Equipment Categories

Equipment Categories

Purpose and when to use this record

Maintain broad equipment groupings used for intake, filtering, and service reporting.

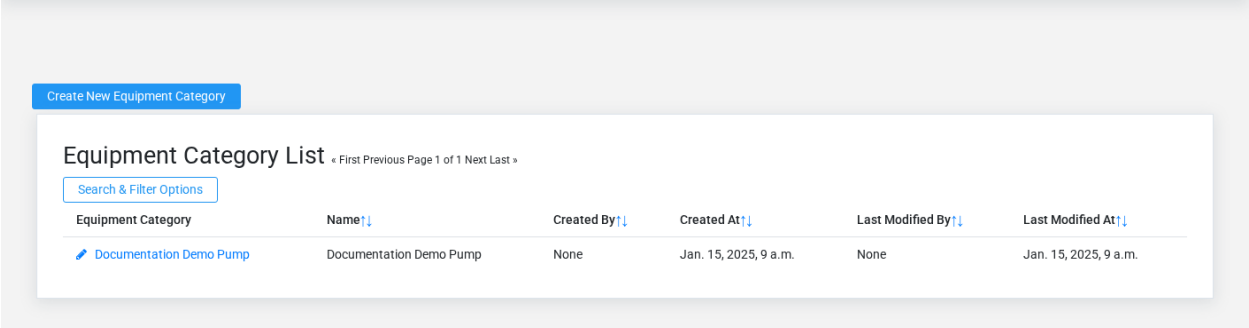
At a glance

- **Identify it by: Name**.
- **Why care:** Customer, equipment, scope, priority, technician availability, parts, labor, and status must stay aligned from intake through billing.

Before you begin

You need the Brisk permission for the action you are taking on equipment categories. 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.

Find and review equipment categories

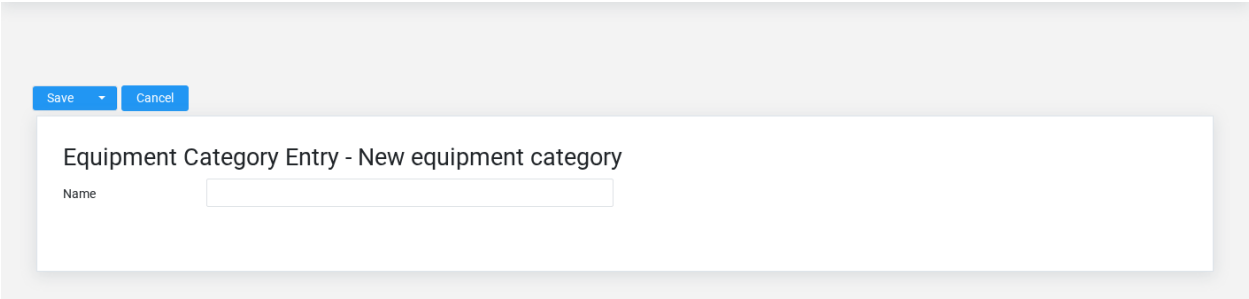


The Equipment Categories list screen in the Brisk documentation demo.

Use the Equipment Categories list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

Open the equipment category 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.

Create an equipment category



The Equipment Categories create screen in the Brisk documentation demo.

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

After saving: Open **Equipment** and confirm the equipment category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

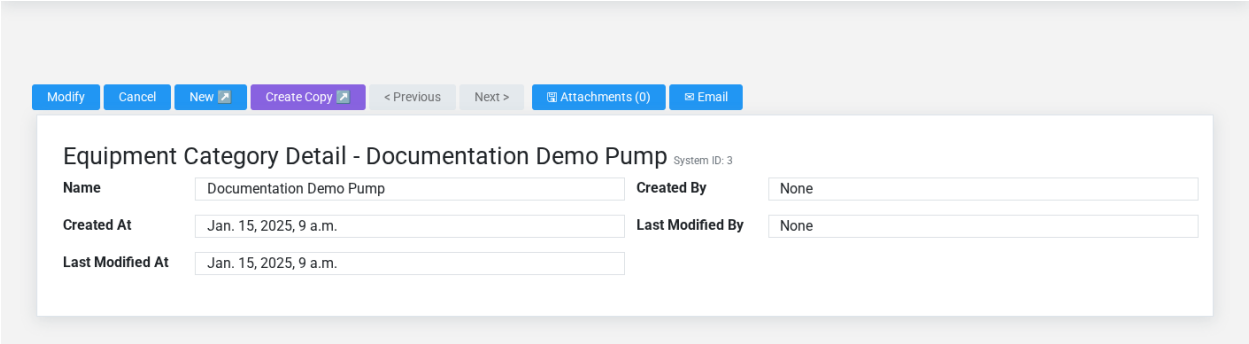
Delete an equipment category

Delete this equipment category 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 **Equipment**. 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 Equipment Categories list and make sure only the intended equipment category was removed.

Review equipment category details



The Equipment Categories detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this equipment category currently means. Verify **Name** before relying on it for a decision.

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

Next check: Open **Equipment** and confirm the equipment category 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 equipment category

Edit this equipment category 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 **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change intake, estimating, dispatch, parts, labor, completion, and billing.
3. Save the change, return to the list, and confirm that the equipment category now appears under the expected **Name**.

After the change: Open **Equipment** and confirm the equipment category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Fields and business rules

Brisk stores 1 user-relevant fields for this equipment category, including 0 linked-record selections 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 equipment category.

What happens next

Open **Equipment** and confirm the equipment category 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** 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 equipment category with the source document or approved setup decision, then check the downstream screen where it is used.

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