Municipal Charges

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Purpose and when to use this record

Assess a fee, penalty, tax, or other amount to a municipal account with a due date and source.

At a glance

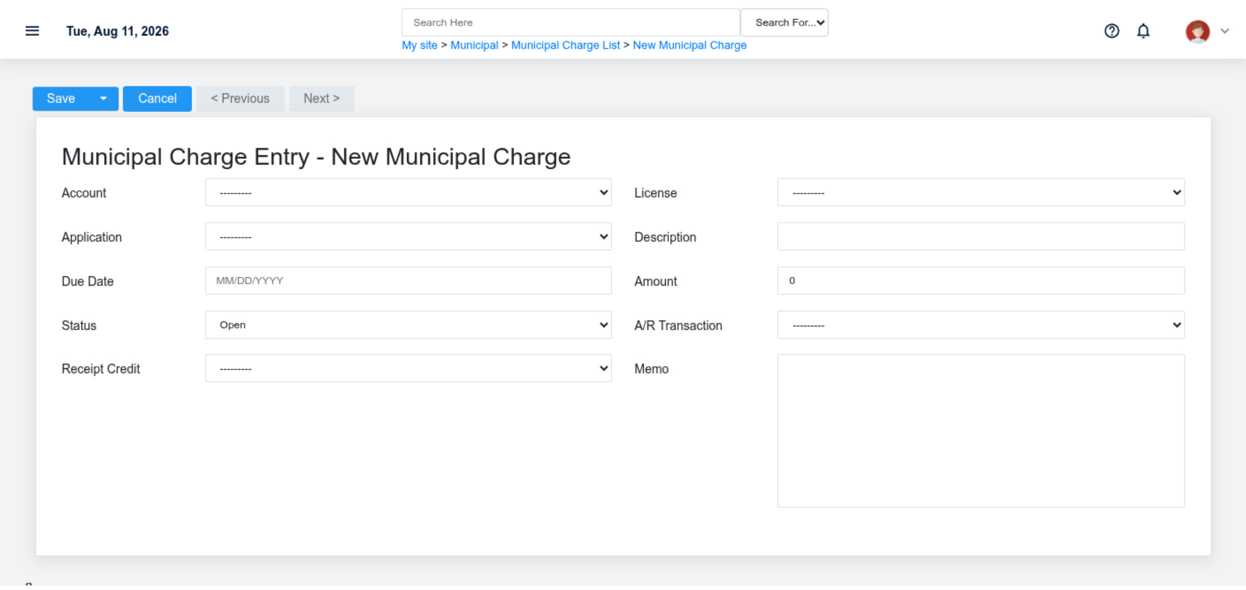
- **Identify it by: Due Date**, and **Status**.
- **Check its business context: Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit**.
- **Why care:** Names, periods, classifications, due dates, status, charges, and payments form an official account history. Correct them from the supporting filing, application, receipt, or ordinance.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on municipal charges. 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 Municipal Charge belongs and which later screens can find it.

Create a Municipal Charge



The Municipal Charges create screen in the Brisk documentation demo.

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

1. Select the business context first: **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit**.
2. Enter the required identifying and operational values: **Account**, and **Description**.
3. Review **Status** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Municipal Charge, then confirm **Due Date**, and **Status** on its detail page before continuing.

After saving: Verify **Status**, **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** 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 Charge

Delete this Municipal Charge 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.

On the confirmation page, verify **Due Date**, and **Status**. After confirmation, return to the Municipal Charges list and make sure only the intended Municipal Charge was removed.

Review Municipal Charge details

Use the detail page as the shared record of what this Municipal Charge currently means. Verify **Due Date**, **Amount**, and **Status** before relying on it for a decision.

Follow **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** to determine whether the issue is on this Municipal Charge or on one of those linked records.

Next check: Verify **Status**, **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** on the detail page, then continue the municipal workflow only when those values agree with the source document and actual work performed.

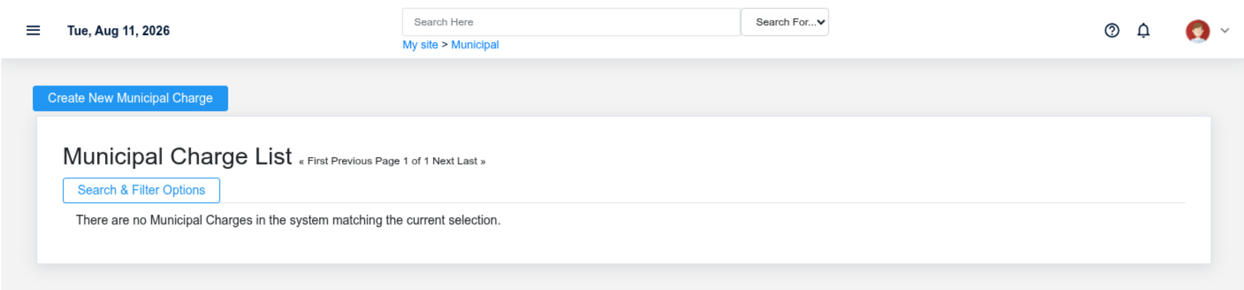
Edit an existing Municipal Charge

Edit this Municipal Charge 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 **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** with the supporting document or approved request.
2. Recheck **Account**, **Due Date**, **Amount**, **Status**, and **Receipt Credit**. 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 Charge now appears under the expected **Status**.

After the change: Verify **Status**, **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** 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 charges



The Municipal Charges list screen in the Brisk documentation demo.

Use the Municipal Charges list to find the correct record before opening or changing it. Compare **Due Date**, and **Status**. Records with similar names or numbers can still belong to different **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit**.

- The initial order emphasizes **Due Date**, and **Id**. Select a column heading when you need a different comparison.

Open the Municipal Charge whose **Due Date**, and **Status** match the task. If it is missing, clear the list filters and recheck **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 10 user-relevant fields for this Municipal Charge, including 5 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
Account	Yes	The account associated with this charge.
License	No	The license associated with this charge.
Application	No	The application associated with this charge.
Description	Yes	Description of this charge.
Due Date	No	Date recorded for due date on this charge.
Amount	No	The amount value recorded for this charge.
Status	No	Current status of this charge. Available values: Open, Partially Paid, Paid, Waived, Written Off.
A/R Transaction	No	The a/r transaction associated with this charge.
Receipt Credit	No	The receipt credit associated with this charge.
Memo	No	The memo recorded for this charge.

What happens next

Verify **Status**, **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** 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 **Account**, and **Description** 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 **Status**, 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 **Account**, **License**, **Application**, **A/R Transaction**, and **Receipt Credit** 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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