



Release Notes

Real Estate Manager

Version 25.1.1



Document Information

Notices

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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.

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25.1.1 Release Notes

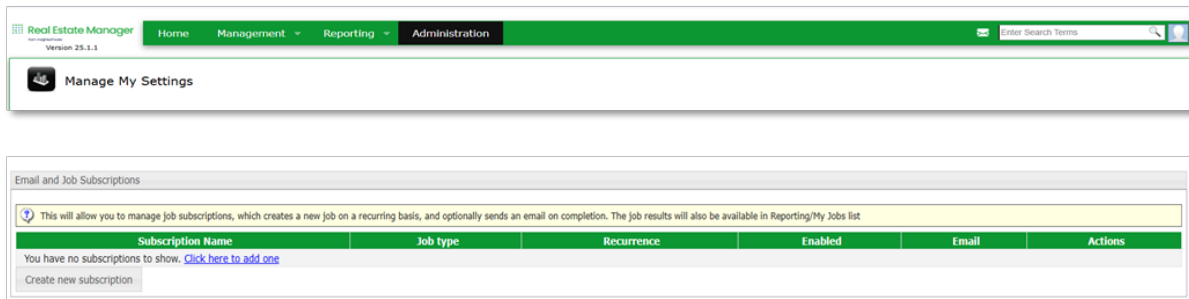
New Feature

Subscription Management – Email Digest

Real Estate Manager introduces a new feature that allows users to schedule and manage recurring jobs for the **Critical Dates Digest**. This is the only supported job type for this release, providing a flexible approach to receiving automated critical date notifications.

Subscription Interface

- Accessible from **My Settings**, where the previous “Subscribe/Unsubscribe” toggle for Critical Dates has been replaced with a subscription management interface.
- Users can view a list of current subscriptions, add new ones, edit existing ones (e.g., change schedule, enable/disable, or set email preferences), and delete those no longer needed.



Scheduling and Notifications

- **Frequency:** Set how often the digest runs by choosing “every X Day” or “every X month,” and specify a “Next Due” date and time.
- **Immediate Runs:** If the chosen date/time is in the past, the job runs immediately, then moves to the next interval.
- **Send Email:** Check the “Send Email” box to receive the digest at your email address. The email cannot be sent to any additional recipients at this time.
- **Enabling Subscriptions:** Click “Enabled” to trigger the Critical Dates Digest report. You can then find the generated report under My Jobs.

Edit Subscription

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.
Date/Time is specified in timezone "(UTC-05:00) Eastern Time (US & Canada)", currently Friday 21/02/2025 00:01.

Subscription Type

Critical Dates Digest

Job Name

Critical Date 90 days

Frequency

Every1Months

Next Due

01/03/2025 at 7:30

Send Email

☒ (sent to kseghal@ezlease.com)

Enabled

☒

Save

Cancel

Editing, Deleting and Adding Subscriptions

- **Add New Subscription:** Create a new recurring job for the Critical Dates Digest.
- **Edit/Delete Existing:** Adjust scheduling, enable/disable, or remove any existing subscription.
- **Critical Dates Only:** Currently, the users can subscribe only for the Critical Dates Digest job type.

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
Critical Date 90 days	CriticalDatesDigest	Saturday 01/03/2025 07:30 then every 1 Months	Enabled	kseghal@ezlease.com	Edit Delete
Create new subscription					

