insightsoftware

Release Notes

Real Estate Manager

Version 25.3.1

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25.3.1 Release Notes

New Features

Custom Report Subscriptions

Real Estate Manager users can now set up automatic email delivery for the saved custom reports. Instead of manually running reports each time, the user can simply subscribe once and receive them on a regular schedule straight to the inbox.

How It Works

1. **Save Your Custom Report**

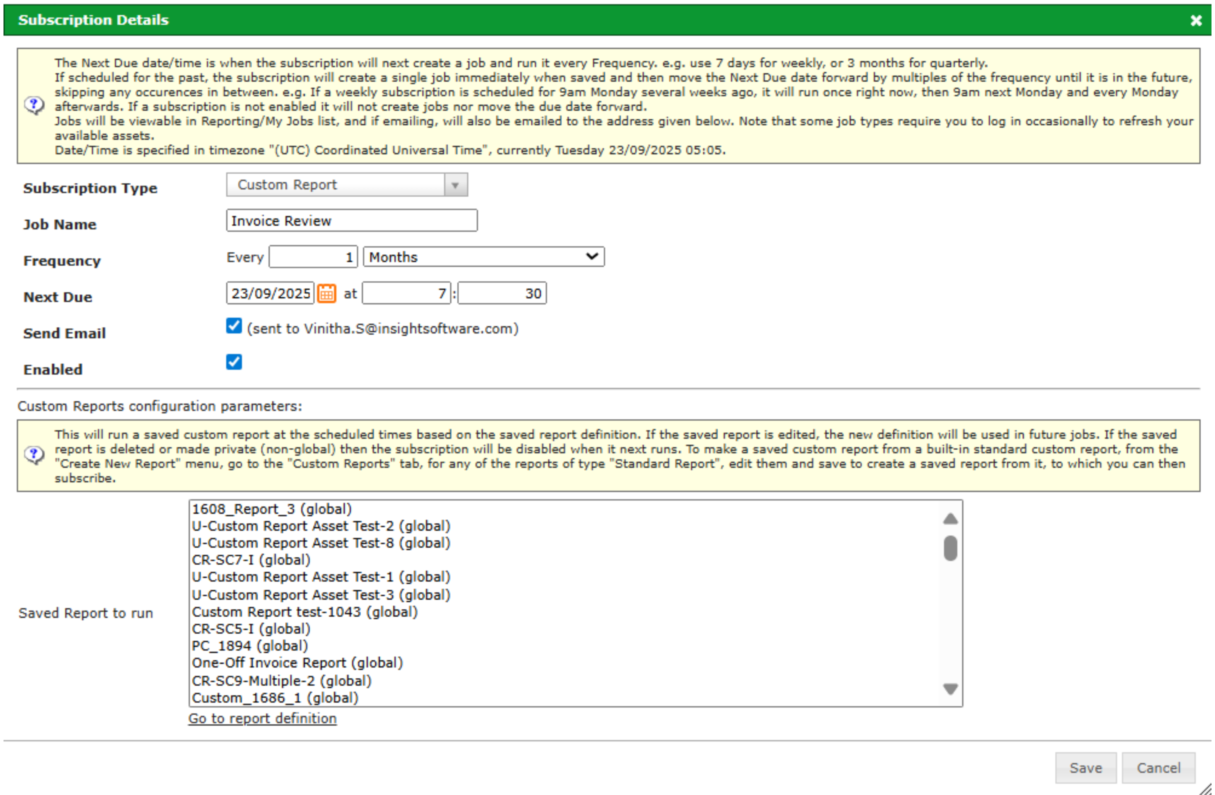
    - Go to the **Reporting** page and create a custom report. Make sure it's saved (not just a built-in or canned report).

2. **Create a Subscription**

    - Navigate to **My Settings** (link available on the reports page).
    - Choose **Add Subscription** and select **Custom Report** as the type.
    - Pick the saved report you want to receive.
    - Set your preferred schedule and date format.

3. **Receive Reports Automatically**

    - Once set up, your report will be emailed to you whenever it runs and there is no need to log in or click anything.



Email Example

Here's what your email might look like:

Subject: REM: 'Monthly invoice costs' Custom report [subscription]

Body:

Hello,

Your subscribed report 'Monthly invoice costs' is attached.

Thanks,

Real Estate Manager

Report Submitted: 31/12/2025 12:34:56

Company: Acme | Job ID: 123 | Subscription ID: 456

Manage your subscriptions

Important Notes

- You can only subscribe to saved custom reports (those with a "delete" option next to them).
- If a report is deleted or made private by another user, your subscription will be disabled automatically.

