Transactions

Planon Software Suite
Version: L105

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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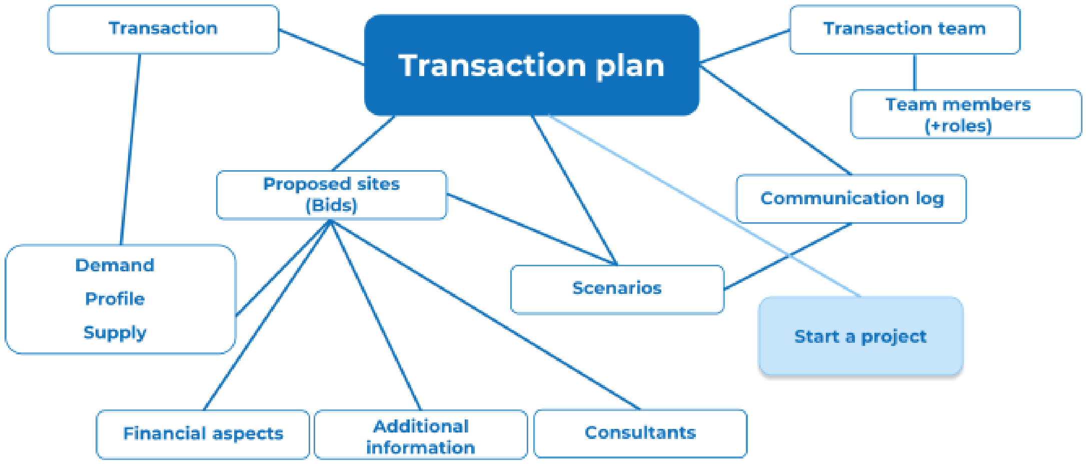

Transactions - Concepts

This section explains concepts available in the Transactions TSI and the way they are related to each other.

See the links below for more information:

- Transaction plan
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- Role
- Role player
- External party
- Aspects
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- Profiles
- Bid
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Transaction plan

A project to manage real estate transactions. The plan is created by either a buyer or a seller and it includes - amongst others listing properties, approving a loan and finally settling the transaction.

All requests for space that are to be included in the same project are added to a single transaction plan. Bids supplied by property brokers are also added to the plan and the most suitable bid for each request is then chosen.

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Transaction

A request for new space or a request to dispose of space.

An individual acting as a transaction manager receives requests for new space, or requests to dispose of existing space. Subsequently, the transaction manager adds the various transactions that are part of the same project to a single transaction plan. For example, requests for office space within the same city.

Transaction plan

Transaction plan

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Transaction team

A group of individuals assigned the task of implementing a transaction plan.

Transaction teams are added to a transaction plan at the **Components** > **Transaction teams** selection step.

Team member

Team member

External party

Adding a transaction team

Team member

An individual, company or external party nominated to join the transaction team in order to fulfill a particular role in the team.

Team members can include individuals from your own organization or those from external companies. Team members have a mandatory start date and end date. You can also apply a reference date to team members, which enables you to filter out team members whose start and/or end dates occur after or before the reference date.

Transaction team

Transaction team

Role player

Role

Role player

External party

Adding a transaction team

Role

A role represents the capacities and responsibilities of a team member.

Roles are defined in Supporting data > **Roles**.
Roles can include transaction manager, real estate agent, appraiser, legal adviser etc.

Team member

Role player

A role player represents an actor (person, company, external actor) with a specific role in a team.

Role players are either people from Personnel , companies from Addresses , or external actors who play a specific role in a transaction team as transaction team members.

Team member

Team member

External party

An external person or company that is not included in Personnel or Addresses , but who/which can be added to a transaction team. Usually, the external party is only involved for the duration of a transaction.

Select, add or delete external parties in the **External party** dialog box.

Team member

Transaction team

Aspects

Measurable criteria associated with a space and its surroundings, such as neighborhood quality, traffic congestion, distance from railway station etc. Aspects are qualified by ratings, which indicate how good or bad they are, and by numerical weightings, which indicate their importance.

Aspects and their corresponding ratings and weightings are specified in a profile. A profile's aspects, together with the aspect's minimum required score and weightings are then easily compared to the actual scores from bids. This enables a direct comparison to be made and the most suitable bid to be chosen.
Aspects can be divided into categories, which are defined and maintained in Supporting data .

Profiles

Ratings

Ratings

Profiles

Adding aspects to a profile

Ratings

The possible attributes (usually words, such as good, average, bad, etc.) that can be assigned to an aspect in order to qualify it.

You can define the possible ratings for a profile at the Ratings > Possible ratings selection step. You can then assign numeric values to the ratings in order to indicate which is the most desirable and which is the least desirable.

The minimum rating required for a specific aspect should also be defined in a profile.

