Setup

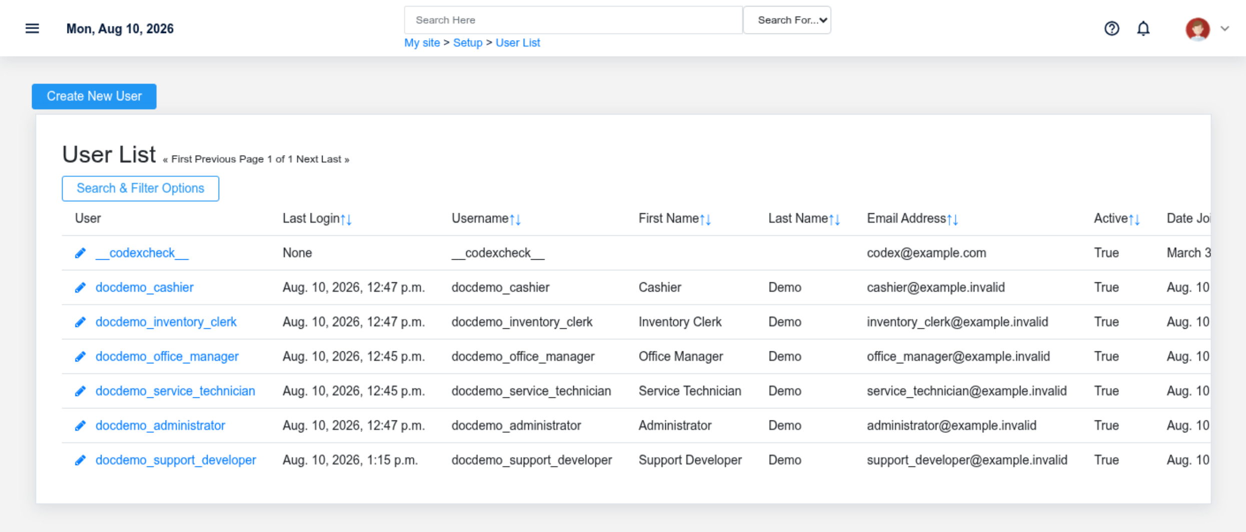
Brisk managed documentation

Start Here

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.

Core Records

Navigation Menus

Navigation Menus

Purpose and when to use this record

Configure which Brisk module groups and favorites appear in a named navigation menu.

At a glance

- **Identify it by: Name**.
- **Why care:** Setup changes can alter navigation, alerts, and authorization for many users. Test the effect with the intended role or device before broad use.

Before you begin

You need the Brisk permission for the action you are taking on navigation menus. 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 Navigation Menu

Save Cancel

Navigation Menu Entry - New Navigation Menu

Name

Description

Show Favorites ☑

Show Sales ☑

Show Ecommerce ☑

Show Inventory ☑

Show Accounting ☑

Show Manufacturing ☑

Show Management ☑

Show Reports ☑

Show Setup ☑

Show Service ☑

Show Time ☑

Show Payroll ☑

Show Law Enforcement ☑

Show Municipal ☑

Show Multi-Store ☑

Favorite Links

Label	URL	Order	Delete
			✖
			✖
			✖

Add Row

Sales Links

Label	URL	Order	Delete
			✖
			✖
			✖

Add Row

Ecommerce Links

Label	URL	Order	Delete
			✖
			✖
			✖

Add Row

Inventory Links

Label	URL	Order	Delete
			✖
			✖
			✖

Add Row

Accounting Links

Label	URL	Order	Delete
			✖
			✖
			✖

Add Row

Manufacturing Links

Label	URL	Order	Delete
			✖
			✖

The Navigation Menus create screen in the Brisk documentation demo.

Create a Navigation Menu 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 **Show Favorites**, **Show Sales**, **Show Ecommerce**, **Show Inventory**, **Show Accounting**, and **Show Manufacturing**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Navigation Menu, then confirm **Name** on its detail page before continuing.

After saving: Open **Menu Links** and confirm the Navigation Menu 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 Navigation Menu

Delete this Navigation Menu 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 **Menu Links**. 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 Navigation Menus list and make sure only the intended Navigation Menu was removed.

Review Navigation Menu details

Use the detail page as the shared record of what this Navigation Menu currently means. Verify **Name**, **Description**, **Show Favorites**, and **Show Sales** before relying on it for a decision.