- You'll see a message if a report you're subscribed to becomes unavailable.
- Editing a saved report updates future subscription jobs with the new settings.
- You can change which report a subscription runs, but not the subscription type once it's created.

Why It Matters

- Save time with automated delivery.
- Stay informed with up-to-date reports.
- Customize your preferences for format and frequency.
- Manage everything easily from one place.

Two level Payment Batch Approval

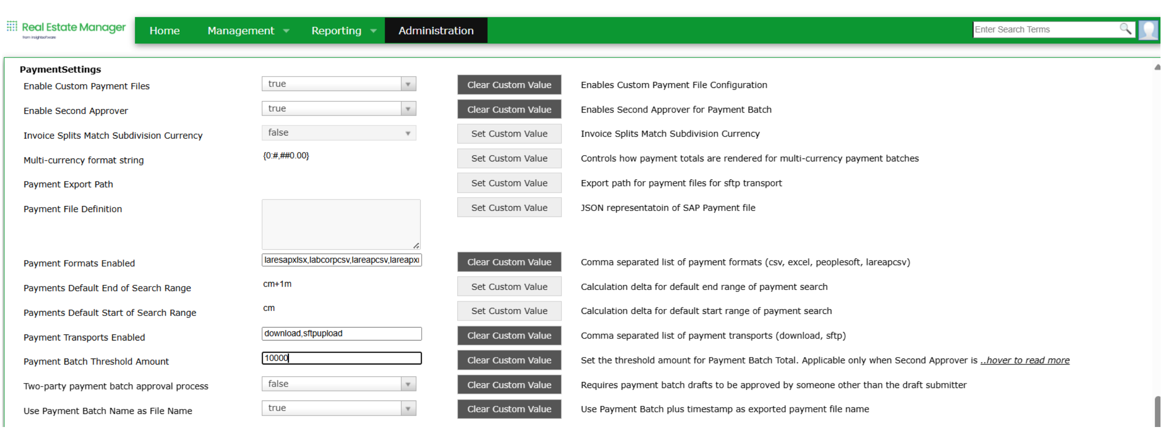
Real Estate Manager's payment workflow now supports second-level approval for payment batches, designed to strengthen financial controls and reduce risk for high-value transactions.

Finance admins can now configure a second reviewer for payment batches that exceed a set threshold. This ensures that large payments are reviewed by two separate users before approval.

