create new, edit, delete

You can access this item in the menu under *Sales/contribution types/articles/...create, edit, delete.* Make sure that you are in a contribution account, e.g. *CLUB* or *GMBH.*

The	following	window	shows	you the	article	overview
me	TOHOWING	window	5110105	you the	article	overview.

ruppe B						1	6	✓ <u>0</u> k	
	lezeichnung	Datum 5	5 Nett	o . Brut	tto. Si	Jkz	2	+ Neu	F9
AUFN	Aufnahmegebühr Rate <n> von <t></t></n>		S	500.00	500.00	aufn			
	Einzahlung		N	0.00	0.00	einz	-3	Edit	E.
JBEI	Jahresb. Student / Azubi	01.01.20	J	100.00	100.00	jstu	4	🗍 Löschen	FS
JBEI	Jahresbeitrag Aktive		Ν	250.00	250.00	jakt		Q. Suchen	
JBEI	Jahresbeitrag Jugendliche	01.01.20	J	50.00	50.00	jjug		<u>,</u>	
JBEI	Jahresbeitrag Junioren	01.01.20	J	70.00	70.00	jjun		() <u>W</u> eiter	F
JBEI	Jahresbeitrag Passiv	01.01.20	J	50.00	50.00	jpas			
JBEI	Monatsbeitrag		Ν	0.00	0.00	MB			
MIET	Elektro Caddie Box	01.11.20	1	92.59	100.00	Cad2			
NENN	Startgeld		N	0.00	0.00	NENN			
VERB	ASG-Beitrag	01.01.20	J	20.00	20.00	asg			
VERB	LGV-Beitrag	01.01.20	J	10.00	10.00	nrw			
VP	Verzehrpauschale Erwachsene		N	0.00	0.00	VP			
ZAHL	Banküberweisung		Т	0.00	0.00	b			
ZAHL	Barzahlung		т	0.00	0.00	bar			
ZAHL	Euro-Card		Т	0.00	0.00	ec	•		

- 1. With **OK** to close the window.
- 2. Create an article here **New** (F9) here.
- 3. Select an item and click on *Edit* (F7) to edit it.
- 4. **Delete** (F5) to delete an article.

Delete You can only delete an item if it is not posted in the current account area. If you want to delete items from older years, you can only do this as part of an archiving at the turn of the year.

General article settings

Beitrags-Typ									?	×
– Suchkürzel, Na	me, Statu	s ——							_	
1 K <u>ü</u> rzel	jakt		Konto-Nr.	(Fib	u):			•	=	•
Gruppe	JBEI	Jahres	beitrag		* N	leu Lö:	sch.			
N <u>a</u> me	Name Jahresbeitrag Aktive						+	<u>N</u> eu		
<u>F</u> älligkeit	<u>F</u> ālligkeit Leer = Buchungstag					~	<u>S</u> ichern	F11		
<u>S</u> tatus	Status J - Jährlich 🔻						۵	<u>L</u> öschen	F5	
2 MwSt: 0.0	Betrag 1250.00 Brutto: 1250.00 MwSt: 0.0 % Netto: 1250.00									
3 Nur Mitglieder	/ Gäste	Mit	glieder und	l Gās	ste		-			
Gefülltes Infofe	eld			-	Filter			📉 <u>Z</u> uordnen		
				Ŧ	Filter					
				Ŧ	Filter			-	Drucken	c0
Geschlecht	t	nur	1, 2				≡	- B	Dideken	ro
Altersklass	e	nur					≡			
Mitgliedsc	haft	nur	2, 4, 6				≡			
Status		nur	1, 2				≡			
Verschiede	enes	nur					≡	₽	<u>E</u> nde	

1. Fill in all fields under **Search abbreviation**, **name**, **status**, **product group** fields. Search abbreviations have 4 letters in contribution accounts.

Keep the abbreviations simple and don't think about them for long, you don't need to memorise them. Create new merchandise categories: Product groups The following article statuses are available: J= annual, I = info contribution (for caddy boxes and cloakrooms), M = monthly, N = normal, one-off, E = one-off, special (e.g. special levies), T = text contribution (all payment types), S = total query, V = note

- 2. Here you can enter the *amount* in gross. The net amount is then calculated automatically.
- 3. The *Automatic contribution allocation* determines to whom the article is explicitly assigned.

Practical articles are shown and explained below.

