Compliance Tasks

Compliance Tasks

Purpose and when to use this record

Assign and track an inspection, document, renewal, or follow-up obligation for a municipal business or license.

At a glance

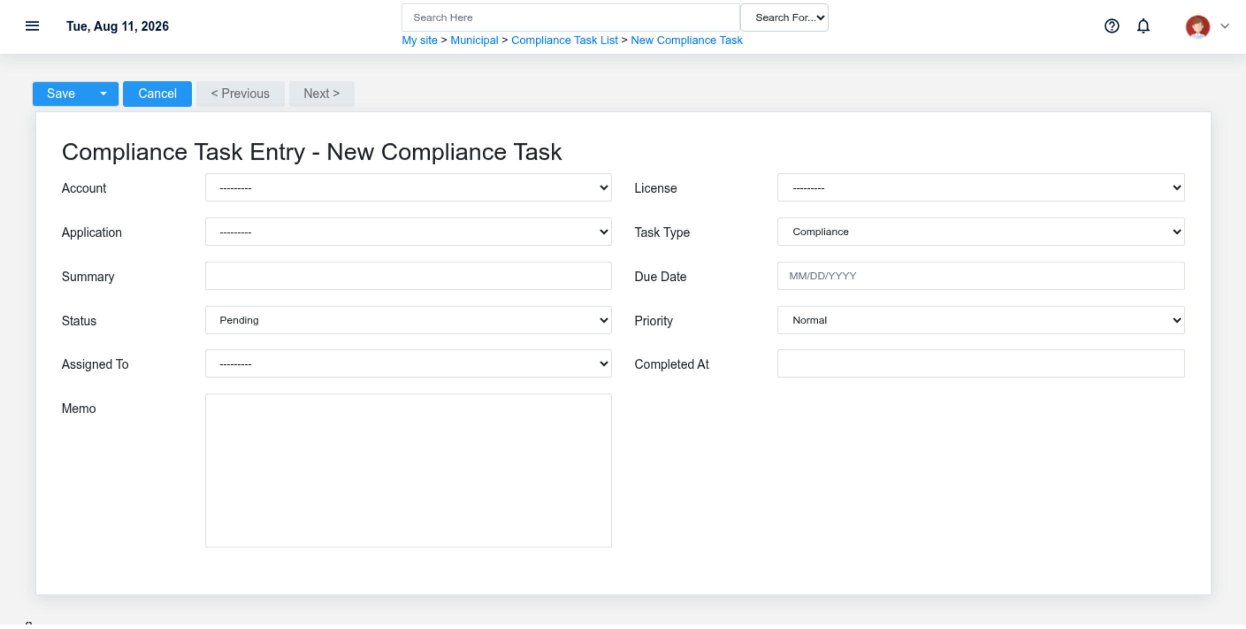
- **Identify it by: Due Date**, and **Status**.
- **Check its business context: Account**, **License**, **Application**, and **Assigned To**.
- **Why care:** Names, periods, classifications, due dates, status, charges, and payments form an official account history. Correct them from the supporting filing, application, receipt, or ordinance.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on compliance tasks. 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 **Account** records ready first. Those selections determine where this Compliance Task belongs and which later screens can find it.

Create a Compliance Task



The Compliance Tasks create screen in the Brisk documentation demo.

Create a Compliance Task only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Account**, **License**, **Application**, and **Assigned To**.
2. Enter the required identifying and operational values: **Account**, and **Summary**.
3. Review **Task Type**, **Status**, and **Priority** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Compliance Task, then confirm **Due Date**, and **Status** on its detail page before continuing.

After saving: Verify **Task Type**, **Status**, **Priority**, **Account**, **License**, and **Application**, plus the remaining screen fields on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

Delete a Compliance Task

Delete this Compliance Task only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

On the confirmation page, verify **Due Date**, and **Status**. After confirmation, return to the Compliance Tasks list and make sure only the intended Compliance Task was removed.

