



# Properties and Property details

## Planon Software Suite

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# About this Document

## Intended Audience

This document is intended for *Planon Software Suite* users.

## Contacting us

If you have any comments or questions regarding this document, please send them to: [support@planonsoftware.com](mailto:support@planonsoftware.com).

## Document Conventions

### **Bold**

Names of menus, options, tabs, fields and buttons are displayed in bold type.

### *Italic text*

Application names are displayed in italics.

### CAPITALS

Names of keys are displayed in upper case.

## Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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# About Properties and Property details

Properties are the first selection level in most of the TSIs. The basic details of the properties can be added and modified in all the TSIs. The main purpose of the Properties and Property details TSI is to enter additional details related to a property like for example, CO2 emission, Energy cost, Area surfaced etc. You can also enter parcel details and link properties to the parcels.



The properties displayed depend on the selected property set.



For details on the basic principles of using Planon ProCenter , refer to *Fundamentals*.

# Properties and Property details – Concepts

This section describes the key concepts in Properties and Property details :

- [Property](#)
- [Property tree](#)
- [Parcel](#)
- [Communication logs](#)

## Property

Properties are the cornerstone of Planon ProCenter . The different types of properties available are:

- Terrain
- Building
- Infrastructure
- Location
- Production facility
- Residential
- Shop
- Warehouse
- Wing
- Nature
- Use

You can add sub-properties to a property. The types of sub-properties are similar to the property types available.

Properties have a workflow and statuses. The default status is **In preparation**. Other statuses are **Active** and **Terminated**. Using this workflow is optional. It will give you the opportunity to prepare a property, including its floors and spaces. When all data is entered, you can set the property to **Active** and start using it.

The transition to the **Active** status is only allowed when:

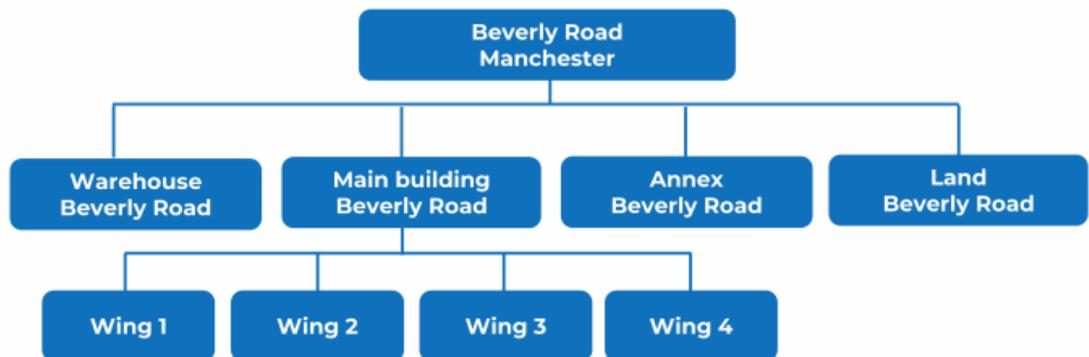
- The **Start date** field has a value.
- The **In Portfolio** field is set to **Yes**.

## Property tree

A property is a hierarchical element. This means it can be divided into sub-properties. The maximum number of levels in the hierarchical structure is three.

Example

A building complex consists of four properties: a main building, an annex, a warehouse and ground. The main building is subdivided into several wings.



## Parcel

A parcel is a plot of land that represents a legal estate. A parcel may or may not belong to a property.

In Planon ProCenter, the parcel element is used to register land in an area. A parcel can be empty or can have a property built on it. Registering parcels will provide an outline of the parcels in an area.

You can also link property(-ies) and parcel(s) enabling you to have an overview of properties on the parcels in a particular area.

For more information on linking properties and parcels, see [Linking properties to a parcel](#).

## Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter. These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.

For communication logs that were automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see [Communication log fields](#).

