License Types

License Types

Purpose and when to use this record

Define the available municipal license categories, their terms, fees, renewal behavior, and required information.

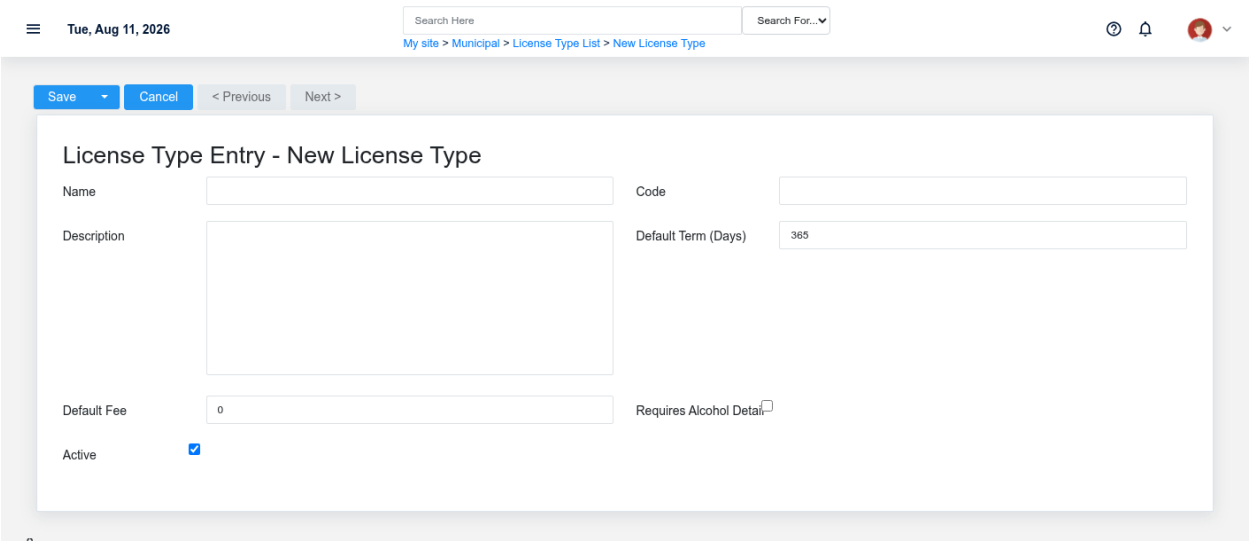
At a glance

- **Identify it by: Name**, and **Code**.
- **Check its business context: Revenue Account**.
- **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:** 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 license types. 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 License Type



The License Types create screen in the Brisk documentation demo.

Create a License Type 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: **Revenue Account**.
2. Enter the required identifying and operational values: **Name**.
3. Review **Requires Alcohol Detail**, and **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the License Type, then confirm **Name**, and **Code** on its detail page before continuing.

After saving: Open **License Applications**, and **Licenses** and confirm the License Type 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 License Type

Delete this License Type 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 **License Applications**, and **Licenses**. 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 License Types list and make sure only the intended License Type was removed.

Review License Type details

Use the detail page as the shared record of what this License Type currently means. Verify **Active** before relying on it for a decision.

Follow **Revenue Account** to determine whether the issue is on this License Type or on one of those linked records.

Next check: Open **License Applications**, and **Licenses** and confirm the License Type appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

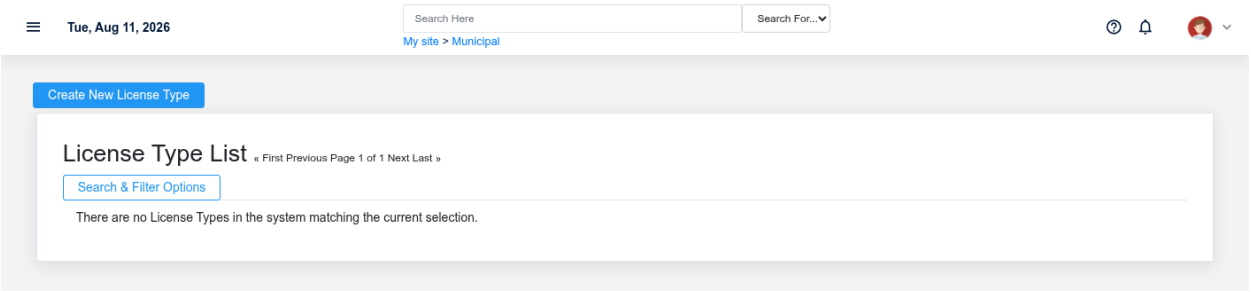
Edit an existing License Type

Edit this License Type 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 **Revenue Account** with the supporting document or approved request.
2. Recheck **Revenue Account**, and **Active**. 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 Type now appears under the expected **Active**.

After the change: Open **License Applications**, and **Licenses** and confirm the License Type 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 license types



The License Types list screen in the Brisk documentation demo.

Use the License Types list to find the correct record before opening or changing it. Compare **Name**, and **Code**. Records with similar names or numbers can still belong to different **Revenue Account**.

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

Open the License Type whose **Name**, and **Code** match the task. If it is missing, clear the list filters and recheck **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 8 user-relevant fields for this License Type, 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
Name	Yes	Human-readable name for this license type.
Code	No	Short code used to identify this license type.
Description	No	Description of this license type.
Default Term (Days)	No	The default term (days) value recorded for this license type.
Default Fee	No	The default fee value recorded for this license type.
Requires Alcohol Detail	No	Whether the requires alcohol detail option applies to this license type.
Revenue Account	No	Optional income account override used when posting municipal charges to accounting.
Active	No	Whether this license type is active and available for use.

What happens next

Open **License Applications**, and **Licenses** and confirm the License Type 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 **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 **Revenue Account** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3
Created 2026-08-10 16:09:17 UTC by Brisk
Updated 2026-08-10 20:29:07 UTC by Brisk