TemplaCMS Newsletter

V6.1.0 | Update 2025.06 | June 2025

COMMERCIAL STATEMENT

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Table of Contents

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.

Stores Order Export CSV Contact Details

For suppliers with whom e-trading is in use, the CSV order export has now been expanded to show the below additional columns:

- Contact Name
- Contact Phone
- Contact Mobile
- Contact Email Address

These columns are populated with details relating to the **ordered by** user if specified on the stores order.

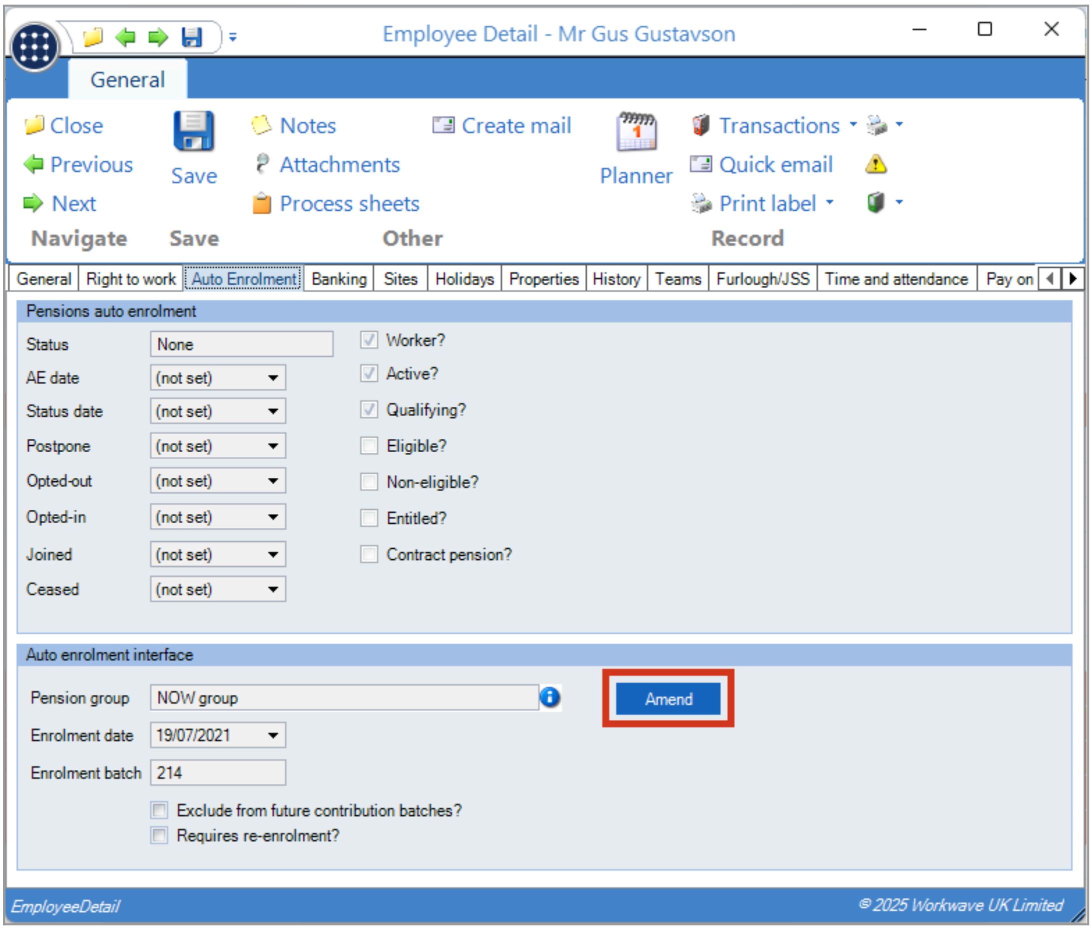
Employee Enrolled Pension Group Change

Background

Once an employee has an enrolled pension group assigned, it is not possible to move them to another pension group. The ability to move an employee to another pension group has been added.

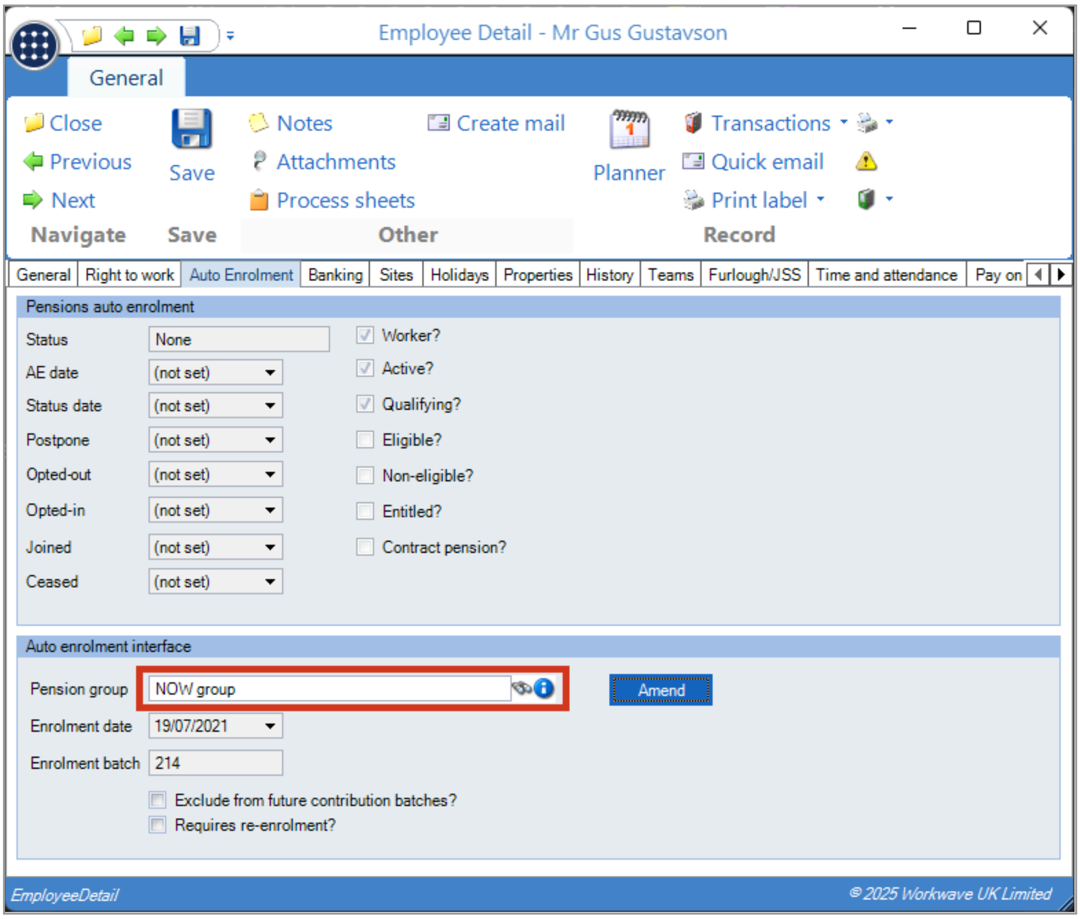
Employee Details

A new button has been added to the Auto enrolment interface section of the Auto Enrolment tab.



Visibility of this button is controlled by a new Employee.AutoEnrolledPensionGroupAmend function.

When clicked, the Pension group can be changed.



The user can now select a new pension group, and on doing so, the ***Requires re-enrolment*** option will be selected automatically. Upon saving the employee with the new pension group, the employee will be eligible for inclusion in subsequent Pension Enrolment and Pension Contribution batches for the new pension group.

