Quarters

Quarters

Purpose and when to use this record

Define quarterly accounting boundaries and lock completed quarters against ordinary transaction changes.

At a glance

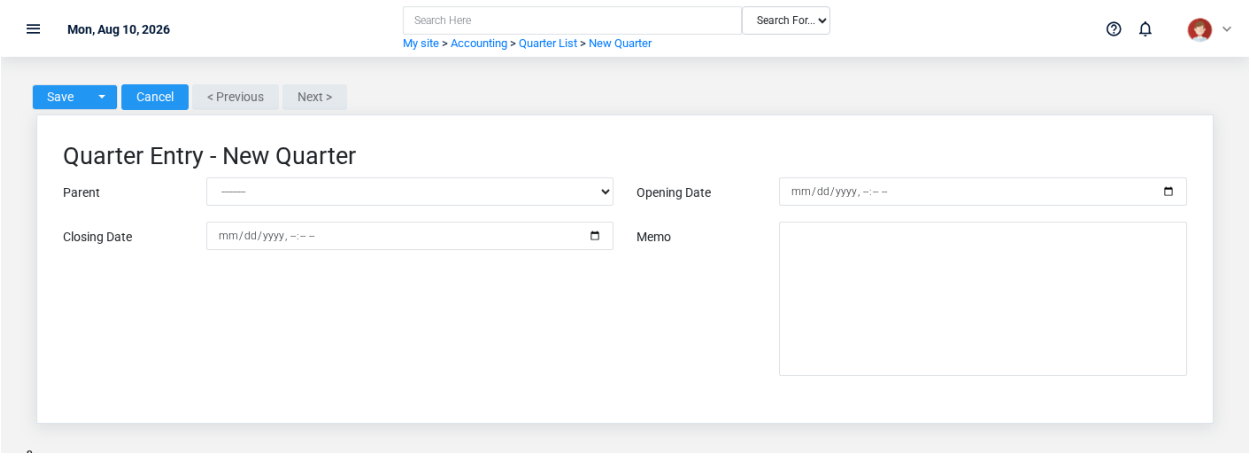
- **Identify it by: Parent**, **Opening Date**, **Closing Date**, and **Locked**.
- **Check its business context: Parent**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.
- **Why care:** 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 quarters. 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 **Parent** records ready first. Those selections determine where this Quarter belongs and which later screens can find it.

Create a Quarter



The Quarters create screen in the Brisk documentation demo.

Create a Quarter 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: **Parent**.
2. Enter the required identifying and operational values: **Parent**, and **Opening Date**.
3. Review **Locked** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Quarter, then confirm **Parent**, **Opening Date**, **Closing Date**, **Locked**, and **Memo** on its detail page before continuing.

After saving: Verify this Quarter in **Months** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Quarter

Delete this Quarter 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 **Months**. 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 **Parent**, **Opening Date**, **Closing Date**, and **Locked**. After confirmation, return to the Quarters list and make sure only the intended Quarter was removed.

Review Quarter details

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

Follow **Parent** to determine whether the issue is on this Quarter or on one of those linked records.

Next check: Verify this Quarter in **Months** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

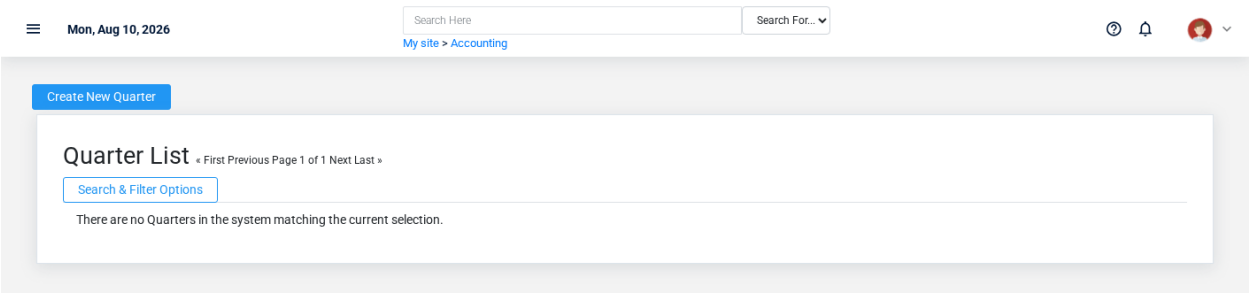
Edit an existing Quarter

Edit this Quarter 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 **Parent** with the supporting document or approved request.
2. Recheck **Locked**. 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 Quarter now appears under the expected **Locked**.

After the change: Verify this Quarter in **Months** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review quarters



The Quarters list screen in the Brisk documentation demo.

Use the Quarters list to find the correct record before opening or changing it. Compare **Parent**, **Opening Date**, **Closing Date**, and **Locked**. Records with similar names or numbers can still belong to different **Parent**.

- The initial order emphasizes **Opening Date**. Select a column heading when you need a different comparison.

Open the Quarter whose **Parent**, **Opening Date**, **Closing Date**, and **Locked** match the task. If it is missing, clear the list filters and recheck **Locked** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 5 user-relevant fields for this Quarter, including 1 linked-record selection 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
Parent	Yes	Parent quarter in the hierarchy.
Opening Date	Yes	Date and time recorded for opening date on this quarter.
Closing Date	No	Date and time recorded for closing date on this quarter.
Locked	No	Whether the locked option applies to this quarter.
Memo	No	The memo recorded for this quarter.

What happens next

Verify this Quarter in **Months** 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 **Parent**, and **Opening Date** 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 **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 **Parent** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3
Created 2026-08-10 16:07:22 UTC by Brisk
Updated 2026-08-10 20:24:07 UTC by Brisk