TEAM Software
by **WORKWAVE**

TemplaCMS Newsletter

V6.1.0 | Update 2024.09 | September 2024

COMMERCIAL STATEMENT

This document is subject to any terms as per teamsoftware.com/legal.

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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.
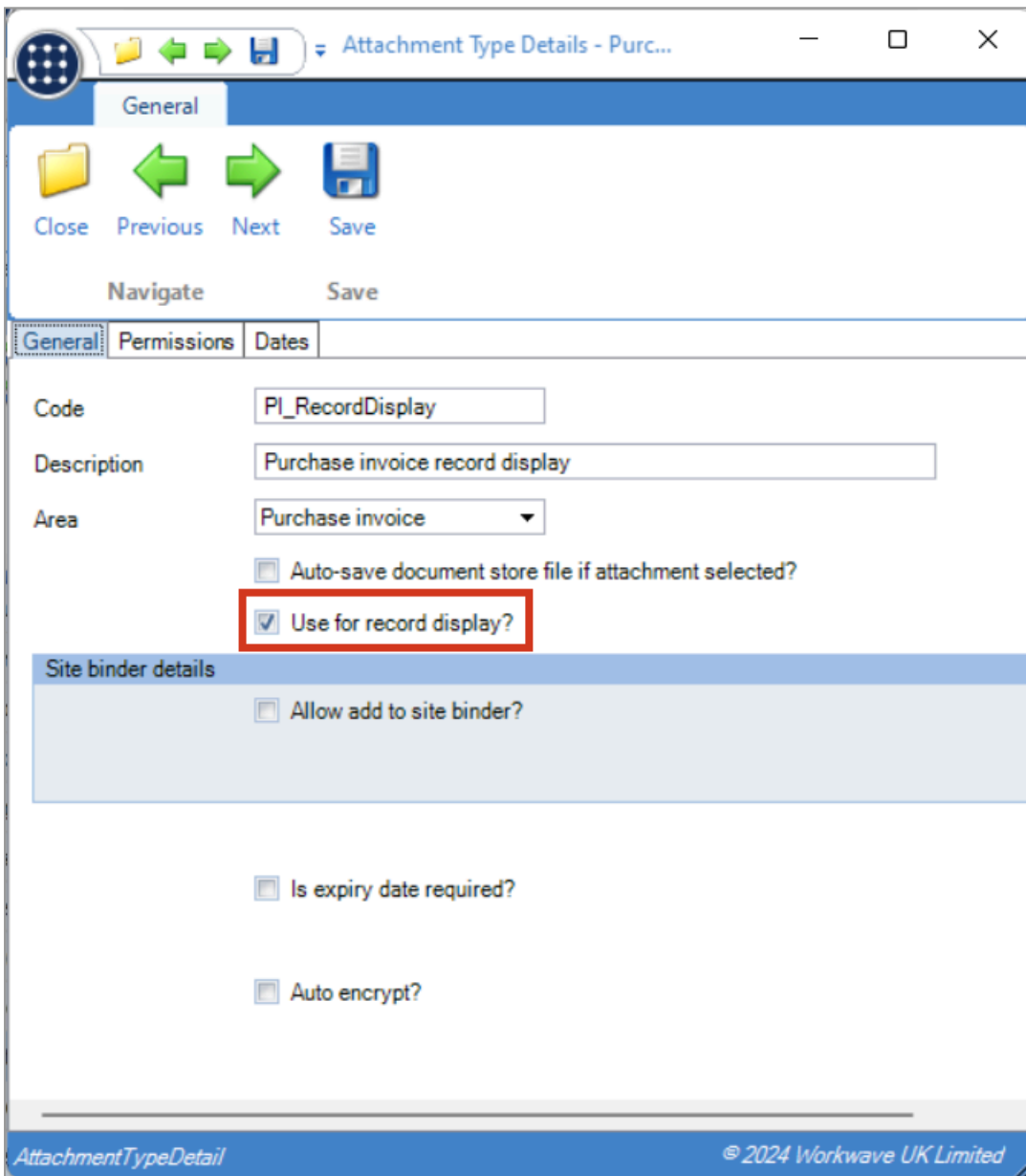
PURCHASE INVOICE HEADER DOCUMENT THUMBNAIL

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?**

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.

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.

Log Numbers

This enhancement update contains the following log numbers:

WI4199

WI4367

WI4368

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