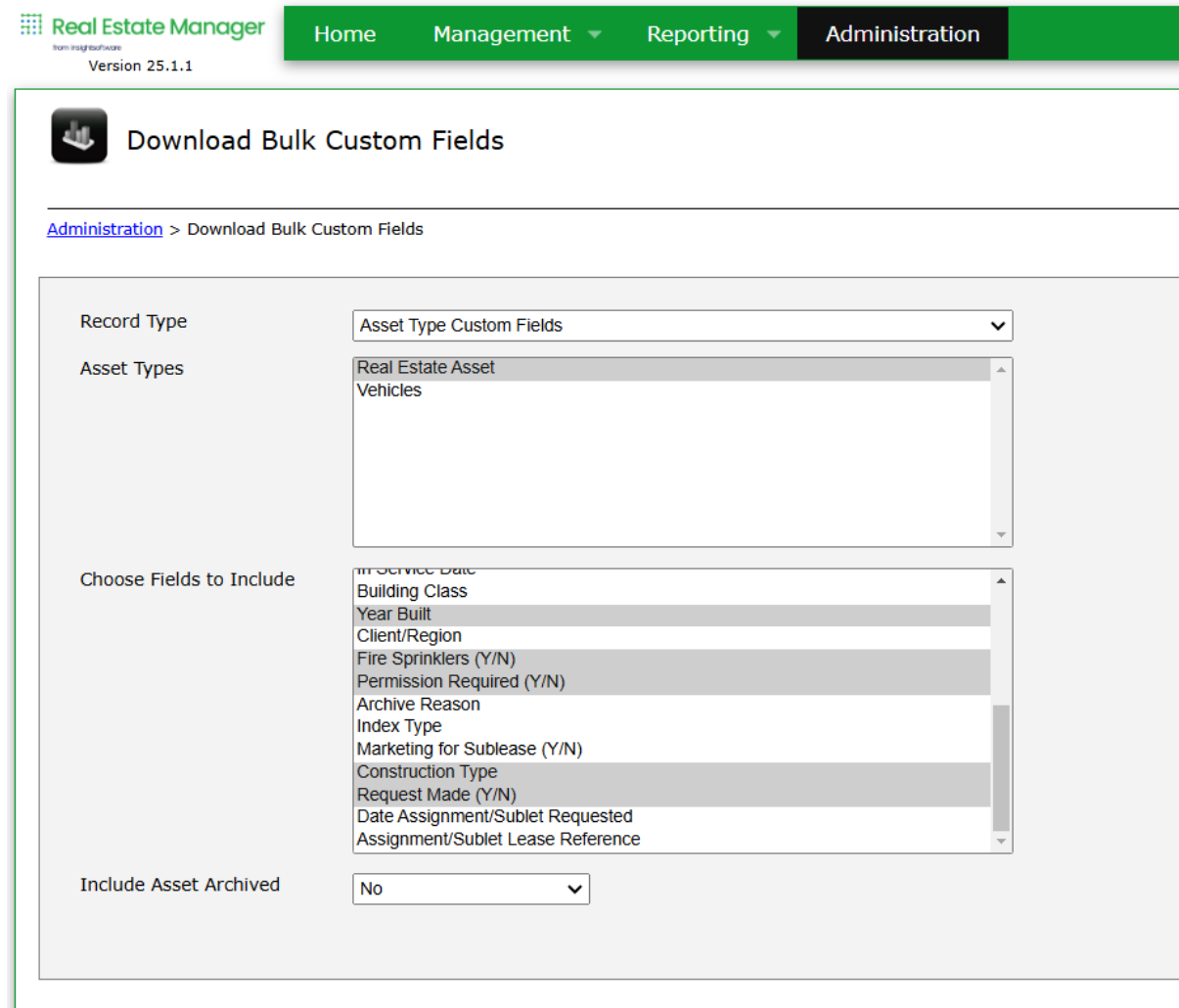
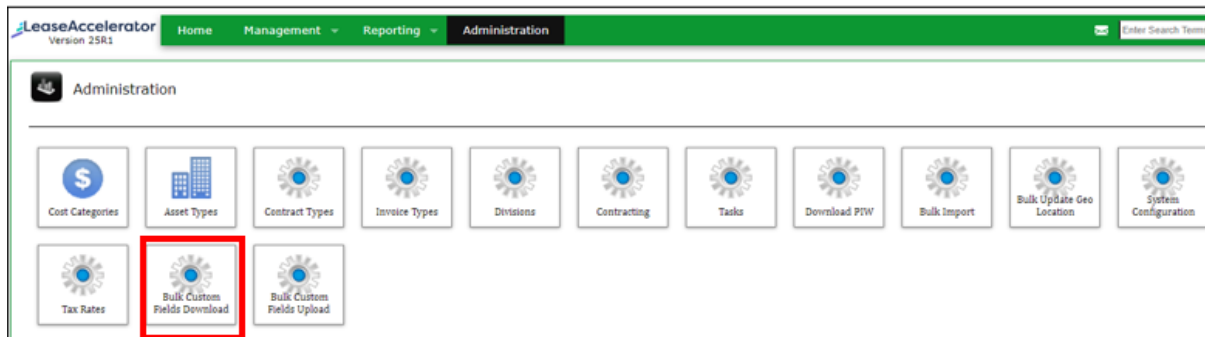
Bulk Download and Upload of custom field for Assets

