



User Guide | PUBLIC  
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# Product Assistance for Real Estate Development Lifecycle Management for SAP S/4HANA

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# 1 Real Estate Development Lifecycle Management for SAP S/4HANA

## Product Information

Product	real estate development lifecycle management for SAP S/4HANA
Release	1812 SP03
Based On	SAP S/4HANA 1709
	SAP S/4HANA 1809
	SAP S/4HANA 1909
<b>i Note</b> Installation on SAP S/4HANA 1909 is only possible together with <b>SP03</b> of <i>real estate development lifecycle management for SAP S/4HANA 1812</i> .	
Last Documentation Update	December 2020

The *real estate development lifecycle management for SAP S/4HANA* is an end-to-end solution, which helps real estate companies manage their business, from construction to marketing, sales, costing, invoicing, and so on. The application comprises of functions that enable the companies to manage and monitor their businesses efficiently.

## Features

The *real estate development lifecycle management application for SAP S/4HANA* supports various scenarios in the following main function areas:

- [Project Lifecycle Management \[page 4\]](#)
- [Cost and Contract Management \[page 22\]](#)
  - [FI Integration \[page 45\]](#)
- [Procurement and Bidding Management \[page 47\]](#)
- [Sales Lifecycle Management \[page 56\]](#)

## Configuration

For configuring *real estate development lifecycle management for SAP S/4HANA*, see:

- Customizing for Real Estate Development Lifecycle Management  
Execute transaction `SPRO` and choose ► [SAP Customizing Implementation Guide](#) ► [Real Estate Development Lifecycle Management](#) ►.
- Configuration information in the [Administration Guide for real estate development lifecycle management for SAP S/4HANA](#).

## 1.1 Project Lifecycle Management

The Project Lifecycle Management (PLM) module allows you to create and maintain the entire real estate project.

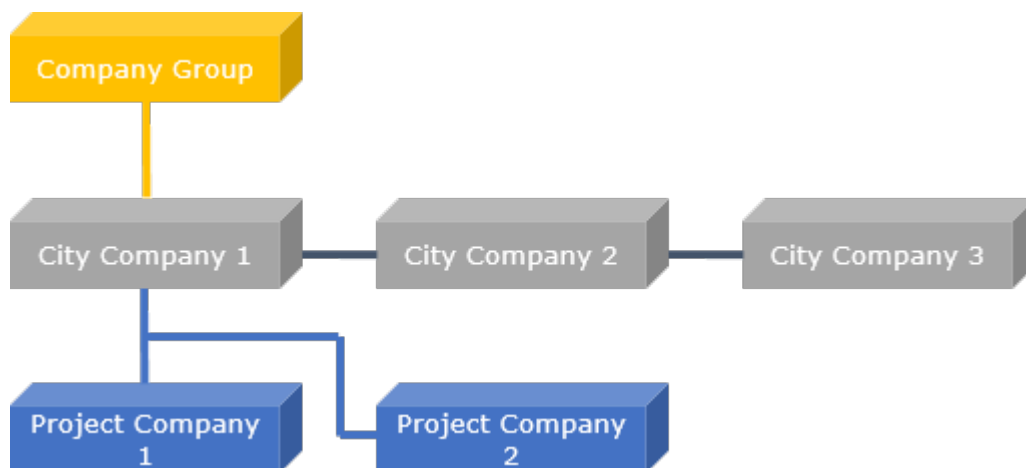
Project Lifecycle Management (PLM) consists of the following functions:

- [Organizational Management \[page 4\]](#)
- [Project Structure Management \[page 6\]](#)
- [Area Maintenance \[page 10\]](#)
- [Project Management \[page 13\]](#)
- [Project Quality Management \[page 19\]](#)

### 1.1.1 Organizational Management

The Organizational Management application allows you to define the structure of an organization.

An organization is defined by its structure. The structure refers to details about the organization such as its headquarter, branches, addresses. Before forming and managing a project for an organization, you must define its organizational structure. You can create an organizational structure or work on an existing organizational structure to view it in a read-only mode, or modify or delete it, as you may see fit. The organization can be structured in the system as follows:



## Features

- Create an organizational structure with a Company Group, City Companies, and Project Companies.
- Once you [Submit](#) an organizational structure that you have created, you can only mark an entity of the organizational structure as [Deleted](#). To do so, select the entity and click the [Delete](#) option. You can deselect the [Deleted](#) option for the entity. To do so, select the entity and click the [Activate](#) option.
- You can save the organizational structure as a spreadsheet. To do so, select the organization entity and click the [Export to Spreadsheet](#) icon.

## Related Information

[Creating an Organizational Structure \[page 5\]](#)

### 1.1.1.1 Creating an Organizational Structure

You can create an organizational structure for your company.

## Prerequisites

Configure an [Organizational Structure Type](#) in Customizing for [Real Estate Development Lifecycle Management](#) under ► [Project Lifecycle Management](#) ► [Define Organization Types](#) ►.

## Procedures

### Creating a Company Group

1. Select the [Project Life Cycle](#) module and click the [Organizational Management](#) tile.
2. Select an [Organizational Structure Type](#).
3. Click the [Display](#) option.  
The [Organizational Structure](#) screen appears.
4. Click the [Edit](#) option and select ► [New](#) ► [Root](#) ►.
5. Enter an ID for the company group as the [Entity ID](#).
6. Enter the name for the company group as the [Entity Name](#).
7. Select the [Entity Type](#) as **Group** and save your entries.

#### i Note

Maintain the entity type in Customizing for [Real Estate Development Lifecycle Management](#) under ► [Project Lifecycle Management](#) ► [Define Organization Entity Types](#) ►.

You can see the company group that you have created on the left pane.

### Creating a City Company

1. Select the company group for which you want to create the city company.
2. Select ► [New](#) ► [At Next Level](#) .
3. Follow steps from 5 through 7 of [Creating a Company Group](#).

You can see the city company that you have created under the group company on the left pane.

You can create multiple city companies for a group company depending on your organizational structure.

### Creating a Project Company

1. Select the city company for which you want to create the project company.
2. Select ► [New](#) ► [At Next Level](#) .
3. Follow steps from 5 through 7 of [Creating a Company Group](#).

You can see the project company that you have created under the city company on the left pane.

You can create multiple project companies for a city company depending on your organizational structure.

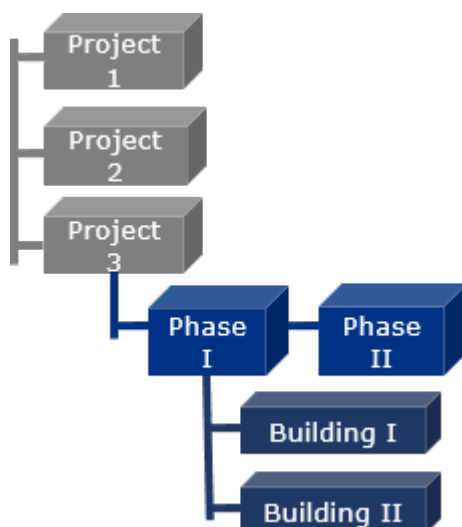
## Related Information

[Creating an Organizational Structure \[page 5\]](#)

## 1.1.2 Project Structure Management

The Project Structure Management application allows you to define the structure of a project.

Each project is typically executed in phases. Each phase can have multiple buildings. The project can be structured in the system as follows:



## Features

- Create a project structure with projects, phases, and buildings.
- Once you [Submit](#) a project structure that you have created, you can only mark an entity of the project structure as [Deleted](#). To do so, select the entity and click the [Delete](#) option. You can deselect the [Deleted](#) option for the entity. To do so, select the entity and click the [Active](#) option.
- You can save the project structure as a spreadsheet. To do so, select the project and click the [Export to Spreadsheet](#) icon.

## Related Information

[Creating a Project Structure \[page 7\]](#)

[Maintaining Property Types for a Building \[page 9\]](#)

### 1.1.2.1 Creating a Project Structure

You can create a project structure for your project.

## Procedures

### Creating a Project

1. Select the [Project Life Cycle](#) module and click the [Project Structure Management](#) tile.
2. Click the [New](#) option.  
The [Create Project](#) popup appears.
3. Select the project company as the [Organizational Entity ID](#). The project company is the one that you have created while creating an organizational structure.
4. Enter a [Project ID](#). This is a unique ID for your project.
5. Select the [Project Type](#) and click [OK](#). Configure the [Project Type](#) in Customizing for [Real Estate Development Lifecycle Management](#) under ► [Project Lifecycle Management](#) ► [Define Project Types](#) ►.  
The [Project Structure Maintenance](#) screen appears. You can see your project on the left pane. The system automatically creates a crossing phase when you create a project. A crossing phase can be used across projects.

#### Note

You can view the project information on the right pane. Additionally, you can edit some of the information.

### Creating a Phase

1. Select the [Project Life Cycle](#) module and click the [Project Structure Management](#) tile.



2. From the [Project Structure Maintenance](#) screen, search and select the project for which you want to create the phase.
3. Click the [Edit](#) option and choose ► [New](#) ► [At Next Level](#) ►.  
The [Create Items](#) popup appears.
4. Select the [Item Type](#) as **Phase**.
5. Enter the number of phases that you want to create and click [OK](#).  
You can see the phases under your project on the left pane.

## Creating a Building

1. Select the [Project Life Cycle](#) module and click the [Project Structure Management](#) tile.
2. From the [Project Structure Maintenance](#) screen, search for the project and select the phase of the project for which you want to create the building.
3. Click the [Edit](#) option and choose ► [New](#) ► [At Next Level](#) ►.  
The [Create Items](#) popup appears.
4. Select the [Item Type](#).
5. Enter the number of buildings that you want to create and click [OK](#).  
You can see the buildings under your project phase on the left pane.

### i Note

You can maintain the property types for the building.

## Related Information

[Managing Project Versions \[page 8\]](#)

[Maintaining Property Types for a Building \[page 9\]](#)

### 1.1.2.1.1 Managing Project Versions

You can use the [Revise](#) and [Upgrade](#) buttons to manage project versions.

If you need to update the basic information and structure of your project, you can use the [Revise](#) button. The revise feature increments the project version and updates the new version to the [In-Effect](#) process phase.

### i Note

Only effective project data can be revised. You cannot revise data in the [Archive](#) or [Draft](#) process phase.

If the stage of your project has been updated, you can use the [Upgrade](#) button to increment the stage and version of the project structure. The project stage entries are updated sequentially based on the configuration maintained in the [Stage](#) table (/RER/D\_STAGE). You can maintain the configuration using the Customizing activity [Define Next Project Stages](#) under ► [Real Estate Development Lifecycle Management](#) ► [Project Lifecycle Management](#) ► [Define Next Project Stages](#) ►.



The possible values for the project stage are as follows:

- 10: Design
- 20: Develop
- 30: Delivery

When you click on the [Upgrade](#) button, the project stage is automatically incremented to the next stage along with the version. On releasing the project, you can see an entry for the upgraded project structure in the project list.

On both revising and upgrading the project data, the old version of the data is set to [Archived](#). The latest version after releasing is set to [In-Effect](#). The new version data is copied to the archived version data of the project structure after releasing.

#### **i** Note

- Only effective data can be upgraded. You cannot upgrade data in the [Archive](#) or [Draft](#) process phase.
- If the project structure has reached the final project stage (30: Delivery), it cannot be upgraded further.
- You can also perform revise and upgrade for project phases, if you have enabled the [Migration](#) flag.

## Migration

If you want to implement phase management for your project structure, you must select the [Migration](#) flag. This flag will migrate your existing project information, enabling you to perform the latest enhancements and functionalities on project phases as well.

## Related Information

[Creating a Project Structure \[page 7\]](#)

### 1.1.2.2 Maintaining Property Types for a Building

Property types are attributes that describe the usage of a building.

## Prerequisites

You have created a project structure for your project company.

## Procedure

1. From the [Project Structure Maintenance](#) screen, search for the project and select the building of the project for which you want to maintain the property types.
2. Select the [Property Type](#) tab on the right pane.
3. In the [Combined Code of Property Types](#) section, click the [New](#) option.
4. Select the new row that appears in the table.
5. In the following [Property Types](#) section, maintain the various attributes for the building.
6. Save your entries.  
The system automatically assigns a [Property Type Combined Code](#), which is based on the property types selected by you.

## Related Information

[Creating a Project Structure \[page 7\]](#)

### 1.1.3 Area Maintenance

The Area Maintenance application allows you to maintain and manage information about individual area units of a building unit. For instance, you can maintain information such as the room size, the land size occupied by a room.

## Related Information

[Area Maintenance \[page 10\]](#)

[Adding an Area Index \[page 11\]](#)

[Maintaining a Project Area \[page 11\]](#)

#### 1.1.3.1 Area Index

The Area Index application allows you to define and maintain the area index based on the property type relevance, project phase, building, and different stages. You can then define the area for the project stage based on the area index.

You can:

- Add an area index
- Edit an area index
- Delete an area index

- Download a template - To maintain the information offline, download a template of the area index structure.
- Batch upload - Once you maintain the area index offline, upload it. The system adds the area indexes to the system.

## Related Information

[Area Maintenance \[page 10\]](#)

[Adding an Area Index \[page 11\]](#)

[Maintaining a Project Area \[page 11\]](#)

### 1.1.3.1.1 Adding an Area Index

You can add an area index.

## Procedure

1. Select the *Project Life Cycle* module and click the *Area Index* tile.  
The *Area Index Maintenance* screen appears.
2. Click the *Edit* option and then the *Add* option.  
A new row gets added to the table.
3. Define an area index with a description and select the relevant checkboxes.
4. Click *Save*.

### 1.1.3.2 Maintaining a Project Area

The Project Area application allows you to maintain the project stage area. You can also edit and display the stage areas.

Project area can be updated continually. It happens at several project stages, such land acquisition, conceptual design, detail design, or actual measurement. Each time the area is updated, a version is created.

## Prerequisites

- You have created a project structure. For more information, see [Creating a Project Structure \[page 7\]](#).
- You have maintained the property types for the building. For more information, see [Maintaining Property Types for a Building \[page 9\]](#).

## Procedure

1. Select the *Project Life Cycle* module and click the *Project Area* tile.  
The *Project Area Maintenance* screen appears.
2. Click the *New* option.  
The *Select Stage* popup appears.
3. Select the *Project ID*, project phase, and stage for which you want to maintain the area.
4. Enter the version if you have multiple area entries for the same project phase and stage, and select *OK*.  
The *Project Area Maintenance* screen appears.
5. On the left pane, select the phase or the building for which you want to maintain the area.
6. On the right pane, select the *Non-Property Type Relevant Area Index* tab.
7. Select the area index for which you want to maintain the area.
8. Enter the *Area* and save your entries.
9. Select the *Property Type Relevant Area Index* tab and select the *Edit* option.
10. Select the *Property Type Combined Code*.  
In the table below, you can see all the area indexes relevant for the *Property Type Combined Code*.
11. Select the area index for which you want to maintain the area.
12. Enter the *Area* and save your entries.  
The system creates an entry for the stage area.
13. Click the *Submit* option to release the area for this project stage.

## Related Information

[Comparing Project Area Versions \[page 12\]](#)

[Area Maintenance \[page 10\]](#)

[Area Index \[page 10\]](#)

### 1.1.3.2.1 Comparing Project Area Versions

If the version of a project is updated, you can use the *Compare* button to find the differences between the project area data of both the versions.

#### **i** Note

You can only select two project version entries to execute the compare function.

