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8 RE  Real Estate Management

8.1 Migration from Classic RE to RE-FX (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can migrate your Classic RE data to Flexible Real Estate Management (RE-FX). You can use transaction REMICL to navigate to the tables in the Implementation Guide that need to be processed, and to check the status of the migration.

See also

For more information, see SAP Notes 828160 and 865444.

8.2 RE-CO  Real Estate Controlling

8.2.1 RE-CO-AA  Activity Allocation

8.2.1.1 Indirect Activity Allocation with RE Objects as Receivers (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), a real estate object can now be the receiver of an indirect activity allocation for actual values. This applies to the following objects:
- Business entity
- Building
- Land
- Settlement unit

Indirect activity allocation is similar to apportionment. Using indirect activity allocation you can automatically settle activities based on different keys (actual values, statistical key figures, fixed shares, and so on). In addition, the system can determine the activity quantity of a sender from the activity input of the receiver.

You use real estate sets to group together the real estate objects that are the receivers of the distribution.
Effects on Customizing

Make the necessary settings in Customizing for *Flexible Real Estate Management*. Choose *Indirect Activity Allocation* -> Create Indirect Activity Allocation.

See also

For more information, refer to the *SAP Library*.

Choose *Financials* -> *Flexible Real Estate Management (RE-FX)* --&gt; *Commercial Real Estate Management* --&gt; *Controlling* --&gt; *Actual Postings for Real Estate Objects*. Also see *Tools* --&gt; *Real Estate Sets*.

8.3 RE-FX  Flexible Real Estate Management

8.3.1 Switzerland: Correspondence (New)

Use

As of *SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600)*, new correspondence functions for Switzerland are available in *Flexible Real Estate Management (RE-FX)*. In Switzerland, the required correspondence is in part governed by tenancy law. To help you create the legally required documents, these letters are now available in the standard system. The following correspondence activities are available for Switzerland:

- Rent change form (must be approved by canton)
- Notice form (must be approved by canton)
- Heating/service charge settlement form (heating costs statement)
- Sales-based rent
- Invoice printing
- Dunning (different dunning texts for each process)

Effects on Customizing

Make the required settings in Customizing for *Flexible Real Estate Management* in these IMG activities:

- Settings for correspondence in standard system:
  - Define Correspondence Activities
- Define Correspondence Applications and Assign Correspondence Activities
- Country-Specific Settings:
  - Activate Country-Specifics
- Settings for correspondence in Switzerland:
  - Enter Dunning Area per Process

See also
For more information, refer to the SAP Library.
Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Switzerland.

8.3.2 RE-FX-BD  Basic Data

8.3.2.1 BADIs in Flexible Real Estate Management (Changed)

Use
As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), new Business Add-Ins (BADIs) are available. For more information see the Release Information for BADI technology.

The following BADIs are available in Flexible Real Estate Management:
BADI_REAL_ADJUSTMENT_TASK:  Adjustment Measure
BADI_REAL_COMPARE_GRP:  Comparative Apartments
BADI_REAL_PARCEL_OF_LAND:  Parcel
BADI_REAL_NUMBER_PLNO:  Conversion Exits for Parcel Number
BADI_REAL_LAND_REGISTER:  Land Register:
BADI_REAL_NUMBER_PAGENO:  Conversion Exits for Page Number of Land Register
BADI_REAL_NUMBER_REGNO:  Conversion Exits for Numbers in Real Estate Register
BADI_REAL_NUMBER_SECNO:  Conversion Exits for Numbers in Section II and III
BADI_REAL_NOTICE_ASSESSMENT:  Notice of Assessment
BADI_REAL_PUBLIC_ENCUMBRANCE:  Other Public Registers
BADI_REAL_RECORD_CHANGE:  Parcel Update
BADI_REAL_JOINT_LIABILITY:  Joint Liability
BADI_REAL_MANDATE:  Mandate
BADI_REAL_OFFER_OBJECT:  Offered Object
BADI_REAL_RENTAL_REQUEST:  RE SearchRequest
BADI_REAL_OFFER:  Contract Offer
BADI_REAL_SEARCH:  BADI Real Estate Search
See also
For more information, see Documentation for SAP Netweaver.

8.3.2.2 Master Data (Changed)

Use
As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can enter infrastructure characteristics for your master data, for example, how far a real estate object is from the nearest bus stop. You can then select using the infrastructure characteristics both in the real estate search and in land use management (LUM).

In addition, all master data of RE-FX is now integrated with the SAP search engine, TREX. For more information, see Release Information for TREX Search.

In addition, you can modify the display of the RE Navigator and navigation within the RE Navigator to suit your needs. To do so:

Choose Extras -> Settings to make general navigation settings (for example, which object entries are available in the dropdown box).