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

Next check: Open **Menu Links** and confirm the Navigation Menu appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

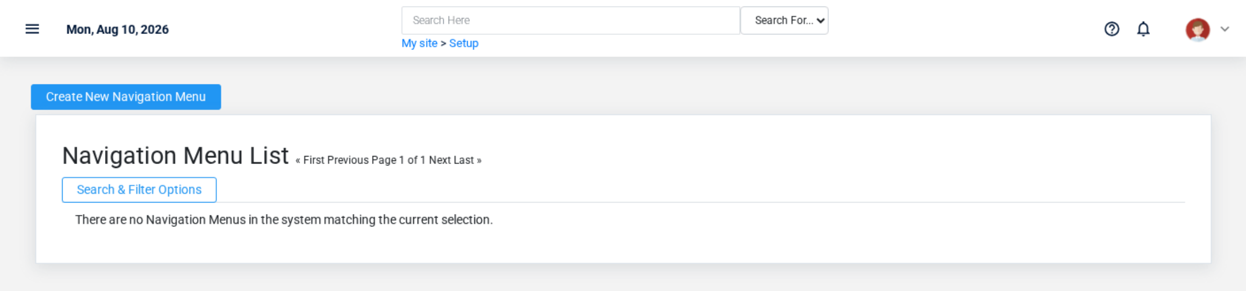
Edit an existing Navigation Menu

Edit this Navigation Menu 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 **Show Accounting**. These values are most likely to change navigation, notifications, access, and other users’ behavior.
3. Save the change, return to the list, and confirm that the Navigation Menu now appears under the expected **Name**.

After the change: Open **Menu Links** and confirm the Navigation Menu appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review navigation menus



The Navigation Menus list screen in the Brisk documentation demo.

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

- The initial order emphasizes **Id**. Select a column heading when you need a different comparison.

Open the Navigation Menu 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.

Fields and business rules

Brisk stores 17 user-relevant fields for this Navigation Menu, 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 navigation menu.
Description	No	Leave any notes about this menu here.
Show Favorites	No	Show or hide the favorites submenu.
Show Sales	No	Show or hide the sales submenu.
Show Ecommerce	No	Show or hide the ecommerce submenu.
Show Inventory	No	Show or hide the inventory submenu.
Show Accounting	No	Show or hide the accounting submenu.
Show Manufacturing	No	Show or hide the manufacturing submenu.
Show Management	No	Show or hide the management submenu.
Show Reports	No	Show or hide the reports submenu.
Show Setup	No	Show or hide the setup submenu.
Show Service	No	Show or hide the service submenu.
Show Time	No	Show or hide the time submenu.
Show Payroll	No	Show or hide the payroll submenu.
Show Law Enforcement	No	Show or hide the law enforcement submenu.
Show Municipal	No	Show or hide the municipal submenu.
Show Multi-Store	No	Show or hide the multi-store submenu.

What happens next

Open **Menu Links** and confirm the Navigation Menu 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 Navigation Menu with the source document or approved setup decision, then check the downstream screen where it is used.

Notifications

Notifications

Purpose and when to use this record

Review an individual user alert, its urgency, destination, delivery content, and dismissed state.

At a glance

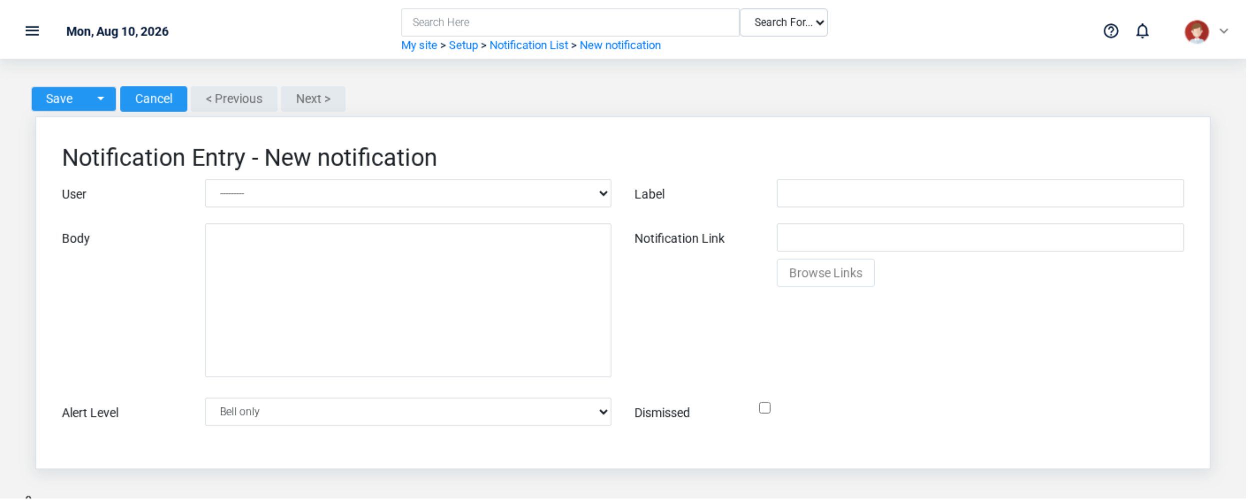
- **Identify it by: User**, **Label**, **Body**, and **Notification Link**.
- **Check its business context: User**.
- **Why care:** Setup changes can alter navigation, alerts, and authorization for many users. Test the effect with the intended role or device before broad use.

