



# 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.

# CONTACTS AND CONTACT STRUCTURE LISTS

## Background

Contacts can be assigned to any number of clients, sites, and suppliers. From both the contacts list and contact structure list, it is now possible to tell which contacts are associated with live contracts, and to filter by this.

## Contacts Filter

A new **Has live contracts?** option has been added to the contacts filter. This option is available when using the contacts filter from the contacts list and contact structure list.

The screenshot shows a software window titled "Contact Filter Detail - Live contracts only". It has a menu bar with "General", "Contact filtering criteria", "Contact properties filtering criteria", "Site properties filtering criteria", and "Client properties filtering criteria". The "General" tab is active. Below the menu bar is a toolbar with icons for "Close", "Previous", "Next", "Save", and "Select format". The main area contains several input fields: "Contact code", "Contact name", "Address", "Postcode", "Job title", "Client", "Supplier", "Site", and "Contact type". There is also a "Contact source" dropdown menu set to "(all)". Below these are three groups of radio buttons: "Include owned" (No, Yes), "Has live contracts?" (No, Yes, Ignore), and "Assigned" (No, Yes, Ignore). The "Has live contracts?" group is highlighted with a red rectangular box. At the bottom of the window, there is a footer with "ContactFilterDetail" on the left and "© 2025 Workwave UK Limited" on the right.

## Contacts and Contact Structure Lists

When viewing the contacts and contact structure lists a new **Has live contracts** column can be added from the column chooser. This field is populated by looking at the contact's assignments across clients and sites and showing true where any contact's client or site is assigned to a live contract. Note that supplier assignment has no bearing on a contract's **live contracts** status.

# OPEN FINANCE CLIENT AND SUPPLIER CODES

## Background

When a client had sales invoices or stores orders, or a supplier has purchase invoices, it was previously not possible to amend their code within TempLaCMS.

This restriction has now been removed where the client or supplier datasource is Open Finance.

## Clients and Suppliers

On clients and suppliers with Open finance datasources, where the ability to amend the code has been blocked, a new **Change code** taskbar button has been added. When clicked, the user is prompted to confirm the code change, after which the code can be amended.

The screenshot shows the 'Client Detail - Justin's client' window. The taskbar at the top contains several icons: Close, Previous, Next, Save, Notes, Attachments, Create mail, Client sites, Summary invoice line groups, Consolidated invoice groups, Roster, Change code (highlighted with a red box), Transactions, and Reports. Below the taskbar, the 'General' tab is selected, showing fields for Accounts system (Open finance - Cleaning), Code (JHT001), Type (Managed), Name (Justin's client), Address (The house, The street), Town (The town), County (Kent), Postcode (ME9 0BS), VAT (20%), Telephone (01227 874555), Fax (01227 874666), Email (justin.turner@workwave.com), Website, Settlement term (none), and a date field (0 From invoice date). The bottom of the window shows 'ClientDetail' and '© 2025 Workwave UK Limited'.

# TIMESHEETS – EXTRAS AND BUDGETS

## Background

Timesheet extras can currently be viewed and amended for a timesheet employee or listed for all employees in a pay batch. A new feature has been added to enable timesheet extras to be viewed at timesheet level, i.e. for all employees in a timesheet.

Budgets and periodic budgets are currently displayed on timesheets in two separate grids on the Totals tab. They have now been merged onto a single grid.

Note that these changes only apply to these timesheet entry styles:

- Adjust by exception
- Manual entry
- Multi freq adj by exception
- Multi freq manual entry

## Timesheet Details

### EXTRAS

A new **Extras** tab has been added after the **Totals** tab.

