Reports

Brisk managed documentation

Core Records

Advanced Reports

Advanced Reports

Purpose and when to use this record

Build a reusable report from selected data, filters, columns, grouping, sorting, totals, and access settings.

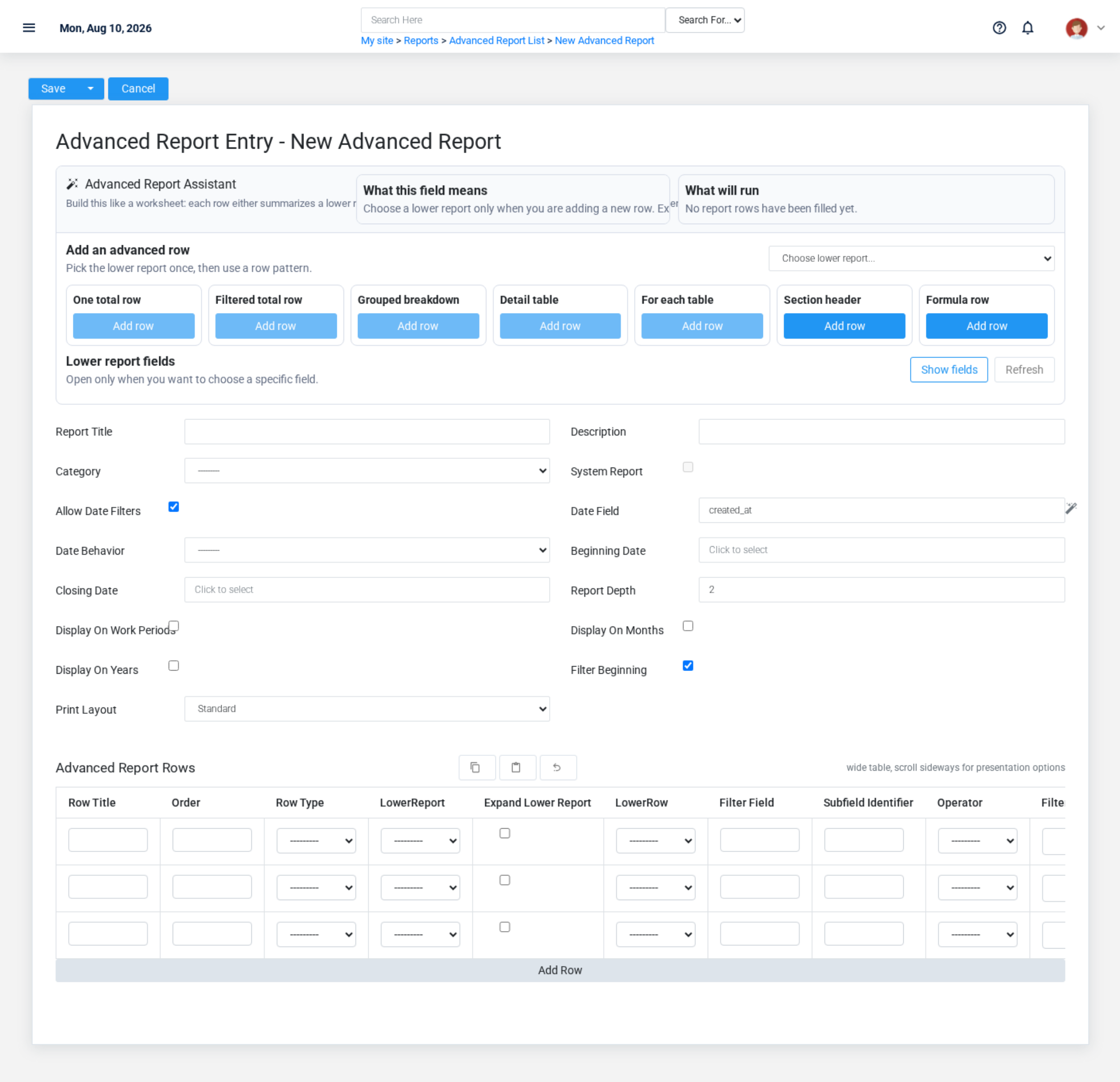
At a glance

- **Identify it by: Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on advanced reports. 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 an Advanced Report



The Advanced Reports create screen in the Brisk documentation demo.

Create an Advanced Report after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first.
2. Enter the required identifying and operational values: **Report Title**.
3. Review **Category**, **System Report**, **Allow Date Filters**, **Date Behavior**, **Display On Work Periods**, and **Display On Months**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Advanced Report, then confirm **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date** on its detail page before continuing.

After saving: Verify this Advanced Report in **Advanced Report Rows**, and **Report Charts** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete an Advanced Report

Delete this Advanced Report 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.

Before confirming, check for related **Report Charts**, and **Advanced Report Rows**. 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 **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date**. After confirmation, return to the Advanced Reports list and make sure only the intended Advanced Report was removed.

Review Advanced Report details

Use the detail page as the shared record of what this Advanced Report currently means. Verify **Category**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date**, plus the remaining screen fields before relying on it for a decision.

Compare the Advanced Report with its source document or approved setup request before deciding that it needs correction.

