Reporting Stores

Reporting Stores

Purpose and when to use this record

Configure a participating store’s reporting endpoint, timezone, currency, transport safeguards, and synchronization health.

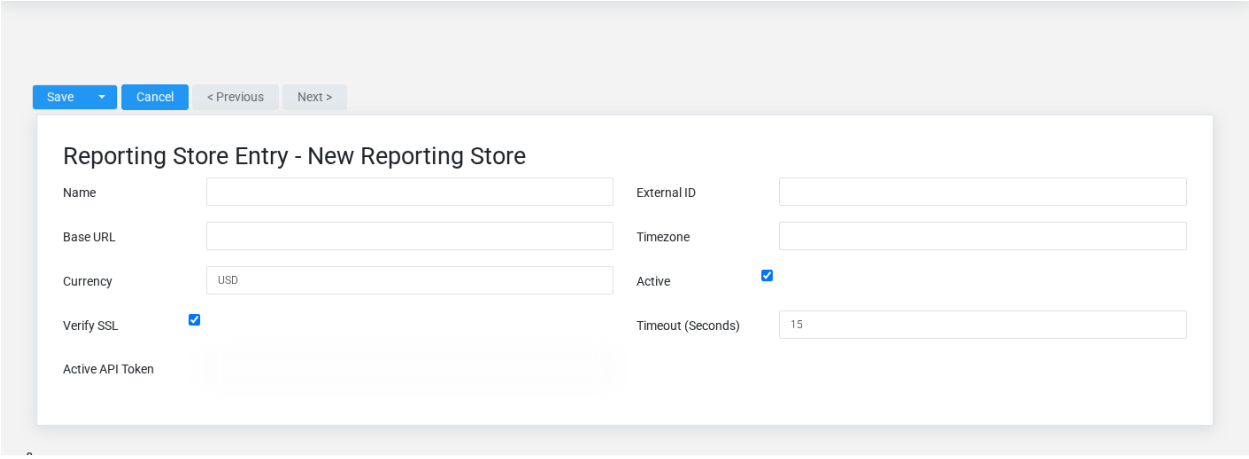
At a glance

- **Identify it by: Name**.
- **Why care:** Consolidated results are only as reliable as store connectivity, account mapping, currency/timezone setup, and the status of the latest run.
- **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 reporting stores. 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 Reporting Store



The Reporting Stores create screen in the Brisk documentation demo.

Create a Reporting Store 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**, and **Base Url**.
3. Review **Active**, and **Verify Ssl** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Reporting Store, then confirm **Name** on its detail page before continuing.

After saving: Verify this Reporting Store in **Adjustment Lines**, **Adjustment Snapshot Lines**, **General Ledger Snapshot Lines**, and **General Ledger Snapshot States**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Reporting Store

Delete this Reporting Store 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.

Before confirming, check for related **Adjustment Lines**, **Adjustment Snapshot Lines**, **General Ledger Snapshot Lines**, **General Ledger Snapshot States**, and **Reporting Store Accounts**, plus the remaining screen fields. 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 Reporting Stores list and make sure only the intended Reporting Store was removed.

Review Reporting Store details

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

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

Next check: Verify this Reporting Store in **Adjustment Lines**, **Adjustment Snapshot Lines**, **General Ledger Snapshot Lines**, and **General Ledger Snapshot States**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

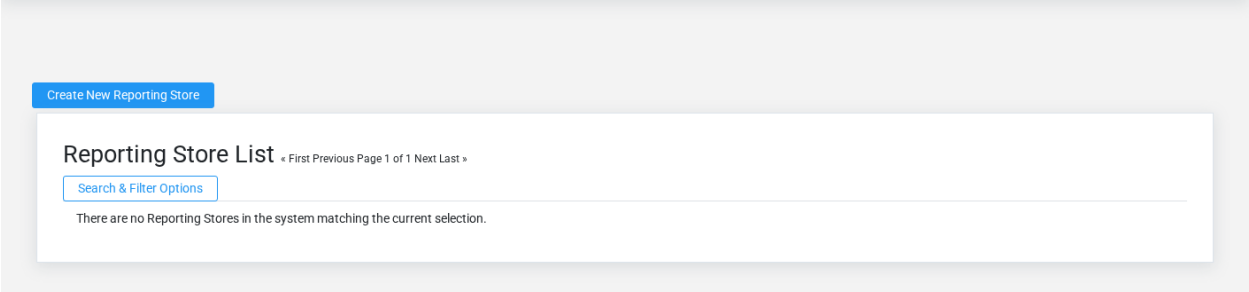
Edit an existing Reporting Store

Edit this Reporting Store 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 **Active**. These values are most likely to change store mapping and consolidated statement results.
3. Save the change, return to the list, and confirm that the Reporting Store now appears under the expected **Active**.

After the change: Verify this Reporting Store in **Adjustment Lines**, **Adjustment Snapshot Lines**, **General Ledger Snapshot Lines**, and **General Ledger Snapshot States**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review reporting stores



The Reporting Stores list screen in the Brisk documentation demo.

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

- Keyword search checks **Name**, **External Id**, **Base Url**, **Timezone**, **Currency**, and **Last Error**.
- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the Reporting Store whose **Name** match the task. If it is missing, clear the list filters and recheck **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this Reporting Store, 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	Human-readable name for this reporting store.
External Id	No	URL-safe identifier for this reporting store.
Base Url	Yes	URL recorded as base url for this reporting store.
Timezone	No	The timezone recorded for this reporting store.
Currency	No	The currency recorded for this reporting store.
Active	No	Whether this reporting store is active and available for use.
Verify Ssl	No	Whether the verify ssl option applies to this reporting store.
Timeout (Seconds)	No	The timeout (seconds) value recorded for this reporting store.
Last Successful Sync At	No	Date and time recorded for last successful sync at on this reporting store.
Last Ping At	No	Date and time recorded for last ping at on this reporting store.
Last Error	No	The last error recorded for this reporting store.

What happens next

Verify this Reporting Store in **Adjustment Lines**, **Adjustment Snapshot Lines**, **General Ledger Snapshot Lines**, and **General Ledger Snapshot States**, plus the remaining screen fields 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 **Base Url** 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 **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 Reporting Store with the source document or approved setup decision, then check the downstream screen where it is used.

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