



Release Notes

Real Estate Manager

Version 25.3



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 Release Notes

New Features

Trigger Contract Modifications

Real Estate Manager now provides lease administrators with the ability to manually trigger contract modifications from the Lease Variation screen, overriding automatic system rules when accounting policies or special circumstances require modification treatment. This enhancement addresses scenarios where finance and lease teams need to apply accounting judgment beyond standard system logic.

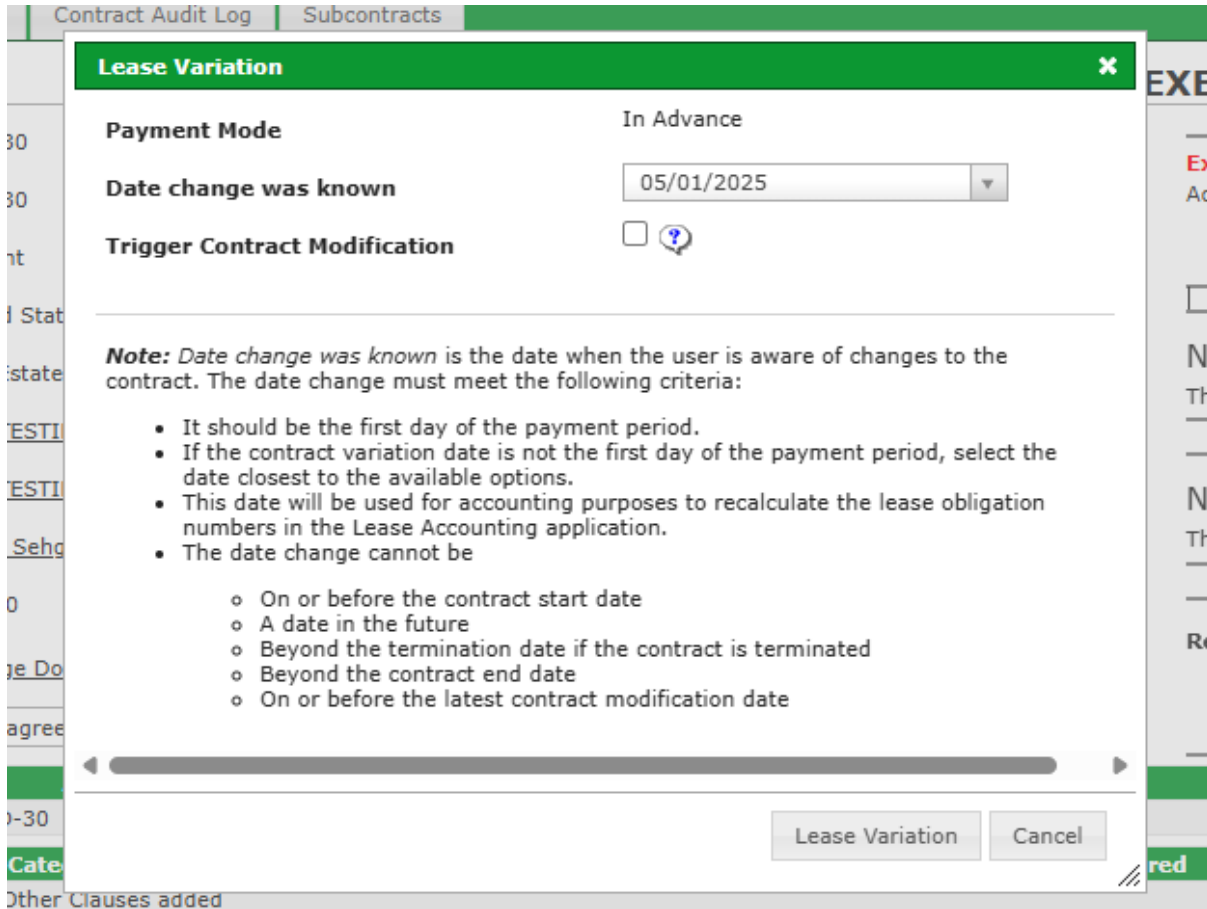
Previously, the system auto-determined contract modifications based on fixed rules, limiting the finance and lease teams' ability to handle special scenarios such as formal renegotiations, IBR overrides, or cases where only payment terms change but accounting policy requires modification treatment. This often resulted in workarounds or requests to accounting teams that could have been handled directly in Real Estate Manager.

