Receipt Templates

Receipt Templates

Purpose and when to use this record

Maintain receipt layout and business text used for point-of-sale or transaction printing.

At a glance

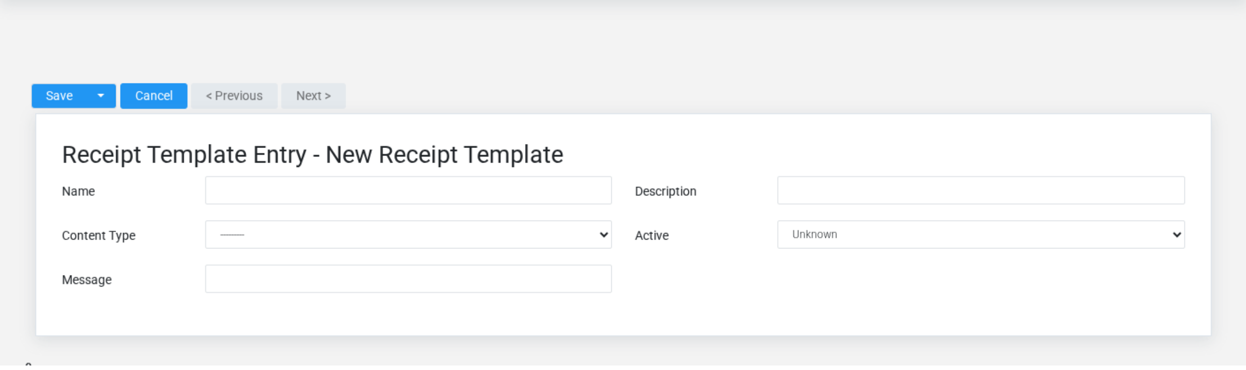
- **Identify it by: Name**.
- **Check its business context: Content Type**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on receipt templates. 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.

Have valid **Content Type** records ready first. Those selections determine where this Receipt Template belongs and which later screens can find it.

Create a Receipt Template



The Receipt Templates create screen in the Brisk documentation demo.

Create a Receipt Template 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: **Content Type**.
2. Enter the required identifying and operational values: **Name**, **Description**, and **Content Type**.
3. Review **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Receipt Template, then confirm **Name** on its detail page before continuing.

After saving: Open the screen that uses this choice and confirm the Receipt Template 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 Receipt Template

Delete this Receipt Template 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.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

On the confirmation page, verify **Name**. After confirmation, return to the Receipt Templates list and make sure only the intended Receipt Template was removed.

Review Receipt Template details

Use the detail page as the shared record of what this Receipt Template currently means. Verify **Active** before relying on it for a decision.

Follow **Content Type** to determine whether the issue is on this Receipt Template or on one of those linked records.

Next check: Open the screen that uses this choice and confirm the Receipt Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

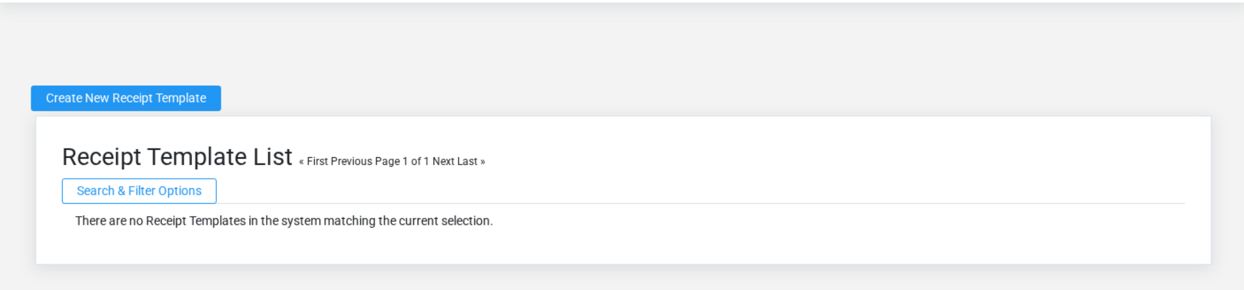
Edit an existing Receipt Template

Edit this Receipt Template 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 **Content Type** with the supporting document or approved request.
2. Recheck **Active**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Receipt Template now appears under the expected **Active**.

After the change: Open the screen that uses this choice and confirm the Receipt Template 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 receipt templates



The Receipt Templates list screen in the Brisk documentation demo.

Use the Receipt Templates list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Content Type**.

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

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

Fields and business rules

Brisk stores 5 user-relevant fields for this Receipt Template, including 1 linked-record selection 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 receipt template.
Description	Yes	Description of this receipt template.
Content Type	Yes	The content type associated with this receipt template.
Active	No	Sets this as the active ESC/POS receipt for a given Content Type.
Message	No	An optional message that will be printed on the bottom of the receipt.

What happens next

Open the screen that uses this choice and confirm the Receipt Template 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**, **Description**, and **Content Type** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Active**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Content Type** 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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