Next check: Verify this Advanced Report in **Advanced Report Rows**, and **Report Charts** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

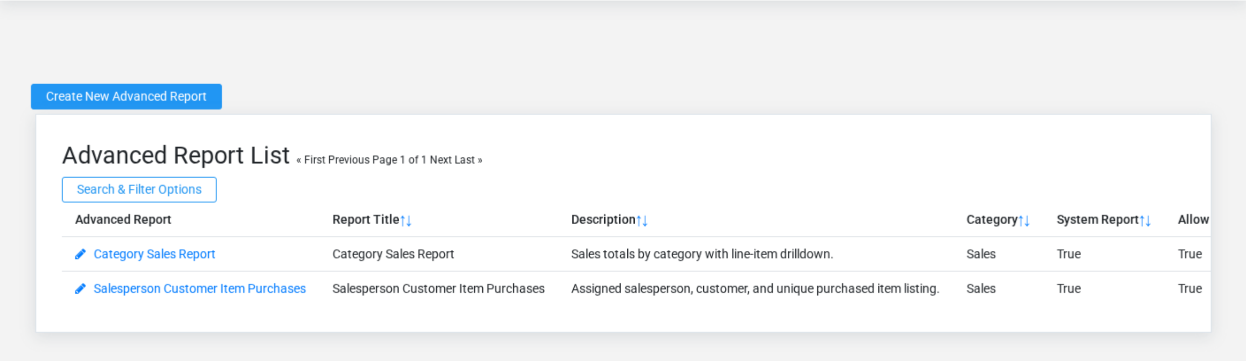
Edit an existing Advanced Report

Edit this Advanced Report to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date** with the supporting document or approved request.
2. Recheck **Category**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date**, plus the remaining screen fields. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Advanced Report now appears under the expected **Category**, **Date Behavior**, and **Print Layout**.

After the change: Verify this Advanced Report in **Advanced Report Rows**, and **Report Charts** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review advanced reports



The Advanced Reports list screen in the Brisk documentation demo.

Use the Advanced Reports list to find the correct record before opening or changing it. Compare **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date**. Compare the full identifier rather than relying on a similar name.

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

Open the Advanced Report whose **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date** match the task. If it is missing, clear the list filters and recheck **Category**, **Date Behavior**, and **Print Layout** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 15 user-relevant fields for this Advanced Report, including 0 linked-record selections and 3 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Report Title	Yes	The name or title of this report.
Description	No	Description of this advanced report.
Category	No	The category recorded for this advanced report. Available values: Accounting, Inventory, Management, Manufacturing, Sales, Financial, Favorites.

Field	Required	What it controls
System Report	No	Reports provided by Brisk are considered system reports; they can be copied but not deleted or modified.
Allow Date Filters	No	If this field is disabled, live date filters will not be available for this report.
Date Field	No	By default, the system will attempt to filter by date using the created_at field. If this field is populated, the system will attempt to filter by the provided field instead. This field is ignored if Allow Date Filters is not enabled.
Date Behavior	No	Select the initial state of the date filters on this report. Available values: All Time, Today, Yesterday, Last 7 Days, Week-to-date, Last 30 Days, Month-to-date, Last 365 Days, Year-to-date, Previous Week, Previous Week-to-day, Previous Month, Previous Month-to-date, Previous Year, Previous Year-to-date, Custom Date Range.
Beginning Date	No	Sets the start date for this report if using a custom date range.
Closing Date	No	Sets the end date for this report if using a custom date range.
Report Depth	No	This field is used to control nested report groups. Valid values are 2, 3, and 4. If a non-nested report is needed, it will need to be created separately. This value should be equal to the highest child report +1.
Display On Work Periods	No	Enable this setting to run this report directly from closed work periods.
Display On Months	No	Enable this setting to run this report directly from closed months.
Display On Years	No	Enable this setting to run this report directly from closed years.
Filter Beginning	No	If set to false, when filtering this report by date, it will only filter by the ending date, not the beginning date.
Print Layout	No	Controls optional print formatting for advanced reports. Available values: Standard, Wide Detail Table.

What happens next

Verify this Advanced Report in **Advanced Report Rows**, and **Report Charts** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Report Title** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this Advanced Report with the source document or approved setup decision, then check the downstream screen where it is used.

Email Templates

Email Templates

Purpose and when to use this record

Maintain reusable email subject and body content used when Brisk sends business documents or notifications.

