TEAM Software by WORKWAVE

TemplaCMS Newsletter

V6.1.0 | Update 2025.10 | October 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.

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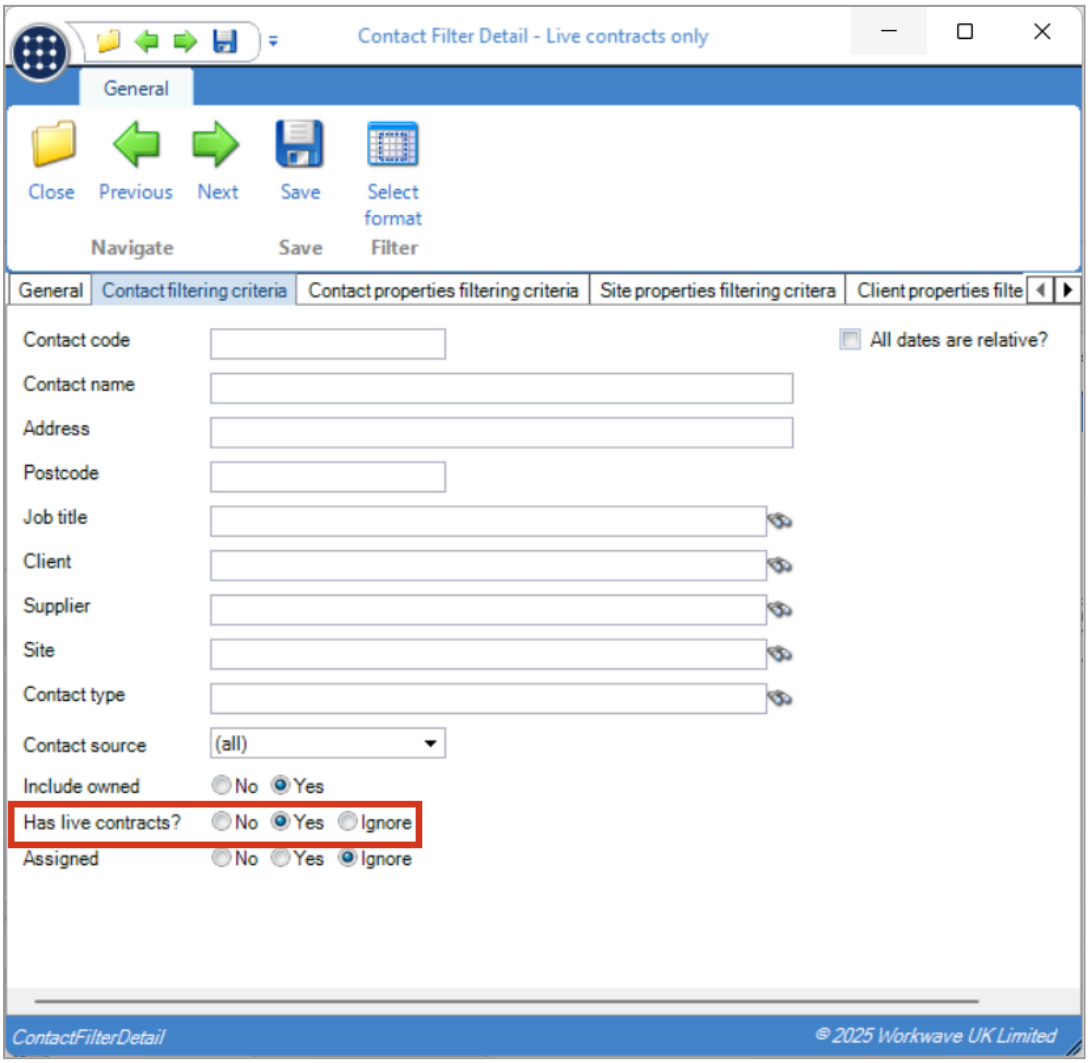
Contacts and Contact Structure Lists

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.



