



Release Notes

Real Estate Manager

Version 25.2.1



Document Information

Notices

Copyright

Real Estate Manager is a brand name of the insightsoftware.com Group. insightsoftware.com is a registered trademark of insightsoftware.com Limited. Real Estate Manager is a registered trademark of insightsoftware.com International Unlimited.

Other product and company names mentioned herein may be the trademarks of their respective owners. The insightsoftware.com Group is the owner or licensee of all intellectual property rights in this document, which are protected by copyright laws around the world. All such rights are reserved.

The information contained in this document represents the current view of insightsoftware.com on the issues discussed as of the date of publication. This document is for informational purposes only. insightsoftware.com makes no representation, guarantee or warranty, expressed or implied, that the content of this document is accurate, complete or up to date.

Disclaimer

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.



Contents

Document Information	2
Notices	2
Contents	3
25.2.1 Release Notes	4
New Feature	4
Other Improvements	17



25.2.1 Release Notes

New Feature

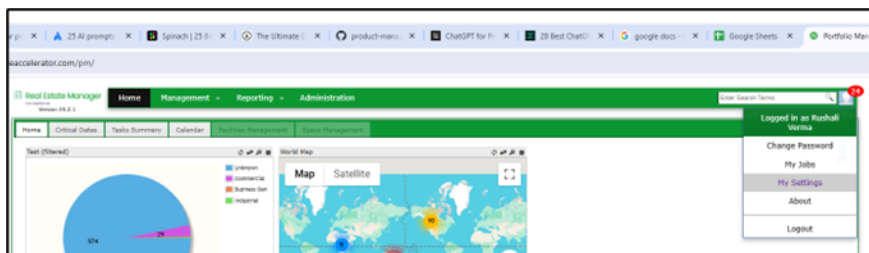
Enhanced Subscription Filters for Critical Dates Digest

Real Estate Manager now allows users to apply filters when managing subscriptions for the **Critical Dates Digest**. This helps for more targeted and relevant reports delivered via email.

Key Enhancements:

The following are the key enhancements:

- Users can now filter by **Terms, Critical Dates Due, Include Overdue Items, Business Units, Asset Types, Task Categories, and Assignees.**
- Filters can be applied when editing or creating a subscription via **My Settings > Email and Job Subscription.**



Manage My Settings

Date time format

Preferred date format setting will take affect once the formats are edited and saved

Current Date format MM/dd/yyyy

Current Date Time format MM/dd/yyyy HH:mm

Current Long Date Time format dddd dd/MM/yyyy HH:mm [change date formatting](#)

Calendar Feed Notifications

Notification settings will take affect the next time the feed is polled by the calendaring application.

[add notification](#) [save notifications](#)

Email and Job Subscriptions

This will allow you to manage job subscriptions, which creates a new job on a recurring basis, and optionally sends an email on completion. The job results will also be available in Reporting/My Jobs list

Subscription Name	Job Type	Recurrence	Enabled	Email	Actions
DoNotEdit_Legacy_Job_Critical Dates	CriticalDatesDigest	Thursday 12/06/2025 02:08 then every 7 Days	Enabled	r.verma@leaseaccelerator	Edit Delete
Contract Clause and consent	CriticalDatesDigest	Thursday 12/04/2025 02:59 then every 1 Days	Enabled	r.verma@leaseaccelerator	Edit Delete
DoNotEdit_2	CriticalDatesDigest	Thursday 12/06/2025 07:30 then every 2 Days	Enabled	r.verma@leaseaccelerator	Edit Delete
LA-63890	CriticalDatesDigest	Thursday 12/06/2025 08:41 then every 1 Days	Enabled	r.verma@leaseaccelerator	Edit Delete
NoSelection_All	CriticalDatesDigest	Friday 13/06/2025 02:05 then every 7 Days	Enabled	r.verma@leaseaccelerator	Edit Delete
LA-63894	CriticalDatesDigest	Friday 13/06/2025 04:52 then every 7 Days	Enabled	r.verma@leaseaccelerator	Edit Delete

[Create new subscription](#)

- Subscriptions remain private and cannot be forwarded to others.
- Users can review the status of scheduled digest reports via **Reports > View Current Jobs.**

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, April 8, 2025 02:36.