Before you begin

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

Have valid **User** records ready first. Those selections determine where this notification belongs and which later screens can find it.

Create a notification



The Notifications create screen in the Brisk documentation demo.

Create a notification 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: **User**.
2. Enter the required identifying and operational values: **User**, **Label**, and **Body**.
3. Review **Alert Level**, and **Dismissed** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the notification, then confirm **User**, **Label**, **Body**, **Notification Link**, **Alert Level**, and **Dismissed** on its detail page before continuing.

After saving: Verify this notification 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 notification

Delete this notification 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 **User**, **Label**, **Body**, and **Notification Link**. After confirmation, return to the Notifications list and make sure only the intended notification was removed.

Review notification details

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

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

Next check: Verify this notification 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.

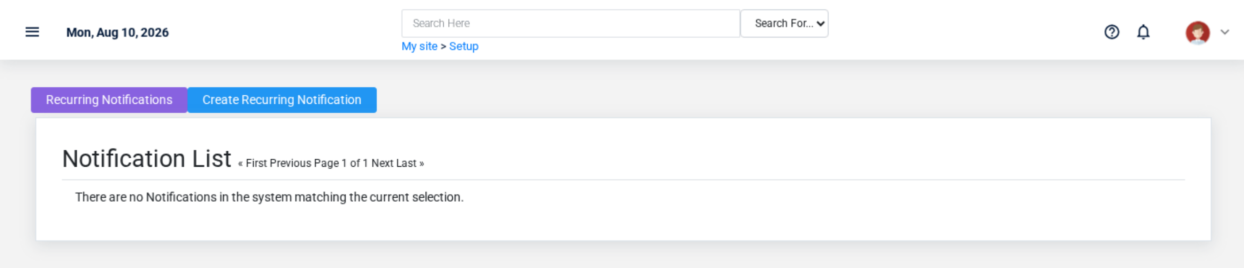
Edit an existing notification

Edit this notification 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 **User** with the supporting document or approved request.
2. Recheck **Alert Level**. These values are most likely to change navigation, notifications, access, and other users' behavior.
3. Save the change, return to the list, and confirm that the notification now appears under the expected **Alert Level**.

After the change: Verify this notification 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 notifications



The Notifications list screen in the Brisk documentation demo.

Use the Notifications list to find the correct record before opening or changing it. Compare **User**, **Label**, **Body**, and **Notification Link**. Records with similar names or numbers can still belong to different **User**.

Open the notification whose **User**, **Label**, **Body**, and **Notification Link** match the task. If it is missing, clear the list filters and recheck **Alert Level** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 6 user-relevant fields for this notification, including 1 linked-record selection and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
User	Yes	The user that this notification is for.
Label	Yes	The title or description of this notification.
Body	Yes	The message delivered by this notification.
Notification Link	No	The destination that this notification will direct to.
Alert Level	No	Controls the notification delivery intensity. Available values: Bell only, Blocking popup, Popup and email.
Dismissed	No	Once dismissed, this notification will be marked as read and will not be highlighted or contribute to the list of unread notifications.

What happens next

Verify this notification 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 **User**, **Label**, and **Body** 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:** Open **User** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Push Subscriptions

Push Subscriptions

Purpose and when to use this record

Review and manage the browser or device endpoint used to deliver push notifications to a user.