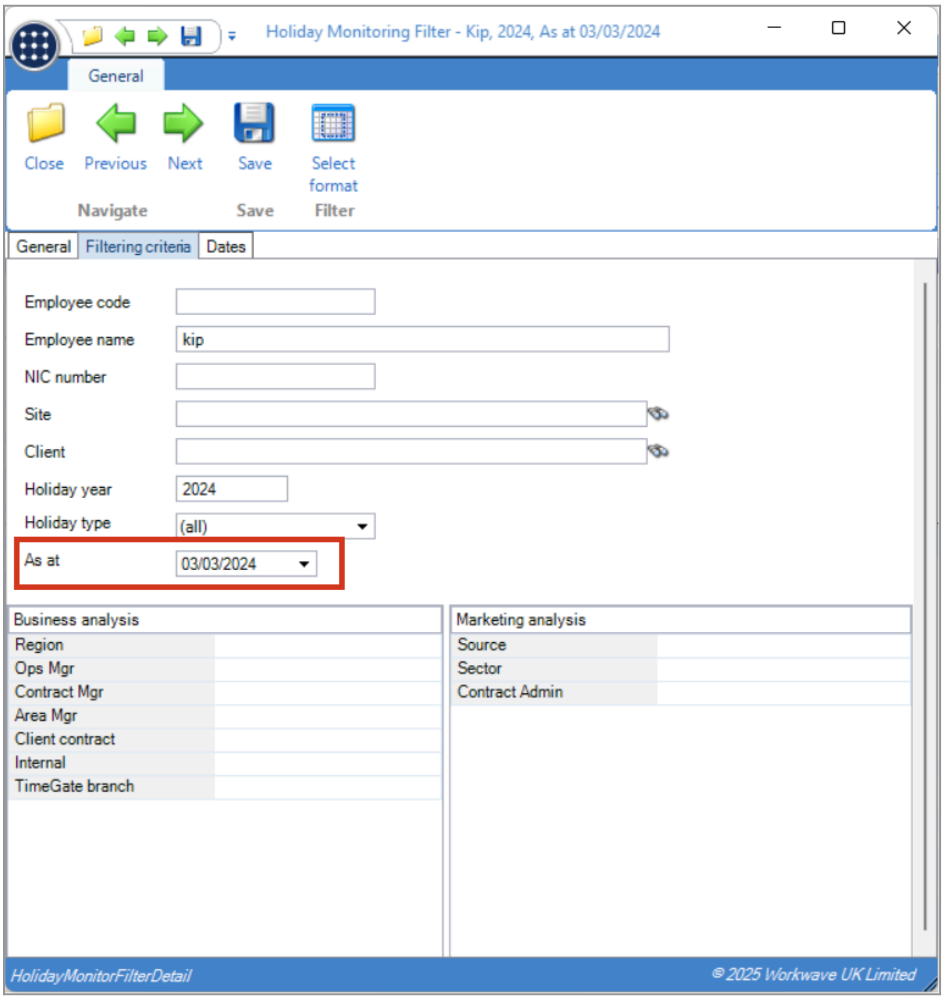
Holiday Monitoring Filter As At Date

Background

The ability to enter an “As at” date on the holiday monitoring filter has been added. By entering an as at date, holiday monitoring can now be used to view the state of entitlement and usage at any point in time.

Holiday Monitoring

A new “As at” date has been added to the holiday monitoring filter.



When this date has been added it is used in the build of the holiday monitoring summary list. Additionally, this date is applied to the transactions drill-down when opened, so any transactions beyond the entered date are excluded.

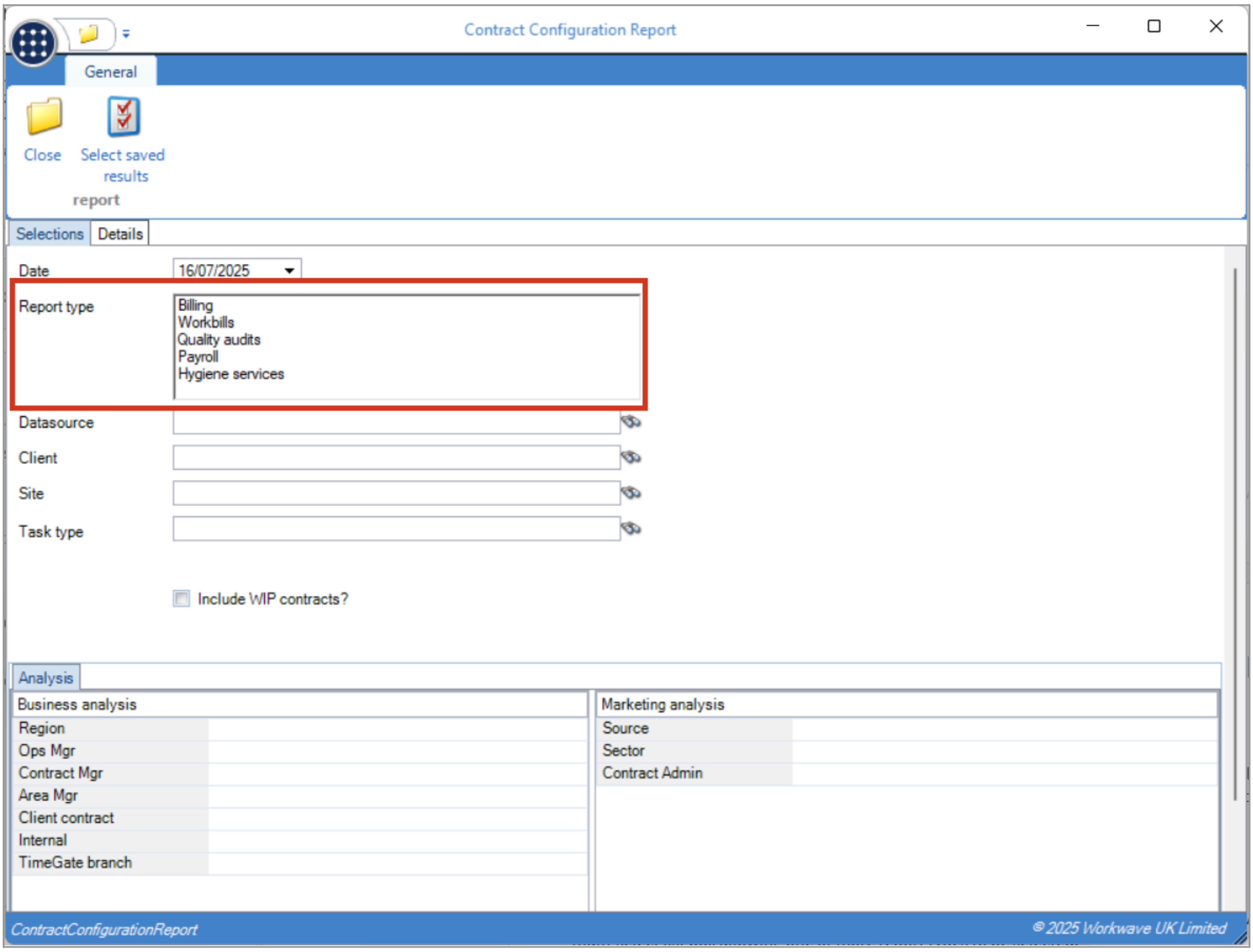
Consolidated Contract Configuration Report

Background

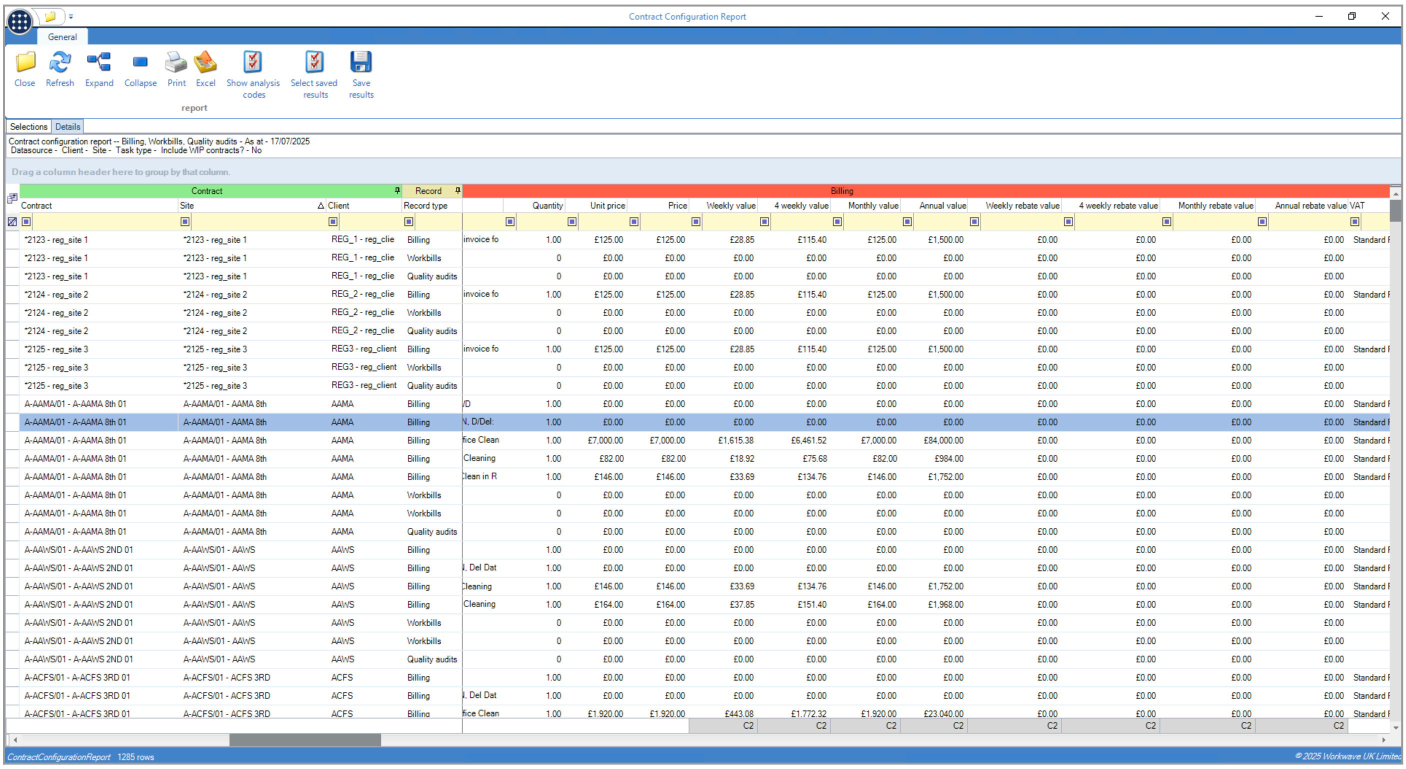
The contract configuration report allows a single report type to be selected, with all the details from that report type shown across the various contracts relevant to the other selection criteria. It is now possible to select multiple report types to be shown at once, allowing multiple contract details to be shown in one report.