Choose @LZ@ with the quick info text Layout in the browser menu to specify which hierarchy levels and filters are available in the navigation area on the left side of the screen.

Effects on Customizing
Make the necessary settings for infrastructure characteristics in Customizing in the IMG activities under Master Data:

- Define Infrastructure Characteristics
- Specify Basis for Measuring Distance as Time

8.3.3 RE-FX-OR Offer and Rental Request

8.3.3.1 Master Data (Changed)

Use
As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can enter infrastructure characteristics for you master data, for example, how far a real estate object is from the nearest bus stop. You can then select using the infrastructure characteristics both in the real estate search and in land use management (LUM).

In addition, all master data of RE-FX is now integrated with the SAP search engine, TREX. For more information, see Release Information for TREX Search.

In addition, you can modify the display of the RE Navigator and navigation within the RE Navigator to suit your needs. To do so:

Choose Extras -> Settings to make general navigation settings (for example, which object entries are available in the dropdown box).

Choose @LZ@ with the quick info text Layout in the browser menu to specify which hierarchy levels and filters are available in the navigation area on the left side of the screen.

**Effects on Customizing**

Make the necessary settings for infrastructure characteristics in Customizing in the IMG activities under Master Data:

- Define Infrastructure Characteristics
- Specify Basis for Measuring Distance as Time

**8.3.3.2 Business Partner - Customer/Vendor Integration (Changed)**

**Use**

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), the link between business partners in customer and vendor roles is represented differently in the system from a technical perspective. The customer/vendor integration of the business partner is now part of a cross-application component, Master Data Synchronization. For more information, see these central Release Infos:

- Customer/Vendor Integration
- Interface Changes for SAP Business Partner
- Master Data Synchronization
Effects on Customizing

For all customer and vendor roles, check that the mandatory fields of the account groups for the customer or vendor are set up as required entry fields. Note:

- Problems can arise when you create a partner, if a field, which is set up as a required entry field in the customer/vendor, does not receive a value (field is empty). If this occurs, depending on the settings of the PPO (Postprocessing Office), the system either generates a short dump, or it does not create the customer/vendor (without issuing any message to that effect). In this case, you can use the transactions of area menu /SAPPO/ to help locate the error.

- To avoid these errors, you have to set up all fields, which are mandatory on the customer/vendor, as required entry fields in the associated business partner roles. This applies especially to the language for correspondence (which is mandatory in the customer/vendor regardless of Customizing) and the reconciliation account.

Make the necessary settings in the Configure Field Attributes per BP Role IMG activity. The correspondence language for persons is in the Central Data dataset; the correspondence language for organizations is in the address dataset under Address: Language Key (Communication).

For additional settings that are useful in the RE context, see SAP Note 882801.

8.3.3.3 Real Estate Search (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use the real estate search in Flexible Real Estate Management (RE-FX). (In Classic RE, the function similar to this was called Management of Interested Parties). The following functions are available in this component:

- Create RE search requests
- Automatically copy rental objects to offered objects
- Search for the offered objects that meet the criteria of an RE search request
- Search for the RE search requests that meet the criteria of an offered object

You can search, for example, using these criteria:

- Location and address
- Size and price
- Fixtures and fittings characteristics
- Infrastructure characteristics (see Release Info for Master Data)

- Create and process a contract offer for a rental object
- Create a real estate contract from the contract offer
**Effects on Customizing**

Make the necessary Customizing settings in the IMG activities under Real Estate Search.

**See also**

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Real Estate Search.

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### 8.3.4 RE-FX-BP Business Partner

#### 8.3.4.1 Business Partner - Customer/Vendor Integration (Changed)

**Use**

As of *SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600)*, the link between business partners in customer and vendor roles is represented differently in the system from a technical perspective. The customer/vendor integration of the business partner is now part of a cross-application component, *Master Data Synchronization*. For more information, see these central Release Infos:

- Customer/Vendor Integration
- Interface Changes for SAP Business Partner
- Master Data Synchronization

---

**Effects on Customizing**

For all customer and vendor roles, check that the mandatory fields of the account groups for the customer or vendor are set up as required entry fields. Note:

- Problems can arise when you create a partner, if a field, which is set up as a required entry field in the customer/vendor, does not receive a value (field is empty). If this occurs, depending on the settings of the PPO (Postprocessing Office), the system either generates a short dump, or it does not create the customer/vendor (without issuing any message to that effect). In this case, you can use the transactions of area menu /SAPPO/ to help locate the error.