When you click on the *Compare* button, the project area data of the selected versions will be displayed side-by-side on the *Area Compare* screen. The following color codes are used to display the comparisons:

- Yellow: The yellow row indicates that the project area data has been changed in the new version.
- Green: The green row indicates that a new entry in the project structure (project item type, such as, phase or building) has been added in the new version.
- Purple: The purple row indicates that an entry in the project structure (project item type, such as, phase or building) has been deleted in the new version.

- No color: This indicates that the project area data was not changed in the new version.

## Related Information

[Maintaining a Project Area \[page 11\]](#)

## 1.1.4 Project Management

You can:

- Create project plans for a project phase
- Maintain deliverables for a task
- Maintain your project tasks

## Related Information

[Project Plan Management \[page 13\]](#)

[Deliverables Management \[page 17\]](#)

[Maintaining a Project Task \[page 18\]](#)

### 1.1.4.1 Project Plan Management

The Project Plan Management application allows you to create project main plans that include tasks, and milestones.

## Features

- Create a plan for a specific phase of a project.
- In a project plan, you can maintain the:
  - Checklist items
  - Tasks for checklist items
  - Milestones for tasks
- Assign planned start and end dates, and actual start and end dates to a plan.
- Assign a resource with a role to a plan.
- A plan can be managed and checked by versions.
- A plan is displayed in a table format.

- You can export a plan to a spreadsheet.

## Related Information

[Creating a Project Plan Template \[page 14\]](#)

[Creating the Main Plan \[page 15\]](#)

[Creating a Specific Plan \[page 16\]](#)

### 1.1.4.1.1 Creating a Project Plan Template

The Plan Template application allows you to create a project plan template to define the basic structure of a project plan.

You can use the plan template to create your main plan and a specific plan.

## Integration

The application uses the template creation function from *SAP Portfolio and Project Management for SAP S/4HANA*. For more information, see the SAP Help Portal under <http://help.sap.com>. Search for *SAP Portfolio and Project Management for SAP S/4HANA*. Select the *Product Assistance* link. Navigate to ► *Portfolio and Project Management* ► *Project Management* ► *Creation of a Project* ► *Templates* ►.

## Procedure

1. Select the *Project Life Cycle* module and click the *Plan Template* tile.  
The *Plan Template Management* screen appears.
2. Select the *Create* option.  
The *Project Plan Template Maintenance* screen appears.
3. You can create a template in the following ways:
  - Without a template
  - Based on an existing template

#### **i** Note

For more information on creating the template, see the *SAP Portfolio and Project Management for SAP S/4HANA* documentation.

4. Once you create the template, you must release it. To do so, set the *Change Status* field to *Release*.

## Related Information

[Project Plan Management \[page 13\]](#)

[Creating the Main Plan \[page 15\]](#)

[Creating a Specific Plan \[page 16\]](#)

### 1.1.4.1.2 Creating the Main Plan

The Main Plan application allows you to create the main plan for a phase of a project using the plan template. You use this main plan to create tasks and milestones. You can also assign deliverables to a task.

#### **i** Note

You can create only one main plan for a phase of a project.

## Procedure

1. Select the [Project Life Cycle](#) module and click the [Main Plan](#) tile.  
The [Main Project Plan](#) screen appears.
2. Click the [New](#) option.  
The [Main Plan Maintenance](#) screen appears.
3. Enter the [Project ID](#) and the [Phase](#).
4. You can select the plan template and save your entries.
5. To release the plan, click the [Release](#) option.  
The [Plan Maintenance](#) screen appears.

#### **i** Note

When you save the plan, only the plan header is created. Release the plan to create the tasks, milestones, and to enter the other details for the plan.

6. Enter the details of the plan and save your entries.

#### **i** Note

For more information on creating the plan, see the [SAP Portfolio and Project Management for SAP S/4HANA](#) documentation in the SAP Help Portal under <http://help.sap.com>. Search for [SAP Portfolio and Project Management for SAP S/4HANA](#). Select the [Product Assistance](#) link. Navigate to ► [Portfolio and Project Management](#) ► [Project Management](#) ► [Creation of a Project](#) ►.



## Related Information

[Creating a Project Plan Template \[page 14\]](#)

[Deliverables Management \[page 17\]](#)

### 1.1.4.1.3 Creating a Specific Plan

The Specific Plan application allows you to create a project plan for a specific purpose. You can create multiple specific plans for a project phase.

You create a specific plan when:

- You want to plan and monitor some tasks that are independent of the main plan.
- Some sub-steps of the main plan are too detailed or complex, and you want specific people or group to manage them.

A specific plan has the same structure as the main plan.

## Procedure

1. Select the *Project Life Cycle* module and click the *Specific Plan* tile.  
The *Specific Plan* screen appears.
2. Click the *New* option.  
The *Specific Plan Maintenance* screen appears.
3. Enter the *Project ID* and the *Phase*.
4. You can select the plan template and save your entries.
5. To release the plan, click the *Release* option.  
The plan maintenance screen appears.

#### i Note

When you save the plan, only the plan header is created. Release the plan to create the tasks, milestones, and to enter the other details for the plan.

6. Enter the details of the plan and save your entries.

#### i Note

For more information on creating the plan, see the *SAP Portfolio and Project Management for SAP S/4HANA* documentation in the SAP Help Portal under <http://help.sap.com>. Search for *SAP Portfolio and Project Management for SAP S/4HANA*. Select the *Product Assistance* link. Navigate to ► *Portfolio and Project Management* ► *Project Management* ► *Creation of a Project* ►.

## Related Information

[Creating a Project Plan Template \[page 14\]](#)

[Deliverables Management \[page 17\]](#)

### 1.1.4.2 Deliverables Management

Deliverables Management allows you to:

- Check the task status
- Upload the deliverables
- Complete the task

#### Features

- Create a relationship between a deliverable type and a task. See [Maintaining Deliverables \[page 17\]](#).
- Assign the task to a task owner while creating the plan.
- The task owner uploads the deliverables for the task. See [Maintaining a Project Task \[page 18\]](#).
- If a task has mandatory deliverables assigned to it, you cannot set the status of the task to **Completed** until the corresponding deliverables are uploaded.

## Related Information

[Maintaining Deliverables \[page 17\]](#)

[Maintaining a Project Task \[page 18\]](#)

### 1.1.4.2.1 Maintaining Deliverables

You can maintain the deliverables for a task.

#### Procedure

1. Select the *Project Life Cycle* module and click the *Main Plan* or *Specific Plan* tile.  
The *Main Project Plan* or *Specific Plan* screen appears.
2. Search for a plan and select it.

3. Click the [Maintain Deliverables](#) option.  
The [Project Deliverables Configuration](#) screen appears.
4. Select the project phase and click the [Replicate PPM Tasks](#) option.  
You can see all the tasks of the project plan on the left navigation pane.
5. Select a task.
6. To create a deliverable for the task, select the [Create](#) option.  
A new row gets added to the following table.
7. Enter a [Deliverable ID](#), and select a [Deliverable Class](#) and [Deliverable Subclass](#).
8. Select the [Mandatory](#) checkbox if the task cannot be completed without this deliverable.
9. Save your entries and click the [Release PPM](#) option.

## Related Information

[Creating the Main Plan \[page 15\]](#)

[Creating a Specific Plan \[page 16\]](#)

[Maintaining a Project Task \[page 18\]](#)

### 1.1.4.3 Maintaining a Project Task

The My Project Task application allows you to view and maintain the tasks assigned to you.

You can:

- View the tasks assigned to you
- View the deliverable types assigned to a task
- Upload the required deliverables for a task
- Set the status of the task to **Complete**

## Procedure

- Select the [Project Life Cycle](#) module and click the [My Project Task](#) tile.  
The [Project Task Maintenance](#) screen appears.
- Select the relevant task and select [Edit](#).
- Upload the required deliverables.
- Set the status of the task to **Complete** and save your entries.

#### i Note

If a task has mandatory deliverables assigned to it, you cannot set the status of the task to **Completed** until the corresponding deliverables are uploaded.

## Related Information

[Deliverables Management \[page 17\]](#)

[Maintaining Deliverables \[page 17\]](#)

## 1.1.5 Project Quality Management

The Project Quality Management application describes the quality management process for a project.

You can:

- Create a checklist for inspection.
- Maintain the inspection details for the building or project phase.
- Approve the quality inspection for the building or project phase.

## Related Information

[Maintaining the Checklist \[page 19\]](#)

[Maintaining Quality Inspection for a Project \[page 20\]](#)

[Approving the Quality Inspection for a Project \[page 21\]](#)

### 1.1.5.1 Maintaining the Checklist

The Checklist application allows you to create a checklist for quality inspection. This checklist is like a template. Use it to maintain the inspection details for the project.

## Prerequisites

- Maintain the *Department* for inspection in Customizing for *Real Estate Development Lifecycle Management* under ► *Project Lifecycle Management* ► *Define Departments* ►.
- Maintain the *Checklist Type* in Customizing for *Real Estate Development Lifecycle Management* under ► *Project Lifecycle Management* ► *Define Checklist Types* ►.
- Maintain the *Check Type* in Customizing for *Real Estate Development Lifecycle Management* under ► *Project Lifecycle Management* ► *Define Inspection Categories* ►.

## Procedure

1. Select the *Project Life Cycle* module and click the *Checklist* tile.  
The *Checklist Maintenance for Quality Inspection* screen appears.
2. Click the *New* option.  
The *Create Checklist with Department* popup appears.
3. Select the *Department* and *Checklist Type* for which you want to create the checklist. Enter a *Checklist Name* and click *OK*.  
The *Checklist Maintenance for Quality Inspection* screen appears.
4. To create check items, select the *Check Type*.
5. In the *Checklist Details* section, select the check item and weight for the same. The weight determines the quality inspection score.
6. For each check type, you can create multiple check items where you can provide the description for the check.

## Related Information

[Maintaining Quality Inspection for a Project \[page 20\]](#)

### 1.1.5.2 Maintaining Quality Inspection for a Project

The Quality Inspection application allows you to create the quality inspection details for a project phase or building.

## Prerequisites

Create the quality checklist to maintain the inspection details for your project.

## Procedure

1. Select the *Project Life Cycle* module and click the *Inspection* tile.  
The *Quality Inspection* screen appears.
2. Click the *New* option.  
The *Choose Checklist* popup appears.
3. Select the relevant checklist and click *OK*.  
The *Quality Inspection Maintenance* screen appears, which displays all the check items that you have maintained for the checklist.
4. Enter the header information. You can create the inspection details at the project phase level or at the building level.

5. Save your entries and click the [Submit](#) option. When you submit the inspection, it is released for approval by the inspector.

## Related Information

[Maintaining the Checklist \[page 19\]](#)

[Approving the Quality Inspection for a Project \[page 21\]](#)

### 1.1.5.3 Approving the Quality Inspection for a Project

As an approver, you can execute a quality inspection of the check items and can decide to approve the project.

## Prerequisites

Maintain the quality inspection details for the project and submitted it for approval.

## Procedure

1. Select the [Project Life Cycle](#) module and click the [Inspection](#) tile.  
The [Quality Inspection](#) screen appears.
2. Select the inspection that you have to inspect and approve.  
The [Quality Inspection Maintenance](#) screen appears, which displays all the check items for the project phase or a building.
3. Select the [Edit](#) option.
4. To view the checklist, select the checklist number hyperlink.
5. In the [Inspection Item Details](#) section, for each check item, select the [Pass](#) checkbox, if the item has passed the quality inspection.
6. Provide a rectification proposal for the check item.
7. Comprehensive evaluation
8. Upload an inspection document.
9. You can either approve the project or save your entries if you do not want to approve the project.

## Related Information

[Maintaining Quality Inspection for a Project \[page 20\]](#)

## 1.2 Cost and Contract Management

The Cost and Contract Management (CCM) module allows you to manage the entire lifecycle of costs and contracts related to a real estate project.

It consists of the following functions:

- [Cost Account \[page 22\]](#)
- [Target Cost \[page 24\]](#)
- [Allocating Target Cost for a Project \[page 26\]](#)
- [Contract Planning \[page 27\]](#)
- [Contract Management \[page 28\]](#)
- [Creating an Onsite Change \[page 32\]](#)
- [Creating a Design Change \[page 33\]](#)
- [Production Value Management \[page 37\]](#)
- [Invoice and Payment Request Management \[page 39\]](#)
- [Contract Settlement Management \[page 41\]](#)
- [Dynamic Cost Analysis \[page 44\]](#)
- [Allocating Dynamic Cost for a Project \[page 44\]](#)
- [FI Integration \[page 45\]](#)

### 1.2.1 Cost Account

The Cost Account application allows you to define the cost breakdown structure of the construction project. It defines the cost details of the project.

Cost accounts are used as budget planning baselines for the entire project. You can define the cost elements for cost calculation.

The cost accounts used in *real estate development lifecycle management for SAP S/4HANA* are different from standard SAP cost accounts. Hence, you have to map the cost accounts created here to the standard ones.

You can use this application to:

- Create cost accounts
- Edit an existing cost account
- Create a version of an existing cost account
- Download the cost account template, fill in the details, and do a batch upload. You can do the batch upload for a new cost account, for a new version of an existing cost account, or for an existing cost account.

### Features

- Cost accounts are linked with G/L accounts in chart of accounts.
- Cost accounts indicate the calculation design unit - area (m2), equipment (PC).



- Cost accounts are structured in hierarchy such that different departments can manage and control them by different organizational levels.

## Related Information

[Maintaining a Cost Account \[page 23\]](#)

### 1.2.1.1 Maintaining a Cost Account

You can create and maintain a cost account.

## Procedures

### Creating a Cost Account

1. Select the [Cost and Contract Management](#) module and click the [Cost Account](#) tile.  
The [Cost Account Maintenance](#) screen appears.
2. Click the [New](#) option.
3. Enter the [Version](#) details.
4. You can either create the cost accounts online, or do a batch upload of the cost accounts maintained offline.
  - **Create the cost accounts online**
    1. In the [Cost Account](#) section, click the [New](#) option.
    2. In the newly added row, enter the cost account ID and description.
    3. Enter the details for the cost account item. You can create multiple cost account items in a hierarchy. Save your entries.  
A draft version of the cost account is created.
  - **Batch upload of the cost accounts**
    1. Download a template by clicking the [Download Template](#) option.
    2. Fill in the details for cost account items in the downloaded sheet.
    3. Upload the cost account details by clicking the [Batch Upload](#) option. Save your entries.  
A cost account is created with the [Account Status](#) as **Draft**.
5. Click the [Submit](#) option to change the [Account Status](#) to **Active**.

### Editing a Cost Account

1. Select the [Cost and Contract Management](#) module and click the [Cost Account](#) tile.  
The [Cost Account Maintenance](#) screen appears.
2. Search and select the cost account that you want to edit.
3. Click the [Edit](#) option.
4. Make the changes as required. You can download a template and do a batch upload of the cost account items. Save your entries and submit to change the [Account Status](#) to **Active**.

## Creating a New Version of a Cost Account

1. Select the [Cost and Contract Management](#) module and click the [Cost Account](#) tile.  
The [Cost Account Maintenance](#) screen appears.
2. Search and select the cost account for which you want to create a version.
3. Click the [New Version](#) option.
4. Follow steps from 4 through 5 of [Creating a Cost Account](#).

## 1.2.2 Target Cost

The Target Cost application allows you to create and maintain target cost of each cost account included in the project. Target cost is set for the cost of an item. You can compare the target cost to the total cost to see if your target is met.

Target costs are created based on the selected cost accounts.

