



TemplaCMS Newsletter

V6.1.0 | Update 2024.09 | September 2024

COMMERCIAL STATEMENT

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INTRODUCTION

This document details changes made to TemplaCMS and features added this month as an update release following the formal release of version 6.1.0.

All menu paths provided are based on the standard UK menu structure, as such certain options may be found in different locations where the menu navigator has been altered by the client.

Training

Note: Where new functionality has been introduced, it is imperative that a full understanding of the implications for set-up and use are resolved by the client.

In some instances, where the new functionality is minimal, the TEAM Software Customer Success Manager can cover this with the client. However, where the functionality is not minimal or has implications elsewhere in the system, training must be provided by the TEAM Software implementation team to the client, a note to this effect will be added to the relevant sections.

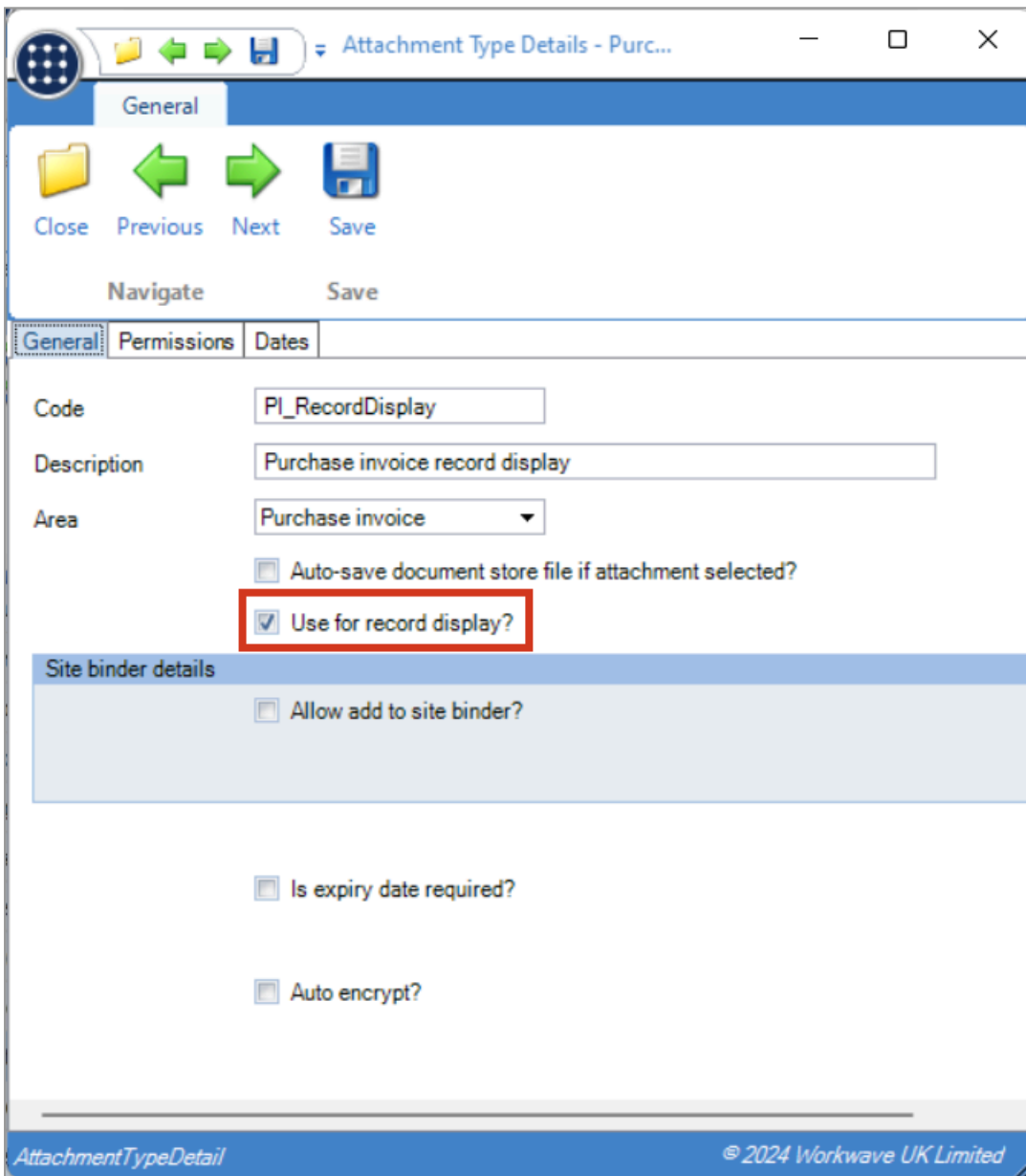
PURCHASE INVOICE HEADER DOCUMENT THUMBNAIL

Background

Various objects across TemplaCMS allow an image to be displayed, whether as a thumbnail on the main tab or on an image tab. Purchase invoice headers now allow a thumbnail to be displayed on the main tab.