- To avoid these errors, you have to set up all fields, which are mandatory on the customer/vendor, as required entry fields in the associated business partner roles. This applies especially to the language for correspondence (which is mandatory in the customer/vendor regardless of Customizing) and the reconciliation account.
Make the necessary settings in the Configure Field Attributes per BP Role IMG activity. The correspondence language for persons is in the Central Data dataset; the correspondence language for organizations is in the address dataset under Address: Language Key (Communication).

For additional settings that are useful in the RE context, see SAP Note 882801.

8.3.5 RE-FX-RA Rental Accounting

8.3.5.1 Integration of RE-FX with Public Sector Contract Accounts Receivable a Payable (New)

Use

Flexible Real Estate Management (RE-FX)

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600) and Extension Public Services 6.0 (EA-PS 600), if the business function set Public Services (EA-PS) is active in your client, then you can also use the integrated functions of the Public Sector Contract Accounts Receivable and Payable (PS-CD) component. You can activate this accounting system per company code for the integration with RE-FX. By doing so, you can benefit from a unified open item accounting in Public Sector with RE-specific processes, while being able to transfer these documents to General Ledger Accounting.

- **Contract integration:**
  The Real Estate contract is directly linked to the business function set Public Services. The different contracts, that is, the Real Estate contract and the contract object are differentiated by the new Subapplication indicator in the account assignment.

- **Integration with partner management**
  Business partners with the internal role MKK can now be assigned to a real estate contract.

- **Integration of contract account**
  Depending on the contract type, you can assign existing contract accounts to the Real Estate contract, or you can create a new contract account.

- **Posting parameters of the Real Estate contract**
  - The following account assignment objects for Funds Management (PSM-FM) were added to the Organizational Assignment posting term:
    
    | Object                | Description         |
    |-----------------------|---------------------|
    | FUND                  | Fund                |
    | FUNDSCENTER           | Funds Center        |
    | COMMITMENTITEM        | Commitment Item     |
    | FUNCTIONALAREA        | Functional Area     |
    | GRANTNUMBER           | Grant               |
    | MEASURE               | Measure             |

  - In the Postings posting term, you can enter parameters specifically for payment and dunning.
The input help provides default values for these fields for each accounting system.

Note:
Not all processes of Flexible Real Estate Management are supported by the Public Sector Contract Accounting component. The following processes are not supported:
- Processes of service charge settlement and sales-based rent settlement, when settlement is made using the actual principle, and advance payments that are posted using special G/L transactions
- Processes of condominium owners association (COA) management and one-time postings for COA management

Effects on Customizing

Make the following settings in Customizing:
- You can activate the Business Function Set Public Services in the Activation Switch for SAP ECC Extensions IMG activity. Within these Business Function Sets you also have to activate the extensions EA-FIN and EA-PS.
- In the Make Basic Settings in Company Code IMG activity, specify the accounting system you want to use for each company code.
- Integration of Contract Accounts Receivable and Payable
  Here you specify the contract account category for the FI-CA account dependent on the contract type. If the Assign Existing Contract Account indicator is set, then you can only assign contract accounts of this category when processing the Real Estate contract. If that indicator is not set, the system automatically creates a new contract account with the contract account category that was entered.
- Assignment of Main Transaction/Subtransaction to Transaction Type
  Here you specify whether the account determination of RE-FX is used for the document type and business transaction (see main transaction and subtransaction).

See also

For more information, see the release information for
Public Sector Contract Accounts Receivable and Payable.

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) --> Commercial Real Estate Management --> Accounting (RE-FX)
8.3.5.2 One-Time Postings (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use the one-time postings function to post documents in Financial Accounting (FI) that are related to data of Flexible Real Estate Management (RE-FX).

The data entry screens for one-time postings are considerably simplified, as compared to the normal FI interface, so that they are better adapted to the needs of real estate management.

To use one-time postings, you first have to define posting activities in Customizing. Then in the application, you enter the posting activity and the company code. Based on the settings made in Customizing for the posting activity, the system creates one or more documents that you can then only add to and modify (for example, by entering the invoice amount or the concrete real estate object).

You can use one-time postings, for example, for the following postings:
- Posting of vendor invoices with reference to real estate objects
- Posting of vendor invoices and clearing to contract partners with customer account
- Posting of one-time receivables for contract partner with customer account
- Posting costs of a condominium owners association COA

Effects on Customizing

Make the necessary settings in Customizing for Flexible Real Estate Management in all sections under One-Time Postings.

See also

For more information, refer to the SAP Library.


8.3.5.3 Tax Summarization for FI Documents (New)

Use

In certain countries (such as Austria and Italy) the law requires the summarization of tax lines.

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600) you can summarize tax lines in a company code.
The system groups line items together based on the following criteria:
- Underlying tax code
- Tax category of the account (G/L account or reconciliation account)
- Tax jurisdiction code (if there is one)
- Account type
- Gross/net indicator of condition
- Currency

A summation tax line is generated for each of these summarized lines. The system displays tax lines on G/L accounts and subledger accounts separately.