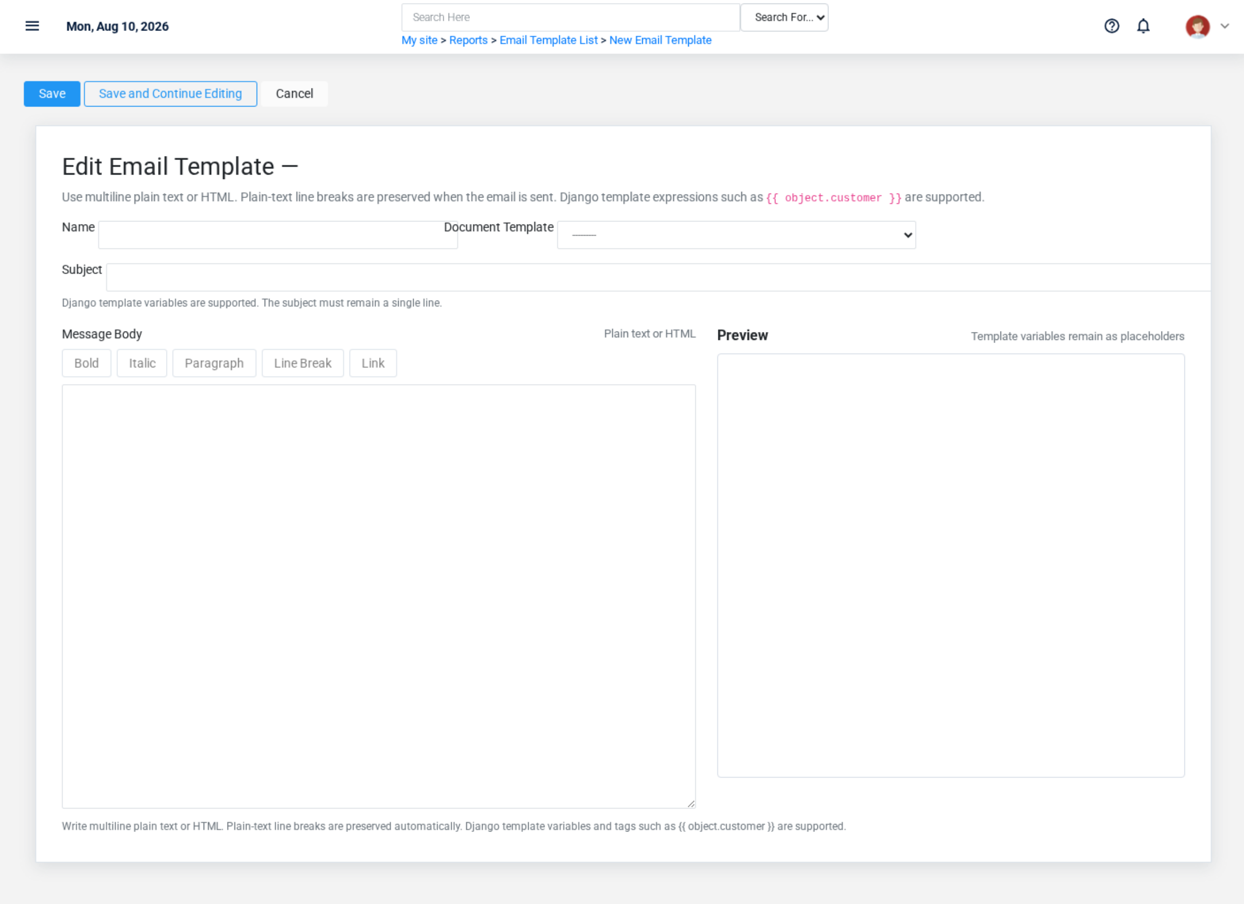
At a glance

- **Identify it by: Name**.
- **Check its business context: Pdf Renderer**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on email templates. 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 an Email Template



The Email Templates create screen in the Brisk documentation demo.

Create an Email Template 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: **Pdf Renderer**.
2. Enter the required identifying and operational values: **Name**, **Subject**, and **Body**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Email Template, then confirm **Name** on its detail page before continuing.

After saving: Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete an Email Template

Delete this Email Template 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.

On the confirmation page, verify **Name**. After confirmation, return to the Email Templates list and make sure only the intended Email Template was removed.

Review Email Template details

Use the detail page as the shared record of what this Email Template currently means. Verify **Name**, **Pdf Renderer**, **Subject**, and **Body** before relying on it for a decision.

Follow **Pdf Renderer** to determine whether the issue is on this Email Template or on one of those linked records.

Next check: Open the screen that uses this choice and confirm the Email Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

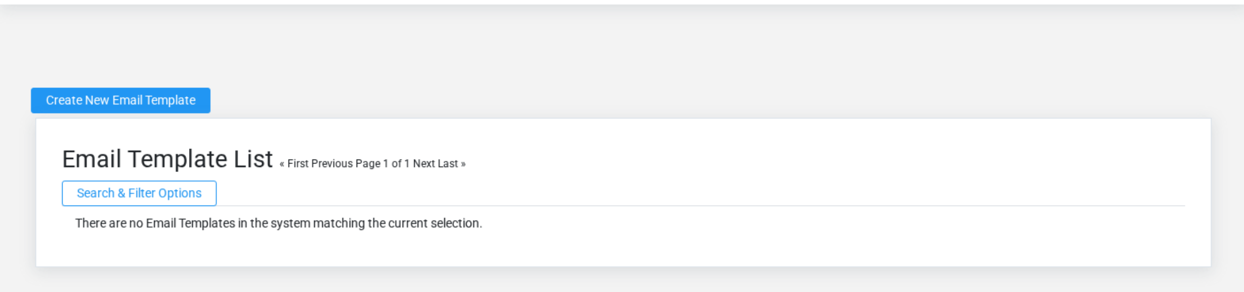
Edit an existing Email Template

Edit this Email Template 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 **Pdf Renderer** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Email Template now appears under the expected **Name**.

After the change: Open the screen that uses this choice and confirm the Email Template 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 email templates



The Email Templates list screen in the Brisk documentation demo.

Use the Email Templates list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Pdf Renderer**.

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

Open the Email Template whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 4 user-relevant fields for this Email Template, 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 mail template.
Pdf Renderer	No	The pdf renderer associated with this mail template.
Subject	Yes	The subject recorded for this mail template.
Body	Yes	The body recorded for this mail template.

What happens next

Open the screen that uses this choice and confirm the Email Template 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**, **Subject**, and **Body** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Pdf Renderer** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Pdf Renderers

Pdf Renderers

Purpose and when to use this record

Configure a printable document template for a particular record or list and control where users can select it.

At a glance

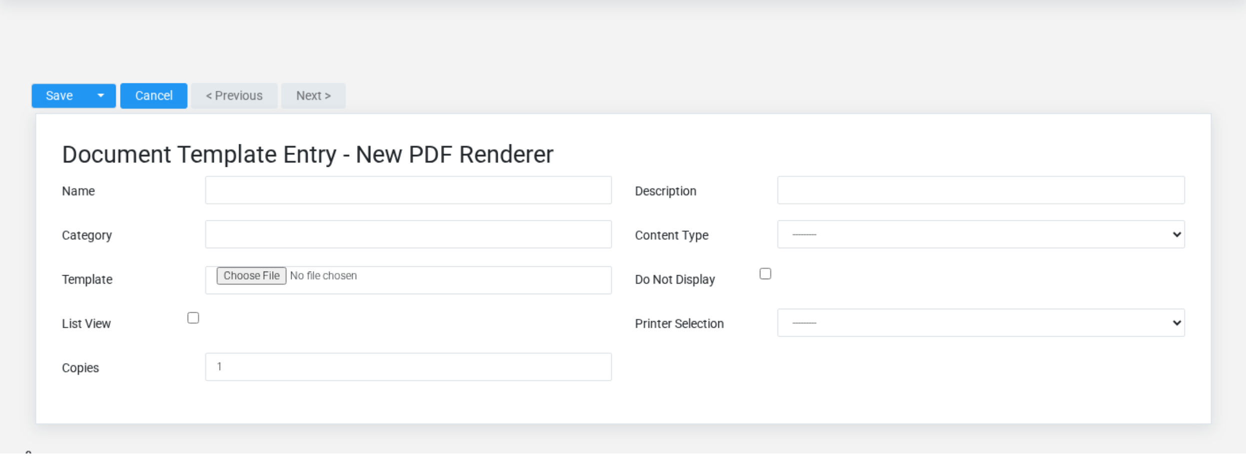
- **Identify it by: Name**.
- **Check its business context: Content Type**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on pdf renderers. 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 **Content Type** records ready first. Those selections determine where this PDF Renderer belongs and which later screens can find it.