At a glance

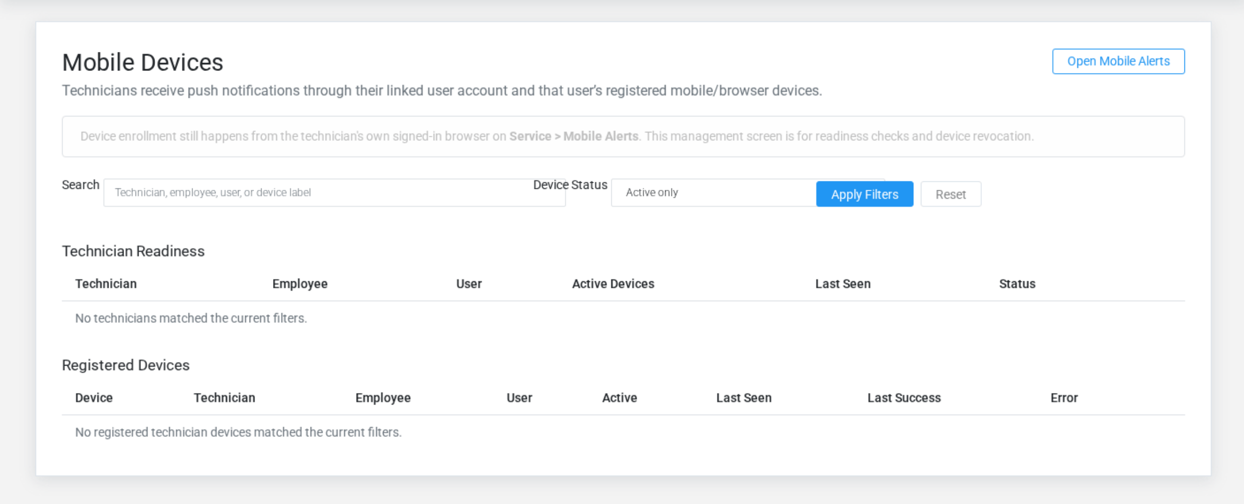
- **Identify it by: Device Label**.
- **Check its business context: User**.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on push subscriptions. 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.

Have valid **User** records ready first. Those selections determine where this Push Subscription belongs and which later screens can find it.

Find and review push subscriptions



The Push Subscriptions list screen in the Brisk documentation demo.

Use the Push Subscriptions list to find the correct record before opening or changing it. Compare **User**, **Endpoint**, **P256Dh Key**, and **Auth Key**. Records with similar names or numbers can still belong to different **User**.

Open the Push Subscription whose **User**, **Endpoint**, **P256Dh Key**, and **Auth Key** 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 9 user-relevant fields for this Push Subscription, 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
User	Yes	The user associated with this push subscription.
Endpoint	Yes	The endpoint recorded for this push subscription.
P256Dh Key	Yes	The p256dh key recorded for this push subscription.
Auth Key	Yes	The auth key recorded for this push subscription.
Device Label	No	The device label recorded for this push subscription.
User Agent	No	The user agent recorded for this push subscription.

Field	Required	What it controls
Active	No	Whether this push subscription is active and available for use.
Last Success At	No	Date and time recorded for last success at on this push subscription.
Last Error	No	The last error recorded for this push subscription.

What happens next

Test the Push Subscription from its intended client and allowed network with only the granted capabilities, then document its owner and rotation date in the organization’s secure credential inventory.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **User**, **Endpoint**, **P256Dh Key**, and **Auth Key** 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 **User** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Recurring Notifications

Recurring Notifications

Purpose and when to use this record

Schedule a repeated alert for selected recipients with a weekly, monthly, quarterly, or annual cadence.