 You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

## Four eyes principle

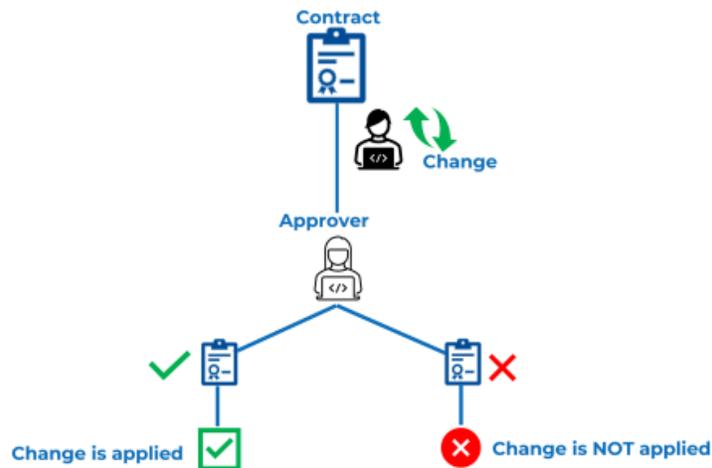
The *four eyes principle* is a requirement that a certain business transaction must be reviewed, double-checked and approved by a second person. With the **Approval** feature in Planon, important changes always have to be approved by a second person before the changes are actually implemented. For more information, see [Using approvals](#).

In Planon, the four eyes principle can be used for the following business objects:

- Contracts
- Contract lines
- Special lease amounts
- Contract options
- Properties and property details
- Free business objects 46, 47 and 48 (Open Module)

 By default, Planon supports an approval process with one approver. If your organization wants to use more approvers, you have to configure this (TMS).

Planon also supports the approval process for changes imported through data import tools such as Enterprise Talk and SDI. The imported changes trigger approvals when they meet the approval conditions.



## Observations on Properties

Observations made on buildings and/or corporate assets can be part of an official assessment in the **Planon ProCenter > Assessments and observations** TSI, but they can also be registered independently. In addition, observations can also be added in TSIs that are related to the **Assessments and observations** TSI, such as the **Properties and Property details** and the **Assets** TSIs.

In **Planon ProCenter**, observations relate to things that have corporate value such as:

- properties (buildings or wings / annexes),
- spaces (offices, meeting rooms, technical spaces etc.)
- assets (such as office furniture and other inventory items, mechanical and electrical installations and building elements like tiles or frames).

The **Observations** selection step in a related TSI, like **Properties and Property details**, behaves 'smartly'. It displays all observations that are directly related to the selected property, but it also displays the observations on items that are indirectly related, such as the spaces and assets in the selected property.

**i** In the **Assessments and observations** TSI, on the Results > Observations selection level, you can register your observations that are part of an assessment, as well as independent observations. Go to [Assessments](#) for more information on working with this TSI.

# Working with Properties and Property details

This section identifies the processes and tasks that can be performed in the Properties and Property details TSI.

See the links below for more information:

- [Adding a property](#)
- [Archiving properties](#)
- [Changing the parent level of a property](#)
- [Adding a parcel](#)
- [Linking properties to a parcel](#)

## Adding a property

If you have appropriate authorization, you can add a main or sub property.

### Procedure

1. Go to Properties.
2. On the action menu, click Add and select the required property type.  
You can choose from:
  - Terrain
  - Building
  - Non-property related data
  - Site
3. In the data section, complete the relevant fields. For a description of these fields, refer to Property data.
4. Click Save.

You have added a new property.

