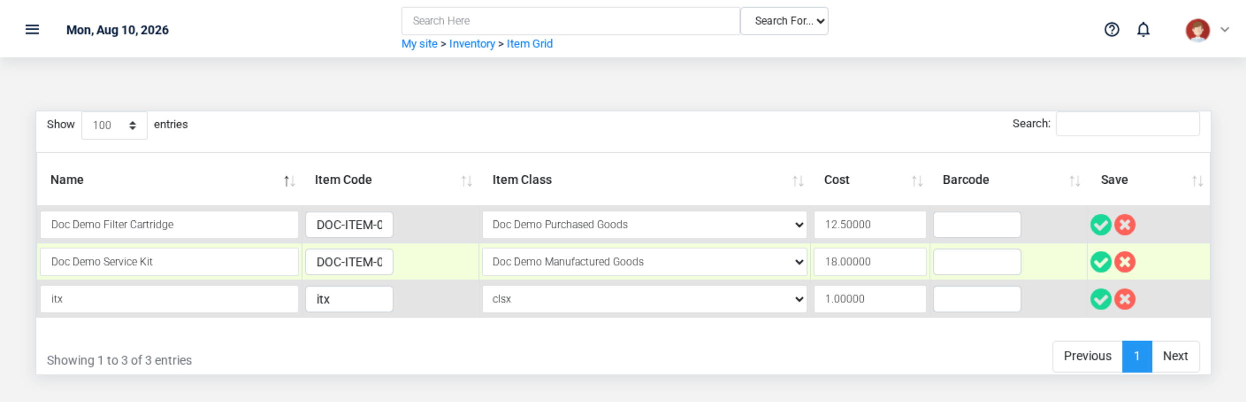
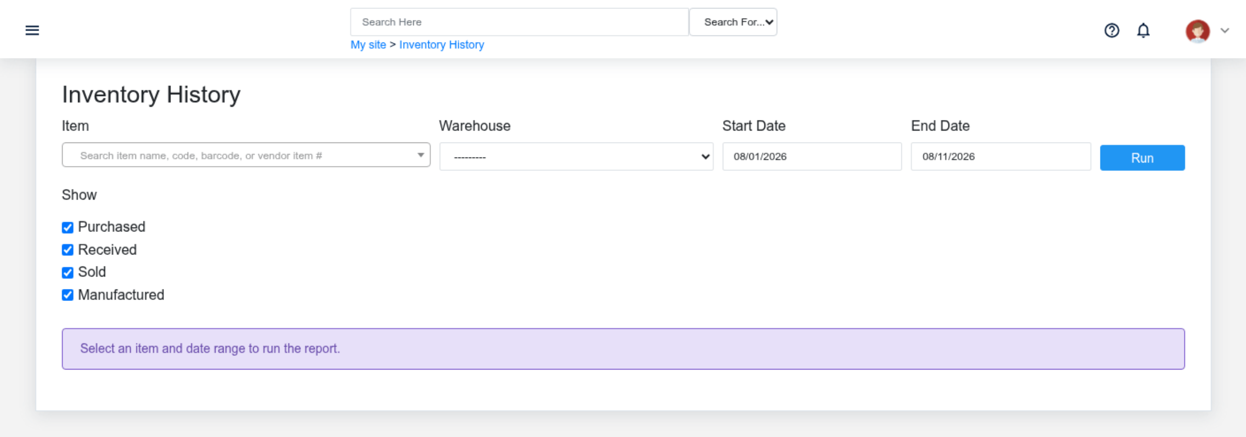
Items

Items

Purpose and when to use this record



The Items overview screen in the Brisk documentation demo.



The Items overview screen in the Brisk documentation demo.

Maintain the shared product or service definition used by purchasing, inventory, pricing, sales, and manufacturing.

At a glance

- **Identify it by: Name**, **Item Code**, **Barcode**, and **Point Of Sale Label**.

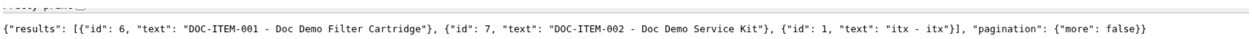
- **Check its business context: Item Class**, **Vendor**, **Location**, **Purchase Uom**, and **Sales Uom**.
- **Why care:** Warehouse, item, unit, quantity, and cost must describe the same physical movement. A wrong warehouse or unit can make availability and valuation misleading.