Create a PDF Renderer



The Pdf Renderers create screen in the Brisk documentation demo.

Create a PDF Renderer after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Content Type**.
2. Enter the required identifying and operational values: **Name**, **Description**, **Category**, and **Content Type**.
3. Review **Do Not Display**, **List View**, and **Printer Selection** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the PDF Renderer, then confirm **Name** on its detail page before continuing.

After saving: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a PDF Renderer

Delete this PDF Renderer 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.

Before confirming, check for related **Email Templates**, and **Queued Prints**. 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**. After confirmation, return to the PDF Renderers list and make sure only the intended PDF Renderer was removed.

Review PDF Renderer details

Use the detail page as the shared record of what this PDF Renderer currently means. Verify **Printer Selection** before relying on it for a decision.

Follow **Content Type** to determine whether the issue is on this PDF Renderer or on one of those linked records.

Next check: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

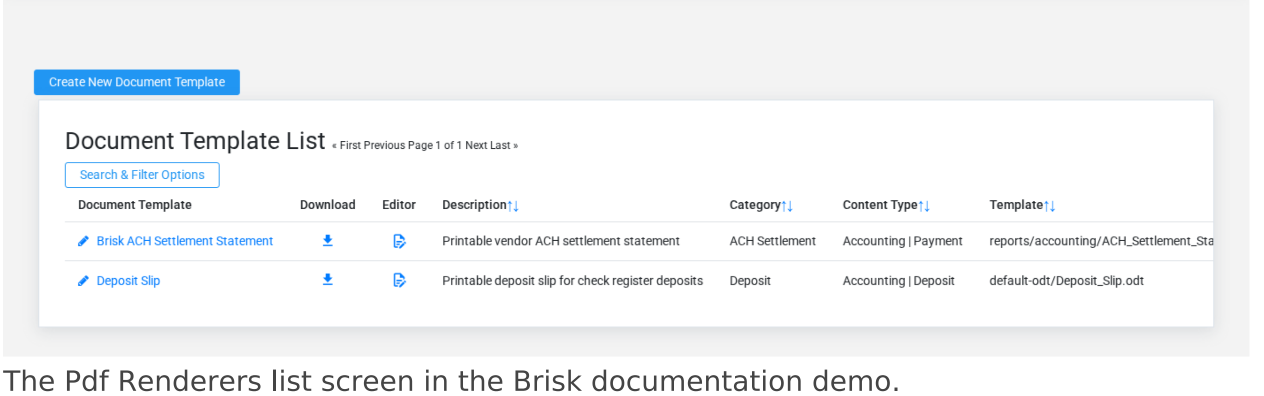
Edit an existing PDF Renderer

Edit this PDF Renderer to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Content Type** with the supporting document or approved request.
2. Recheck **Printer Selection**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the PDF Renderer now appears under the expected **Printer Selection**.

After the change: Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review pdf renderers



The Pdf Renderers list screen in the Brisk documentation demo.

Use the Pdf Renderers list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Content Type**.

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

Open the PDF Renderer whose **Name** match the task. If it is missing, clear the list filters and recheck **Printer Selection** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this PDF Renderer, including 1 linked-record selection 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
Name	Yes	Human-readable name for this pdf renderer.
Description	Yes	Description of this pdf renderer.
Category	Yes	The category recorded for this pdf renderer.
Content Type	Yes	The content type associated with this pdf renderer.
Template	No	File stored as template for this pdf renderer.
Do Not Display	No	Do not display this template as a button on its selected content type.
List View	No	Display this template on lists instead of detail views.
Printer Selection	No	If this field has a value, the system will attempt to automatically print this document to the selected printer after a sales transaction has been saved, if the end user has chosen to print. Available values: Label Printer, Report Printer, Receipt Printer.
Copies	No	If a printer has been selected for this document, this field specifies the number of copies that will be automatically be printed.

What happens next

Verify this PDF Renderer in **Email Templates**, and **Queued Prints** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name**, **Description**, **Category**, and **Content Type** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Content Type** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Receipt Templates

Receipt Templates

Purpose and when to use this record

Maintain receipt layout and business text used for point-of-sale or transaction printing.

At a glance

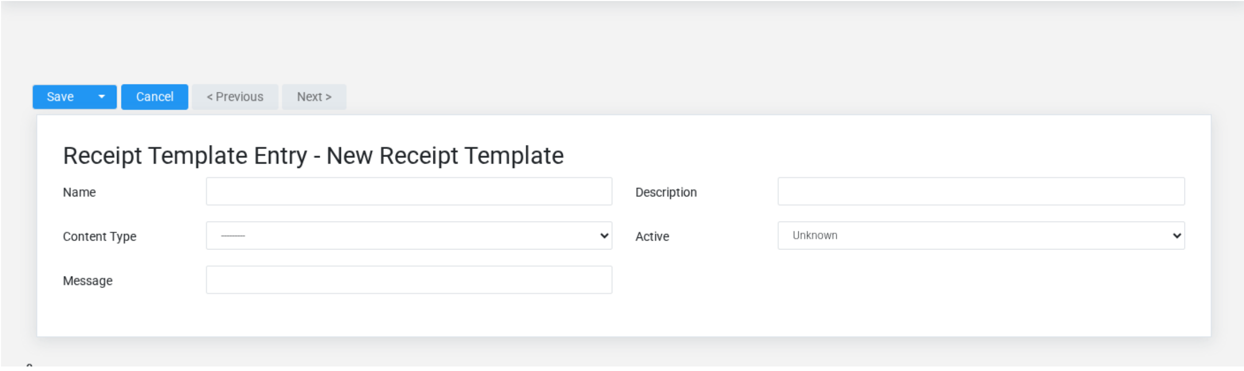
- **Identify it by: Name**.
- **Check its business context: Content Type**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.
- **Why care:** Availability and publication flags affect future use without 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 receipt templates. 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 **Content Type** records ready first. Those selections determine where this Receipt Template belongs and which later screens can find it.