Articles for contribution accounts

Annual article

Beitrags-Typ		? ×							
_ Suchkürzel, Name, Status		4 – N							
K <u>ü</u> rzel jstu	Konto-Nr. (Fibu):	4 = ▶							
Gruppe JBEI	Jahresbeitrag 💌 Neu Lösch.	1.0							
N <u>a</u> me Jahresb.	Student / Azubi	- <u>h</u> en							
<u>F</u> älligkeit 01.01.22	Leer = Buchungstag	✓ <u>S</u> ichern F11							
<u>S</u> tatus J - Jährli	ch 🔽	III Löschen 55							
Betrag		in <u>coscien</u> ra							
MwSt: 0.0 % Netto	<u>M</u> wSt: 0.0 % Ne <u>t</u> to: 100.00 <u>B</u> rutto: 100.00								
Automatische Beitrags-Zu	Jordnung								
Nur Mitglieder / Gäste	Mitglieder und Gäste 💌	∛ Zuordoen							
Gefülltes Infofeld	Zahlweise 👻 Filter J	Zuorunen							
	▼ Filter								
	▼ Filter	Drucken F8							
Geschlecht	nur 1, 2 📃								
Altersklasse	nur								
Mitgliedschaft	nur 1 🔳								
Status	nur þ								
Verschiedenes	nur 📃	→ Ende							

The **status** "Annually" ensures that this item is posted to the accounts with the automatic contribution allocation is posted to the accounts once a year.

The "Payment method" with the *filter* "Y" is only necessary if there are also monthly instalment payers for this example membership "Full member single". If this is not the case, you do not necessarily need to fill in this item.

However, it is important that "Members only" is set (so that members who have left are no longer assigned the item) and that the membership characteristic and usually also the contribution status are ticked appropriately.

Monthly article

If you have members who pay a monthly instalment by direct debit, for example, you need monthly articles.

Beitrags-Typ		? ×						
⊢ Suchkürzel, Name, Statu	s							
K <u>ü</u> rzel mon	Konto-Nr. (Fibu):	4 ≡ ▶						
Gruppe JBEI	Jahresbeitrag 🔻 Neu Lösch.	1.11						
N <u>a</u> me Monatsr	+ Nen							
<u>F</u> älligkeit	✓ <u>S</u> ichern F11							
<u>S</u> tatus M - Mo	Status M - Monatlich							
Betrag								
<u>M</u> wSt: 0.0 % Ne <u>t</u> to	: 100.00 <u>B</u> rutto: 100.00							
Automatische Beitrags-Z	uordnung							
Nur Mitglieder / Gäste	Mitglieder und Gäste 🔹	i% Zuordoen						
Gefülltes Infofeld	Zahlweise 🔻 Filter M	≫ <u>∠</u> uoranen						
	▼ Filter							
	▼ Filter	Drucken F8						
Geschlecht	nur 1, 2 📃	1 <u></u>						
Altersklasse	nur							
Mitgliedschaft	nur 7 🗮							
Status	nur 📃							
Verschiedenes	nur 📃	→ <u>E</u> nde						
	_							

With the *status* "Monthly" status ensures that these articles can be posted 12 times a year (every month) to the persons concerned using the automatic contribution allocation. This means that the monthly collection can also be controlled later and the items can be posted through to 31 December of a year: Monthly allocation

The "Payment method" here with "M" for monthly, ensures in the item setting that only persons entered in the **Bank** field are set to "monthly payment" are booked in for this article; the membership variant must of course also match the person: Person bank data

One-off article

Beitrags-Typ			? ×				
– Suchkürzel, Name, Statu	5		4 – N				
K <u>ü</u> rzel aufn	Konto-Nr. (Fibu):		4 ≡ ▶				
Gruppe AUFN	Aufnahmegebührer 💌	Neu Lösch.	1.0				
N <u>a</u> me Aufnahr	N <u>a</u> me Aufnahmegebühr + <u>N</u> eu						
<u>F</u> älligkeit	Leer = Buchungstag		✓ <u>S</u> ichern F11				
Status N - No	Status N - Normal, einmalig						
- Betrag			in <u>c</u> oscient 15				
MwSt: 0.0 % Netto	: 5000.00 <u>B</u> rutte	0: 5000.00					
Automatische Beitrags-Z	uordnung						
Nur Mitglieder / Gäste	Mitglieder und Gäste	-	🕺 Zuordnen				
Gefülltes Infofeld	▼ Fil	ter	200runen				
	▼ Fil	ter					
	▼ Fil	ter	Drucken F8				
Geschlecht	nur	=					
Altersklasse	nur	=					
Mitgliedschaft	Mitgliedschaft nur						
Status	Status nur						
Verschiedenes	=	→ <u>E</u> nde					

The "Status" is set to "normal" for this item. As this item is always posted to the account individually when a person joins, you do not need to select anything under "Automatic contribution allocation".