You can use this application to:

- Create a target cost for a project phase
- Edit a target cost in [Draft](#) process phase
- Create a version and adjust the target cost in [Approved](#) process phase
- Approve the target cost
- Allocate the target cost of one property type to another property type of the same or a different phase of the project

## Features

- You can create only one target cost for a project phase.
- You can create the target cost based on a cost account. For more information on cost account, see [Cost Account \[page 22\]](#).
- You can create the target cost based on the project area. This allows you to split the cost according to the property types. For more information on project area, see [Maintaining a Project Area \[page 11\]](#).

## Related Information

[Creating a Target Cost for a Project \[page 25\]](#)

[Allocating Target Cost for a Project \[page 26\]](#)

## 1.2.2.1 Creating a Target Cost for a Project

You can create and approve a target cost for a project phase.

### Prerequisites

- Create a project structure. For more information, see [Creating a Project Structure \[page 7\]](#).
- Maintain the project area. For more information, see [Maintaining a Project Area \[page 11\]](#).
- Create a cost account for the project. For more information, see [Maintaining a Cost Account \[page 23\]](#).

### Procedure

1. Select the [Cost and Contract Management](#) module and click the [Target Cost](#) tile.  
The [Target Cost Maintenance](#) screen appears.
2. Click the [New](#) option.  
The [Target Cost Creation](#) popup appears.
3. Select the project, project phase, and cost account number. You can select the reference stage.  
The [Target Cost Maintenance](#) screen appears.
4. Select the [Project Stage](#) and the [Area Version](#). This allows you to split the cost according to the property types. Save your entries.
5. Maintain the various costs.
  - **Main Construction Cost**
    1. Select the [Main Construction Cost](#) tab.  
The system lists all cost accounts for the main construction.
    2. Select a property type for the project phase.
    3. Select the [Calculation Index](#) for a cost account.
    4. Enter the [Index Value](#) and [Quantity](#), and press . The [Total Amount](#) of the property type and the parent node are updated automatically.
    5. Similarly, update all property types and save your entries.
  - **Non-Main Cost**
    1. Select the [Main Construction Cost](#) tab.  
The system lists all cost accounts for the non-main construction.
    2. Select the [Calculation Index](#) for a cost account.
    3. Enter the [Index Value](#) and [Quantity](#), and press . The [Total Amount](#) is updated automatically.  
Save your entries.
  - **Non-Main Cost Split**
    1. Select the [Non-Main Cost Split](#) tab.  
The system lists all cost accounts for the non-main construction.
    2. Select the [Allocation Scope](#) and the checkbox for the cost account.
    3. Click the [Split Scope](#) option.  
The popup with the property types for the phases appears.
    4. To select all the property types for the phase, select the checkbox for a phase. You can also select a particular property type.

5. Click the [Split Calculation](#) option.  
The [Summed-up Price](#) is split into property types according to the selected allocation rule.
6. Save your entries. Submit the target cost for approval. The approver can open the contract and approve it.

## 1.2.2.2 Allocating Target Cost for a Project

### Prerequisites

Create a target cost for the project. For more information, see [Creating a Target Cost for a Project \[page 25\]](#).

### Procedure

1. Select the [Cost and Contract Management](#) module and click the [Target Cost Allocation](#) tile.  
The [Target Cost Allocation - Select Item](#) screen appears.
2. Search and select the project.  
The [Target Cost Allocation](#) screen appears.  
The [Summary](#) section displays all the property types for the project with the amounts.
3. In the [Apportionment Rules: Out Property Types](#) section, select the property type **from** which you want to allocate the target cost amount to another property type of the project. The property type to which you are allocating can belong to another phase of the same project.
4. Click the [Selected](#) checkbox for the property type.
5. Enter the [Split-out Ratio](#) if you want to allocate a percentage of the amount. Else, you can enter the [Amount](#) that you want to allocate. Press .
6. In the [Apportionment Rules: Into Property Types](#) section, select the property type **into** which you want to allocate the target cost amount from another property type of the project.
7. Click the [Selected](#) checkbox for the property type.
8. Enter the [Split-into Ratio](#) if you want to allocate a percentage of the amount allocated in the [Out Property Type](#) section. Else, you can enter the amount that you want to be allocated. Press .
- The amount is allocated from [Apportionment Rules: Out Property Types](#) to [Apportionment Rules: Into Property Types](#).
9. Click the [Selected](#) checkbox for the property types in the [Apportionment Rules: Out Property Types](#) section. In the following section, for each property type selected, you can see the split of the target cost for the cost accounts as per allocation rules.
10. Click the [Selected](#) checkbox for the property types in the [Apportionment Rules: Into Property Types](#) section. In the last section, for each property type selected, you can see the split of the target cost for the cost accounts as per allocation rules.
11. Save your entries.

## Related Information

[Target Cost \[page 24\]](#)

### 1.2.3 Contract Planning

The Contract Planning application allows you to plan for the cost involved in the project for the vendor.

Modify or adjust the value of the contract in the contract planning stage.

Use a contract plan to control the budget of contract execution and monitor the progress of contract assignment.

You can use this application to:

- Create a target cost for a project phase
- Edit a contract plan, which does not have the *Approval Status* as *Approved*.
- Create a version and adjust the contract plan, for which the latest version has the *Approval Status* as *Approved*
- Approve the contract plan

## Features

- Create a contract plan based on the target cost.
- Add or delete a cost account in a contract plan.
- Create contract plans for a project phase. You can create multiple versions for a phase. The latest version of the contract plan should have the *Approval Status* as *Approved*.
- After creating a contract plan, you know the type of main contract in the project that you can sign with your vendors.

## Related Information

[Creating a Contract Plan \[page 28\]](#)

## 1.2.3.1 Creating a Contract Plan

You can create and approve a contract plan for a project phase.

### Prerequisites

- Maintain the target cost on which you want to base your contract plan. For more information, see [Creating a Target Cost for a Project \[page 25\]](#).
- Maintain the cost account for the project. For more information, see [Maintaining a Cost Account \[page 23\]](#).

### Procedure

1. Select the *Cost and Contract Management* module and click the *Contract Planning* tile.  
The *Contract Planning Maintenance* screen appears.
2. Click the *New* option. The *Contract Planning creation* popup appears.
3. Select the *Project ID*, *Project Phase*, and the *Target Cost Version*. Select *Ok*.
4. In the *Planned Contract* section:
  1. *Add Contract* option is used to add an existing contract plan.
  2. *Delete Contract* option is used to delete an existing contract plan.
  3. *Refer to Template* option is used to plan the contract based on a template.
  4. *Add Intercom Contract* option is used to add contracts across phases of the projects in the project structure. For example, you can divide the project into three or four phases.
5. In the *Planned Contract Details* section, click the *Add Account* option to add cost accounts. All the cost accounts associated with the target cost are displayed. Select the cost accounts that you want to include in the contract plan. The accounts that you select here are a part of a contract plan having a unique contract number that the system automatically generates.  
In the *Split Information* section, the cost is split between the different property types.
6. In the *Attachment* section, upload the documents related to the contract plan.
7. Save your entries. Submit the contract plan for approval. The approver can open the contract plan and approve it.

## 1.2.4 Contract Management

The Contract Management application allows you to create contracts for vendors.

After the vendors are selected for the construction in the bidding process, you can create the contracts for the selected vendors.

Cost accounts are automatically inherited by the contracts. You should select the bidding ID. The corresponding contract plan ID is automatically selected. The corresponding cost accounts are also automatically appended to the create contract screen.

The following are the available options:

- **New Contract:** It is used to create a contract.
- **New Supplement:** It is used to create any additional contracts related to the main contract. You can use this if you want to change the amounts from the main contract.
- **New Non-contract:** In some business cases, you may have some agreements that are managed by the system. These documents are approved but it is important to know that these documents are not contracts. It does not have an official seal. But these are some agreements that must be recorded in the system. If the customer has such requirements, they can manage non-contracts using this option.
- **Contract Planning:** Using this option, you can directly create a contract without any contract plan or bidding process. For example, if a contract is created first and later the contract plan is done. You can link them together using this option.

## Related Information

[Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#)

### 1.2.4.1 Creating a Contract, Supplement Contract or Non-Contract

You can create the main contract, a supplement contract, or a non-contract for the selected vendor.

## Prerequisites

- Create a contract plan on which you want to base your contract. For more information, see [Contract Planning \[page 27\]](#).
- Select the vendor using the bidding process. For more information, see [Bidding Process \[page 53\]](#).

## Procedure

1. Select the [Cost and Contract Management](#) module and click the [Contract Management](#) tile. The [Contract Management](#) screen appears.
2. Click the [New Contract](#) option.

### i Note

If you want to create a supplement contract or a non-contract, click on the [New Supplement](#) or the [New Non-contract](#) option respectively, and follow the steps below.

3. In the **Contract Info** tab:



1. In the [Contract Basic Info](#) section, select the project ID, project name, project phase, contract name.
2. Contract forms are of the following types:
  - **Main Contract:** This is the main contract.
  - **Supplement Contracts:** These are additional contracts associated with the main contract.
  - **Non-contract:** This is the non-contract based on the main contract.
3. Select the [First Level Classification](#). This is based on the contract type.
4. [Contract Second Level Classification](#) is about the secondary contract type.
5. Select the bidding plan number, price type, and planned contract number, and planned contract type.
6. Enter the details of the vendor that won the bidding.
7. In the [Amount](#) section, enter the contract amount information.
8. In the [Other Info](#) section, enter the contract terms in the [Terms of Contract](#) box and the contract payment terms in the [Contract Pmt Term Summary](#) box. Currently, the application does not have the function payment terms, like other standard SAP applications. Hence, if you want to define any payment terms, you must define them manually.
9. In the [Tax List](#) section, select the [Create](#) option and enter the tax details.
10. Upload any documents related to the contract.
4. In the **Split Amount** tab:
  1. ○ If you have entered the [Planned Contract No.](#) in [Contract Basic Info](#). section and have the [Planned Contract](#) field as [In Planned Contract](#) status, you can split the [Contract Amount](#) and the [Estimated Change Amt](#) into the costs associated with the contract plan. You see the main cost accounts for which the adjustment is done. All the cost accounts are automatically inherited from the contract plan.
    1. Enter the [Contract Amount](#) and the [Estimated Change Amt](#). The default values are derived from the [Contract Basic Info](#) section.
    2. When you click the [Split by Planned Contract](#) option, the [Contract Amount](#) and the [Estimated Change Amt](#) are split based on the ratio that you have defined in the contract plan for different property types.
  - If you have **not** entered the [Planned Contract No.](#) in [Contract Basic Info](#). section and have the [Planned Contract](#) field as [Not In Planned Contract](#) status, you can split the [Contract Amount](#) and the [Estimated Change Amt](#) by adding the cost accounts manually and entering the relevant columns to split amount.
    1. When you click the [Add Account](#) option, the system displays all the cost accounts for this project phase.
    2. Select the cost accounts you want to split the amount into. You can also select the cost account, then click [Delete Account](#) to delete the cost account.
2. If you want to resplit/split [Contract Amount](#) and [Estimated Change Amt](#) according to different split rules:
  1. Click the [Split Scope](#) option.  
The system displays all the property types for this project phase.
  2. Select the property types into which you want to split the amount.
  3. Select the [Split Rules](#). The first few split rules are maintained in area information:
    - Construction Area ( Area Index 01)
    - Salable Area (Area Index 02)
    - Footprint Area (Area Index 03)
3. Click the [Split Amount](#) option

If you select any of the above three split rules, the split is based on the ratio defined in the cost account and the amount is split accordingly for each property type you selected in *Split Scope*. The *Tax Amount* is also split accordingly.

4. Click *Display Tax* to display the *Tax Amount* split result.
5. To manually split the amount, enter the split amounts in the relevant columns.
5. In the **Supplement List** tab:  
Supplement contracts are any additional documents related to the main contract. If there are such agreements, all of them are displayed here.
6. In the **Onsite Change List** tab:  
If there are any documents related to onsite change, they are displayed here.
7. In the **Design Change List** tab:  
If there are any documents related to design change, they are displayed here.
8. **Production Value List** tab:  
If there are any documents related to production value, they are displayed here.
9. In the **Payment Request List** tab:  
If there are any documents related to payment request, they are displayed here.
10. In the **Invoice List** tab:  
If there are any documents related to invoice, they are displayed here.
11. In the **Associated Document** tab:  
If there are any associated documents for the contract, they are displayed here.
12. Save your entries. Submit the contract for approval. The approver can open the contract and approve it.

## 1.2.5 Change Management

The Change Management application allows you to make some adjustments to the main contract.

During the project execution, you may have to make some adjustments to the contract plan. It is done using the *Change Management* application. Change management and contract management are related and are used to modify the contract.

The following are the types of change management adjustments that can be done using this application:

- *Onsite Change*: It is used to manage and control the contract adjustment due to onsite changes. You can link it to the main contract and change the values of the main contract.
- *Design Change*: It is used to manage and control the contract adjustment due to design changes. You can link it to the main contract and change the values of the main contract. Design change happens after the construction has started. If the design team finds some issues, and they want to change the design, they must contact the construction team and negotiate the design change with them.

### i Note

The difference between onsite change and design change is that when the design change is done, it may impact several contracts. You may create one change request, but it may impact multiple contracts.

- *Associated Documents*: It is used to create additional contracts related to the main contracts. You can use an associated document if you want to change the amounts from the main contract. An associated document can be linked to several main contracts.

## Related Information

[Contract Management \[page 28\]](#)

[Creating an Onsite Change \[page 32\]](#)

[Creating a Design Change \[page 33\]](#)

[Creating an Associated Document \[page 35\]](#)

### 1.2.5.1 Creating an Onsite Change

You create onsite changes to the contract and link it to the main contract.

#### Procedure

1. Select the *Cost and Contract Management* module and click the *Onsite Change Management* tile.  
The *Onsite Change Management* screen appears.
2. Click the *New* option.
3. In the **Basic Information** tab:
  1. Enter the name of the contract adjustment in the *Change Name* field.
  2. Type the external ID of the contract adjustment in the *Change Number* field.
  3. Select the project that needs to be changed, using *Project Code* field. Select the *Project Phase*.
  4. Enter the *Estimated Amount*.
  5. Select the *Responsible Department* from the dropdown list. It is the department that raised the contract adjustment.
  6. Select the reason for which the change request is raised using the *Change Reason Type* field.
  7. Enter a description in the *Change Specific Reasons* field.
  8. Enter a description in the *Change Contents* field.
  9. In the *Attachment* section, upload the documents related to the onsite changes.
4. In the **Tax List** tab:  
Enter the changed tax details.
5. In the **Split Amount** tab:  
Allocate the price to the cost account. Its function is the same as in contract management. In the *Estimated Split Amount* and *Approved Split Amount* sections, you see the main cost accounts for which the adjustment is done. All the cost accounts are automatically inherited from contract management. The default values for *Estimated Amount* and *Approved Amount* are derived from the *Basic Information* tab.
  1. When you click the *Split by Main Contract* option, the *Estimated Amount* and *Approved Amount* are split based on the ratio that you have defined in the contract plan for different property types.
  2. If you want to resplit *Estimated Amount* and *Approved Amount* according to different split rules:
    1. Click the *Split Scope* option.  
The system displays all the property types for this project phase.
    2. Select the property types into which you want to split the amount.

