



TemplaCMS Newsletter

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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.

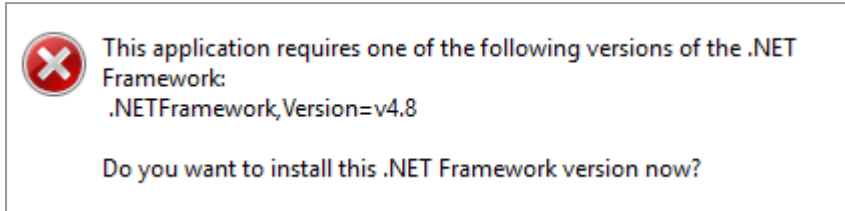
In some instances, where the new functionality is minimal, the TEAM Software Customer Success Manager can cover this with the client. However, where the functionality is not minimal or has implications elsewhere in the system, training must be provided by the TEAM Software implementation team to the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

FRAMEWORK

The TemplaCMS application and services run within the Microsoft .Net framework.

As a part of this update, the target version of the framework has been changed to 4.8 – a version which currently has no support end date.

Many servers and PCs already have this version (or a later version) of the framework installed, but if not, the following message displays when attempting to run the application:



The framework can be downloaded from the below URL:

<https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48>

Note that installation of the framework requires a reboot of the server or PC.

INTERCOMPANY REBATES

Background

Previously, contract billing lines and invoice lines could not be defined as both Intercompany and Rebate. This restriction has been removed to allow this combination, where the rebate values are posted to the source accounts system and the net of rebate values are posted to the intercompany target accounts system.

Contract Billing

On a Standard contract billing line (i.e. not Workbill, Recharge or Ad hoc), a combination of **Rebate %** and **Intercompany Site** is now permitted.

Invoice Generation

When generating invoice lines from a standard contract billing line that has a rebate percentage, the system creates two invoice lines, one for the contract billing line value less the rebate, and the second for the rebate value. When the source billing line has an Intercompany site, this is applied to the first line, but not to the rebate line.

For example, this contract billing line would result in the two invoice lines on the next page:

Contract Billing Line - BH intercompany source 2

General

Close

Previous

Next

Accept

Accept and new

Subcontract data

Navigate

Save

Other

Billing line

Effective

01/12/2024

to

(not set)

Type

Standard

☐ Suppress in non working periods?

☐ Hours billing?

Inv text

SECURITY

☐ Use daily rate?

Quantity

1

Unit price

£2,501.29

Price

£2,501.29

Weekly

£577.22

Monthly

£2,501.29

Annual

£30,015.48

Basis

Arrears

Frequency

1

Months

Task

1 -- Daily office cleaning -- Daily office cleaning

Revenue type

Other revenue

☒ Rebate %

3.09%

Weekly

-£17.84

Monthly

-£77.29

Annual

-£927.48

Rebate revenue type

Rebate accrual

VAT

20 Percent

Invoice run

Bil's Billing

Client PO ref

Our ref

Inv to WB x-ref

Inter-company site

Bil intercompany target 2

Inter-company datasource

Other accounts.

Details and reason for change

Groupings

Consolidation

BH intercompany sour

Consolidation seq

0

Sequence

Summary invoice

Sub total

Document delivery

Address to

Client

InterCompany Source Cli

Suspend

☐ Suspended?

Auto re-instate

(not set)

Dates

Last invoice

31/12/2024

Next invoice

31/01/2025

ContractBilling

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Invoice Item Details - Invoice for Inte...

General

Close Previous Next Accept Accept and new

Navigate Save

Invoice item

Invoice text
SECURITY

Qty	Price	Net	VAT	Gross
1.00	£2,424.00	£2,424.00	£484.80	£2,908.80

Site: BH intercompany source 2

Task type: Daily office cleaning

Revenue type: Source revenue cost type

Sales analysis: 006NA -- Adhoc Consumable Sales - NA

VAT code: 20 Percent

Our ref:

Client order ref:

Source details: Contract billing BHICS02a -- BH intercompany source 2

Summary invoice:

Sub total:

☒ Inter-company?

Inter-company

Site: Bil intercompany tarrget 2

Datasource: Other accounts.

Target cost type: Other revenue

InvoiceItemDetail © 2025 Workwave UK Limited

Invoice Item Details - Invoice for Inte...

