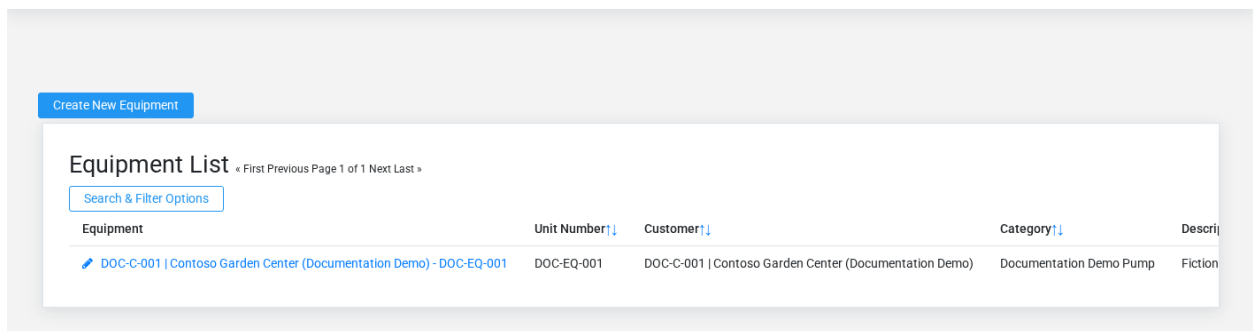


Equipment

Equipment

Purpose and when to use this record



The Equipment overview screen in the Brisk documentation demo.

Maintain the customer-owned unit being serviced, including identity, make/model, serial number, meter, condition, and notes.

At a glance

- **Identify it by:** **Unit Number**, and **Status**.
- **Check its business context:** **Customer**, **Category**, **Status**, and **Make**.
- **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 equipment. 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 **Customer** records ready first. Those selections determine where this Equipment belongs and which later screens can find it.

Create an Equipment

The Equipment create screen in the Brisk documentation demo.

Create an Equipment 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: **Customer**, **Category**, **Status**, and **Make**.
2. Enter the required identifying and operational values: **Customer**.
3. Review **Unit Number**, **Description**, **Model**, **Serial**, **Mileage/Hours**, and **Notes** against the source document or approved setup decision.
4. Save the Equipment, then confirm **Unit Number**, and **Status** on its detail page before continuing.

After saving: Verify this Equipment in **Service Leads**, **Service Orders**, and **Service Quotes** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete an Equipment

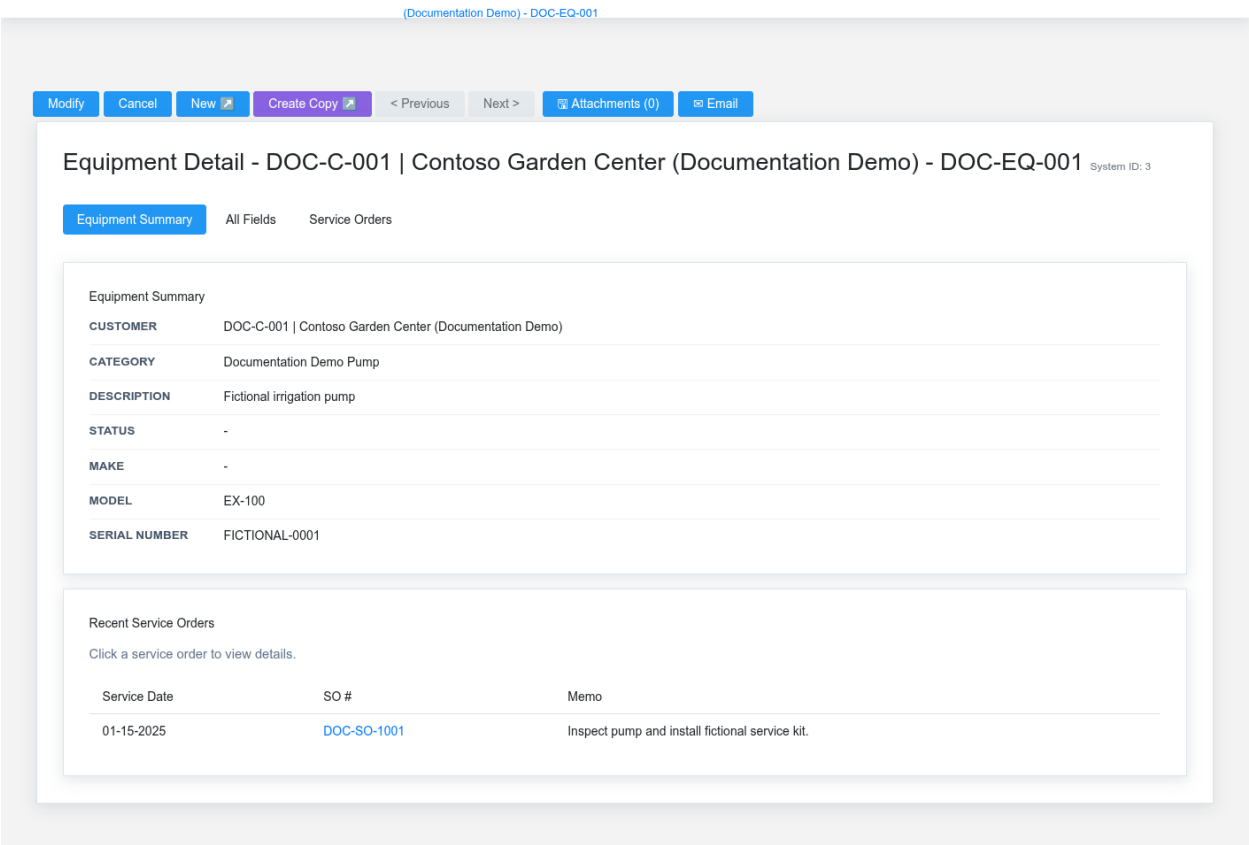
Delete this Equipment only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Service Leads**, **Service Orders**, and **Service Quotes**. 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 **Unit Number**, and **Status**. After confirmation, return to the Equipment list and make sure only the intended Equipment was removed.

Review Equipment details



The Equipment detail screen in the Brisk documentation demo.

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

Follow **Customer**, **Category**, **Status**, and **Make** to determine whether the issue is on this Equipment or on one of those linked records.

Next check: Verify this Equipment in **Service Leads**, **Service Orders**, and **Service Quotes** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Edit an existing Equipment

Edit this Equipment 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 **Customer**, **Category**, **Status**, and **Make** with the supporting document or approved request.
2. Recheck **Customer**, and **Status**. 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 now appears under the expected **Status**.

After the change: Verify this Equipment in **Service Leads**, **Service Orders**, and **Service Quotes** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Fields and business rules

Brisk stores 10 user-relevant fields for this Equipment, including 4 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
Unit Number	No	Enter the number or name used internally by your business to identify this equipment.
Customer	Yes	The customer associated with this equipment.
Category	No	Sets the class or category of this equipment.
Description	No	A short description or name of the equipment.
Status	No	Use this field to track the status of a piece of equipment.
Make	No	Use this field to record the make of the equipment.
Model	No	Use this field to record the model or model number of this equipment.
Serial	No	Enter the equipment serial number for ease of finding it in the future.
Mileage/Hours	No	Record the equipment mileage, hours, or other time tracking metric.
Notes	No	Use this field to store internal notes about this equipment.

What happens next

Verify this Equipment in **Service Leads**, **Service Orders**, and **Service Quotes** 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 **Customer** 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:** Open **Customer**, **Category**, **Status**, and **Make** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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