Subscription Type Critical Dates Digest ▾

Job Name

Frequency Every Days ▾

Next Due 04/08/2025 at :

Send Email (sent to RCallaghan@leaseaccelerator.com)

Enabled

Critical Dates Digest configuration parameters:

Critical Date Types to include Terms/Options
Reviews
Contract Clauses
Compliance
Tasks
Consent Approvals ▾

Critical dates in next Next 30 days ▾

Also include overdue dates

Business units BU001
E001 ▾

Asset types Real Estate Asset ▾

Task Categories cat1 ▾

Task Assignees Anthony Fawcett (AFawcett)
Abinash Mishra (amishra)
Amit Sharma (ASharma)
Anagha Watkar (AWatkar)
Bibek Sinha (bsinha)
Pooja Cherukuri (cpooja)
David Emerson (DEmerson)
Gurpreet Singh Sethi (gsinghsethi) ▾

Good to Know:

- If no filters are selected, all data will be included by default.
- Existing subscriptions continue to work without changes.
- New filters are available when editing or creating a subscription under **My Settings > Email and Job Subscription**.
- View report status under **Reports > View Current Jobs**.
- Digest emails remain private and cannot be forwarded.

Why It Matters:

This update helps to stay focused by delivering more relevant, personalized email digests eliminating noise and surfacing what matters the most.

Bulk Update of One time Payable Invoices

The bulk upload feature in Real Estate Manager enables the users to efficiently upload and update multiple one-time payable invoices using a download-able bulk upload template. This eliminates the need to manually update each invoice through the user interface, providing a faster and more scalable workflow.

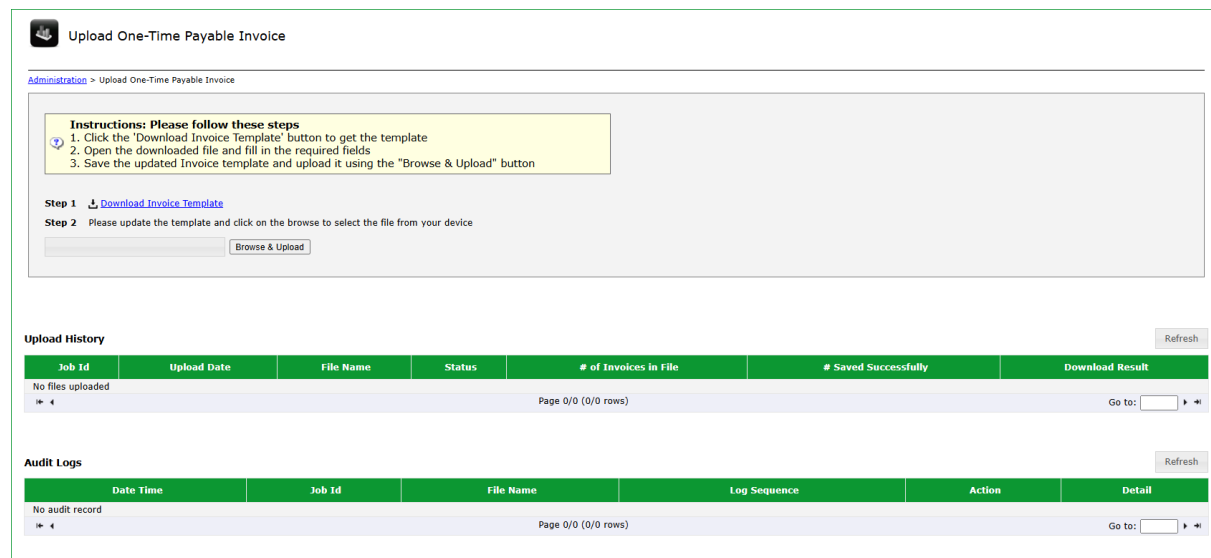
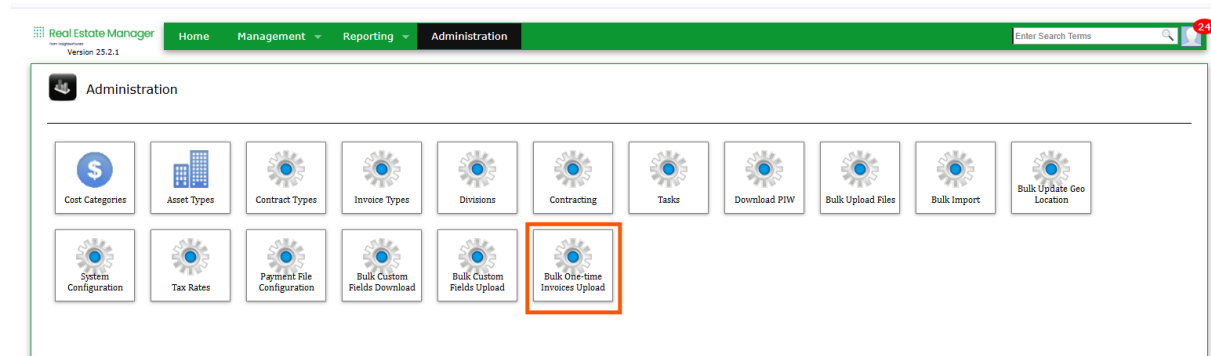
Note:

This feature is applicable only for one-time payable invoices. It does not support recurring payable invoices or receivable invoices.

To bulk-upload one-time payable invoices follow the steps below:

Access the Bulk Upload Page

1. Navigate to the **Administration** section in Real Estate Manager.
2. Click on **Bulk One-time Invoices Upload**.



Download the Template

1. Click on the **Download Invoice Template** option. The Excel template file (.xlsx) will be downloaded. The template includes:
 - a. Columns for required invoice data (such as Invoice Number, Vendor, Currency, Tax Amount, etc.).
 - b. Reference sheets with master data for fields like:
 - Vendors
 - Linked Contracts
 - Invoice Types
 - Invoice Groups
 - Assets
 - Jurisdictions
 - Cost Categories
 - Multipliers
 - c. A sample data sheet to guide formatting and entry.
2. Open the downloaded file to begin data entry.

Enter Invoice Data

Fill in all required fields in the template. Use the master data reference sheets to fill in valid values. Ensure all required fields are completed:

- Invoice Number
- Vendor
- Currency
- Cost Description
- Base Amount
- Tax Multiplier (must be entered manually. Refer to master data for jurisdiction-specific values)

- Tax Amount (must be calculated manually)
- Total Amount

Note:

Tax and total amounts are not calculated automatically. Use the formula:

Tax Amount = Base Amount × Tax Rate Multiplier

A variance of ±0.02 is allowed between the entered total and the calculated value.

Save and Upload the File

1. Save the completed template file locally.
2. Return to the upload screen.
3. Click **Browse**, select the file, and click **Upload**. The file will be processed by a background job.
4. Once processing is complete, the status will be updated and visible on screen.

Upload Status and Errors

1. Refresh the page to view the upload results summary in the **Upload History** grid. The Upload History includes:
 - a. Job ID
 - b. Upload Date
 - c. File Name
 - d. Status
 - e. Number of Invoices Processed
 - f. Number Saved Successfully
 - g. A link to download the result file

Upload One-Time Payable Invoice

Administration > Upload One-Time Payable Invoice

Instructions: Please follow these steps

1. Click the 'Download Invoice Template' button to get the template
2. Open the downloaded file and fill in the required fields
3. Save the updated Invoice template and upload it using the "Browse & Upload" button

Step 1 [Download Invoice Template](#)

