

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:

The screenshot shows a window titled "Beitrag wählen" with a search bar containing "aufn". Below the search bar is a table with columns: Gruppe, Bezeichnung, Datum, S, Netto, Brutto, and Sukz. The first row is highlighted in green and has a context menu open over it. The context menu is numbered 1-4 and contains the following items:

- 1. **Ok**
- 2. **Neu** F9
- 3. **Edit** F7
- 4. **Löschen** F5

Below the context menu are search and navigation options: **Suchen** and **Weiter** F3. At the bottom right is a red **Abbruch** button.

Gruppe	Bezeichnung	Datum	S	Netto	Brutto	Sukz
AUFN	Aufnahmegebühr Rate <N> von <T>	..	S	500.00	500.00	aufn
	Einzahlung	..	N	0.00	0.00	einz
JBEI	Jahresb. Student / Azubi	01.01.20	J	100.00	100.00	jstu
JBEI	Jahresbeitrag Aktive	..	N	250.00	250.00	jakt
JBEI	Jahresbeitrag Jugendliche	01.01.20	J	50.00	50.00	jjug
JBEI	Jahresbeitrag Junioren	01.01.20	J	70.00	70.00	jjun
JBEI	Jahresbeitrag Passiv	01.01.20	J	50.00	50.00	jpas
JBEI	Monatsbeitrag	..	N	0.00	0.00	MB
MIET	Elektro Caddie Box <?>	01.11.20	I	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	..	T	0.00	0.00	b
ZAHL	Barzahlung	..	T	0.00	0.00	bar
ZAHL	Euro-Card	..	T	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, Name, Status

1 Kürzel Konto-Nr. (Fibu):

Gruppe JBEI Jahresbeitrag ▼ Neu Lös.

Name Jahresbeitrag Aktive

Fälligkeit . . . Leer = Buchungstag

Status J - Jährlich ▼

Betrag

2 MwSt: 0.0 % Netto: 1250.00 Brutto: 1250.00

Automatische Beitrags-Zuordnung

3 Nur Mitglieder / Gäste Mitglieder und Gäste ▼

Gefülltes Infocfeld Filter

Gefülltes Infocfeld Filter

Gefülltes Infocfeld Filter

Geschlecht nur 1, 2 ☰

Altersklasse nur ☰

Mitgliedschaft nur 2, 4, 6 ☰

Status nur 1, 2 ☰

Verschiedenes nur ☰

◀ ☰ ▶

+ Neu

✓ Sichern F11

🗑 Löschen F5

🔍 Zuordnen

🖨 Drucken F8

➡ Ende

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 ? X

Suchkürzel, Name, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: Jahresbeitrag

Name:

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infocfeld: Filter:

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Verschiedenes nur

+ Neu

✓ Sichern F11

🗑️ Löschen F5

🔍 Zuordnen

🖨️ Drucken F8

➡️ 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
? X

Suchkürzel, Name, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: Jahresbeitrag:

Name:

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infocfeld: Filter:

Filter:

Filter:

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Verschiedenes nur

◀ ☰ ▶

F11

F5

F8

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 ? X

Suchkürzel, Name, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: Aufnahmegebührer

Name:

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infocfeld: Filter

Filter

Filter

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Verschiedenes nur

+ Neu

✓ Sichern F11

🗑️ Löschen F5

🔍 Zuordnen

🖨️ Drucken F8

➡️ Ende

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-Typ

Suchkürzel, Name, Status

Kürzel: boel Konto-Nr. (Fibu):

Name: Caddiebox Elektro <?>

Gruppe: CADD Caddieboxen

Status: I - Info-Beitrag, jährlich

Betrag

MwSt: 19,0 %

Netto: 126,05

Brutto: 150,00

Fälligkeit: 01.01.20

Info

Information:

Intern:

Automatische Beitrags-Zuordnung

Nur Mitglieder/Gäste: Mitglieder und Gäste

gefülltes Infocfeld: Boxen Filter EL

Geschlecht: nur

Altersklasse: nur

Mitgliedsstatus: nur

Beitragsstatus: nur

Unbenutzt: nur

Sidebar: Neu, Sichern (F11), Löschen (F5), Kopieren, Konto, Zuordnen, Drucken (F8), 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](#)

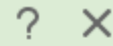
Article with components

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



Suchkürzel, Name, Status

Kürzel Konto-Nr. (Fibu):

Gruppe Jahresbeitrg

Fälligkeit Leer = Buchungstag

Status

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste

Gefülltes Infocfeld Filter

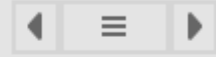
Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Beitragsstatus nur



+ Neu

✓ Sichern F11

🗑️ Löschen F5

🔍 Zuordnen

🖨️ Drucken F8

🏠 Ende

Beitrags-Typ
?
×

Suchkürzel, Name, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: VERB Verbandbeitrag Neu Lös.