Contract Configuration Report

On the Selections tab of the Contract configuration report, the existing Report type drop-down menu has been replaced with a multi-select list box allowing one or more report types to be selected.



When run, the report then builds together the selected report type details, showing common Contract details, a Report type indicating the type of row visible within a Record group, and then the various columns for each selected report type. One row then plots for each record type for the report details. The resulting data can then be grouped and sorted as required.



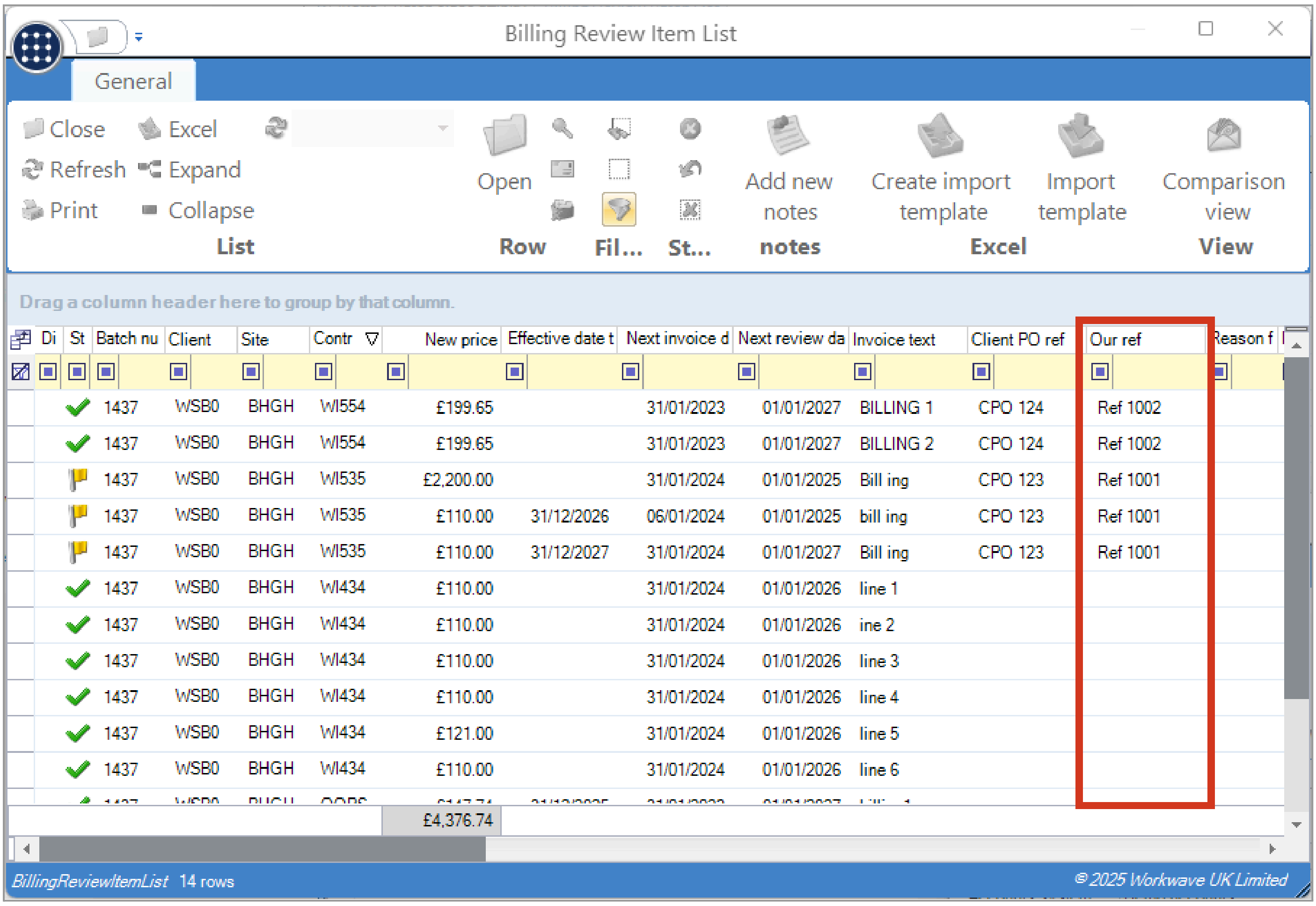
Billing Review

Background

The Billing Review process has been enhanced to allow maintenance of the Our ref field on Contract Billing lines.

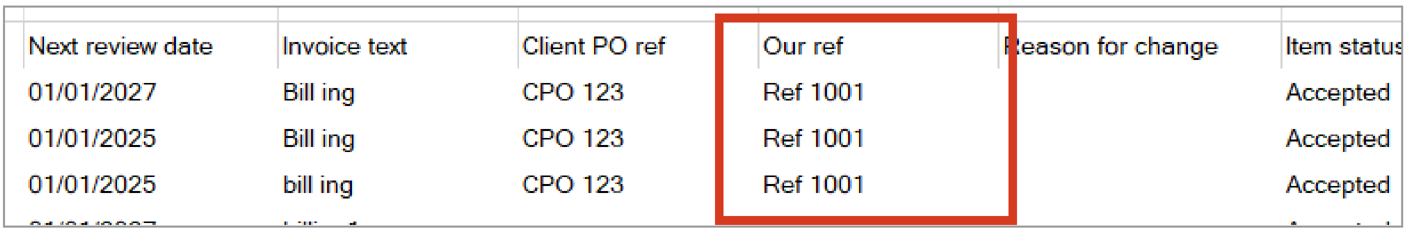
Billing Review Batch

The Our ref column has been added to the Billing Review Item List. On generation of the batch, the column will be populated with the detail from the Contract Billing line.



