

Subscriptions

Subscriptions

Purpose and when to use this record

Define a repeating customer sale, billing frequency, line items, and whether payment is direct or posted to receivables.

At a glance

- **Identify it by: Label.**
- **Check its business context: Customer,** and **Payment Method.**
- **Why care:** Customer, warehouse, quantities, prices, tax, payment, and fulfillment represent different parts of the transaction. Review each before treating the sale as complete.

Before you begin

You need the Brisk permission for the action you are taking on subscriptions. 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 **Customer** records ready first. Those selections determine where this subscription belongs and which later screens can find it.

Create a subscription

Before confirming, check for related **Recurring Sales**, and **Subscription Rows**. 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 **Label**. After confirmation, return to the Subscriptions list and make sure only the intended subscription was removed.

Review subscription details

Use the detail page as the shared record of what this subscription currently means. Verify **Frequency**, **Billing Mode**, **Subtotal**, **Tax Total**, and **Total** before relying on it for a decision.

Follow **Customer**, and **Payment Method** to determine whether the issue is on this subscription or on one of those linked records.

Next check: Monitor each generated billing cycle and resolve failed direct payments or receivable balances without creating duplicate subscriptions.

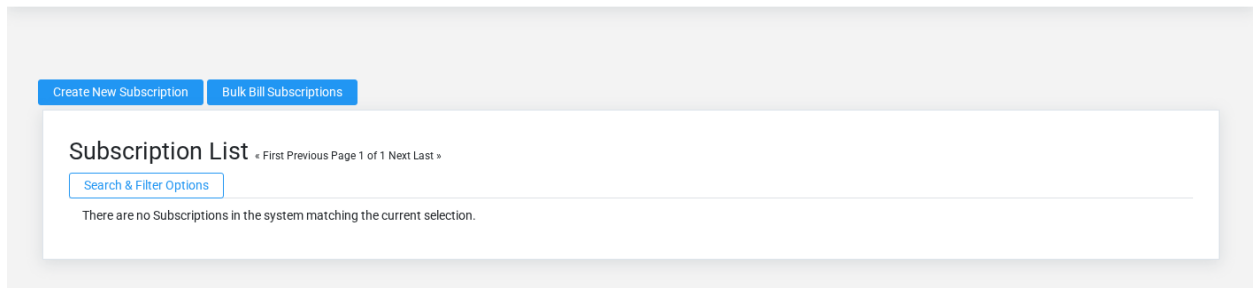
Edit an existing subscription

Edit this subscription to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Customer**, and **Payment Method** with the supporting document or approved request.
2. Recheck **Frequency**, **Customer**, **Billing Mode**, **Subtotal**, **Tax Total**, and **Total**. These values are most likely to change customer totals, tax, payment, fulfillment, and receivables.
3. Save the change, return to the list, and confirm that the subscription now appears under the expected **Frequency**, and **Billing Mode**.

After the change: Monitor each generated billing cycle and resolve failed direct payments or receivable balances without creating duplicate subscriptions.

Find and review subscriptions



The Subscriptions list screen in the Brisk documentation demo.

Use the Subscriptions list to find the correct record before opening or changing it. Compare **Label**, **Frequency**, **Customer**, and **Billing Mode**. Records with similar names or numbers can still belong to different **Customer**, and **Payment Method**.

- Keyword search checks **Memo**, and **Label**.
- Narrow the list with **Customer** filters.
- The date filter uses **Datecreated**; choose a range that matches the business event you are reconciling.

Open the subscription whose **Label**, **Frequency**, **Customer**, and **Billing Mode** match the task. If it is missing, clear the list filters and recheck **Customer**, **Datecreated**, **Frequency**, and **Billing Mode** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this subscription, including 2 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Label	Yes	A label to identify this subscription in the business.
Frequency	No	Determines the frequency with which a subscription should occur. Available values: Daily, Weekly, Bimonthly, Monthly, Quarterly, Biannually, Annually.
Customer	Yes	The customer that made this purchase.
Billing Mode	No	Controls whether subscription billing charges a stored payment method or posts to receivables. Available values: Charge Customer Account, Direct Pay When Available, Direct Pay Required.

Field	Required	What it controls
Payment Method	No	Stored card or ACH method used when this subscription is direct billed.
Memo	No	An open text field for employees to make notes about this transaction.
Subtotal	No	The total sales price of all line items before sales tax.
Tax Total	No	The total sales tax due for this sale.
Total	No	The total value recorded for this subscription.

What happens next

Monitor each generated billing cycle and resolve failed direct payments or receivable balances without creating duplicate subscriptions.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Label**, and **Customer** 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 **Customer**, and **Payment Method** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3

Created 2026-08-10 16:09:43 UTC by Brisk

Updated 2026-08-10 20:30:10 UTC by Brisk