General

Close Previous Next Accept Accept and new

Navigate Save

Invoice item

Invoice text
SECURITY

Qty	Price	Net	VAT	Gross
1	£77.29	£77.29	£15.46	£92.75

Site: BH intercompany source 2

Task type: Daily office cleaning

Revenue type: Rebate accrual

Sales analysis: 006EA -- Adhoc Consumable Sales - EA

VAT code: 20 Percent

Our ref:

Client order ref:

Source details: Contract billing BHICS02a -- BH intercompany source 2

Summary invoice:

Sub total:

☐ Inter-company?

InvoiceItemDetail © 2025 Workwave UK Limited

Note that it is not possible to select the **Intercompany** option on the second (rebate) line. If either of this pair of lines is amended, then a warning is issued to inform the user that the other line may need to be amended as well, as this is not automatic.

Ad Hoc Invoices

When entering ad-hoc invoices or credits, it is now possible to select both the **Intercompany** and the **Rebate** options on the same line, thus permitting entry of the appropriate details for both. On acceptance of such an item, the two invoice items are created as an Invoice Generation, with an Intercompany line and a non-Intercompany Rebate line.

Invoice Item Details - Invoice for Inte...

General

Close

Accept

Accept and new

NavigateSave

Invoice item

Invoice text

Ad hoc line

Qty	Price	Net	VAT	Gross
1	£1,000.00	£1,000.00	£200.00	£1,200.00

Site

BH intercompany source 2

Task type

Daily office cleaning

Revenue type

DOC Contract Revenue

Sales analysis

005EA -- Contract Consumable Sales - EA

VAT code

20 Percent

Our ref

Client order ref

Source details

Manual

Summary invoice

Sub total

Inter-company?

Rebate?

Inter-company

Site

Datasource

Target cost type

Rebate

Rebate %

0.00%

Revenue type

InvoiceItemDetail© 2025 Workwave UK Limited

Invoice Post

On posting an Intercompany invoice, the Intercompany Journal that is created is for the net of rebate value (in the above example, that would be £2424.00).

WORKBILL ONLY CONTRACTS

Background

A requirement was presented for a simplified type of contract where no pay-related details are required or permitted. These contracts are intended exclusively for use with one-off Workbills.

Contract Type

A new **Workbills only** option has been added to the Contract Type drop-down list within the Contract form.

When selected, the following tabs are hidden from the Contract form:

- Task pay (where available)
- Calendar
- Budget roster (where available)
- Budgets
- Pay
- Stores
- HS
- QA

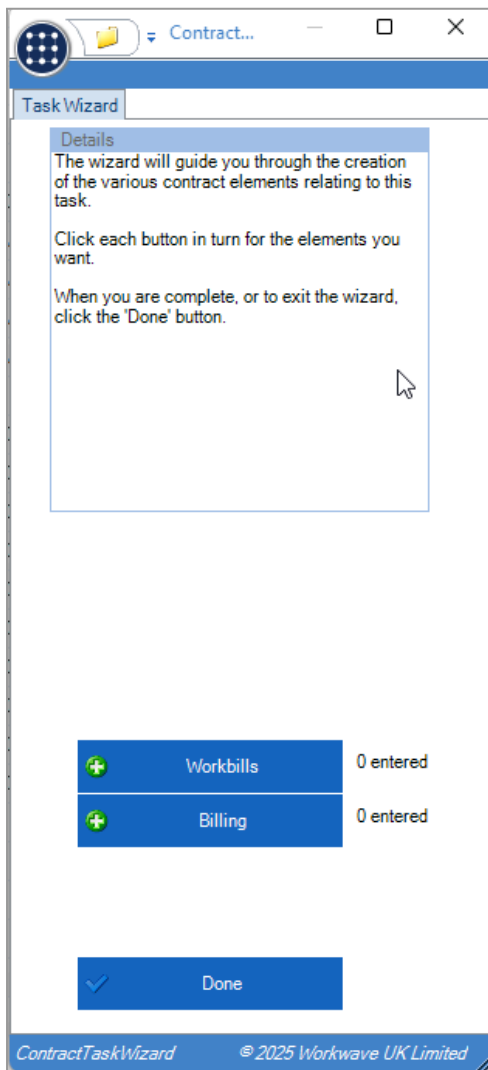
A contract can only be changed to **Workbills only** if none of the above listed tabs contain data.

The screenshot shows the 'Contract - Aerials Ltd Import 1' form. The 'General' tab is active, and the 'Contract type' dropdown is open, showing 'Workbills only' as the selected option. The form includes fields for Reference (AHM001/12a), version (1), Client (Aerials Ltd), Site (Aerials Ltd), Description (Aerials Ltd Import 1), Calendar (Standard), Working/cleaning weeks per year (0.00), Min cover rate (0.00), Max cover rate (0.00), Default cover rate (0.00), and Max timesheet rate (0.00). The 'Contract starts' field is set to 01/01/2021, and 'Contract ends' is (not set). The bottom section shows a table of contract details.