Step 2 Please update the template and click on the browse to select the file from your device

PayableInvoice.xlsx

100%
File uploaded successfully

Upload History

Job Id	Upload Date	File Name	Status	# of Invoices in File	# Saved Successfully	Download Result
10574	11/06/2025	PayableInvoice.xlsx	Queued	NA	NA	<input type="button" value="Cancel"/>
10573	11/06/2025	PayableInvoiceUploadTemplate.xlsx	Cancelled	NA	NA	

Page 1/1 (2/2 rows) Go to:

Audit Logs

Date Time	Job Id	File Name	Log Sequence	Action	Detail
No audit record					

Page 0/0 (0/0 rows) Go to:

2. If the upload is successful, the system displays a success message “n’ invoice(s) updated, saved successfully”.

Handle Upload Errors

1. If errors occur, download the result file to review issues. The result file includes:
 - a. Invoice-level status (success or failure)
 - b. Specific validation errors for each failed row

You can use this file to correct issues and re-upload only the affected rows.

Note: Invoices that were already uploaded successfully will be marked as duplicates and skipped on re-upload.

2. Common errors include:
 - a. Duplicate invoice entries
 - b. Missing mandatory fields (e.g., currency)

Correct and Re-upload

1. Make necessary corrections in the same file.
2. Save the updated file.
3. Repeat the upload process mentioned.
4. Refresh and confirm successful upload.

Audit Logging

1. Each upload and invoice update are recorded with:
 - a. Timestamp
 - b. User details
 - c. Action logs

2. Logs can be accessed in the **Audit Logs** Grid under the same module.

Best Practices

- Always download and use the latest template to ensure compatibility.
- Use the reference (master data) tabs to reduce data entry errors.
- Double-check tax and total amount calculations before uploading.
- Use the result file to review and manage failed uploads efficiently.

Adding Custom Clause to Contract Type

Add Custom Clause at Contract Level

To improve contract standardization and flexibility, Real Estate Manager has introduced a new capability that allows users to define and manage User-Defined Field (UDF) Clauses at the Contract Type level.

The objective of this enhancement is to allow users to predefine reusable UDF clauses at the contract type level, standardizing contract creation, improving clause visibility and control, and enabling enhanced reporting through clause-level data support.

Previously, clauses were manually added to each contract or maintained as ad hoc entries, resulting in inefficiencies, inconsistencies, and missed compliance opportunities. There was no way to configure reusable custom clauses at the contract type level.

Manage Contract Types

Administration > Contract Types

ContractType 20230724141351101

ContractType 20230724161802478

ContractType 20230724142626567

Non-Lease

Exp-15nov

PC_1720_QAprod

Contract-1068

LA significant contract

Non LA Significant contract

Contract-1069

Non LA Significant contract

est-n-contract type

test-2

test-1

Contract-932

Test-932

lease For Clause

Expenditure Lease Clause

Contract-1066

test-contract-custom fields

Contract-940

ACCTREG-940

Contract-999

Test-999

Payable REM-KS Receivable REM-KS **Predefined Contract Clauses** Default Folder Structure

Select from the available pre-defined clauses below by checking the box on the left side of the panel.
 You may also specify whether this clause is a default clause (active and mandatory by default and must be deactivated when editing a contract of this type) or an optional clause (inactive and not mandatory by default and must be activated when editing a contract of this type).
 To add a new clause, Click "Add Custom Clause" field.
 Once a custom clause is added, it cannot be edited or deleted. Please raise a support ticket to add or edit a custom clause field.

