TemplaCMS Newsletter

V6.1.0 | Update 2025.11 | November 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 setup 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.

JOURNALS: CHANGE POSTED PERIOD

Background

It is possible for a suitably authorised user to amend the period on a posted journal either from the Journal Header Detail form itself or by selecting one or more journals from the list and amending the period in bulk. The function assignments for the detail form and list have now been split.

Functions

A new **JournalEntry.MultiPeriodAmend** has been added:

St	Code	Description
☑ ☑	journal	☑ period
	JournalEntry.PeriodAmend	Journal - Amend financial period
	JournalEntry.MultiPeriodAmend	Journal - Amend multiple financial periods

At installation time this new function will be added to any function group that already contains the existing **JournalEntry.PeriodAmend** function. It is the responsibility of an administrator to remove/assign this function as required.

Journal List

The ability to use the journal list **Change posted period** taskbar option is now tied to the function **JournalEntry.MultiPeriodAmend**. Note that the new function is used exclusively on the list, even if a single journal header is selected to have its financial period changed.

This function split has only been applied to journals. Other areas where changing posted period is available are unaffected.
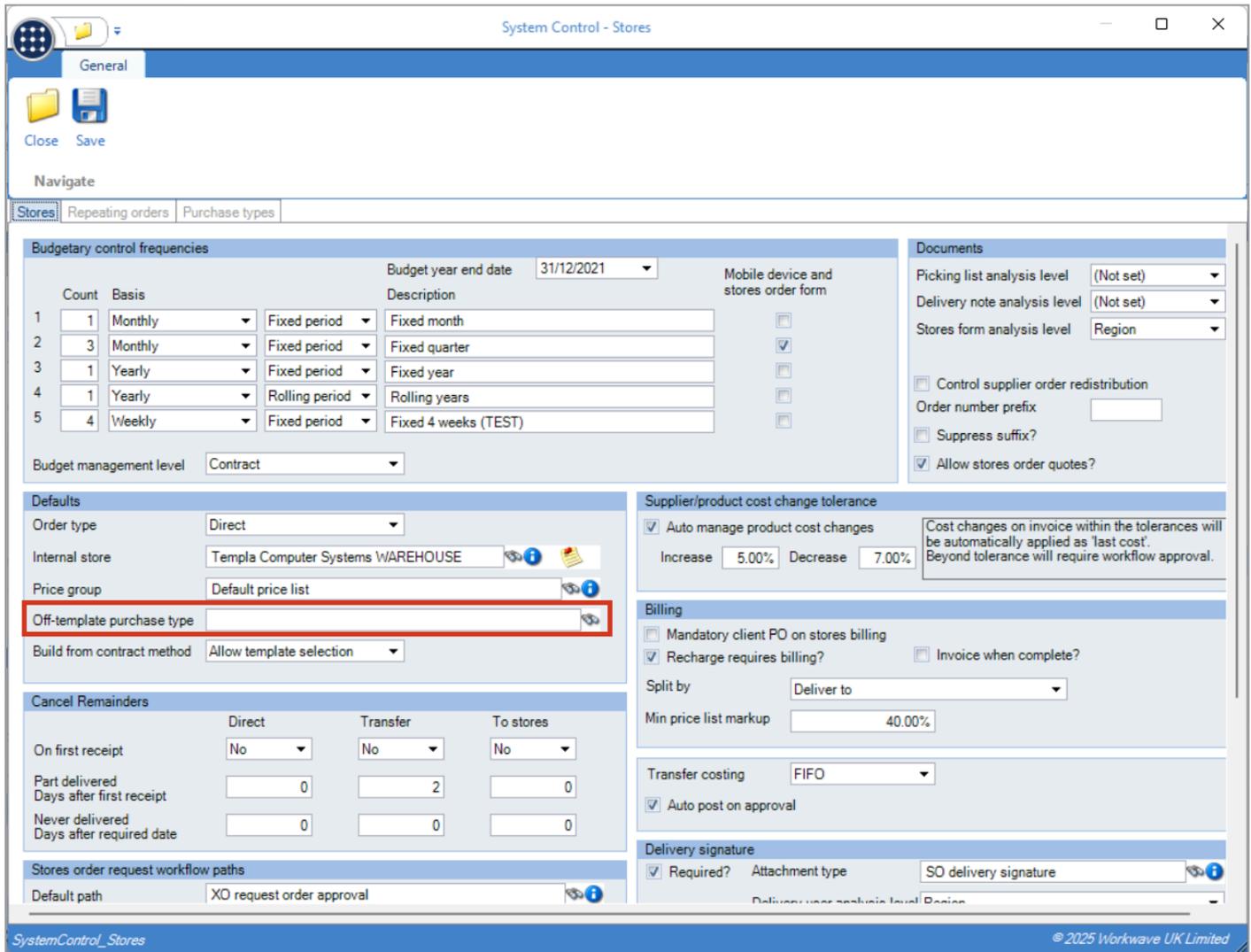
STORES ORDERING: OFF-TEMPLATE PURCHASE TYPE