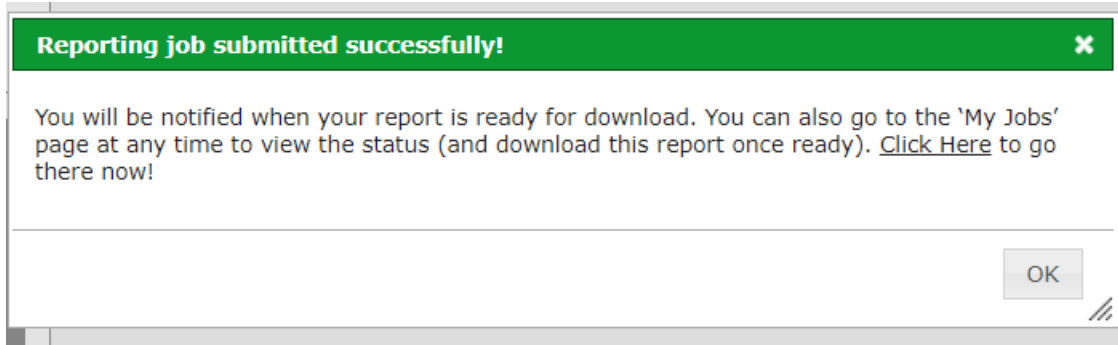
Real Estate Manager now offers a convenient way to bulk download and bulk upload custom fields for Assets. Users can download and upload the following custom field types in bulk:

- Text
- Number
- Date
- Yes / No
- Lookup
- Decimal

Downloading Custom Fields:

- Navigate to **Administration > Bulk Custom Fields Download**.
- Filter the selection by choosing specific invoice types, custom fields, and invoice date range.
- Click on **Download**. The report will be available under **My Jobs**.



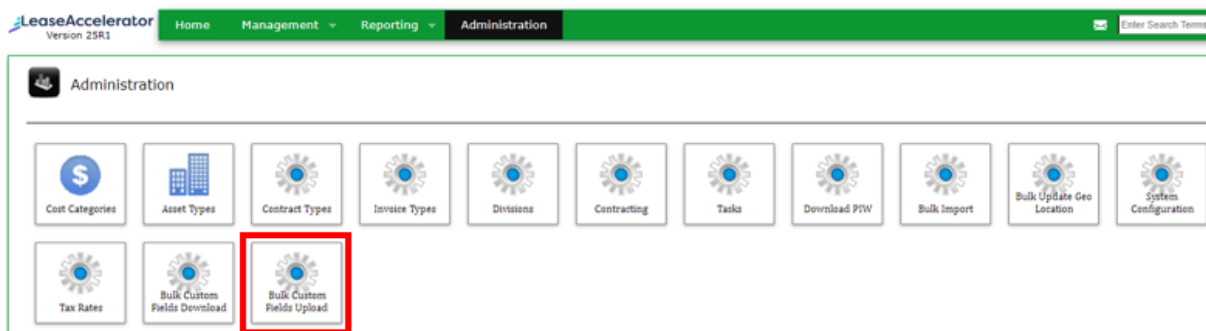


Reviewing and Editing Custom Fields:

- Review the custom fields in the downloaded template.
- Edit, update, or delete the existing values of custom fields as needed.
- Save the file.