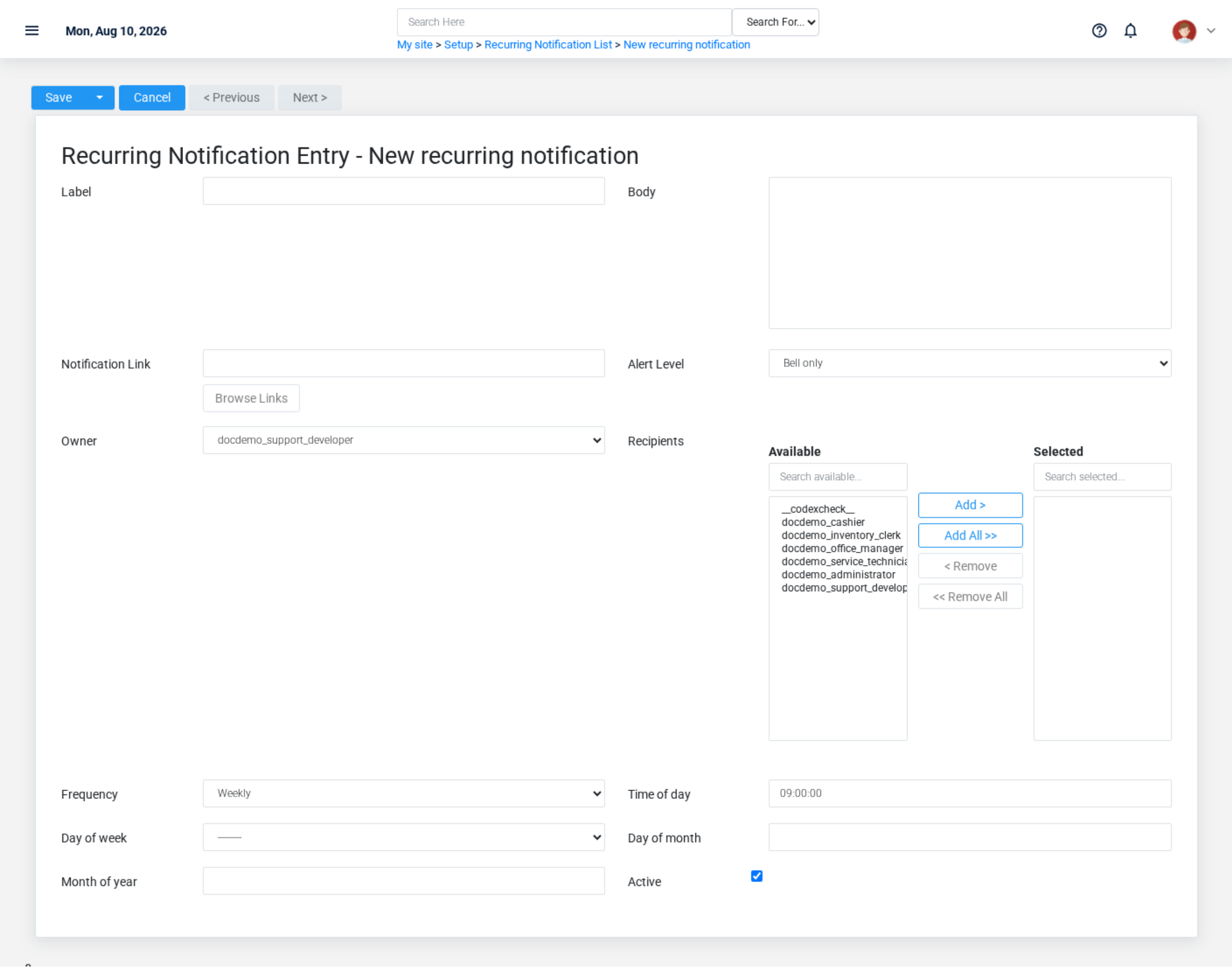
At a glance

- **Identify it by: Label**, **Body**, **Notification Link**, and **Alert Level**.
- **Check its business context: Owner**.
- **Why care:** Setup changes can alter navigation, alerts, and authorization for many users. Test the effect with the intended role or device before broad use.
- **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 recurring notifications. 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 recurring notification



The Recurring Notifications create screen in the Brisk documentation demo.

Create a recurring notification 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: **Owner**.
2. Enter the required identifying and operational values: **Label**, and **Body**.
3. Review **Alert Level**, **Frequency**, **Day Of Week**, and **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the recurring notification, then confirm **Label**, **Body**, **Notification Link**, **Alert Level**, **Owner**, and **Recipients**, plus the remaining screen fields on its detail page before continuing.

After saving: Verify this recurring notification 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 recurring notification

Delete this recurring notification 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.

On the confirmation page, verify **Label**, **Body**, **Notification Link**, and **Alert Level**. After confirmation, return to the Recurring Notifications list and make sure only the intended recurring notification was removed.

Review recurring notification details

Use the detail page as the shared record of what this recurring notification currently means. Verify **Alert Level**, **Frequency**, **Day Of Week**, and **Active** before relying on it for a decision.

