Equipment Statuses

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Purpose and when to use this record

Maintain the condition or availability states assigned to customer equipment.

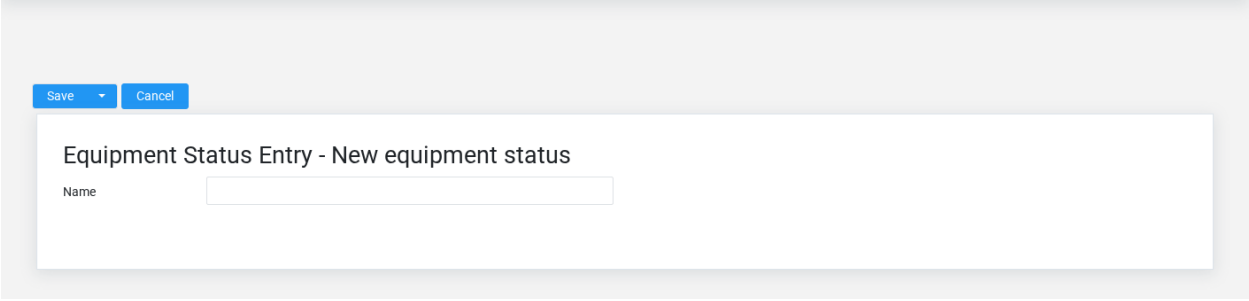
At a glance

- **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 statuses. 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 equipment status



The Equipment Statuses create screen in the Brisk documentation demo.

Create an equipment status 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 status, then confirm **Name** on its detail page before continuing.

After saving: Open **Equipment** and confirm the equipment status 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 status

Delete this equipment status 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 Statuses list and make sure only the intended equipment status was removed.

Review equipment status details

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

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

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

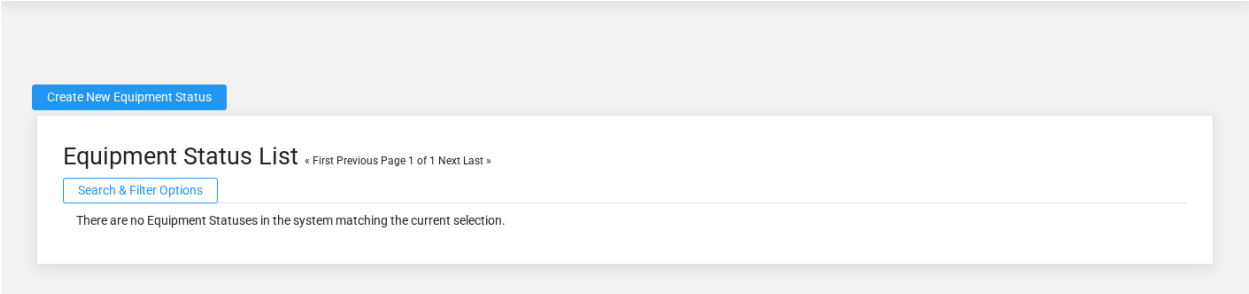
Edit an existing equipment status

Edit this equipment status 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 status now appears under the expected **Name**.

After the change: Open **Equipment** and confirm the equipment status 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 equipment statuses



The Equipment Statuses list screen in the Brisk documentation demo.

Use the Equipment Statuses 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 status 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 1 user-relevant fields for this equipment status, 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 status.

What happens next

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

Revision #3
Created 2026-08-10 16:09:47 UTC by Brisk
Updated 2026-08-10 20:30:23 UTC by Brisk