You can add the actual scores in a bid at the Ratings > Actual scores selection step. You can also have the actual scores automatically added by Planon ProCenter.

Example

The aspect ‘Neighborhood quality’ is included in a profile.

For this aspect, the possible ratings you can define are Bad, OK, Good.

Value = 3 (Good)

Required rating = Yes

This means that the rating ‘Good’ is the minimum required score for the aspect ‘Neighbourhood quality’.

Aspects

Profiles

Aspects

Profiles

Adding ratings to aspects

Profiles

A list of aspects and their associated ratings.

Profiles enable you to add the possible and the minimum required score for an aspect. A numerical weighting is also assigned to each aspect to indicate its importance. The actual score for these aspects are then supplied in bids from property brokers. The aspects, together with their required score and weightings are then easily compared to the actual score from the bids to choose the best bid for a transaction request.

Some countries have standard profiles, such as the RE-norm in the Netherlands. Standard profiles are defined and maintained in **Basic Data**.

Example

Example structure of a profile:	Example of a profile:
Category 1	Social environment:
Aspect 1	Neighborhood quality
Rating 1	1. Bad
Rating 2	2. OK
Rating 3	3. Good
Aspect 2	Burglaries
Category 2	Financial:

Example structure of a profile:	Example of a profile:
Aspect 1	Aspect1
Rating 1	Rating 1

Profile:

Neighborhood quality:

Required score: 3. Good (this is the minimum required score)

Weighting: 7 (indicates the importance of this aspect)

The Neighborhood quality for Actual rating is Good.

Aspects

Ratings

Aspects

Ratings

Bid

Bid

Scenarios

Adding a profile

Bid

Sites proposed by brokers in response to a transaction request.

Bids contain the actual scores of aspects that are specified in a profile. A profile's aspects, together with the aspects' required score and weightings are then easily compared to the actual score in bids, allowing the most suitable bid to be chosen for a transaction request.

Transaction plan

Profiles

Profiles

Transaction

Scenarios

Adding a bid

Scenarios

Bids that meet the transaction requirements as specified in a profile.

Based on the bids provided, scenarios are created for a possible acquisition or disposal of space. The scenario that best matches the requirements specified in the request’s profile is chosen.

Example

Consider the following requests for space:

- 100 Sq ft office in New York
- 200 Sq ft office in New York

For these requests, the following bids are supplied:

- Bid A: 300 Sq ft for lease
- Bid B: 200 Sq ft to buy
- Bid C: 100 Sq ft to buy

The following scenarios are created:

- Scenario one: Bid A
- Scenario two: Bid B + Bid C

Depending on the bids combined in the scenarios, the scenario that best matches the transaction request’s profile is chosen.

Transaction

Bid

Profiles

History - Transactions

In Transactions , you can use the **Components** > **History** selection step to manually add a history of field changes or to view the complete history of automatic or manual field changes.

Maintaining history

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 via the **Log to communication log** field, the **Action** field will be updated to reflect the source. See also Communication log fields.

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

Adding communication logs

Working with Transactions

This section describes the processes and tasks that can be performed in the Transactions TSI.

See the links below for more information:

- Adding a transaction plan
- Adding a transaction
- Adding a transaction scenario
- Adding communication logs in Transaction Management
- Adding a transaction team
- Adding team members
- Adding a bid
- Adding a profile
- Adding aspects to a profile
- Adding ratings to aspects
- Adding actual scores
- Defining standard profiles
- Maintaining history

Adding a transaction plan

To create a transaction plan that includes transactions belonging to the same project:

Procedure

1. Go to Transaction plans.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. For a description of these fields, refer to Transaction plan fields
5. Click Save.

Transaction plan

Adding a transaction

To create a request for the acquisition of space or for the disposal of space:

Procedure

1. Go to Components > Transactions.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. For a description of these fields, refer to Transaction fields
5. Click Save.

Transaction

Adding a transaction scenario

To create a request for the acquisition or disposal of space:

Procedure

1. Go to Components > Transactions.
2. On the Scenarios action menu, click Add.
3. For a description of these fields, refer to Transaction scenario fields
4. Click Save.
5. Go to the Profiles > Bids selection step and add the bids belonging to this scenario.

Transaction plan

Adding communication logs

To add memos of all relevant communication on the selected transaction plan, transaction, transaction scenario or bid, such as emails, telephone calls, reports, etc.

Procedure

1. Go to Communication logs > transactions.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. Click Save.

For more information on communication logs including the description of the fields, see *Fundamentals*.

Communication logs

Adding a transaction team

To create a team that is responsible for the transaction plan:

Procedure

1. Go to Components > Transaction teams.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. For a description of these fields, refer to Transaction team fields
5. Click Save.

Team member

Transaction team

Adding team members

To add members of the transaction team. These team members may be external contacts from **Contact Management** (company names and addresses), internal people from **Personnel Management**, or external parties that are from neither TSI, but nevertheless have a role to fulfill in the transaction team.

