Municipal Accounts

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Purpose and when to use this record

Maintain the account through which a person or business’s municipal charges, filings, payments, and balance are tracked.

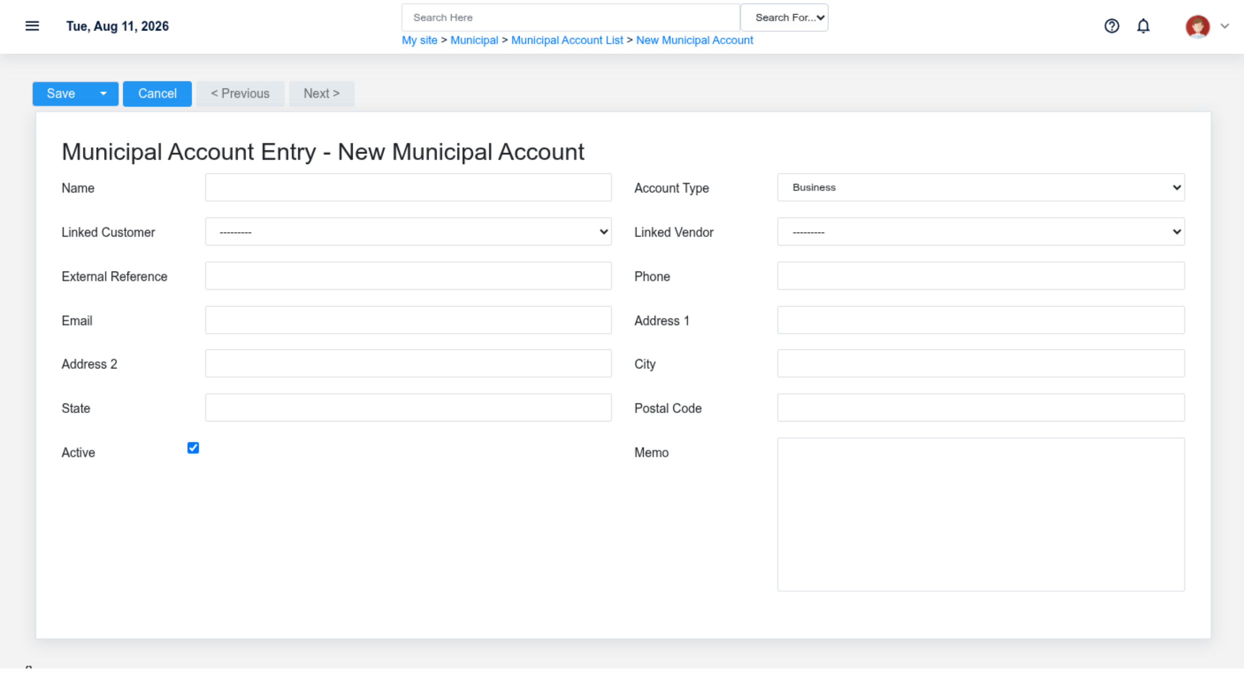
At a glance

- **Identify it by: Name**, and **Postal Code**.
- **Check its business context: Linked Customer**, and **Linked Vendor**.
- **Why care:** Names, periods, classifications, due dates, status, charges, and payments form an official account history. Correct them from the supporting filing, application, receipt, or ordinance.
- **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 municipal 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.

Create a Municipal Account



The Municipal Accounts create screen in the Brisk documentation demo.

Create a Municipal Account only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Linked Customer**, and **Linked Vendor**.
2. Enter the required identifying and operational values: **Name**.
3. Review **Account Type**, and **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Municipal Account, then confirm **Name**, and **Postal Code** on its detail page before continuing.

After saving: Verify **Account Type**, **Active**, **Linked Customer**, and **Linked Vendor** on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

Delete a Municipal Account

Delete this Municipal Account only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Cemetery Plots**, **Compliance Tasks**, **Interments**, **License Applications**, and **Licenses**, plus the remaining screen fields. 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**, and **Postal Code**. After confirmation, return to the Municipal Accounts list and make sure only the intended Municipal Account was removed.

Review Municipal Account details

Use the detail page as the shared record of what this Municipal Account currently means. Verify **Account Type**, and **Active** before relying on it for a decision.

Follow **Linked Customer**, and **Linked Vendor** to determine whether the issue is on this Municipal Account or on one of those linked records.

Next check: Verify **Account Type**, **Active**, **Linked Customer**, and **Linked Vendor** on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

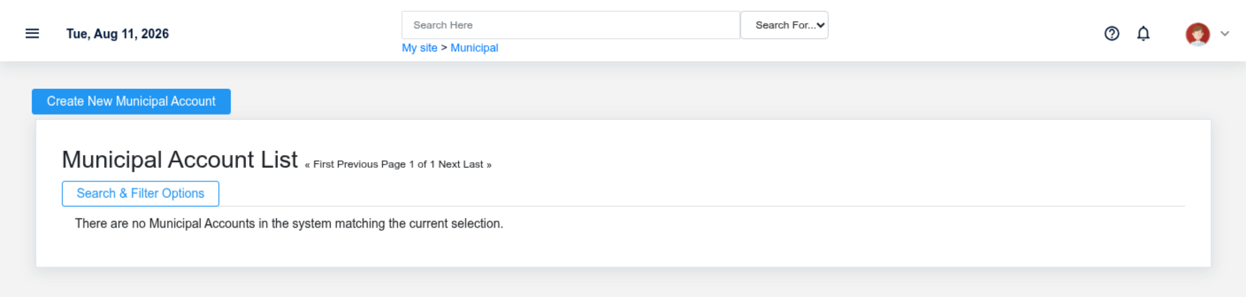
Edit an existing Municipal Account

Edit this Municipal Account to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Linked Customer**, and **Linked Vendor** with the supporting document or approved request.
2. Recheck **Account Type**, **Linked Customer**, **Linked Vendor**, and **Active**. These values are most likely to change license, compliance, filing, charge, payment, and official account history.
3. Save the change, return to the list, and confirm that the Municipal Account now appears under the expected **Account Type**, and **Active**.

After the change: Verify **Account Type**, **Active**, **Linked Customer**, and **Linked Vendor** on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

Find and review municipal accounts



The Municipal Accounts list screen in the Brisk documentation demo.

Use the Municipal Accounts list to find the correct record before opening or changing it. Compare **Name**, and **Postal Code**. Records with similar names or numbers can still belong to different **Linked Customer**, and **Linked Vendor**.

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

Open the Municipal Account whose **Name**, and **Postal Code** match the task. If it is missing, clear the list filters and recheck **Account Type**, and **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 14 user-relevant fields for this Municipal Account, including 2 linked-record selections 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
Name	Yes	Human-readable name for this account.
Account Type	No	The account type recorded for this account. Available values: Business, Individual, Organization.
Linked Customer	No	The linked customer associated with this account.
Linked Vendor	No	The linked vendor associated with this account.
External Reference	No	The external reference recorded for this account.
Phone	No	The phone recorded for this account.
Email	No	Email address recorded as email for this account.
Address 1	No	The address 1 recorded for this account.
Address 2	No	The address 2 recorded for this account.
City	No	The city recorded for this account.
State	No	The state recorded for this account.
Postal Code	No	The postal code recorded for this account.

Field	Required	What it controls
Active	No	Whether this account is active and available for use.
Memo	No	The memo recorded for this account.

What happens next

Verify **Account Type**, **Active**, **Linked Customer**, and **Linked Vendor** on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

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 record saved but is not available where expected:** Recheck **Account Type**, 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 **Linked Customer**, and **Linked 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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