How It Works

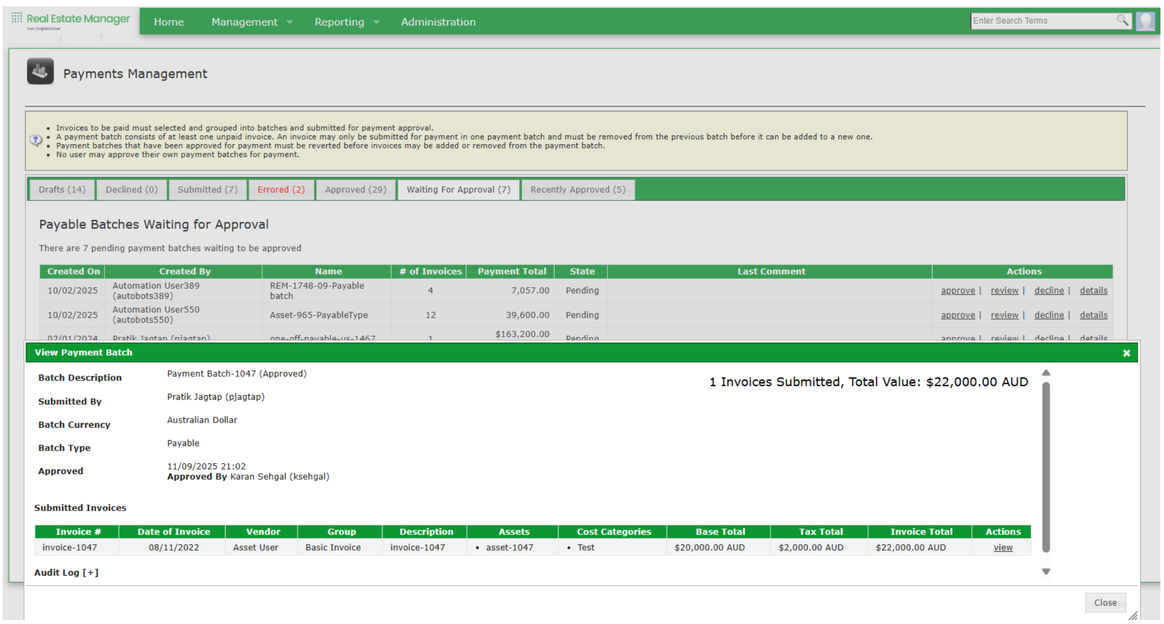
1. **Enable the Feature**

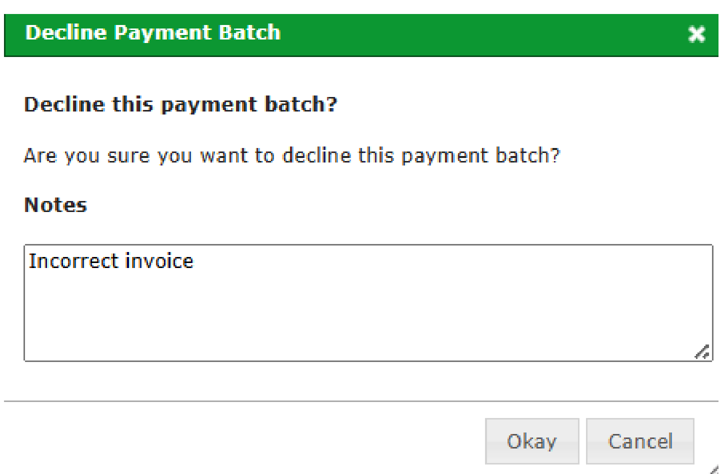
    - Go to **Administration** → **System Configuration Editor** → **Payment Settings** and toggle **Second-Level Approval** ON.
    - Set your **Threshold Amount** (e.g., $10,000).



2. **Approval Workflow**

- If the batch is **below the threshold**, only one approval is needed.
- If the batch is **equal to or above the threshold**:
  a. The first reviewer approves the batch and adds notes.
  b. The system shows a message: “This payment requires a second approver.”
  c. The batch status changes to **Pending Second Approval**.
  d. The second reviewer (must be a different user) reviews and approves or rejects with optional notes.





Important Notes

- The preparer, first reviewer, and second reviewer must be different users.
- No user can approve their own submission.
- Only users with the Second-Level Approver role can approve high-value batches.
- All actions are logged for audit purposes.

Why It Matters

This feature helps prevent unauthorized or accidental approval of large payments by enforcing segregation of duties and adding an extra layer of oversight.

Bulk Import of One-off Invoices - Receivables

The bulk upload feature in Real Estate Manager has been enhanced to support both payable and receivable one-off invoices. Users can now efficiently generate multiple invoices using a downloadable Excel template, reducing manual entry and improving operational efficiency.

Key Enhancements

- A new column **isReceivable** has been added to the bulk upload template.
- Users can specify whether each invoice is payable or receivable.
- The system automatically validates invoice types and contracts based on the selected direction.

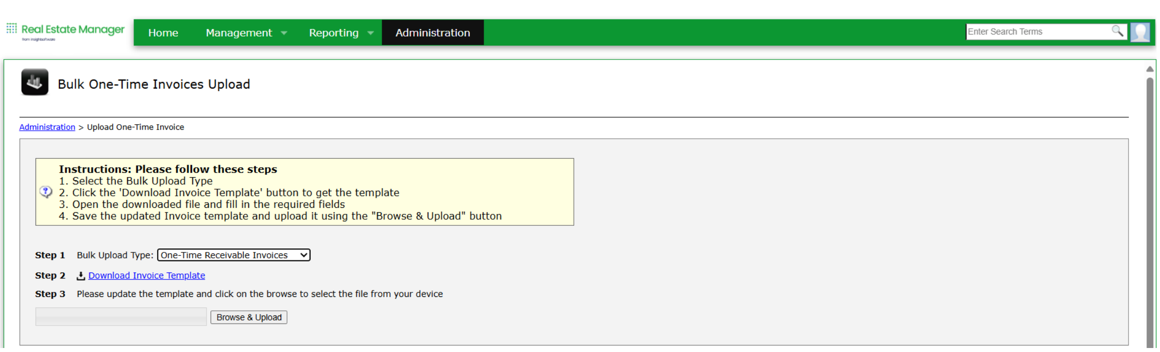
How It Works

1. **Select the Bulk Upload Type**

   Navigate to **Administration > Bulk One-time Invoices Upload** and select the **Bulk Upload Type** as 'One-Time Payable Invoices' or 'One-Time Receivable Invoices'.

2. **Download the Template**

   Click **Download Invoice Template** to download the latest template.



