

License Applications

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Purpose and when to use this record

Receive and review a business's request for a municipal license before approval, rejection, or conversion to an issued license.

At a glance

- **Identify it by:** **Application Number**, **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date**.
- **Check its business context:** **Account**, **License Type**, and **Reviewed By**.
- **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 license applications. 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**, and **License Type** records ready first. Those selections determine where this License Application belongs and which later screens can find it.

Create a License Application

The screenshot shows a web application interface for creating a new license application. At the top, there's a navigation bar with a date 'Tue, Aug 11, 2026', a search bar, and a user profile icon. Below the navigation bar, there's a breadcrumb trail: 'My site > Municipal > License Application List > New License Application'. The main form is titled 'License Application Entry - New License Application'. It has a header with 'Save', 'Cancel', '< Previous', and 'Next >' buttons. The form fields are arranged in two columns. The left column contains 'Account' (a dropdown menu), 'Application Number' (a text field with 'DRAFT'), 'Submitted Date' (a date field with 'MM/DD/YYYY'), 'Review Due Date' (a date field with 'MM/DD/YYYY'), and a 'Memo' field (a large text area). The right column contains 'License Type' (a dropdown menu), 'Status' (a dropdown menu with 'Draft'), 'Requested Effective Date' (a date field with 'MM/DD/YYYY'), and 'Reviewed By' (a dropdown menu). The form is set to 'Draft' status and 'DRAFT' application number.

The License Applications create screen in the Brisk documentation demo.

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

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

After saving: Complete the required review and fees before approval; an approved application should lead to the correct issued license rather than a duplicate business record.

Delete a License Application

Delete this License Application 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.

Before confirming, check for related **Compliance Tasks**, **Licenses**, and **Municipal Charges**. 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 **Application Number**, **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date**. After confirmation, return to the License Applications list and make sure only the intended License Application was removed.

Review License Application details

Use the detail page as the shared record of what this License Application currently means. Verify **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date** before relying on it for a decision.

Follow **Account**, **License Type**, and **Reviewed By** to determine whether the issue is on this License Application or on one of those linked records.

Next check: Complete the required review and fees before approval; an approved application should lead to the correct issued license rather than a duplicate business record.

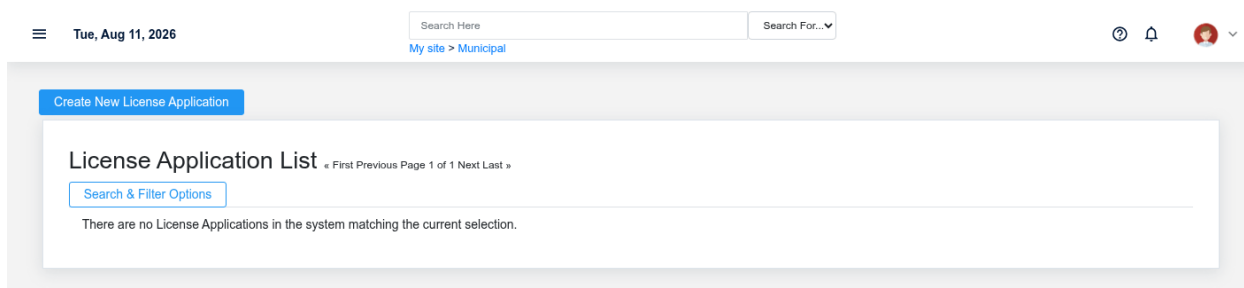
Edit an existing License Application

Edit this License Application 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 Type**, and **Reviewed By** with the supporting document or approved request.
2. Recheck **Account**, **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date**. 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 License Application now appears under the expected **Status**.

After the change: Complete the required review and fees before approval; an approved application should lead to the correct issued license rather than a duplicate business record.

Find and review license applications



The License Applications list screen in the Brisk documentation demo.

Use the License Applications list to find the correct record before opening or changing it. Compare **Application Number**, **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date**. Records with similar names or numbers can still belong to different **Account**, **License Type**,

and **Reviewed By**.

- The initial order emphasizes **Submitted Date**, and **Id**. Select a column heading when you need a different comparison.

Open the License Application whose **Application Number**, **Status**, **Submitted Date**, **Requested Effective Date**, and **Review Due Date** match the task. If it is missing, clear the list filters and recheck **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this License Application, including 3 linked-record selections and 1 controlled-choice field. 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 license application.
License Type	Yes	The license type associated with this license application.
Application Number	Yes	The application number recorded for this license application.
Status	No	Current status of this license application. Available values: Draft, Submitted, In Review, Approved, Denied, Converted.
Submitted Date	No	Date recorded for submitted date on this license application.
Requested Effective Date	No	Date recorded for requested effective date on this license application.
Review Due Date	No	Date recorded for review due date on this license application.
Reviewed By	No	The reviewed by associated with this license application.
Memo	No	The memo recorded for this license application.

What happens next

Complete the required review and fees before approval; an approved application should lead to the correct issued license rather than a duplicate business record.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Account**, **License Type**, and **Application Number** 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 **Status**, 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 Type**, and **Reviewed By** 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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