Filter clauses:

<input type="checkbox"/> LA640073 - Alterations	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> LA640073 - LA640073	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> LA64007Category - LA64007Clause	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> LA64007Category - LA64007Clause	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Land - Alterations	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Land - Building Density	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Land - Floor Area Ratio	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Land - Height Limit	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Land - Investment Intensity	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Land - New one	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Land - Ratio of Green Area	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> New one - New one	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Property - Alterations	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Property - Assignment/Sublease	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Property - Base Year	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Property - Confidentiality	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Property - Early Termination	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Property - Early termination penalty	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Property - Emergency Generator	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Property - Estoppel	Inclusion: <input type="text" value="Default"/>
<input type="checkbox"/> Property - Go Dark	Inclusion: <input type="text" value="Default"/>	<input type="checkbox"/> Property - Holdover	Inclusion: <input type="text" value="Default"/>

[Add Custom Clause](#)

Add UDF Clauses to Contract Types

Real Estate Manager offers a new “Add Clauses” button under the Predefined Clauses section at the contract type level. UDF clauses created here will automatically be included in all new contracts associated with that contract type.

Clause Creation Modal

Users must enter a **Clause Name** and **Clause Category**. Both are mandatory. The modal validates entries and prevents clause duplication within the same contract type.

Clause Visibility in Contracts

Clause drop-downs now include the following:

- Predefined clauses
- UDF clauses
- Adhoc clauses

Previously selected clauses appear at the top for quick reference.

Editing and Deletion Restrictions

The following are the editing and deletion restrictions:

- UDF clause names cannot be edited once created.
- UDF clauses cannot be deleted to maintain historical integrity.
- Users can update whether a clause is default or optional for new contracts.

Confirmation and Notifications

- A confirmation message appears after successful creation.
- A notification reminds users that changes apply only to new contracts created under the specified contract type.

Reporting Support

UDF clauses are now available in the **Custom Reports > Clauses** data source, enhancing visibility and auditing capability. The new custom clauses will be available in REPIW as well.

Important Notes

Newly created UDF clauses will not apply to existing contracts.

Automated Calculation of Cost per Rentable Area

To support cost analysis and strategic decision-making, Real Estate Manager has introduced a new feature that automatically calculates the Cost per Rentable Area (P.A.) on the contract page. Previously, users had to manually calculate the Cost per Rentable Area, often using offline spreadsheets. This enhancement eliminates manual errors, improves accuracy, and enables meaningful comparisons across properties and portfolios.

The system now calculates the Cost per Rentable Area whenever a contract is saved.

Calculation Logic (Per Line Item)

Cost per Area (PA) = P.A. Cost (Ex/Inc Tax) ÷ Gross Rentable Area

Validation and User Feedback

If the Gross Rentable Area is missing or set to zero, the system will not calculate the Cost per Area and a warning message is displayed: "Warning: Missing Data - Rentable area (Gross) is required to calculate the Cost per Rentable Area P.A. Please enter a value."

The **Cost per Area** field will remain blank until a valid value is provided.

Display and UI Enhancements

The Cost per Rentable Area is now displayed under each cost line item in the contract cost table as a total value at the bottom of the cost section.

Hover Tooltip for clarity

Cost per Area (PA) = P.A. Cost ÷ Gross Rentable Area.

Please ensure that the Gross Rentable Area is configured for this contract. To add it, go to **Administration > Contract Types** and include the custom field for the relevant contract type.

Summary Details Valuations Contracts (1) Apportionments Subdivisions Consent/Approvals Exit Costs Insurance Records Compliance Tasks Files Contractors Budget

View All Payable Contracts > LA_63583

Contract Details Invoices Lease Accounting History Contract Audit Log Subcontracts

Contract Details Unsyncronized - No Lease Accounting Readiness Reviews

Description: LA_63583
 Schedule Number: LA_63583
 Status: Current
 Currency: Australian Dollar
 Contract Type: LA-60919_GRA
 Payable Contract Contract Type: Modified Gross Lease
 Is Partial Building: No
 Landlord: Tenant_07-06-21
 Lessee: Tenant_07-06-21
 Treasury Approver: Treasury Approver
 Net Equivalent Ratio: 1.0000
 Document Templates: Manage Document Templates
 Guarantees: This agreement currently does not have any guarantees.

