Additional Calculations

Overview

You can configure individual surcharges and discounts for Debtors (Customers) and Vendors (Authors) in **Finance > Tax Rates and Calculations > Additional Calculations.** These surcharges and discounts can be defined either as a percentage or as a fixed amount in the selected currency. You can specify whether and how these adjustments shall impact the final invoice amount.

Common examples of additional calculations include solidarity tax and KSV (Artist's social security contribution).

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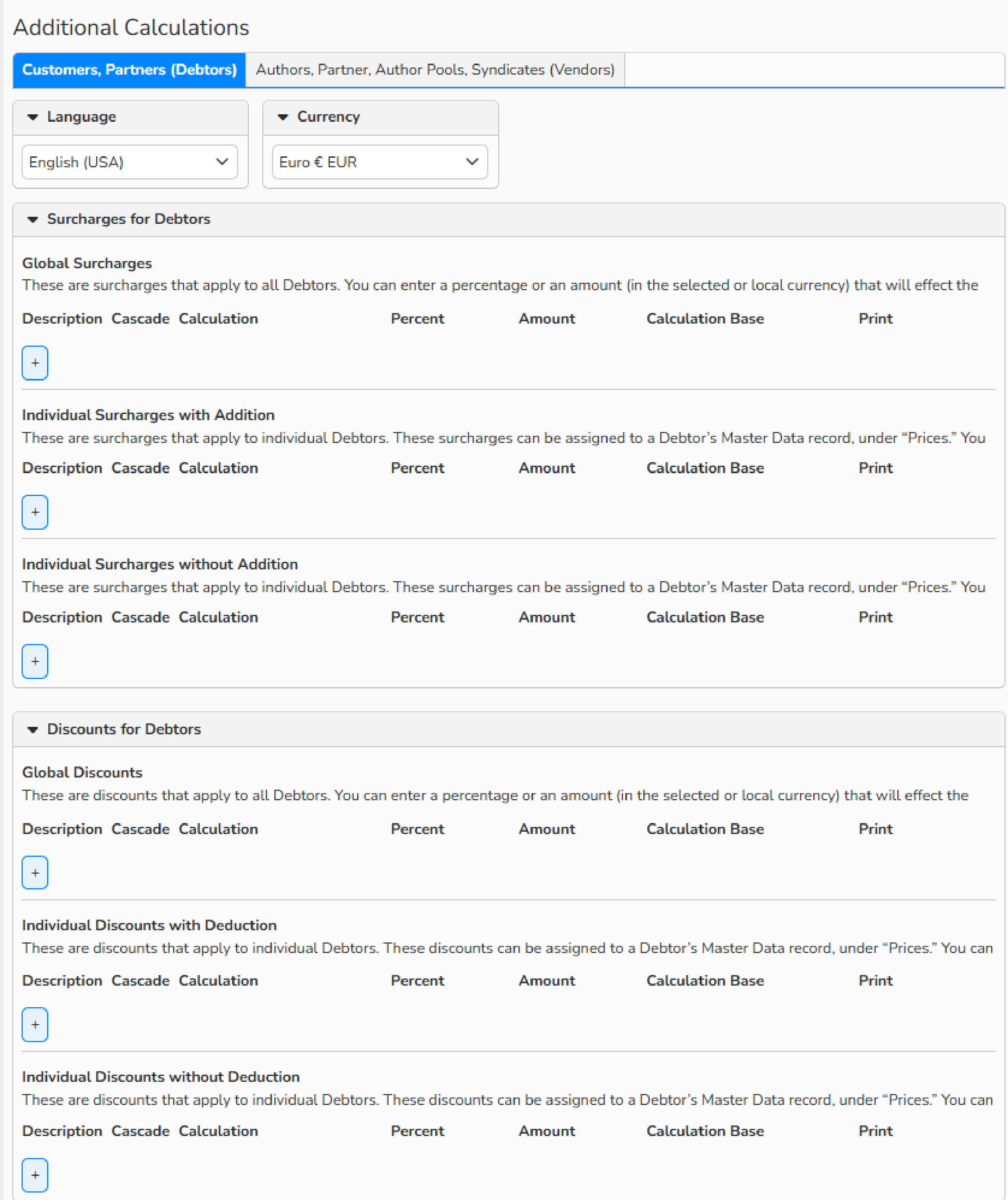