Key Enhancements

- **"Trigger Contract Modification" Checkbox:** A new checkbox has been added to the Lease Variation screen, enabling users to manually force a contract modification regardless of whether the system's automatic rules would typically trigger one.
- **Contextual Guidance:** Hovering over the checkbox displays a comprehensive tooltip explaining when and why to use this feature: "Check this box to force a contract modification, regardless of system rules. Use when accounting policy requires a modification—for example, in formal renegotiations or renewals where only payment terms change, or when the accounting team needs to override the IBR applied by the system."
- **Override System Logic:** When the checkbox is selected, the system treats the variation as a contract modification and follows the complete modification workflow, even if the changes would not normally qualify for modification treatment under standard rules.

Validation and Controls

- **Edge Case Protection:** The system includes validation to prevent inappropriate use—specifically blocking lease variations where the **Trigger Contract Modification** checkbox is selected alongside Non-Reasonably Certain renewal options or exercised Month-to-Month options.



Automated Email Delivery for Custom Reports

Real Estate Manager now enables users to receive custom reports directly via email upon job completion, eliminating the need to manually check back into the system to download completed reports. This enhancement streamlines the reporting workflow and provides greater flexibility in how users access their generated reports.

Key Enhancements

Previously, users had to follow a tedious process of logging into Real Estate Manager, generating reports, waiting for completion, and then returning to download the results. The new email delivery feature allows users to receive their custom reports automatically without requiring active monitoring of job status.

- **One-Click Email Option:** Users can now select an "Email" option when running custom reports from the Custom Reports page, automatically sending the completed report to their registered email address upon successful job completion.
- **Flexible Delivery Options:** Users maintain the choice between traditional download-only behavior and the new email delivery feature, providing workflow flexibility based on individual preferences and requirements.

User Workflow

To receive reports via email:

- Navigate to the **Custom Reports** page.
- Click the **Email** link next to any built-in custom report.
- The system automatically queues the report job with email delivery enabled.
- Receive the completed report via email with appropriate subject line and attachment.
- Optionally download the report through the job results page.

Good to Know

- Email delivery is currently available for custom reports only; standard reports continue to use existing download workflows.
- Email addresses are automatically synchronized with user profile updates to ensure delivery accuracy. The user cannot configure email ids of any other user.

The screenshot shows the 'Reporting' section of the Real Estate Manager interface. It features a search bar and a 'Create New Custom Report' button. Below is a table with columns for Report Name, Description, Type, Last Updated, and Action. The 'Action' column for each row contains links for 'Export', 'Email', 'Edit', and 'Delete'. The 'Email' link for the first row is highlighted with a red box.

Report Name	Description	Type	Last Updated	Action
LA-63581 (Global)	LA-63581	Saved Report	06/23/2025	Export Email Edit Delete
REM-1130-1-Report (Global)	REM-1130-1-Report	Saved Report	06/16/2025	Export Email Edit Delete
LA-43897 (Global)	LA-43897	Saved Report	05/27/2025	Export Email Edit Delete
LA-43903 (Global)	LA-43903	Saved Report	05/27/2025	Export Email Edit Delete
LA-2049 (Global)	LA-2049	Saved Report	05/21/2025	Export Email Edit Delete
LA-20491-1 (Global)	LA-20491-1	Saved Report	05/20/2025	Export Email Edit Delete
LA-20491 (Global)	LA-20491	Saved Report	05/20/2025	Export Email Edit Delete
1608_Report_1 (Global)	1608_Report_1	Saved Report	05/13/2025	Export Email Edit Delete
REM-1258-withCheckbox-0 (Global)	REM-1258-withCheckbox-0	Saved Report	05/09/2025	Export Email Edit Delete
LA-20506 (Global)	LA-20506	Saved Report	05/05/2025	Export Email Edit Delete
LA-20492 (Global)	LA-20492	Saved Report	05/05/2025	Export Email Edit Delete
Custom_1686_2 (Global)	Custom_1686_2	Saved Report	04/29/2025	Export Email Edit Delete
REM_PC_1894_QA_Report (Global)	Valuation Report	Saved Report	04/11/2025	Export Email Edit Delete
LA-63585 (Global)	LA-63585	Saved Report	04/08/2025	Export Email Edit Delete
LA-59476-InvoiceVendorReport (Global)	LA-59476-InvoiceVendorReport	Saved Report	03/27/2025	Export Email Edit Delete
REM-1652-13 Custom Report (Global)	REM-1652-13 Custom Report	Saved Report	03/20/2025	Export Email Edit Delete
REM-1652-07 Custom Report (Global)	REM-1652-07 Custom Report	Saved Report	03/20/2025	Export Email Edit Delete
REM-1652-10 Custom Report (Global)	REM-1652-10 Custom Report	Saved Report	03/20/2025	Export Email Edit Delete
REM-1652-09 Custom Report (Global)	REM-1652-09 Custom Report	Saved Report	03/20/2025	Export Email Edit Delete
LA_59513_CustomReport (Global)	LA_59513_CustomReport	Saved Report	02/27/2025	Export Email Edit Delete

