

Collections

Collections

Purpose and when to use this record

Curate a published product grouping using explicit products or tags and control whether it appears in storefront navigation.

At a glance

- **Identify it by: Name.**
- **Check its business context: Store.**
- **Why care:** Store, publication, consent, payment, and fulfillment states affect what customers see and what staff must act on; check the correct store before saving.
- **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 collections. 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 **Store** records ready first. Those selections determine where this Collection belongs and which later screens can find it.

Create a Collection

The Collections create screen in the Brisk documentation demo.

Create a Collection 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: **Store**.
2. Enter the required identifying and operational values: **Store**, and **Name**.
3. Review **Is Published**, and **Show In Navigation** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Collection, then confirm **Name** on its detail page before continuing.

After saving: Verify this Collection in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Collection

Delete this Collection 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 **Is Published** to remove it from future use while preserving existing references.

On the confirmation page, verify **Name**. After confirmation, return to the Collections list and make sure only the intended Collection was removed.

Review Collection details

Use the detail page as the shared record of what this Collection currently means. Verify **Store**, **Name**, **Slug**, and **Description** before relying on it for a decision.

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

Next check: Verify this Collection in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

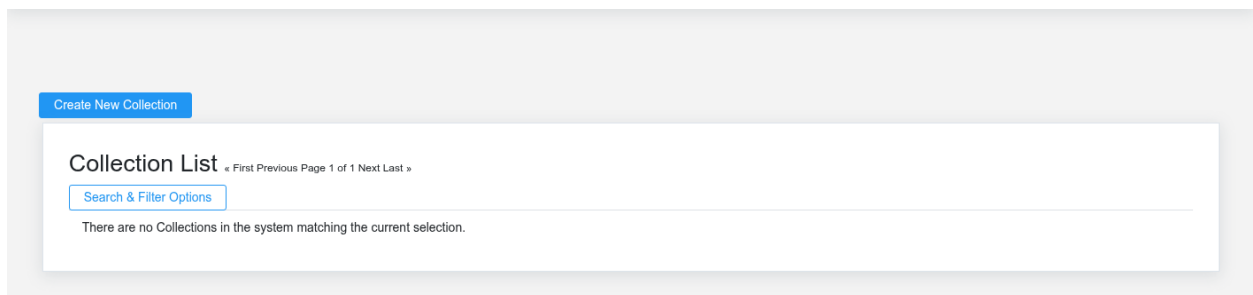
Edit an existing Collection

Edit this Collection 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 **Store** with the supporting document or approved request.
2. Recheck **Is Published**. These values are most likely to change storefront visibility, customer communication, payment, or fulfillment.
3. Save the change, return to the list, and confirm that the Collection now appears under the expected **Is Published**.

After the change: Verify this Collection in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review collections



The Collections list screen in the Brisk documentation demo.

Use the Collections list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Store**.

- Keyword search checks **Name**, **Slug**, and **Description**.
- Narrow the list with **Store** filters.
- The initial order emphasizes **Name**, and **Sort Order**. Select a column heading when you need a different comparison.

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

Fields and business rules

Brisk stores 8 user-relevant fields for this Collection, 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
Store	Yes	The store associated with this collection.
Name	Yes	Human-readable name for this collection.
Slug	No	URL-safe identifier for this collection.
Description	No	Description of this collection.
Featured Image	No	File stored as featured image for this collection.
Is Published	No	Whether this collection is published.
Show In Navigation	No	Whether the show in navigation option applies to this collection.
Sort Order	No	The sort order value recorded for this collection.

What happens next

Verify this Collection in the next transaction or assignment screen 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 **Store**, and **Name** 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 **Is Published**, 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 **Store** 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 16:07:42 UTC by Brisk

Updated 2026-08-10 20:24:59 UTC by Brisk