Space Chargeback

Planon Software Suite

Version: L127

Planon
Building Connections

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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.

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 Space chargeback

Space chargeback is a method of allocating real estate costs to the departments or occupants that use specific spaces within a property.

The purpose of **Space chargeback** is to create transparency in space-related spending and ensure that costs are assigned fairly based on actual **Space usage**. Instead of applying a fixed cost per department, space chargeback uses a defined calculation method and selected area type to determine the actual cost of each space over a defined period.

In Planon ProCenter, space chargeback can be configured and managed by:

- Defining a **Space chargeback configuration** (calculation method + calculated area rules)
- Linking properties to specific configurations for a defined time period
- Calculating monthly **Chargeback lines** based on space usage

During calculation, the system creates chargeback lines for each space usage. The costs are aggregated per month based on the number of days within that month. Both direct and indirect costs are calculated and stored in a single **Amount excluding tax / VAT** field. This consolidated amount enables consistent financial processing and supports integration with external systems such as SAP.

Chargeback costs can only be generated for **Spaces** that have valid **Space usages** within the assigned chargeback period.

For more information on creating **Reports**, see Fundamentals.

Roles using Space chargeback

- **Space Manager:** Oversees all spaces, ensures that space data (areas, room types, attributes) is correct, and maintains accurate space usage records for calculations.
- **Property Manager:** Ensures the correct chargeback configuration is assigned to properties during the correct periods.

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Space chargeback configuration

A **Space chargeback configuration** defines the method used to calculate chargeback costs for spaces. **Planon default** and **BOMA-A** methods can follow different rules and treat spaces in various ways. The chosen method determines how shared spaces are allocated across departments and how their costs are distributed.

Additionally, **Calculated area** defines how the physical area of a space is measured, such as walls or other structural elements.

Configured chargeback period for property

A configuration line that specifies which **Space chargeback configuration** applies to a property during a defined time period.

For example:

A property can be assigned to use a specific configuration (a combination of **Calculated area** and **Calculation method**) from 01/01/2026 to 12/31/2026.

Chargeback lines

Chargeback lines are the calculated monthly costs for a given **Space usage**.

For example:

The chargeback cost for space usage for the month of **January 2026** would be represented as a single chargeback line.

Working with Space chargeback

This section describes the various functions available.

Adding a Space chargeback configuration

In **Space chargeback**, you can add a **Space chargeback configuration**.

Procedure

1. Go to Space chargeback configuration.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

   For information on the field descriptions, see Space chargeback configuration fields.
4. Click Save.

   You have now added a Space chargeback configuration.

Adding a Configured chargeback period for property

In **Space chargeback**, you can add a **Configured chargeback period for property**.

Procedure

1. Go to Configured chargeback period for property.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

   For information on the field descriptions, see Configured chargeback period for property fields.
4. Click Save.

   You have now added a Configured chargeback period for property.

Calculating chargeback costs

To calculate chargeback costs, proceed as follows:

Procedure

1. Go to Configured chargeback period for property.
2. On the action panel, click Calculate chargeback costs.
3. Click OK.

Chargeback calculation is resource-intensive. Running it now starts a background process and results may take time to appear.

Chargeback lines are created for spaces and can be viewed in the Chargeback lines selection step.

Space chargeback - Field descriptions

Space chargeback configuration fields

Field	Description
Calculated area	Select the area type used to calculate chargeback costs. The available options are **Net area**, **Rentable area**, and **Gross area**. The selected value determines which area measurement is used in the chargeback calculation.
Calculation methods	Select a calculated method from the list. The available options include a **Planon default** and **BOMA-A**, an American standard that defines how common areas are allocated to spaces for chargeback.

Configured chargeback period for property fields

Field	Description
Start date	Select the date from which space usages are included in the chargeback calculation. Only space usages occurring on or after this date are considered.
Calculate from date	Indicates the date from which the system starts calculating chargeback costs. This field is automatically populated when a start date is defined and is updated after each completed calculation period. If changes occur in related space usages, tariff groups, or space types that affect previously calculated costs, the date is automatically reset to the earliest impacted period so the system can recalculate the affected chargeback amounts.
Property	Select the property to which the chargeback configuration applies.
Chargeback configuration	Select the chargeback configuration that defines how space costs are calculated.

Field	Description
End date	Select the date until which space usages are included in the chargeback calculation. Only space usages occurring on or before this date are considered.

Chargeback lines fields

Field	Description
Space chargeback configuration line	Displays the period of the configuration line, including its start date and end date.
Modified on	Displays the date and time when the configuration line was last updated.
Space usage	Displays the code of the space usage.
Amount excluding tax / VAT	Displays the total amount of the configuration line excluding tax / VAT.

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