3. Select the [Split Rules](#). The first few split rules are maintained in area information:
  - Construction Area (Area Index 01)
  - Salable Area (Area Index 02)
  - Footprint Area (Area Index 03)
3. Click the [Split Amount](#) option
 

If you select any of the above three split rules, the split is based on the ratio defined in the cost account and the amount is split accordingly for each property type you selected in [Split Scope](#). The [Tax Amount](#) is also split accordingly.
4. Click [Display Tax](#) to display the [Tax Amount](#) split result.
5. To manually split the amount, enter the split amounts in the relevant columns.
6. **Approvals**
  1. Click the [Estimated Approval](#) option to change the [Estimated Approval Status](#) from To be launched or blank to Approved.
  2. Click the [Approved Amount](#) option to change the [Approved Approval Status](#) from To be launched or blank to Approved.
  3. Click the [Approve](#) option to change both the [Estimated Approval Status](#) and [Approved Approval Status](#) from To be launched or blank to Approved.

## Related Information

[Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#)

### 1.2.5.2 Creating a Design Change

You can create design changes.

## Procedure

1. Select the [Cost and Contract Management](#) module and click the [Design Change Management](#) tile.
 

The [Design Change Management](#) screen appears.
2. Click the [New](#) option to create a request for design change.
3. In the **Header Information** section:
  1. Enter the name of the contract adjustment in the [Design Change Name](#) field.
  2. Type the external ID of the contract adjustment in the [Design Change Number](#) field.
  3. Select the project that requires changes, using [Project Code](#) field. Select the [Project Phase](#).
  4. Enter the [Estimated Amount](#).
  5. Select the [Responsible Department](#) from the dropdown list. It is the department that raised the contract adjustment.
  6. Select the reason for which the change request is raised using the [Design Change Reason Type](#) field.

7. Enter a description in the *Design Changes* field.
4. In the **Related Contract** section:
  1. Add the contracts that are impacted by the design change. Enter the *Estimated Amount* and *Approved Amount*.
  2. Select the contract and click the *Split* option.  
The *Split Page* popup appears.  
Allocate the price to the cost account. Its function is the same as in contract management. In the *Estimated Split Amount* and *Approved Split Amount* sections, you see the main cost accounts for which the adjustment is done. All the cost accounts are automatically inherited from contract management. The default values for *Estimated Amount* and *Approved Amount* are derived from the *Basic Information* tab.
    1. When you click the *Split by Main Contract* option, the *Estimated Amount* and *Approved Amount* are split based on the ratio that you have defined in the contract plan for different property types.
    2. If you want to resplit *Estimated Amount* and *Approved Amount* according to different split rules:
      1. Click the *Split Scope* option.  
The system displays all the property types for this project phase.
      2. Select the property types into which you want to split the amount.
      3. Select the *Split Rules*. The first few split rules are maintained in area information:
        - Construction Area (Area Index 01)
        - Salable Area (Area Index 02)
        - Footprint Area (Area Index 03)
      3. Click the *Split Amount* option  
If you select any of the split rules, the split is based on the ratio defined in the cost account. The amount is split accordingly for each property type you selected in *Split Scope*. The *Tax Amount* is also split accordingly.
      4. Click *Display Tax* to display the *Tax Amount* split result.
      5. To split the amount manually, enter the split amounts in the relevant columns.
5. In the **Tax Details** section:  
Add a row and enter the estimated amount for each of the contracts. In addition, enter the tax details of the contracts.
6. In the **Attachment** section:  
Upload the documents related to the design changes and save your entries.
7. **Approvals**
  1. Click the *Estimated Approval* option to change the *Estimated Approval Status* from To be launched or blank to Approved.
  2. Click the *Approved Amount* option to change the *Approved Approval Status* from To be launched or blank to Approved.
  3. Click the *Approve* option to change both the *Estimated Approval Status* and *Approved Approval Status* from To be launched or blank to Approved.

## Related Information

[Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#)

## 1.2.5.3 Creating an Associated Document

The Associated Document application is used to create different types of associated documents related to main contracts. A single main contract can have multiple associated documents..

### Procedure

1. Select the [Cost and Contract Management](#) module and click the [Associated Document](#) tile.  
The [Associated Document](#) screen appears.
2. Choose the type of document from the available options: [New Third-Party Contract](#), [New Performance Guarantee](#), [New Material Application](#), [New OEM Deduction](#), [New Engineering Deduction](#). For more information on these document types, refer to [Associated Document Types \[page 35\]](#).  
The [Associated Document Maintenance](#) screen appears.
3. Maintain the relevant fields, such as [Associated Document Type](#), [Exchange Rate](#), and [Responsible Department](#) in the sections [Basic Information](#), [Amount](#), and [Others](#).

#### i Note

Some of the fields on this screen might differ based on the [Associated Document Type](#) that you have selected. For details on these specific fields, refer to the subtopics.

4. You also have the option to upload a document as an attachment using the [Upload](#) button available at the bottom of the screen.
5. Click on [Save](#).

### Result

Your document is submitted for approval by the responsible department and an [Associated Document Number](#) is generated.

### Related Information

[Associated Document Types \[page 35\]](#)

[Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#)

## 1.2.5.3.1 Associated Document Types

You can create different types of associated documents using this application. These have been explained in detail in the sections below.

The procedure to maintain such documents is described in the previous topic: [Creating an Associated Document \[page 35\]](#).

## Third-Party Contract

When a third-party vendor is contributing to a project, an estimated amount from the project fund must be paid to them based on the effort spent by them. You can create a **Third-Party Contract** to manage such business scenarios.

## Performance Guarantee

To ensure non-violation of contract provisions during project execution, vendors must provide a monetary guarantee for the contract. You can create a **Performance Guarantee** document for such scenarios.

## Material Application

You can use the **Material Application** document to notify vendors about the purchasing materials required, their dates, and desired quantity during the execution of a contract.

To provide these details, enter the following information in the [Material List](#) section:

- Cost Account
- Cost Account Description
- Material/Equipment Number
- Material Equipment Description
- Quantity
- Base Unit of Measure

## OEM Deduction

If a particular vendor A assigned to a project could not finish it, the company appoints another vendor to complete the remaining project work. In such a case, some amount will be deducted from vendor A's cost, and accordingly paid to vendor B. You can create an **OEM Deduction** document to manage how much money will be deducted from vendor A and paid to vendor B.

To do this, you can create a [Deducted Contract List](#) by maintaining the following information:

- Contract System No.
- Contract Name
- Contract No.
- Amount



- Tax Rate (%)
- Tax Amount
- Amount Including Tax

## Engineering Deduction

If a vendor could not finish an assigned contract in the stipulated deadline, or if the quality of work is not up to the contract requirements, the vendor is liable for a cost deduction.

You can create an **Engineering Deduction** to manage such deduction scenarios. You can also choose the **Deduction Type** using the dropdown list available.

## Related Information

[Creating an Associated Document \[page 35\]](#)

## 1.2.6 Production Value Management

The Production Value application is used to manage the current value of the project posted by the construction team at the end of a certain period.

Typically, in project management, the construction team sends regular reports about the progress made. The construction team also reports the value of the tasks that are completed so that the real estate team can post them in the system.

Using this application, you can create a form of the product value and send it to the financial program. You can post these values so that they are allocated to the real financial account. You can raise this report at any time during the execution of the project.

For example, if the contract is 50% executed, the construction team posts the report to the real estate company and they enter half price of the contract into the system.

## Related Information

[Creating a Production Value \[page 38\]](#)

[Contract Management \[page 28\]](#)

## 1.2.6.1 Creating a Production Value

You can create product values.

### Procedure

1. Select the *Cost and Contract Management* module and click the *Production Value* tile.

The *Search Production Value* screen appears.

2. Click the *New* option.

The *Report Production Value* screen appears.

3. Search and select the contract for which you want to report the product value. Enter the mandatory information and save your entries. Click the *Return* option.

You go back to the *Search Production Value* screen.

4. Search and select the production value you just created and click the *Edit* option.

The *Production Value Maintenance* screen appears.

5. In the *Production Value Info* section:

1. In the *Basic Info* section:

Edit the fields as required.

2. In the *Amount* section:

Edit the values of the *Prd Value from Cons.Unit* and *Confirmed Production Value* fields as required. In the *Split Amount* section, the value of the *Confirmed Production Value* field changes accordingly.

6. In the *Split Amount* section:

You see the main cost accounts for which the adjustment is done. All the cost accounts are automatically inherited from contract management. The default value for *Confirmed Production Value* is derived from the *Confirmed Production Value* field value in the *Amount* section.

1. When you click the *Split by Main Contract* option, the *Confirmed Production Value* is split based on the ratio that you have defined in the contract plan for different property types.
2. If you want to resplit *Confirmed Production Value* according to different split rules:

1. Click the *Split Scope* option.

The system displays all the property types for this project phase.

2. Select the property types into which you want to split the amount.

3. Select the *Split Rules*. The first few split rules are maintained in area information:

- Construction Area (Area Index 01)
- Salable Area (Area Index 02)
- Footprint Area (Area Index 03)

3. Click the *Split Amount* option

If you select any of the split rules, the split is based on the ratio defined in the cost account. The amount is split accordingly for each property type you selected in *Split Scope*. The *Tax Amount* is also split accordingly.

4. Click *Display Tax* to display the *Tax Amount* split result.

5. To split the amount manually, enter the split amounts in the relevant columns.

7. Save your entries. The production value is sent for approval. The approver can open the production value and approve it.

8. Go back to the contract in the [Contract Management](#) application. You can see the production value item details in the [Production Value List](#) tab.

## Related Information

[Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#)

## 1.2.7 Invoice and Payment Request Management

The Invoice and Payment Request applications are used to create invoices for the project and payment requests based on the invoices.

During the course of the project, multiple vendors are used and multiple invoices are created. After you receive the invoice from the vendor, enter the information into the application and create the invoices. Based on the invoices, the corresponding payment requests are created and sent to the Finance Department.

This application is used for the following purposes:

- **Invoice management:**
  - Manage and control the invoices based on the contracts of the project.
  - Transfer invoice values to vendor balance management in the accounting book.
- **Payment Request Management:**
  - Manage payments of invoices
  - Create payment request for payment preparation

## Related Information

[Creating an Invoice \[page 39\]](#)

[Setting Up a Payment Request \[page 40\]](#)

### 1.2.7.1 Creating an Invoice

You can create invoices based on approved contracts.

## Procedure

1. Select the [Cost and Contract Management](#) module and click the [Invoice](#) tile.  
The [Invoice Management](#) screen appears.

2. Click the [New](#) option.
3. In the **Invoice** section:
  1. In the [Basic Information](#) section:
    1. Enter the [Invoice Document No.](#), which is the unique ID of the invoice that you received from the vendor.
    2. Select the [Invoice Type](#) from the dropdown menu.
    3. In the [Contract System Number](#) field, select the contract based on which you are creating the invoice.
  2. In the [Amount](#) section:  
Enter the [Invoice Amount](#) and the [Tax Rate \(%\)](#).
  3. In the **Others** section:  
Select the [Responsible Department](#).
4. In the [Split Amount](#) section:
 

You see the main cost accounts for which the adjustment is done. All the cost accounts are automatically inherited from contract management. The default value for [Invoice Amount](#) is derived from the [Invoice Amount](#) field value in the [Amount](#) section.

  1. When you click the [Split by Main Contract](#) option, the [Invoice Amount](#) is split based on the ratio that you have defined in the contract plan for different property types.
  2. If you want to resplit [Invoice Amount](#) according to different split rules:
    1. Click the [Split Scope](#) option.  
The system displays all the property types for this project phase.
    2. Select the property types into which you want to split the amount.
    3. Select the [Split Rules](#). The first few split rules are maintained in area information:
      - Construction Area (Area Index 01)
      - Salable Area (Area Index 02)
      - Footprint Area (Area Index 03)
  3. Click the [Split Amount](#) option  
If you select any of the split rules, the split is based on the ratio defined in the cost account. The amount is split accordingly for each property type you selected in [Split Scope](#). The [Tax Amount](#) is also split accordingly.
  4. Click [Display Tax](#) to display the [Tax Amount](#) split result.
  5. To split the amount manually, enter the split amounts in the relevant columns.
5. Save your entries. The invoice is created in the system and sent for approval. The approver can open the invoice and approve it.

## 1.2.7.2 Setting Up a Payment Request

You can create payment requests based on the approved invoices.

### Context

## Procedure

1. Select the [Cost and Contract Management](#) module and click the [Payment Request](#) tile.  
The [Payment Request](#) screen appears.
2. Click the [New](#) option.
3. In the **Basic Information** section:
  1. Enter the [Payment Request Name](#) and select the [Payment Request Type](#) from the drop-down menu.
  2. In the [Contract System Number](#) field, select the contract based on which you are creating the payment request.
4. In the **Amount** section:  
Enter the [Request Amount](#).
5. In the **Others** section:  
Select the [Responsible Department](#).
6. In the **Deduction** section:  
Click [New](#) to select a deduction type and amount - for example, water fees deduction, electricity charge deduction, and fine.
7. In the **Production Value** section:  
Click [Select Documents](#) to add relevant production value forms to the payment request. For more information, see [Production Value Management \[page 37\]](#).
8. In the **Attachment** section  
Upload the documents related to this payment request.
9. Save your entries. The payment request is created in the system and sent for approval. The approver can open the payment request and approve it.

## 1.2.8 Contract Settlement Management

The Contract Settlement application allows you to close the contract after the payment process is completed.

Contract settlement is a summary of the project. During the execution of the project, you may have added multiple adjustments and supplementary documents. Before closing the contract, enter some general information and create a summary.

## Related Information

[Creating a Contract Settlement \[page 42\]](#)

## 1.2.8.1 Creating a Contract Settlement

You can create contract settlements for a project.

### Procedure

1. Select the *Cost and Contract Management* module and click the *Contract Settlement* tile.  
The *Contract Settlement Management* screen appears.
2. Click the *New* option.  
The *Contract Settlement Maintenance* screen appears.
3. In the *Set up Basic Information* tab:
  1. In the *Contract System Number* field, select the contract based on which you are creating the invoice.  
The system pulls up the relevant information from the contract.
  2. Search and select the vendor who does the settlement review in the *Settlement Review Unit* field.
  3. Enter *Contract Start Date*, *Contract Completion Date*, *Actual Start Date*, and *Actual Completion Date*.  
*Contract Completion Date* is the planned date.
  4. Enter the other relevant information.
4. *Supplemental Agreement Information* tab:  
Displays all the additional agreements for the contract, if any.
5. *Contract Adjustment Item* tab:  
Displays all the cost adjustments done to the contract.  
You see the main cost accounts for which the adjustment is done. Here, you do a final cost adjustment. The default value for *Final Settlement Price* is derived from the *Final Settlement Price* field value in the *Set up Basic Information* tab.
  1. When you click the *Split by Main Contract* option, the *Final Settlement Price* is split based on the ratio that you have defined in the contract plan for different property types.
6. In the *Attachment* tab:  
Upload any attachments relevant for the contract settlement.
7. Save your entries. Submit the contract settlement for approval. The approver can open the contract settlement and approve it.

## 1.2.9 Dynamic Cost

Dynamic cost is used to compare the target cost with the actual cost.

Dynamic cost is the sum of all actual costs for the project phase. The actual cost includes:

- Contract amount
- Non-contract amount
- Supplement amount

- Onsite change amount
- Design change amount
- Associated document amount
- Not occurred planned contract amount

## Related Information

[Maintaining Dynamic Cost Warning Settings \[page 43\]](#)

[Dynamic Cost Analysis \[page 44\]](#)

[Allocating Dynamic Cost for a Project \[page 44\]](#)

### 1.2.9.1 Maintaining Dynamic Cost Warning Settings

You can maintain the settings to determine the alert status for dynamic cost amount to target cost amount ratio in dynamic cost analysis.