**Effects on Customizing**

Make the necessary settings in Customizing for *Flexible Real Estate Management* in the Accounting section under Activate Document or Tax Summarization in Company Code

**See also**

For more information on rounding differences and on balancing debit and credit amounts related to taxes, see Activation of Tax Summarization.

For more information, refer to the SAP Library.

Choose *Financials* -> *Flexible Real Estate Management (RE-FX)* --> *Accounting* --> *Periodic Posting: Contracts*.

**8.3.5.4 Withholding Tax in RE Posting Processes (New)**

**Use**

As of *SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600)*, you can post conditions with withholding tax using RE posting processes.

Conditions with withholding tax data can be processed in these processes:
- Periodic posting
- One-time postings
- Service charge settlement
- Sales-based rent settlement
Effects on Customizing

This is a general function of Financial Accounting (FI). To make postings with extended withholding tax, you have to have made the following settings in Customizing for Financial Accounting (New):

- You activated extended withholding tax in your company code.
- In the country of the company code, you created withholding tax types and the necessary withholding tax codes. The withholding tax type describes the type of withholding tax and the time of posting. The withholding tax code contains the tax rate. You need types that are related to payment (withholding tax is not due until payment is made) and types relevant to invoices (withholding tax is already due when the invoice is received). Choose the IMG activities under Withholding Tax Type and Withholding Tax Codes.
- Assign the withholding tax types to the company code.

Effects on System Administration

Constraints:

If you made settings for a payment-relevant withholding tax type in Customizing, then the withholding tax is only posted during payment-relevant processes, but not during processes that are for clearing only.

Withholding tax is not posted for installment payments.

During service charge settlement, only advance payments posted as revenue are considered for the conditions relevant for service charges. The system does not support special general ledger processes with withholding tax. The standard withholding tax term is used during service charge settlement. You can use a different withholding tax term from the conditions only in the Transfer Posting Advance Payments Debit Balance settlement mode.

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Commercial Real Estate Management -> Accounting (RE-FX) -> Postings with Extended Withholding Tax.

For more information, see SAP Note 429979.

8.3.6 RE-FX-SC Service Charge Settlement

8.3.6.1 Surcharge/Apportionment Loss Risk (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can calculate surcharges in service charge settlement and add them to the results of the settlement. You can use this procedure, for example, for apportionment loss risk in Germany. To do so, you define a surcharge schema. The surcharge schema determines how high the surcharge percentage is, while allowing you to have different
surcharges for different service charge keys, usage types and contract types.
You specify the surcharge schema that is used during settlement in the Define Settlement Parameters IMG activity.

**Country Specifics for Switzerland:**
In Switzerland, the surcharge schema can be used to handle the management costs surcharge. This surcharge is calculated for all rental objects. The amount of the surcharge varies depending on whether the contract is internal or external.

You can also specify how the system distributes any differences that arise due to rounding (during distribution of costs from the settlement units to rental objects).

**Effects on Customizing**
Make the following settings for surcharges in Customizing for *Flexible Real Estate Management*:
- Define Calculation of Surcharges.
- Then, in the Define Settlement Parameters IMG activity, specify which surcharge schema is used for settlement.

**Additional Changes in IMG Activities of SCS:**
- You can now specify when settlement parameters are active. For example, you can decide if they should be active only for COA settlement. In addition, you can decide how any remaining amounts on the settlement unit are distributed.
- You can also specify the settlement processes for which settlement units with a certain service charge key are taken into account. You make these settings in the Define Service Charge Keys IMG activity.

**See also**
For more information, refer to the *SAP Library*.
Choose Financials -> Flexible Real Estate Management (RE-FX) -> Service Charge Settlement

### 8.3.7 RE-FX-AJ Rent Adjustment

#### 8.3.7.1 Rent Adjustment Using Adjustment Measure/Modernization (New)

**Use**
As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use a new adjustment method for adjustment of conditions. For the Adjustment Measure method, SAP provides two types:
- Modernization
Expert opinion

You can use an adjustment of conditions to distribute the costs of a modernization measure. According to German law, the amount distributed to the condition for rent is not allowed to exceed a certain percentage of the total costs for the object. You create adjustment measures in the RE Navigator. You enter the costs involved and assign the real estate objects to the adjustment measure. The system multiplies the total costs by the percentage rate defined by law. The amount determined is distributed to the rental objects or contracts based on a measurement amount.

You can limit the rent adjustment, if you choose to voluntarily forego a portion of the increase. To do so, you define caps and limits on the adjustment amount. If the adjustment amount exceeds the limits you set, then the system can create a statistical waiver condition for the rental objects or contracts.