Follow **Owner** to determine whether the issue is on this recurring notification or on one of those linked records.

Next check: Verify this recurring notification 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.

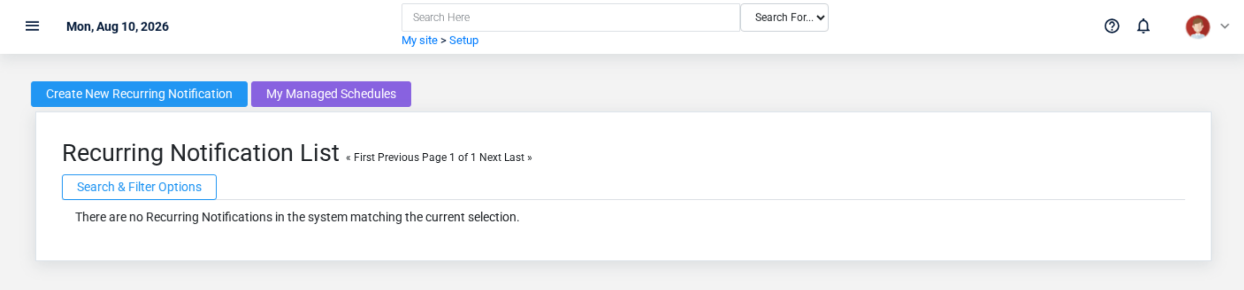
Edit an existing recurring notification

Edit this recurring notification 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 **Owner** with the supporting document or approved request.
2. Recheck **Alert Level**, **Frequency**, **Day Of Week**, and **Active**. These values are most likely to change navigation, notifications, access, and other users’ behavior.
3. Save the change, return to the list, and confirm that the recurring notification now appears under the expected **Alert Level**, **Frequency**, **Day Of Week**, and **Active**.

After the change: Verify this recurring notification 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 recurring notifications



The Recurring Notifications list screen in the Brisk documentation demo.

Use the Recurring Notifications list to find the correct record before opening or changing it. Compare **Label**, **Body**, **Notification Link**, and **Alert Level**. Records with similar names or numbers can still belong to different **Owner**.

Open the recurring notification whose **Label**, **Body**, **Notification Link**, and **Alert Level** match the task. If it is missing, clear the list filters and recheck **Alert Level**, **Frequency**, **Day Of Week**, and **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 13 user-relevant fields for this recurring notification, including 1 linked-record selection and 3 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Label	Yes	The title or description of this notification.
Body	Yes	The message delivered by this notification.
Notification Link	No	The destination that this notification will direct to.
Alert Level	No	Controls the notification delivery intensity. Available values: Bell only, Blocking popup, Popup and email.
Owner	No	User who manages this recurring notification.
Frequency	No	How often this notification repeats. Available values: Weekly, Monthly, Quarterly, Annually.
Time Of Day	No	Time of day to deliver the notification.
Day Of Week	No	Required for weekly schedules. Available values: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday.

Field	Required	What it controls
Day Of Month	No	Required for monthly, quarterly, and annual schedules.
Month Of Year	No	Starting month for quarterly schedules (runs every 3 months from this month) or the month for annual schedules.
Next Run At	No	Next scheduled delivery time.
Last Sent At	No	Last time this notification was delivered.
Active	No	Disable to pause this recurring notification.

What happens next

Verify this recurring notification 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 **Label**, and **Body** 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 **Alert Level**, **Frequency**, **Day Of Week**, and **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 **Owner** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Supervisor Logs

Supervisor Logs

Purpose and when to use this record

Audit a supervisor-override attempt, including the user, screen, object, override type, and authorization result.