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.

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Open Finance Client and Supplier Codes

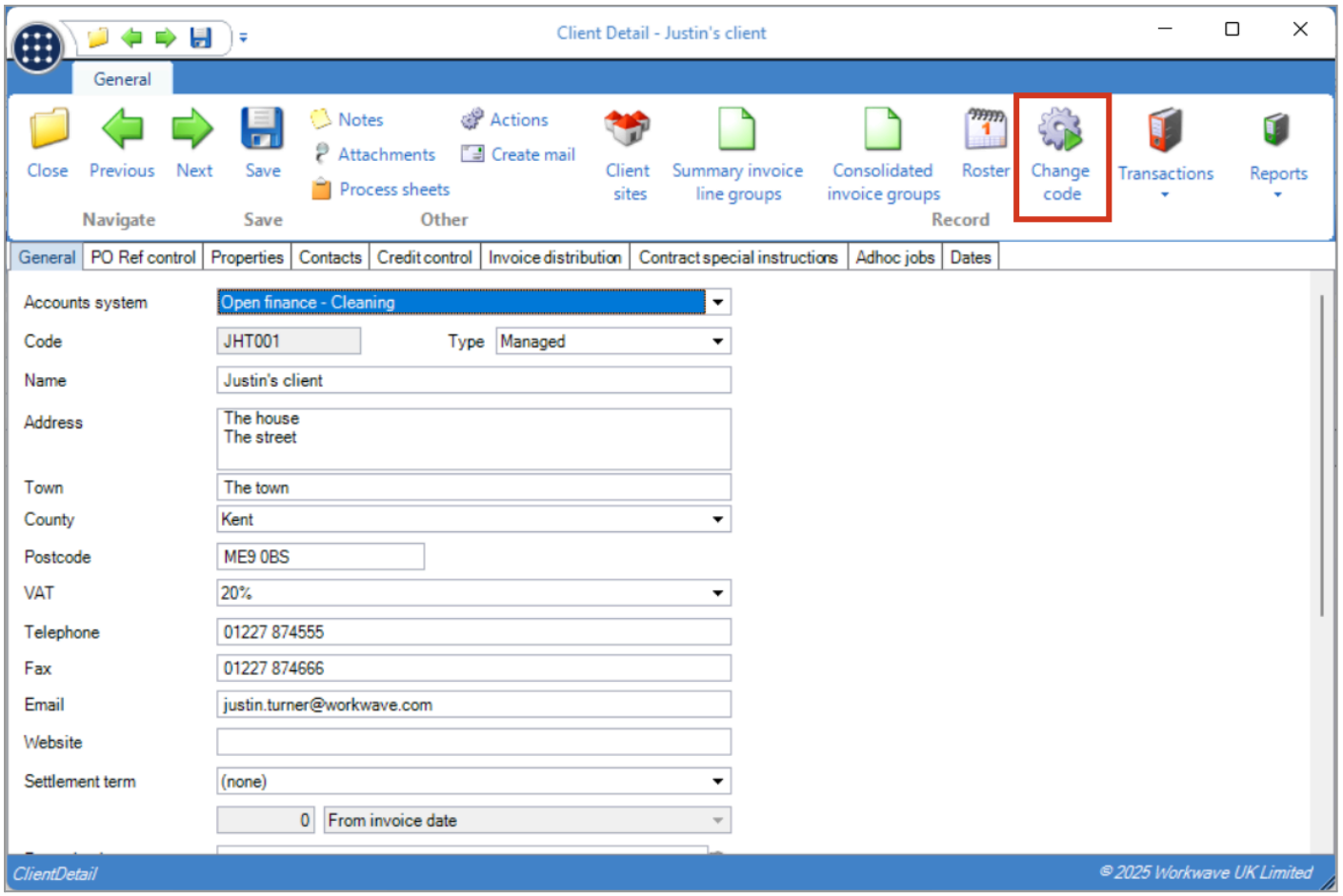
Background

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.



