

Fulfillment Methods

Fulfillment Methods

Purpose and when to use this record

Define the pickup, delivery, shipment, or other handoff choices available to sales and ecommerce orders.

At a glance

- **Identify it by: Name.**
- **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 fulfillment methods. 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 fulfillment method

The Fulfillment Methods create screen in the Brisk documentation demo.

Create a fulfillment method 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.
2. Enter the required identifying and operational values: **Name**, and **Description**.
3. Review **Tracking Url** against the source document or approved setup decision.
4. Save the fulfillment method, then confirm **Name** on its detail page before continuing.

After saving: Open **Orders**, **Sale Fulfillments**, and **Stores** and confirm the fulfillment method 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 fulfillment method

Delete this fulfillment method 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 **Orders**, **Sale Fulfillments**, and **Stores**. 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 Fulfillment Methods list and make sure only the intended fulfillment method was removed.

Review fulfillment method details

Use the detail page as the shared record of what this fulfillment method currently means. Verify **Name**, **Description**, and **Tracking Url** before relying on it for a decision.

Compare the fulfillment method with its source document or approved setup request before deciding that it needs correction.

Next check: Open **Orders**, **Sale Fulfillments**, and **Stores** and confirm the fulfillment method appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

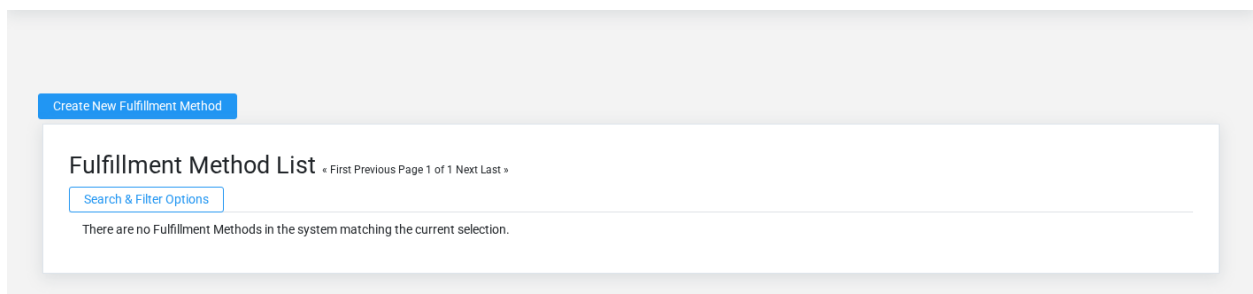
Edit an existing fulfillment method

Edit this fulfillment method 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 **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. 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 fulfillment method now appears under the expected **Name**.

After the change: Open **Orders**, **Sale Fulfillments**, and **Stores** and confirm the fulfillment method 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 fulfillment methods



The Fulfillment Methods list screen in the Brisk documentation demo.

Use the Fulfillment Methods list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the fulfillment method whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 3 user-relevant fields for this fulfillment method, including 0 linked-record selections and 0 controlled-choice fields. 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 fulfillment method.
Description	Yes	Description of this fulfillment method.
Tracking Url	No	The tracking url recorded for this fulfillment method.

What happens next

Open **Orders**, **Sale Fulfillments**, and **Stores** and confirm the fulfillment method 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 **Description** 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:** Compare this fulfillment method with the source document or approved setup decision, then check the downstream screen where it is used.