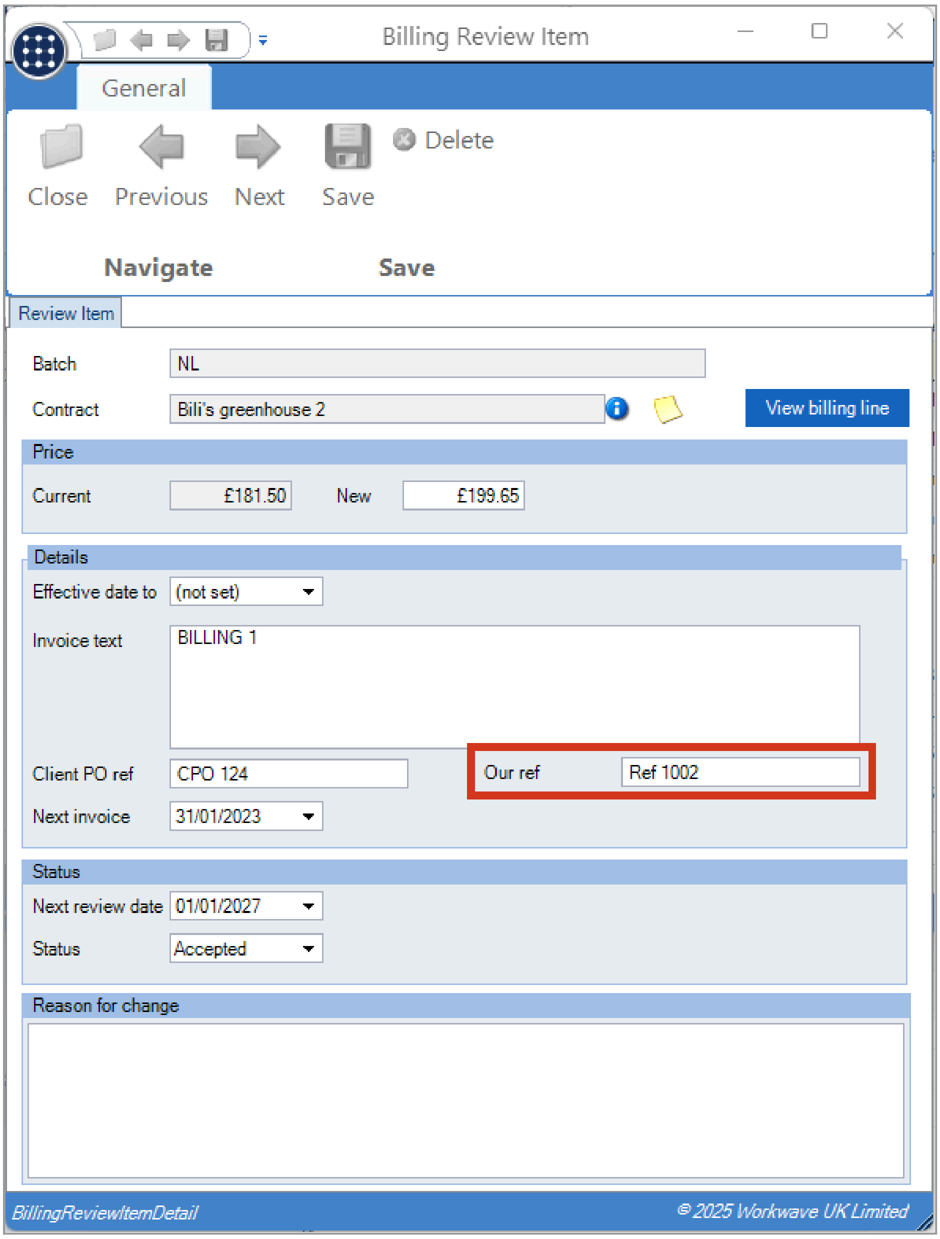
Di	St	Batch nu	Client	Site	Contr	New price	Effective date t	Next invoice d	Next review da	Invoice text	Client PO ref	Our ref	Reason f
		1437	WSB0	BHGH	WI554	£199.65		31/01/2023	01/01/2027	BILLING 1	CPO 124	Ref 1002	
		1437	WSB0	BHGH	WI554	£199.65		31/01/2023	01/01/2027	BILLING 2	CPO 124	Ref 1002	
		1437	WSB0	BHGH	WI535	£2,200.00		31/01/2024	01/01/2025	Bill ing	CPO 123	Ref 1001	
		1437	WSB0	BHGH	WI535	£110.00	31/12/2026	06/01/2024	01/01/2025	bill ing	CPO 123	Ref 1001	
		1437	WSB0	BHGH	WI535	£110.00	31/12/2027	31/01/2024	01/01/2027	Bill ing	CPO 123	Ref 1001	
		1437	WSB0	BHGH	WI434	£110.00		31/01/2024	01/01/2026	line 1			
		1437	WSB0	BHGH	WI434	£110.00		31/01/2024	01/01/2026	ine 2			
		1437	WSB0	BHGH	WI434	£110.00		31/01/2024	01/01/2026	line 3			
		1437	WSB0	BHGH	WI434	£110.00		31/01/2024	01/01/2026	line 4			
		1437	WSB0	BHGH	WI434	£121.00		31/01/2024	01/01/2026	line 5			
		1437	WSB0	BHGH	WI434	£110.00		31/01/2024	01/01/2026	line 6			
						£4,376.74							

In Value type review batches, the Our ref column has been added to Excel Import Template, allowing bulk update of the review items.



Next review date	Invoice text	Client PO ref	Our ref	Reason for change	Item status
01/01/2027	Bill ing	CPO 123	Ref 1001		Accepted
01/01/2025	Bill ing	CPO 123	Ref 1001		Accepted
01/01/2025	bill ing	CPO 123	Ref 1001		Accepted

In Value type batches, the new Our ref field has been added to the detail screen, where it can be updated.



Upon posting of the batch, the Our ref field on the Contract Billing line is updated with the value on the review item.

Migration Wizard – Contract Billing

A new column has been added to the Contract Billing import template for Our ref.

AG	AH	AI	AJ
Invoice run type code	Client po ref	Our ref	Is mandatory stores order po ref ?

.

This field is optional.

Workbill Review

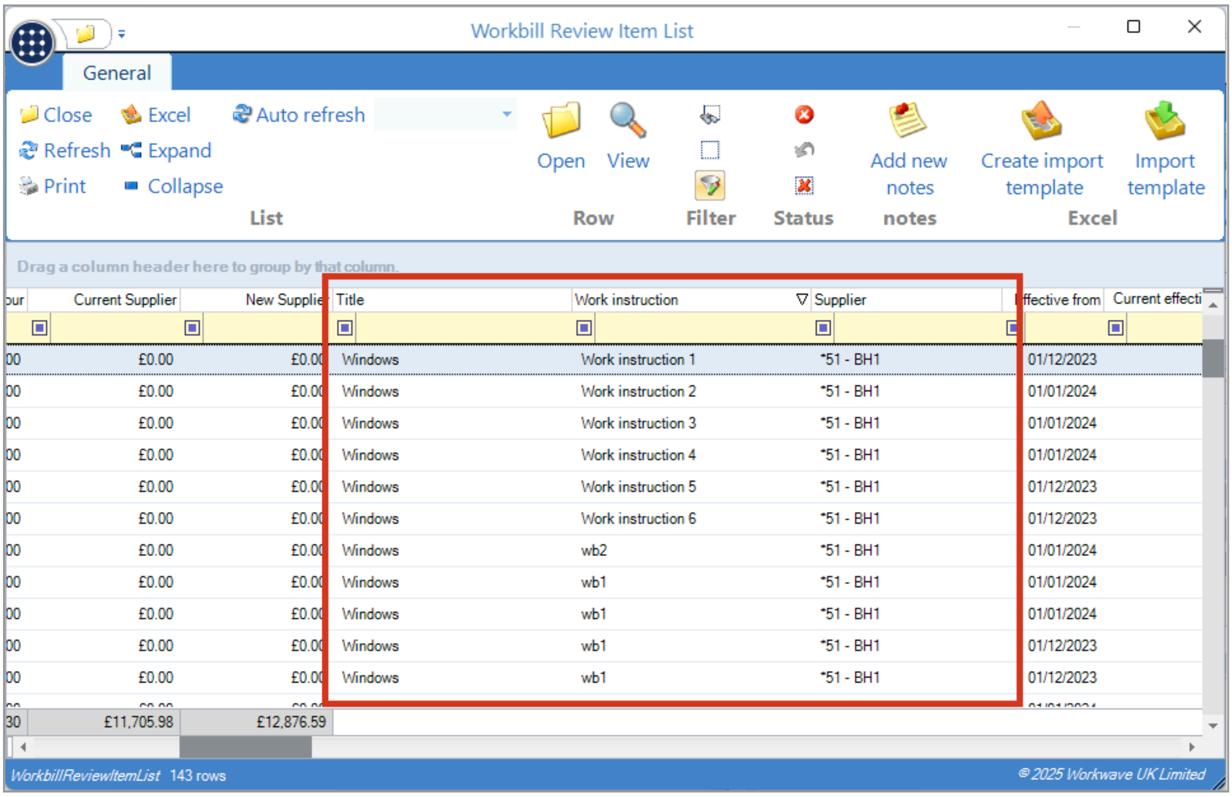
Background

The Workbill Review batch process has been enhanced to allow maintenance of Title, Work instruction, Supplier and Subcontract data on Contract Workbill lines.

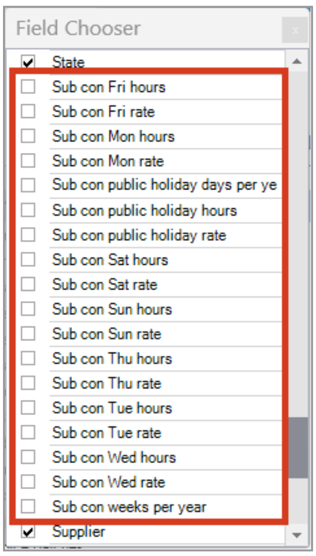
Workbill Review Batch

Workbill Review Items List

New columns have been added to the Workbill Review Item List for Title, Work instruction and Supplier. On generation of the batch, the columns will be populated with the detail from the Contract Workbill line.