## Procedure

1. Select the *Cost and Contract Management* module and click the *Dynamic Cost Warning Settings* tile. The *Dynamic Cost Warning Settings* screen appears.
2. Search the project phase for which you want to maintain the alert ratios for dynamic cost analysis. The *Dynamic Cost Warning Settings* screen appears.
3. Select the relevant cost account.
4. Enter the *Early Warning Ratio (%)* and the *Strong Control Ratio (%)*.

#### i Note

The *Alert Status* in dynamic cost analysis is:

- **Green** if the dynamic cost amount to target cost amount ratio is less than or equal to the *Early Warning Ratio (%)*.
- **Yellow** if the dynamic cost amount to target cost amount ratio is greater than the *Early Warning Ratio (%)* and less than the *Strong Control Ratio (%)*.
- **Red** if the dynamic cost amount to target cost amount ratio is greater than or equal to the *Strong Control Ratio (%)*.

## Related Information

[Dynamic Cost Analysis \[page 44\]](#)

## 1.2.9.2 Dynamic Cost Analysis

The Dynamic Cost Analysis application allows you to display the dynamic cost and amounts for individual contract types of each cost account for the property type of the project phase.

### Procedure

1. Select the *Cost and Contract Management* module and click the *Dynamic Cost Analysis* tile.  
The *Dynamic Cost Analysis* screen appears.
2. Search the project phase for which you want to display the dynamic cost analysis.
3. Select the property type of the project phase.
4. For each cost account, you can see the target cost amount, dynamic cost amount, and amounts for individual contract types.
5. The *Alert Status* is determined by the dynamic cost amount to target cost amount ratio.

#### i Note

You must maintain the *Early Warning Ratio (%)* and the *Strong Control Ratio (%)* to determine the alert status. For more information, see [Maintaining Dynamic Cost Warning Settings \[page 43\]](#).

## 1.2.9.3 Allocating Dynamic Cost for a Project

### Prerequisites

1. Select the *Cost and Contract Management* module and click the *Dynamic Cost Allocation* tile.  
The *Dynamic Cost Allocation - Select Item* screen appears.
2. Search and select the project.  
The *Dynamic Cost Allocation* screen appears.  
The *Summary* section displays all the property types for the project with the amounts.
3. In the *Apportionment Rules: Out Property Types* section, select the property type **from** which you want to allocate the dynamic cost amount to another property type of the project. The property type to which you are allocation can belong to another phase of the same project.
4. Click the *Selected* checkbox for the property type.
5. Enter the *Split-out Ratio* if you want to allocate a percentage of the amount. Else, you can enter the *Spread Amount* that you want to allocate and press .
6. In the *Apportionment Rules: Into Property Types* section, select the property type **into** which you want to allocate the dynamic cost amount from another property type of the project.
7. Click the *Selected* checkbox for the property type.
8. Enter the *Split-into Ratio* if you want to allocate a percentage of the amount allocated in the *Out Property Type* section. Else, you can enter the amount that you want to be allocated and press .



The amount is allocated from [Apportionment Rules: Out Property Types](#) to [Apportionment Rules: Into Property Types](#).

9. Click the [Selected](#) checkbox for the property types in the [Apportionment Rules: Out Property Types](#) section. In the following section, for each property type selected, you can see the split of the dynamic cost for the cost accounts as per allocation rules.
10. Click the [Selected](#) checkbox for the property types in the [Apportionment Rules: Into Property Types](#) section. In the last section, for each property type selected, you can see the split of the dynamic cost for the cost accounts as per allocation rules.
11. Save your entries.

## 1.2.10 FI Integration

The Cost and Contract Management (CCM) module is integrated with the SAP Financial Accounting (FI) features.

It supports the following functions:

- [Production Value Posting \[page 45\]](#)
- [Vendor Invoice Posting \[page 46\]](#)
- [Payment Request Posting \[page 47\]](#)

### Prerequisites

Use transaction code `/rer/ccm0601` to configure the document type and accounts that are posted within the document.

### 1.2.10.1 Production Value Posting

The Production Value Posting application allows you to post the production values to Financial Accounting (FI).

### Procedure

1. Select the [Cost and Contract Management](#) module and click the [Production Value Posting](#) tile. The [Production Value Posting](#) screen appears.
2. Search and select the production value that you want to post to FI.
3. Click the [Post](#) option.  
The production value is posted to FI.

#### i Note

- You can post only those production values for which the [Production Value Status](#) is `In Effect` or `Reversed`.

- To reverse the posting, select the production value and click the [Reverse](#) option.

## Related Information

[Production Value Management \[page 37\]](#)

### 1.2.10.2 Vendor Invoice Posting

The Invoice Posting application allows you to post the vendor invoices to Financial Accounting (FI).

## Procedure

1. Select the [Cost and Contract Management](#) module and click the [Invoice Posting](#) tile.  
The [Invoice Posting](#) screen appears.
2. Search and select the invoice that you want to post to FI.
3. Click the [Post](#) option.  
The invoice is posted to FI.

#### **i** Note

- You can post only those invoices for which the [Status](#) is In Effect or Reversed.
- To reverse the posting, select the invoice and click the [Reverse](#) option.

## Related Information

[Invoice and Payment Request Management \[page 39\]](#)

[Creating an Invoice \[page 39\]](#)

## 1.2.10.3 Payment Request Posting

The Payment Request Posting application allows you to post the payment requests to Financial Accounting (FI).

### Procedure

1. Select the *Cost and Contract Management* module and click the *Payment Request Posting* tile.  
The *Payment Request Posting* screen appears.
2. Search and select the payment request that you want to post to FI.
3. Click the *Post* option.  
The payment request is posted to FI.

#### i Note

- You can post only those payment requests for which the *Status* is *In Effect* or *Reversed*.
- To reverse the posting, select the payment request and click the *Reverse* option.

### Related Information

[Invoice and Payment Request Management \[page 39\]](#)

[Setting Up a Payment Request \[page 40\]](#)

## 1.3 Procurement and Bidding Management

The Procurement and Bidding Management (PBM) module allows you to manage the entire lifecycle of the procurement and bidding process related to a real estate project.

It consists of the following functions:

- [Vendor Management \[page 48\]](#)
- [Procurement Plan \[page 52\]](#)
- [Bidding Process \[page 53\]](#)

## 1.3.1 Vendor Management

The Vendor management application allows you to maintain vendor information for contract and tendering.

### Features

- The vendor is also used in Accounting.
- The vendor can be extended to other organizations.
- The G/L account (accounts payable) is automatically updated with the vendor.

### Related Information

[Maintaining a Vendor \[page 48\]](#)

[Vendor Blacklist \[page 49\]](#)

[Vendor Assessment \[page 50\]](#)

### 1.3.1.1 Maintaining a Vendor

You can create, edit, and approve a vendor.

#### Creating a Vendor

1. Select the [Cost and Contract Management](#) module and click the [Vendor Management](#) tile.  
The [Vendor Management](#) screen appears.
2. Click the [New](#) option.  
The [Vendor Maintenance](#) screen appears.
3. Enter the [General Information](#) for the vendor.
4. Select the vendor classifications.

#### Note

Maintain the supplier classifications in Customizing for Real Estate Development Lifecycle Management under ► [Cost and Contract Management](#) ► [Maintain Vendor Classification Levels](#) ►.

5. To maintain the contact persons from the vendor organization, click the [New](#) option under the [Contact Persons](#) section.
6. If the vendor is associated with a [Company Code](#), you can view that in the [Companies](#) section. See the following [Adding Company Code](#) section.

7. Attach any documentation related to this vendor - for example, the business license scan document.
8. Save your entries. The contract is sent for approval. The approver can open the contract and approve it.

## Adding a Company Code to a Vendor

1. Select the *Cost and Contract Management* module and click the *Vendor Management* tile.  
The *Vendor Management* screen appears.
2. Click the *Add Company Code* option.  
The *Add Company Code for Vendor* screen appears.
3. Search and select the *Company Code* and select *Next Step*.  
The *Company Code* gets added to the vendor.

### 1.3.1.2 Vendor Blacklist

If the performance of a vendor is unsatisfactory or not acceptable, you can blacklist them using the **Vendor Blacklist** feature.

#### Procedure

1. On the *Vendor Blacklist* screen, click on the *New* button.  
The Blacklist Maintenance (*BL Maintenance*) screen appears.
2. In the *Processing Message* section, enter the *Vendor*, *Organizational Entity ID*, *Vendor Classification Number*, and *Date*.
3. Choose the *Process Type* from the following values:
  - *Warning*: The vendor is given a warning for their performance.
  - *Yellow Card*: This is similar to a warning but is of a higher priority.
  - *Red Card*: This is a high-priority warning.
  - *Blacklist*: The vendor can no longer engage in a contract with the particular organization.
4. You can also enter a *Note* and *Upload* a document as an attachment.
5. Click on *Save*. You can finally click on the *Approve* button.

#### Related Information

[Vendor Management \[page 48\]](#)

## 1.3.1.3 Vendor Assessment

Based on a vendor's performance in a contract, customers from various departments assess the vendor's performance. This process involves the following steps:

### Maintain Project Assessment Owner

On the [Maintain Project Assessment Owner](#) screen, enter the system name of the required owner in the [Assessment Owner](#) field. The assessment owner will be the approver of the vendor assessments based on the [Project ID's](#).

### Maintain Supplier Template

A supplier template is a questionnaire with a specific set of questions for the vendors. This template differs based on the [Phase](#). The two possible phases can be [Process Assessment](#) or [Post Evaluation](#). You can create a supplier template by following the steps below:

#### Procedure

1. On the [Supplier Template Maintenance](#) screen, maintain the following fields: [Template Code](#), [Template Name](#), [Contract Attribute](#), [Version](#), and [Status](#).
2. In the [Supplier Template Detail](#) section, click on [Create](#). Choose the [Phase](#) from the following dropdown options:
  - [Process Assessment](#): If a contract is still in progress and you want to evaluate the vendor's performance, you should choose this phase in your supplier template.
  - [Post Evaluation](#): If a contract has been successfully completed, the vendor has provided all the material/services, and all the payable accounts have been cleared, you should choose this phase in your supplier template.

#### i Note

Some questions in the supplier template might differ based on the type of phase.

3. Choose the [Est. Dimension](#) (Estimation Dimension) from the following dropdown options:
  - [QUALITY](#): This is an indicator to check if the vendor has delivered all the material/services as per the required quality standards.
  - [SCHEDULE](#): This is an indicator to check if the vendor has delivered all the material/services as per the scheduled timelines.
4. Enter the [Weight](#), [Assessment Index](#), [Minimum Score](#), [Highest Score](#), and [Score Criterion](#) of the material.

#### i Note

The sum of the weights in a certain phase must be 100.

5. Choose the [Department](#) from the dropdown list for the supplier template.

6. You can finally [Submit](#) the supplier template for approval.

## Result

On submitting the supplier template, it is set to status [Draft](#). Once approved by the owner, the template will be set to the [Active](#) status.

## Maintain Assessment Request

You can create a new assessment request through this application.

### Procedure

1. On the [Create Assessment](#) screen, click on the [New](#) button.
2. In the new line entry, choose the [Assessment Phase](#) from the following options:
  - Process Assessment
  - Post Assessment

#### i Note

You can create multiple process assessment requests for a contract/framework but only one post assessment request.

3. Maintain the other fields such as [Associated Document Type](#), [Vendor Name](#), [Vendor Classification](#), [Assessment Owner](#).
4. Click on [Save](#).

## Result

An [Assessment number](#) is generated for your assessment request. You can click on the assessment number to view all the assessment request details.

### Assigning an Assessor

The assessment owner needs to assign an **Assessor** for each request. In the details section, one [Line No.](#) entry will be created for each department with the individual assessor. The assessor will perform the evaluation of the assessment request created for their particular department.

1. In the [Assessor](#) field, enter the user ID of the required person.
2. Click on [Save](#).

To perform the evaluation of the assessment requests, the assessors need to follow these steps:

1. Click on the [Start Evaluation](#) button. A popup message `Assessment starts` will be displayed.
2. Click on the [Scoring](#) button. You can now assign an [Assessment Score](#) to each request in a specified range.
3. You can also click on the [Upload](#) button to attach a document with the request.
4. Once the evaluation has been completed, click on the [Submit](#) button.

## Result

The [Assessment Header Status](#) of the request will be now set to the status `In-assessment`. The [Avg. Score](#) will be calculated based on the weights and assessment scores of the requests.

Once all the requests created for a department have been scored, you can submit the evaluated request. The *Assessment Header Status* will be then set to the status `Assessed`.

On clicking the *Approve* button, an approval request will be sent to the owner.

## Related Information

[Vendor Management \[page 48\]](#)

## 1.3.2 Procurement Plan

You can create the following types of procurement plans using this application.

For information on how to create a procurement plan, refer to the topic: [Creating a Procurement Plan \[page 53\]](#)

### In-Advance Procurement

This procurement can be used to create a bidding with a single step only.

### Group Centralized Procurement

This procurement has the approval level as `Group` and involves multiple steps to create a bidding.

### Regional Centralized Procurement

This procurement has the approval level as `Region` and involves multiple steps to create a bidding.

### Project Procurement

This procurement has the approval level as `Project` and involves multiple steps to create a bidding.



## Related Information

[Creating a Procurement Plan \[page 53\]](#)

### 1.3.2.1 Creating a Procurement Plan

#### Context

You can create a procurement plan by following the steps below.

#### Procedure

1. On the [Search Procurement Plan](#) screen, click on the [New](#) button.
2. Choose the [Procurement Type](#) from the following options: In-Advance Procurement, Group Centralized Procurement, Regional Centralized Procurement, Project Procurement  
The [Procurement Plan](#) screen is displayed.
3. Enter the [Basic Information](#) details such as [Project No.](#), [Procurement Name](#), [Organization ID](#), and more.
4. Enter the information in the [Supply Category](#) and [Bid Information](#) sections.
  - You can use the [Track](#) feature to compare two versions of procurement plans.
  - You can use the [Attachment](#) feature to upload a document with the procurement plan.
  - You can use the [Change Log](#) section to view the modification history of the procurement plans.
5. Click on [Submit](#) to save your plan.

Some fields might differ based on the procurement type of the plan.

## Related Information

[Procurement Plan \[page 52\]](#)

### 1.3.3 Bidding Process

The Bidding application is used to select the vendors for construction work.

Bidding process consists of five steps. The first two are used to maintain general information about the bidding process such as City Company to which the project belongs. After that, bidding documents are sent to the

vendors using the *Issue of Bidding Documents* tab. In the fourth step, *Bid Opening and Evaluation*, the vendors return their applications to the real estate company. The real estate company evaluates the documents from the vendors. The fifth step *Bid Determination*, decides the vendor that signs the contract.

## Related Information

[Creating a Bidding Process \[page 54\]](#)

### 1.3.3.1 Creating a Bidding Process

You can create a bidding process to select the vendor for construction work.

