



TemplaCMS Newsletter

V6.1.0 | Update 2025.09 | September 2025

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.

QUERY REPORT PIVOT DRILLDOWN

Background

The ability to select one or more rows on a query report and pivot the data to a new grid view has been added.

Query Reports

The generic requirement to pivot data directly from within TemplaCMS on query reports is now available for one (or more) selected rows. This also improves readability where a single cell contains a large amount of multi-line data, which results in hover text that can be hard to read.

On a run report, a new **Pivot** taskbar option is available when one or more cells are selected.

Multiple periods of furlough

General

Close

Print

Excel

Expand

Collapse

Select report

Report parameters

Run report

Select saved results

Save results

Pivot

Re-size columns

Multiple periods of furlough

Drag a column header here to group by that column.

Employee code	Employee name	Nic number	Email	Address	Site code	Site name
**8257	bledford brenda		dfgdfg		BAFH	BAFH
11857	Hughes Oren Lionel	ZZ100058A	wagestream_11857@templa.com	Lakeview test CM15 9ST	*1044	Pink Pig Cafes
12074	Knight Len Daquan	ZZ100073A	wagestream_12074@templa.com	34-36 Perrymount Rd 125 High Street test CM14 4DR	*1044	Pink Pig Cafes
12074	Knight Len Daquan	ZZ100073A	wagestream_12074@templa.com	34-36 Perrymount Rd 125 High Street test CM14 4DR	*1044	Pink Pig Cafes
12088	Henson Timon Brady	ZZ100085A	wagestream_12088@templa.com	Devonshire House Royston Road test TW20 8TD	QUARR1/004	The Purple Ma
200	Smith Jorge Wade Laurence	ZZ100111A	wagestream_200@templa.com	20 Denny Court ss test ME8 0NZ	OM001/01	Orange Man
200001	Wyatt Raphael Garth	ZZ100112A	wagestream_200001@templa.com	125 Peter St Kent test ME9 0GF	TL93327c#/01	Green Fish Ca
200001	Wyatt Raphael Garth	ZZ100112A	wagestream_200001@templa.com	125 Peter St Kent test ME9 0GF	TL93327c#/01	Green Fish Ca
200020	Baps Kip P Ling	ZZ100124A	wagestream_200020@templa.com	Flat 1 The Road Kent test TN11 9JG	QUARR1/005	The Blue Man
200023	ALJ 123 123 xyz lkj	ZZ100126A	wagestream_200023@templa.com	54 Tester Road	QUARR1/007	Magenta Man
200026	ALJ Surname ALJ Forename		wagestream_200026@templa.com	200026 address test DA5 6PH	QUARR1/003	The Yellow Ma
200026	ALJ Surname ALJ Forename		wagestream_200026@templa.com	200026 address test DA5 6PH	QUARR1/003	The Yellow Ma
200034	PPPProspect P	ZZ100132A	wagestream_200034@templa.com	test TN11 9JG	BH/03	Bil's chicken s
200035	Kelp Jo	ZZ100133A	wagestream_200035@templa.com	test TN11 9JG	QUARR1/005	The Blue Man
200035	Kelp Jo	ZZ100133A	wagestream_200035@templa.com	test TN11 9JG	TL93327c#/01	Green Fish Ca

QueryReport 19 rows Building drill down ... plotting data

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When clicked, each distinct row from the selected cells is extracted, and the data is pivoted to a new drilldown report.

Query Drill Down

ClosePrintExcelExpandCollapseRe-size columns

report

Drag a column header here to group by that column.

Employee code	200001	200001	200020	200023
Employee name	Wyatt Raphael Garth	Wyatt Raphael Garth	Baps Kip P Ling	ALJ 123 123 xyz lkj
NICNumber	ZZ100112A	ZZ100112A	ZZ100124A	ZZ100126A
Email	wagestream_200001@templa.com	wagestream_200001@templa.com	wagestream_200020@templa.com	wagestream_200023@templa.com
Address	125 Peter St Kent test ME9 0GF	125 Peter St Kent test ME9 0GF	Flat 1 The Road Kent test TN11 9JG	54 Tester Road Testington Testington Testington123 test TN109998
Site code	TL93327c#/01	TL93327c#/01	QUARR1/005	QUARR1/007
Site name	Green Fish Cafe.	Green Fish Cafe.	The Blue Man	Magenta Man
Task number	2	1	1	1
Work type	Supervisor	Cleaner	Cleaner	Admin
LeftDate	31/12/9999 00:00:00	01/04/2021 00:00:00	31/12/9999 00:00:00	31/12/2021 00:00:00
1st Furlough start date	02/03/2020 00:00:00	05/03/2020 00:00:00	01/04/2020 00:00:00	02/03/2020 00:00:00
1st Furlough end date	31/03/2020 00:00:00	31/03/2020 00:00:00	13/04/2020 00:00:00	
2nd Furlough start date	01/05/2020 00:00:00	04/05/2020 00:00:00	20/04/2020 00:00:00	
2nd Furlough end date	29/05/2020 00:00:00	28/05/2020 00:00:00	30/04/2020 00:00:00	
3rd Furlough start date				
3rd Furlough end date				
4th Furlough start date				
4th Furlough end date				
5th Furlough start date				
5th Furlough end date				

QueryDrillDown 20 rows Building drill down ... plotting data

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The report allows normal print/export to Excel/expand/collapse, and like the query report allows the resizing of columns via a taskbar button. Additionally, all cells are activated so text can be directly copied into the local computer clipboard. Multi-line text is also handled in the drilldown.