Post articles individually to the account: Edit accounts

Post articles individually to the account as instalments: Individual instalments

Articles for cabinets and caddie boxes

🔮 Beitrags-T	Тур							- 🗆 ×
Suchkürzel,	Name, Status	Betrag						4 ··· }
Kürzel	boel Konto-Nr. (Fibu)	MwSt 19,0 %						
Name	Caddiebox Elektro	Netto 126,	05					
Gruppe	CADD Caddieboxen 💌 🕂 🧨	Brutto 150,	00					✓ <u>S</u> ichern F11
Status	I - Info-Beitrag, jährlich 🔹	Fälligkeit 01.01.20						🗍 Löschen F5
Info		Automatische Beitra	gs-Zuor	dnung				습 Kopieren
Information	A	Nur Mitglieder/Gäste	Mit	Mitglieder und Gäste 💌		-	🛃 Konto	
		gefülltes Infofeld	Box	Boxen 💌 Filter EL			💥 Zuordnen	
					r Filter			🖶 Dauskaa – 💷
					Filter			<u>, a D</u> rucken F8
	~							
Intern	^	Geschlecht:	nur				\equiv	
		Altersklasse:	nur				\equiv	
		Mitgliedsstatus: nur		\equiv				
		Beitragsstatus:	nur				\equiv	
	~	Unbenutzt:	nur				\equiv	→ Ende

The *status* "Info contribution annual" ensures that the box number is also printed on the invoice with the automatic contribution allocation.

The box number should also be entered in the account, as this is the only way that the allocation works if someone has rented 2 boxes (with the automatic contribution allocation, PC CADDIE can only recognise that this item should be in the account twice with a box number in the account on the same date).

In our example, all persons who have rented an electric caddie box are booked the article. The box number must also have an "EL" in the number, which could mean that the box has an electrical connection and therefore costs more than, for example, a box with the identifier "K" (how small).

Read more about this under: Lockers and caddie boxes

Article with components

Your annual contribution also includes the DGV contribution, for example. However, both items refer to a different FIBU account. And you do not want to list the DGV contribution separately on the invoice.

Please speak to your tax advisor beforehand, because if the items have different VAT rates, it will NO LONGER be OK to summarise them on the invoice!

In the main article, enter <+> and in the component ##.

Beitrags-Typ ? X									
Suchkürzel, Name, Statu	;								
Kürzel zusa	Konto-Nr. (Fib	u): 1234	4 = P						
Gruppe JBEI	Jahresbeitrg	 Neu Lösch. 	Law						
Name Jahresbe	itrag <+>		+ Nen						
Fälligkeit	Leer = Buchungsta	g	✓ <u>S</u> ichern F11						
Status J - Jährl	Status J - Jährlich 💌								
Betrag	Betrag								
MwSt: 19,0 % Netto	MwSt: 19,0 % Netto: 840,34 Brutto: 1000,00								
Automatische Beitrags-Z	uordnung								
Nur Mitglieder / Gäste	nur Mitglieder	Ŧ	💥 Zuordnen						
Gefülltes Infofeld	T	Filter	v _						
	•	Filter							
	•	Filter	🔒 Drucken 🛛 F8						
Geschlecht	nur								
Altersklasse	nur								
Mitgliedschaft	nur 1								
Status	nur								
Beitragsstatus	nur		➡ <u>E</u> nde						
L									

Beitrags-Typ					?	×	
Suchkürzel, Na	me, Status –						
Kürzel	dgv	Konto-Nr.	(Fibu): 5678	3	4 = P	2	
Gruppe	VERB V	erbandbeitrag	ösch.	1.0			
Name	DGV Beit	g ##			+ <u>N</u> eu		
Fälligkeit	•••	Leer = Buchur	ngstag		✓ <u>S</u> ichern F1	1	
Status	Status J - Jährlich 💌						
Betrag							
MwSt: 19,0	% Netto:	8,40	Brutto: 10,00	2			
Automatische I	Beitrags-Zuo	rdnung					
Nur Mitglieder	/ Gäste	nur Mitglieder		-	X Zuordnen		
Gefülltes Infof	eld		➡ Filter				
			▼ Filter				
			➡ Filter		Drucken F8	3	
Geschlecht	t ni	ur					
Altersklass	ie nu	ur 2, 3, 4, 5, 0	6	≡			
Mitgliedsc	haft ni	Jr					
Status	nı	ur					
Beitragssta	atus nu	ur			➡ <u>E</u> nde		
L							