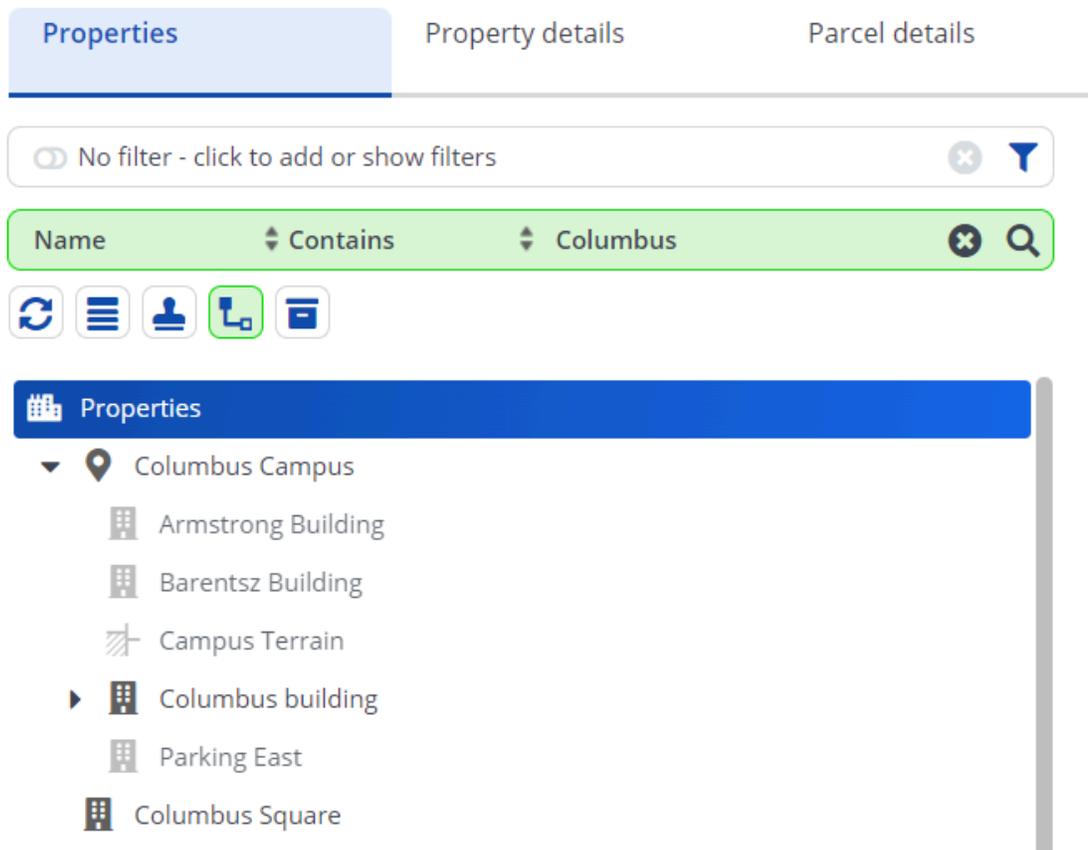


A property can only be deleted if it does not contain sub-properties.

## Showing related properties

At the **Properties** selection level, the **Show related properties**  toggle button allows you to show all the related properties of a main property or subproperty. If properties are filtered, the related subproperties or main properties may not be displayed. If you want to view the properties in their 'family' context, irrespective of the selection you have made, click the **Show related properties** toggle button to display the related main properties or subproperties. If the button is activated, properties which are a member of the selected properties' 'family' are also displayed in the elements list, in a lighter shade, even though these properties do not belong to your current selection.

 The **Show related properties** button is also available on the **Properties** selection level of the **Contracts** and **Rentable units** TSIs.



 This toggle button - also referred to as 'step action' - is available to all users by default. However, you may want to hide it from some users when it is not relevant to them. For more information, see [Step actions](#).

## Adding property details

After adding a type of property, you can add additional details to the main or sub property.

## Procedure

1. Go to Property details.
2. On the action panel, click Add.
3. In the data panel, complete the relevant fields. For a description of these fields, see Property details data.
4. Click Save.

You have added property details.

If required, you can also add [property valuation details](#) and [strategic property details](#).

## Adding strategic property details

### Procedure

1. Go to Strategic property details.
2. On the action panel, click Add.
3. In the data panel, complete the relevant fields. For a description of these fields, see Strategic property details - fields.
4. Click Save.

You have added strategic property details.

## Adding property valuation details

### Procedure

1. Go to Property valuation details.
2. On the action panel, click Add.
3. In the data panel, complete the relevant fields. For a description of these fields, see Property valuation details - fields.
4. Click Save.

You have added property valuation details.

## Keeping track of changes made to property details

You can keep track of changes made to property details fields by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of the property details you want to keep a history on. Your application manager can enable an automatic **History** option for individual fields belonging to property details in Field definer . Once this option is enabled, any changes to the field's

value are saved automatically. These changes can then be viewed on the next selection level.

 For details on changing field attributes, see Field definer .

With the appropriate authorization, you can also manually add a history of changes to the selected property details, via the action panel. Any comments you want to make on changed data for the selected property details can be specified in the **Comment** field and subsequently saved.

## Archiving properties

In Planon ProCenter , you can archive properties in all the TSIs where the properties element is available.

### Procedure

1. Go to Properties.
2. Select the property that you want to archive.
3. On the action menu, click Transfer to archive.

To archive multiple properties at once, select Action on selection.