INVOICE LIST ADDITIONS

Background

The ability to filter the invoice list by financial year and period has been added, along with the ability to see the **Our ref** column on the list.

Invoice List

The invoice filter now has additional options to filter by financial year and period from and to. These options filter exactly as per the corresponding options on the invoice line filter.

A new **Our ref** column has also been added to the column chooser.

As the invoice filter shows header level information, and Our ref is held at invoice line level, this column shows the same Our ref details that would print on the invoice itself when distributing. As such, the column is only filled on a header where a single, consistent reference appears on all the invoice lines on an invoice header.

BUDGET REVIEW

Background

The format of the Excel import template has been expanded.

Excel Import Template

The budget review batch import template has been amended to include the contract budget description as a new read-only column between task and pay scale.

6														
7														
8	Id	Client	Site	Contract	Task	Budget description	Pay scale	Budget group description	Frequency	State	Mon	Tue	Wed	
9	7860	QUARR1	QUARR1/I	QUARR1/006	1	Wages		Wages	1 Weeks	The	7.00	7.00	7.00	
10	7861	QUARR1	QUARR1/I	QUARR1/006	2	Daily office cleaning (2)		Wages	1 Weeks	The	5.00	5.00	5.00	
11	7862	QUARR1	QUARR1/I	QUARR1/006	3	Daily office cleaning 3		Wages	1 Weeks	The	5.00	5.00	5.00	
12	7863	QUARR1	QUARR1/I	QUARR1/006	4	Daily office cleaning 4		Wages	1 Weeks	The	5.00	5.00	5.00	
13	7864	QUARR1	SE/MURP	MURPH01/00	2	w		Wages	1 Weeks	The				
14	7865	QUARR1	SE/MURP	MURPH01/00	1	1		Wages	1 Months	The				
15	7866	QUARR1	SE/MURP	MURPH01/00	3	3		Wages	1 Months	The				
16	7867	QUARR1	*1002 - The	*1002 - The Bld	1	Wages		Wages	1 Weeks	Rea	7.00	7.00	7.00	
17	7868	QUARR1	*1002 - The	*1002 - The Bld	2	Wages		Wages	1 Weeks	Rea	2.00	2.00	2.00	

MAP BROWSER

Background

The equivalent of a web browser window is embedded in various places within TemplaCMS. It's currently used for two different purposes:

- Rendering blocks of text with rich formatting – bold, font size, colours, etc.
- Rendering Internet-based web pages – primarily for displaying and interacting with maps.

The browser component previously used within TemplaCMS was of an older generation, which was leading to errors and the inability to view pages from certain sources.

Upgraded Browser Component

TemplaCMS has been upgraded to use the Microsoft WebView2 browser component, which is based on the Microsoft Edge browser. This improves compatibility with external websites, reduces rendering errors, and increases security.

Operating System Support

The impact of this change depends on the version of Windows users are running.

- **Windows 11** – Nothing to do – the WebView2 runtime is preinstalled with all versions of Windows 11.
- **Windows 10** – Most devices will have received the WebView2 runtime as part of Windows automatic updates. It was first made available to consumers in April 2021.
- **Older** – Users will most likely need to manually install WebView2, or they may experience a warning when opening relevant areas of TemplaCMS.

Manual Installation

If users need to manually install Microsoft WebView2 it can be accessed by opening the link below.

Look for the “Evergreen Bootstrapper” download for WebView2.

WebView2 automatically updates to ensure the latest browser security is maintained.

<https://go.microsoft.com/fwlink/p/?LinkId=2124703>

STORES ORDER DOCUMENTS

Background

There is an existing option on System Control that allows a business analysis level to be selected to be printed on manual stores order forms. The same analysis details is now printed on the supplier copy of the stores order.

System Control

The business analysis level to be printed on the stores order documents is defined in System Control – Stores.

System Control - Stores

General

Close Save

Navigate

Stores Repeating orders Purchase types

Budgetary control frequencies

Count	Basis	Fixed period	Description	Mobile device and stores order form
1	Monthly	Fixed period	Fixed month	☐
2	Monthly	Fixed period	Fixed quarter	☒
3	Yearly	Fixed period	Fixed year	☐
4	Yearly	Rolling period	Rolling years	☐
5	Weekly	Fixed period	Fixed 4 weeks (TEST)	☐

Budget year end date31/12/2021

Budget management levelContract

Documents

Picking list analysis level(Not set)

Delivery note analysis level(Not set)

Stores form analysis levelRegion

☐ Control supplier order redistribution

Order number prefix

☐ Suppress suffix?