Name: DGV Beitrag ## ##

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infofeld: Filter

Filter

Filter

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Beitragsstatus nur

←
☰
→

+ Neu

✓ Sichern F11

🗑 Löschen F5

🔍 Zuordnen

🖨 Drucken F8

🏠 Ende

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

Umsatzkonto - GMBH

Bitschene, Jochen (bijo)

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	

zusa | JBEI_Jahresbeitrag <+> | 01.01.21 | | J | 840,34 | 1000,00

0,00	0,00
0,00	0,00
848,74	1010,00

Beitr.Wahl F2
Beitr.-Typ F7
Ändern
Storno F5
Zuordnen
Bezahlen
Drucken F8
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
?
×

Suchkürzel, Name, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: Neu Lösch.

Name:

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infocfeld: Filter:

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Beitragsstatus nur

◀ ☰ ▶

+ Neu

✓ Sichern F11

🗑 Löschen F5

✳ Zuordnen

🖨 Drucken F8

➡ Ende

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

Umsatzkonto - CLUB

Bitschene, Jochen (bijo)

Information	Datum	Zeit	S	Netto	Brutto	OK
mona Monatsbeitrag	01.01.21		M	83,19	99,00	
mona Monatsbeitrag	01.02.21		M	83,19	99,00	
mona Monatsbeitrag	01.03.21		M	83,19	99,00	
mona Monatsbeitrag	01.04.21		M	83,19	99,00	
mona Monatsbeitrag	01.05.21		M	83,19	99,00	
mona Monatsbeitrag	01.06.21		M	83,19	99,00	
mona Monatsbeitrag	01.07.21		M	83,19	99,00	
mona Monatsbeitrag	01.08.21		M	83,19	99,00	
mona Monatsbeitrag	01.09.21		M	83,19	99,00	
mona Monatsbeitrag	01.10.21		M	83,19	99,00	
mona Monatsbeitrag	01.11.21		M	83,19	99,00	
mona Monatsbeitrag	01.12.21		M	83,19	99,00	

mona MONA_Monatsbeitrag <+A>++ 01.01.21 M 83,19 99,00

1.128,48	1.320,00
1.320,00	0,00
1.852,52	2.138,00

Beitr.Wahl F2
Beitr.-Typ F7
Ändern
Storno F5
Zuordnen
Bezahlen
Drucken F8
Ende

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 [Close]

Abbreviation, Name, Status

Abbreviation: Account No.:

Article group: Annual fee

Name:

Due date: Empty = Present date

Status:

Amount

V.A.T.: % Net: Gross:

Define automatic transfer of fees

Only Members / Guests:

Extra information ->

<input type="text" value="Entry-date"/>	Filter	<input type="text" value="0-0"/>
<input type="text"/>	Filter	<input type="text"/>
<input type="text"/>	Filter	<input type="text"/>

Gender only
 Age group only
 Membership only
 Status only
 Unused only

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

Fee type [X]

Abbreviation, Name, Status

Abbreviation: Account No.:

Article group:

Name:

Due date: Empty = Present date

Status:

Amount

V.A.T.: % Net: Gross:

Define automatic transfer of fees

Only Members / Guests:

Extra information ->

<input type="text" value="Entry-date"/>	<input type="text" value="Filter"/>	<input type="text" value="1-1"/>
<input type="text"/>	<input type="text" value="Filter"/>	<input type="text"/>
<input type="text"/>	<input type="text" value="Filter"/>	<input type="text"/>

Gender only
 Age group only
 Membership only
 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, Status

Kürzel: Konto-Nr. (Fibu):

Gruppe: ZAHL Zahlart Neu Lös.

Name:

Fälligkeit: Leer = Buchungstag

Status:

Betrag

MwSt: % Netto: Brutto:

Automatische Beitrags-Zuordnung

Nur Mitglieder / Gäste:

Gefülltes Infocfeld: Filter

Filter

Filter

Geschlecht nur

Altersklasse nur

Mitgliedschaft nur

Status nur

Verschiedenes nur

+ Neu

✓ Sichern F11

🗑 Löschen F5

🔍 Zuordnen

🖨 Drucken F8

➡ Ende

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](#)