Assets:

Asset	Primary Asset Status	Actions
LA_63583	Primary Asset	View

Other Clauses:

Category	Name	Section	Current Clause Details	Triggered
No Other Clauses added				

Notes:

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 AUD	\$1,000.00 AUD	\$11,000.00 AUD	Monthly	\$120,000.00 AUD	\$1,200.00 AUD per ac
Total		\$10,000.00 AUD	\$1,000.00 AUD	\$11,000.00 AUD		\$120,000.00 AUD	\$1,200.00 AUD per ac

Files:

Uploaded On	File Name	Description	Expires On	Actions
There are currently no attached files				

LA-60919 Custom Group

Rentable Area (Gross): 100.00ac

Automated Calculation of Cost per Area in Custom Report

Real Estate Manager offers the Custom Report Builder to support automated calculation of Cost per Gross Rentable Area (P.A.), giving property managers a powerful metric to evaluate the cost efficiency of their real estate portfolio. Previously, users could only view total or line-item costs in reports, making it difficult to evaluate cost efficiency across spaces of varying sizes.

This enhancement enables accurate portfolio-level insights by standardizing cost metrics and allowing unit conversions for consistent benchmarking across properties. The dual-column format and automated calculations improve reporting accuracy, clarity, and usability across teams.

Cost per Area (P.A.) in Reports:

Users can now select **Cost Per Area P.A.** as a calculated field when using **Contract data source** and **Asset - Contract data source**. This field can be added alongside **Current - Selected Cost P.A.** for individual cost line items and **Selected Cost P.A. (Total)** for total cost.

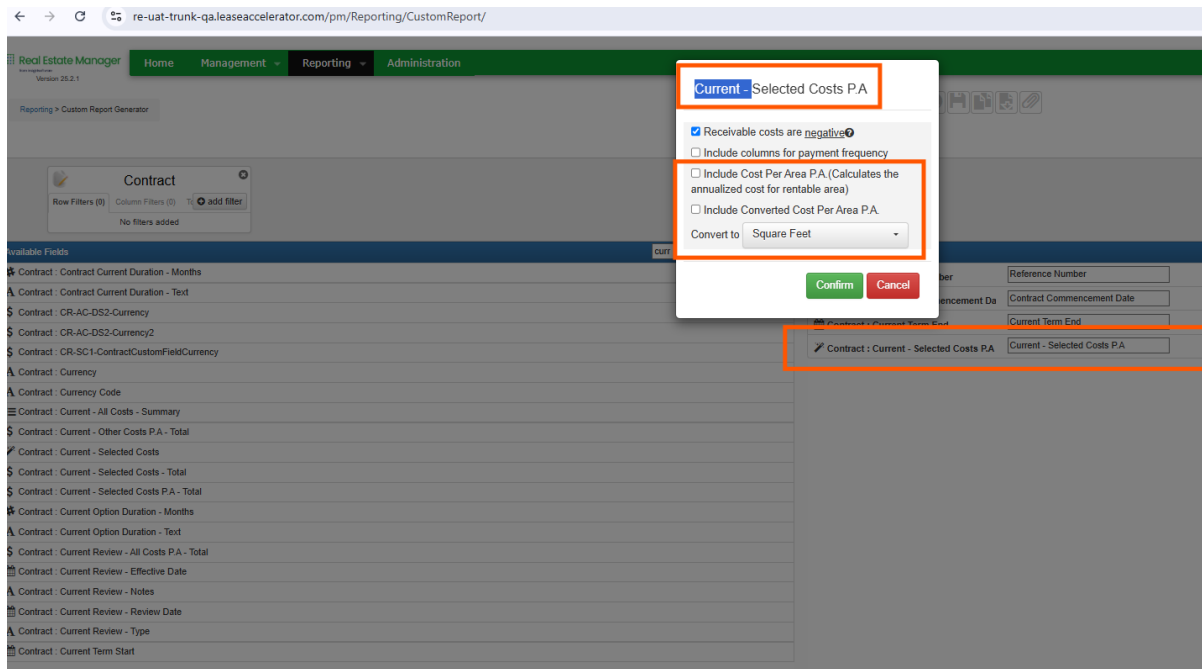
Two-Column Format for Clarity:

Reports display Cost per Area in a two-column format:

- A numeric value (e.g., 85.00)
- A measurement unit (e.g., per Sq Ft, per Sq M)

Unit Conversion Support

Users can choose to convert Cost per Area into a standard unit (e.g., convert per Sq M to per Sq Ft). The system automatically recalculates the numeric value to reflect the converted unit. Both individual and total costs follow this logic to maintain consistency.