4. Click Refresh list. The selected property is moved into the archive.
5. You have now archived a property.

Archived properties can be viewed by clicking on the **Show archived items** button. The data can only be viewed, it cannot be modified. If you want to modify the data of an archived property, you have to retrieve the property from the archive.

 When archiving a property, the related property details are also archived.

## Moving one property to another property

In Planon ProCenter you can move one property to another property if the levels of hierarchical structure of both the properties, in total, do not exceed the maximum number of levels in the hierarchical structure of the property tree. The maximum number of levels in the hierarchical structure is three.

### Procedure

1. Select the property in the relevant TSI.
2. In the General data section, select the Parent level field
3. Click the reference button and select a new property from the property list.

4. Click OK.



Be aware that making changes to the property hierarchy can impact other TSIs such as **Budget Management, Contract Management** and so on.

## Adding a parcel

You can register parcel details with the following procedure:

### Procedure

1. Go to Property details > Parcels.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Parcel data.
4. Click Save.

You have now added a parcel.

## Linking properties to a parcel

You can link properties to parcels to identify properties that belong to parcels. You can have several parcels linked to a property or several properties linked to a parcel.

### Procedure

1. Go to Property details > Parcels.
2. Select the parcel to which you want to link properties.
3. Click Link Properties on the action menu. The Link Properties dialog box appears.
4. Select the properties from the Available list and move them to the In use list.
5. Click OK.

You have now linked property(s) to a parcel.

Alternatively;

6. Go to Parcel details, enter the Start date, Parcel & Property details and click Save to link a property and a parcel together.

The following points should be considered when linking a parcel and a property.

- The linked properties of a parcel should be defined within the time scope of that parcel.
- If a parcel and a property are linked, the property will inherit the start/end date of the parcel.

- When the time scope of the parcel is changed, all linked properties are checked if they still fit in the time span of the parcel.
- When the timeline of a property parcel link is changed, the linked parcel is checked if it still overlaps the time span of the link.

# Reporting in Properties and Property details

Planon ProCenter includes a tool that is used to create, edit and print reports: **Reports**. With the appropriate authorization, you can access **Reports** from within all action panels in Properties and Property details. If you click **Report** on the action panel, the **Reporting** dialog box appears.

- The **User reports** tab provides access to functionality to create your own report definitions. For details on creating user report definitions, see [User Report Definitions](#).
- The **System reports** tab in the **Reporting** dialog box provides access to **Property passport** system report. This report is predefined by Planon.

## Generating the Property passport system report

### Procedure

1. Go to the Properties selection level of the Properties and Property details TSI, or any TSI that has the Properties selection level.
2. Select the property/-ies for which you want to generate the report.
3. On the action panel, click Report.

**The Reporting window opens.**

4. Click the System reports tab.
5. Select the Property passport report.
6. Click **Edit report settings** and make the required settings in the **Property passport settings** dialog box.

By default, the fields shown in the report are fixed. It is also possible to configure which fields are displayed in the report. You can add or remove property details fields according to your preferences and needs:

- a. Set the **Report configurable?** report setting to **Yes**.

- b. **On the links panel, click Link property details fields.**

The **Link property details fields** dialog box appears. This dialog box allows you to select the fields you want to make available in the report. Select the required fields and

click **OK**. By clicking **OK**, you will return to the **Property passport settings** dialog box.

c. Specify a **Subheading for configured fields** if necessary.

7. Select relevant output options for your report:

- **Preview & print:** enables you to preview and print a version of your report.
- **Save as:** enables you to select an export format. You can choose between the PDF, HTML, CSV formats and three different XLS formats.

For more information about reporting in general, see [Report Manager](#).

## Data in the Property passport system report

The **Property passport** system report includes a section with various property-specific details.

