

Vehicles

Vehicles

Purpose and when to use this record

Maintain the business vehicles available for mileage-expense records.

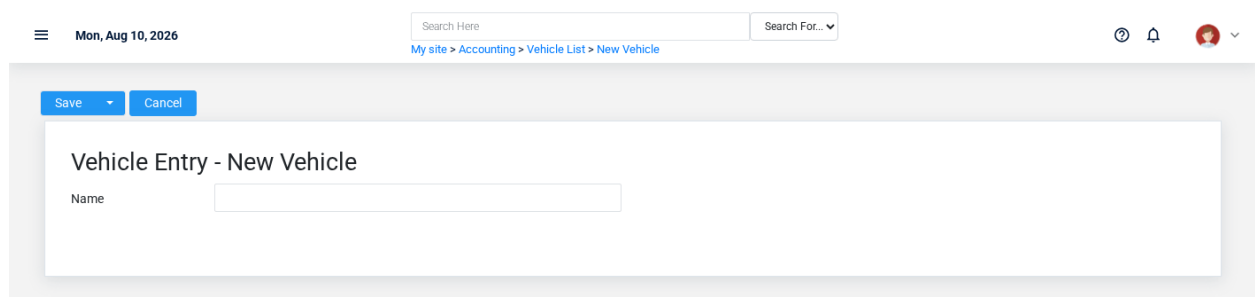
At a glance

- **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 vehicles. 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 Vehicle



The screenshot shows a web interface for creating a new vehicle. At the top, there is a navigation bar with a hamburger menu, the date 'Mon, Aug 10, 2026', a search bar with 'Search Here' and 'Search For...' dropdowns, and user profile icons. Below the navigation bar is a breadcrumb trail: 'My site > Accounting > Vehicle List > New Vehicle'. The main form area has a title bar with 'Save' and 'Cancel' buttons. The form itself is titled 'Vehicle Entry - New Vehicle' and contains a single input field labeled 'Name'.

The Vehicles create screen in the Brisk documentation demo.

Create a Vehicle 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: **Name**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Vehicle, then confirm **Name** on its detail page before continuing.

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

Delete a Vehicle

Delete this Vehicle 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 **Mileage 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 Vehicles list and make sure only the intended Vehicle was removed.

Review Vehicle details

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

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

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

Edit an existing Vehicle

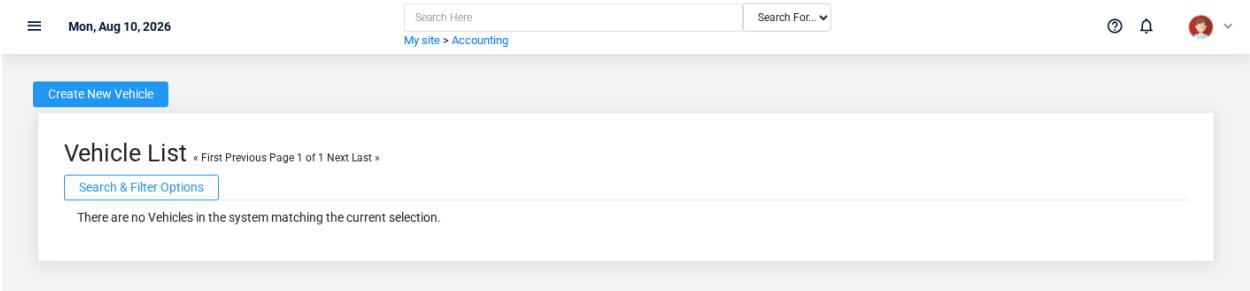
Edit this Vehicle to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **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 Vehicle now appears under the expected **Name**.

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

Find and review vehicles



The Vehicles list screen in the Brisk documentation demo.

Use the Vehicles list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

Open the Vehicle 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.

Fields and business rules

Brisk stores 1 user-relevant fields for this Vehicle, 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	Set the name of this vehicle.

What happens next

Verify this Vehicle in **Mileage Records** 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 **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 Vehicle with the source document or approved setup decision, then check the downstream screen where it is used.
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Revision #3

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