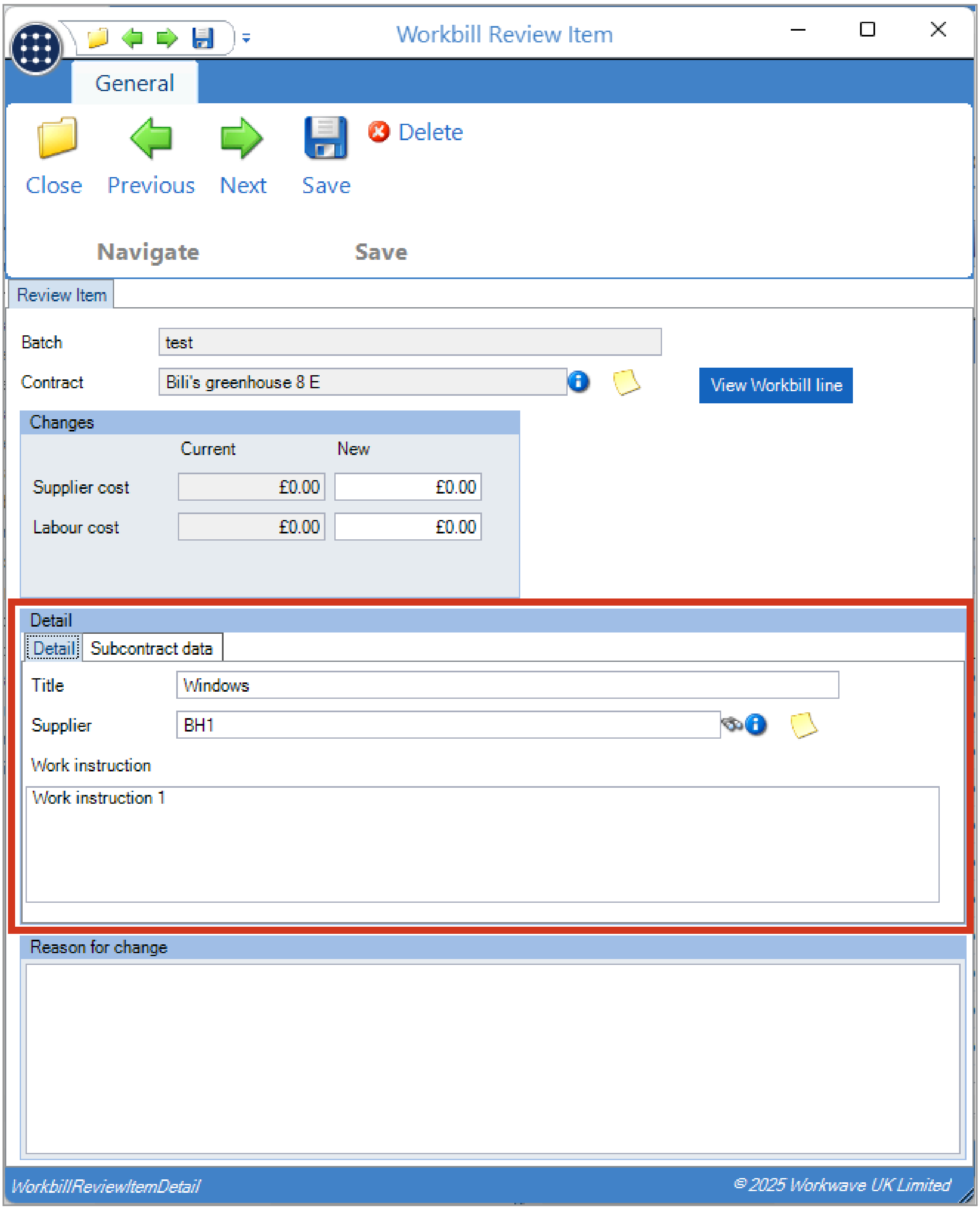


Optional Subcontract data columns have been added to the column chooser.

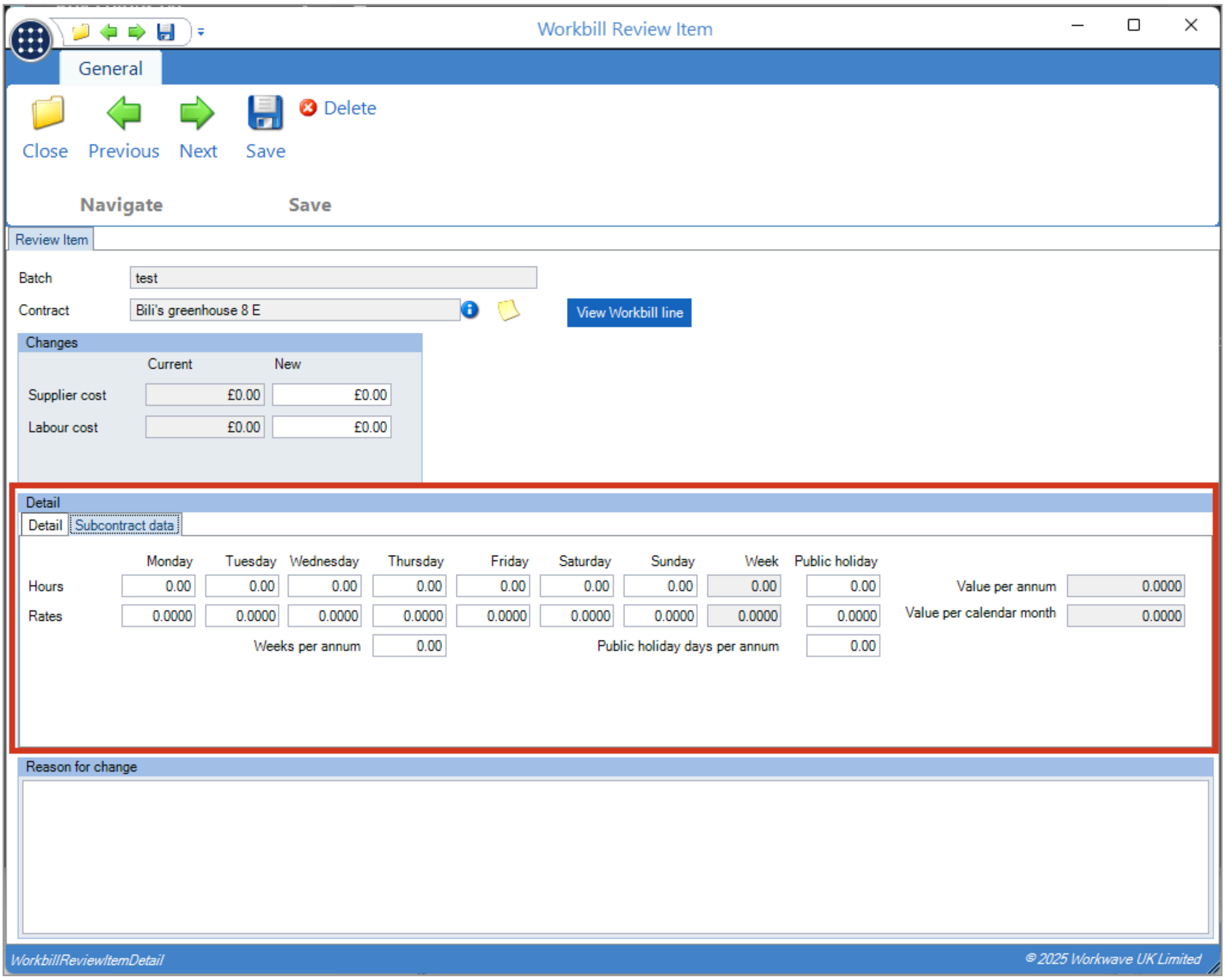


Workbill Review Item Detail

A new Detail section has been added to the item window. This section has two tabs – Detail and Subcontract data.



Note that the Supplier is only shown when the Contract Workbill line is defined as Assigned to supplier.



The Subcontract data tab contains the same fields that can be maintained on the Contract Workbill line, with the same validation and calculation rules that apply in Contract Workbill entry.

If no value, percentage, or end date changes are entered on the batch header, then the batch generates and allows the Details and Subcontract data to be maintained. In this case, the Changes section is not shown.

When a new End date has been entered on the batch header, then only the End date is shown on the item window, and the new details cannot be amended.

Import Template

New columns have been added to the Import template for Title, Work instruction and Supplier code. Note that the Supplier code field is greyed out when the Contract Workbill line is not Assigned to supplier.