Background

When a user adds a product to a stores order directly rather than selecting from a contracted stores template the purchase type has always defaulted to **Recharge**. It is now possible to define a default for this scenario, allowing either another purchase type to be specified, or indeed no purchase type – thus forcing the user to make a decision about the point of ordering.

System Control

A new option has been added to System Control > Stores.

This option allows any purchase type or no purchase type to be selected.

At installation time, this is set to the current Recharge purchase type.

Stores Ordering

When entering an off-template product on either a stores order or a multi-site stores order, the new off-template purchase type is defaulted onto the order line when previously the purchase type would have defaulted to recharge. If no off-template purchase type has been set, the purchase type now defaults to not set and must be entered by the user.

EMPLOYEE MOVEMENTS: BULK APPROVAL OF EMPLOYEES

Background

Previously, the Employee Approval process was restricted to individual updates. This could be time-consuming when multiple employees added to site timesheets require approval.

Unapproved Quick Filter

A new **Unapproved** filter button has been added to the Employee Movements toolbar. When this button is selected, only unapproved Employees are displayed in the grid. To reset the view, the **All** quick-filter button can be used.
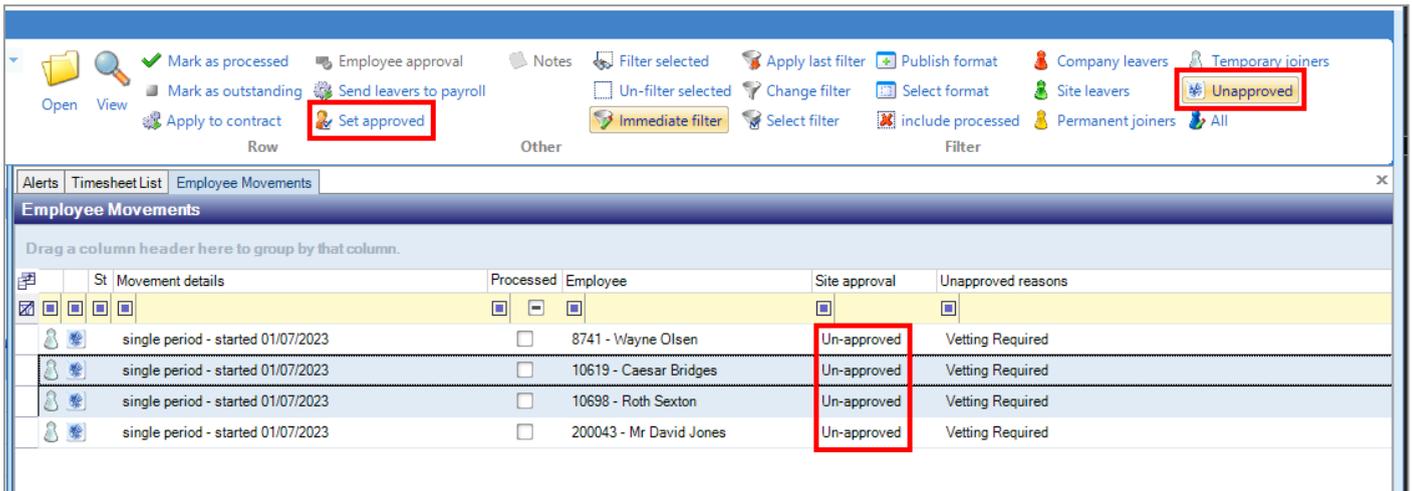
Set Approved Button

A new **Set approved** button has been added to allow multiple Employees to be approved quickly. Access to this button is controlled by the below new function:

At installation time, this is not assigned to any function groups, so it is the responsibility of an administrator to assign as needed.

When the button is clicked, a pop-up window is displayed allowing the action to be confirmed or cancelled.

If confirmed, the process is on each employee in turn with no further user interaction required. Upon completion or approvals, the Employee Movements grid is automatically refreshed.

HS Contract Route Details report

Background

The HS Contract Route Details report has been enhanced to show the detail of products within each service, allowing users to verify the makeup of the client charges.

HS Contract Route Details Report

On installations where the Billing level is set to **Product** in System control > Hygiene services, the following changes have been made to the report.