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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.

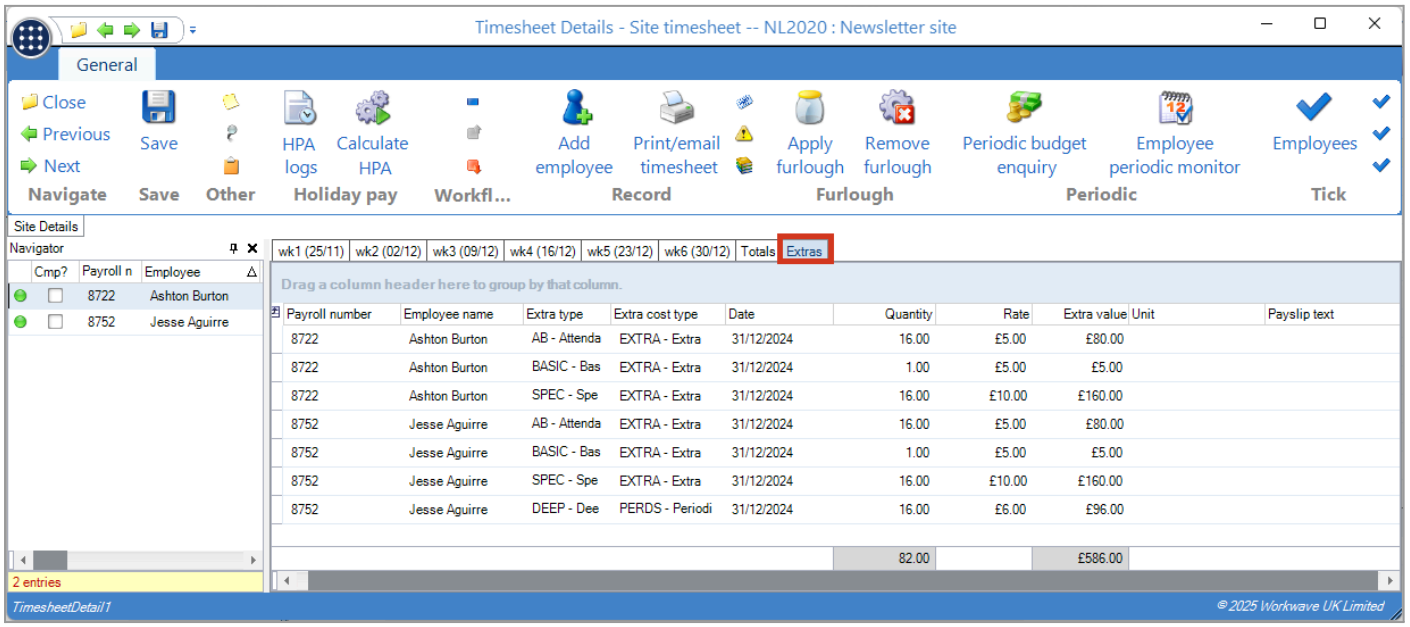
Note that these changes only apply to these timesheet entry styles:

- 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.



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.