Create a Receipt Template



The Receipt Templates create screen in the Brisk documentation demo.

Create a Receipt Template 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: **Content Type**.
2. Enter the required identifying and operational values: **Name**, **Description**, and **Content Type**.
3. Review **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Receipt Template, then confirm **Name** on its detail page before continuing.

After saving: Open the screen that uses this choice and confirm the Receipt Template 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 Receipt Template

Delete this Receipt Template 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.

On the confirmation page, verify **Name**. After confirmation, return to the Receipt Templates list and make sure only the intended Receipt Template was removed.

Review Receipt Template details

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

Follow **Content Type** to determine whether the issue is on this Receipt Template or on one of those linked records.

Next check: Open the screen that uses this choice and confirm the Receipt Template appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

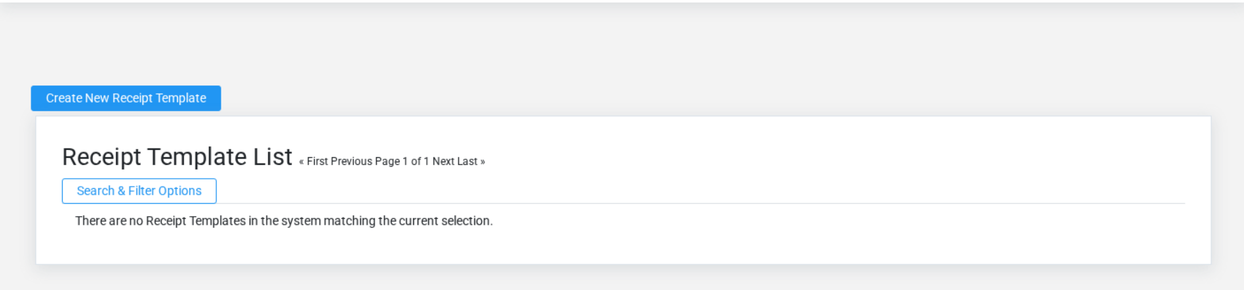
Edit an existing Receipt Template

Edit this Receipt Template 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 **Content Type** with the supporting document or approved request.
2. Recheck **Active**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Receipt Template now appears under the expected **Active**.

After the change: Open the screen that uses this choice and confirm the Receipt Template 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 receipt templates



The Receipt Templates list screen in the Brisk documentation demo.

Use the Receipt Templates list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Content Type**.

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

Open the Receipt Template whose **Name** 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 5 user-relevant fields for this Receipt Template, 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 receipt template.
Description	Yes	Description of this receipt template.
Content Type	Yes	The content type associated with this receipt template.
Active	No	Sets this as the active ESC/POS receipt for a given Content Type.
Message	No	An optional message that will be printed on the bottom of the receipt.

What happens next

Open the screen that uses this choice and confirm the Receipt Template 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**, **Description**, and **Content 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 **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 **Content Type** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Report Charts

Report Charts

Purpose and when to use this record

Turn an advanced report into a chart by selecting label, value, grouping, sorting, series, and display options.

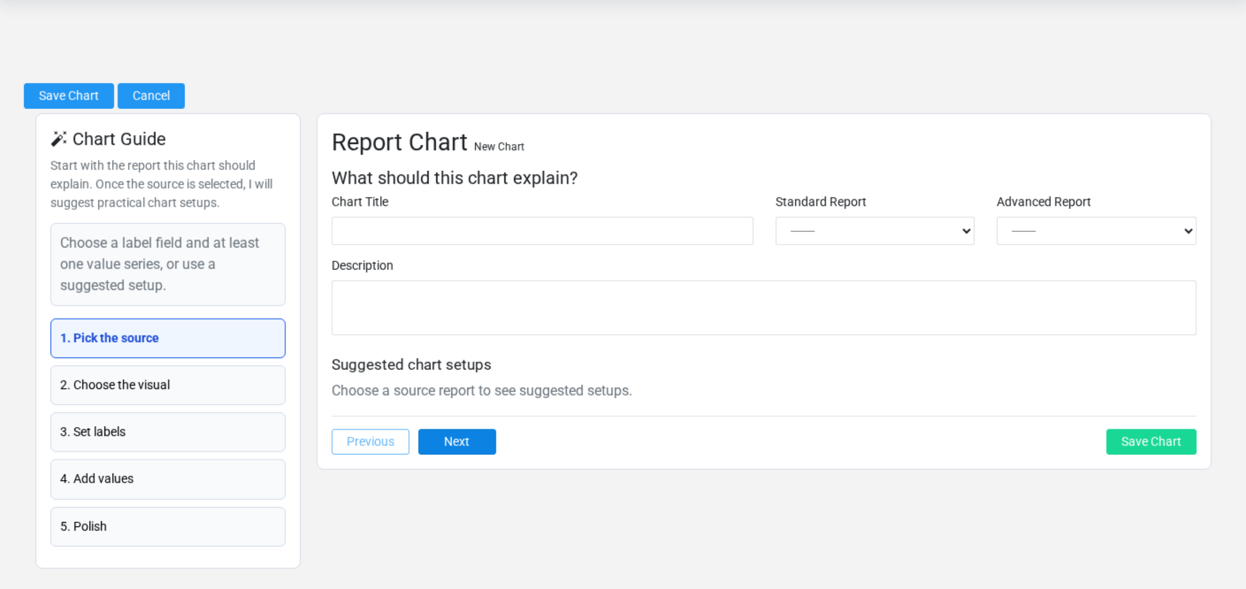
At a glance

- **Identify it by: Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart**.
- **Check its business context: Standard Report**, and **Advanced Report**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on report charts. 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 Report Chart



The Report Charts create screen in the Brisk documentation demo.