Procedure

1. Go to Profiles selection level > Team members selection step.
2. On the Role players action menu, click Add contacts, or Add personnel or Add external parties.
3. For a description of these fields, refer to Team member fields
4. Click Save.

A role player can be added while several teams are selected. After clicking **Add** on the **Role players** action menu, a dialog box appears in which you must first select the relevant transaction team to which the team member is added.

Adding a bid

To add the bids for a transaction:

Procedure

1. Profiles > Bids.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. For a description of these fields, refer to Bid fields
5. Click Save.

You have now created a bid.

> The financial aspects of a bid are added at the Aspects > Financial aspects selection step. Additional information on a bid can be added at the Aspects > Additional information step.
> At the Aspects > Bids – Consultants selection step you can register a variety of consultants that are involved in the bid, such as real estate agents. For details on the fields available to consultants, see Adding team members.

> Use the **Generate Actual scores** option to have Planon ProCenter automatically create actual scores for the aspects of the profile to which the bid belongs. The actual scores generated are then available at the Ratings > Actual score step. Note that you can also manually add actual scores at the Ratings > Actual score step.

Transaction plan

Transaction

Bid

Adding a profile

To create a profile that specifies the conditions the requested space is to meet.

Procedure

1. Go to Profiles.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. For a description of these fields, refer to Profile fields
5. Click Save.

You have now created a profile. The next step is to add aspects and ratings to the profile.

> You can also define a standard profile in **Basic Data** and use it in **Transaction Management**. To use a standard profile, on the **Profiles** action menu, click **Add based on standard**.

Profiles

Adding aspects to a profile

Adding ratings to aspects

Defining standard profiles

Adding ratings to aspects

Adding aspects to a profile

To add relevant evaluation criteria associated with a space to a profile.

Procedure

1. Go to Aspects > Profiles selection step, select the profile to which you want to add aspects and ratings.
2. Go to the Aspects selection level.
3. On the action menu, click Add.
4. In the data section, complete the relevant fields.
5. For a description of these fields, refer to Aspects to a profile fields
6. Click Save.

   Repeat this procedure for other aspects you want to add to the profile.

Adding a profile

Aspects

Adding ratings to aspects

Defining standard profiles

Adding ratings to aspects

To add the possible ratings for the aspects in a profile.

Procedure

1. Go to Ratings > Possible ratings > Profiles, select the profile for which you want to define possible ratings.
2. Go to the Aspects selection level.

3. Select the aspect for which you want to define possible ratings.
4. Go to the Ratings selection level.
5. On the Possible ratings action menu, click Add.
6. In the data section, complete the relevant fields.
7. For a description of these fields, refer to Ratings to aspects fields.
8. Click Save.

   Repeat this procedure for other ratings you want to add to an aspect.

Adding a profile

Ratings

Adding a profile

Adding aspects to a profile

Adding actual scores

Defining standard profiles

Adding actual scores

To add the actual scores specified in bids.

Procedure

1. Go to Ratings > Actual scores.
2. At the Transaction bids selection step, select the bid from which you want to add actual scores.

   To manually add actual scores, proceed with the following steps.

3. Go to the Aspects selection level.
4. Select the aspect for which you want to add actual scores.
5. Go to the Ratings > Actual scores selection step.
6. On the Actual scores action menu, click Add.
7. In the data section, complete the relevant fields.
8. For a description of these fields, refer to Actual score fields
9. Click Save.

Repeat this procedure for other actual score you want to add.

Adding ratings to aspects

Defining standard profiles

To create a standard profile that can be used as a profile in a transaction plan.

Procedure

1. Go to Supporting data > Standard profiles.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields.
4. Click Save.

   You have now created a standard profile. You can proceed by adding categories (if required), aspects and ratings to the standard profile.
5. Go to the Categories selection level if you want to use categories.
6. Go to the Aspects selection level to add aspects to the standard profile.
7. Go to the Possible ratings selection level to add ratings to the aspects.

Adding a profile

Adding aspects to a profile

Adding ratings to aspects

Maintaining history

To keep track of changes made to a transaction plan. This 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 a transaction plan you want to keep a history on.

In **FieldDefiner**, you can enable an automatic **History** option for individual fields belonging to transaction plans. Once this option is enabled for a field, changes to that field's value are saved automatically. These changes can then be viewed on the **History** selection step.

> For details on changing field attributes, see *FieldDefiner*.

The Components > History selection step displays a transaction plan's history. For a description of the **History** selection step, refer to History fields

History - Transactions

Transactions – Field Descriptions

Transaction plan fields

Field	Description
Code	Enter a code for the transaction plan.
Description	Enter a name for the transaction plan.
Planned start date	Enter the planned start date for the transaction plan.
Actual start date	Enter the actual start date for the transaction plan.
Planned end date	Enter the planned end date for the transaction plan.
Actual end date	Enter the actual end date for the transaction plan.