Additional Calculations setup window

Types of additional calculations

You can set up and apply the following additional calculation types:

- **Global Surcharges/Discounts**:
  - Apply to **all** debtors and vendors.
  - Can be set as a percentage or amount.
  - Change the final invoice amount.
- **Individual Surcharges/Discounts**:
  - Apply **individually** to specific debtors or vendors.
  - Can be set as a percentage or amount
  - Change the final invoice amount.
- **Individual Surcharges/ Discounts without Addition/Deduction**:
  - Apply **individually** to specific debtors or vendors.
  - Can be set as a percentage or amount.
  - **Do not** change the final invoice amount.

Explanation of elements

The following fields and symbols are available for creating surcharges and discounts:

Description	Defines the name of the surcharge or discount.
+	Opens the line for surcharges or discounts; inserts another line.
-	Removes the line and the surcharge or discount it contains.
Cascade	Enables “nesting” of surcharges and discounts.
↓	Opens a sublevel for another value belonging to the surcharge or discount.
Calculation	
◉	Specifies whether the calculation is performed as a percentage or as an amount.
Percent	Definiert den Prozentsatz, vorausgesetzt, dass Prozent als Berechnungstyp ausgewählt wurde.
Amount	Defines the amount, provided that Amount is selected as the calculation type.
Calculation Base	

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	Specifies whether the calculation basis for the surcharge or discount is the net or gross value.
Print	
	Specifies whether the surcharge or discount is shown on the respective document.

Apply additional calculations

Apply additional calculations as follows:

1. Navigate to **Finance > Tax Rates and Calculations > Additional Calculations.**
   - If the additional calculations refer to revenues (Invoices), select the **Customers, Partners (Debtors)** tab.
   - If the Additional Calculations refer to expenses (Sales Reports), select the **Authors, Partners, Author Pools, Syndicates (Vendors)** tab.
2. Specify **Language** and **Currency** *(Optional for multilingual / multi-currency accounting)*:
   - If your accounting is multilingual (configured in **Administration > Language Settings > Languages**), select each language from the **Language** dropdown and configure the additional calculation for it. Click **Save** to confirm each selection.
   - If your accounting is managed in multiple currencies (configured in **Administration > Regional Settings > Currencies**), select each currency from the **Currency** dropdown.
3. In the corresponding **Surcharges/Discounts for Debtors/Vendors** panel, click the plus icon to open an input line for your entries. Configure the following:
   - **Description**: enter a name for the surcharge/discount.
     - Use the [+] icon to add/open a row for the surcharges or discounts.
     - Use the **Cascade** arrow icon to open a sublevel for another value associated with the surcharge or discount. See Cascade calculation example below.
   - **Calculation**: select the calculation type: **Percent** or **Amount**. Enter the respective amount in the **Percent** / **Amount** field.
   - **Calculation Base**: specify whether **Net** or **Gross** amounts should serve as the calculation basis and select the general ledger account for automatic posting. If needed, you can remove the account assignment with the Remove button.
   - **Print**: select the option to display the surcharge or discount on the invoice. The system will process the invoice even if the option is not selected.