Rollback of Lease Variation

Real Estate Manager now enables users to independently rollback the latest lease modifications, eliminating the need for support tickets and backend interventions when errors occur during contract modifications.

Previously, users who made errors during lease modifications such as incorrectly adding renewal options, updating contract terms, or modifying assets had to create support tickets for manual rollback assistance.

Key Enhancements

- **Self-Service Rollback:** Users can now access "Rollback Lease Variation" directly from the contract dropdown menu when a modification has been completed, allowing immediate correction of errors without external assistance.
- **Confirmation Workflow:** The system prompts users to confirm rollback actions before execution, preventing accidental reversions and ensuring intentional corrections.
- **Seamless Re-synchronization:** After rollback completion, users can re-enter correct data and synchronize updates with the Lease Accounting Manager application, maintaining data integrity across systems.

Availability and Controls

- **Context-Sensitive Access:** The rollback option appears only when contracts have been modified and synced with LAM, ensuring appropriate usage.
- **Dynamic Visibility:** The rollback option automatically disappears once users perform subsequent actions requiring synchronization, maintaining workflow integrity.

The screenshot displays the 'Real Estate Manager' application interface. At the top, there is a navigation bar with 'Home', 'Management', 'Reporting', and 'Administration' tabs. Below this is a search bar and a breadcrumb trail: 'View: All Payable Contracts > TEST-1009'. The main content area is divided into several sections. On the left, there are tabs for 'Contract Details', 'Invoices', 'Lease Accounting History', 'Contract Audit Log', and 'Subcontracts'. The 'Contract Details' tab is selected, showing a form with the following fields:

- Description: TEST-1009
- Schedule Number: TEST-1009-M001
- Status: Current
- Currency: United States Dollar
- Contract Type: Expenditure Lease
- Payable Contract Contract Type: True/Operating Lease (FRV)
- Is Partial Building: No
- Landlord: BEN TESTING FUNDBR
- Lessee: BEN TESTING KS
- Treasury Approver: Finance Approver
- Net Equivalent Ratio: 0.0000
- Document Templates: Manage Document Templates
- Guarantees: This agreement currently does not have any guarantees.
- Assets: A table with columns 'Asset', 'Primary Asset', and 'Primary Asset Status'. The row shows 'TEST-1009' as the Primary Asset.
- Other Clauses: A table with columns 'Category', 'Name', 'Section', 'Current Clause Details', and 'Triggered'. It shows 'No Other Clauses added'.
- Notes: A text area for notes.
- Current Costs: A table with columns 'Category', 'Name', 'Base Amount', 'Tax Amount', 'Total Amount', 'Frequency', 'P.A. Ex Tax', and 'Cost Per Area P.A.'. The row shows a cost of \$119,000.00 USD.

On the right side of the 'Contract Details' section, there is a 'VARY LEASE - Synchronized' section. It includes an 'Actions' dropdown menu with the following options: 'Please select an option', 'Enter Hold-Over', 'Lease Variation', 'Update Reasonable Certainty', 'Bulk Participant Updates', 'Import One-Time Payments', 'Rollback Contract', 'Rollback Lease Variation', 'Update Asset', 'Terminate Payable Contract', and 'Attach Files To Deal'. Below the actions menu, there are sections for 'Next Review' and 'Next Option', each with a 'There are currently' label and a list of actions.

At the bottom of the page, there is a small text indicating the user is logged in as 'karan selgal' and that dates are in the format dd/MM/yyyy.

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Rollback Lease Variation
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The following changes will be reverted and the rollback cannot be undone. Please review and confirm the same. Rollback will need a synchronization with the Lease Accounting Manager Application.