#### Procedure

1. Select the *Cost and Contract Management* module and click the *Bidding Process* tile.  
The *Bidding Process* screen appears.
2. Search and select the project for which you want to create the bidding.
3. Click the *Create Bidding Process* option.
4. In the *Bidding Process* tab:
  1. Select the *City Company*.
  2. Select the *Tender Mode*.
  3. Select the project number using the *Item Number* field.
  4. Select the *Phase* and then select the department that raised the bidding using the *Preparation Department* field. Usually this is the same as the responsible department that you selected while creating the contract plan.
  5. Enter a brief description about the bidding contract in the *Scope of Procurement* field.
  6. Select the procurement type using the *Procurement Organization Form* field. It shows if the procurement is done by the real estate company itself or it is determined through an agency. If you select the second option, you should select the agency that is maintaining the system in the *Tender Agency* field.
  7. Select the *Procurement Type*.
  8. Define the organization unit that manages this procurement in the *ABC Classification* field.  
You have the following options:
    - Group
    - City company
    - Project company
  9. If the contract is very big, you can separate the bidding object. You can enter a reference number in the *Bid Sectioning* field.
  10. You can enter the description of the schedule of procurement process in the *Procurement Work Process and Schedule* field.

11. Enter the names of the panel that adjudge the bidding in the *Jury Composition* field. Then enter the evaluation and bid determination methods that you want to use. Enter the policy in the text box. Enter the prerequisites, if any, in the *Precondition for Bidding Procurement* box. Enter the name of the staff in the *Department Staff Involved*.
  12. Click the *Add* option in the *Tenders* section. Enter the *Bidding Section Name* in the relevant column. You had selected the procurement bid awarding options in the *Bidding Process* page. The application searches the database and finds the procurement determination documents for this project. Typically, there are multiple contracts for a project. All the contract plans are listed here. In the *Purchase Item Name* drop-down, you can view all the contract plans defined for the project. *Estimated Amount* is automatically carried from the contract plan that is based on the target cost.
  13. In the *Attachment* tab, you can upload any document related to the bidding.
5. In the *Bidding Documents* tab:
1. Select the *Scheduled Date* on which the bidding document is sent to the vendor. It is generally called the issue date of the bidding document.
  2. Select the *Schedule Date of Bid*. It is the date on which the vendor had sent the bidding document back. It is planned deadline.
  3. Select the date on which the evaluation of the quality of the vendors happen by using the *Opening Planned Date* field.
  4. Enter the address to which the bidding documents should be sent using the *Planned Location of Returning* field.
  5. Select the announcement date of the bidding process using the *Announcement/Invitation Letter Issued On* field. The company sends the announcement dates to the vendors. Using this date, you publicly announce that you are doing the bidding process.
  6. *Additions* field is used to determine if you are allowing the vendor to resend any document if it contained errors. For example, if they had forgotten to send a certificate document. *Number of Supplements* is how many times you are allowing them to correct the mistakes.
  7. *Max Bidding Price Limit Exists* is a function related to the price limitation of the bidding. You can set a limit or a base price for your bidding. If you have such limits, select the checkbox.
  8. Enter the details about the scope of the bid using the *Bidding Scope* field.
  9. Enter a description in the *Bidding Document Summary and Description* field.
  10. In the *Attachment* section, you can upload the template of the bidding document and/or requirement documents.
  11. Click *Next*.
6. In the *Issue of Bidding Documents* tab:
- The vendors selected for the bidding process are listed out with details like the bidding section number and name.
1. Select the date on which the invitation was sent to the vendor using the *Bid Invitation Issuing Date* field.
  2. You can also add other vendors to the list by clicking the *Add* option.
  3. You can use the *Create Supplier* option to create a vendor master.
  4. Click *Next*.
7. In the *Bid Opening and Evaluation* tab:
- You decide which vendor is useful for this project.
1. *Bid Invitation Response* checkbox is to check if the customer had sent the bidding documents back.
  2. *Valid* checkbox is to check if the document is valid.
  3. The returned amount is the price value the vendor sent back. *Bid Opening Place* is the address where the bid was opened. Enter the supervisor responsible for the bidding, and the bidding evaluation date

in the respective boxes. The details of the columns come from the bidding documents sent by the vendors.

4. Click [Save](#) and then select the vendor that is your supplier. It may be based on the cost. Then click the [Next](#) button.
8. In the [Bid Determination](#) tab:
  1. Select the checkbox for the bidders who should be recommended to win the bid using the [Recommended Winning Bidder](#) field. You can select multiple vendors.
  2. Enter a number to sort the order of the bids, in the [Sort Bid Evaluation Result](#) field. It is like ranking the bids. For example, the number 1 with the bid is given the priority, and so on.
  3. Select the date on which the notification is sent to the vendor, in the [Successful Bid Issue Date/Transaction Notification Date](#) field.
  4. Enter the seal type in the [Seal Type for Bid Winning Notice](#) field and enter the remarks.
  5. Click [Save](#) and then click [Next](#). The bidding process is completed.

## 1.4 Sales Lifecycle Management

The Sales Lifecycle Management (SLM) module allows you to manage the entire lifecycle of sales activities related to a real estate project.

It consists of the following functions:

- [House Management \[page 56\]](#)
- [Area Management \[page 61\]](#)
- [Customer Management \[page 62\]](#)
- [Sales Process Management \[page 64\]](#)
- [Price, Discount, and Commission \[page 74\]](#)
- [Sales Plan \[page 79\]](#)
- [Marketing and Sales Cost Management \[page 81\]](#)

### 1.4.1 House Management

The House Management application provides the following functions:

- [Generating House Master Data \[page 57\]](#)
- [Maintaining House Master Data \[page 58\]](#)
- [Batch Import of House Data \[page 58\]](#)
- [Batch Change of House Data \[page 59\]](#)
- [Changing House Status from Self-held to Salable \[page 60\]](#)
- [Managing Marketing Promotion \[page 60\]](#)

#### Note

To maintain area of a house, refer to Area Management. For more information, see [Area Management \[page 61\]](#).

To maintain price of a house, refer to Price, Discount, and Commission. For more information, see [Price, Discount, and Commission \[page 74\]](#).

## 1.4.1.1 Generating House Master Data

The House Generation application allows you to generate multiple houses for a property type.

### Procedure

1. Select the [House Management](#) module and click the [House Generation](#) tile.  
The [House Generation](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to generate a house.

#### **i** Note

For each property type, you can generate house only once.

4. Click the [Edit](#) option.
5. On the right side of the screen, enter the following generation parameters:
  - [Initial Floor](#) - For example, if first floor is of a different property type, you start house generation from second floor.
  - [Number of Floors](#) - Incremental from the initial floor you have entered
  - [Number of Units](#) that you access from one main entrance gate of a building. For example, if the building has two main entrance gates, from each entrance you can access two different houses on each floor. Hence, here you enter the units that you can enter through one gate.
  - [Number of Households](#) per unit
6. Click the [Simulate](#) option. The suggested house objects are displayed under [House Location Preview](#).
7. If you are satisfied with the simulation, save your entries.

### Related Information

[Project Structure Management \[page 6\]](#)

## 1.4.1.2 Maintaining House Master Data

The House Master Data application allows you to edit the house master data and create individual houses for a property type.

### Procedure

1. Select the [House Management](#) module and click the [House Master Data](#) tile.  
The [House Master Data](#) page appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the house for which you want to edit the master data.  
On the right side of the page, the house master data is displayed.
4. Click the [Edit](#) option.
5. You can edit the data under the [House](#) tab. The [Area](#), [Sales Progress History](#), and [Change Log](#) tabs display the respective information.
6. To create individual houses, select a property type in the project structure on left side of the screen.
7. Select [► Create ► House ►](#) and maintain house data on the right side of the page.
8. Select the [Delete](#) option to delete objects and sub-objects, or only sub-objects.

### Related Information

[Generating House Master Data \[page 57\]](#)

## 1.4.1.3 Batch Import of House Data

The Batch Import of House Data application allows you to upload data for multiple houses for a property type.

### Procedure

1. Select the [House Management](#) module and click the [Batch Import of House Data](#) tile.  
The [House Master Data](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to upload house data.  
On the right side of the page, the house master data is displayed.
4. Click the [Edit](#) option.
5. On the right side of the screen, click the [Template Download](#) option.  
A spreadsheet is downloaded to your system.

6. Maintain the house data in the spreadsheet.
7. Click the [Document Path – Browser](#) option to select the file, and then click the [Upload](#) option.
8. Review the data under [Import Preview](#). If the data is correct, save your entries.

## Related Information

[Project Structure Management \[page 6\]](#)

### 1.4.1.4 Batch Change of House Data

You can edit master data for several houses either online or by using the batch upload function.

## Procedure

1. Select the [House Management](#) module and click the [Batch Change of House Data](#) tile.  
The [Batch Change of House Data](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to upload house data.  
On the right side of the page, the existing house data for this property type is displayed.
4. On the right side of the screen, select the individual houses, or use the toolbar options for collective selection.
5. Click the [Edit](#) option in [House List](#) section. You can edit the selected house master data online.
6. To download and edit the data in a spreadsheet, click the [Download All Houses](#) option. After editing the data in the spreadsheet, click the [Upload Houses](#) option to apply the changes. Save your entries.

#### **i** Note

You can also select the [Delete Selected House\(s\)](#) option to delete house data.

## Related Information

[Generating House Master Data \[page 57\]](#)

[Maintaining House Master Data \[page 58\]](#)

[Batch Import of House Data \[page 58\]](#)

## 1.4.1.5 Changing House Status from Self-held to Salable

The House Status Change to Salable application allows you to change the house status from self-held to saleable.

### Procedure

1. Select the [House Management](#) module and click the [House Status Change to Salable](#) tile. The [House Status Change to Salable](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to upload house data.
4. Click the [Edit](#) option.
5. On the right side of the screen, select the [Convertible from Self-held to Salable](#) checkbox. Save your entries.

## 1.4.1.6 Managing Marketing Promotion

You can promote the house to the market and change the house status to [Ready for Sale](#).

### Prerequisites

Maintain the area and price for the house. See:

- [Maintaining Area for Houses in Batches \[page 61\]](#)
- [Maintaining Price Scheme for a House \[page 74\]](#)

### Procedure

1. Select the [House Management](#) module and click the [Marketing Promotion](#) tile. The [Marketing Promotion Management \(House Sales Control\)](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to manage marketing promotion. On the right side of the screen, the existing house data for this property type is displayed. The different colors represent the different statuses of the house. You can view the configured color codes by clicking the [Legend](#) option. To change the color of the status and description, select the [Sales System Configuration](#) module and click the [Color Control Table](#) tile. By default, the house status is gray. The house that is ready for promotion must have the area and standard price defined. To select a range of houses, select the [Range Selection](#) option, and select the first and last houses in the range.
4. Select the houses that are ready for promotion and click the [For Sale](#) option. The status of the house is changed to ready for sale and the color changes accordingly.



5. If the house is ready for sale, click the [Marketing Promotion](#) option.

#### **i Note**

You can select a maximum of 99 houses for a batch.

6. In the popup that appears, enter the marketing promotion batch (from 00 - 99) and the promotion date. Scroll down to see the marketing promotion details in the [Marketing Promotion List](#) section.
7. If the house is not available for sale, select the [Sales Control](#) option and enter the details in the popup that appears. For example, the company may want to hold the house for themselves for a brief period. You can see the details in the [Sales Control Record](#) section. Save your entries.

## **Related Information**

[Generating House Master Data \[page 57\]](#)

[Maintaining House Master Data \[page 58\]](#)

## **1.4.2 Area Management**

The Area Management application is used for:

- [Maintaining Area for Houses in Batches \[page 61\]](#)
- [Managing Area Compensation \[page 62\]](#)

### **1.4.2.1 Maintaining Area for Houses in Batches**

The Area Batch Management application allows you to maintain the area figures for the houses.

## **Prerequisites**

Configure the areas for which the houses are sold. To do so, select the [Sales System Configuration](#) module and click the [House Configuration – Area Type](#) tile.

## **Procedure**

1. Select the [Area Management](#) module and click the [Area Batch Management](#) tile. The [Batch Maintenance of House Area](#) screen appears.

2. Select the project and expand the project nodes on the left side of the screen.
3. Select the relevant property type.  
On the right side of the screen, the existing houses for this property type are displayed.
4. Select one or more houses for which you want to enter the area details.
5. In the [Select Area Type](#) section, select the area type.
6. In the [Import Preview](#) section, click the [Download Template](#) option to download the template in a spreadsheet. Enter the area details for the houses and then upload the spreadsheet using the [Upload Data](#) option. A preview of house area details is displayed. Save your entries.

## 1.4.2.2 Managing Area Compensation

The Area Compensation application is used to compare the area figures of different area types for the same house - for example, the actual measured area versus the estimated area of the house. Based on the area difference, receivable or refundable items can be generated.

Area compensation is executed based on the sales document. For more information, see [Sales Document \[page 65\]](#).

### Procedure

1. Select the [Area Management](#) module and click the [Area Compensation](#) tile.  
The [Area Compensation](#) screen appears.
2. Search and select the sales document relevant for your project.
3. If the selected documents are relevant for area compensation, the calculated results are displayed in the list area.
4. Save the document to generate the receivable or refundable items.
5. Submit the document for approval.

## 1.4.3 Customer Management

The Customer Management application allows you to manage customer accounts. You can create customer accounts and search existing customer accounts. The customer accounts can be individual or enterprise (also known as corporate).

You can use this application for:

- [Creating Customer Account \[page 63\]](#)
- [Creating Customer Follow-Ups \[page 63\]](#)

### 1.4.3.1 Creating Customer Account

The Customer Management application allows you to create a customer account.

#### Procedure

1. Select the [Customer Management](#) module and click the [Customer Management](#) tile.  
The [Customer Management](#) screen appears.
2. Click the [Create Individual Customer](#) or [Create Enterprise Customer](#) as required.
3. In the popup, provide customer details - [Project ID](#), [Customer Name](#), and [Registration Type](#). For individual customers, you also have to provide the [Mobile](#) number.  
The [Customer Details](#) screen appears.
4. In the [Basic Information](#) tab, enter detailed information pertaining to the customer.
5. In the [Project Information](#) tab, select the project and enter the [Purchase Intention](#) information. Save your entries.

A customer code is generated for the customer account. The customer modification log panel displays the change history for a customer account.

#### **i** Note

You can create multiple customer accounts in a batch. To do so, select the [Customer Management](#) module and click the [Customer Batch Import](#) tile.

### 1.4.3.2 Creating Customer Follow-Ups

A customer account may require follow-ups by an assigned property consultant for multiple reasons, such as providing recommendations to customers, resolving customer complaints, taking feedback, and so on. The Customer Follow-up application allows you to manage and track these follow-up contacts.

#### Procedure

1. Select the [Customer Management](#) module and click the [Customer Follow-up](#) tile.  
The [Customer Follow-up](#) screen appears.
2. Search and select a customer code.
3. Click the [New](#) option to create a customer interaction.  
The [Customer Follow-up Maintenance](#) screen appears.
4. In the [Record Information](#) section, select the [Follow-up Type](#), enter the [Follow-up Date](#), [Intention Level](#), and other applicable details. The intention level refers to the likelihood of the success of the follow-up.
5. In the [Follow-up Information](#) section, click [Create](#). Select the category and add the follow-up information such as log of the follow-up event. Save your entries.

### 1.4.3.3 Assigning Customer Accounts to Consultants

The Customer Assignment application allows you to assign property consultants to customer accounts. The property consultant is responsible for that customer account.

#### Procedure

1. Select the *Customer Management* module and click the *Customer Assignment* tile.  
The *Customer Assignment* screen appears.
2. Search for the customers and select the customers that you want to assign.
3. You can assign a specific consultant or assign at random.
  - Click *Reassign Property Consultant* to assign the customers to a specific consultant from a list of available property consultants.
  - Click *Randomly Assign Property Consultant* to randomly assign a consultant.