After the automatic contribution allocation, the sales account looks like this:

U	msatzko	onto - GMBH					? _ ×
	Bitschene	, Jochen (bijo)					< <u>≡</u>)
	Ξ	Information	Datum	Zeit S	Netto	Brutto OK	
	zusa	Jahresbeitrag	01.01.21	J	840,34	1000,00	
	dgv	DGV Beitrag ##	01.01.21	J	8,40	10,00	
							••• Beitr <u>T</u> yp F7
							∕ ^ <u>Ä</u> ndern
							ញ <u>ិ S</u> torno F5
							💥 Zuordnen
							<u>B</u> ezahlen
							Drucken F8
	zusa	JBEI_Jahresbeitrag <+>	01.01.21	J	840,34	1000,00 💌	
					0,00 0,00 848,74	0,00 0,00 1010,00	<u></u> Ende

And on the invoice it looks like this:

	Leistungsart		Netto/€	Brutto/€
01	Jahresbeitrag		848,74	1010,00
	enthaltene Mwst. 19,0%:	€ 161,26	848,74	1010,00

Totalise items on invoice

If, contrary to our recommendation, you would like to print the monthly contributions in an annual invoice and do not want the items to appear individually on the invoice, you can have them added together on the invoice as follows.

Enter the following after the name of the item <+A>++ after the name of the item:

Beitrags-Typ									? X
Suchkürzel, Na	me, Status	;						4	
Kürzel	mona	Konto-Nr. (Fibu): 8081						۹ :	
Gruppe	MONA	MONA Monatsbeiträge 💌 Neu Lösch.							
Name	Monatsb	Monatsbeitrag <+A>++							
Fälligkeit	keit Leer = Buchungstag							✓ <u>S</u> iche	ern F11
Status	Status M - Monatlich 💌							🗍 Lösc	hen F5
Betrag									
MwSt: 19,0	% Netto	: 8	83,19	В	rutto:	99,00			
-Automatische l	Beitrags-Zu	Jordnu	ing						
Nur Mitglieder	/ Gäste	nur	Mitglieder				-	× Zuor	dnen
Gefülltes Infofe	eld	Zah	lweise	•	Filter	м		E E E E E E E E E E E E E E E E E E E	
				•	Filter				
				۳	Filter				ken F8
Geschlecht	t	nur						_	
Altersklass	e	nur							
Mitgliedsc	haft	nur	A						
Status		nur							
Beitragssta	atus	nur	1					<u></u> <u> </u>	•
							1		

After the automatic contribution allocation, the sales account looks like this:

Umsatzkonto - CLUB ? _ X							
	Bitschene	, Jochen (bijo)					 ■ ▶
	Ξ	Information	Datum Zeit	S	Netto	Brutto OK	
	mona	Monatsbeitrag	01.01.21	М	83,19	99,00	A Beitr.Wahl F2
	mona	Monatsbeitrag	01.02.21	м	83,19	99,00	
	mona	Monatsbeitrag	01.03.21	М	83,19	99,00	•••• Beitr <u>T</u> yp F7
	mona	Monatsbeitrag	01.04.21	М	83,19	99,00	
	mona	Monatsbeitrag	01.05.21	М	83,19	99,00	∕ ^* <u>Ä</u> ndern
	mona	Monatsbeitrag	01.06.21	М	83,19	99,00	ার্টি <u>S</u> torno F5
	mona	Monatsbeitrag	01.07.21	М	83,19	99,00	
	mona	Monatsbeitrag	01.08.21	М	83,19	99,00	% Zuordnen
	mona	Monatsbeitrag	01.09.21	м	83,19	99,00	
	mona	Monatsbeitrag	01.10.21	м	83,19	99,00	S Rezablen
	mona	Monatsbeitrag	01.11.21	м	83,19	99,00	B, Desament
	mona	Monatsbeitrag	01.12.21	м	83,19	99,00	
							✓ Drucken F8
	mona	MONA Monatsheitrag <+4>++	01 01 21	м	83.19	99.00	-
	mona	money_monesocidag size :			03,15	55,00	
					1.128,48 1.320,00	1.320,00 0,00	
					1.852,52_	2.138,00	<u>L</u> → <u>E</u> nde

And on the invoice it looks like this:

Leistungsart		Einzel/€	Netto/€	Brutto/€
Jochen Bitschene 12 x Monatsbeitrag		99,00	998,28	1.188,00
enthaltene Mwst. 19,0%:	€ 189,72		998,28	1.188,00

Annually increasing contributions

The following consideration: You offer a membership form that costs €80 per month in the first year, €100 per month in the second year and €120 per month in the third year. The items can be allocated as follows.