Term Duration

Section	Change	Details
Duration	Added	Option added: Option 1 01/01/2025 - 31/12/2025, Exercised
Duration	Updated	Projected Term End has changed from 31/12/2024 to 31/12/2025

Other Contract Detail Changes

Section	Change	Details
Actioned Costs	Added	Reviewed on 01/01/2025, New cost: Rent for TEST-1009 (TEST-1009) [rent]: Paid In Advance Monthly on the 1st of the month, \$16,000.00 No Tax (\$192,000.00 P.A. ex Tax)

Rollback Lease Variation

Cancel

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Enhanced Contract Cost Display with Tabular View

Real Estate Manager now provides an improved contract cost viewing experience through a new tabular display format that enhances readability.

Key Enhancements

The contract cost section previously displayed information in a predominantly text-based format, creating visual clutter and making it challenging to extract insights quickly. The new tabular view streamlines cost analysis and provides better data organization for improved decision-making.

Tabular Cost Display: Users can now access a "View Cost as Table" link on both contract and lease variation pages, opening a modal with contract cost data presented in a clean, structured table format with organized headers and detailed cost breakdowns.

Enhanced Navigation: The table includes sticky headers and both vertical and horizontal scrollbars to accommodate large datasets, ensuring users can navigate extensive cost structures while maintaining column context.

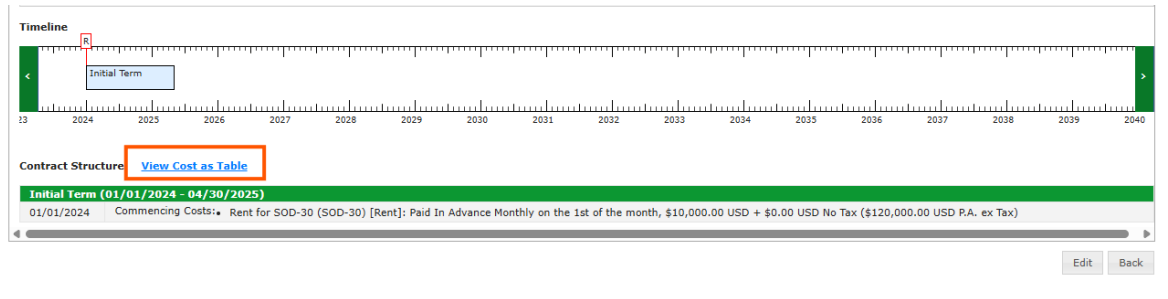
User Workflow

To access the tabular cost view:

- Navigate to the contract or lease variation page.
- Click on **View Cost as Table** link in the contract cost section.
- Review cost data in the structured table format.

Good to Know

The tabular view is available on both contract pages and lease variation screens for consistency.



Notes	Review Date	Type	State	Vendor	Description	First Invoice	Then Every	Invoice Group	Label	Asset	Category	Jurisdiction	Tax Rate	Payment	Tax Amount	Total Non-PA	Total P
	01/01/2024	Commencing	Commencing						Rent	SOD-30 (SOD-30)	Rent	USA	No Tax (0%)	10,000.00	0.00	10,000.00	120,000.

Share Documents From Real Estate Manager to Lease Accounting Management

Real Estate Manager now enables users to sync supporting documentation with the Lease Accounting Management (LAM) system. This enhancement provides greater flexibility and control over document management workflows.

Key Enhancements

Previously, users could share documents with the accounting team. This new feature allows targeted document synchronization without affecting the main lease data.

- **Independent Document Sync Modal:** Users can access a new "Attach files to Deal" option from the contract dropdown menu when a lease is synced with Core but not yet booked or approved in LAM.
- **Selective File Management:** The modal displays all documents linked to the contract and asset, allowing users to select or deselect individual files for synchronization with full control over which documents are sent.
- **File Annotation Support:** Users can add custom notes for each selected file, providing context and additional information that will be transmitted to LAM alongside the documents.
- **File Size Validation:** The system automatically blocks files exceeding 20 MB and displays appropriate warnings to prevent technical issues during synchronization.

Supported File Types

The file formats supported for LAM synchronization are XLSX, ZIP, PDF, DOCX, CSV, DOC, TXT, XLS, XML, JPG, MSG, PNG, PPT, PPTX, RTF and TIF.

User Workflow

To sync documents independently with LAM:

- Navigate to a contract that has been synced with LAM.
- Select **Attach files to Deal** from the contract dropdown menu.
- Review all available documents in the modal and select desired files.
- Add **Comments** for each selected file as needed.
- Click **Upload** to initiate the sync or **Cancel** to close without sending.

