

Licenses

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Purpose and when to use this record

Maintain an issued municipal license, its business, type, effective dates, status, conditions, and renewal history.

At a glance

- **Identify it by:** **License Number**, **Status**, **Issued Date**, **Effective Date**, and **Expiration Date**.
- **Check its business context:** **Account**, **License Type**, and **Source Application**.
- **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 licenses. 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 belongs and which later screens can find it.

Create a License

The Licenses create screen in the Brisk documentation demo.

Create a License 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 **Source Application**.
2. Enter the required identifying and operational values: **Account**, **License Type**, and **License Number**.
3. Review **Status**, and **Auto-Renew** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the License, then confirm **License Number**, **Status**, **Issued Date**, **Effective Date**, and **Expiration Date** on its detail page before continuing.

After saving: Schedule renewal and compliance work from the effective and expiration dates, and keep related payments and conditions with this license.

Delete a License

Delete this License 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 **Alcohol License Details**, **Compliance Tasks**, 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 **License Number**, **Status**, **Issued Date**, **Effective Date**, and **Expiration Date**. After confirmation, return to the Licenses list and make sure only the intended License was removed.

Review License details

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

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

Next check: Schedule renewal and compliance work from the effective and expiration dates, and keep related payments and conditions with this license.

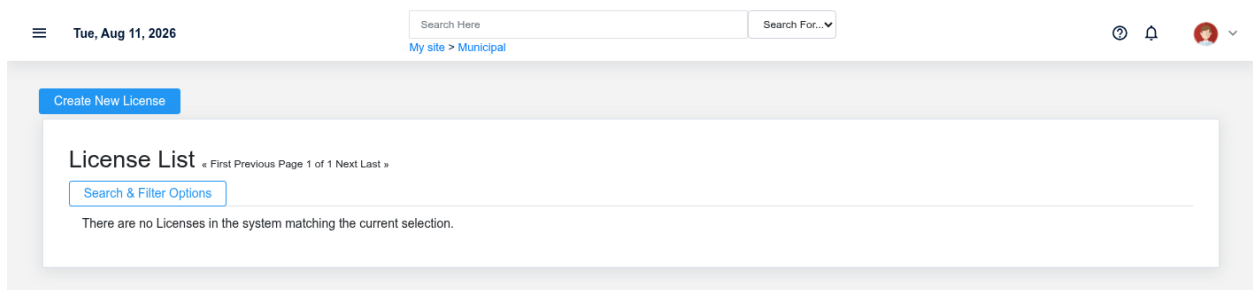
Edit an existing License

Edit this License 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 **Source Application** with the supporting document or approved request.
2. Recheck **Account**, **Status**, **Issued Date**, **Effective Date**, and **Expiration 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 now appears under the expected **Status**.

After the change: Schedule renewal and compliance work from the effective and expiration dates, and keep related payments and conditions with this license.

Find and review licenses



The Licenses list screen in the Brisk documentation demo.

Use the Licenses list to find the correct record before opening or changing it. Compare **License Number**, **Status**, **Issued Date**, **Effective Date**, and **Expiration Date**. Records with similar names or numbers can still belong to different **Account**, **License Type**, and **Source Application**.

- The initial order emphasizes **Expiration Date**, and **License Number**. Select a column heading when you need a different comparison.

Open the License whose **License Number**, **Status**, **Issued Date**, **Effective Date**, and **Expiration 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 11 user-relevant fields for this License, 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.
License Type	Yes	The license type associated with this license.
Source Application	No	The source application associated with this license.
License Number	Yes	The license number recorded for this license.
Status	No	Current status of this license. Available values: Active, Suspended, Expired, Revoked, Closed.
Issued Date	No	Date recorded for issued date on this license.
Effective Date	No	Date recorded for effective date on this license.
Expiration Date	No	Date recorded for expiration date on this license.
Auto-Renew	No	Whether the auto-renew option applies to this license.
Renewal Lead Days	No	The renewal lead days value recorded for this license.
Memo	No	The memo recorded for this license.

What happens next

Schedule renewal and compliance work from the effective and expiration dates, and keep related payments and conditions with this license.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Account**, **License Type**, and **License 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 **Source Application** 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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