Create a Report Chart after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Standard Report**, and **Advanced Report**.
2. Enter the required identifying and operational values: **Chart Title**.
3. Review **System Chart**, **Chart Type**, **Time Grouping**, **Sort**, **Stack Series**, and **Show Legend**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Report Chart, then confirm **Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart** on its detail page before continuing.

After saving: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Report Chart

Delete this Report Chart 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.

Before confirming, check for related **Chart Series**. 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 **Chart Title**, **Label Field**, **Label Subfield**, and **Show Values On Chart**. After confirmation, return to the Report Charts list and make sure only the intended Report Chart was removed.

Review Report Chart details

Use the detail page as the shared record of what this Report Chart currently means. Verify **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette** before relying on it for a decision.

Follow **Standard Report**, and **Advanced Report** to determine whether the issue is on this Report Chart or on one of those linked records.

Next check: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

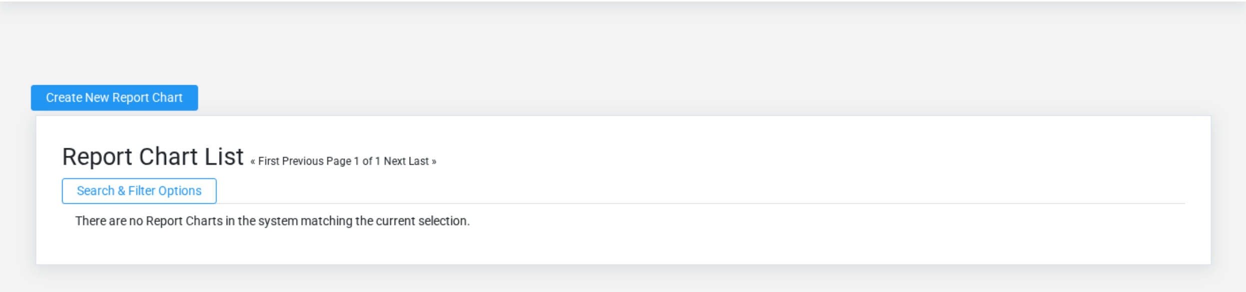
Edit an existing Report Chart

Edit this Report Chart to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Standard Report**, and **Advanced Report** with the supporting document or approved request.
2. Recheck **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette**. These values are most likely to change the population, date range, grouping, and totals users see.
3. Save the change, return to the list, and confirm that the Report Chart now appears under the expected **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette**.

After the change: Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review report charts



The Report Charts list screen in the Brisk documentation demo.

Use the Report Charts list to find the correct record before opening or changing it. Compare **Chart Title**. Records with similar names or numbers can still belong to different **Standard Report**, and **Advanced Report**.

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

Open the Report Chart whose **Chart Title** match the task. If it is missing, clear the list filters and recheck **Chart Type**, **Time Grouping**, **Sort**, and **Color Palette** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 18 user-relevant fields for this Report Chart, including 2 linked-record selections and 4 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Chart Title	Yes	Human-readable name for this report chart.
Description	No	Description of this report chart.
Standard Report	No	The standard report associated with this report chart.
Advanced Report	No	The advanced report associated with this report chart.
Display Order	No	The display order value recorded for this report chart.
System Chart	No	Charts provided by Brisk can be copied but not modified by standard users.
Chart Type	No	The chart type recorded for this report chart. Available values: Bar, Horizontal Bar, Line, Area, Pie, Doughnut, Polar Area, Radar.
Label Field	No	Field used for labels. For dates, combine this with Time Grouping.
Label Subfield	No	The label subfield recorded for this report chart.
Time Grouping	No	Group date or datetime label fields into reporting periods. Available values: No Time Grouping, Day, Week, Month, Quarter, Year.
Sort	No	The sort recorded for this report chart. Available values: Source Order, Label A-Z, Label Z-A, Smallest Value, Largest Value.

Field	Required	What it controls
Maximum Labels	No	Limits long charts and groups the remainder into Other where possible.
Stack Series	No	Whether the stack series option applies to this report chart.
Show Legend	No	Whether the show legend option applies to this report chart.
Start Axis At Zero	No	Whether the start axis at zero option applies to this report chart.
Show Values On Chart	No	Whether the show values on chart option applies to this report chart.
Chart Height	No	The chart height value recorded for this report chart.
Color Palette	No	The color palette recorded for this report chart. Available values: Business, Finance, Inventory, High Contrast.

What happens next

Verify this Report Chart in **Chart Series** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Chart Title** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Standard Report**, and **Advanced Report** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Reports

Reports

Purpose and when to use this record

Define a reusable business report, its data source, date behavior, category, filters, and system/custom status.

