



Release Notes

Real Estate Manager

Version 25.3.1



Document Information

Notices

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This guide is designed to help you to use the Real Estate Manager applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

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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.

Subscription Details

The Next Due date/time is when the subscription will next create a job and run it every Frequency. e.g. use 7 days for weekly, or 3 months for quarterly. If scheduled for the past, the subscription will create a single job immediately when saved and then move the Next Due date forward by multiples of the frequency until it is in the future, skipping any occurrences in between. e.g. If a weekly subscription is scheduled for 9am Monday several weeks ago, it will run once right now, then 9am next Monday and every Monday afterwards. If a subscription is not enabled it will not create jobs nor move the due date forward. Jobs will be viewable in Reporting/My Jobs list, and if emailing, will also be emailed to the address given below. Note that some job types require you to log in occasionally to refresh your available assets. Date/Time is specified in timezone "(UTC) Coordinated Universal Time", currently Tuesday 23/09/2025 05:05.

Subscription Type
Custom Report

Job Name
Invoice Review

Frequency
Every 1 Months

Next Due
23/09/2025 at 7:30

Send Email
☒ (sent to Vinitha.S@insightsoftware.com)

Enabled
☒

Custom Reports configuration parameters:

This will run a saved custom report at the scheduled times based on the saved report definition. If the saved report is edited, the new definition will be used in future jobs. If the saved report is deleted or made private (non-global) then the subscription will be disabled when it next runs. To make a saved custom report from a built-in standard custom report, from the "Create New Report" menu, go to the "Custom Reports" tab, for any of the reports of type "Standard Report", edit them and save to create a saved report from it, to which you can then subscribe.

Saved Report to run

1608_Report_3 (global)
U-Custom Report Asset Test-2 (global)
U-Custom Report Asset Test-8 (global)
CR-SC7-I (global)
U-Custom Report Asset Test-1 (global)
U-Custom Report Asset Test-3 (global)
Custom Report test-1043 (global)
CR-SC5-I (global)
PC_1894 (global)
One-Off Invoice Report (global)
CR-SC9-Multiple-2 (global)
Custom_1686_1 (global)
[Go to report definition](#)

Save
Cancel

Email Example

Here's what your email might look like:

Subject: Real Estate Manager: '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

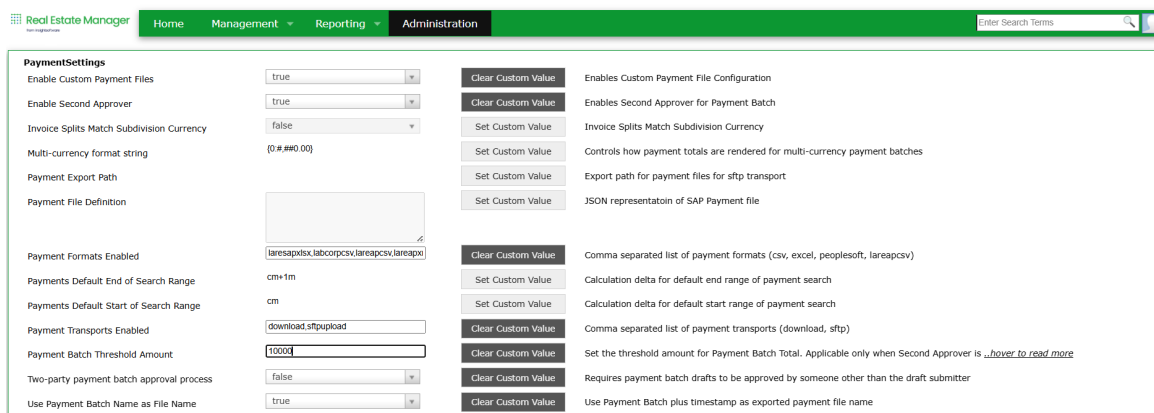
Real Estate Manager's payment workflow now supports second-level approval for payment batches, designed to strengthen financial controls and reduce risk for high-value transactions.

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).