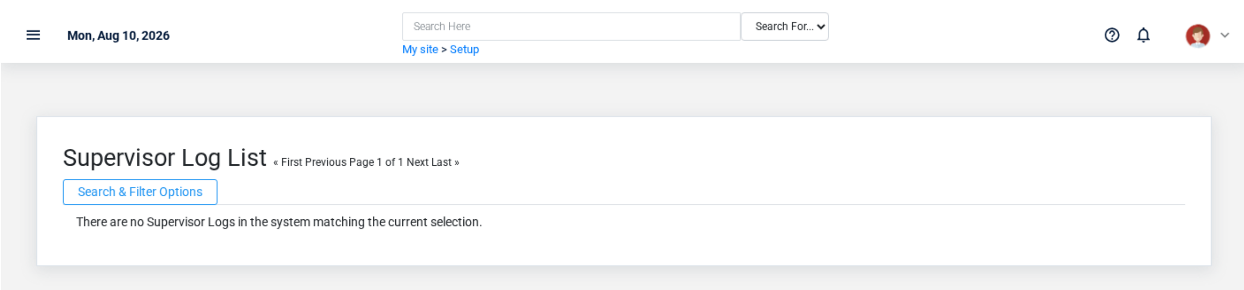
At a glance

- **Identify it by: Supervisor**, **User**, **Initials Entered**, and **Screen**.
- **Check its business context: Supervisor**, **User**, and **Content Type**.
- **Why care:** Setup changes can alter navigation, alerts, and authorization for many users. Test the effect with the intended role or device before broad use.

Before you begin

You need the Brisk permission for the action you are taking on supervisor logs. 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 supervisor logs



The Supervisor Logs list screen in the Brisk documentation demo.

Use the Supervisor Logs list to find the correct record before opening or changing it. Compare **Supervisor**, **User**, **Initials Entered**, and **Screen**. Records with similar names or numbers can still belong to different **Supervisor**, **User**, and **Content Type**.

- The initial order emphasizes **Id**. Select a column heading when you need a different comparison.

Open the supervisor log whose **Supervisor**, **User**, **Initials Entered**, and **Screen** 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 9 user-relevant fields for this supervisor log, including 3 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
Supervisor	No	The supervisor associated with this supervisor log.
User	No	The user associated with this supervisor log.
Initials Entered	No	The initials entered recorded for this supervisor log.
Screen	Yes	The screen recorded for this supervisor log.
Content Type	No	The content type associated with this supervisor log.
Object Id	No	The object ID value recorded for this supervisor log.
Authorized	No	Whether the authorized option applies to this supervisor log.
Override Type	No	The override type recorded for this supervisor log.
Memo	No	The memo recorded for this supervisor log.

What happens next

Use **Supervisor**, **User**, and **Content Type** to interpret this supervisor log. If it records a failure or exception, correct the source process and create a new successful event rather than rewriting the audit trail.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Screen** 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:** Open **Supervisor**, **User**, and **Content Type** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Supervisors

Supervisors

Purpose and when to use this record

Grant a supervisor only the override categories they are allowed to authorize with their protected credentials.

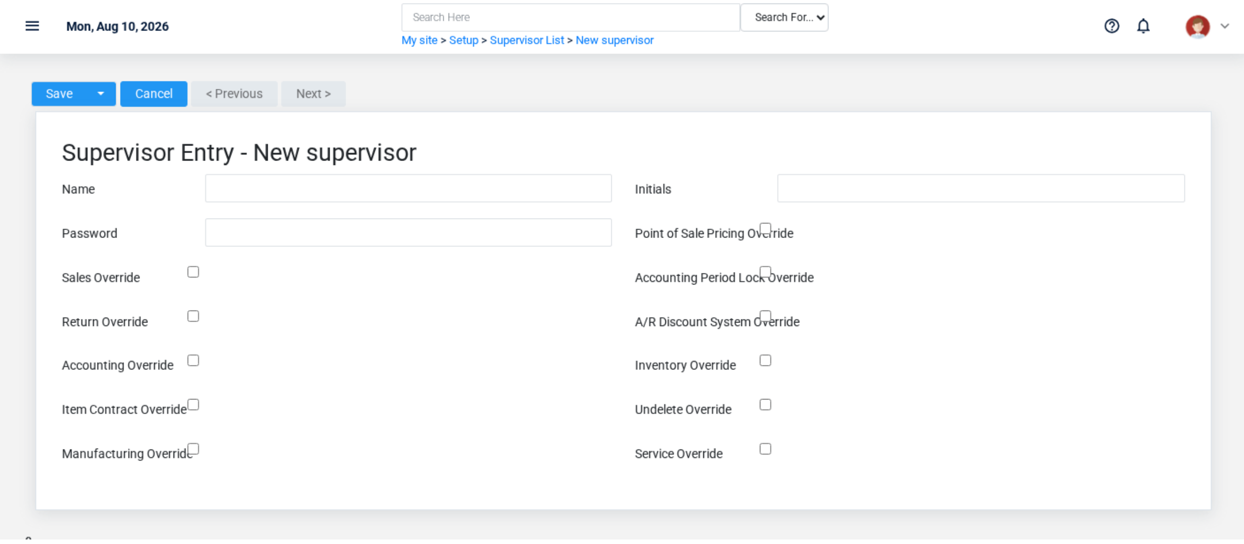
At a glance

- **Identify it by: Name**.
- **Why care:** Setup changes can alter navigation, alerts, and authorization for many users. Test the effect with the intended role or device before broad use.