Frequency	Title	Work instruction	Supplier code
1 Months	WBL 1	1	
1 Months	WBL 2	2	
3 Weeks	Windows	Work instruction 1	*51
3 Months	Windows	Work instruction 2	*51
2 Months	Windows	Work instruction 3	*51
2 Months	Windows	Work instruction 4	*51
2 Weeks	Windows	Work instruction 5	*51
2 Weeks	Windows	Work instruction 6	*51
1 Months	Windows	wb1	*51
1 Months	Windows	wb1	*51
1 Weeks	Windows	wb1	*51
1 Weeks	Windows	wb1	*51
1 Months	Windows	wb1	*51

A new Subcontract section has been added to the Import template, containing all the Subcontract data fields.

Subcontract																	
Mon hours	Tue hours	Wed hours	Thu hours	Fri hours	Sat hours	Sun hours	Public holiday hours	Mon rate	Tue rate	Wed rate	Thu rate	Fri rate	Sat rate	Sun rate	Public holiday rate	Public holiday days per year	Weeks per year
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

When an End date has been entered on the batch header screen, the Import template has been simplified to just show these columns:

Id	State	Client	Site	Contract	Effective from	Current effective to	New effective to	Note	Frequency	Title	Work instruction	Supplier code
1343	Rea	*17523 - Vi	VIK001/0	VIK001/01 - V	01/06/2020	31/12/9999 23:59	31/12/2026		1 Months	Non-IOC	Non-IOC !!!	
1344	Rea	*17523 - Vi	VIK001/0	VIK001/01 - V	01/06/2020	31/12/9999 23:59	31/12/2026		1 Months	IOC	IOC	

Batch Post

Upon posting of a batch that is not setting a new End date, each Contract Workbill line will be updated with the Title, Work instruction, Supplier and Subcontract data defined on the batch item.

Workbill Task Type Restrictions

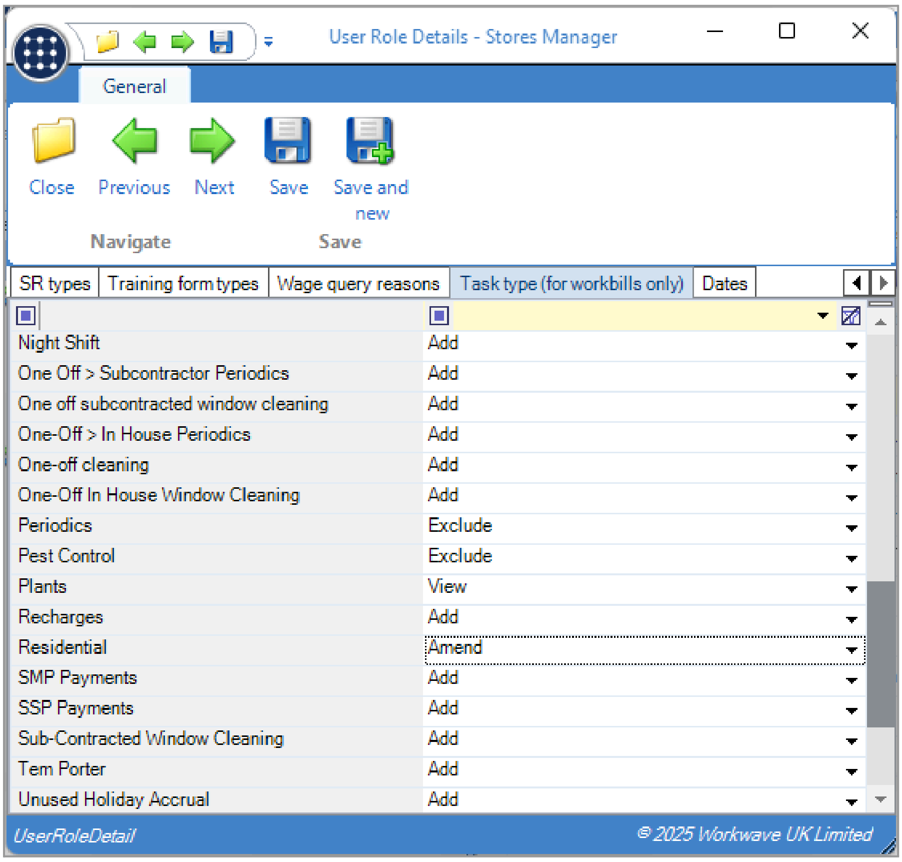
Background

TemplaCMS has been modified to allow control of which users can view, amend or add Workbills by setting permissions based on User Roles and Task Types. It is also possible to exclude users from seeing workbills of a specific task type.

User Roles

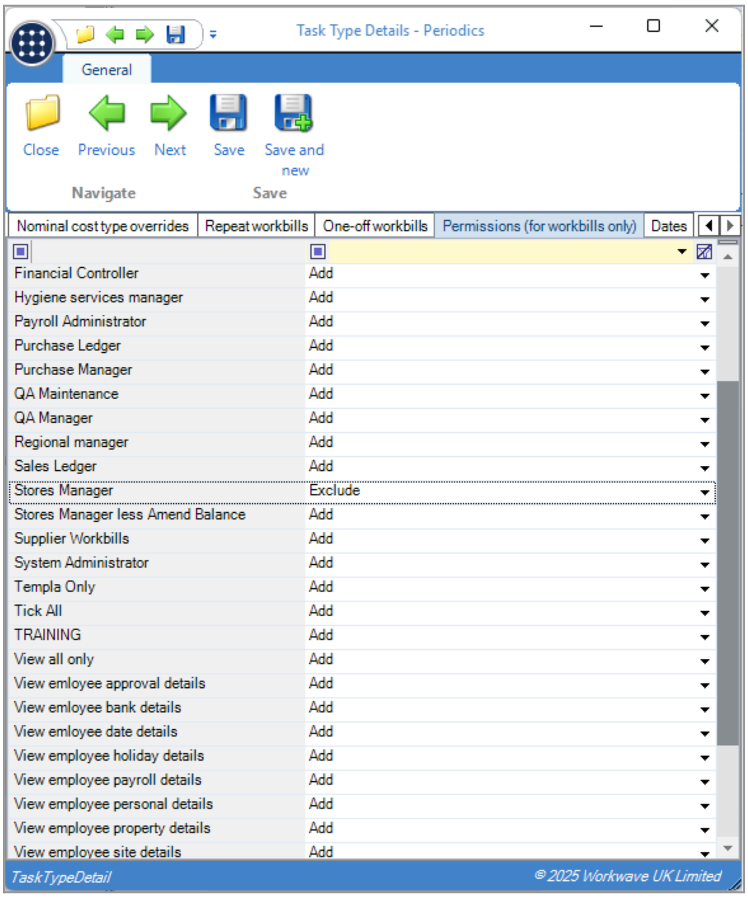
A new Task type tab has been added to the user role window. This shows all task types, allowing the desired permission level for users of this role to be assigned:

- **Add** – The user has full permission where they can View, Amend and Add workbills for the specific task type.
- **Amend** – The user can View and Amend workbills for the specific task type.
- **Exclude** – The workbills associated with the task type are not visible for the user with this permission.
- **View** – The user with this permission can only view workbills associated to the task type. No amendments are allowed.



Task Types

A new Permissions (for workbills only) tab has been added to the task type window. This shows all user roles, allowing the desired permission level for users of each role to be assigned. Thus the permissions can be maintained from either User Roles or Task Types.