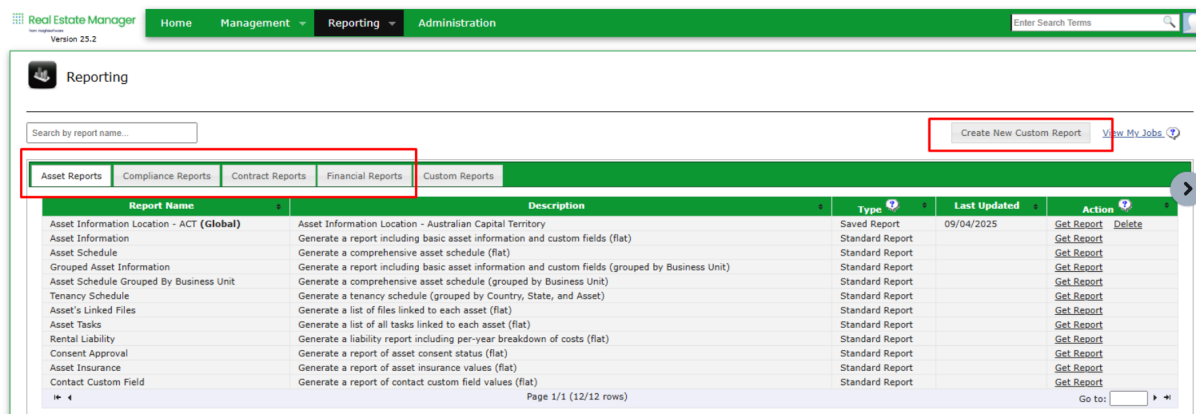
UI/UX Enhancement: Improved Reports Section in Real Estate Manager

Real Estate Manager's Custom Reports page is enhanced to improve usability, consistency, and report management. These updates apply to both standard and custom reports.

Key Improvements

- Unified Grid View: Saved and Standard Reports are now displayed in a single, streamlined grid layout.
- Action Buttons:
 - Saved Reports: Edit, Delete, Export, and Manage Subscriptions
 - Standard Reports: Edit and Export
- New Report Creation: A clearly visible **Create New Custom Report** button opens a blank report builder.
- Tool-tips Added: Hover tool-tips now explain report types and available actions for better guidance.
- Search Bar: Easily find reports by name or type across both saved and standard reports.

- View Job Link: Quickly access the **My Jobs** page to check report processing status and download completed reports.
- My Jobs Tool-tip: Helps users understand where to track and retrieve scheduled reports and jobs.



These enhancements make it faster and easier to manage and track reporting activities in Real Estate Manager.

Enhancement to Contract Type Functionality

Real Estate Manager now allows users to classify leases more accurately with new contract types in the drop-down. These types are now fully supported in REPIW downloads and contract imports, enhancing setup efficiency and compliance.

Expanded Contract Type Options:

Users can now choose from additional contract types in the “Contract Type” drop-down on the Contract Page, enabling more precise classification of leases based on business needs.

REPIW Contract Type Support:

The newly added contract types are now included in the Contract tab of the REPIW download. These types can be selected when setting up a lease and are fully supported during contract import, streamlining data entry and setup.

Important Notes:

Contract Type must be selected during the initial contract setup. Once a contract is synchronized with LAM, the contract type is non-editable for significant contracts, preserving data integrity and ensuring compliance with lease accounting standards.