Effects on Customizing

In Customizing for Flexible Real Estate Management, you need to make the following settings under Adjustment of Conditions (Rent Adjustment).

New IMG activities:

Make all necessary settings in the IMG activities under Adjustment Measure (Such as Modernization, Expert Opinion).

Other enhanced IMG activities:

- Define Adjustment Rules
  Here you can specify, in the Control in Contract/Rental Object Dialog group box, if the system automatically defaults the adjustment rule for a condition, or if you manually assign the adjustment rule to the condition.

- Define Adjustment Parameters (Capping Provisions) Dependent on Term
  Here you can set absolute limits for capping provisions.

- Define Rounding, Change Reason and Increases per Adjustment Rule
  Here you can enter the condition purpose, per adjustment rule and condition type, for new conditions. The condition purpose is particularly important for waiver conditions, since they should have a statistical condition purpose (showing the rent increase that was waived in reporting and correspondence).

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Adjustment of Conditions (Rent Adjustment) -> Adjustment Method: Adjustment Measure.
8.3.8 RE-FX-CP  Correspondence

8.3.8.1 Correspondence (Changed)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use PDF-based forms in Flexible Real Estate Management (RE-FX). PDF-based forms are the type of form now recommended. They replace the functions previously covered by SAP Smart Forms, which were used up to now.

- If you already use your own Smart Forms created in earlier releases, you can continue to use these Smart Forms without making any changes to them. As of SAP ECC 6.00, development is not continuing for the sample forms for SAP Smart Forms, which were provided in Flexible Real Estate Management.
- New sample forms are provided only as PDF-based forms.
- If you want to set up new forms, use PDF-based forms. To do so, you assign your form the new PDF-Based Forms form type.

There are some limitations that you should expect if you use PDF-based forms in RE-FX in this release. For more information see SAP Note 766410.

The following new forms are available as PDF-based forms:
- Forms for contract offer
- Form for the lease abstract for the offered object
- Forms for land use management: master data summaries
  You have to make settings in Customizing to be able to use these forms.

There is also a new field you can use to define a reference to a graphic so that it can be used in your form. This reference is dependent on the company code. You define this reference in the Define Company-Code-Dependent Text Modules IMG activity.

If you want to change the technical parameters for the output of forms (such as, XML output), you can use the new methods of the BAdI RECP_SF.

In addition, there is a new Overview of Created Documents function in the correspondence menu. Using this function, you can display documents that were printed or archived. You can navigate from the list to the master data and to the correspondence log.

The following documents are not displayed in the overview:
- Documents that were displayed in page preview, but were not printed
- Documents that were not archived
- Microsoft Office documents (document storage is used for these documents)

You can call this function in:
- The Correspondence menu and Information System menu
- The RE Navigator when processing a real estate object. Choose the Overviews tab page and then the Created Documents list.
- All selection screens of mass print programs. Choose *Documents of Your Last Print Run* and *Overview of Created Documents* in relation to the given correspondence application of the mass print program.

**Effects on Customizing**

To set up new forms, make the necessary settings in Customizing for correspondence:

- Define Forms
- Form Builder for PDF-Based Forms
- Define Correspondence Activities
- Define Correspondence Applications and Assign Correspondence Activities

**8.3.9 RE-FX-IT**

**Input Tax Treatment**

**8.3.9.1 Input Tax Distribution (Changed)**

**Use**

As of *SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600)*, you can execute input tax distribution for costs related to real estate that do **not** have direct account assignment to the real estate object, but where the costs are instead assigned to other objects, if these other objects (such as, functional location or CO order) can be linked to real estate objects. For example, maintenance orders are usually linked to the real estate object by means of the functional location assigned to it. Internal orders and projects can be assigned directly to a real estate object.

When you execute input tax distribution for costs related to real estate on these objects, the same rules apply as for real estate objects themselves. You enter an option rate method on the assigned real estate object. The system uses this option rate method to determine the option rates.

**Effects on Customizing**

Make the required settings in Customizing for *Flexible Real Estate Management* in these IMG activities:
- Make Basic Settings in Company Code
  If the company code opts, then you can make the following settings here: the object types, for which input tax distribution is performed, and which message types are output when the system is not able to find an assigned real estate object.
- Assign Functional Locations/Fixed Assets/Projects/CO Orders
  Here you specify which objects can be assigned to other object types.

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) --> Commercial Real Estate Management --> Option Rate Determination and Input Tax Distribution.

