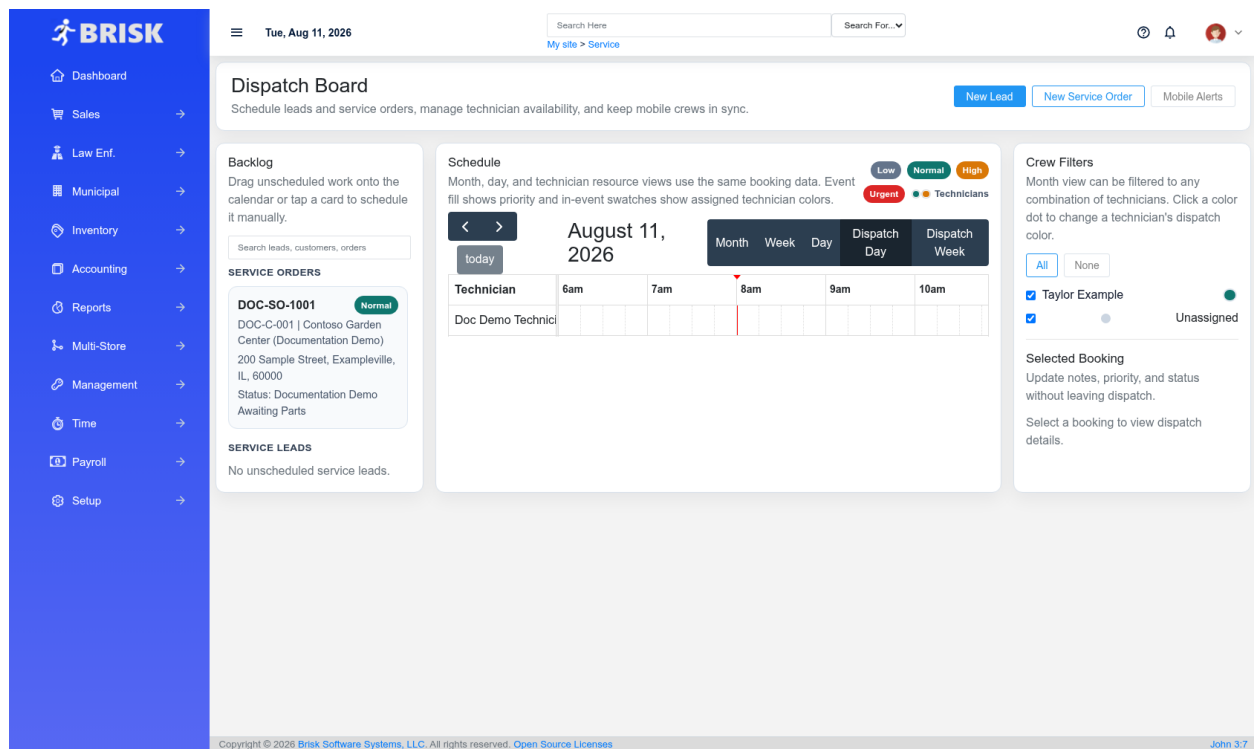


# Bookings

# Bookings

## Purpose and when to use this record



The Bookings overview screen in the Brisk documentation demo.

Reserve service time for a customer, piece of equipment, technician, and planned work window before or alongside the service order.

## At a glance

- **Identify it by:** **Booking Date**, and **Status**.
- **Check its business context:** **Customer**, **Service Order**, and **Service Lead**.
- **Why care:** Customer, equipment, scope, priority, technician availability, parts, labor, and status must stay aligned from intake through billing.
- **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 bookings. 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.

## Fields and business rules

Brisk stores 16 user-relevant fields for this Booking, including 3 linked-record selections 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                                                                                                           |
|-----------------------|----------|----------------------------------------------------------------------------------------------------------------------------|
| <b>Booking Date</b>   | Yes      | Records the date and time of this booking.                                                                                 |
| <b>Booking End</b>    | No       | End time of this scheduled job.                                                                                            |
| <b>Title</b>          | No       | Short title shown on the dispatch board.                                                                                   |
| <b>Customer</b>       | No       | The customer for this booking.                                                                                             |
| <b>Service Order</b>  | No       | Connects this booking to a service order.                                                                                  |
| <b>Service Lead</b>   | No       | Connects this booking to a lead before it becomes a service order.                                                         |
| <b>Status</b>         | No       | Current status of this booking.<br>Available values: Unscheduled, Scheduled, Dispatched, In Progress, Completed, Canceled. |
| <b>Priority</b>       | No       | The priority recorded for this booking.<br>Available values: Low, Normal, High, Urgent.                                    |
| <b>Dispatch Notes</b> | No       | The dispatch notes recorded for this booking.                                                                              |
| <b>Unscheduled</b>    | No       | Marks jobs that should stay in the backlog until explicitly placed on the calendar.                                        |
| <b>Routesequence</b>  | No       | Optional route ordering for the day.                                                                                       |
| <b>Address Line 1</b> | No       | Enter the address of this booking.                                                                                         |
| <b>Address Line 2</b> | No       | The address line 2 recorded for this booking.                                                                              |

| Field    | Required | What it controls                        |
|----------|----------|-----------------------------------------|
| City     | No       | The city recorded for this booking.     |
| State    | No       | The state recorded for this booking.    |
| Zip Code | No       | The zip code recorded for this booking. |

# What happens next

Use **Customer**, **Service Order**, and **Service Lead** to interpret this Booking. If it records a failure or exception, correct the source process and create a new successful event rather than rewriting the audit trail.

# Common mistakes and troubleshooting

- **The record will not save:** Recheck **Booking 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**, and **Priority**, 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 **Customer**, **Service Order**, and **Service Lead** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.