### 1.4.4 Sales Process Management

Sales process starts after the marketing promotion. It runs across a number of stages such as registration, reservation, contract, and house delivery. This application supports the following functions:

- [Sales Control Table \[page 65\]](#)
- [Sales Document \[page 65\]](#)
- [Creating Application Forms \[page 69\]](#)
- [Managing Cashier Workplace \[page 70\]](#)
- [Managing Receivables \[page 71\]](#)
- [Managing Cash Follow-up \[page 71\]](#)
- [Subscription and Contract Report \[page 72\]](#)
- [Performance Report \[page 72\]](#)
- [Maintaining a Payment Plan \[page 73\]](#)
- [Posting Sales Collection to Financial Accounting \(FI\) \[page 74\]](#)

## 1.4.4.1 Sales Control Table

The Sales control table gives an overview of the house status for a project. For an individual house, you can create the sales document and check the sales history.

### Procedure

1. Select the [Sales Process Management](#) module and click the [Sales Control](#) tile.  
The [Sales Control](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to view the house status.  
On the right side of the screen, the house status information for the selected property type is displayed.  
The different colors represent the different statuses of the house. You can view the configured color codes by clicking on the [Legend](#) option. To change the color of the status and description, select the [Sales System Configuration](#) module and click the [Color Control Table](#) tile.
4. From the [Action](#) drop-down, select the [Check House](#) option. When you hover the mouse over a house cell, the house key data is displayed including the area and price information for the house. When you click the house hyperlink, a popup appears with detailed information on the house.
5. You can select a creation action from the drop-down. If the house status permits the creation action, the relevant document opens. For example, if the [Create Reservation](#) option is configured, you can select it. If the house is in a saleable status, a screen appears to create the sales document for the house.

#### Note

Configure the creation action. Refer to the Administration Guide for more information.

## 1.4.4.2 Sales Document

The Sales Document provides information covering end-to-end sales processes for internal tracking and legal purposes.

You can define customer-specific sales document types. For more information, refer to the Administration Guide.

You can create sales documents using the following methods:

- Create a sales document from the [Sales Control Table](#). For more information, see [Sales Control Table \[page 65\]](#).
- Create a specific sales document from the [Sales Document](#) application, for example, a registration document. For more information, see [Managing Registrations \[page 66\]](#).
- Create a follow-up sales document from an existing sales document. For more information, see [Creating Follow-up Sales Documents \[page 67\]](#).

## Related Information

[Creating Follow-up Documents in a Batch \[page 68\]](#)

[Creating Application Forms \[page 69\]](#)

### 1.4.4.2.1 Managing Registrations

You can create registrations from the Sales Document application. You can either create individual registrations or multiple registrations.

## Procedures

### Create Individual Registrations

1. Select the *Sales Process Management* module and click the *Sales Document* tile.  
The *Search Sales Document* screen appears.
2. Select the registration type from the drop-down menu *Create Registration Order*.

#### i Note

You can configure the registration types. For more information, refer to the Administration Guide.

3. A registration order details screen appears. Enter the following information:
  - *Sales Order Key Information*
  - *Basic Information*
  - *Payment Plan* - Create a payment plan or choose an existing one.
  - *Equipment List* - In the case of a decorated house, you can add or delete an equipment - for example, an air conditioner. The *Unit Price* of the equipment affects the values of *Settlement Total Price* and *Settlement Unit Price* under the *Basic Information* tab.
  - *Attachment* - Upload a relevant document.

#### i Note

You can define the actual fields and tabs, or mandatory fields. To do so, select the *Sales System Configuration* module and click the *Customer Field Drop-Down Value Configuration* tile. For more information, refer to the Administration Guide.

Save your entries.

### Create Batch Registrations

1. Select the *Sales Process Management* module and click the *Sales Document* tile.  
The *Search Sales Document* screen appears.
2. Select the drop-down menu **► Create Batch Registration ► Batch Registration ▾**.  
The *Batch Registration* popup appears.

3. Enter the following information.

#### **i Note**

You can copy the data from a spreadsheet with the same column sequence, and paste it into the popup. In this way, you can create multiple registration documents.

Save your entries.

### **Batch Registration Reverse**

If a customer cancels a registration, you can reverse the registration with batch operation.

1. Select the [Sales Process Management](#) module and click the [Sales Document](#) tile.  
The [Search Sales Document](#) screen appears.
2. Select the registrations to be reversed.
3. Select the [Batch Registration Reverse](#) option.

## **1.4.4.2.2 Creating Follow-up Sales Documents**

You can create follow-up sales documents for the existing sales documents.


### **Prerequisite**

Configure the sales document types and the allowed document transitions. For more information, refer to the Administration Guide.

### **Procedure**

1. Select the [Sales Process Management](#) module and click the [Sales Document](#) tile.  
The [Search Sales Document](#) screen appears.
2. Search for the sales document and click the [Sales Document](#) hyperlink.  
The [Sales Order Details](#) screen appears.
3. From the [Order Operations](#) drop-down, select the [Convert to Delivery](#) option.

#### **i Note**

You can configure the options in the Customizing for [Assign Change to Action](#) under [SAP Customizing Implementation Guide > Real Estate Development Lifecycle Management > Sales Lifecycle Management > Sales Documents > Maintain Sales Document Actions](#) . Maintain [Action ID](#) `ROOT_CONVERT` for the specific document type.

4. The application reads the data from the relevant existing document, such as customer and house information. Maintain more data depending on the sales document configuration:

- [Basic Information](#)
  - [Discount](#) - Available discounts are maintained in the [Discount Scheme](#) application. See [Maintaining Discount Scheme for a House \[page 76\]](#).
  - [Payment Plan](#) - Available payment plans are maintained in the [Payment Plan](#) application. See [Maintaining a Payment Plan \[page 73\]](#).
  - [Co-owner](#)
  - [Parking Lot](#)
  - [Equipment List](#) - In the case of a decorated house, you can add or delete an equipment - for example, an air conditioner. The [Unit Price](#) of the equipment affects the values of [Settlement Total Price](#) and [Settlement Unit Price](#) under the [Basic Information](#) tab.
  - [Attachment](#) - Upload a relevant document.
5. You can also view the order-related information:
- [Related Orders](#)
  - [Area Compensation History](#)
  - [Property Consultant](#)
  - [Change History](#)
- Save your entries.

## Related Information

[Creating Follow-up Documents in a Batch \[page 68\]](#)

### 1.4.4.2.3 Creating Follow-up Documents in a Batch

You can create follow-up sales documents in a batch.

## Procedure

1. Select the [Sales Process Management](#) module and click the [Batch Conversion of Sales Documents](#) tile. The [Batch Conversion of Sales Documents](#) screen appears.
2. Select the project and expand the project nodes on the left side of the screen.
3. Select the property type for which you want to create follow-up sales documents. On the right side of the screen, the existing house data for this property type is displayed.
4. Select the houses. The selection of house depends on the convertible sales document availability. In the [House List](#) section, select the rows of available sales documents, and click the [Batch Convert](#) option to create follow-up sales documents.



## Related Information

[Creating Follow-up Sales Documents \[page 67\]](#)

### 1.4.4.3 Creating Application Forms

The Application Form Management application handles special requirements of customers. After the sales document - for example, a contract is reviewed - you cannot edit the document anymore. In such a case, you can create an application form to record the change request and submit the change.

## Procedures

### Create Application Form for Sales Document

1. Select the [Sales Process Management](#) module and click the [Sales Document](#) tile.  
The [Search Sales Document](#) screen appears.
2. Search for the sales document and click the [Sales Document](#) hyperlink.  
The [Sales Order Details](#) screen appears.

#### Note

The sales document should be in a specific status - for example, signed - to enable the options for creating the application form. For more information about sales document configuration, refer to the Administration Guide.

3. Select one of the following options in the [Apply For Changes](#) drop-down:
  - Payment Plan Change
  - House Return
  - Customer Change
  - House Change
  - Co-owner Change
  - Discount Change
  - Parking Lot Change
  - Equipment ChangeAn [Application Form](#) screen appears.
4. The information sections are different for each of the application forms. You can configure these sections. For more information, refer to the Administration Guide.
5. Maintain the required change information, and save your entries.

### Create Mortgage Application Form

Mortgage application is a special type of application form. The payable amount for vendor contracts are deducted by the sales contract amount.

1. Select the [Sales Process Management](#) module and click the [Application Form](#) tile.  
The [Application Form](#) screen appears.

2. Select the [Create Mortgage](#) option.
3. In the [Application Form Key Information](#) section, enter the [Project ID](#) and [Customer Code](#).
4. In the [Details](#) section:
  1. [Basic Information](#) is displayed.
  2. Upload a relevant document in the [Attachment](#) tab.
  3. In the [Cost Contract List](#) tab, click the [Create](#) option to add the available vendor contracts.  
The contract amount and deductible amount of each vendor contract is displayed.
  4. In the [Sales Contract List](#) tab, click the [Create](#) option to add the sales documents.  
The settlement amount of each sales document is displayed. Enter the actual deduction amount for each document.
5. Save your entries

## 1.4.4.4 Managing Cashier Workplace

The Cashier Workplace application is used to manage cash receipt and cash refund of the sales documents.

### Procedure

1. Select the [Sales Process Management](#) module and click the [Cashier Workplace](#) tile.  
The [Cashier Workplace](#) screen appears.
2. Search for the documents and click the [Sales Document](#) hyperlink.  
The [Cashier Register](#) screen appears.
3. Click the [Edit](#) option.
4. In the [Receivable / Retired / Transferred](#) section, select an entry for receivables.
5. In the [Actual Details](#) section, click the [Create](#) option to insert an entry for a receipt.
6. Enter the [Paid-in Amount](#) and select the [Settlement Method](#).
7. Click the [Complete Setting](#) option to update the receipt status.
8. To reverse an existing receipt, select an actual receipt line, and click the [Reverse](#) option.
9. To create an invoice, select an actual receipt, and click the [Invoice](#) option.  
A [Create Invoice](#) popup appears. The amount, price, and house address are prefilled from the sales document.
10. Enter the remaining fields where applicable, and click the [Confirm Invoice](#) option.
11. If you have created a wrong invoice, or you want to merge multiple invoices, in the [Receipt Pool](#) section:
  1. Select the relevant invoices, and click the [Exchange/Combine Receipt](#) option.
  2. In the [Invoice / Receipt Type Selection](#) popup, select whether you want to create an invoice or a receipt.
  3. If you select receipt, enter the receipt number. Click [OK](#). The selected invoices are changed to [Withdrawn](#) status, and you can create an invoice or receipt.

## 1.4.4.5 Managing Receivables

For overdue receivables, the Receivables Management application allows you to create a reminder and send it to the customer.

### Procedure

1. Select the [Sales Process Management](#) module and click the [Receivables Management](#) tile.  
The [Receivables Management](#) screen appears.
2. Search and select a document.
3. Click the [Create Reminder Card](#) option.
4. In the [Dunning](#) popup, enter the relevant details and save your entries.  
A message communicating successful creation of the dunning appears.
5. Click the message to open the dunning record for printing. Alternatively, go to the [Cash Follow-up](#) application and display the dunning record. For more information, see [Managing Cash Follow-up \[page 71\]](#).

## 1.4.4.6 Managing Cash Follow-up

The Cash Follow-up application is used for tracking dunning records and taking necessary actions with customers.

### Procedure

1. Select the [Sales Process Management](#) module and click the [Cash Follow-up](#) tile.  
The [Cash Follow-up Management](#) screen appears.
2. Search for the document and click the [Follow-up Number](#) hyperlink.  
A new screen with detailed dunning information appears.
3. Click the [Edit](#) option to append the note.
4. Click the [Print](#) option to create a reminder letter, which can either be printed physically or sent to the customer outside the system.

#### **i** Note

To enable printing, configure the print template. For more information, refer to the Administration Guide.

## 1.4.4.7 Subscription and Contract Report

The Subscription and Contract Report application provides a simple report to query the contract or payment information.

### Procedure

1. Select the *Sales Process Management* module and click the *Subscription and Contract Report* tile.  
The *Subscription and Contract Report* screen appears.
2. Search for the sales documents.
  - **Query on contract level** - All sales documents that fulfill the search criteria are displayed.
  - **Query on payment details** - Only those sales documents that contain the payment information are displayed.

## 1.4.4.8 Performance Report

The Performance Report application allows you to manage the actual performance for property or sales consultants for all their projects.

You can manage and view the entire performance-related information for the consultants. For example, you can view the projects assigned to the consultant, sale value, and actual sale amount received. This decides the performance of a property or sales consultant.

### Procedure

1. Select the *Sales Process Management* module and click the *Performance Report* tile.  
The *Performance Report* screen appears.
2. Search for the relevant sales documents.  
You can see detailed information for a performance submission, such as total sales price, currently received amount, property consultant name, and other such statistics.
3. Click the *Performance Submission* option to forward the performance details to the commission application. This information decides the commission that the consultant qualifies for.

## 1.4.4.9 Maintaining a Payment Plan

The Payment Plan application allows you to maintain master data for payment type and payment schedule, and is used in sales documents.

### Procedure

1. Select the *Sales Process Management* module and click the *Payment Plan* tile.  
The *Payment Plan* screen appears.
2. Click the *Create* option.  
The *Payment Plan Maintenance* screen appears.
3. In the *Header Data* section:
  - Enter the *Project ID* and the *Payment Plan Name*
  - Select the *Payment Plan Level* - Global or project-specific. Select *Global Level* if the payment plan is applicable for all projects.  
Select the *Property Type Value* - For more information, see [Maintaining Property Types for a Building \[page 9\]](#).
  - Select the *Payment Method*
  - Select the payment plan validity dates
  - Select the *Sales Document Type* - Only if you want to restrict the usage
4. In the *Item* section:  
Click the *Create* option to add payment plan items. Maintain the following details:
  - *Fund Category*
  - *Fund Code* - Each *Fund Category* has its subset of fund codes
  - *Payment Ratio* or *Default Amount* - If you maintain the payment ratio, the payment ratios of all items must sum up to 100.
  - *Due Date*
  - *Bank Loan* indicator
5. Save your entries and click the *Release* option to release the payment plan.

#### Note

The *Payment Method*, *Fund Category*, and *Fund Code* are configurable. For more information, refer to the Administration Guide.

## 1.4.4.10 Posting Sales Collection to Financial Accounting (FI)

You can create accounting documents for payment transactions from sales documents.

### Procedure

1. Select the [Sales Process Management](#) module and click the [Sales Collection Posting](#) tile.  
The [Sales Collection Posting](#) screen appears.  
Search for the relevant sales documents.

#### i Note

The [Posting Date](#) is defaulted to current date.

The payment items from the sales documents are displayed. The sales documents are locked to avoid transactional change.

2. To post the items, select one or multiple payment items and click the [Post](#) option.  
If a payment transaction was posted to financial accounting earlier, the relevant Financial Accounting (FI) document number is displayed in the [Document Number](#) field.
3. To reverse a posting, select the relevant item that is already posted, and click the [Reverse Post](#) option.  
For related G/L account configuration, refer to the Administration Guide.

## 1.4.5 Price, Discount, and Commission

You maintain price and discount master data for houses. In addition, you maintain commission rules, calculate commission amount, and approve the results.

