

Technicians

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Purpose and when to use this record

Maintain the dispatch identity, linked employee, active state, display color, and mobile label for a service technician.

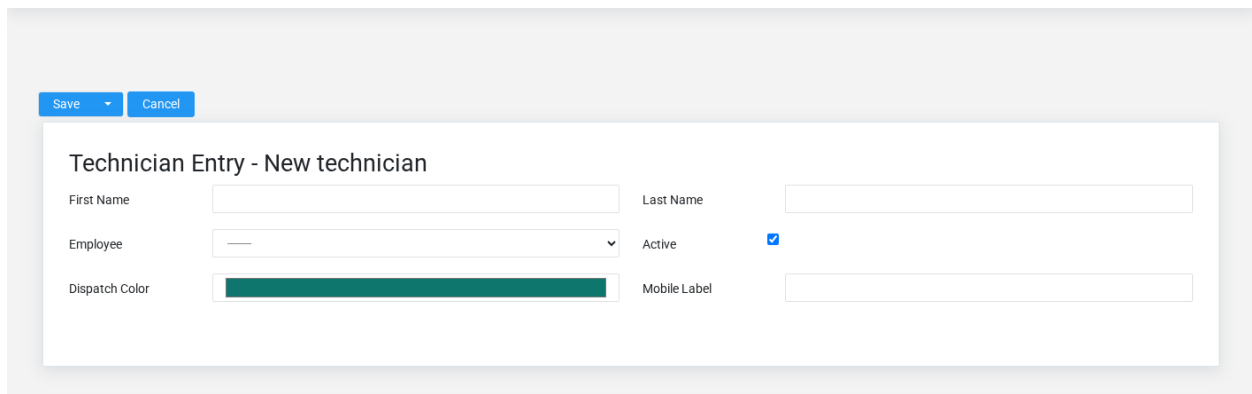
At a glance

- **Identify it by:** **First Name**, **Last Name**, and **Mobile Label**.
- **Check its business context:** **Employee**.
- **Why care:** Customer, equipment, scope, priority, technician availability, parts, labor, and status must stay aligned from intake through billing.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on technicians. 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 technician



The Technicians create screen in the Brisk documentation demo.

Create a technician 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: **Employee**.
2. Enter the required identifying and operational values: **First Name**, and **Last Name**.
3. Review **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the technician, then confirm **First Name**, **Last Name**, and **Mobile Label** on its detail page before continuing.

After saving: Verify this technician in **Bookings**, **Service Labor**, **Service Leave**, and **Service Parts**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a technician

Delete this technician 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.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Bookings**, **Service Labor**, **Service Leave**, **Service Parts**, and **Service Working Hours**. 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 **First Name**, **Last Name**, and **Mobile Label**. After confirmation, return to the Technicians list and make sure only the intended technician was removed.

Review technician details

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

Follow **Employee** to determine whether the issue is on this technician or on one of those linked records.

Next check: Verify this technician in **Bookings**, **Service Labor**, **Service Leave**, and **Service Parts**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

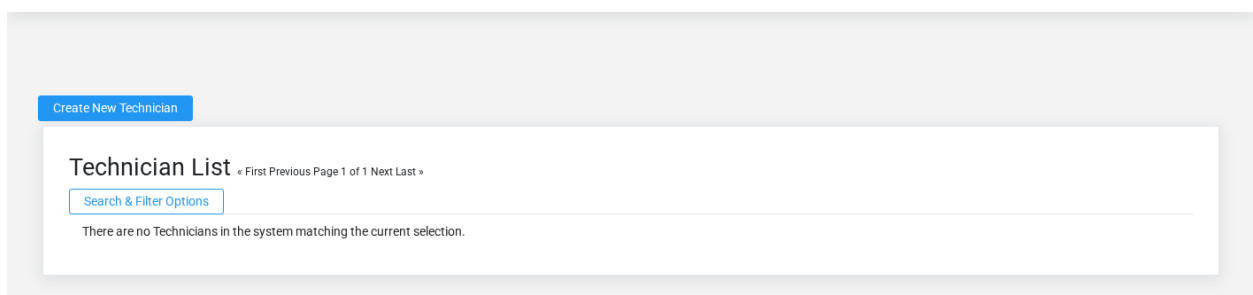
Edit an existing technician

Edit this technician 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 **Employee** with the supporting document or approved request.
2. Recheck **Active**. 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 technician now appears under the expected **Active**.

After the change: Verify this technician in **Bookings**, **Service Labor**, **Service Leave**, and **Service Parts**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review technicians



The Technicians list screen in the Brisk documentation demo.

Use the Technicians list to find the correct record before opening or changing it. Compare **First Name**, and **Last Name**. Records with similar names or numbers can still belong to different **Employee**.

Open the technician whose **First Name**, and **Last Name** match the task. If it is missing, clear the list filters and recheck **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 6 user-relevant fields for this technician, including 1 linked-record selection 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
First Name	Yes	The first name recorded for this technician.
Last Name	Yes	The last name recorded for this technician.
Employee	No	Optional employee record used for linked user accounts, time tracking, and notifications.
Active	No	Inactive technicians are hidden from dispatch by default.
Dispatch Color	No	The dispatch color recorded for this technician.
Mobile Label	No	Optional short label for mobile dispatch cards.

What happens next

Verify this technician in **Bookings**, **Service Labor**, **Service Leave**, and **Service Parts**, plus the remaining screen fields 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 **First Name**, and **Last Name** 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 **Active**, 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 **Employee** 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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