Memorized Transactions

Memorized Transactions

Purpose and when to use this record

Save a reusable journal-entry or vendor-invoice pattern for recurring transactions while controlling date refresh and availability.

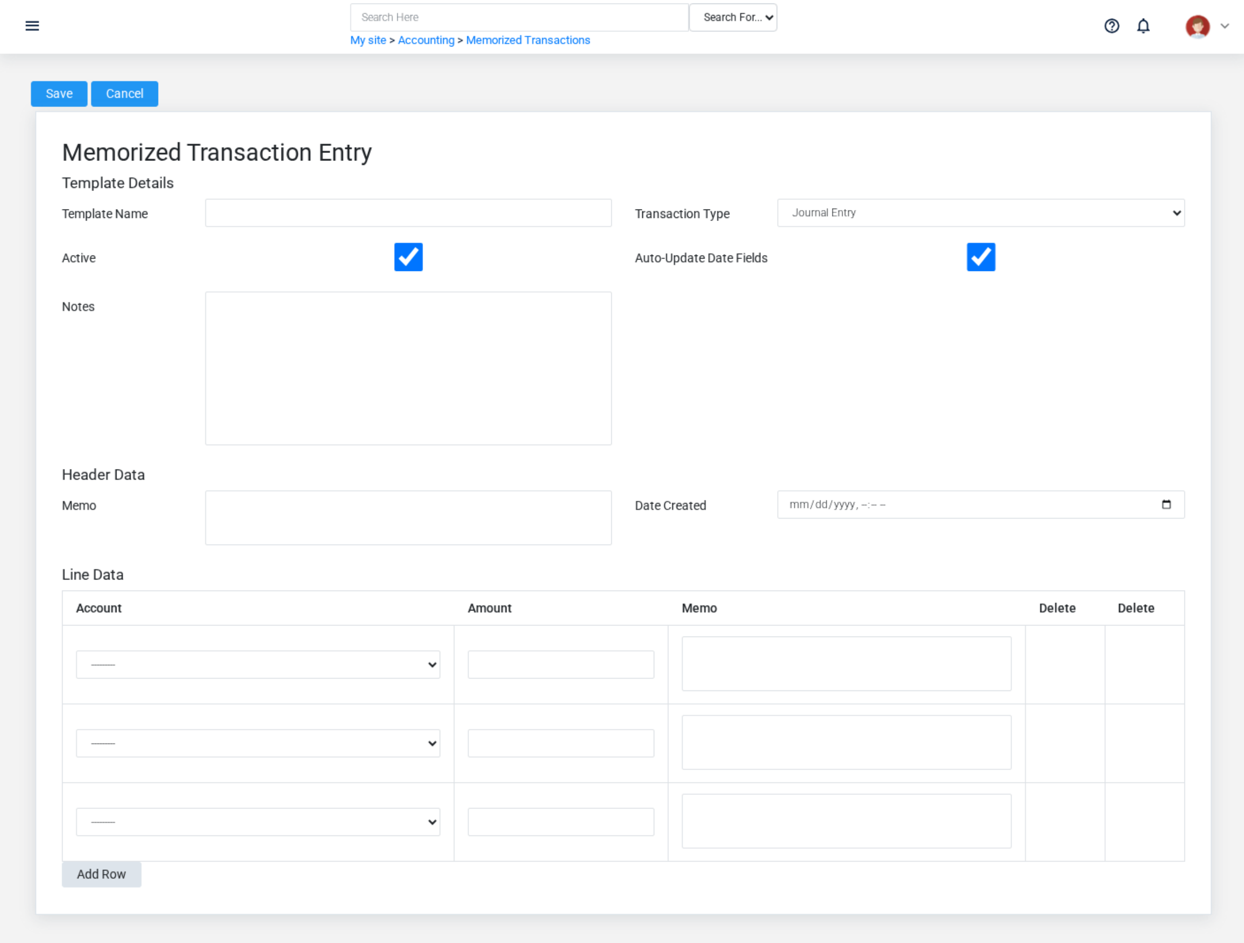
At a glance

- **Identify it by: Template Name**, and **Auto-Update Date Fields**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.
- **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 memorized transactions. 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 Memorized Transaction



The Memorized Transactions create screen in the Brisk documentation demo.

Create a Memorized Transaction 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: **Template Name**, and **Transaction Type**.
3. Review **Transaction Type**, **Auto-Update Date Fields**, and **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Memorized Transaction, then confirm **Template Name**, and **Auto-Update Date Fields** on its detail page before continuing.

After saving: Verify this Memorized Transaction 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 Memorized Transaction

Delete this Memorized Transaction 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 **Active** to remove it from future use while preserving existing references.

On the confirmation page, verify **Template Name**, and **Auto-Update Date Fields**. After confirmation, return to the Memorized Transactions list and make sure only the intended Memorized Transaction was removed.

Review Memorized Transaction details

Use the detail page as the shared record of what this Memorized Transaction currently means. Verify **Transaction Type**, **Auto-Update Date Fields**, and **Active** before relying on it for a decision.

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

Next check: Verify this Memorized Transaction 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 memorized transactions

The Memorized Transactions list screen in the Brisk documentation demo.

Use the Memorized Transactions list to find the correct record before opening or changing it. Compare **Template Name**, and **Auto-Update Date Fields**. Compare the full identifier rather than relying on a similar name.

- Keyword search checks **Template Name**, and **Notes**.

Open the Memorized Transaction whose **Template Name**, and **Auto-Update Date Fields** match the task. If it is missing, clear the list filters and recheck **Transaction Type**, and **Active** rather than creating a replacement immediately.

Edit an existing Memorized Transaction

Edit this Memorized Transaction 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 **Template Name**, and **Auto-Update Date Fields** with the supporting document or approved request.
2. Recheck **Transaction Type**, **Auto-Update Date Fields**, and **Active**. 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 Memorized Transaction now appears under the expected **Transaction Type**, and **Active**.

After the change: Verify this Memorized Transaction 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.

Fields and business rules

Brisk stores 7 user-relevant fields for this Memorized Transaction, including 0 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Template Name	Yes	Human-readable name for this memorized transaction.
Transaction Type	Yes	The transaction type recorded for this memorized transaction. Available values: Journal Entry, Vendor Invoice.
Header Data	No	The header data recorded for this memorized transaction.
Line Data	No	The line data recorded for this memorized transaction.
Auto-Update Date Fields	No	If enabled, date fields are refreshed to today when this template is applied.
Active	No	Whether this memorized transaction is active and available for use.
Notes	No	Additional internal notes about this memorized transaction.

What happens next

Verify this Memorized Transaction 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 **Template Name**, and **Transaction Type** 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 **Transaction Type**, and **Active**, 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:** Compare this Memorized Transaction with the source document or approved setup decision, then check the downstream screen where it is used.

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