At a glance

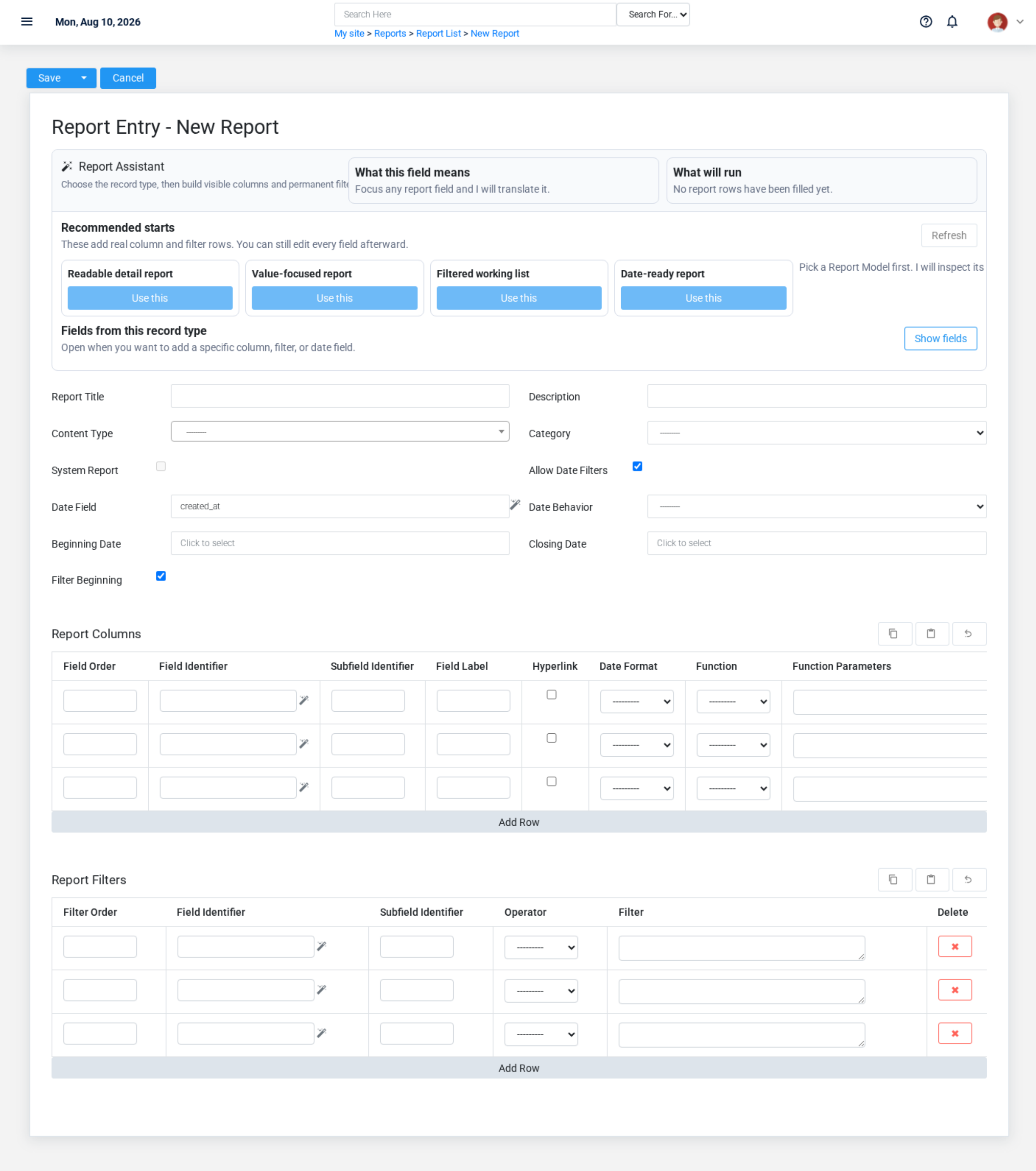
- **Identify it by: Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date**.
- **Check its business context: Content Type**.
- **Why care:** A report is only trustworthy when its data source, date field, filters, grouping, and totals answer the intended business question.

Before you begin

You need the Brisk permission for the action you are taking on reports. 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 **Content Type** records ready first. Those selections determine where this Report belongs and which later screens can find it.

Create a Report



The Reports create screen in the Brisk documentation demo.

Create a Report 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: **Content Type**.
2. Enter the required identifying and operational values: **Report Title**, and **Content Type**.
3. Review **Category**, **System Report**, **Allow Date Filters**, **Date Behavior**, and **Filter Beginning** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Report, then confirm **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date** on its detail page before continuing.

After saving: Open **Advanced Report Rows**, **Report Charts**, **Report Columns**, and **Report Filters** and confirm the Report 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 Report

Delete this Report 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.

Before confirming, check for related **Report Charts**, **Report Columns**, **Report Filters**, and **Advanced Report Rows**. 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 **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, and **Beginning Date**. After confirmation, return to the Reports list and make sure only the intended Report was removed.

Review Report details

Use the detail page as the shared record of what this Report currently means. Verify **Category**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date** before relying on it for a decision.

Follow **Content Type** to determine whether the issue is on this Report or on one of those linked records.

Next check: Open **Advanced Report Rows**, **Report Charts**, **Report Columns**, and **Report Filters** and confirm the Report 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 Report

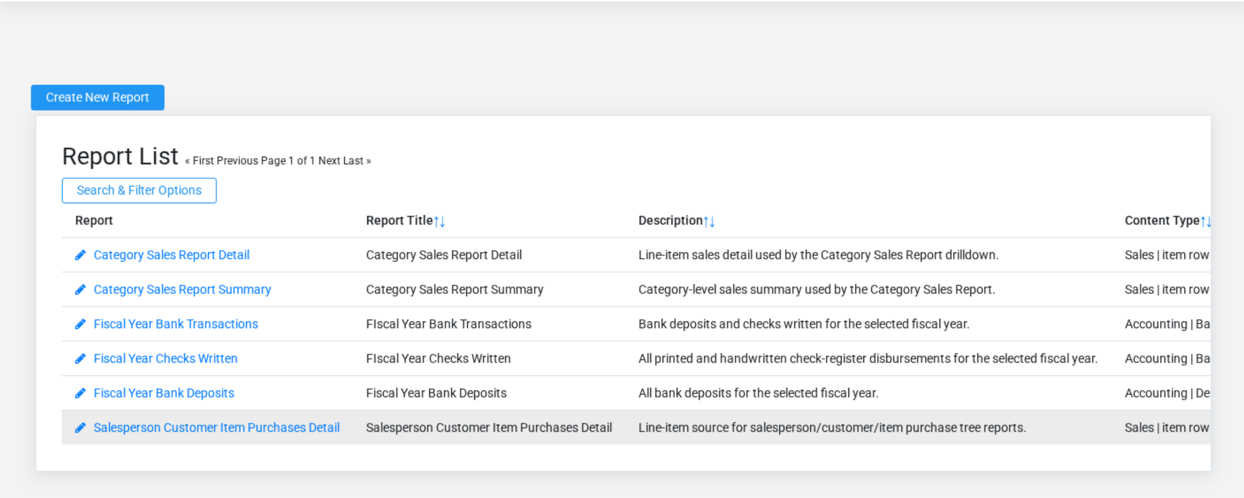
Edit this Report when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Content Type** with the supporting document or approved request.
2. Recheck **Category**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date**. These values are most likely to change the population, date range, grouping, and totals users see.

