

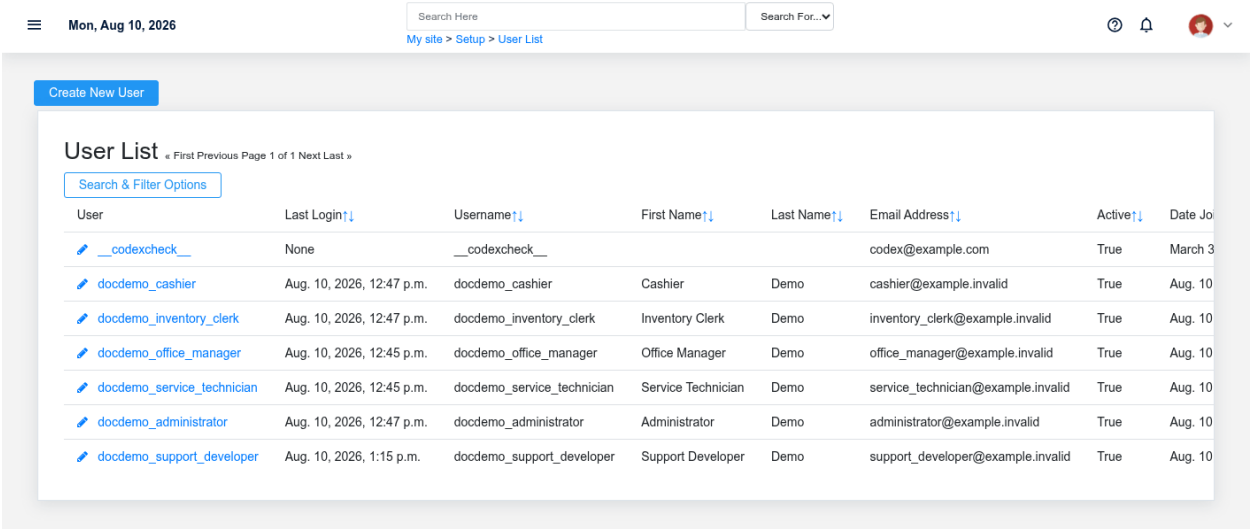
Start Here

- [Setup](#)

Setup

Setup

Setup overview



The Setup workspace related to this reference article.

Setup controls how Brisk behaves across the organization, for an individual user, and on a specific workstation. It also contains user and supervisor access, notification setup, data migration, configuration transfer, backup, and restricted support tools. Confirm which scope owns a change before making it.

Choose the correct scope

- Use System Settings for organization-wide modules, accounting behavior, inventory and sales policy, integrations, printing, email, and other shared defaults. Its documentation is restricted to authorized BookStack users because the reference includes Brisk-support-only sections.
- Use [User Preferences](#) for the signed-in person’s layout, workflow defaults, profile, and personal behavior.
- Use [Local Workstation Setup](#) for browser/device behavior such as the register assigned to the current workstation.

- Use [Users and Access](#) and [Supervisors](#) for identity, permissions, and protected override authority.
- Use [Custom Fields](#) only when the business needs information that is not already represented by a supported Brisk field.

Data import

Use [Data Import](#) for supported master-data and historical-data migrations. Inspect columns, identifiers, dates, relationships, and run counts before applying changes. Use bundle export/import for controlled transfer of selected configuration between Brisk instances; a setup bundle is not a complete disaster-recovery backup.

Backup and support operations

Authorized administrators can use Data Backup to download Brisk's database and media as separate artifacts, then store them outside the application server and test recovery. Its instructions and the additional restricted maintenance tools are available only to BookStack users who have been granted staff-documentation access. Those tools can change system-wide behavior and belong in a documented maintenance window.

Change controls

Record the reason, prior value, new value, owner, and validation step for material system changes. Test integrations, printing, payment, email, hardware, and accounting behavior after changing their settings. Never place passwords, API secrets, encryption keys, or private credentials in screenshots, documentation, or source control.