

Sheriff Source Codes

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Purpose and when to use this record

Maintain standardized revenue or receipt-source codes for sheriff collections and reporting.

At a glance

- **Identify it by:** **Source Code**, **Name**, and **Accounting Code**.
- **Check its business context:** **Balancing Account**.
- **Why care:** Use the agency's approved terminology and access policy. Preserve dates, responsible personnel, case links, and audit history because these records may support official reporting or custody review.
- **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 sheriff source codes. 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 Sheriff Source Code

The screenshot shows a web application interface for creating a new Sheriff Source Code. At the top, there is a navigation bar with a date 'Mon, Aug 10, 2026', a search bar, and a user profile icon. Below the navigation bar, there is a breadcrumb trail: 'My site > Law Enforcement > Sheriff Source Code List > New Sheriff Source Code'. The main form is titled 'Sheriff Source Code Entry - New Sheriff Source Code'. It contains several input fields: 'Source Code', 'Name', 'Active' (a checkbox that is checked), 'Default Amount', 'Balancing Account' (a dropdown menu), 'Accounting Code', and 'Notes' (a text area). At the top of the form, there are buttons for 'Save', 'Cancel', '< Previous', and 'Next >'.

The Sheriff Source Codes create screen in the Brisk documentation demo.

Create a Sheriff Source Code only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Balancing Account**.
2. Enter the required identifying and operational values: **Source Code**, and **Name**.
3. Review **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Sheriff Source Code, then confirm **Source Code**, **Name**, and **Accounting Code** on its detail page before continuing.

After saving: Open **Sheriff Receipt Lines**, and **Sheriff Receipts** and confirm the Sheriff Source Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Sheriff Source Code

Delete this Sheriff Source Code 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 **Sheriff Receipt Lines**, and **Sheriff Receipts**. 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 **Source Code**, **Name**, and **Accounting Code**. After confirmation, return to the Sheriff Source Codes list and make sure only the intended Sheriff Source Code was removed.

Review Sheriff Source Code details

Use the detail page as the shared record of what this Sheriff Source Code currently means. Verify **Active**, and **Default Amount** before relying on it for a decision.

Follow **Balancing Account** to determine whether the issue is on this Sheriff Source Code or on one of those linked records.

Next check: Open **Sheriff Receipt Lines**, and **Sheriff Receipts** and confirm the Sheriff Source Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

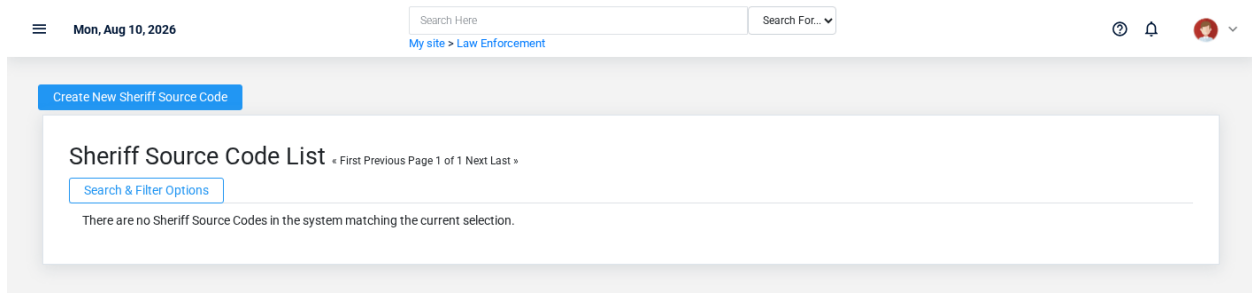
Edit an existing Sheriff Source Code

Edit this Sheriff Source Code when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Balancing Account** with the supporting document or approved request.
2. Recheck **Active**, **Default Amount**, **Balancing Account**, and **Accounting Code**. These values are most likely to change case history, custody, dispatch, official reporting, or audit review.
3. Save the change, return to the list, and confirm that the Sheriff Source Code now appears under the expected **Active**.

After the change: Open **Sheriff Receipt Lines**, and **Sheriff Receipts** and confirm the Sheriff Source Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review sheriff source codes



The Sheriff Source Codes list screen in the Brisk documentation demo.

Use the Sheriff Source Codes list to find the correct record before opening or changing it. Compare **Source Code**, **Name**, and **Accounting Code**. Records with similar names or numbers can still belong to different **Balancing Account**.

- Keyword search checks **Source Code**, **Name**, **Accounting Code**, and **Notes**.
- Narrow the list with **Balancing Account** filters.

Open the Sheriff Source Code whose **Source Code**, **Name**, and **Accounting Code** match the task. If it is missing, clear the list filters and recheck **Balancing Account**, and **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 7 user-relevant fields for this Sheriff Source Code, 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
Source Code	Yes	Short code used to identify this sheriff source code.
Name	Yes	Human-readable name for this sheriff source code.
Active	No	Whether this sheriff source code is active and available for use.
Default Amount	No	The default amount value recorded for this sheriff source code.
Balancing Account	No	G/L account credited when receipts are posted for this source code.
Accounting Code	No	The accounting code recorded for this sheriff source code.
Notes	No	Additional internal notes about this sheriff source code.

What happens next

Open **Sheriff Receipt Lines**, and **Sheriff Receipts** and confirm the Sheriff Source Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Source Code**, 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 **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:** Open **Balancing Account** 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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