8.3.10 RE-FX-MM Third Party Management/COA

8.3.10.1 Third Party Management: Mandates and Management of Condominiums (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use third-party management in Flexible Real Estate Management (RE-FX). Third-party management applies when a real estate manager manages objects that are owned by others. The real estate manager receives the mandate of the actual owner, providing the legal basis for the manager to manage the owner's property. Each mandate that is granted by an owner has its own dependent real estate objects and processes. These are represented in the system in a separate company code for each mandate. The mandate company code thereby provides the basis for separation of assets between the owner and the manager, and supports the creation of separate financial statements. The COA mandate is a special form of mandate.

The following functions are available in third-party management:
- Master data of the mandate
- Automatic creation of the mandate company code
- Master data of real estate objects belonging to third parties, with the special case of objects belonging to a condominium owners' association (COA)
- Accounting for condominium owners, as well as for the condominium owners' association as a whole (with separation of assets)
- COA settlement
- Create annual budget
- Special assessment using adjustment (see Release Info for Adjustment Measure).
Effects on Customizing

Then make the necessary settings in Customizing for Flexible Real Estate Management.

- General settings:
  - Make Basic Settings in Company Code
    Set the indicators for manager company codes, and for the reference company codes you want to use as templates for creating an object company code or COA company code. Also designate the company code in which you want to manage rentals for rented condominiums belonging to another owner.
  - Settings in all IMG activities under Third Party Management:

- Settings under Service Charge Settlement:
  - Specify when settlement parameters are active. For example, decide if they should only be active for COA settlement.
  - In the Define Service Charge Keys IMG activity, specify the settlement processes for which settlement units with a certain service charge key are taken into account.

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) Commercial Real Estate Management -> Third-Party Management

8.3.11 RE-FX-LM Land Use Management

8.3.11.1 Master Data (Changed)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can enter infrastructure characteristics for your master data, for example, how far a real estate object is from the nearest bus stop. You can then select using the infrastructure characteristics both in the real estate search and in land use management (LUM).

In addition, all master data of RE-FX is now integrated with the SAP search engine, TREX. For more information, see Release Information for TREX Search.

In addition, you can modify the display of the RE Navigator and navigation within the RE Navigator to suit your needs. To do so:

Choose Extras -> Settings to make general navigation settings (for example, which object entries are
available in the dropdown box).
Choose @LZ@ with the quick info text Layout in the browser menu to specify which hierarchy levels and filters are available in the navigation area on the left side of the screen.

Effects on Customizing
Make the necessary settings for infrastructure characteristics in Customizing in the IMG activities under Master Data:
- Define Infrastructure Characteristics
- Specify Basis for Measuring Distance as Time

8.3.11.2 Land Use Management (New)

Use
As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use Land Use Management (LUM) in Flexible Real Estate Management (RE-FX). This is currently a country-specific development for Germany.

Land use management supports you in the following processes:
- Detailed recordkeeping on land and similar rights
- Recording of ownership and possession
- Management of changes in holdings and the contracts affecting holdings
- Documenting limitations and benefits related to possession and usage attached to parcels, such as
  - Encumbrances and restrictions entered in the land register, including liens
  - Easements, site protections, site contamination, and other similar information recorded in other public registers
  - Management of right of use contracts and contracts for land lease (hereditary by German law) and for protection of rights of third parties on your own real estate, or your own rights on real estate of a third party

The following new master data objects are now in the RE-Navigator (RE80):
- Parcel
- Land register
- Other public registers
Parcel updates
- Notice of assessment

Land use management is integrated with the following components:
- The valuation of land for accounting purposes takes place in Asset Accounting (FI-AA).
- For property taxes and fees, right of use contracts and land lease contracts, there is an integration with Financial Accounting (FI) and Controlling (CO).

For information on using infrastructure characteristics for your master data, refer to the Release Information on Master Data.

Effects on Customizing

Make the necessary setting in Customizing for Flexible Real Estate Management. Choose Country-Specific Settings - Germany - Land Use Management.

Also make your settings in the following IMG activities:
- Define Measurement Types
- Define Contract Types

See also

For more information, refer to the SAP Library.

Choose Financials - Flexible Real Estate Management (RE-FX) - Country Specifics - Germany - Land Use Management

8.3.12 RE-FX-IS Information System

8.3.12.1 Data Retention Tool for RE-FX (New)

Use

The Data Retention Tool (DART), supports the user with reporting needed to meet legal requirements related to external audits. Using this tool, you can extract master data and transaction data to sequential files and display the data. The data export makes it possible for the data to be analyzed using external software.

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use DART to extract RE-specific data to accounting documents.

To access the different transactions for extracting and displaying data in DART, in the SAP Easy Access screen, choose Tools - Administration - Administration - Data Retention Tool.
Effects on System Administration

If the Real Estate Management field does not appear in the DART transactions in the Transaction data group box, you have to activate it. Choose Tools -> Administration -> Administration -> Data Retention Tool -> Configuration -> Data Extracts.