Before you begin

You need the Brisk permission for the action you are taking on items. 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 **Asset Account**, **Expense Account**, **Cogs Account**, **Revenue Account**, and **Default Tax** records ready first. Those selections determine where this Item belongs and which later screens can find it.

Find and review items



The Items list screen in the Brisk documentation demo.

Use the Items list to find the correct record before opening or changing it. Compare **Name**, **Item Code**, and **Barcode**. Records with similar names or numbers can still belong to different **Item Class**, **Vendor**, **Location**, **Purchase Uom**, **Sales Uom**, and **Stock Uom**, plus the remaining screen fields.

- Keyword search checks **Name**, **Description**, **Item Code**, **Vendor Item #**, and **Item Type**.
- Narrow the list with **Item Class**, **Vendor**, and **Location** filters.
- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the Item whose **Name**, **Item Code**, and **Barcode** match the task. If it is missing, clear the list filters and recheck **Item Class**, **Vendor**, **Location**, **Item Type**, **Commission Type**, and **Pricing Locked** rather than creating a replacement immediately.

Create an Item

Account, **Default Tax**, **Default UOM** (Click a setting to update it)

Save | Cancel

Item Entry - New Item

Name		Description	
Item Code		Item Type	Inventory
Item Class	-----	Cost	
Sales Price		MSRP	
Replacement Cost	0	Barcode	
Vendor	-----	Location + ↻	-----
Weight		Purchase UOM	-----
Sales UOM	-----	Stock UOM	-----
Case Cost		Case Quantity	
Reorder Quantity		Maximum Quantity	
Asset Account	-----	Expense Account	-----
COGS Account	-----	Revenue Account	-----
Default Tax	-----	Commission Type	Percentage of Gross Profit
Commission % (GP)	0	Commission Amount per $	0
Contract Restricted	☐	Pricing Locked	☐
Point Of Sale Favorite	☐	Point Of Sale Position	
Point Of Sale Label		Memo	

Item Barcodes

Barcode	Delete
	✖
	✖
	✖

Add Row

Vendor Item #S

Vendor	Vendor Item #	Delete
---------		✖
---------		✖
---------		✖

Add Row

Price Rules

Customer Class	Rule Base	Rule Value	Modifier	Value	Calculated Price	Delete
Documenta	Cost		Percent	30.00		✖
---------	---------		---------			✖

Add Row

Alternate Items

Alternate +	Delete
	✖
	✖

The Items create screen in the Brisk documentation demo.

Create an Item 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: **Item Class**, **Vendor**, **Location**, **Purchase Uom**, **Sales Uom**, and **Stock Uom**, plus the remaining screen fields.
2. Enter the required identifying and operational values: **Name**, **Cost**, **Sales Price**, **Asset Account**, **Expense Account**, and **Cogs Account**, plus the remaining screen fields.
3. Review **Item Type**, **Commission Type**, **Contract Restricted**, **Pricing Locked**, **Point Of Sale Favorite**, and **Auto-Prompt Foodservice Options**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Item, then confirm **Name**, **Item Code**, **Barcode**, and **Point Of Sale Label** on its detail page before continuing.

After saving: Verify this Item in **Adjustment Lines**, **Alternate Items**, **Ingredient Information**, and **Inventory Items Credited**, 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 an Item

Delete this Item 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 **Adjustment Lines**, **Alternate Items**, **Ingredient Information**, **Inventory Items Credited**, and **Inventory Items Recevied**, 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**, **Item Code**, **Barcode**, and **Point Of Sale Label**. After confirmation, return to the Items list and make sure only the intended Item was removed.

Review Item details

Use the detail page as the shared record of what this Item currently means. Verify **Item Type**, **Commission Type**, **Commission Amount Per Sales Uom**, and **Pricing Locked** before relying on it for a decision.

Follow **Item Class**, **Vendor**, **Location**, **Purchase Uom**, **Sales Uom**, and **Stock Uom**, plus the remaining screen fields to determine whether the issue is on this Item or on one of those linked records.

Next check: Verify this Item in **Adjustment Lines**, **Alternate Items**, **Ingredient Information**, and **Inventory Items Credited**, 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 Item

Edit this Item 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 **Item Class**, **Vendor**, **Location**, **Purchase Uom**, **Sales Uom**, and **Stock Uom**, plus the remaining screen fields with the supporting document or approved request.
2. Recheck **Item Type**, **Cost**, **Sales Price**, **Replacement Cost**, **Vendor**, and **Case Cost**, plus the remaining screen fields. These values are most likely to change warehouse availability, replenishment, quantities, and valuation.
3. Save the change, return to the list, and confirm that the Item now appears under the expected **Item Type**, **Commission Type**, and **Pricing Locked**.