Review Compliance Task details

Use the detail page as the shared record of what this Compliance Task currently means. Verify **Task Type**, **Due Date**, **Status**, and **Priority** before relying on it for a decision.

Follow **Account**, **License**, **Application**, and **Assigned To** to determine whether the issue is on this Compliance Task or on one of those linked records.

Next check: Verify **Task Type**, **Status**, **Priority**, **Account**, **License**, and **Application**, plus the remaining screen fields on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

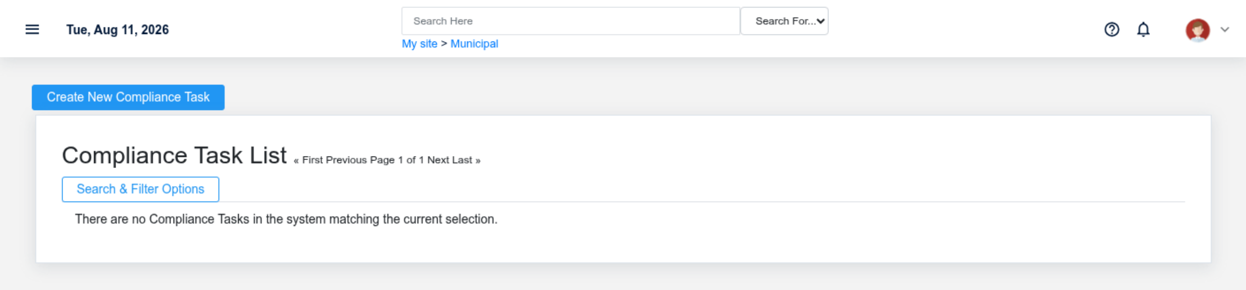
Edit an existing Compliance Task

Edit this Compliance Task to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Account**, **License**, **Application**, and **Assigned To** with the supporting document or approved request.
2. Recheck **Account**, **Task Type**, **Due Date**, **Status**, and **Priority**. These values are most likely to change license, compliance, filing, charge, payment, and official account history.
3. Save the change, return to the list, and confirm that the Compliance Task now appears under the expected **Task Type**, **Status**, and **Priority**.

After the change: Verify **Task Type**, **Status**, **Priority**, **Account**, **License**, and **Application**, plus the remaining screen fields on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

Find and review compliance tasks



The Compliance Tasks list screen in the Brisk documentation demo.

Use the Compliance Tasks list to find the correct record before opening or changing it. Compare **Due Date**, and **Status**. Records with similar names or numbers can still belong to different **Account**, **License**, **Application**, and **Assigned To**.

- The initial order emphasizes **Status**, **Due Date**, and **Priority**. Select a column heading when you need a different comparison.

Open the Compliance Task whose **Due Date**, and **Status** match the task. If it is missing, clear the list filters and recheck **Task Type**, **Status**, and **Priority** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this Compliance Task, including 4 linked-record selections and 3 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Account	Yes	The account associated with this compliance task.
License	No	The license associated with this compliance task.
Application	No	The application associated with this compliance task.
Task Type	No	The task type recorded for this compliance task. Available values: Renewal, Compliance, Inspection, Follow-Up.
Summary	Yes	The summary recorded for this compliance task.
Due Date	No	Date recorded for due date on this compliance task.
Status	No	Current status of this compliance task. Available values: Pending, In Progress, Completed, Cancelled.
Priority	No	The priority recorded for this compliance task. Available values: Low, Normal, High.
Assigned To	No	The assigned to associated with this compliance task.
Completed At	No	Date and time recorded for completed at on this compliance task.
Memo	No	The memo recorded for this compliance task.

What happens next

Verify **Task Type**, **Status**, **Priority**, **Account**, **License**, and **Application**, plus the remaining screen fields on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Account**, and **Summary** 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 **Task Type**, **Status**, and **Priority**, 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 **Account**, **License**, **Application**, and **Assigned To** 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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