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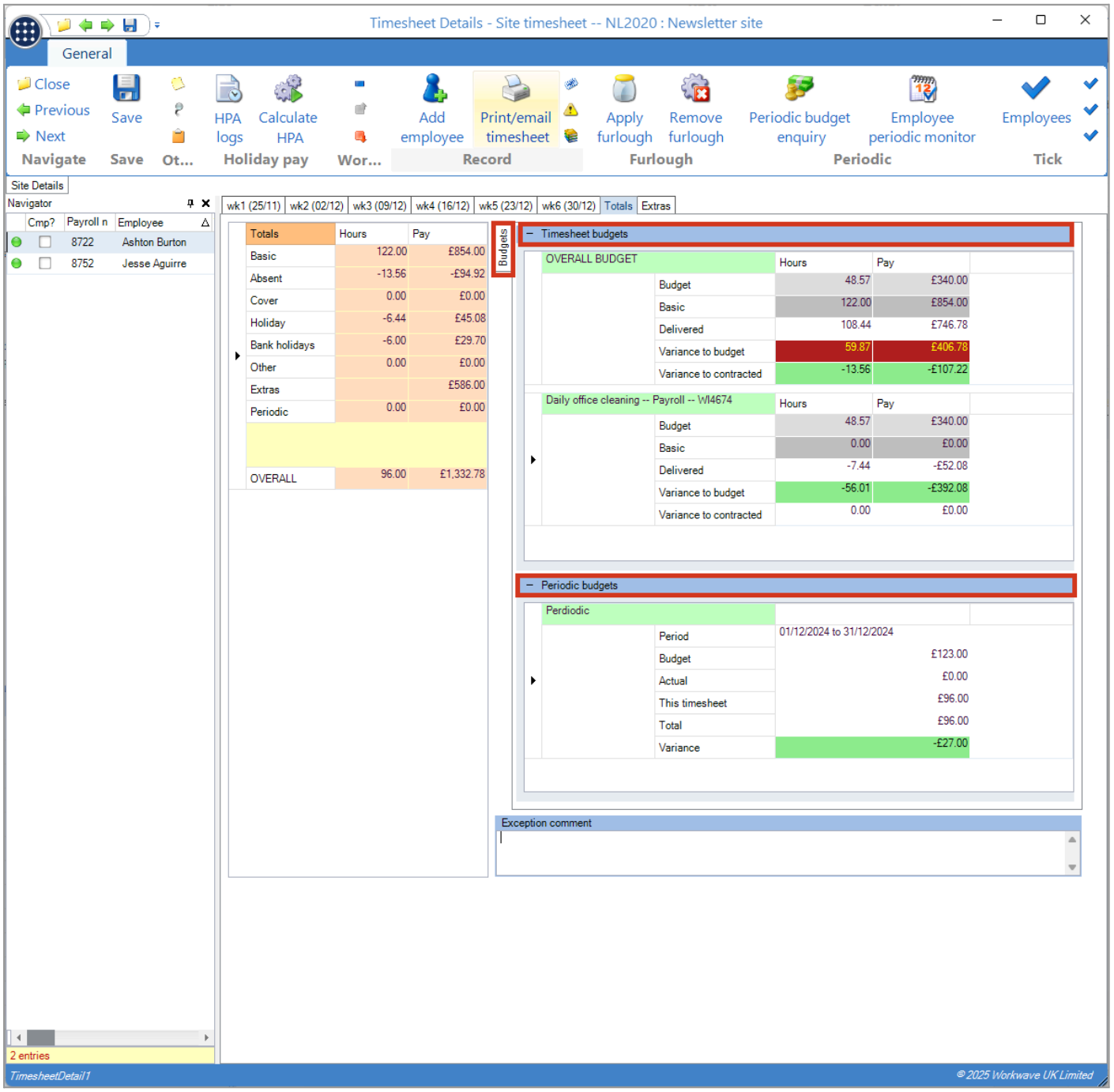
Budgets

The separate **Timesheet** and **Periodic** tabs have been replaced by a single **Budgets** tab.



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.

