Expense Categories

Expense Categories

Purpose and when to use this record

Maintain the categories used to group small business expenses for entry and later analysis.

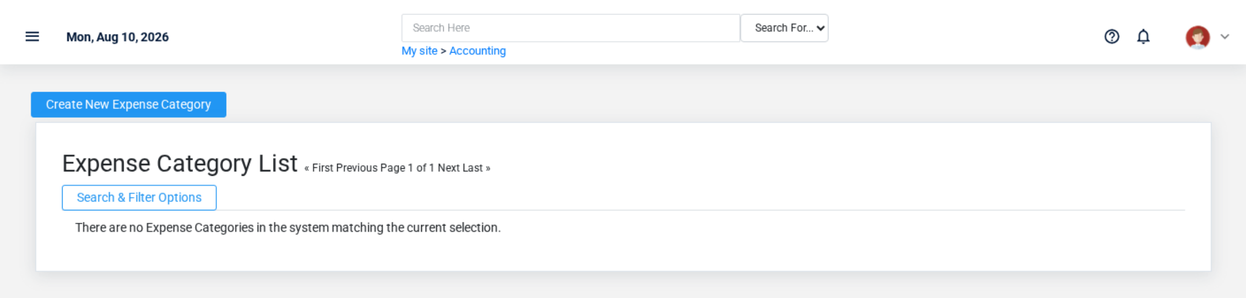
At a glance

- **Identify it by: Name**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.

Before you begin

You need the Brisk permission for the action you are taking on expense categories. 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.

Find and review expense categories



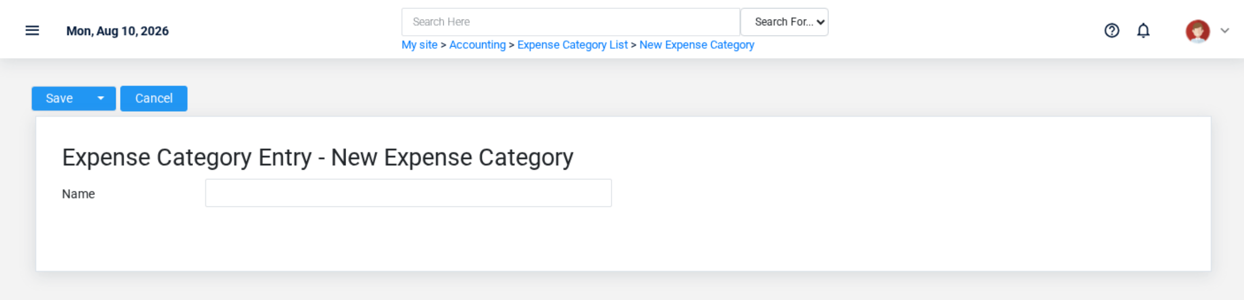
The Expense Categories list screen in the Brisk documentation demo.

Use the Expense Categories 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 Expense Category 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.

Create an Expense Category



The Expense Categories create screen in the Brisk documentation demo.

Create an Expense Category 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.
2. Enter the required identifying and operational values: **Name**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Expense Category, then confirm **Name** on its detail page before continuing.

After saving: Open **Expense Records** and confirm the Expense Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete an Expense Category

Delete this Expense Category 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 **Expense Records**. 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 Expense Categories list and make sure only the intended Expense Category was removed.

Review Expense Category details

Use the detail page as the shared record of what this Expense Category currently means. Verify **Name** before relying on it for a decision.

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

Next check: Open **Expense Records** and confirm the Expense Category 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 Expense Category

Edit this Expense Category 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 **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change account balances, financial periods, and statement results.
3. Save the change, return to the list, and confirm that the Expense Category now appears under the expected **Name**.

After the change: Open **Expense Records** and confirm the Expense Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Fields and business rules

Brisk stores 1 user-relevant fields for this Expense Category, 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	Define the category name.

What happens next

Open **Expense Records** and confirm the Expense Category 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** 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 Expense Category with the source document or approved setup decision, then check the downstream screen where it is used.

Revision #3
Created 2026-08-10 16:07:13 UTC by Brisk
Updated 2026-08-10 20:23:46 UTC by Brisk