

Brisk

Brisk managed documentation

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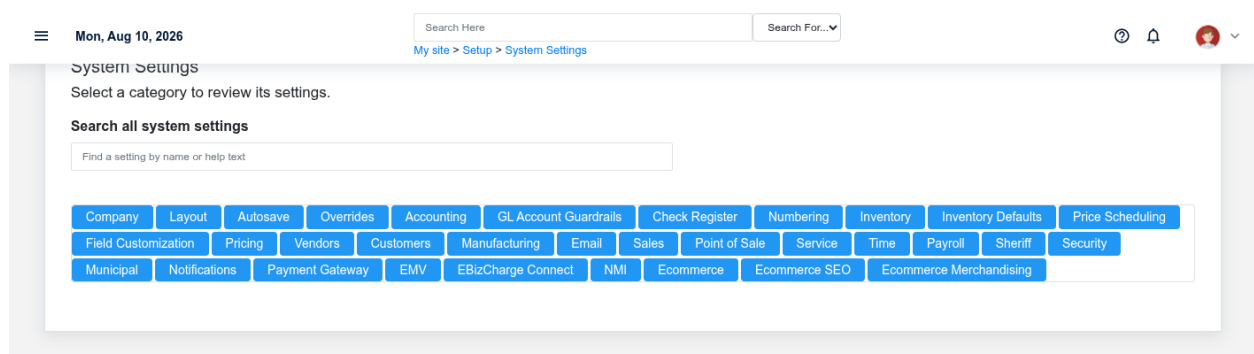
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Brisk overview



The Brisk workspace related to this reference article.

Brisk organizes operational work into shared master records, business transactions, focused task screens, reports, and setup. A customer or item may be reused across several modules, while a sale, service order, purchase, payroll run, or case preserves one business event and its status history.

Find the right place to work

Start in the module that owns the business event: Management for shared customers, vendors, and employees; Inventory for items and stock; Sales for customer transactions; Accounting for ledger, payables, receivables, and banking; Service or Manufacturing for operational work; Setup for configuration and access. Use Reports to analyze saved activity rather than to change its source.

Use contextual help

Open the question-mark menu on the current Brisk screen and select **Open Help Article**. Brisk sends the screen's named route—not the customer, record number, or other URL data—to the matching BookStack article and section. Read the purpose and prerequisites before following the create, edit, delete, or troubleshooting steps. See [Using Brisk Help](#) for fallback behavior and

privacy details.

Protect business history

Search before creating a record, verify warehouse and date context, and use status changes only when the underlying work has occurred. Prefer disabling obsolete setup records and correcting source transactions over deleting history or adding unrelated adjustments. When a control is unavailable, ask an administrator to review access instead of using another person's account.