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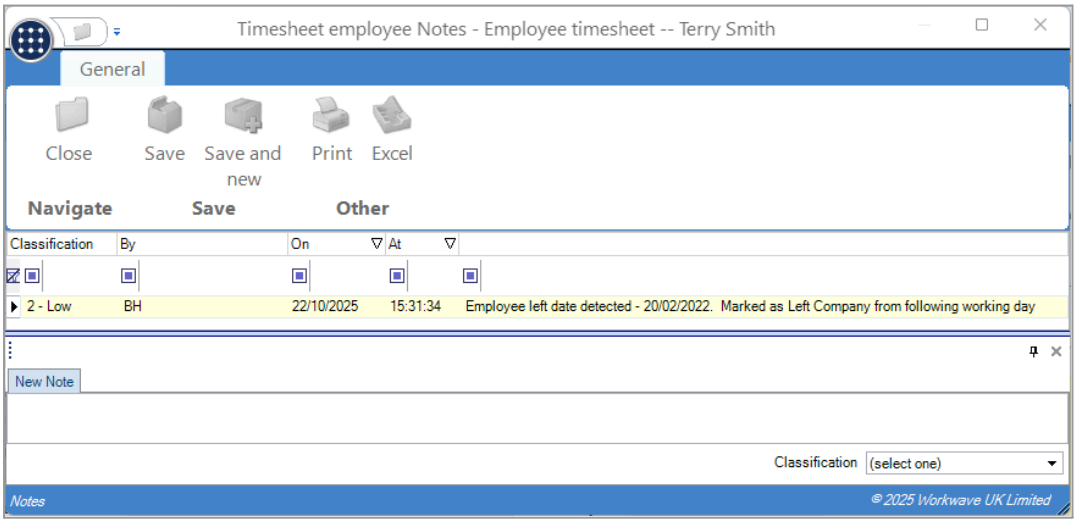
Timesheet Employee – Left Company Note

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:



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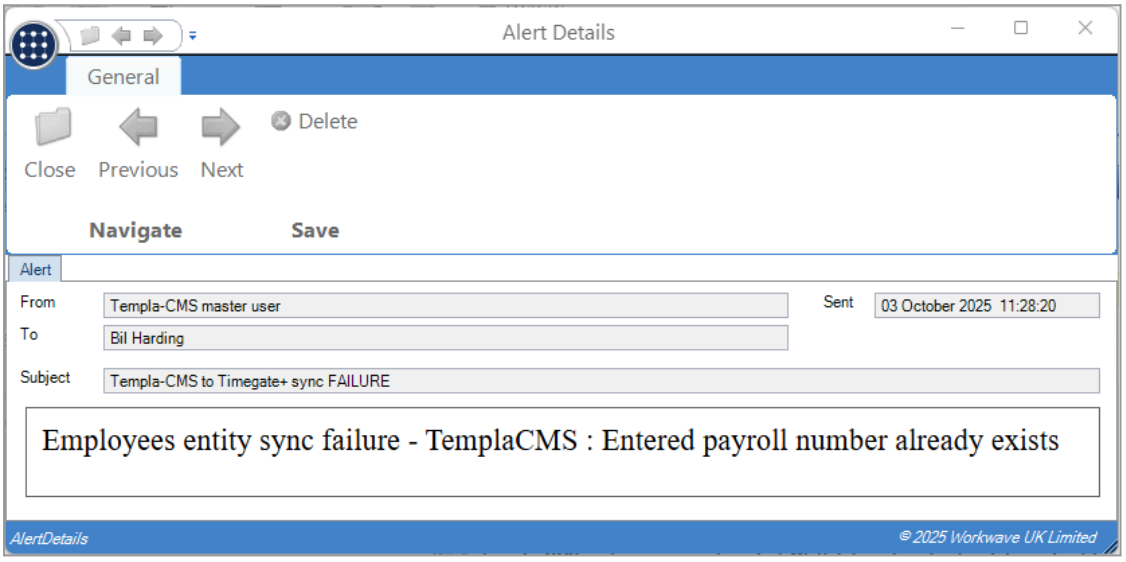
Timegate+ Sync Failure Alerts

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:



