Discount Schedules

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Purpose and when to use this record

Define a reusable customer or sales discount arrangement and the rules that determine when it applies.

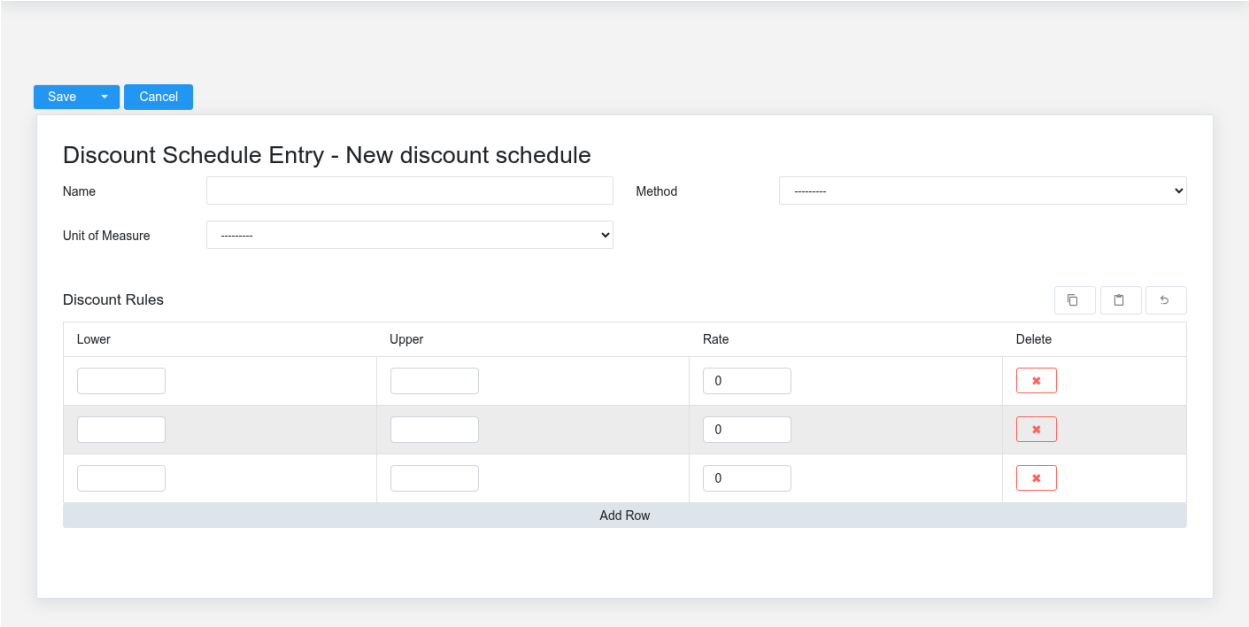
At a glance

- **Identify it by: Name**.
- **Check its business context: Unit Of Measure**.
- **Why care:** These master records supply defaults and choices to later transactions. Correct duplicates and inactive records before staff build more activity on the wrong record.

Before you begin

You need the Brisk permission for the action you are taking on discount schedules. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Create a discount schedule



The Discount Schedules create screen in the Brisk documentation demo.

Create a discount schedule only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Unit Of Measure**.
2. Enter the required identifying and operational values: **Name**.
3. Review **Method** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the discount schedule, then confirm **Name** on its detail page before continuing.

After saving: Open **Customers**, and **Discount Rules** and confirm the discount schedule appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a discount schedule

Delete this discount schedule only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Customers**, and **Discount Rules**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Discount Schedules list and make sure only the intended discount schedule was removed.

Review discount schedule details

Use the detail page as the shared record of what this discount schedule currently means. Verify **Method** before relying on it for a decision.

Follow **Unit Of Measure** to determine whether the issue is on this discount schedule or on one of those linked records.

Next check: Open **Customers**, and **Discount Rules** and confirm the discount schedule appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

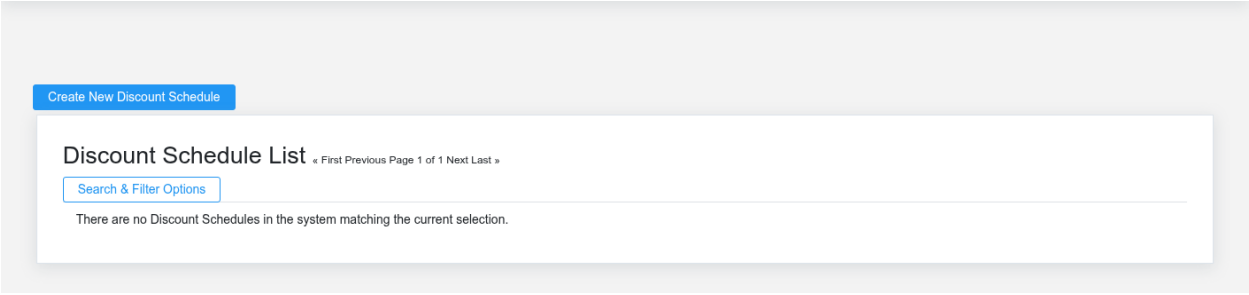
Edit an existing discount schedule

Edit this discount schedule when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Unit Of Measure** with the supporting document or approved request.
2. Recheck **Method**. These values are most likely to change future transactions, defaults, assignment, pricing, and reporting.
3. Save the change, return to the list, and confirm that the discount schedule now appears under the expected **Method**.

After the change: Open **Customers**, and **Discount Rules** and confirm the discount schedule appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review discount schedules



The Discount Schedules list screen in the Brisk documentation demo.

Use the Discount Schedules list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Unit Of Measure**.

Open the discount schedule whose **Name** match the task. If it is missing, clear the list filters and recheck **Method** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 3 user-relevant fields for this discount schedule, including 1 linked-record selection and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Human-readable name for this discount schedule.
Method	No	The method recorded for this discount schedule. Available values: Volume, Weight.
Unit Of Measure	No	If the method is set to weight, sets the unit of measure on the discount rules.

What happens next

Open **Customers**, and **Discount Rules** and confirm the discount schedule appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Unit Of Measure** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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