See also

For more information on DART, see SAP Note 702511.

8.3.12.2 Document Management System (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use the document management (DMS) application component.

Effects on Customizing

Make the necessary settings in Customizing for Flexible Real Estate Management. Choose Document Management.

See also

For more information, see the Implementation Guide. Choose Document Management.

8.3.12.3 Information System (Changed)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), the following new reports are available in the menu for the Information System of Flexible Real Estate Management.

Accounting reports

- Cash flow
  
  You can use this report to display the cash flows that belong to contracts.

Controlling reports on costs and revenues
8.3.13 RE-FX-MI  Migration

8.3.13.1 Migration from Classic RE to RE-FX (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can migrate your Classic RE data to Flexible Real Estate Management (RE-FX). You can use transaction REMICL to navigate to the tables in the Implementation Guide that need to be processed, and to check the status of the migration.

See also

For more information, see SAP Notes 828160 and 865444.

8.3.14 RE-FX-LC  Real Estate Localization

8.3.14.1 Localizations for Austria, Switzerland and Italy (New)
Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use country-specific functions in Flexible Real Estate Management (RE-FX). For detailed information, see the release information for the specific country:

- **Switzerland:**
  - Rent Adjustment Based on Swiss Law
  - Enhancements to Heating and Service Charge Settlement
  - Lease-In with ISR Reference
  - Accounting
  - Correspondence

- Austria
- Italy

For information on how to use tax summarization to meet legal requirements in Austria and Italy, see the release information on tax summarization.

Effects on Customizing

Make the necessary settings in Customizing for Flexible Real Estate Management in the section for your country. Activate the Country-Specifics for your country. This activation is the prerequisite for making all other settings in the given country-specific part of the Implementation Guide.

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics.

8.3.14.2 RE-FX-LC-CH  Real Estate Localization Switzerland

8.3.14.2.1 Switzerland: Rent Adjustment (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can make rent adjustments based on Swiss law in Flexible Real Estate Management (RE-FX). Using this Swiss rent adjustment, you can adjust net rent conditions as a result of changes to the following:

- Mortgage rates
- General maintenance and operating costs
- General increase in the cost of living (protection of purchasing power)
- Net or gross ROI
- Prevailing rent
- Added benefits (modernization investments)

You define these parameters in Customizing for the adjustment rule. You can then assign your adjustment rules to the regional location of the business entity.

Effects on Customizing

Make the required settings in Customizing for Flexible Real Estate Management in these IMG activities:

- **Settings in Standard Customizing:**
  - Define external condition purposes
  - Define statistical condition types for absolute factors
  - Define condition groups for the grouping on the rent change form
  - Create general adjustment rules for Switzerland
    Here you enter the general parameters for adjustment rules. You enter the parameters that are specifically for Switzerland in the IMG activities under Rent Adjustment Based on Swiss Law.

- **Country-Specific Settings:**
  - Activate Country-Specifics

- **Settings in all IMG activities under Rent Adjustment Based on Swiss Law.**

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Switzerland.

8.3.14.2.2 Switzerland: Correspondence (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), new correspondence functions for Switzerland are available in Flexible Real Estate Management (RE-FX). In Switzerland, the required correspondence is in part governed by tenancy law. To help you create the legally required documents, these letters are now available in the standard system. The following correspondence activities are available for Switzerland:
- Rent change form (must be approved by canton)
- Notice form (must be approved by canton)
- Heating/service charge settlement form (heating costs statement)
- Sales-based rent
- Invoice printing
- Dunning (different dunning texts for each process)

**Effects on Customizing**

Make the required settings in Customizing for *Flexible Real Estate Management* in these IMG activities:

- Settings for correspondence in standard system:
  - Define Correspondence Activities
  - Define Correspondence Applications and Assign Correspondence Activities
- Country-Specific Settings:
  - Activate Country-Specifics
- Settings for correspondence in Switzerland:
  - Enter Dunning Area per Process

**See also**

For more information, refer to the *SAP Library.*

Choose *Financials -&gt; Flexible Real Estate Management (RE-FX) -&gt; Country-Specifics -&gt; Switzerland.*

### 8.3.14.2.3 Switzerland: Lease-In with ISR Reference (New)

**Use**

As of *SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600)*, you can add the ISR reference of the invoice, which is provided by the customer, to the payment document from the periodic posting.

There is a function available for this called *Import ISR Reference to Cash Flow Document of Lease-In.* Using this function you can assign reference numbers from the ISR to the corresponding document from the lease-in.
See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Switzerland.

