Discount Periods

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Purpose and when to use this record

Schedule a date-bounded percentage promotion and disable it without erasing its history.

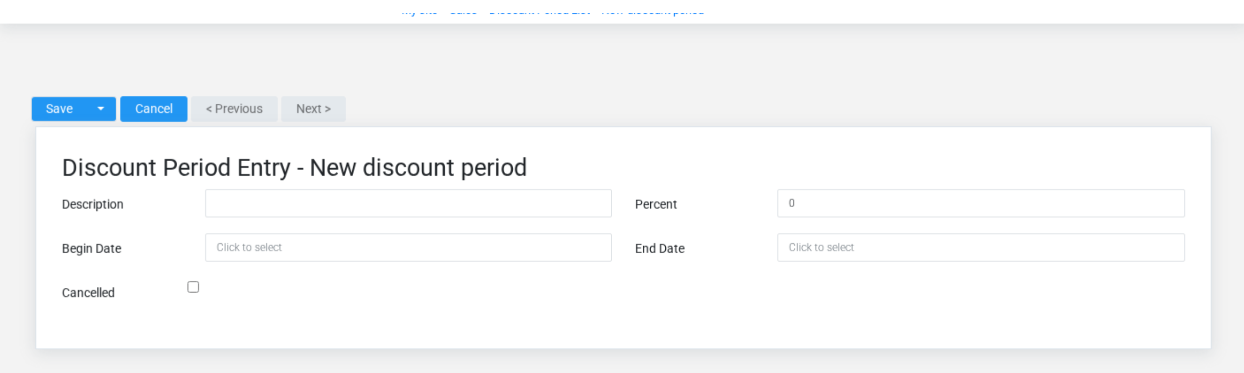
At a glance

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



The Discount Periods create screen in the Brisk documentation demo.

Create a discount period 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: **Description**, **Begin Date**, and **End Date**.
3. Review **Cancelled** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the discount period, then confirm **Begin Date**, and **End Date** on its detail page before continuing.

After saving: Verify this discount period in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a discount period

Delete this discount period 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 **Cancelled** to remove it from future use while preserving existing references.

On the confirmation page, verify **Begin Date**, and **End Date**. After confirmation, return to the Discount Periods list and make sure only the intended discount period was removed.

Review discount period details

Use the detail page as the shared record of what this discount period currently means. Verify **Begin Date**, and **End Date** before relying on it for a decision.

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

Next check: Verify this discount period in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

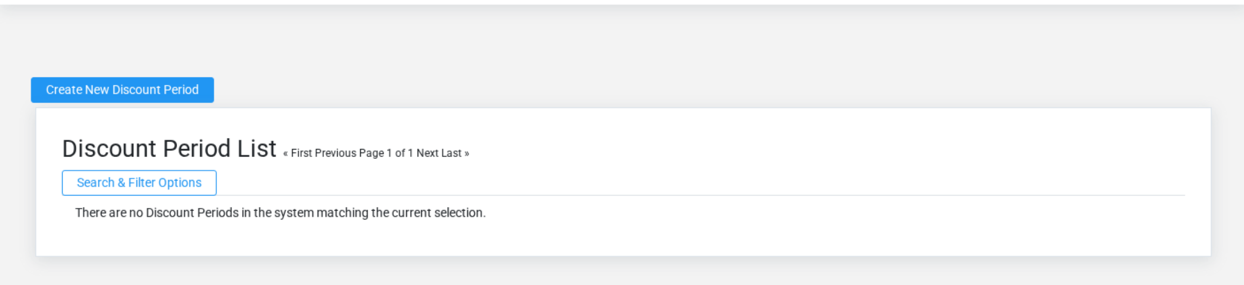
Edit an existing discount period

Edit this discount period 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 **Begin Date**, and **End Date** with the supporting document or approved request.
2. Recheck **Begin Date**, and **End Date**. 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 discount period now appears under the expected **Cancelled**.

After the change: Verify this discount period in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review discount periods



The Discount Periods list screen in the Brisk documentation demo.

Use the Discount Periods list to find the correct record before opening or changing it. Compare **Begin Date**, and **End Date**. Compare the full identifier rather than relying on a similar name.

Open the discount period whose **Begin Date**, and **End Date** match the task. If it is missing, clear the list filters and recheck **Cancelled** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 5 user-relevant fields for this discount period, 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
Description	Yes	Give a memo or reason for this discount.

Field	Required	What it controls
Percent	No	Set the percentage that all items will be discounted for the period of promotion.
Begin Date	Yes	Set the beginning of the discount period.
End Date	Yes	Set the ending of the discount period.
Cancelled	No	Use this field to quickly disable a Discount without changing its dates or deleting it.

What happens next

Verify this discount period in the next transaction or assignment screen 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 **Description**, **Begin Date**, and **End Date** 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 discount period with the source document or approved setup decision, then check the downstream screen where it is used.

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