| Payroll number | Employee name | Extra type   | Extra cost type | Date       | Quantity | Rate   | Extra value | Unit | Payslip text |
|----------------|---------------|--------------|-----------------|------------|----------|--------|-------------|------|--------------|
| 8722           | Ashton Burton | AB - Attenda | EXTRA - Extra   | 31/12/2024 | 16.00    | £5.00  | £80.00      |      |              |
| 8722           | Ashton Burton | BASIC - Bas  | EXTRA - Extra   | 31/12/2024 | 1.00     | £5.00  | £5.00       |      |              |
| 8722           | Ashton Burton | SPEC - Spe   | EXTRA - Extra   | 31/12/2024 | 16.00    | £10.00 | £160.00     |      |              |
| 8752           | Jesse Aguirre | AB - Attenda | EXTRA - Extra   | 31/12/2024 | 16.00    | £5.00  | £80.00      |      |              |
| 8752           | Jesse Aguirre | BASIC - Bas  | EXTRA - Extra   | 31/12/2024 | 1.00     | £5.00  | £5.00       |      |              |
| 8752           | Jesse Aguirre | SPEC - Spe   | EXTRA - Extra   | 31/12/2024 | 16.00    | £10.00 | £160.00     |      |              |
| 8752           | Jesse Aguirre | DEEP - Dee   | PERDS - Periodi | 31/12/2024 | 16.00    | £6.00  | £96.00      |      |              |
|                |               |              |                 |            | 82.00    |        | £586.00     |      |              |

This tab contains a list of all the timesheet extras for the timesheet that the user is authorised to see, with the same columns as the Pay Batch Extras list but without any site details. If the user is restricted to not see values, then the Rate and Extra value columns are not shown.

This new tab is secured to a new Timesheet.ListExtras function. At installation time, this function is added to the existing Payroll Administrator function group. It is the responsibility of the system administrator to assign this function to any other required function groups.

The separate **Timesheet** and **Periodic** tabs have been replaced by a single **Budgets** tab.

General

Close

Previous

Next

Save

Save

Ot...

HPA logs

Calculate HPA

Wor...

Add employee

Print/email timesheet

Apply furlough

Remove furlough

Periodic budget enquiry

Employee periodic monitor

Employees

Tick

Timesheet Details - Site timesheet -- NL2020 : Newsletter site

Site Details

Navigator

Cmp?

Payroll n

Employee

8722

Ashton Burton

8752

Jesse Aguirre

wk1 (25/11)

wk2 (02/12)

wk3 (09/12)

wk4 (16/12)

wk5 (23/12)

wk6 (30/12)

Totals

Extras

Totals

Hours

Pay

Basic

122.00

£854.00

Absent

-13.56

£-94.92

Cover

0.00

£0.00

Holiday

-6.44

£45.08

Bank holidays

-6.00

£29.70

Other

0.00

£0.00

Extras

£586.00

Periodic

0.00

£0.00

OVERALL

96.00

£1,332.78

Budgets

Timesheet budgets

OVERALL BUDGET

Hours

Pay

Budget

48.57

£340.00

Basic

122.00

£854.00

Delivered

108.44

£746.78

Variance to budget

59.87

£406.78

Variance to contracted

-13.56

£-107.22

Daily office cleaning -- Payroll -- W14674

Hours

Pay

Budget

48.57

£340.00

Basic

0.00

£0.00

Delivered

-7.44

£-52.08

Variance to budget

-56.01

£-392.08

Variance to contracted

0.00

£0.00

Periodic budgets

Periodic

Period

01/12/2024 to 31/12/2024

Budget

£123.00

Actual

£0.00

This timesheet

£96.00

Total

£96.00

Variance

£-27.00

Exception comment

2 entries

TimesheetDetail1

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The Timesheet budgets and the Periodic budgets that the user is permitted to view are shown in discrete sections in a single view. The details shown and the colour coding employed have not changed from the previous version. Note that the sections are collapsible to aid navigation.



# TIMESHEET EMPLOYEE – LEFT COMPANY NOTE

## Timesheets

When TemplaCMS determines that an employee has left the company during the effective period of a timesheet, then the LC adjustment is applied to all dates after the leaving date.

A note will is now added to the Timesheet Employee to record when this happens.

Example note:

Timesheet employee Notes - Employee timesheet -- Terry Smith

General

Close Save Save and new Print Excel

Navigate Save Other

| Classification | By | On         | At       |   |
|----------------|----|------------|----------|---|
| 2 - Low        | BH | 22/10/2025 | 15:31:34 | Employee left date detected - 20/02/2022. Marked as Left Company from following working day |

New Note

Classification (select one)

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# TIMEGATE+ SYNC FAILURE ALERTS

## Timegate+ Sync Failure Alerts

When an entity (e.g. employee, customer, supplier, etc.) fails to sync from TemplaCMS to Timegate+ or from Timegate+ to TemplaCMS, then a record is added to the Timegate+ Sync Failures list.

