

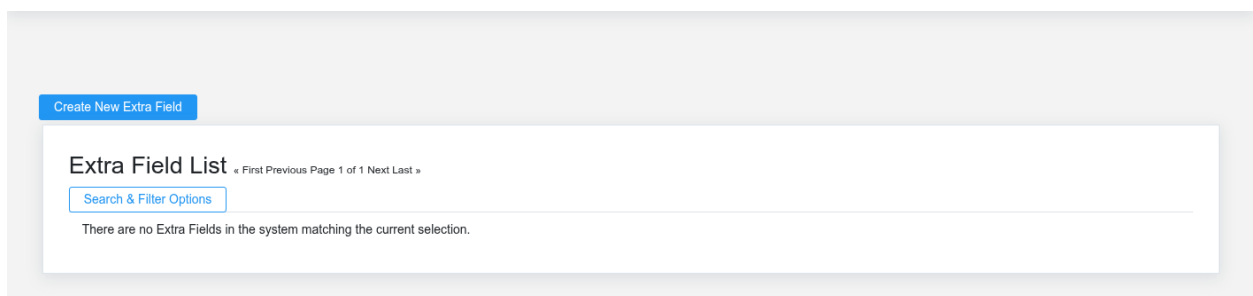
Custom Fields

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Purpose and when to use this screen

Custom Fields adds organization-specific information to supported Brisk record types when no standard field represents the requirement. Use it for durable business facts that need consistent entry and lookup—not for temporary notes, calculations that belong in code, or a duplicate of an existing field.

Configure custom fields



The Custom Fields fields screen in the Brisk documentation demo.

1. Search the target form and existing custom-field list before creating anything.
2. Select **Create New Custom Field** and choose the target application/model carefully. This determines which records and forms receive the field.
3. Enter a clear business-facing name/label and select the data type that matches expected use. Define choices or defaults where supported.
4. Decide whether the field is required. A required field can block creation or editing of existing records that do not yet have a value.
5. Save, then open create, detail, and edit screens for the target record and verify display, validation, permissions, and list/report behavior.

Design fields for real work

Use one concept per field and stable vocabulary. Prefer a controlled choice when the business will filter or report by the value; prefer text only when variation is genuinely needed. Include units in the label for measurements. Avoid placing passwords, payment credentials, health data, or other sensitive information in a general-purpose custom field unless access, retention, and disclosure have been explicitly designed.

Working safely and effectively

Changing the target model, type, choices, or required behavior after data exists can make earlier values misleading or unusable. Inventory affected forms, imports, API integrations, reports, and templates before changing a definition. Test significant changes on copied data, plan how existing rows will be populated or converted, and communicate the effective date.

Retire a custom field

Export or otherwise preserve required values before deletion. If the business may need historical data, stop using the field and remove it from workflows through a controlled migration instead of immediately deleting its definition. Verify that no report, template, import, or integration still expects it.

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