Uploading Custom Fields:

- Upload the edited file via Administration > Bulk Custom Fields Upload.
- Check the status of the upload under My Jobs.



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Home Management Reporting Administration

Upload Bulk Custom Fields

Administration > Upload Bulk Custom Fields

Please browse the excel file that you wish to use to upload Bulk Custom Fields in the system.

Asset Type Custom Fields
BulkDownloadAssetTypeCustomField
Browse ...

100%
File uploaded successfully

Reporting job submitted successfully!

You will be notified when your report is ready for download. You can also go to the 'My Jobs' page at any time to view the status (and download this report once ready). [Click Here](#) to go there now!

OK

Post-Upload Review:

- Download the file from **My Jobs** to review all custom fields in the updated file.
- If there were errors in updating the custom fields, the reasons for the errors will be available in the file. This helps users understand why the upload failed for certain custom fields and takes appropriate action. (Below is a sample of the file post uploading.)

My Jobs

This Job section allows you to view the status of any jobs that have been scheduled by you, such as reports. If applicable to the job, when the Job Status is "Completed" you can download the generated file.
NOTE: To Update the Status of your Reports, please Refresh this window.
Times are shown in Eastern Standard Time, the current time is Friday 21/02/2025 00:43

Job Filters

Job Type: Please Select Job Type
Job Status: Please Select Job Status
In the Last: 1 Days
Filter

ID	Job Name	Date Submitted	Job Type	Status	Download
15409	BulkUpdateAssetTypeCustomFields	Friday 21/02/2025 00:37	Report	Completed	Download Cancel

	D	L	M	N	O	P	Q
1	AssetType	Construction Type	Year Built	Fire Sprinklers (Y/N)	Permission Required (Y/N)	Request Made (Y/N)	Result
2	Real Estate Asset		1993	Yes	Yes	Yes	Pass
3	Real Estate Asset		1996	Yes	Yes	Yes	Pass
4	Real Estate Asset		1992	Yes	Yes	Yes	Pass
5	Real Estate Asset		2007	Yes	Yes	Yes	Pass
6	Real Estate Asset		2009	Yes	Yes	Yes	Pass
7	Real Estate Asset		2008	Yes	Yes	Yes	Pass
8	Real Estate Asset						Pass