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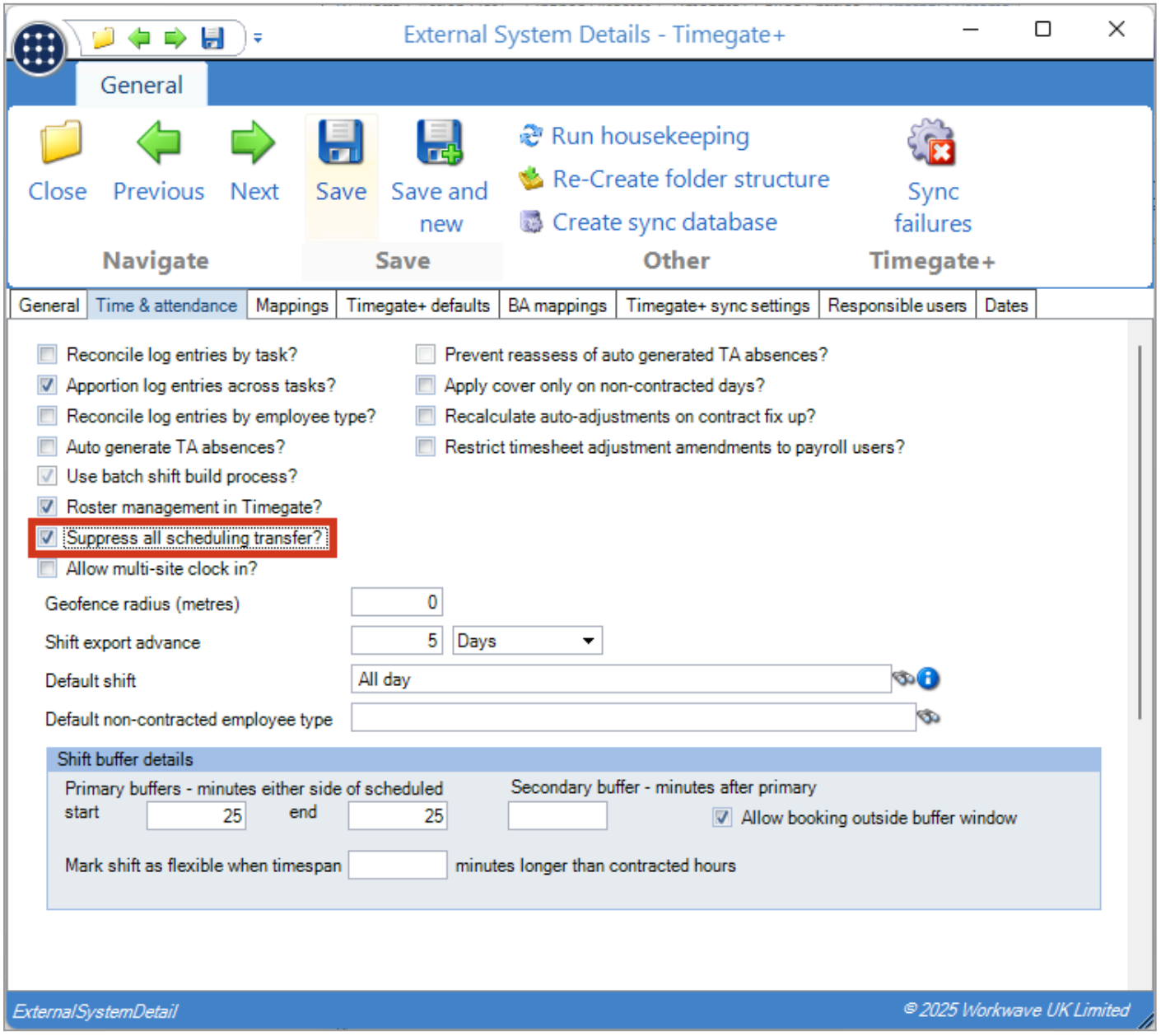
Timegate/Timegate+ Suppress Scheduling Transfer

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.



