

Nav Cards

Nav Cards

Purpose and when to use this record

Group related navigation links into a dashboard card and control its label, icon, order, and availability.

At a glance

- **Identify it by: Title.**
- **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 nav cards. 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 nav card

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Search Here

Search For...

My site > Management > Nav Card List > New nav card

Save Cancel

Nav Card Entry - New nav card

Title

Nav Link-Card Relations

Position	Link	Delete
Add Row		

Nav Card-Dashboard Assignments

Position	Dashboard	Delete
Add Row		

The Nav Cards create screen in the Brisk documentation demo.

Create a nav card 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.
2. Enter the required identifying and operational values: **Title**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the nav card, then confirm **Title** on its detail page before continuing.

After saving: Open **Nav Card-Dashboard Assignments**, and **Nav Link-Card Relations** and confirm the nav card 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 nav card

Delete this nav card 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 **Nav Card-Dashboard Assignments**, and **Nav Link-Card Relations**. 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 **Title**. After confirmation, return to the Nav Cards list and make sure only the intended nav card was removed.

Review nav card details

Use the detail page as the shared record of what this nav card currently means. Verify **Title** before relying on it for a decision.

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

Next check: Open **Nav Card-Dashboard Assignments**, and **Nav Link-Card Relations** and confirm the nav card appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

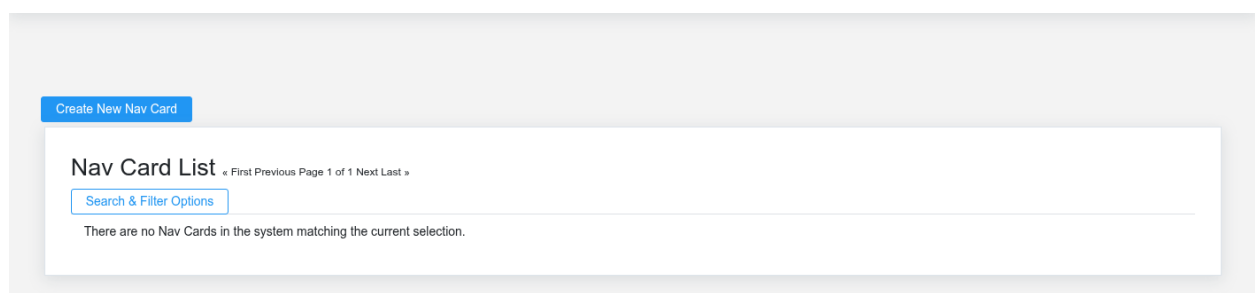
Edit an existing nav card

Edit this nav card 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 the identifying information shown on the screen 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 nav card now appears under the expected the identifying information shown on the screen.

After the change: Open **Nav Card-Dashboard Assignments**, and **Nav Link-Card Relations** and confirm the nav card 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 nav cards



The Nav Cards list screen in the Brisk documentation demo.

Use the Nav Cards list to find the correct record before opening or changing it. Compare **Title**. Compare the full identifier rather than relying on a similar name.

Open the nav card whose **Title** 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 1 user-relevant fields for this nav card, 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
Title	Yes	The title used for the card.

What happens next

Open **Nav Card-Dashboard Assignments**, and **Nav Link-Card Relations** and confirm the nav card 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 **Title** 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 nav card with the source document or approved setup decision, then check the downstream screen where it is used.