Added	By	Version	Details
04/08/2025 15:22:47	Mr Peter Cooper	1	DOC - Daily office cleaning Ver 1 -- Task added - 1 - Daily office cleaning type - Daily office cleaning task dates - 01/01/2021 on details - Daily office cleaning frequency - 1 Months

Task Wizard Behaviour

When adding a new task to a **Workbills only** contract, the Task Wizard is automatically adjusted to reflect the reduced set of available options. This ensures consistency across both contract setup and task configuration.



TIMEGATE+ INTERFACE – BREAK DETAILS

Background

Within TemplaCMS, it is possible to define the frequency and length of breaks to be taken during a duty.

In the UK, the break pattern is only defined if breaks are unpaid, and the site is linked to a T&A system. They can be defined on the site record, with an optional override on an employee assignment to the contract. For example:

The screenshot displays the 'Site Detail - The School' window in the Timegate+ interface. The 'General' tab is active, showing fields for System (Timegate+), Processing option (Memorandum), Site reference, Unique site id (SIN) (22), and Shift live from (not set). A 'Multi-site building' section is also visible. The 'Breaks' tab is selected, showing the 'Unpaid?' checkbox checked. The 'First break' is set to 1.00 (hours) after first 5.00 (hours), and 'Subsequent breaks' are set to 0.25 (hours) every 2.00 (hours). The 'Memo' field is empty. The footer shows 'SiteDetail' and '© 2025 Workwave UK Limited'.

Field	Value
System	Timegate+
Processing option	Memorandum
Site reference	
Unique site id (SIN)	22
Shift live from	(not set)
Unpaid?	☒
First break	1.00 (hours) after first 5.00 (hours)
Subsequent breaks	0.25 (hours) every 2.00 (hours)

In Australia and Iceland (running the Awards Interpretation module), the pattern is defined within the award scheme to which each employee belongs, and the payable nature of the breaks can be varied by the shifts that the duty identifies as. For example:

Award Scheme Details - Modern Cleaning Award

General

Close

Previous

Next

Save

Save and new

Navigate

Save

General

Award rates

Shift identification rules

Calculation rules

Dates

Code

MODC

Description

Modern Cleaning Award

Start time buffer

(minutes)

End time buffer

(minutes)

Minimum gap for day adjustment

(minutes)

Maximum gap for continuing session

(minutes)

Maximum gap for continuing breaks

(minutes)

Standard breaks

Daily overtime breaks

Paid for breaks?

Use shift-prefer paid

First break

1

(hours)

after first

5

(hours)

Subsequent breaks

0.25

(hours)

every

2

(hours)

Break buffer

(minutes)

☒ Apply shift identification to leave adjustments?

☐ Suppress hours roll-up when rate below basic?

☐ Include missed rostered hours in overtime calculations?

Configure missed hours

AwardSchemeDetail

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Timegate+ Duty Export

The export of duties to Timegate+ has now been enhanced to apply the appropriate pattern to each duty as it is built, determining whether each break is paid or unpaid as appropriate. The resulting details are then visible within Timegate+ Web and will shortly also be visible on Timegate+ Mobile.

Plan

Monitor

Manage

Analyse

Set Up

Admin

New

Back

Save

Assign An Employee

Suitable Employee

Remove Employee

Split Duty

Go to Map

The Black Horse

Slot No: 8 (Post 8)

05/09/2025

Scheduled

Operational

Actual

Pay/Bill

Times

Calls

Check Fails

Premiums

Qualifications

Audit Trail

Sub Duties

Pay/Bill

Info

Service

Flexible Shift?

Start

Finish

Duration

Employee

Hour Type

Pay Level

Scheduled

05/09/2025

14:00

06/09/2025

00:45

10:45

Matthews, Kitty

REG (Regular)

CL (Cleaner)

Operational

05/09/2025 14:00

06/09/2025 00:45

10:45

Matthews, Kitty

REG (Regular)

CL (Cleaner)

Actual

-

-

-

-

-

-

Include In Site Team

Send Auto Messages

Meal Breaks

Duration (mins)

Pay Duration (mins)

Bill Duration (mins)

Meal Break 1

60

60

60

Meal Break 2

15

15

15

Meal Break 3

15

15

15

Meal Break 4

15

15

15

Add a Meal Break

LOG NUMBERS

This enhancement update contains the following log numbers:

WI5979

WI5675

WI5980



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.