

Years

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Purpose and when to use this record

Define the organization's accounting-year boundaries and lock a completed year against ordinary edits.

At a glance

- **Identify it by:** **Opening Date**, **Closing Date**, **Locked**, and **Memo**.
- **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 years. 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 Year

The Years create screen in the Brisk documentation demo.

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

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

Delete a Year

Delete this Year 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**, and **Quarters**. 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 **Opening Date**, **Closing Date**, **Locked**, and **Memo**. After confirmation, return to the Years list and make sure only the intended Year was removed.

Review Year details

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

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

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

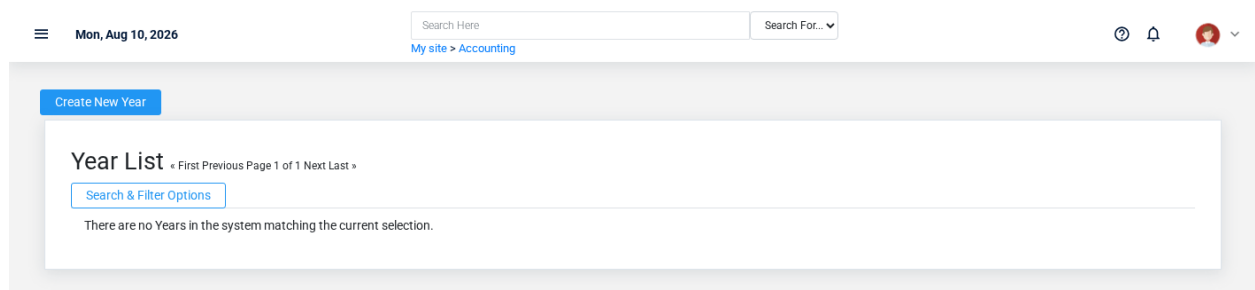
Edit an existing Year

Edit this Year 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 the identifying information shown on the screen 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 Year now appears under the expected **Locked**.

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

Find and review years



The Years list screen in the Brisk documentation demo.

Use the Years list to find the correct record before opening or changing it. Compare **Opening Date**, **Closing Date**, **Locked**, and **Memo**. Compare the full identifier rather than relying on a similar name.

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

Open the Year whose **Opening Date**, **Closing Date**, **Locked**, and **Memo** 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 4 user-relevant fields for this Year, 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
Opening Date	Yes	Date and time recorded for opening date on this year.
Closing Date	No	Date and time recorded for closing date on this year.
Locked	No	Whether the locked option applies to this year.
Memo	No	The memo recorded for this year.

What happens next

Verify this Year in **Months**, and **Quarters** 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 **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:** Compare this Year with the source document or approved setup decision, then check the downstream screen where it is used.