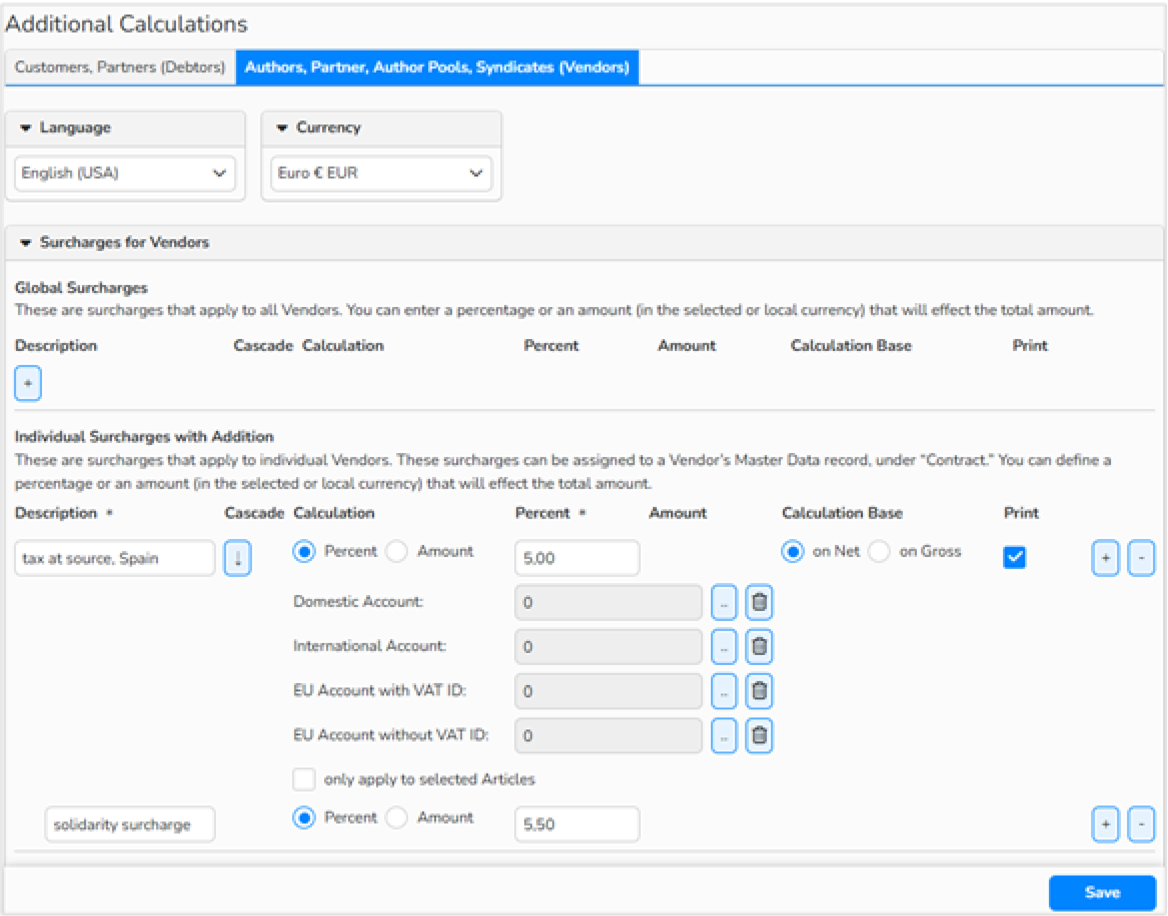
4. Click **Save**.

> **Tip**
>
> **Individual Surcharges – Flat-Rate Expense Allowance**
>
> Do you pay photographers (Authors) fixed expense allowances such as per diems or travel flat rates? You can configure these as fixed surcharges under **Finance > Tax Rates and Calculations > Additional Calculations**.
>
> The surcharge is applied to all authors assigned to it in their master data. If the amount changes, update it once under **Additional Calculations**. The new value is automatically applied to all linked master data records.

Example of cascade calculation

In this scenario, a 5% Spanish withholding tax is first applied to the net amount.

Based on the resulting value, an additional 5.5% solidarity surcharge is then deducted:



Additional Calculations setup window > Vendors tab: Cascade calculation

> **Tip**
>
> **Configure individual deductions at country level**
>
> Since every country has its own double-taxation agreement with Germany, it is recommended to define an individual deduction for each country.
>
> This way, if a rate changes (for example, the deduction percentage for Spain), you only need to update it once in: **Finance > Tax Rates and Calculations > Additional Calculations**.
>
> The update will automatically apply to all media suppliers, where the deduction is defined. All the rest will remain unaffected.

Use additional calculations in Master Data

Once you have defined surcharges and discounts in the **Finance** module, they become available within the master data for Sales (customers) and Purchasing (authors).

The system automatically applies the defined values whenever a billing process is triggered for the respective master data record.