3. **Enter Invoice Data**

   Fill in required fields including:

   - Invoice Number
   - Vendor
   - Currency
   - Cost Description
   - Base Amount
   - Tax Multiplier
   - Tax Amount
   - Total Amount
   - **isReceivable** (set to **true** for receivable invoices)

4. **Upload the File**

   Save the completed file and upload it via the same page. The system will process the file and display results in the **Upload History** grid.

5. **Review Upload Status**

   View success or failure messages and download the result file to correct any errors.

Validation and Filtering

- Invoice types and contracts are filtered based on the **isReceivable** flag.
- Receivable invoices must use invoice types and contracts marked as receivable.
- Payable invoices must use types and contracts not marked as receivable.

Audit Logging

All uploads and updates are logged with timestamps, user details, and action history, accessible via the **Audit Logs** grid.

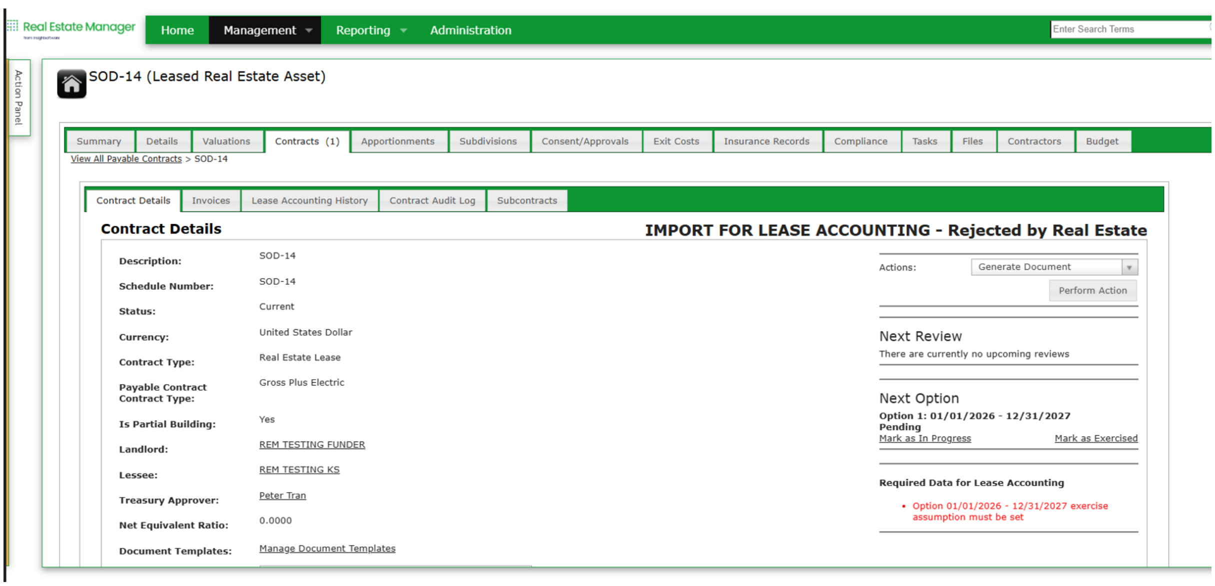
Best Practices

- Always use the latest template.
- Refer to master data tabs for valid values.
- Double-check tax and total calculations.
- Use the result file to fix and re-upload failed rows.

Other Improvements

Minor Improvement - Bug Fix with Contract Sync Wizard

Real Estate Manager now allows the users to re-initiate the lease readiness review if a contract sync is rejected. Previously, contracts with renewal options marked as "Not Reasonably Certain" showed an error and blocked users from updating the option state. This fix allows users to confirm or edit the option state again, removing the error and ensuring smooth contract progression.



Minor Improvement- Bug Fix with Custom Clause Management – Dropdowns, Persistence, and Validation

The **Add Custom Clause** functionality in REM has been improved to provide an enhanced user experience within the contract management workflow.

- Dropdowns now show all predefined, ad-hoc, and custom categories and clauses, excluding irrelevant entries.

- Duplicate entries and special characters trigger validation errors.
- Newly added categories and clauses appear instantly in dropdowns.

These updates ensure a cleaner interface and better clause management.

Minor Improvement- Bug Fix with Lease Records from REM QA Environment Appearing in Production Environment

The Real Estate Manager and Lease Accounting Module environments were previously syncing incorrectly due to manual URL configuration, causing data to appear in the wrong environment. This issue has been resolved by removing manual URL entries and setting up a fixed, automatic connection between the two systems. Now, each environment syncs only within its own setup, with no manual intervention required, ensuring data remains isolated and accurate.