Transaction fields

Field	Description
Code	Enter a code for the transaction request.
Description	Enter a name for the transaction request.
Transaction plan	Select the transaction plan the request should be linked to. Note that one or more requests can be linked to a transaction plan.
Actual start date	Enter the date as of which the requested space is needed.
Actual end date	Enter the date as of which the requested space is no longer needed.
Request date	Enter the date the request was submitted. This is not the creation date in Planon ProCenter but the actual date of the request.
Requested completion date	Enter the date the requested space should be available.

Field	Description
Requestor	Select the person that submitted the request from a pick list containing the persons registered in **Personnel Management**.
Department	Select the department that applies to the request from a pick list containing the departments registered in Planon ProCenter.
Cost center	Select the cost center that applies to the request from a pick list containing the cost centers registered in Planon ProCenter.
Contact from Personnel Management	Select a person from **Personnel Management** using the pick list.
External company involved	Select a contact from **Contact Management** using the pick list.
Property	Enter the property in which the requested space is located.
Rentable unit	Enter the rentable unit in which the requested space is located.

Transaction scenario fields

Field	Description
Code	Enter a code for the scenario.
Description	Enter a name for the scenario.
Transaction plan	Enter the transaction plan the scenario should be linked to. A scenario always belongs to a transaction plan. A transaction plan can include more than one scenario.

Transaction team fields

Field	Description
Code	Enter a code for the team.
Description	Enter a name for the team.

Field	Description
Project	Displays the name and code of the linked transaction plan.

Team member fields

Field	Description
Contact	This mandatory field is displayed if you click **Add Role players — contacts**. Select a contact from Addresses using the pick list.
Person	This mandatory field is displayed if you click **Add Role players — personnel**. Select a person from Personnel using the pick list.
External party	This mandatory field is displayed if you click **Add Role players — external parties**. Select an external party from the pick list.
Role	Select a role that the team member is going to fulfill. Roles must be maintained in Supporting data .
Start date	Enter the team member's start date.
End date	Enter the team member's end date.
Comment	If required, enter an additional comment on the team member.
Code	Enter a code for the team member.
Description	Enter a description for the team member.

Bid fields

Field	Description
Code	Enter a code for the bid.
Description	Enter a name for the bid.
Transaction	Select the transaction for which the bid is created.
Transaction plan	Select the transaction plan the bid should be linked to.

Field	Description
Contact from Personnel Management	Select a person from **Personnel Management** using the pick list.
Contact from Contact Management	Select a contact from **Contact Management** using the pick list.
Proposed start date	Enter the date as of which the space offered is available.
Proposed end date	Enter the date until which the space offered is available.
Proposed expiry date	Enter the date from which the bid will no longer be valid. The bid must be accepted before this date.
Property	Enter the property that will be sold, leased or bought.
Rentable unit	Enter the rentable unit that will be sold, leased or bought.

Profile fields

Field	Description
Code	Enter a code for the profile.
Description	Enter a name for the profile.
Transaction	Enter the transaction for which the profile is defined.

Aspect fields

Field	Description
Code	Enter a code for the aspect.
Description	Enter a name for the aspect.
Profile	Select the profile to which the aspect belongs.
Weighting	Use this field to indicate the importance of the aspect.
Required score	Indicates the minimum required score for the aspect as specified at the **Possible ratings** selection step.

Field	Description
Actual scores	Indicates the actual scores for the aspect from the various bids as entered at the **Actual scores** step.

Rating fields

Field	Description
Code	Enter a code for the rating.
Description	Enter a name for the rating.
Aspect	Enter the aspect to which the rating applies.
Value	Specify the value of the rating.
Required score (Y/N)	Use this field to indicate if this is the minimum required score for a specific aspect.

Actual score fields

Field	Description
Code	Enter a code for the rating.
Description	Enter a name for the rating.
Transaction bid	Indicates the bid to which the actual score belongs.
Aspect	Indicates the aspect to which the actual score applies.
Rating	Enter the actual score for the selected aspect.

History fields

Field	Description
Modification date-time	The date-time at which the change was entered in Planon ProCenter.
History added manually?	Whether the history line was added manually via the Add button on the History action menu.

Field	Description
Planon user	The name of the Planon user who made the change.
User field name	The field name of the changed field as it is known to the user.
System field name	The field name of the changed field as it is defined in the system.
Old value	The contents of the field prior to the modification.
New value	The contents of the field after the modification.
Transaction plan	The transaction plan to which the change applies.
Start date	The date at which the change becomes effective.

It is also possible to manually add history for the selected transaction plan. At the transaction plan's History step, click Add in the action menu and type a comment in the Comment field.

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