Property		Portfolio dates	
Property code	14	Age of Property	2004
Property name	Columbus Square	Date of acquisition	Apr 1, 2004
Address	Columbus Square	Date of disposal	n/a
Building number	8		
ZIP code	N6 5TR		
City	London		
District	London		
Country	United Kingdom		
Status	In management		
Type	Building		
Parent level	n/a		

Portfolio details on reference date			
<b>Portfolio data</b>		<b>Current capacity - Space</b>	
Portfolio strategy	Hold	Gross floor area	n/a
Tenure	Leased	Net lettable area	n/a
Business strategic value	High	Contractual GLA Leased	n/a
Marketability	Marketable	Contractual GLA Let	n/a
		Plot surface area	n/a
<b>NEN2767</b>		<b>Current capacity in people</b>	
Actual condition score (NEN2767)	n/a	Maximum occupancy	n/a
Target condition score (NEN2767)	n/a	Actual Number of People	n/a
<b>Facility management</b>			

In addition, there is a section that provides an overview of the financial commitments associated with the property.

## Financial commitments

### CommercialAssessment

		<i>Payment Y/N</i>	<i>Start date</i>	<i>Next end date offering party</i>	<i>Next end date accepting party</i>	<i>Offering party</i>	<i>Accepting party</i>
14.CA	Columbus Square	N	Jan 1, 2000			n/a	n/a
	<b>Code</b>			<b>Date effective</b>	<b>End date</b>	<b>Amount (€)</b>	<b>Amount per</b>
	2004			Jan 1, 2004	Dec 31, 2004	11,000,000	Year
	2005			Jan 1, 2005	Dec 31, 2005	11,500,000	Year
	2006			Jan 1, 2006	Dec 31, 2006	11,845,000	Year
	2007			Jan 1, 2007	Dec 31, 2007	12,200,000	Year
	2008			Jan 1, 2008	Dec 31, 2008	12,500,000	Year
	2009			Jan 1, 2009	Dec 31, 2009	11,875,000	Year
	2010			Jan 1, 2010	Dec 31, 2010	11,200,000	Year
	2011			Jan 1, 2011	Dec 31, 2011	10,640,000	Year
	2012			Jan 1, 2012	Dec 31, 2012	11,000,000	Year
	2013			Jan 1, 2013	Dec 31, 2013	10,120,000	Year
	2014			Jan 1, 2014	Dec 31, 2014	10,150,000	Year
	2015			Jan 1, 2015	Dec 31, 2015	10,657,500	Year
	2016			Jan 1, 2016	Dec 31, 2016	10,857,500	Year
	2017			Jan 1, 2017	Dec 31, 2017	10,930,000	Year
	2018			Jan 1, 2018	Dec 31, 2018	11,060,000	Year
	2019			Jan 1, 2019	Dec 31, 2019	11,192,720	Year

# Properties and Property details - Field descriptions

## Property data

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Field	Description
General fields	
Address data	Enter the address of the property/building. Specify all the address related fields like, Building number, Postal code, City, District and Country for the address to be complete.
Calendar	In this field, which is not visible by default, you can link a property to a company calendar, by selecting a calendar from the pick list. Consequently, all date-time fields that are related to the property will pick up the working days and working hours of this calendar.
Code	Enter a code for the property.
Comment	A comment field in which you can type comments of any length.
Display type	Select the type of property that you are adding. For example buildings, complex, land etc. Based on the type of property selected in this field, the data registered will vary.
Image	Select a photograph or a drawing of the property. You can upload an image or provide reference by selecting the file.
In portfolio	This field serves to differentiate properties that are integral to all processes (setting = <b>Yes</b> ) from those properties that certain back-office processes should disregard (setting = <b>No</b> ).
Linked parcels	If any parcels are linked to the selected property, they will be displayed here.
Name	Enter a relevant name for the property.
Parent level	If the property is a sub of another property, select a property that the sub belongs to.

Field	Description
Property code	It depends on your Planon ProCenter settings whether a property code is generated or needs to be typed manually.
Property file	<p>A link field to link a file that has not been created in Planon ProCenter such as a dossier with property data. From within Planon ProCenter , the linked file may be opened in the application in which it was created.</p> <p>In Web Client, when WebDAV is used, the WebDAV location will not be displayed, only the folder excluding the folder specified in file location and file name will be displayed.</p>
Time zone	Select a time zone to which the property belongs.
Miscellaneous fields	
Account manager	There is a linked pick list from the Addresses TSI available for this field.
Cost center	Select a cost center for the property from the list.
Contractor	The contractor responsible for the construction. You can choose an option from a pick list, containing the addresses from the Addresses TSI.
Number of floors	The number of floors in a building. If you have purchased the Spaces & Workspaces TSI, it is possible to subdivide a property into floors.
Gross area	The gross area including outer walls.
Net area	The net area excluding outer walls.
Functional area	The area that is available for the actual use of the property.
Total volume	The total volume of a property.
Quality level	If you use the Objective-based maintenance solution, you can select a relevant quality level for the selected property, in this field.
	<div style="border: 1px solid black; padding: 5px;">  The complete Objective-based maintenance solution is scheduled to be released mid-2023. </div>
Quantity	Specify a quantity for properties of the type <b>Terrain</b> or <b>Site</b> to register for example, the number of square meters of a lawn or the number of parking spaces.