This application supports the following functions:

- [Maintaining Price Scheme for a House \[page 74\]](#)
- [Maintaining Discount Scheme for a House \[page 76\]](#)
- [Creating Commission Rules \[page 76\]](#)
- [Managing Sales Commissions and Channel Commissions \[page 77\]](#)
- [Managing Special Commission Calculations \[page 78\]](#)
- [Commission Pool Management \[page 79\]](#)

### 1.4.5.1 Maintaining Price Scheme for a House

The Price Scheme application allows you to set up the base price and standard price for a house. The standard price is one that you finally release to the market. The price scheme is defined on a project level.

For each house, you can only maintain one base price. For standard price, create the standard price for the first time, and adjust the standard prices multiple times. Each adjustment creates a record of standard price.

Create the standard price only after the base price is effective. When you adjust the standard price and release it, the old standard price for the same house becomes obsolete.

## Procedure

1. Select the [Price, Discount, and Commission](#) module and click the [Price Scheme](#) tile.  
The [Price Scheme](#) screen appears.
2. To create the **base price**, click the [Create Base Price](#) option.  
The [Pricing Scheme Maintenance](#) screen appears.

### i Note

To create the **standard price**, click the [Create Standard Price](#) option, and follow the same procedure as for base price creation.

To **adjust standard price**, click the [Adjust Standard Price](#) option. On the [Pricing Scheme Maintenance](#) screen, enter the standard price to be adjusted in the [Pre-price Scheme](#) field and follow the same procedure as for the base price creation.

3. In the [Pricing Scheme Header](#) section, maintain the [Scheme Name](#), [Project ID](#), [Property Type](#) (used for restricting the applicable houses), validity dates.
4. In the [Pricing Scheme Details](#) section:
  1. Select the [House Item](#) tab and click the [Select Houses](#) option.
  2. In the [House Resource](#) popup, expand the tree for house selection. Select the houses and click [OK](#).  
Save your entries.

### i Note

Alternatively, you can click the [Download Template](#) option to download a spreadsheet template. Maintain the spreadsheet and click the [Upload Price](#) option to upload the house selection spreadsheet.

5. Select the [Pricing Analysis](#) tab to display an overview of pricing statistics of architectural objects - for example, a project and a phase - that you select in the [Pricing Scheme Header](#) section.
6. Select the [Attachment](#) tab to upload a relevant document.
7. Submit the price scheme for approval. Approval or rejection can be done online or with office automation.

## 1.4.5.2 Maintaining Discount Scheme for a House

The Discount Scheme application allows you to create a discount scheme with discount items that can be applied to pricing. The discount scheme can be defined either globally or on a project level.

### Procedure

1. Select the *Price, Discount, and Commission* module and click the *Discount Scheme* tile.  
The *Discount Scheme* screen appears.
2. Click the *Create* option.  
The *Discount Scheme Maintenance* screen appears.
3. In the *Discount Scheme Header* section, maintain the:
  - *Project ID* and *Discount Scheme Name*
  - *Cross Project* indicator - Indicates whether the discount scheme applies to all projects or only a specific project
  - *Property Type* - Only if the discount scheme is defined on a project level
  - Validity dates
4. In the *Discount Scheme Details* section:
  1. Select the *Discount Details* tab and click the *Create* option to add the discount items.
  2. Maintain the relevant details. If you select the *Discount Type* as **Amount**, enter the *Discount Quantity*. If you select the *Discount Type* as **Ratio**, enter the *Discount Value*.
5. Select the *House Resource* tab if the discount scheme is project-specific.
  1. Click the *Select House* option.
  2. In the *House Resource* popup, expand the tree for house selection. Select the houses and click *OK*.  
Save your entries.
6. In the *Attachment* tab, upload any relevant document.
7. Submit the discount scheme for approval. Approval or rejection can be done online or with office automation.

## 1.4.5.3 Creating Commission Rules

The Commission Rule Management application allows you to create and search commission rules. The logic that determines the commission for a property consultant can differ. You can have different commission calculation rules.

For a project, the calculated value (%) refers to the percentage of the total sale amount that forms the full commission amount. The proportion of the individual commission rule determines how this total commission is divided in percentage between different subcommissions such as sold-out brokerage and full-payment brokerage. The sold-out brokerage corresponds to confirmation of sale and full-payment brokerage corresponds to receiving full-payment of the sale revenue.



## Procedure

1. Select the [Price, Discount, and Commission](#) module and click the [Commission Rule Management](#) tile. The [Commission Rule](#) screen appears.
2. Click the [Create](#) option.

### Note

To edit an existing rule, search for the rule and click the [Brokerage Rule Number](#) hyperlink.

The [Commission Rule Maintenance](#) screen appears.

3. In the [Basic Information](#) section, maintain the required details.
4. In the [Commission Composition](#) section, define a package of commission composition. Click the [Create](#) option to add lines of compositions. Maintain the following information:
  - [Brokerage Classification](#) - You can configure the brokerage classification types. For more information, refer to the Administration Guide.
  - [Proportion](#) - Should sum up to 100 for all packages.
5. In the [Attachment](#) section, upload any relevant document. Save your entries.

## 1.4.5.4 Managing Sales Commissions and Channel Commissions

The Sales Commissions and Channel Commissions application allows you to calculate and view commissions for any contract.

## Procedure

1. Select the [Price, Discount, and Commission](#) module and click the [Sales Commissions and Channel Commissions](#) tile. The [Commission Management](#) screen appears.
2. Search for the relevant project. You can view the commission results.
3. Select the project and click the [Commission Calculation](#) option to calculate commission for the selected project.
4. Click [Save](#) to save the commission calculation as accrual items. The commission details are then available for review by a financial and marketing personnel.

### 1.4.5.4.1 Approving Sales Commissions and Channel Commissions

The Sales Commissions and Channel Commissions Review application allows marketing and financial department personnel to review and approve the commissions.

#### Procedure

1. Select the *Price, Discount, and Commission* module and click the *Sales Commission and Channel Commission Approval* tile.  
The *General Commission Calculation* screen appears.
2. Search and select the relevant commission.
3. Click *Marketing Review* or *Financial Audit* to perform marketing or financial reviews, respectively. The marketing review status or financial audit status for an accrual item is updated as *Approved*.

After review and approval, the calculated commission can be applied to the property consultant through the Commission Pool Management application. For further information, see [Commission Pool Management \[page 79\]](#).

### 1.4.5.5 Managing Special Commission Calculations

The Special Commission Calculation application allows you to calculate and view special commissions for a specific sales team.

#### Procedure

1. Select the *Price, Discount, and Commission* module and click the *Special Commission Calculation* tile.  
The *Special Commission Calculation* screen appears.
2. Search for the relevant project. You can view the commission results.
3. Select the project and click the *Calculate Special Commission* option to calculate commission for the searched project and the sales team.
4. Click *Save* to save the commission calculation. The commission details are then available for review by a financial and marketing personnel.

## 1.4.5.5.1 Approving Special Commissions

The Special Commission Approval application allows marketing and financial department personnel to review and approve the commissions.

### Procedure

1. Select the *Price, Discount, and Commission* module and click the *Special Commission Approval* tile. The *Special Commission Approval* screen appears.
2. Search and select the relevant commission.
3. Click *Marketing Review* or *Financial Audit* to perform marketing or financial reviews, respectively. The marketing review status or financial audit status for an accrual item is updated as *Approved*.

After review and approval, the calculated commission can be applied to the property consultant through the Commission Pool Management application. See [Commission Pool Management \[page 79\]](#).

## 1.4.5.6 Commission Pool Management

The Commission Pool Management application allows you to manage sales commissions for a property consultant.

### Procedure

1. Select the *Price, Discount, and Commission* module and click the *Commission Pool Management* tile. The *Commission Pool Management* screen appears.
2. Search for the required commissions.
3. To view details such as status for a commission, click the *Details* hyperlink under *Apply for Payment Details* column.  
On the *Issue Details* popup window, you can review or invalidate the commission.
4. To initiate payment for a specific commission, select a commission and click *Apply for Commission*.
5. To adjust a commission, select the commission and click the *Adjust Commission* option. In the *Commission Adjustment* popup, enter the adjustment details. Each adjustment is saved with an adjustment number.

## 1.4.6 Sales Plan

You manage sales target values by maintaining sales plan.

This application supports the following functions:

- [Managing Full Cycle Sales Plan \[page 80\]](#)

- [Managing Annual / Quarterly Sales Plan \[page 80\]](#)
- [Managing Monthly Sales Plan \[page 81\]](#)
- [Releasing Monthly Sales Targets \[page 81\]](#)

## 1.4.6.1 Managing Full Cycle Sales Plan

The Full Cycle Sales Plan application captures the sales target for the entire project cycle. For example, it specifies the target number of housing units that can be sold and the amount.

### Procedure

1. Select the [Sales Plan](#) module and click the [Full Cycle Sales Plan](#) tile.  
The [Full Cycle Sales Plan](#) screen appears.
2. Search any existing full cycle sales plan and click the [Sales Plan Number](#) hyperlink to open the details page.
3. To create a new full cycle sales plan, go back to the [Full Cycle Sales Plan](#) screen and click the [New](#) option.
4. In the [Sales Plan Header](#) section, provide the key sales plan attributes such as the [Sales Plan Name](#), category, project name, phase, and so on.
5. In the [Details](#) section, specify the sales target amount for a combination of project, phase, property type, and so on.

## 1.4.6.2 Managing Annual / Quarterly Sales Plan

The Annual / Quarterly Sales Plan application covers the sales plan for the whole year or a specific quarter.

### Procedure

1. Select the [Sales Plan](#) module and click the [Annual / Quarterly Sales Plan](#) tile.  
The [Annual / Quarterly Sales Plan](#) screen appears.
2. Search any existing sales plan and click the [Sales Plan Number](#) hyperlink to open the details page.

#### i Note

The [Category](#) field specifies the duration of a sales plan.

3. To create a sales plan, go back to the [Annual / Quarterly Sales Plan](#) screen and click the [New](#) option.
4. In the [Sales Plan Header](#) section, provide the key sales plan attributes such as the [Sales Plan Name](#), [Category](#), [Organization Code](#), and [Year](#).
5. In the [Sales Plan Details](#) section, you can create or delete project-level sales plans. Click [Summary Preview](#) to view summary of all project sales plans.

### 1.4.6.3 Managing Monthly Sales Plan

The Monthly Sales Plan application covers the sales plan for the period of a month.

#### Procedure

1. Select the [Sales Plan](#) module and click the [Monthly Sales Plan](#) tile.  
The [Monthly Sales Plan](#) screen appears.
2. Search any existing sales plan and click the [Sales Plan Number](#) hyperlink to open the details page.
3. To create a sales plan, go back to the [Monthly Sales Plan](#) screen and click the [New](#) option.
4. In the [Monthly Sales Plan Header](#) section, provide the key sales plan attributes such as the [Sales Plan Name](#), [Year](#), [Month](#), [Week](#), and [OrganizationCode](#).
5. In the [Monthly Sales Plan Details](#) section, you can create or delete project-level sales plans. Click [Plan Summary Preview](#) to view summary of all project sales plans.

### 1.4.6.4 Releasing Monthly Sales Targets

The Monthly Sales Target application allows you to release the monthly sales plans.

#### Procedure

1. Select the [Sales Plan](#) module and click the [Monthly Sales Target](#) tile.  
The [Monthly Sales Target](#) screen appears.
2. Search already issued monthly sales target and click the [New](#) option to issue a new monthly sales target.
3. In the [Monthly Sales Target Header](#) section, enter the year and month.  
In the [Monthly Sales Target Details](#) section, click the [Select Project](#) option to select the monthly plan that you have maintained.
4. Click the [Save](#) option to release the monthly sales targets.

### 1.4.7 Marketing and Sales Cost Management

You can manage marketing and sales cost for campaigns, events, advertisements, gifts, and so on.

You can plan your cost and manage the cost in association with cost and contract management (CCM) module. For further information, see [Cost and Contract Management \[page 22\]](#).

This application supports the following functions:

- [Managing Market Cost Contract \[page 82\]](#)
- [Managing Annual/Quarterly Sales Plan and Market Budget \[page 82\]](#)

- [Managing Monthly Marketing Expense Plan \[page 83\]](#)
- [Managing an Invoice \[page 83\]](#)
- [Managing a Payment Request \[page 83\]](#)
- [Creating a Bidding \[page 84\]](#)

### 1.4.7.1 Managing Market Cost Contract

The Market Cost Contract Management application allows you to create and manage contracts between the real estate organization and the marketing or advertising vendor.

#### Procedure

1. Select the *Marketing and Sales Cost Management* module and click the *Market Cost Contract Management* tile.  
The *Search Contract* screen appears.
2. Search an existing contract or non-contract, and click the *Contract System No.* hyperlink to view and edit the contract details.

#### **i** Note

For details on creating contracts, see [Creating a Contract, Supplement Contract or Non-Contract \[page 29\]](#).

### 1.4.7.2 Managing Annual/Quarterly Sales Plan and Market Budget

The Annual or Quarterly Sales Plan and Market Budget application provides complete details of the target marketing expense plans.

#### Procedure

1. Select the *Marketing and Sales Cost Management* module and click the *Annual/Quarterly Sales Plan and Market Budget* tile.  
The *Annual/Quarterly Sales Plan and Market Budget* screen appears.
2. Click the *Create* option.  
The *Annual/Quarterly Sales Plan and Market Budget Maintenance* screen appears.
3. In the *Market Budget Header* section, enter the relevant details.
4. In the *Item* section, select *Create* to create marketing expense-related items.
5. In the *Budget Details* section, you can view the budget details for the selected item.

The *First Level Subjects* and *Second Level Subjects* depend on the cost account and are taken automatically from there. For further information, see [Cost Account \[page 22\]](#).

You can enter the monthly budgets.

6. In the *Attachment* section, upload any relevant files.
7. You can perform a recheck, preview the summary, or give a summary approval. Save your entries.

### 1.4.7.3 Managing Monthly Marketing Expense Plan

The Marketing Expenses Monthly Plan application provides the details of the target marketing expense plans.

#### Procedure

1. Select the *Marketing and Sales Cost Management* module and click the *Marketing Expense - Monthly Plan* tile.  
The *Marketing Expenses - Monthly Plan* screen appears.
2. Click the *Create* option.  
The *Marketing Expenses - Monthly Plan Maintenance* screen appears.
3. In the *Monthly Plan Header* section, enter the relevant details.
4. In the *Monthly Plan Details* section, click the *Create* option to create split marketing expense items.
5. To view the *Historical Plan Details* or perform a *Single-Step Approval*, click the corresponding options. Save your entries.

### 1.4.7.4 Managing an Invoice

The Invoice Management application is used to create invoices used throughout the project.

To create an invoice, select the *Marketing and Sales Cost Management* module and click the *Invoice Management* tile. For further details, see:

- [Invoice and Payment Request Management \[page 39\]](#)
- [Creating an Invoice \[page 39\]](#)

### 1.4.7.5 Managing a Payment Request

The Payment Request application is used to create payment requests based on the invoices.

To set up a payment request, select the *Marketing and Sales Cost Management* module and click the *Payment Request* tile. For further details, see:

- [Invoice and Payment Request Management \[page 39\]](#)
- [Setting Up a Payment Request \[page 40\]](#)

## 1.4.7.6 Creating a Bidding

Bidding process is used to create a marketing event.

To create a bidding, select the *Marketing and Sales Cost Management* module and click the *Bidding Management* tile. For further details, see:

- [Bidding Process \[page 53\]](#)
- [Creating a Bidding Process \[page 54\]](#)





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