Attachment Types

Attachment types of area Purchase invoice can now be flagged as **Use for record display?**



The screenshot shows a web browser window titled "Attachment Type Details - Purc...". The browser's address bar and navigation buttons (Close, Previous, Next, Save) are visible at the top. The page has a blue header with the word "General" and a navigation bar with "Close", "Previous", "Next", and "Save" buttons. Below the navigation bar, there are three tabs: "General", "Permissions", and "Dates". The "General" tab is active and contains the following fields and options:

- Code:** PI_RecordDisplay
- Description:** Purchase invoice record display
- Area:** Purchase invoice
- Auto-save document store file if attachment selected?
- Use for record display? (This checkbox is highlighted with a red border in the original image)

Below these fields is a section titled "Site binder details" with a light blue background, containing the option:

- Allow add to site binder?

At the bottom of the form, there are two more options:

- Is expiry date required?
- Auto encrypt?

The footer of the page contains the text "AttachmentTypeDetail" on the left and "© 2024 Workwave UK Limited" on the right.

Purchase Invoices

When a purchase invoice header is opened, the relevant attachment types are checked and the first flagged as **Use for record display?** is then used to find the latest document store file on the attachment type. If an image, this is then displayed on the purchase invoice to the right of the lines grid.

Clicking on the thumbnail image of the purchase invoice requests windows to open the file using its default viewer for the file type.

WORKBILL COST AND PRICE WORKFLOW

Background

New workflow rules have been added for workbill approval and workbill quote approval workflow paths to allow routing of workbills based on entered cost and price.

Workflow Paths

On workflow paths of type **Workbill approval** and **Workbill cost approval**, two new rule types of **Workbill-cost between** and **Workbill price between** are now available.

Description	Check type	Check percentage	Check min value	Check max value
Wb cost <= 999.99	Workbill-cost between	0.00%	£0.00	£999.99
Wb cost 1000 - 1999.99	Workbill-cost between	0.00%	£1,000.00	£1,999.99
Wb cost >= 2000	Workbill-cost between	0.00%	£2,000.00	£0.00
Wb price <= 999.99	Workbill-price between	0.00%	£0.00	£999.99
Wb price 1000 - 1999.99	Workbill-price between	0.00%	£1,000.00	£1,999.99
Wb price >= 2000	Workbill-price between	0.00%	£2,000.00	£0.00

Workbill Approval

When a workbill or workbill quote is sent for approval and one of the new rules exists on a workflow path's stage, the workbill is checked to see if the cost or price falls between the rule value range. If so, the workbill is routed to the appropriate authorising user.

PLANNED BANK HOLIDAYS IN HOLIDAY TRANSACTION LIST

Background

While an employee's holiday summary card shows a count of future Bank holidays, these have not been visible on the Holiday Transactions drilldown window. These future bank holidays are now visible on this drilldown.

Employee Holiday Transactions

When drilling into holiday transactions from an employee's holiday card in a UK payroll environment, **Future bank holiday** transactions are now visible on the list.

State	Employee	Holiday	Contract	Qty	Unit	Task	Dated	Description
Future bank holiday	20002	2025	QUAR	-1.0000000	Days	0	25/08/2025 0	Future bank holiday
Future bank holiday	20002	2025	QUAR	-1.0000000	Days	0	25/12/2025 0	Future bank holiday
Future bank holiday	20002	2025	QUAR	-1.0000000	Days	0	26/12/2025 0	Future bank holiday
Calculated entitlement	20002	2025	QUAR	28.0000000	Days	0	01/01/2025 0	(7 * 5.6 = 39.2 CAPPED (28.00/52)*(52) = 28)
				25.0000000				

LOG NUMBERS

This enhancement update contains the following log numbers:

WI4199

WI4367

WI4368



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.