Other Improvements

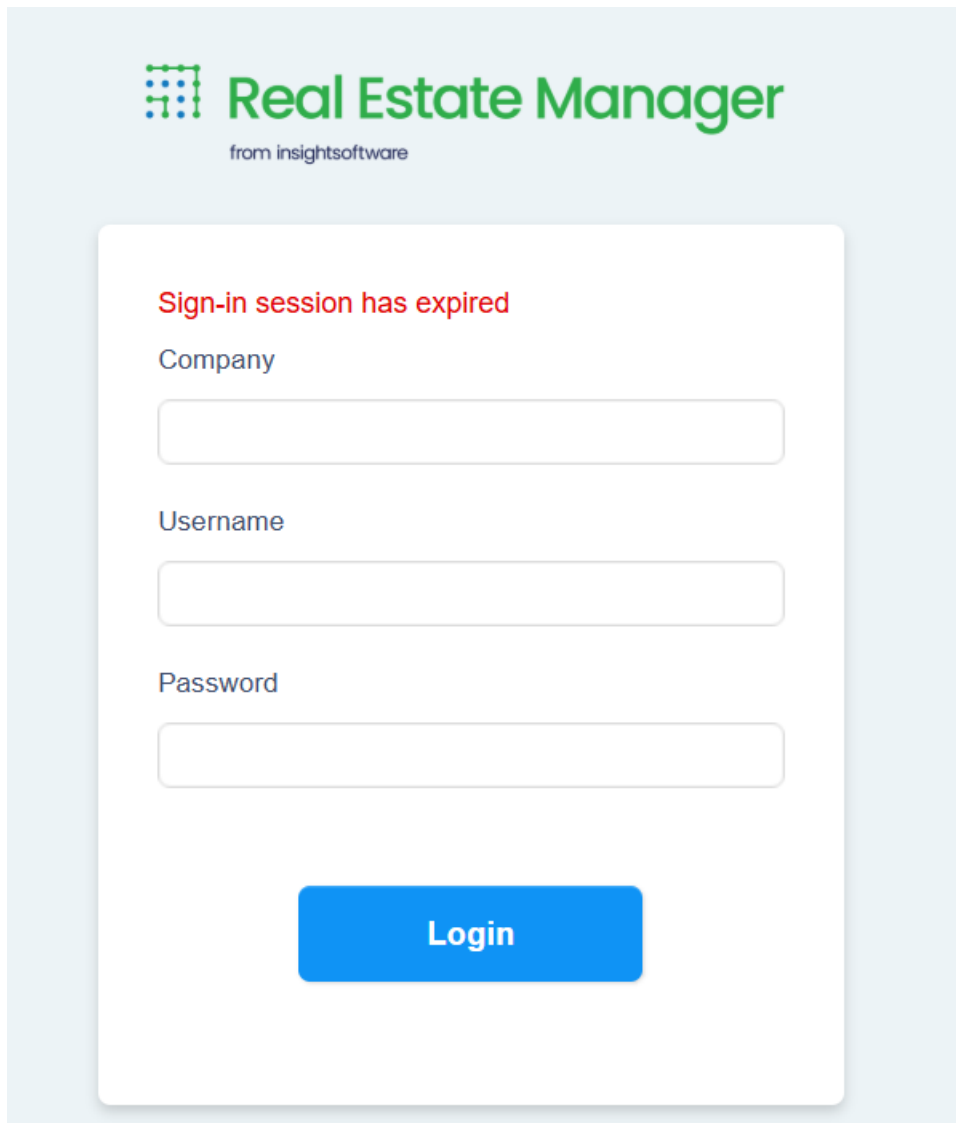
One-Off and Monthly Invoice Reports

The Real Estate Manager has resolved an issue that caused Excel files to become corrupt or improperly formatted when users saved both One-Off and Monthly Invoice Reports. Now, when users save these standard reports with their existing templates and generate Excel files, the output remains properly formatted, uncorrupted, and fully functional. However, if new fields are added to the report or the order of existing fields is altered for these standard reports, users must update the associated templates. Note to

users: If you have created a custom report and attached a template to that saved custom report, you must also update and re-upload the template whenever you add or reorder fields. This ensures the template remains aligned with your custom report configuration.

Updated Logo and Branding

Real Estate Manager has refreshed its logo on the login page and throughout the application to align with its parent company, Insightsoftware. This change ensures a consistent and unified brand identity across all user touchpoints.

A screenshot of the Real Estate Manager login page. At the top, the logo features a green grid icon followed by the text "Real Estate Manager" in green, with "from insightsoftware" in smaller grey text below it. The main content area is a white card with a red error message "Sign-in session has expired". Below this are three input fields labeled "Company", "Username", and "Password". At the bottom of the card is a blue "Login" button.

Real Estate Manager
from insightsoftware

Sign-in session has expired

Company

Username

Password

Login

Vendor Report Generation – Support for Blank Payee Codes and Missing Currencies

Real Estate Manager now correctly manages scenarios where vendors have blank Payee Codes or missing currency assignments when generating the Vendor Report. Previously, if any vendor had a currency assigned but no Payee Code, the report would fail. With this update, the report displays a blank Payee Code for such vendors, allowing successful generation and review of vendor details. In addition,

if a vendor lacks both currency and Payee Code (but holds a vendor role), the system will also display these fields as blank without causing any errors.

Synchronization Improvement – Contract starting in non-first day of the month.

Real Estate Manager now ensures the correct handling of leases that starts on any day other than the first of the month when syncing with the Lease Accounting Manager. Users can set up, synchronize, and perform lease variations on these leases, with all data accurately transferred and recorded.

Synchronization logs provide detailed insights into each update, while invoices are generated correctly in Real Estate Manager to ensure proper payments to vendors.