

Service Categories

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Purpose and when to use this record

Maintain the types of service work used for intake, quoting, assignment, and reporting.

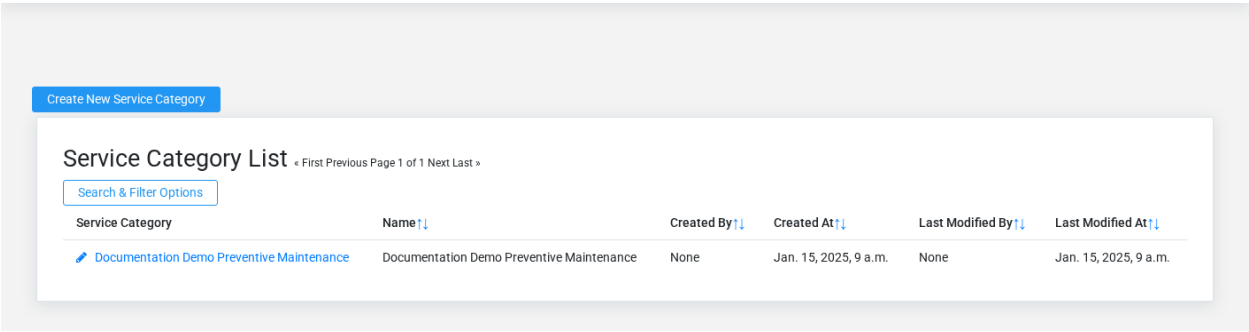
At a glance

- **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 service 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 service categories

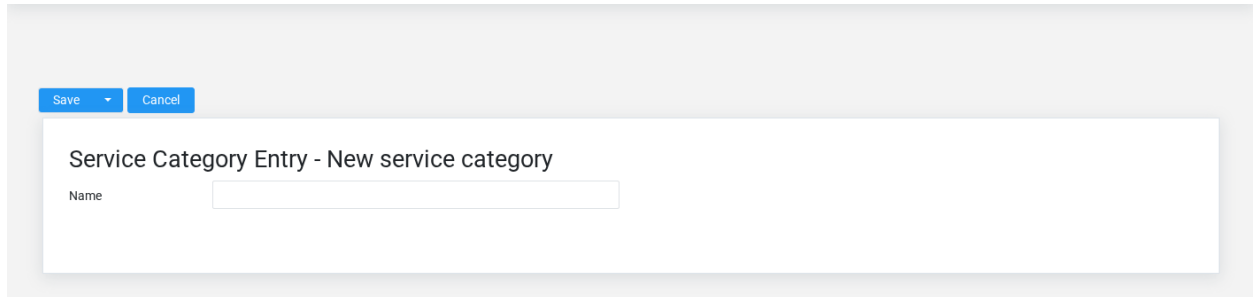


The Service Categories list screen in the Brisk documentation demo.

Use the Service 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 service 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 a service category

The image shows a screenshot of a web application interface for creating a new service category. At the top, there is a light blue header bar containing two buttons: 'Save' and 'Cancel'. Below this header, the main content area has a title 'Service Category Entry - New service category'. Underneath the title, there is a text input field with the label 'Name' to its left.

The Service Categories create screen in the Brisk documentation demo.

Create a service 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 service category, then confirm **Name** on its detail page before continuing.

After saving: Open **Service Orders**, and **Service Quotes** and confirm the service 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 a service category

Delete this service 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 **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 **Name**. After confirmation, return to the Service Categories list and make sure only the intended service category was removed.

Review service category details

Service Category Detail - Documentation Demo Preventive Maintenance System ID: 3

Name	Documentation Demo Preventive Maintenance	Created By	None
Created At	Jan. 15, 2025, 9 a.m.	Last Modified By	None
Last Modified At	Jan. 15, 2025, 9 a.m.		

The Service Categories detail screen in the Brisk documentation demo.

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

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

Next check: Open **Service Orders**, and **Service Quotes** and confirm the service 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 service category

Edit this service 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 service category now appears under the expected **Name**.

After the change: Open **Service Orders**, and **Service Quotes** and confirm the service 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 service 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 service category.

What happens next

Open **Service Orders**, and **Service Quotes** and confirm the service 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 service category with the source document or approved setup decision, then check the downstream screen where it is used.