Setting	Value	Action	Description
Enable Custom Payment Files	true	Clear Custom Value	Enables Custom Payment File Configuration
Enable Second Approver	true	Clear Custom Value	Enables Second Approver for Payment Batch
Invoice Splits Match Subdivision Currency	false	Set Custom Value	Invoice Splits Match Subdivision Currency
Multi-currency format string	{0:#,##0.00}	Set Custom Value	Controls how payment totals are rendered for multi-currency payment batches
Payment Export Path		Set Custom Value	Export path for payment files for sftp transport
Payment File Definition		Set Custom Value	JSON representation of SAP Payment file
Payment Formats Enabled	larsapstx,laborpcsv,larsapcsv,larsapm	Clear Custom Value	Comma separated list of payment formats (csv, excel, peoplesoft, larsapcsv)
Payments Default End of Search Range	cm+1m	Set Custom Value	Calculation delta for default end range of payment search
Payments Default Start of Search Range	cm	Set Custom Value	Calculation delta for default start range of payment search
Payment Transports Enabled	download,sftpload	Clear Custom Value	Comma separated list of payment transports (download, sftp)
Payment Batch Threshold Amount	10000	Clear Custom Value	Set the threshold amount for Payment Batch Total. Applicable only when Second Approver is "hover to read more"
Two-party payment batch approval process	false	Clear Custom Value	Requires payment batch drafts to be approved by someone other than the draft submitter
Use Payment Batch Name as File Name	true	Clear Custom Value	Use Payment Batch plus timestamp as exported payment file name

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.

Real Estate Manager
Home
Management
Reporting
Administration
Enter Search Terms

Payments Management

- Invoices to be paid must be selected and grouped into batches and submitted for payment approval.
- A payment batch consists of at least one unpaid invoice. An invoice may only be submitted for payment in one payment batch and must be removed from the previous batch before it can be added to a new one.
- Payment batches that have been approved for payment must be reverted before invoices may be added or removed from the payment batch.
- No user may approve their own payment batches for payment.

Drafts (14)
Declined (0)
Submitted (7)
Errored (2)
Approved (29)
Waiting For Approval (7)
Recently Approved (5)

Payable Batches Waiting for Approval

There are 7 pending payment batches waiting to be approved

Created On	Created By	Name	# of Invoices	Payment Total	State	Last Comment	Actions
10/02/2025	Automation User389 (autobots389)	REM-1748-09-Payable batch	4	7,057.00	Pending		approve review decline details
10/02/2025	Automation User550 (autobots550)	Asset-965-PayableType	12	39,600.00	Pending		approve review decline details
07/01/2024	Pratik Jagan (pratikjagan)	asset-1047-PayableType-1467	1	\$163,200.00	Declined		approve review decline details

View Payment Batch

Batch Description
Payment Batch-1047 (Approved)

Submitted By
Pratik Jagtap (pragtap)
1 Invoices Submitted, Total Value: \$22,000.00 AUD

Batch Currency
Australian Dollar

Batch Type
Payable

Approved
11/09/2025 21:02
Approved By Karan Sehgal (ksehgal)

Submitted Invoices

Invoice #	Date of Invoice	Vendor	Group	Description	Assets	Cost Categories	Base Total	Tax Total	Invoice Total	Actions
invoice-1047	08/11/2022	Asset User	Basic Invoice	invoice-1047	asset-1047	Test	\$20,000.00 AUD	\$2,000.00 AUD	\$22,000.00 AUD	view

Audit Log [+]

Decline Payment Batch

Decline this payment batch?

Are you sure you want to decline this payment batch?

Notes

Incorrect invoice

Okay

Cancel

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.

The screenshot shows the 'Bulk One-Time Invoices Upload' page in the Real Estate Manager application. The navigation bar at the top includes 'Home', 'Management', 'Reporting', and 'Administration'. The main content area has a breadcrumb trail 'Administration > Upload One-Time Invoice'. A yellow box contains instructions: 'Instructions: Please follow these steps: 1. Select the Bulk Upload Type, 2. Click the 'Download Invoice Template' button to get the template, 3. Open the downloaded file and fill in the required fields, 4. Save the updated Invoice template and upload it using the 'Browse & Upload' button'. Below the instructions, there are three steps: 'Step 1 Bulk Upload Type: One-Time Receivable Invoices' (with a dropdown arrow), 'Step 2 Download Invoice Template' (with a download icon and a link), and 'Step 3 Please update the template and click on the browse to select the file from your device' (with a 'Browse & Upload' button).

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 Real Estate Manager 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 Real Estate Manager 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.