Warehouses

Warehouses

Purpose and when to use this record

Define the operating locations that own inventory, transactions, defaults, and warehouse-specific accounting activity.

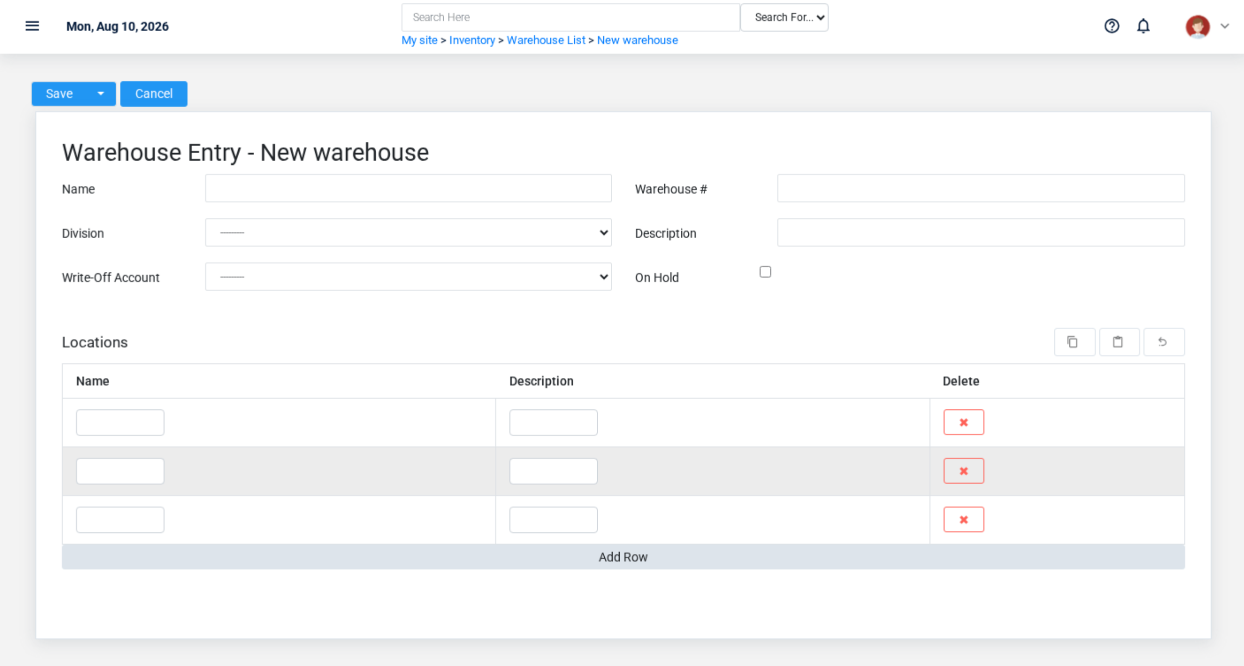
At a glance

- **Identify it by: Name**, and **Warehouse #**.
- **Check its business context: Division**, and **Write-Off Account**.
- **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 warehouses. 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 warehouse



The Warehouses create screen in the Brisk documentation demo.

Create a warehouse 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: **Division**, and **Write-Off Account**.
2. Enter the required identifying and operational values: **Name**.
3. Review **On Hold** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the warehouse, then confirm **Name**, and **Warehouse #** on its detail page before continuing.

After saving: Verify this warehouse in **Accounts**, **Deposit Balancing Transactions**, **Deposits**, and **Expense/Asset Categories**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