☒ Allow stores order quotes?

Supplier Order

If defined in System Control, then the selected analysis level and the site's analysis code for that level is printed on the Supplier Order as shown below.

Supplier address:
Grant International Ltd
Ashdown House
RH12 1AT
Phone: 01202 659230 Fax: 01202 658795



Test company name Ltd
Test
TECHNOLOGY HOUSE
MOUNT PLEASANT
HILDENBOROUGH
KENT
TN11 9JG
VAT reg: 907 1431 48
Phone: 01732 832888

Order no: 4937/1Purchase Order

Order date: 30/09/2025Required date: 30/09/2025

Delivery address: Newsletter site

Client order ref:

Ordered by: BH

Site contact:

Site detail: NL2020 - Newsletter site

Region: South East

Special instructions:

TIMEGATE+ TERMINATED EMPLOYEES

Background

Timegate+ does not permit duplicate email addresses or mobile numbers across employees. This causes an issue when a previous employee is reemployed with a new employee number but with the same email address and/or mobile number, as the export from TemplaCMS to Timegate+ will be rejected.

External System

A new **Remove email/mobile on terminated employees?** option has been added to the Timegate+ defaults tab on External System Details.

External System Details - Timegate+

General

Close Previous Next Save Save and new Run housekeeping Re-Create folder structure Create sync database Sync failures Timegate+

General Time & attendance Mappings Timegate+ defaults BA mappings Timegate+ sync settings Responsible users Dates

Arbitration check days	18
Escalation group type Id	222
Function roles (comma separated)	Administrator
Left employee include in sync days	60
Remove email/mobile on terminated employees?	☒
Site identification number length	4
Templa webAPI callback URL	
Timegate+ Site groups enabled?	☐
Timegate+ Webhooks enabled?	☐
Timegate+ Webhooks tenant Id	
Timegate+ Webhooks URL	
Use arbitrated calls?	☒

Site analysis code

Area Manager	01 ANNE ARMSTRONG
Company	1-ANGLIA
Contract Manager	ANDRE ANDERSON
Customer Type	Category A = Large
Division / Region	3 - TAUNTON
Managing Agent	AXA Real Estates
Sales Type	
Sector	Education
Timegate+ branch	Templa branch

ExternalSystemDetail © 2025 Workwave UK Limited

When selected, the export of employee details from TemplaCMS to Timegate+ removes the email address and mobile number from Timegate+ if the employee has a Left date in TemplaCMS.

CONTRACT SUMMARY WAGE COSTS

The date navigator on the Contract Summary form has been moved such that it applies to the entire Wage Costs tab rather than just the currently selected employee. This means that the list of employees at the bottom of the form reflects those effective on the selected date rather than only listing those which are effective as of today's date.

Contract Summary

Contract QUARR1/017

The Angle

Site QUARR1/017

The Angle

Starts 01/05/2025

Properties

Supervisor

Property - Timegate...

Salesforce Site Date

Salesforce Site Dat...

URL 1

URL 2

URL 3

Contract Summary...

Contract Summary...

Contract Summary...

Contract Summary...

Contract URL

Date/Time

Wage costsIncomeContacts

<< 29/09/2025 >>

Employee **8317

Task 1 - Daily office cleaning

Work type Cleaner Working weeks 52.14

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Full week
Start	(not set)	(not set)	(not set)	(not set)	(not set)	(not set)	(not set)	
End	(not set)	(not set)	(not set)	(not set)	(not set)	(not set)	(not set)	
Hours	7.00	7.00	7.00	7.00	7.00	0.00	0.00	35.00
Rate	£12.00	£12.00	£12.00	£12.00	£12.00	£0.00	£0.00	
Daily pay	£84.00	£84.00	£84.00	£84.00	£84.00	£0.00	£0.00	£420.00

Employee name	Work type	Avg wkly hours	Avg wkly earnings	Avg mthly earnings	Avg annual earnings	Effective
Wendy Brown	Cleaner	35.00	£420.00	£1,824.90	£21,898.80	01/05/2025 on
Wendy Brown	Cleaner	35.00	£420.00	£1,824.90	£21,898.80	01/05/2025 on
Wendy Brown	Cleaner	11.00	£165.00	£716.93	£8,603.10	01/09/2025 on
Wendy Brown	Cleaner	35.00	£350.00	£1,520.75	£18,249.00	11/08/2025 on
	Holiday	0.00	£144.47	£632.33	£7,588.00	
		116.00	£1,499.47	£6,519.81	£78,237.70	

LOG NUMBERS

This enhancement update contains the following log numbers:

WI5996

WI6073

WI5993

WI5994

WI5995

WI3788



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.