Workbill List and Details

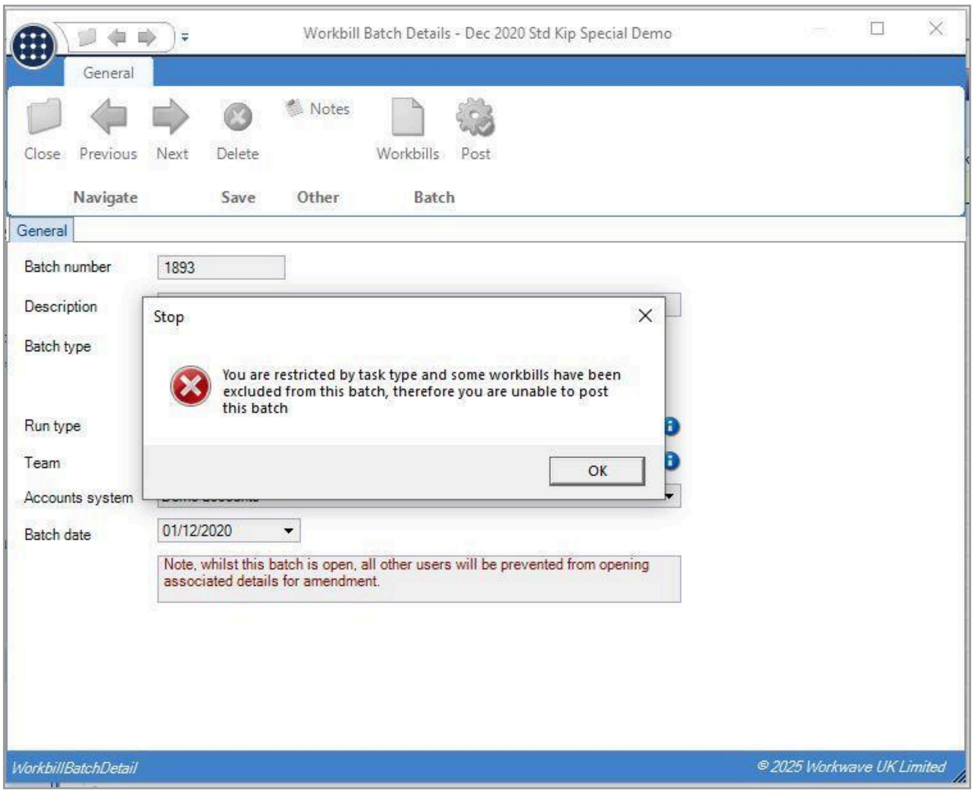
Within the Workbill List and Workbill Details windows, the permissions relevant to the user's role(s) will be applied. As such, some workbills may be excluded from visibility or be view-only. These permissions are also checked as the user attempts to perform any operation on a workbill. For example, an attempt to suspend a workbill for a task type to which the user has only View permission will be blocked.

Contract Workbills

This modification does not apply to adding or amending contract workbill lines. If a user is assigned to a user role that has a permission of Exclude against a task type, the user can still view, amend, and add contract workbill lines associated to that task type.

Workbill Batch Post

There could be a scenario where a workbill batch has been generated with workbills associated with task types for which the user is set to Exclude. In such a case, the user is prevented from posting the workbill batch.



Team Portal

The new user permissions have also been applied to the Team Portal.

Summary Invoice Groups

Background

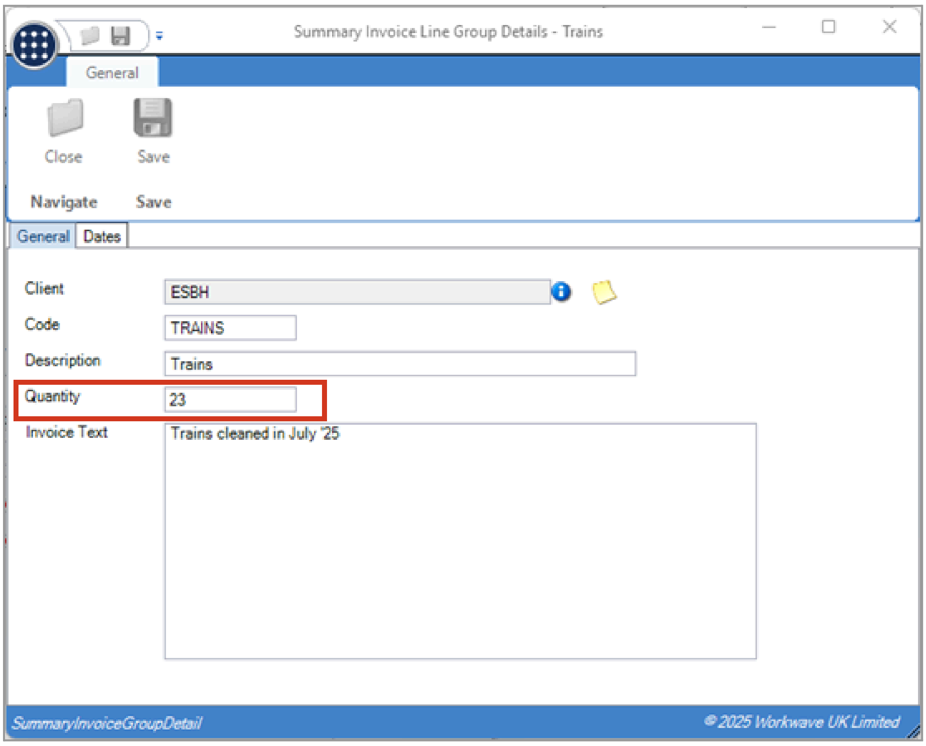
Summary Invoice Groups allow the simplification of an invoice when presented to the customer while retaining the ability to split invoice lines to different revenue streams for internal purposes. This facility can be used for invoices generated from contracts, or via ad-hoc invoice entry.

When using summary invoice groups, each summary line shows text derived from the group, and a total price summed from the lines.

Modifications have been made to improve the usability of summary invoicing – both in how they are defined and how they are amended during invoice processing.

Summary Invoice Group Quantity

A quantity can now be specified for each Summary Invoice Group. This value must be a positive integer greater than zero.

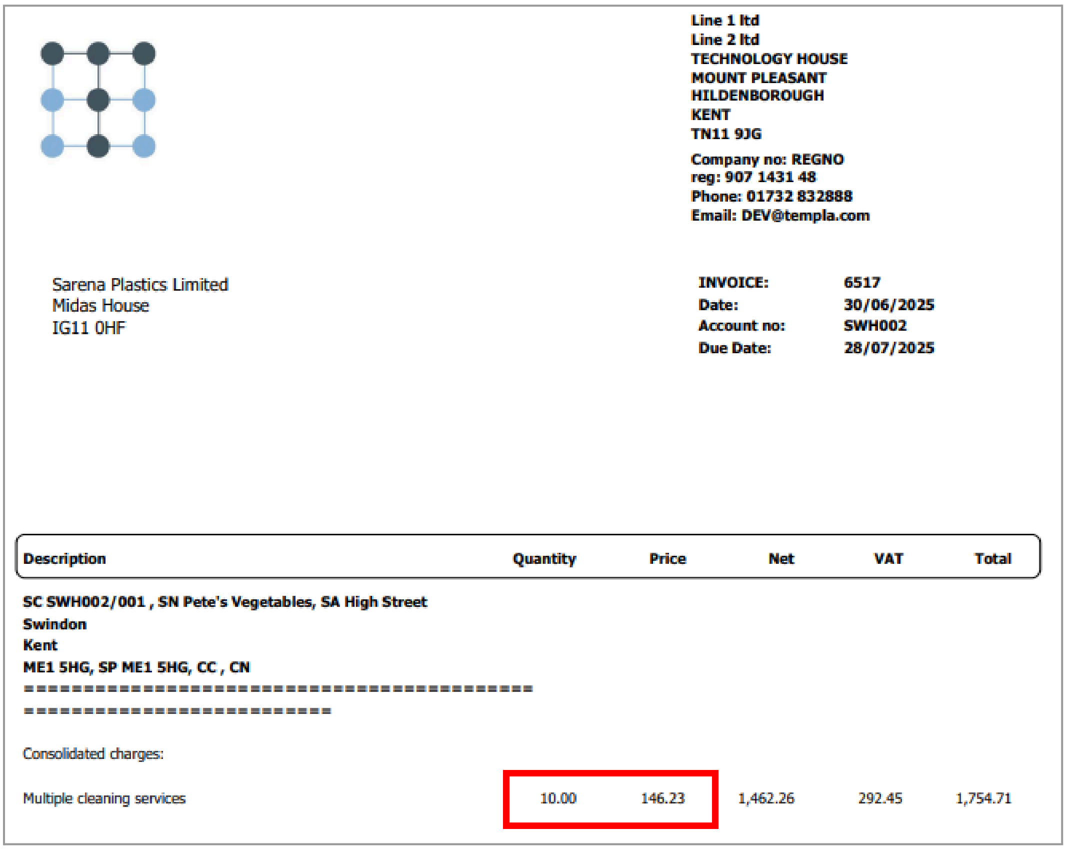


Invoice Document

If a quantity is specified for a Summary Invoice Group, then the following changes are visible on the invoice document:

- The Quantity column shows the specified quantity.
- The Price column shows a value that is calculated by dividing the total net value of all grouped lines by the specified quantity.

