Credit Card Accounts

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Purpose and when to use this record

Connect a business credit card to its payable account, issuing institution, and vendor used for statement charges and finance costs.

At a glance

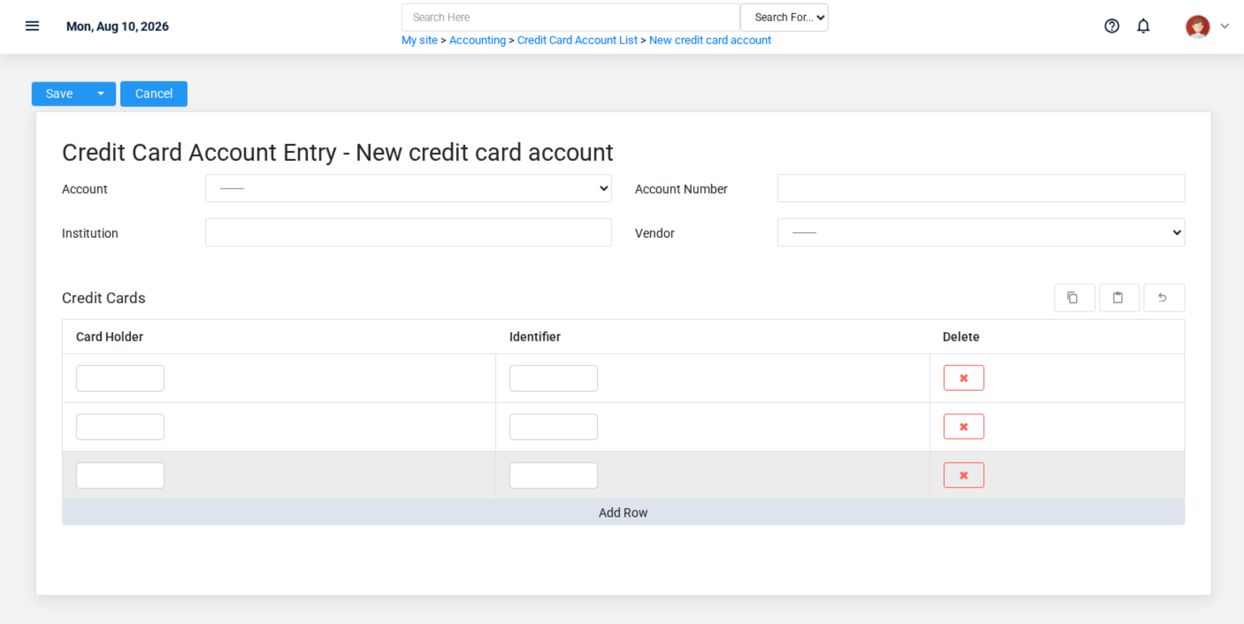
- **Identify it by: Account Number**.
- **Check its business context: Account**, and **Vendor**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.

Before you begin

You need the Brisk permission for the action you are taking on credit card accounts. 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 **Account** records ready first. Those selections determine where this credit card account belongs and which later screens can find it.

Create a credit card account



The Credit Card Accounts create screen in the Brisk documentation demo.

Create a credit card account 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: **Account**, and **Vendor**.
2. Enter the required identifying and operational values: **Account**.
3. Review **Account Number**, and **Institution** against the source document or approved setup decision.
4. Save the credit card account, then confirm **Account Number** on its detail page before continuing.

After saving: Open **Credit Card Charges**, and **Credit Cards** and confirm the credit card account 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 credit card account

Delete this credit card account 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 **Credit Card Charges**, and **Credit Cards**. 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 **Account Number**. After confirmation, return to the Credit Card Accounts list and make sure only the intended credit card account was removed.

Review credit card account details

Use the detail page as the shared record of what this credit card account currently means. Verify **Account**, **Account Number**, **Institution**, and **Vendor** before relying on it for a decision.

Follow **Account**, and **Vendor** to determine whether the issue is on this credit card account or on one of those linked records.

Next check: Open **Credit Card Charges**, and **Credit Cards** and confirm the credit card account appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

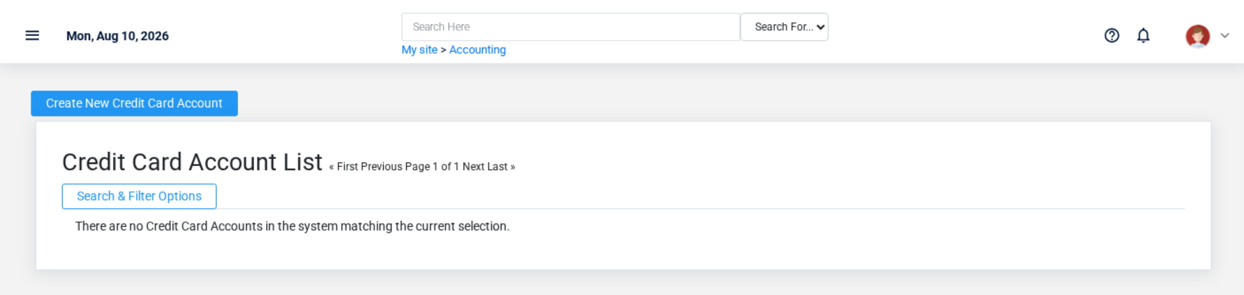
Edit an existing credit card account

Edit this credit card account 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 **Account**, and **Vendor** with the supporting document or approved request.
2. Recheck **Account**, **Account Number**, and **Vendor**. These values are most likely to change account balances, financial periods, and statement results.
3. Save the change, return to the list, and confirm that the credit card account now appears under the expected **Account Number**.

After the change: Open **Credit Card Charges**, and **Credit Cards** and confirm the credit card account 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 credit card accounts



The Credit Card Accounts list screen in the Brisk documentation demo.

Use the Credit Card Accounts list to find the correct record before opening or changing it. Compare **Account Number**. Records with similar names or numbers can still belong to different **Account**, and **Vendor**.

Open the credit card account whose **Account Number** 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 4 user-relevant fields for this credit card account, including 2 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
Account	Yes	Select the payable account that represents this credit card.
Account Number	No	The account number recorded for this credit card account.
Institution	No	The institution value recorded for this credit card account.
Vendor	No	Sets the vendor associated with this credit card; handles accounting transactions for finance charges and other fees.

What happens next

Open **Credit Card Charges**, and **Credit Cards** and confirm the credit card account 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 **Account** 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 **Account**, and **Vendor** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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