Divisions

Divisions

Purpose and when to use this record

Separate business activity into reporting or operational divisions used by employees, customers, inventory, and transactions.

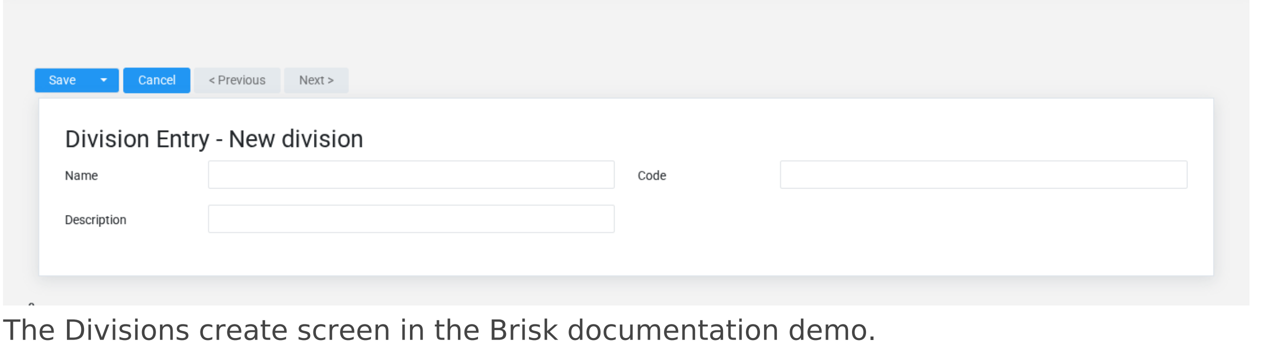
At a glance

- **Identify it by: Name**, and **Code**.
- **Why care:** These master records supply defaults and choices to later transactions. Correct duplicates and inactive records before staff build more activity on the wrong record.

Before you begin

You need the Brisk permission for the action you are taking on divisions. 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 division



The Divisions create screen in the Brisk documentation demo.

Create a division 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**.
3. Review **Code**, and **Description** against the source document or approved setup decision.
4. Save the division, then confirm **Name**, and **Code** on its detail page before continuing.

After saving: Verify this division in **Customers**, **Price Schedule Items**, **Price Schedules**, and **Warehouses** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a division

Delete this division 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 **Customers**, **Price Schedule Items**, **Price Schedules**, and **Warehouses**. 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 **Code**. After confirmation, return to the Divisions list and make sure only the intended division was removed.

Review division details

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

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

Next check: Verify this division in **Customers**, **Price Schedule Items**, **Price Schedules**, and **Warehouses** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

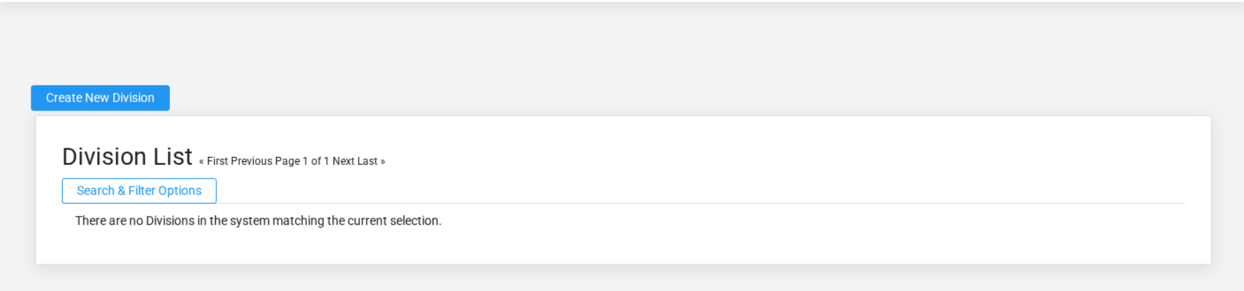
Edit an existing division

Edit this division 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**, and **Code** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change future transactions, defaults, assignment, pricing, and reporting.
3. Save the change, return to the list, and confirm that the division now appears under the expected **Name**, and **Code**.

After the change: Verify this division in **Customers**, **Price Schedule Items**, **Price Schedules**, and **Warehouses** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review divisions



The Divisions list screen in the Brisk documentation demo.

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

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

Open the division whose **Name**, and **Code** 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.

Fields and business rules

Brisk stores 3 user-relevant fields for this division, 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 division.

Field	Required	What it controls
Code	No	Short code used to identify this division.
Description	No	Description of this division.

What happens next

Verify this division in **Customers**, **Price Schedule Items**, **Price Schedules**, and **Warehouses** 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:** Compare this division with the source document or approved setup decision, then check the downstream screen where it is used.

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