N.B. Small discrepancies caused by rounding may occur when comparing (Price x Quantity) with the Net total. This is expected behavior, as seen in the example screenshot:



Line 1 ltd
Line 2 ltd
TECHNOLOGY HOUSE
MOUNT PLEASANT
HILDENBOROUGH
KENT
TN11 9JG

Company no: REGNO
reg: 907 1431 48
Phone: 01732 832888
Email: DEV@templa.com

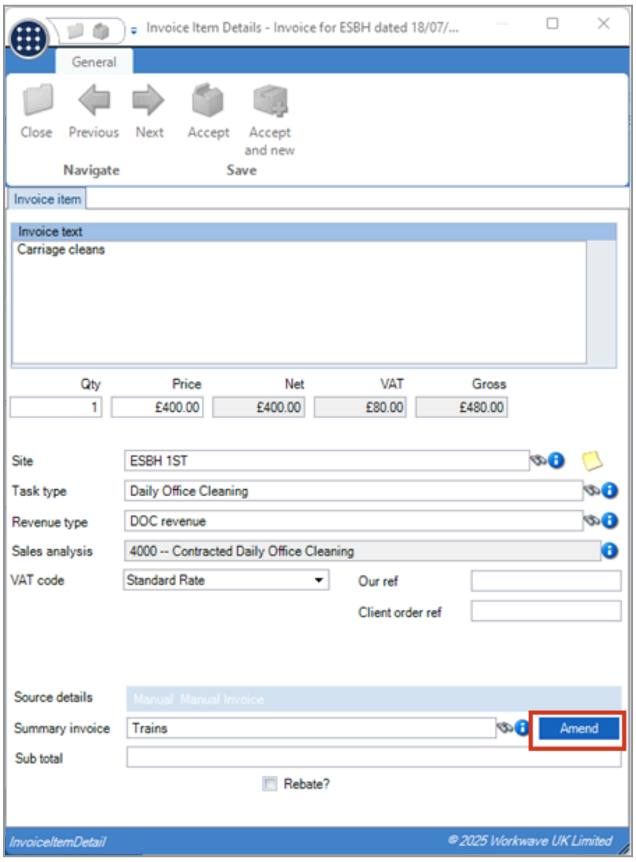
Sarena Plastics Limited
Midas House
IG11 0HF

INVOICE:	**6517**
Date:	**30/06/2025**
Account no:	**SWH002**
Due Date:	**28/07/2025**

Description	**Quantity**	**Price**	**Net**	**VAT**	**Total**
SC SWH002/001 , SN Pete's Vegetables, SA High Street **Swindon** **Kent** **ME1 5HG, SP ME1 5HG, CC , CN** **==** **=========================**					
Consolidated charges:					
Multiple cleaning services	10.00	146.23	1,462.26	292.45	1,754.71

Invoice Details

When amending a specific invoice line, it is now possible to directly access the amendment of the summary invoice group via a new Amend button. This opens the corresponding Summary Invoice Group window for editing.



The button is only available if the user has the SummaryInvoiceGroup.Amend permission.

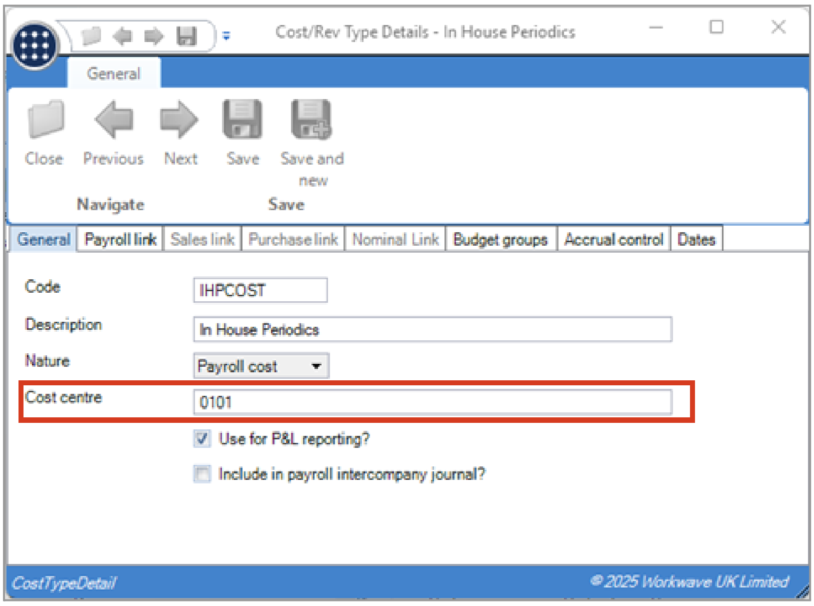
Sage50 : Department

Background

The export of date for import into Sage50 has now been expanded to include the department information.

Cost Types

If you are using Sage50 and require the Department to be included on the transaction interface, this should be specified in the Cost Centre of each cost type.



Transaction Post

On each transaction post process that creates a file for import into Sage50, if the transaction line references a cost type on which the Cost Centre has been specified, the Cost Centre is included in the export file in a new Department column at the end of the CSV format.

Timegate+ Interface : Duties

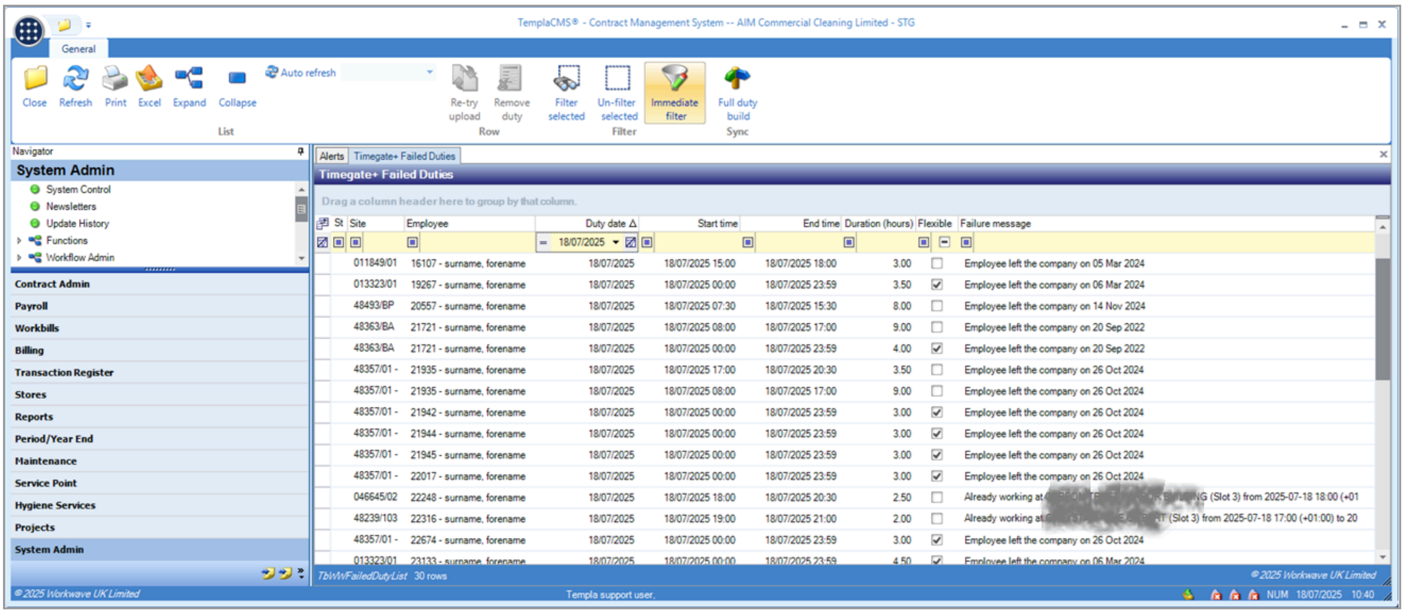
Background

When TemplaCMS sends Duties to Timegate+, they are validated before they are accepted by Timegate+, and this may result in some duties being rejected. Improvements have been made to TemplaCMS to allow the user to be aware of and handle these duties.

Timegate+ Failed Duties

This new menu option has been added to the System Admin > Gateway Admin menu.

When run, this show a list of all duties sent to Timegate+ that have been marked as failed.



As per the above screenshot, each row shows details of the duty and the failure message returned from Timegate+.

Using the taskbar functions, the user can:

- Retry upload – For the selected row(s), this simply resends the duty in its current form to Timegate+. For example, if the failure was "Employee left the company …" then after reemploying in Timegate+, users should retry the upload.
- Remove duty – For the selected row(s), this removes the duty from the failures list. If the duty is in the future the next full duty build recreates it, though possibly with different details if the correction has been carried out within TemplaCMS.
- Full duty build – This begins a full build of duties immediately (via the batch and gateway queues), regardless of when the next scheduled build is due.

Log Numbers

This enhancement update contains the following log numbers:

WI4723

WI5659

WI5681

WI5682

WI5683

WI5684

WI5685

WI5686

WI5710

WI5845

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.