3. Save the change, return to the list, and confirm that the Report now appears under the expected **Category**, and **Date Behavior**.

After the change: Open **Advanced Report Rows**, **Report Charts**, **Report Columns**, and **Report Filters** and confirm the Report 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 reports



The Reports list screen in the Brisk documentation demo.

Use the Reports list to find the correct record before opening or changing it. Compare **Report Title** , **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date**. Records with similar names or numbers can still belong to different **Content Type**.

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

Open the Report whose **Report Title**, **Allow Date Filters**, **Date Field**, **Date Behavior**, **Beginning Date**, and **Closing Date** match the task. If it is missing, clear the list filters and recheck **Category**, and **Date Behavior** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this Report, 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
Report Title	Yes	The name or title of this report.

Field	Required	What it controls
Description	No	Description of this report definition.
Content Type	Yes	The content type associated with this report definition.
Category	No	The category recorded for this report definition. Available values: Accounting, Inventory, Management, Manufacturing, Sales, Financial, Favorites.
System Report	No	Reports provided by Brisk are considered system reports; they can be copied but not deleted or modified.
Allow Date Filters	No	If this field is disabled, live date filters will not be available for this report.
Date Field	No	By default, the system will attempt to filter by date using the created_at field. If this field is populated, the system will attempt to filter by the provided field instead. This field is ignored if Allow Date Filters is not enabled.
Date Behavior	No	Select the initial state of the date filters on this report. Available values: All Time, Today, Yesterday, Last 7 Days, Week-to-date, Last 30 Days, Month-to-date, Last 365 Days, Year-to-date, Previous Week, Previous Week-to-day, Previous Month, Previous Month-to-date, Previous Year, Previous Year-to-date, Custom Date Range.
Beginning Date	No	Sets the start date for this report if using a custom date range.
Closing Date	No	Sets the end date for this report if using a custom date range.
Filter Beginning	No	If set to false, when filtering this report by date, it will only filter by the ending date, not the beginning date.

What happens next

Open **Advanced Report Rows**, **Report Charts**, **Report Columns**, and **Report Filters** and confirm the Report 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 **Report Title**, and **Content Type** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Content Type** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

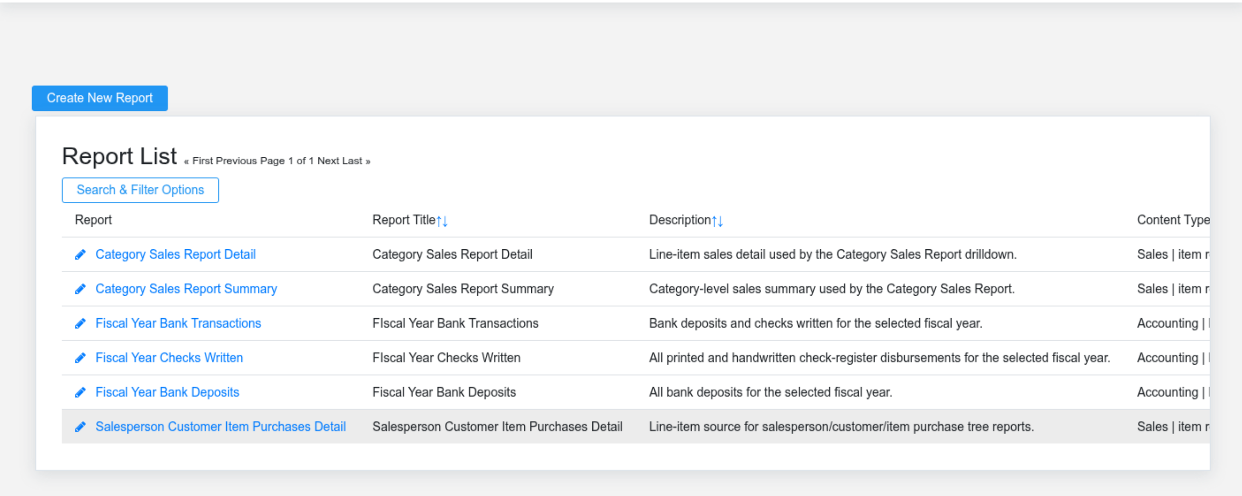
Start Here

Start Here

Reports

Reports

Reports overview



The Reports workspace related to this reference article.

Reports turns Brisk data into operational lists, financial analysis, charts, printed documents, receipts, and outbound email content. A report is only as reliable as its source transactions, date scope, warehouse scope, filters, and posting state, so use this module to define and run output—not to repair the underlying business data.

Choose the right reporting tool

- Use a Report Definition for a reusable report with a known data source, category, date behavior, and filter set.
- Use an Advanced Report when users need selected columns, grouping, sorting, filters, totals, and controlled access.
- Add a Report Chart when a visual comparison materially helps; keep the underlying report available for exact values.
- Use PDF Renderers for printable record or list layouts, Receipt Templates for transaction receipts, and Email Templates for reusable message content.

- Use Work Period Reports for date-bounded operating and accounting output tied to completed work periods.

Validate before distributing

Read the report title, as-of date or range, warehouse, customer/vendor scope, status filters, and inclusion choices from the output itself. Compare totals to the relevant register or source list, especially after period close, backdated posting, imports, or corrections. A visually plausible report can still omit open, voided, unposted, out-of-range, or out-of-scope transactions.

Template and access controls

Preview template changes with representative long names, multi-page detail, zero and negative values, and the intended paper size. Treat report permissions and recipient selection as data access controls. Avoid placing credentials or sensitive personal data in templates, and keep system reports distinguishable from locally maintained reports so updates do not overwrite business-specific output.