

Tasks and Screens

- [Account Reference Troubleshooting](#)

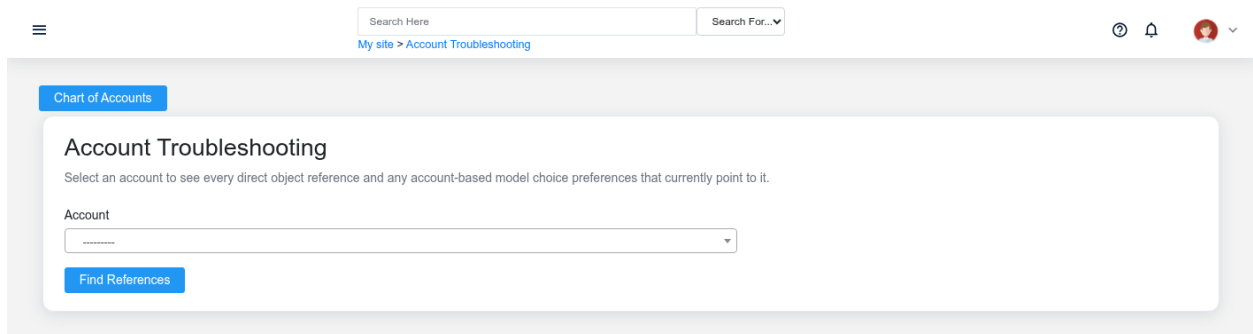
Account Reference Troubleshooting

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Purpose and when to use this screen

Use Account Reference Troubleshooting when a chart-of-accounts record cannot be safely disabled, replaced, or removed, or when you need to understand where the account is used. The report searches both saved model relationships and system/user preference values; it does not modify any reference.

Review account references



The Account Reference Troubleshooting references screen in the Brisk documentation demo.

1. Select the [Account](#) and choose **Find References**.
2. Read the total reference counts before opening individual rows.
3. Review each grouped model/field section. The **Object** and **ID** identify the record; open the record through its normal screen when a link is available.
4. Review **Preference References** separately. These show scope, preference label/key, and user when a system or user default still names the account.

Interpret the result

A reference can be historical, operational, or configuration-only. A posted transaction normally should keep its original account for audit and reporting. An open transaction may need correction at its source. A preference may need to be reassigned so future documents stop selecting the account. Do not mass-change every occurrence without distinguishing those cases.

Replace an obsolete account safely

Create or identify the approved replacement, update organization and user defaults, then update open setup or transactions through their normal workflows. Prefer disabling the obsolete account when historical transactions still refer to it. Re-run the reference report and document any references intentionally retained.

If the report is empty or surprising

Confirm the selected account and whether the dependency is stored directly, through a parent account, or in a posted transaction. This screen reports known model and preference relationships; code, imported files, external reports, or free-text notes may still mention an account number. Validate critical replacements with representative posting and reports before considering the work complete.