

Service Snippets

Service Snippets

Purpose and when to use this record

Maintain reusable service-note language so technicians and office staff record common work consistently.

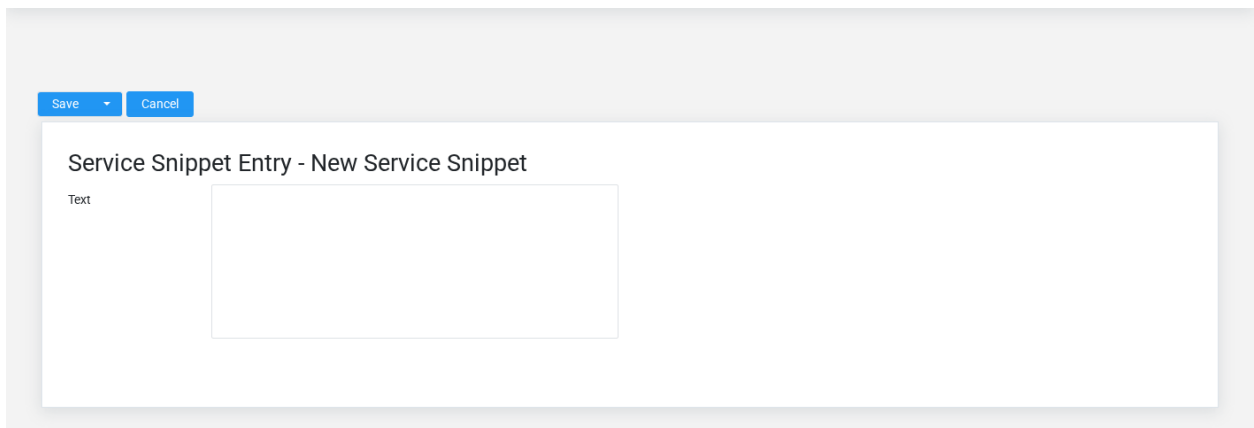
At a glance

- **Identify it by: Text.**
- **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 snippets. 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 a Service Snippet

A screenshot of a web form titled "Service Snippet Entry - New Service Snippet". At the top left of the form are two buttons: "Save" with a dropdown arrow and "Cancel". Below the title, there is a label "Text" followed by a large, empty rectangular text input field.

The Service Snippets create screen in the Brisk documentation demo.

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

After saving: Verify this Service Snippet in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Service Snippet

Delete this Service Snippet 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.

On the confirmation page, verify **Text**. After confirmation, return to the Service Snippets list and make sure only the intended Service Snippet was removed.

Review Service Snippet details

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

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

Next check: Verify this Service Snippet in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Edit an existing Service Snippet

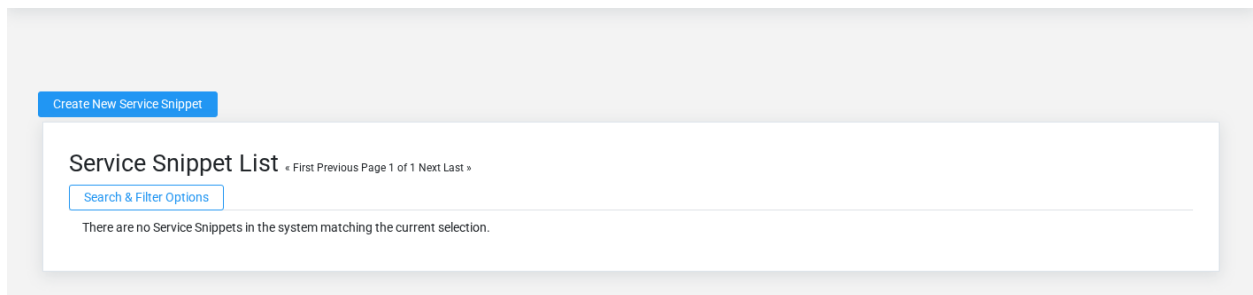
Edit this Service Snippet to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare the identifying information shown on the screen 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 Snippet now appears under the expected the identifying information shown on the screen.

After the change: Verify this Service Snippet in the next transaction or assignment screen before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review service snippets



The Service Snippets list screen in the Brisk documentation demo.

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

Open the Service Snippet whose **Text** 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 Service Snippet, 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
Text	Yes	Enter the text to reuse here.

What happens next

Verify this Service Snippet in the next transaction or assignment screen 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 **Text** 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 Snippet with the source document or approved setup decision, then check the downstream screen where it is used.

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