After the change: Verify this Item in **Adjustment Lines**, **Alternate Items**, **Ingredient Information**, and **Inventory Items Credited**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Fields and business rules

Brisk stores 36 user-relevant fields for this Item, including 11 linked-record selections and 2 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 item.
Description	No	Description of this item.
Item Code	No	Short code used to identify this item.
Item Type	No	The item type recorded for this item. Available values: Inventory, Non-Inventory, Special Order, Service, Manufactured.

Field	Required	What it controls
Item Class	No	The item class associated with this item.
Cost	Yes	Represents the current average cost for this product in inventory. For FIFO and LIFO settings, individual transactions will use the actual cost of the inventory that is being used. Under the Average value system, this field will update automatically upon receiving. In Manual and Market settings, this field will never update automatically and will always be used for financial calculations.
Sales Price	Yes	Under default settings, this is the sales price for the item. If price scheduling is enabled, this field represents the highest active, schedueld price.
Msrp	No	The msrp value recorded for this item.
Replacement Cost	No	Used by the manufacturing system, if populated this field will override the calculated system cost for this ingredient Price/Cost updates of manufactured items.
Barcode	No	The barcode recorded for this item.
Vendor	No	The vendor associated with this item.
Location	No	The location associated with this item.
Weight	No	Weight in pounds. For accurate shipping weights to calculate, the sales Unit of Measure needs to have a correct ratio for pounds. For example, "Each" should be set to 1.0, "Ton" should be set to 2000.
Purchase Uom	No	Unit of measure used when purchasing the item from a vendor.
Sales Uom	No	Unit of measure used when selling the item to a customer.
Stock Uom	No	Unit of measure used internally for stock management.
Case Cost	No	Records the case cost of this item, in combination with case quantity, this field can be used to calculate individual item quantity.

Field	Required	What it controls
Case Quantity	No	Records the case quantity of this item, in combination with case cost. If Case Pricing is enabled, setting to this field to a value other than 0 will cause this item to behave as a bundle of items that will be unpacked into inventory by the receiving ticket. Inventory level tracking will also use case pricing.
Reorder Quantity	No	Set this value to the lowest number of items that should be in stock before reordering.
Maximum Quantity	No	Set this value to the highest number of items that should be in stock before taking action.
Asset Account	Yes	The asset account associated with this item.
Expense Account	Yes	The expense account associated with this item.
Cogs Account	Yes	The cogs account associated with this item.
Revenue Account	Yes	The revenue account associated with this item.
Default Tax	Yes	The default tax associated with this item.
Commission Type	No	Controls how salesperson commission is calculated for this item. Available values: Percentage of Gross Profit, Dollar Amount per Sales UOM.
Commission % (Gp)	No	Defines commission percentage paid to salesperson on gross profit of item sales.
Commission Amount Per Sales Uom	No	Defines fixed dollar commission paid per item sales unit of measure.
Contract Restricted	No	If this field is enabled, this item will not be sellable unless the customer has an active contract for it.
Pricing Locked	No	If this field is enabled, this item will appear as price-locked on price scheduling screens.
Point Of Sale Favorite	No	If this field is enabled, this item will have a button on the front page of the point-of-sale system.

Field	Required	What it controls
Point Of Sale Position	No	Optionally determines the order of this button on the point-of-sale favorites tab.
Point Of Sale Label	No	If this field has a value, this will be the label for the item button on the point of sale screen, which can be helpful for differentiating between items or saving space by abbreviating long item names.
Auto-Prompt Foodservice Options	No	When enabled in foodservice POS mode, the item opens its kitchen options popup immediately after it is added.
Tonnage Taxable	No	Enable for items that should be included in tonnage tax reporting when the seller is responsible for the tonnage tax.
Memo	No	The memo recorded for this item.

What happens next

Verify this Item in **Adjustment Lines**, **Alternate Items**, **Ingredient Information**, and **Inventory Items Credited**, 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**, **Cost**, **Sales Price**, **Asset Account**, **Expense Account**, and **Cogs Account**, plus the remaining screen fields 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:** Open **Item Class**, **Vendor**, **Location**, **Purchase Uom**, **Sales Uom**, and **Stock Uom**, plus the remaining screen fields from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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