

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.

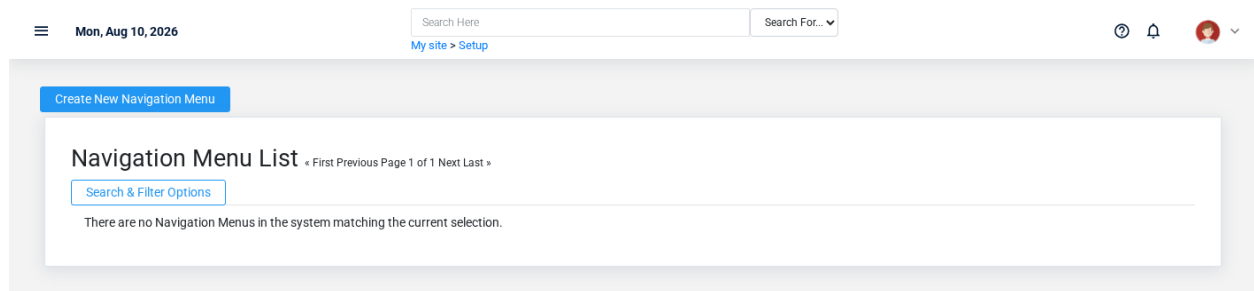
Edit an existing Navigation Menu

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.
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