Create three articles in our example: Monthly contribution taster year 1, here it is important that the "Entry date" is filled with 0-0 in the "Filled info field". This causes PCC to recognise that this contribution is due in the first contribution year, i.e. months 0-12.

Fee type X				
Abbreviation, Name, S	-Abbreviation, Name, Status			
Abbreviation ani0	Account No.:			
Article group ANNF	group ANNF Annual fee 💽 New Del.			
N <u>a</u> me Taster y	ear 1	ew <u>N</u> ew		
Due date	Empty = Present date	✓ <u>Save</u> F11		
Status M - Mor	nthly 🔽	X Delete F5		
Amount	00.00 Carry 00.00			
<u>V</u> .A.1.: [0.0 % Ne <u>c</u>	<u>80.00</u> 1055: 80.00			
Define automatic trans	fer of fees			
Only Members / Guest	s only members	🌮 <u>F</u> ee sorting		
Extra information ->	Entry-date Filter 0-0			
	Filter			
	Filter	la Print F8		
🔲 Gender	only 🔚			
Age group	only 🗧			
🔽 Membership	only 4			
🗖 Status	only			
🗌 Unused	only 📔	🔀 Quit		

For taster year 2, enter 1-1 for the entry date, i.e. the months 13-24.

Fee type X				
Abbreviation, Name, Status				
Abbreviation ani1 Account No.:				
Article group ANNF Annual fee 🔽 New Del.				
Name Taster year 2	<u> </u>			
Due date Empty = Present date	✓ <u>S</u> ave F11			
Status M - Monthly	X Delete F5			
Amount				
<u>V</u> .A.T.: 0.0 % Net: 100.00 <u>G</u> ross: 100.00				
Define automatic transfer of fees				
Only Members / Guests only members	🌮 Fee sorting			
Extra information -> Entry-date Filter 1-1				
Filter				
Filter	😂 Print F8			
🗖 Gender only				
Age group only				
Membership only 4				
🗆 Status only				
Unused only	🛛 🛛 🖸 🔟			

For taster year 3, you would then enter 2-2, which are the months 25-36.

If your members would then automatically switch to full member status, you can enter 3-99 as the entry date for the follow-up article. As you can see, you can also limit the number of years.

You can see how to automatically post the articles to your account here: Automatically assign annually increasing contributions

Payment methods

Beitrags-Typ ? X					
Suchkürzel, Name, Stat	-Suchkürzel, Name, Status				
K <u>ü</u> rzel b	Konto	-Nr. (Fibu):	◀ ▶		
Gruppe ZAHL	Zahlart	💌 Neu L	.ösch.	1	
N <u>a</u> me Banküt	perweisung		+ <u>N</u> eu		
<u>F</u> älligkeit	<u>F</u> älligkeit Leer = Buchungstag <u>S</u> tatus T - Text-Beitrag ▼			✓ <u>S</u> ichern F11	
<u>S</u> tatus T - Te				🔟 Löschen F5	
Betrag <u>M</u> wSt: 16.0 % Netto: 0.00 <u>B</u> rutto: 0.00					
Nur Mitglieder / Gäste	Nur Mitglieder / Gäste Mitglieder und Gäste 👻			× Zuordasa	
Gefülltes Infofeld		➡ Filter		2uorunen	
		▼ Filter			
		▼ Filter		Drucken F8	
Geschlecht	nur		\equiv		
Altersklasse	nur		\equiv		
Mitgliedschaft	nur		\equiv		
Status	nur				
Verschiedenes	nur			➡ <u>E</u> nde	

Please enter a **abbreviation**, select the **group** "Payment method", the **name** (depending on the payment method) and enter the **status** "Text contribution". Your payment method is now ready.

You normally need the following payment methods for a contribution account area:

- Bank transfer
- Cash payment
- Direct debit

Articles for cash accounts

Here you will find the special cash register articles:

- Greenfee article
- Proshop articles
- Catering articles