List of New Contract Types:

The following list of new contract types are added:

- Absolute Lease- Tenant pays all costs including taxes, insurance, and maintenance. Landlord has no responsibilities.

- Base Year Lease - Tenant pays increases in operating costs over a fixed base year amount. Landlord covers base year expenses.
- Double Net Lease - Tenant pays property taxes and insurance; landlord covers maintenance and structural repairs.
- Gross Plus Electric - Tenant pays a fixed rent covering all costs except electricity, which is paid separately.
- Ground Lease - Tenant leases the land and is responsible for building, maintaining, and paying all associated costs.
- Net Lease - Tenant pays rent plus operating costs like taxes, insurance, and maintenance, common in commercial leases.
- Percentage Lease - Tenant pays base rent plus a percentage of sales revenue used primarily in retail leases.
- Single Net Lease - Tenant pays base rent plus property taxes; landlord covers insurance and maintenance.

The screenshot shows the 'Real Estate Manager' software interface, version 25.2.1. The top navigation bar includes 'Home', 'Management', 'Reporting', and 'Administration'. The main content area is a form for configuring a lease. On the left is an 'Action Panel'. The form fields include:

- Current Asset(s)(*):** A table with columns 'Primary Asset Status' and 'Asset'. It shows one entry: 'Primary Asset' with asset ID '550_1' and an 'Edit' link. Below the table is a link 'Add Asset to Schedule'.
- Landlord(*):** A text input field containing 'Unknown Contact' with search and refresh icons.
- Lessee Δ:** A dropdown menu showing '- not set -' with search and refresh icons.
- Treasury Approver Δ:** A dropdown menu showing '- not set -' with search and refresh icons.
- Lease Accounting Contract Type(*):** A dropdown menu with a search icon. A list of options is displayed: 'Select lease type', 'Absolute Lease', 'Base Year Lease', 'Double Net Lease', 'Gross Plus Electric', 'Ground Lease', 'Modified Gross Lease', 'Net Lease', 'Percentage Lease', and 'Single Net Lease'.
- Is Partial Building:** A checkbox.
- Notes:** A text area.
- Guarantees:** A text area with the word 'Guarantees.' visible.
- Files:** A text area.

At the bottom of the form are three sections: 'Incentives', 'Initial Costs', and 'Make Good Costs', each with a text area.

Other Improvements

UI Enhancements - Contract and Asset Page

Accordions for Custom Fields:

Added accordions to the Asset and Contract detail sections, ensuring that custom fields and additional information are initially collapsed. This helps reduce visual clutter and makes it easier to navigate the data.

Improved Label Formatting:

All labels are now bold with a semicolon, and spacing between lines is increased for a cleaner, more readable layout.

Enhanced Table Alignment:

Tables on the Contract page are now better aligned, providing a more organized view.

Copy Clause Details:

Introduced a clipboard icon for contract clauses, allowing users to easily copy clause details for sharing via email or messages.

Collapsible Accordions on Contract Page

Real Estate Manager has added collapsible accordions to the contract page for key sections including Incentives, Initial Cost, Make Good Cost, Break Termination Penalty, and Break Clause. By default, all accordions will be collapsed, allowing users to expand only the sections they wish to review. This change improves page readability and reduces visual clutter for a more streamlined experience.

Minor Improvement - Bug Fix with Critical Dates Report

Real Estate Manager has resolved an issue in the Critical Date Report where the system was incorrectly displaying the exercise window for the second renewal term instead of the first, causing confusion around upcoming lease actions. In cases where contracts include multiple renewal options, the report previously defaulted to showing the second renewal's exercise window, which did not align with expected behavior.

The logic is now corrected to ensure that the exercise window for the first renewal term is displayed, helping users focus on the earliest actionable renewal and enabling timely decision-making and follow-up.

This fix improves the accuracy of the Critical Date Report by ensuring that users are alerted to the next immediate renewal window, supporting better lease management and reducing the risk of missed renewal deadlines.