Payment Plans

Payment Plans

Purpose and when to use this record

Review legacy or provider-managed amount, cadence, duration, and processor identifiers. These records are reference-only in Brisk-managed billing mode; use Customer Receivable Payment Plans for supported scheduled collection.

At a glance

- **Identify it by: Name**, and **Start Date**.
- **Why care:** Customer, source document, amount, authorization, processor status, and settlement are separate controls. Verify all of them before retrying or treating a payment as complete.
- **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 payment plans. 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.

Why Create is unavailable

The Create route deliberately returns to the Payment Plans list with a message that gateway-managed plans are not Brisk's primary billing path. Brisk also does not create autonomous gateway plans from ordinary model saves. To schedule collection against a customer's receivable balance, create a **Customer Receivable Payment Plan** with an authorized stored method, amount, and next-run date.

Delete a Payment Plan

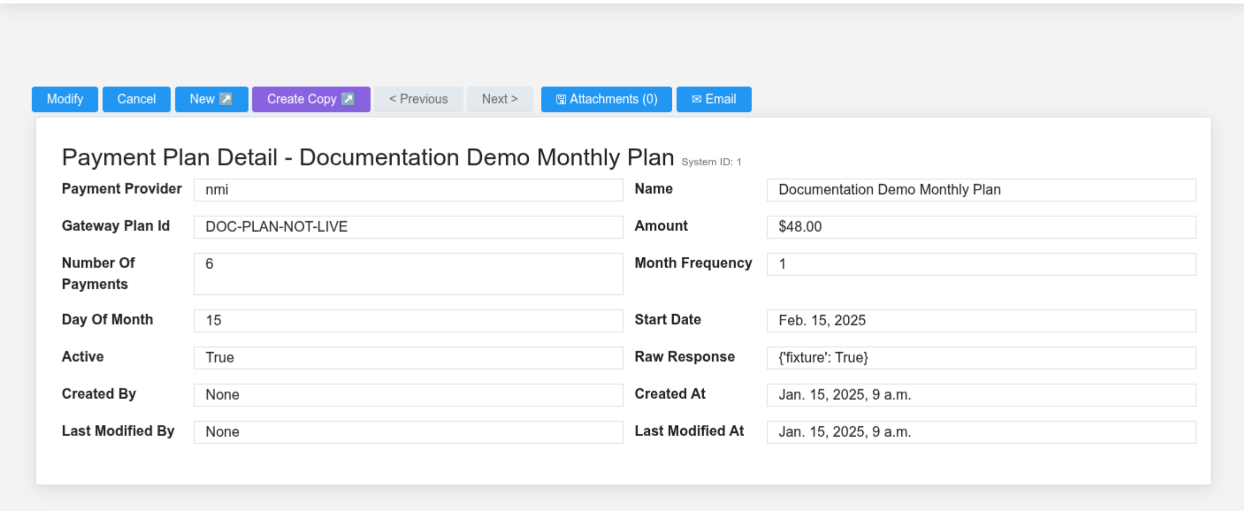
Delete this Payment Plan only when it was entered by mistake and no downstream history depends on it. Preserve the gateway request and result; void, refund, cancel, or replace it through the supported processor-aware workflow.

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

Before confirming, check for related **Payment Subscriptions**. 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 **Start Date**. After confirmation, return to the Payment Plans list and make sure only the intended Payment Plan was removed.

Review Payment Plan details



The Payment Plans detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this Payment Plan currently means. Verify **Payment Provider**, **Amount**, **Start Date**, and **Active** before relying on it for a decision.

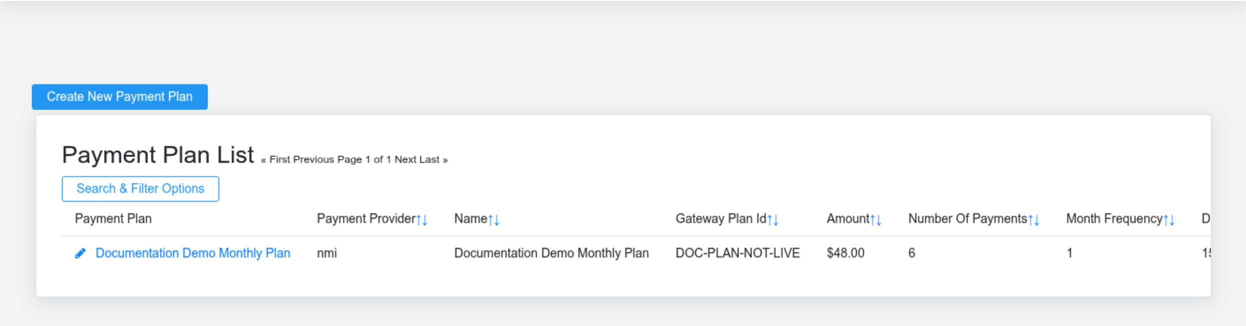
Compare the Payment Plan with its source document or approved setup request before deciding that it needs correction.

Next check: Apply the plan only to customers whose authorization and collection terms match it, and review generated activity for failures or duplicate schedules.

Why editing is unavailable

The Edit route also returns to the list because these provider-managed records are read-only in Brisk-managed billing mode. Do not try to change cadence or amount by editing the database or processor ID. Determine whether the authoritative schedule is in the processor, a Sales Subscription, or a Customer Receivable Payment Plan, then use that workflow's supported change or cancellation process.

Find and review payment plans



The Payment Plans list screen in the Brisk documentation demo.

Use the Payment Plans list to find the correct record before opening or changing it. Compare **Name** , and **Start Date**. Compare the full identifier rather than relying on a similar name.

Open the Payment Plan whose **Name**, and **Start Date** match the task. If it is missing, clear the list filters and recheck **Payment Provider**, and **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 10 user-relevant fields for this Payment Plan, including 0 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
Payment Provider	No	The payment provider recorded for this payment plan. Available values: NMI, eBizCharge.
Name	Yes	Human-readable name for this payment plan.
Gateway Plan Id	No	Provider plan identifier.
Amount	No	The amount value recorded for this payment plan.
Number Of Payments	No	Use 0 for until canceled.

Field	Required	What it controls
Month Frequency	No	The month frequency value recorded for this payment plan.
Day Of Month	No	The day of month value recorded for this payment plan.
Start Date	No	Date recorded for start date on this payment plan.
Active	No	Whether this payment plan is active and available for use.
Raw Response	No	Structured raw response data stored for this payment plan.

What happens next

Use this page to identify a legacy/provider plan. Operate new receivable schedules through Customer Receivable Payment Plans and new sales billing through Sales Subscriptions.

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 **Payment Provider**, and **Active**, then clear the filters on the destination list. Those controls determine payment authorization, collection timing, customer balances, and settlement review even when the other fields saved successfully.
- **The values look right but the result is wrong:** Compare this Payment Plan with the source document or approved setup decision, then check the downstream screen where it is used.

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