Contract Details

Description: SOD-30
 Schedule Number: SOD-30
 Status: Current
 Currency: United States Dollar
 Contract Type: Real Estate Lease
 Landlord: REM TESTING FLUNDER
 Lessee: REM TESTING KS
 Treasury Approver: Karan Sehgal
 Net Equivalent Ratio: 1.0000
 Document Templates: Manage Document Templates
 Guarantees: This agreement currently does not have any guarantees.

Asset	Primary Asset Status	Actions
SOD-30	Primary Asset	View

Other Clauses:
 No Other Clauses added

Current Costs:

Category	Name	Base Amount	Tax Amount	Total Amount	Frequency	P.A. Ex Tax	Cost Per Area P.A.
Rent	Rent	\$10,000.00 USD	\$0.00 USD	\$10,000.00 USD	Monthly	\$120,000.00 USD	

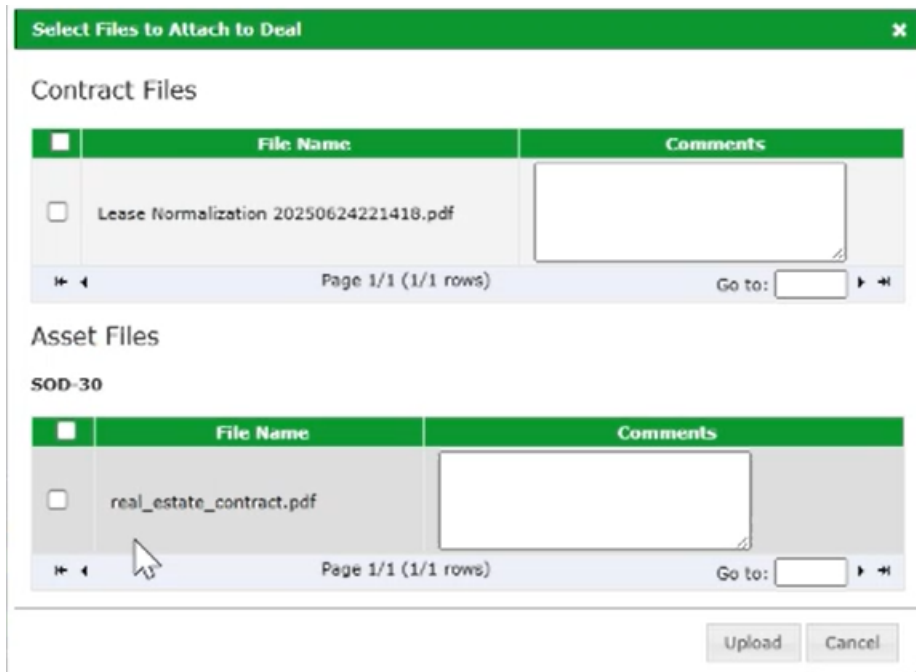
EXERCISE OPTION - Synchronized

Expired
 Actions: Attach Files To Deal
 Perform Action

Next Review
 There are currently no upcoming reviews

Next Option
 There are currently no upcoming options

Required Data for Lease Accounting
 Contract expired on 04/30/2025 and contract is not in holdover



Good to Know

- Multiple file syncs can be performed for the same contract, supporting ongoing document updates and changes.
- Documents can be synced even when Day 2 changes have been made in Real Estate Manager but are pending approval or booking in LAM.
- The same file can be sent multiple times without causing duplicate file issues in LAM.
- All notes sent to LAM are automatically prefixed with "Real Estate Manager" for clear source identification.

Why It Matters

This enhancement streamlines document management workflows by decoupling document synchronization from lease data synchronization, enabling faster response times for accounting teams and reducing dependencies in lease processing workflows.

Other Improvements

Minor Improvement - Bug Fix with Termination of Lease and Non-lease Accounting Significant Contracts

Real Estate Manager has resolved issues related to the contract termination feature for non-lease accounting significant contracts. The system previously displayed unexpected error messages when users attempted to terminate non-lease accounting significant contracts, even though the termination

process would complete successfully in the background. Additionally, users were unable to reverse terminations due to a missing "Rollback of Termination" action button, forcing them to create service tickets or set up new contracts to restore functionality.

Fixes Applied:

- **Error Message Resolution:** Eliminated unexpected error messages that appeared during contract termination for non-lease accounting significant contracts. The termination process now completes smoothly without displaying erroneous error dialogs.
- **Rollback Functionality Restored:** Added the missing "Rollback of Termination" button to the Actions dropdown menu for both lease accounting significant and non-lease accounting significant contracts, enabling users to reverse terminations when needed.