The responsible user(s) defined on the Timegate+ external system is now alerted when this happens. The user(s) can then check the list and take the necessary steps to resolve the issue.

Example Alert message:

The screenshot shows a web application window titled "Alert Details". It features a blue header bar with a "General" tab. Below the header, there are navigation buttons: "Close", "Previous", "Next", and "Delete". A "Navigate" button is also present. The main content area displays an alert message with the following details:

- From:** Templa-CMS master user
- To:** Bil Harding
- Subject:** Templa-CMS to Timegate+ sync FAILURE
- Sent:** 03 October 2025 11:28:20

The body of the alert contains the text: "Employees entity sync failure - TemplaCMS : Entered payroll number already exists". The footer of the window shows "AlertDetails" on the left and "© 2025 Workwave UK Limited" on the right.

# TIMEGATE/TIMEGATE+ SUPPRESS SCHEDULING TRANSFER

## Background

The TemplaCMS External System for Timegate or Timegate+ has an option to **Suppress scheduling transfer**, which prevents ALL shifts/duties from being sent out. This option can now be controlled at Site level.

## External Systems

For clarity, the existing **Suppress scheduling transfer?** option has been renamed to **Suppress all scheduling transfer**. If selected, then shifts are not sent out, and the settings at site level are ignored.

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

☐ Reconcile log entries by task? ☐ Prevent reassess of auto generated TA absences?  
☒ Apportion log entries across tasks? ☐ Apply cover only on non-contracted days?  
☐ Reconcile log entries by employee type? ☐ Recalculate auto-adjustments on contract fix up?  
☐ Auto generate TA absences? ☐ Restrict timesheet adjustment amendments to payroll users?  
☒ Use batch shift build process?  
☒ Roster management in Timegate?  
☒ **Suppress all scheduling transfer?**  
☐ Allow multi-site clock in?

Geofence radius (metres)

Shift export advance  Days

Default shift

Default non-contracted employee type

Shift buffer details

Primary buffers - minutes either side of scheduled start  end  Secondary buffer - minutes after primary

☒ Allow booking outside buffer window

Mark shift as flexible when timespan  minutes longer than contracted hours

ExternalSystemDetail © 2025 Workwave UK Limited

## Sites

The new **Suppress scheduling transfer** option has been added to the **Overrides** pane of the **Time and Attendance** tab for Sites that use either Timegate or Timegate+.

The screenshot shows the 'Site Detail - The School' window. The 'General' tab is selected, and the 'Time and attendance' sub-tab is active. The 'Overrides' pane is expanded, showing the following settings:

- System:** Timegate+
- Processing option:** Memorandum
- Site reference:** (empty field)
- Unique site id (SIN):** 16
- Shift live from:** (not set)
- Multi-site building:** ☐ Managed building?
- Building reference:** (empty field)

Below these settings, the 'Overrides' pane is expanded, showing the following options:

- Shift buffer overrides to external system defaults:**
  - Primary buffers - minutes either side of scheduled:** start (empty), end (empty)
  - Secondary buffer - minutes after primary:** (empty)
  - Allow booking outside buffer window:** No
- Log import:**
  - ☐ Override external system?
  - Tolerance % above:** 0.00%
  - Tolerance % below:** 0.00%
  - Tolerance mins above:** (empty)
  - Tolerance mins below:** (empty)
- ☒ **Suppress scheduling transfer?** (highlighted with a red box)

The bottom of the window shows a 'Memo' section and a footer with 'SiteDetail' and '© 2025 Workwave UK Limited'.

## Timegate and Timegate+ Duty Export

When sending out shift/duty details for a site from TemplaCMS to either Timegate or Timegate+, if either the Site or the External System is set to suppress scheduling transfer, then shift/duty details are not sent out.

## LOG NUMBERS

This enhancement update contains the following log numbers:

**WI5275**

**WI6121**

**WI6122**

**WI6153**

**WI6193**

**WI6293**



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](https://teamsoftware.com).