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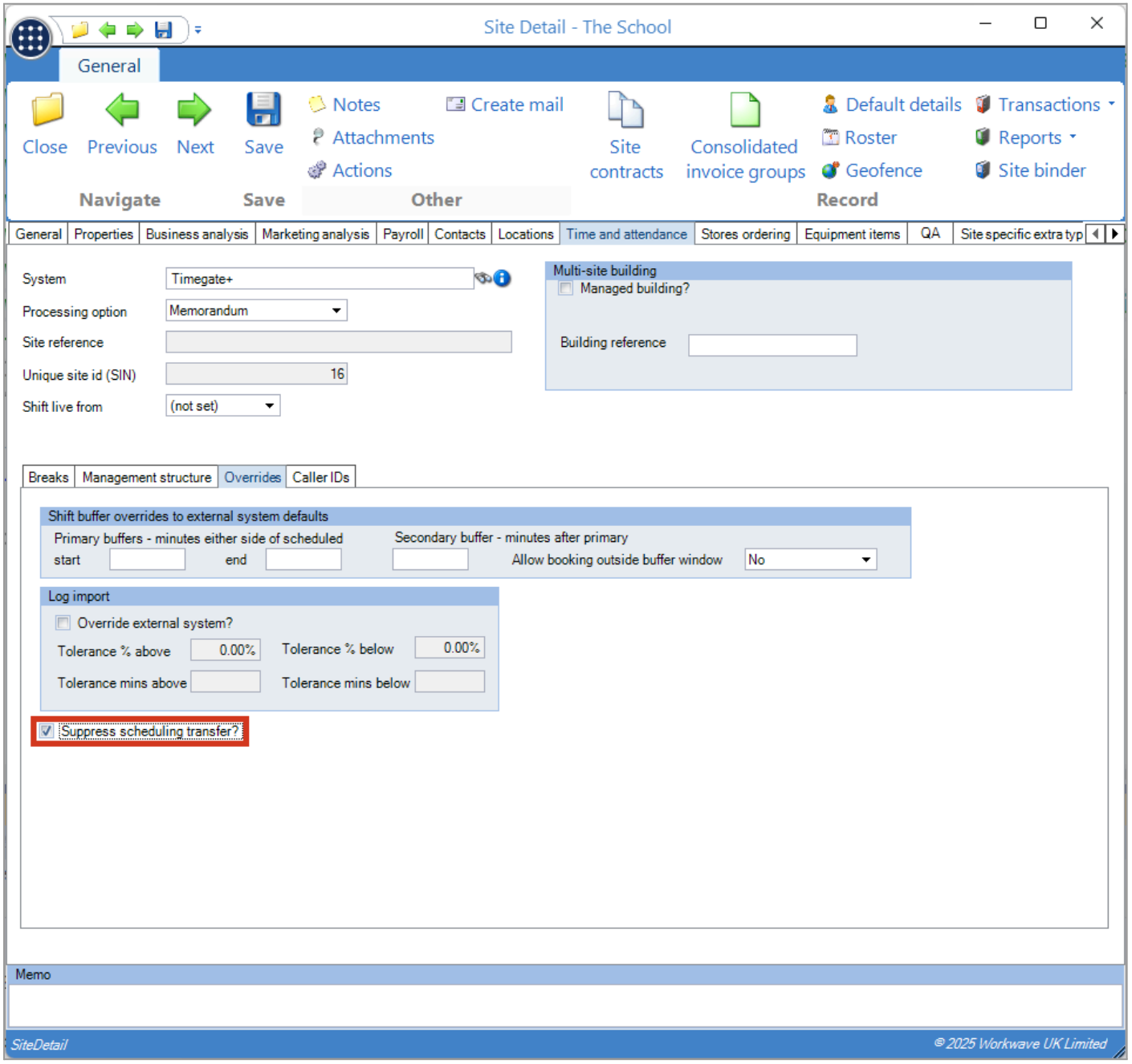
Sites

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+.



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.

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Log Numbers

This enhancement update contains the following log numbers:

WI5275

WI6121

WI6122

WI6153

WI6193

WI6293

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TEAM Software

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