Sales

Sales

Purpose and when to use this record

Review the commercial transaction from item entry through tax, payment, fulfillment, receivables, and completion.

At a glance

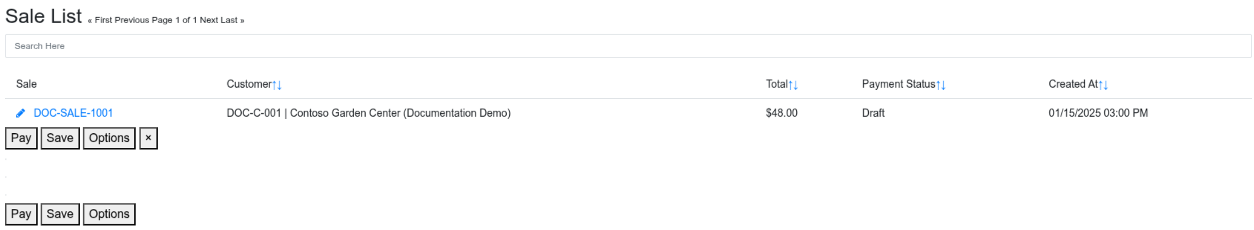
- **Identify it by: Sale #**, **Date Created**, **Fulfillment Status**, **Payment Status**, and **Foodservice Ticket Number**.
- **Check its business context: Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, and **Foodservice Table**.
- **Why care:** Customer, warehouse, quantities, prices, tax, payment, and fulfillment represent different parts of the transaction. Review each before treating the sale as complete.
- **Why care:** Treat posted, processed, paid, reversed, and edit-locked states as controls—not ordinary descriptive fields. Confirm the source transaction before changing any state that the screen permits you to change.

Before you begin

You need the Brisk permission for the action you are taking on sales. 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 **Customer** records ready first. Those selections determine where this sale belongs and which later screens can find it.

Find and review sales



The Sales list screen in the Brisk documentation demo.

Use the Sales list to find the correct record before opening or changing it. Compare **Sale #**, **Date Created**, **Fulfillment Status**, **Payment Status**, and **Foodservice Ticket Number**. Records with similar names or numbers can still belong to different **Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, **Foodservice Table**, and **Foodservice Server**.

- Keyword search checks **Memo**, **Customer Po #**, **Name**, **Item Code**, **Check Number**, and **Card Type**, plus the remaining screen fields.
- Narrow the list with **Customer** filters.
- The date filter uses **Date Created**; choose a range that matches the business event you are reconciling.

Open the sale whose **Sale #**, **Date Created**, **Fulfillment Status**, **Payment Status**, and **Foodservice Ticket Number** match the task. If it is missing, clear the list filters and recheck **Customer**, **Date Created**, **Fulfillment Status**, **Payment Status**, **Amount Paid**, and **Edit Locked** rather than creating a replacement immediately.

Create a sale

Create a sale only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, **Foodservice Table**, and **Foodservice Server**.
2. Enter the required identifying and operational values: **Sale #**, **Customer**, and **Date Created**.
3. Review **Fulfillment Status**, **Fulfillment Required**, **Payment Status**, and **Edit Locked** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the sale, then confirm **Sale #**, **Date Created**, **Fulfillment Status**, **Payment Status**, and **Foodservice Ticket Number** on its detail page before continuing.

After saving: Use Payment Status and Fulfillment Status separately: collecting money does not prove delivery, and fulfilling an order does not prove payment.

