Local Tax Filings

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Purpose and when to use this record

Record a local tax return for the filing period, reported basis, tax due, adjustments, and payment state.

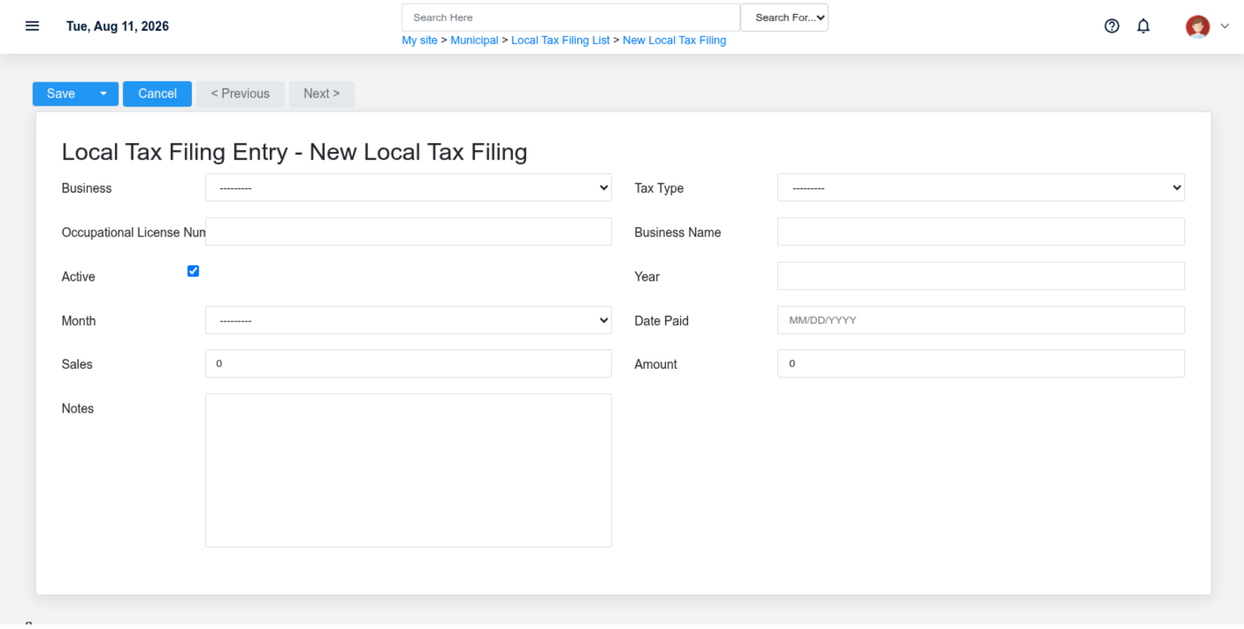
At a glance

- **Identify it by: Occupational License Number**, **Business Name**, and **Date Paid**.
- **Check its business context: Business**.
- **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 local tax filings. 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 Local Tax Filing



The Local Tax Filings create screen in the Brisk documentation demo.

Create a Local Tax Filing only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Business**.
2. Enter the required identifying and operational values: **Tax Type**.
3. Review **Tax Type**, **Active**, and **Month** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Local Tax Filing, then confirm **Occupational License Number**, **Business Name**, and **Date Paid** on its detail page before continuing.

After saving: Compare the calculated amount due with payments and credits, then follow up on any remaining balance or late status.

Delete a Local Tax Filing

Delete this Local Tax Filing 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.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

On the confirmation page, verify **Occupational License Number**, **Business Name**, and **Date Paid**. After confirmation, return to the Local Tax Filings list and make sure only the intended Local Tax Filing was removed.

Review Local Tax Filing details

Use the detail page as the shared record of what this Local Tax Filing currently means. Verify **Tax Type**, **Active**, **Month**, **Date Paid**, and **Amount** before relying on it for a decision.

Follow **Business** to determine whether the issue is on this Local Tax Filing or on one of those linked records.

Next check: Compare the calculated amount due with payments and credits, then follow up on any remaining balance or late status.

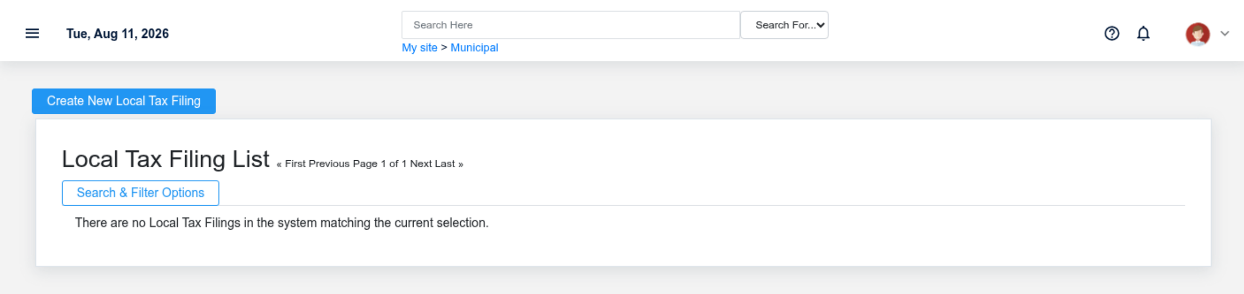
Edit an existing Local Tax Filing

Edit this Local Tax Filing 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 **Business** with the supporting document or approved request.
2. Recheck **Tax Type**, **Active**, **Month**, **Date Paid**, and **Amount**. 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 Local Tax Filing now appears under the expected **Tax Type**, **Active**, **Month**, and **Date Paid**.

After the change: Compare the calculated amount due with payments and credits, then follow up on any remaining balance or late status.

Find and review local tax filings



The Local Tax Filings list screen in the Brisk documentation demo.

Use the Local Tax Filings list to find the correct record before opening or changing it. Compare **Occupational License Number**, **Business Name**, and **Date Paid**. Records with similar names or numbers can still belong to different **Business**.

- Keyword search checks **Business Name**, **Tax Type**, and **Month**.
- The initial order emphasizes **Tax Type**, **Year**, **Month**, and **Business Name**. Select a column heading when you need a different comparison.

Open the Local Tax Filing whose **Occupational License Number**, **Business Name**, and **Date Paid** match the task. If it is missing, clear the list filters and recheck **Tax Type**, **Active**, **Month**, and **Date Paid** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this Local Tax Filing, including 1 linked-record selection and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Business	No	The business associated with this local tax filing.
Tax Type	Yes	The tax type recorded for this local tax filing. Available values: Restaurant, Room.
Occupational License Number	No	The occupational license number value recorded for this local tax filing.
Business Name	No	The business name recorded for this local tax filing.
Active	No	Whether this local tax filing is active and available for use.
Year	No	The year value recorded for this local tax filing.
Month	No	The month recorded for this local tax filing. Available values: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec.
Date Paid	No	Date recorded for date paid on this local tax filing.
Sales	No	The sales value recorded for this local tax filing.
Amount	No	The amount value recorded for this local tax filing.
Notes	No	Additional internal notes about this local tax filing.

What happens next

Compare the calculated amount due with payments and credits, then follow up on any remaining balance or late status.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Tax Type** 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 **Tax Type**, **Active**, **Month**, and **Date Paid**, 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 **Business** 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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