1. Navigate to **Sales > Customers /Partners** or **Purchasing > Authors/ Partners.**
2. Double-click a record to open it.
3. To view Additional Calculations:
    - For **Sales** records, open the **Prices** tab; for **Purchasing** records, open the **Contract** tab.
    - Select the **Additional Calculations** subtab.
4. Click the plus icon to open the available surcharges and discounts.
5. Select an option from the **Description** dropdown menu.
6. Click **Save**

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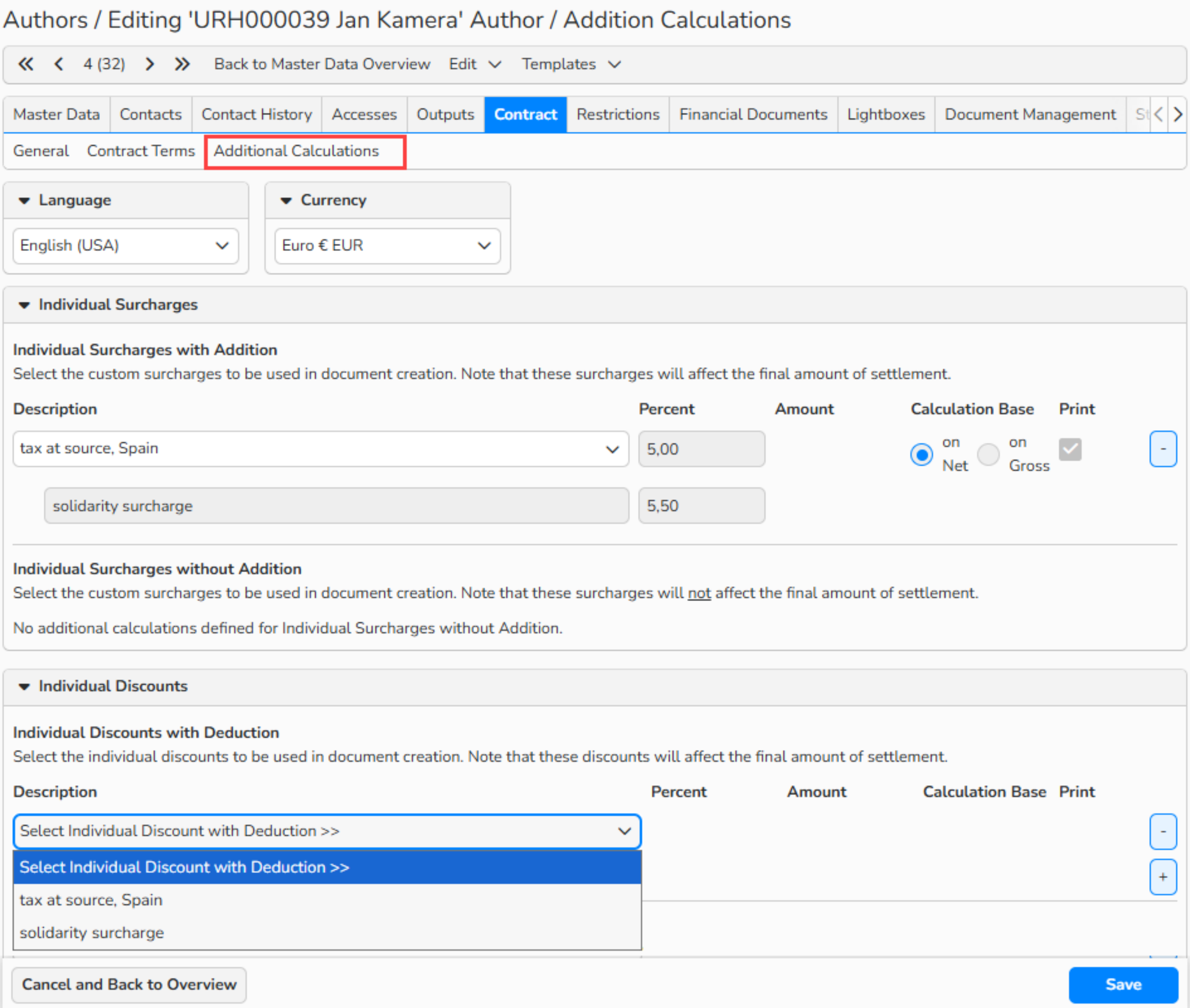

Purchasing Author record: Contract tab > Additional Calculation submenu: Selection of surcharges and discounts

Tip

Use master data templates

If you often use the same settings for additional calculations in your customers master data, you can simplify your workflow by creating templates in **Finance > Templates > Financial Master Data**.

When you create a new master data record (Customer, Partner, Author), the system automatically pre-fills relevant fields with the default values from the selected template.