Debit Cards

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Purpose and when to use this record

Identify the debit cards and bank-payment methods available when recording withdrawals from a bank account.

At a glance

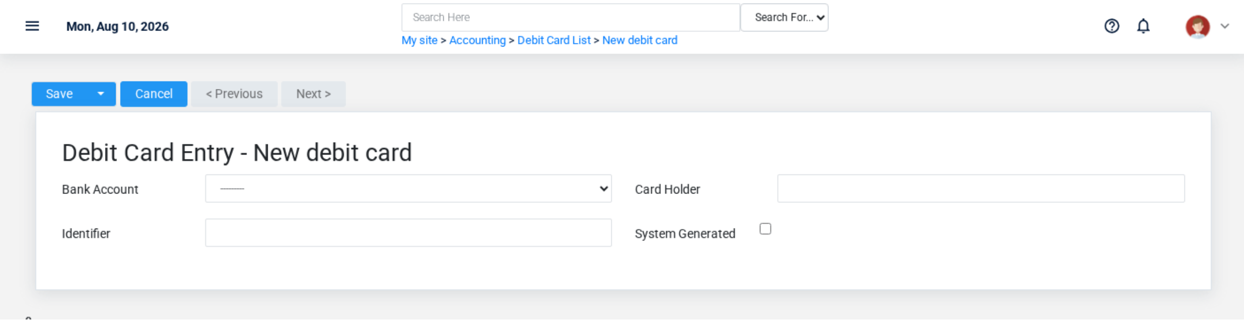
- **Identify it by: Bank Account**, **Card Holder**, **Identifier**, and **System Generated**.
- **Check its business context: Bank Account**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing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

Before you begin

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

Create a debit card



The Debit Cards create screen in the Brisk documentation demo.

Create a debit card 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: **Bank Account**.
2. Enter the required identifying and operational values: **Bank Account**, **Card Holder**, and **Identifier**.
3. Review **System Generated** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the debit card, then confirm **Bank Account**, **Card Holder**, **Identifier**, and **System Generated** on its detail page before continuing.

After saving: Open **Payment Cards** and confirm the debit card 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 debit card

Delete this debit card 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 **Payment 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 **Bank Account**, **Card Holder**, **Identifier**, and **System Generated**. After confirmation, return to the Debit Cards list and make sure only the intended debit card was removed.

Review debit card details

Use the detail page as the shared record of what this debit card currently means. Verify **Bank Account**, **Card Holder**, **Identifier**, and **System Generated** before relying on it for a decision.

Follow **Bank Account** to determine whether the issue is on this debit card or on one of those linked records.

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

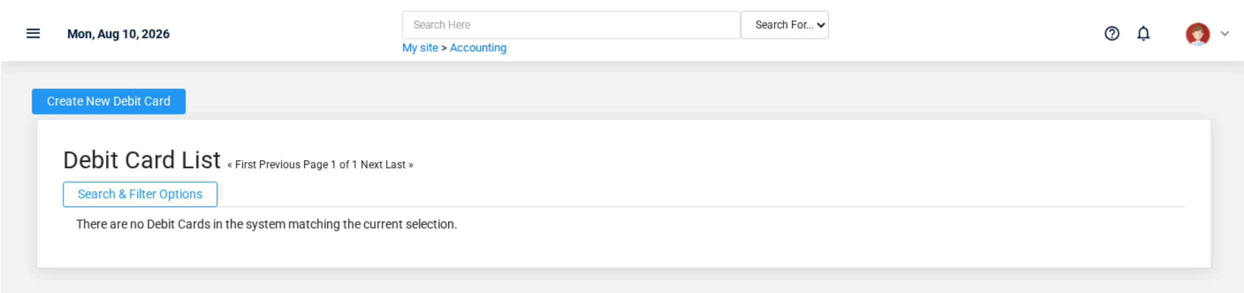
Edit an existing debit card

Edit this debit card 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 **Bank Account** with the supporting document or approved request.
2. Recheck **Bank Account**. 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 debit card now appears under the expected the identifying information shown on the screen.

After the change: Open **Payment Cards** and confirm the debit card 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 debit cards



The Debit Cards list screen in the Brisk documentation demo.

Use the Debit Cards list to find the correct record before opening or changing it. Compare **Bank Account**, **Card Holder**, **Identifier**, and **System Generated**. Records with similar names or numbers can still belong to different **Bank Account**.

Open the debit card whose **Bank Account**, **Card Holder**, **Identifier**, and **System Generated** 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 debit card, 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
Bank Account	Yes	Connects this debit card to the bank account it draws from.
Card Holder	Yes	Enter the name of the card holder on this account.
Identifier	Yes	Enter some identifying information for this card, such as its last 4 digits or a shorthand nickname.
System Generated	No	Represents payment by bank without debit card for use by checkbook system.

What happens next

Open **Payment Cards** and confirm the debit card 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 **Bank Account**, **Card Holder**, and **Identifier** 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 **Bank Account** 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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