8.3.14.2.4 Switzerland: Accounting (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use new functions for flexibly controlling both incoming payments and dunning in Flexible Real Estate Management (RE-FX). You can adapt these functions to your needs in Customizing.

Effects on Customizing

Make the required settings in Customizing for Flexible Real Estate Management in these IMG activities:

- Country-Specific Settings:
  - Activate Country-Specifics
- Settings under the node Accounting (for Switzerland):
  - Define Clearing Parameter for Incoming Payment
  - Enter Dunning Area per Process

See also

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Switzerland.

8.3.14.2.5 Switzerland: Heating and Service Charge Settlement (New)

Use

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), you can use functions for heating and service charge settlement that are specifically for Switzerland in Flexible Real Estate Management (RE-FX).

In Switzerland, fuel costs are settled with tenants based on consumption. A separate fuel consumption calculation, which uses the FIFO valuation procedure, is now available in RE-FX, so that you can settle fuel consumption even without the Materials Management (MM) component.

In addition, the data medium exchange process for heating expense settlement was adapted to the needs
of Switzerland. In Switzerland the settlement is performed by the owner or his management company and not by a settlement company. Therefore a separate data medium based on measurement documents has been provided for Switzerland.

In addition, in the standard system, you can now calculate surcharges during service charge settlement and add them to the results of the settlement. In Switzerland, this surcharge schema can be used to handle the management costs surcharge. This surcharge is calculated for all rental objects. The amount of the surcharge varies depending on whether the contract is internal or external. For more information see the Release Information on Surcharges.

**Effects on Customizing**

Make the required settings in Customizing for *Flexible Real Estate Management* in these IMG activities:

- **Country-Specific Settings:**
  - Activate Country-Specifics
  - All IMG activities under Service Charge Settlement

**See also**

For more information, refer to the SAP Library.

Choose Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Switzerland.

### 8.3.14.3 RE-FX-LC-AT Real Estate Localization Austria

#### 8.3.14.3.1 Country-Specifics: Austria (New)

**Use**

As of SAP ECC Enterprise Extension Financials 6.0 (EA-FIN 600), the following country-specific functions for Austria are now available in *Flexible Real Estate Management* (RE-FX):

- **Main rent statement**
  Using the main rent statement, you generate an overview of income and expenses for the calendar year. The legal basis for the main rent statement is contained in §20 of Austrian tenancy law. You can specify the structure of the main rent statement using schema items that you assign to a settlement schema in Customizing. For each given settlement item, you choose the necessary calculation method. You can apply your own calculation method by using a BAdI implementation.

- **Adjustment by fifteenths**
  Adjustment by fifteenths is a rent adjustment method that allows for increasing rent incrementally over a period of fifteen years. This procedure is required in certain cases when there is a change of ownership and the tenant is a commercial tenant (Austrian tenancy law §46 MRG).
Effects on Customizing

Make the required settings in Customizing for *Flexible Real Estate Management* in these IMG activities:

General settings:
- Activate Country-Specifics

Settings for main rent statement:
- Set Up Settlement Schema
- Set Up Number Range for Schema Item for Cost Element
- Enter Parameters for Vacancy Reason
- Define List Variants

Settings for adjustment by fifteenths:
- Adjustment by Fifteenths

See also

For more information, refer to the *SAP Library*.

Choose *Financials -> Flexible Real Estate Management (RE-FX) -> Country-Specifics -> Austria*.

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8.3.14.4 RE-FX-LC-IT  
Real Estate Localization Italy

8.3.14.4.1 Flexible Real Estate Management solution for Italy (New)

Use

As of mySAP ERP 2005, Italian companies can use the new flexible real estate management solution for Italy to calculate their taxes in accordance with Italian requirements. This new solution allows more flexibility than the classic real estate management solution. The following new functions are supported:

- You can now divide the rental area into individual rental objects
- You can now maintain ICI-relevant objects in an architectural view, as well as the usage object view
- You now only have to run one report (rather than four) to execute all steps relevant for ICI tax calculation (display data, carry forward, print: downpayment/balance, payment lock) and to subsequently post the payment
- You now only have to run one report (rather than four) to execute all steps relevant for IRE tax calculation (display data, carry forward, post payment, adjust planned payment to actual payment)

You can access the new reports by adding the transaction codes REXCITICI and REXCITIRE to your favorites in the *SAP Easy Access* screen.
Effects on Customizing

To run the new flexible real estate management reports for Italy, you have to carry out the IMG activities in Customizing for *Flexible Real Estate Management (Enterprise Extension)* by choosing

*Country-Specific Settings -> Italy.*

**See also**

For more information about the new reports, see *Flexible Real Estate Management* in the SAP Library by choosing *Financials -> Country Versions -> Europe and Africa -> Italy.*