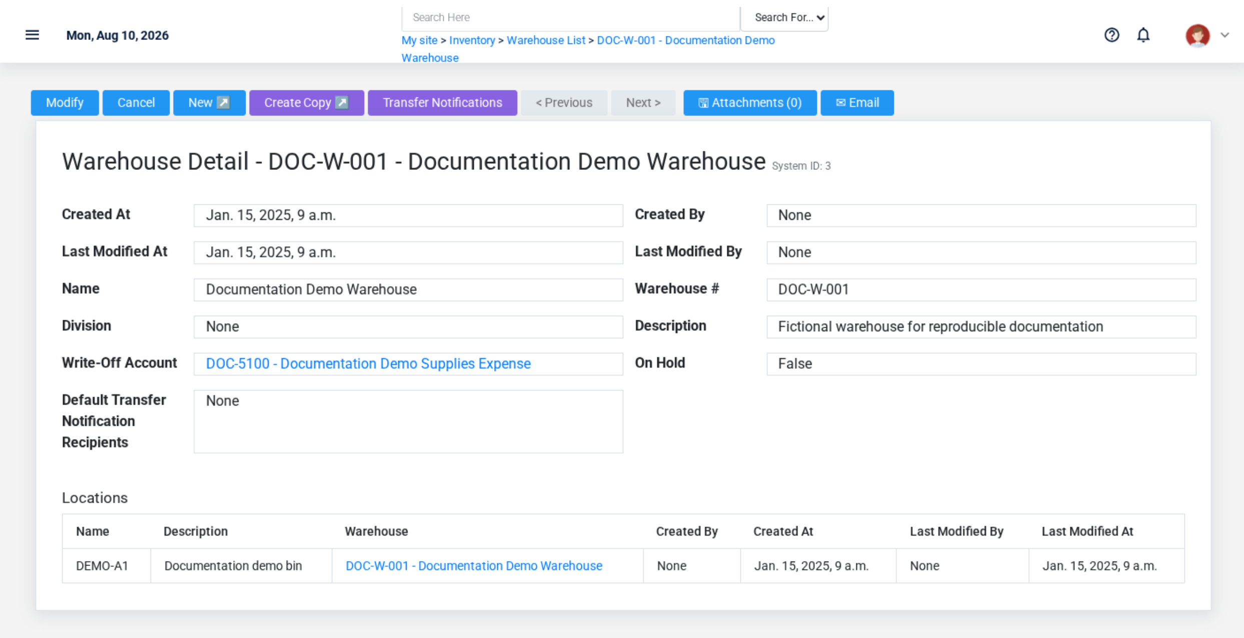
Delete a warehouse

Delete this warehouse 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 **Accounts**, **Deposit Balancing Transactions**, **Deposits**, **Expense/Asset Categories**, and **Inventory Adjustments**, 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**, and **Warehouse #**. After confirmation, return to the Warehouses list and make sure only the intended warehouse was removed.

Review warehouse details



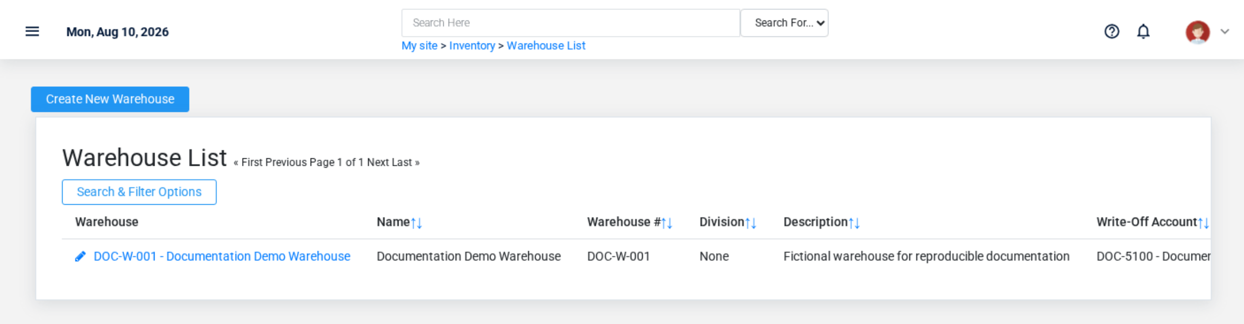
The Warehouses detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this warehouse currently means. Verify **Name**, **Warehouse #**, **Division**, and **Description** before relying on it for a decision.

Follow **Division**, and **Write-Off Account** to determine whether the issue is on this warehouse or on one of those linked records.

Next check: Verify this warehouse in **Accounts**, **Deposit Balancing Transactions**, **Deposits**, and **Expense/Asset Categories**, 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 warehouses



The Warehouses list screen in the Brisk documentation demo.

Use the Warehouses list to find the correct record before opening or changing it. Compare **Name**, and **Warehouse #**. Records with similar names or numbers can still belong to different **Division**, and **Write-Off Account**.

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

Open the warehouse whose **Name**, and **Warehouse #** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Edit an existing warehouse

Edit this warehouse 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 **Division**, and **Write-Off Account** with the supporting document or approved request.
2. Recheck **Warehouse #**. 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 warehouse now appears under the expected **Name**, and **Warehouse #**.

After the change: Verify this warehouse in **Accounts**, **Deposit Balancing Transactions**, **Deposits**, and **Expense/Asset Categories**, 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 6 user-relevant fields for this warehouse, including 2 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 warehouse.
Warehouse #	No	A warehouse's numeric designation.
Division	No	The division associated with this warehouse.
Description	No	Description of this warehouse.

Field	Required	What it controls
Write-Off Account	No	The write-off account associated with this warehouse.
On Hold	No	If enabled, items stored in this warehouse will be considered "On Hold" and will not be considered toward the reorder quantity.

What happens next

Verify this warehouse in **Accounts**, **Deposit Balancing Transactions**, **Deposits**, and **Expense/Asset Categories**, 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 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 **Division**, and **Write-Off Account** 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 16:08:12 UTC by Brisk
Updated 2026-08-10 20:26:13 UTC by Brisk