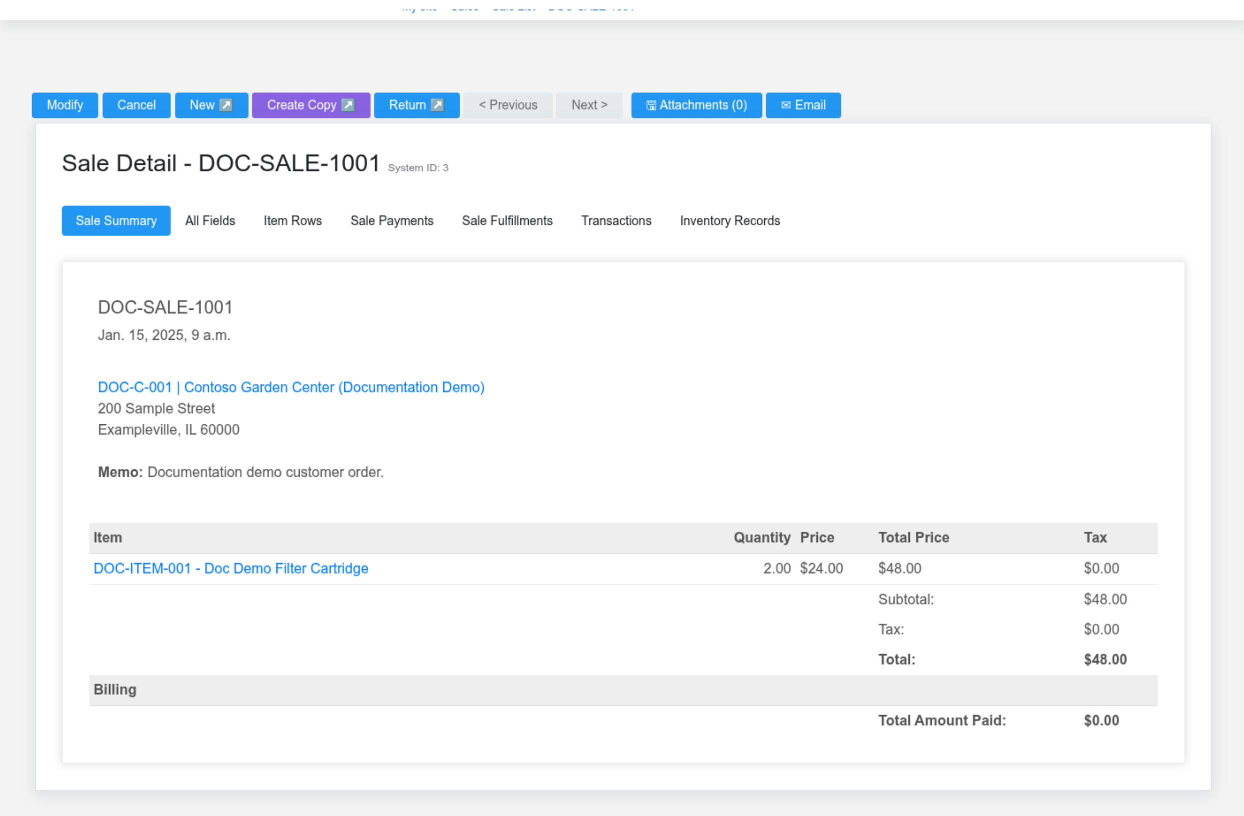
Delete a sale

Delete this sale only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Commodity Sales**, **Customer Credits**, **Customer Payoff Records**, **Emv Refunds**, and **Inventory Records**, 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 **Sale #**, **Date Created**, **Fulfillment Status**, **Payment Status**, and **Foodservice Ticket Number**. After confirmation, return to the Sales list and make sure only the intended sale was removed.

Review sale details



A draft fictional customer sale with two filter cartridges and an unpaid balance.

Use the detail page as the shared record of what this sale currently means. Verify **Date Created**, **Fulfillment Status**, **Payment Status**, **Non-Discount Subtotal**, **Subtotal**, and **Tax Total**, plus the remaining screen fields before relying on it for a decision.

Follow **Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, **Foodservice Table**, and **Foodservice Server** to determine whether the issue is on this sale or on one of those linked records.

Next check: Use Payment Status and Fulfillment Status separately: collecting money does not prove delivery, and fulfilling an order does not prove payment.

Edit an existing sale

Edit this sale to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, **Foodservice Table**, and **Foodservice Server** with the supporting document or approved request.
2. Recheck **Customer**, **Date Created**, **Warehouse**, **Fulfillment Status**, **Payment Status**, and **Customer Po #**, plus the remaining screen fields. 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 sale now appears under the expected **Fulfillment Status**, **Payment Status**, **Amount Paid**, and **Edit Locked**.

After the change: Use Payment Status and Fulfillment Status separately: collecting money does not prove delivery, and fulfilling an order does not prove payment.

Fields and business rules

Brisk stores 28 user-relevant fields for this sale, including 6 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Sale #	Yes	A sale's friendly name, used to identify the transaction in receipts, reports, and searches.
Customer	Yes	The customer that made this purchase.
Date Created	Yes	The date and time that this transaction was started.
Salesperson	No	The salesperson assigned to this sale.
Warehouse	No	The physical location from which inventory items for this sale are sourced.

Field	Required	What it controls
Fulfillment Status	No	Status information for pending deliveries or shipments for this sale. Available values: Draft, Submitted, Fulfilled, Contested, Complete, Cancelled.
Fulfillment Required	No	Marked as false for direct retail sales and service items, marked as true when shipments or deliveries are necessary.
Payment Status	No	Status information for pending payments and/or accounts receivable. Available values: Draft, Unbilled, Receivable, Paid, Refunded, Cancelled.
Memo	No	An open text field for employees to make notes about this transaction.
Customer Po #	No	An optional field to make note of the customer's purchase order number.
Non-Discount Subtotal	No	If a cash discount is applied to the ticket, this field represents the original, undiscounted subtotal.
Subtotal	No	The total sales price of all line items before sales tax.
Tax Total	No	The total sales tax due for this sale.
Non-Discount Total	No	If a cash discount is applied to the ticket, this field represents the original, undiscounted total.
Payment Terms Discount	No	Discount granted when eligible payment terms are paid immediately by cash, check, or card.
Total	No	The total value recorded for this sale.
Amount Paid	No	The amount paid value recorded for this sale.
Balance	No	The balance value recorded for this sale.
Edit Locked	No	Whether the edit locked option applies to this sale.
Cash Drawer	No	Links this sale to the cash drawer that it was rung up at.
Pos Client Request Id	No	Idempotency key supplied by the Point of Sale client for online and offline ticket submissions.

Field	Required	What it controls
Foodservice Mode	No	The foodservice mode recorded for this sale.
Foodservice Order Type	No	The foodservice order type recorded for this sale.
Foodservice Ticket Number	No	The foodservice ticket number recorded for this sale.
Foodservice Notes	No	The foodservice notes recorded for this sale.
Guest Count	No	The guest count value recorded for this sale.
Foodservice Table	No	The foodservice table associated with this sale.
Foodservice Server	No	The foodservice server associated with this sale.

What happens next

Use Payment Status and Fulfillment Status separately: collecting money does not prove delivery, and fulfilling an order does not prove payment.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Sale #**, **Customer**, and **Date Created** 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 **Fulfillment Status**, **Payment Status**, **Amount Paid**, and **Edit Locked**, 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 **Customer**, **Salesperson**, **Warehouse**, **Cash Drawer**, **Foodservice Table**, and **Foodservice Server** 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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