

Cash Drawers

Cash Drawers

Purpose and when to use this record

Maintain the named registers or tills used to assign and reconcile point-of-sale cash activity.

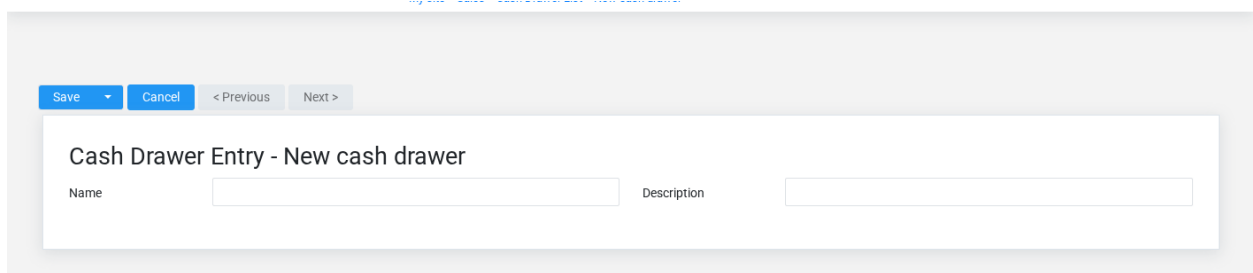
At a glance

- **Identify it by: Name.**
- **Why care:** Customer, warehouse, quantities, prices, tax, payment, and fulfillment represent different parts of the transaction. Review each before treating the sale as complete.

Before you begin

You need the Brisk permission for the action you are taking on cash drawers. 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 cash drawer



Cash Drawer Entry - New cash drawer

Name

Description

The Cash Drawers create screen in the Brisk documentation demo.

Create a cash drawer after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a

duplicate.

1. Select the business context first.
2. Enter the required identifying and operational values: **Name**.
3. Review **Description** against the source document or approved setup decision.
4. Save the cash drawer, then confirm **Name** on its detail page before continuing.

After saving: Verify this cash drawer in **Customer Credits**, **Payouts**, **Returns**, and **Sales**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a cash drawer

Delete this cash drawer 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 **Customer Credits**, **Payouts**, **Returns**, **Sales**, and **Sheriff Bank Deposits**, plus the remaining screen fields. 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 Cash Drawers list and make sure only the intended cash drawer was removed.

Review cash drawer details

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

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

Next check: Verify this cash drawer in **Customer Credits**, **Payouts**, **Returns**, and **Sales**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

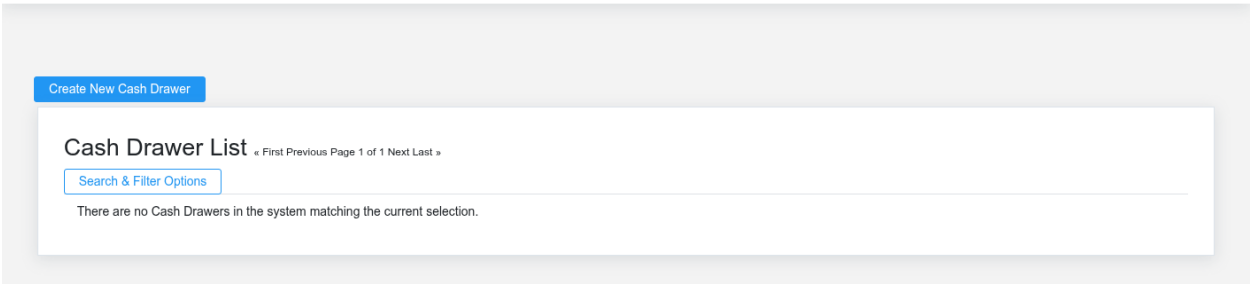
Edit an existing cash drawer

Edit this cash drawer to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

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 customer totals, tax, payment, fulfillment, and receivables.
3. Save the change, return to the list, and confirm that the cash drawer now appears under the expected **Name**.

After the change: Verify this cash drawer in **Customer Credits**, **Payouts**, **Returns**, and **Sales**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review cash drawers



The Cash Drawers list screen in the Brisk documentation demo.

Use the Cash Drawers 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 cash drawer 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 2 user-relevant fields for this cash drawer, 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 cash drawer.
Description	No	Description of this cash drawer.

What happens next

Verify this cash drawer in **Customer Credits**, **Payouts**, **Returns**, and **Sales**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

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:** Compare this cash drawer with the source document or approved setup decision, then check the downstream screen where it is used.

Revision #3

Created 2026-08-10 16:09:34 UTC by Brisk

Updated 2026-08-10 20:29:49 UTC by Brisk