Before you begin

You need the Brisk permission for the action you are taking on supervisors. 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 supervisor



The Supervisors create screen in the Brisk documentation demo.

Create a supervisor 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: **Name**, **Initials**, and **Password**.
3. Review **Point Of Sale Pricing Override**, **Sales Override**, **Return Override**, **Accounting Period Lock Override**, **A/R Discount System Override**, and **Accounting Override**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the supervisor, then confirm **Name** on its detail page before continuing.

After saving: Verify this supervisor in **Supervisor Logs** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Review supervisor details

Use the detail page as the shared record of what this supervisor currently means. Verify **Name**, **Initials**, **Password**, and **Point Of Sale Pricing Override** before relying on it for a decision.

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

Next check: Verify this supervisor in **Supervisor Logs** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

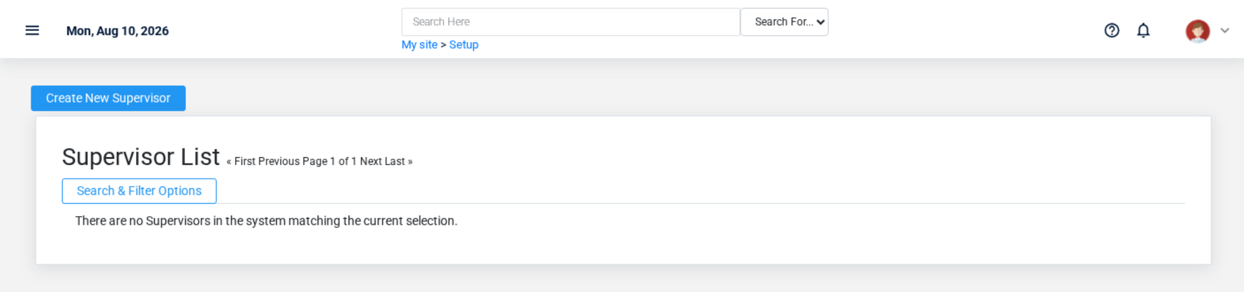
Edit an existing supervisor

Edit this supervisor 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 **Name** with the supporting document or approved request.
2. Recheck **Accounting Period Lock Override**, and **Accounting Override**. These values are most likely to change navigation, notifications, access, and other users' behavior.
3. Save the change, return to the list, and confirm that the supervisor now appears under the expected **Name**.

After the change: Verify this supervisor in **Supervisor Logs** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review supervisors



The Supervisors list screen in the Brisk documentation demo.

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

- The initial order emphasizes **Id**. Select a column heading when you need a different comparison.

Open the supervisor 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.

Fields and business rules

Brisk stores 15 user-relevant fields for this supervisor, 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 supervisor.

Field	Required	What it controls
Initials	Yes	The initials recorded for this supervisor.
Password	Yes	The password recorded for this supervisor.
Point Of Sale Pricing Override	No	Whether the point of sale pricing override option applies to this supervisor.
Sales Override	No	Whether the sales override option applies to this supervisor.
Return Override	No	Whether the return override option applies to this supervisor.
Accounting Period Lock Override	No	Whether the accounting period lock override option applies to this supervisor.
A/R Discount System Override	No	Whether the a/r discount system override option applies to this supervisor.
Accounting Override	No	Whether the accounting override option applies to this supervisor.
Inventory Override	No	Whether the inventory override option applies to this supervisor.
Item Contract Override	No	Whether the item contract override option applies to this supervisor.
Undelete Override	No	Whether the undelete override option applies to this supervisor.
Manufacturing Override	No	Whether the manufacturing override option applies to this supervisor.
Service Override	No	Whether the service override option applies to this supervisor.
Time Override	No	Whether the time override option applies to this supervisor.

What happens next

Verify this supervisor in **Supervisor Logs** 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 **Name**, **Initials**, and **Password** 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 supervisor with the source document or approved setup decision, then check the downstream screen where it is used.