<b>Field</b>	<b>Description</b>
Unit of measurement	Select a relevant unit of measurement that applies to the <b>Quantity</b> selected.
Ownership fields	
Beneficial owner	The beneficial owner uses a property. The beneficial owner and the legal owner are usually the same. You can choose an option from a pick list including the addresses of the Addresses TSI.
Legal owner	The property's legal owner is the owner according to the property register. Usually, the legal owner and the beneficial owner are identical. You can choose an option from a pick list including the addresses of the Addresses > TSI.
Acquisition contract	A link field to link to a file containing a property's acquisition contract.
Sales contract	A link field to link a file containing a property's sales contract.
Property register fields	
Municipality	The name of the municipality in which the property is located.
Section	The section to which the property belongs, according to the property register.
Cadastral numbers	The section numbers that correspond to a property.
Cadastral area	The cadastral surface area of the section.
Built on area	The number of built-on square meters/feet on the cadastral numbers.
Vacant area	The number of vacant square meters/feet on the cadastral numbers.
Ground rent	The amount of ground rent to be paid.
Zoning plan	A concise description of the zoning plan.
Easement	An indication of whether it is mandatory to grant right of way within the grounds.

Field	Description
Financial fields	
Book value	The property value, as registered in the balance sheet.
Annual depreciation	The property's annual depreciation. (Note: this data is not used for calculations. At the end of the year, Planon ProCenter makes modifications based on this field instead of the <b>Book value</b> field).
Tax value	The property's tax value as registered by the tax authorities. In other words, the amount on which the property tax is based.
Reconstruction value	The costs of rebuilding the property. The field is used when the building insurance premium is assessed.
Buildings value	The value of the building (excluding the land).
Land value	The value of the land (excluding the buildings).
Clearance costs	The costs of demolishing the property and clearing up and transporting the debris.
Valuation criteria	Any comments on the valuation data.
Valuation consultant	The consultant who created the valuation report. For these fields a pick list is available, containing the addresses of the Addresses TSI.
Report date	The date the valuation report was issued.
Valuation report	A link field to link a file containing a property's valuation report. To view the valuation report, click the <b>Viewer</b> button in the field.
Geo tags	
Longitude	Enter the longitude coordinates of the property's geographical location.
Latitude	Enter the latitude coordinates of the property's geographical location.
GPS coordinates	Enter the property's GPS coordinates, comma separated without spaces. [ <i>latitude coordinates, longitude coordinates</i> ]. This data is used, for example, by the Planon AppSuite app to show a job location on mobile devices of field engineers. This field can also be used in <a href="#">web services</a> .

Field	Description
Audit info	
Insertion date-time	Displays the date and time the property was added in Planon.

## Property details data

Field	Description
General fields	
Start date	Enter the start date for the property.
End date	Enter the end date for the property.
Code	Enter a code for the property.
Property	Select a property from the list. If you drill down from a property, this field will be filled in automatically.
Approval definition	The approval definition linked to the property.
Current portfolio data	
Portfolio strategy	Select the strategical status of the property. You can choose from the following options: <ul style="list-style-type: none"> <li>• <b>Hold</b></li> <li>• <b>Dispose</b></li> <li>• <b>Refurbish</b></li> <li>• <b>Redevelop</b></li> </ul>
Tenure	Select the conditions under which land or buildings are held or occupied. You can choose from the following options: <ul style="list-style-type: none"> <li>• <b>Sole ownership</b></li> <li>• <b>Joint ownership</b></li> <li>• <b>Leased</b></li> </ul>
Business strategic value	Select the value that the property is likely to generate. You can choose from the following options:

Field	Description
	<ul style="list-style-type: none"> <li>• <b>High</b></li> <li>• <b>Low</b></li> <li>• <b>Medium</b></li> </ul>
Marketability	Select whether the property is <b>Marketable</b> or <b>Non-marketable</b> .
Footprint areas	
Property footprint area	Enter the ratio of a building's total floor area to the size of the piece of land upon which it is built.
Area surfaced	Enter the part of property that is properly surfaced.
Area unsurfaced	Enter the part of property that does not have proper surface or durable upper layer.
Water expanse	Enter the extent of water on the property.
Rentable area	Enter the area of the property which may be leased or rented to tenants.
Energy index	The energy index expresses the energy efficiency of a building in a number. Enter a numerical value in this field.
Energy index expiration date	Enter the date on which the energy index expires. On this date, the energy index must be redetermined.
Energy label	Select a relevant energy label from the <b>Energy label</b> dialog box that is available in this field. Energy labels are maintained and added in Supporting data . For more information, see <a href="#">Energy labels</a> .
Energy label expiration date	Enter the date on which the energy label expires. On this date, the energy label must be redetermined.
EP-2	The EP-2 indicates the primary fossil energy consumption. Enter the EP-2 as a numerical value in this field.
EP-2 expiration date	Enter the date on which the EP-2 expires. On this date, the EP-2 must be redetermined.

## Strategic property details - fields

Field	Description
Property	Select a property from the list. If you drill down from a property, this field will be filled in automatically.
Start date	Enter the start date for the property.
End date	Enter the end date for the property.
Approval definition	The approval definition linked to the property..
Portfolio strategy	Select the strategical status of the property. You can choose from the following options: <ul style="list-style-type: none"> <li>• <b>Hold</b></li> <li>• <b>Dispose</b></li> <li>• <b>Refurbish</b></li> <li>• <b>Redevelop</b></li> </ul>
Tenure	Select the conditions under which land or buildings are held or occupied. You can choose from the following options: <ul style="list-style-type: none"> <li>• <b>Sole ownership</b></li> <li>• <b>Joint ownership</b></li> <li>• <b>Leased</b></li> </ul>
Business strategic value	Select the value that the property is likely to generate. You can choose from the following options: <ul style="list-style-type: none"> <li>• <b>High</b></li> <li>• <b>Low</b></li> <li>• <b>Medium</b></li> </ul>
Marketability	Select weather the property is <b>Marketable</b> or <b>Non-marketable</b> .
Next review date	Enter the date for the next review.

## Property valuation details - fields

Field	Description
Property	Select a property from the list. If you drill down from a property, this field will be filled in automatically.

Field	Description
Start date	Enter the start date for the property.
End date	Enter the end date for the property.
Approval definition	The approval definition linked to the property.
Valuation date	Enter the date on which the valuation was performed.
Valuation firm	Select the firm who performed the valuation.
Valuer	Select the contact person for the valuation.
Market value	Enter the property's market value.
Annual ERV (estimated rental value)	Enter the property's annual estimated rental value.
Book value date	Enter the date on which the property's book value was determined.
Book value	Enter the property's book value.

## Parcel data

Field	Description
Code	Enter a unique code for the parcel.
Country	Select a country where the parcel is located.
Date of abstract	Select a date of last update for the legal documents (that records the activities) of the parcel.
District	Enter a district for the parcel location.
End date	The end date is updated when there is a change in the current dimensions of the parcel.
GPS coordinates	Enter the parcel's GPS coordinates, comma separated without spaces. [ <b><i>latitude coordinates,longitude coordinates</i></b> ]. This data is used, for example, by the Planon AppSuite app to show a job location on mobile devices of field engineers. This field can also be used in <a href="#">web services</a> .

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<b>Field</b>	<b>Description</b>
Measured area	Enter the actual measured area of the parcel.
Municipality	Enter a municipality under which the parcel is located.
Name	Enter a descriptive name for the parcel.
Parcel number	Enter a parcel number.
Image	If available, select a photograph or a drawing of the parcel.
Registered area	Enter the registered area of the parcel.
Section	Enter the section (assigned by the land registry) that the parcel is part of.
Start date	Specify a start date for the parcel.
Subsection	Enter the subsection (assigned by the land registry) that the parcel is part of.
Tenure	Select a condition under which parcel or property are occupied. For example, Private, Open access, Communal, State etc.

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