

Payroll Runs

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Purpose and when to use this record

Review a payroll processing cycle, its pay period, employees, calculated totals, status, and posting state.

At a glance

- **Identify it by:** **Pay Date**, and **Status**.
- **Why care:** Payroll setup and run state affect employee pay, taxes, and accounting. Restrict changes to authorized payroll staff and verify them against the approved pay-period records.
- **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 payroll runs. 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 Payroll Run

The Payroll Runs create screen in the Brisk documentation demo.

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

1. Select the business context first.
2. Enter the required identifying and operational values: **Period Start**, **Period End**, and **Pay Date**.
3. Review **Status** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Payroll Run, then confirm **Pay Date**, and **Status** on its detail page before continuing.

After saving: Review employee-level earnings, deductions, taxes, and net pay before posting; after posting, use the correction or reversal process instead of silently changing history.

Find and review payroll runs

The Payroll Runs list screen in the Brisk documentation demo.

Use the Payroll Runs list to find the correct record before opening or changing it. Compare **Pay Date**, and **Status**. Compare the full identifier rather than relying on a similar name.

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

Open the Payroll Run whose **Pay Date**, and **Status** 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 5 user-relevant fields for this Payroll Run, including 0 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
Period Start	Yes	Date recorded for period start on this payroll run.
Period End	Yes	Date recorded for period end on this payroll run.
Pay Date	Yes	Date recorded for pay date on this payroll run.
Status	No	Current status of this payroll run. Available values: Draft, Calculated, Approved, Posted.
Notes	No	Additional internal notes about this payroll run.

What happens next

Review employee-level earnings, deductions, taxes, and net pay before posting; after posting, use the correction or reversal process instead of silently changing history.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Period Start**, **Period End**, and **Pay Date** 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:** Compare this Payroll Run with the source document or approved setup decision, then check the downstream screen where it is used.

