

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.

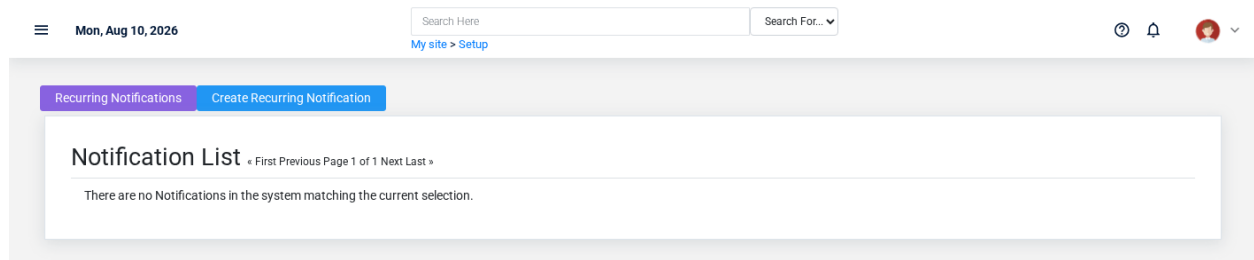
Edit an existing notification

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.

Revision #3

Created 2026-08-10 16:10:01 UTC by Brisk

Updated 2026-08-10 20:30:54 UTC by Brisk