New rows have been added so that each product that comprises a service detail line is shown on a new row. On these product rows, the Client charge column shows the price of the products at the billing frequency.

New columns have been added for:

- Product description
- Product quantity (at the detail frequency)
- Annual unit charge (not shown for service rows)
- Total annual charge

The report is shown here with the standard grouping on Reference, and some columns have been hidden.

Note that the Totals shown at the bottom of the grid and on the group are the totals of the Service lines, i.e. they do not include the product line values.

In this example, on the second product line for the first service (HS air freshener (8 weekly)), the unit price is £12.
£12 every 8 weeks is £78 per year (the **Annual unit charge**), the quantity is 2 so the **Annual unit charge** is £156.
£12 every at the service billing frequency is £6.50 per month, the quantity is 2 so the **Client charge** is £13 per month.
The contract HS billing screen for this is shown below for reference.

Ad Hoc Job Reversal

Background

Ad hoc job reversal allows elements of ad hoc jobs to be reversed. This can include pay and commission, so further control and reporting is required to handle reversals for employees who have left the company.

Workflow Paths

On workflow paths of type **Adhoc reversal**, a new rule type of **Adhoc Job-Has irrecoverable pay** is now available.
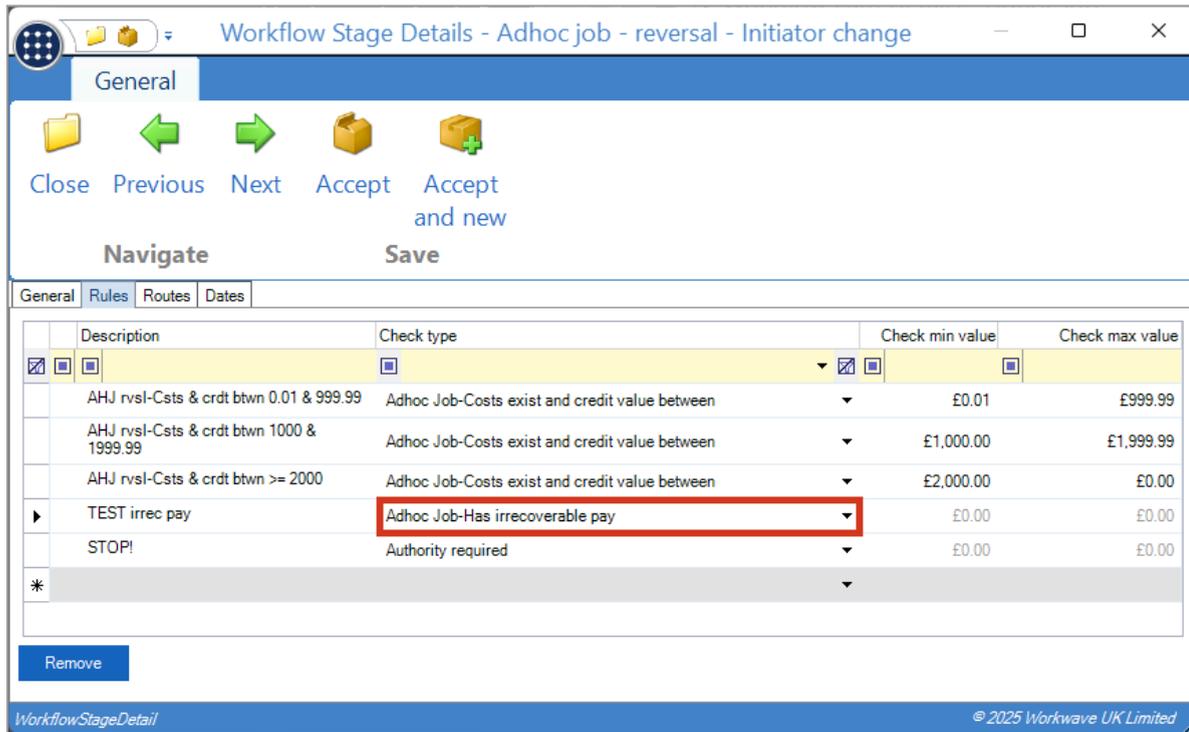
Ad Hoc Job Reversal

When an ad hoc job is sent for reversal approval and the new rule exists on the workflow path's stage, the job is checked to see if there are any unpaid, negative employee payments where the employee has now left the company. If so, the ad hoc job reversal is routed to the appropriate authorising user.

Ad Hoc Job Negative Payments

A new **Adhoc job negative payments** report has been added. The report has been added to the **Workbills** section of the navigator for users with authority to ad hoc jobs.

The report filtering allows the below selections:
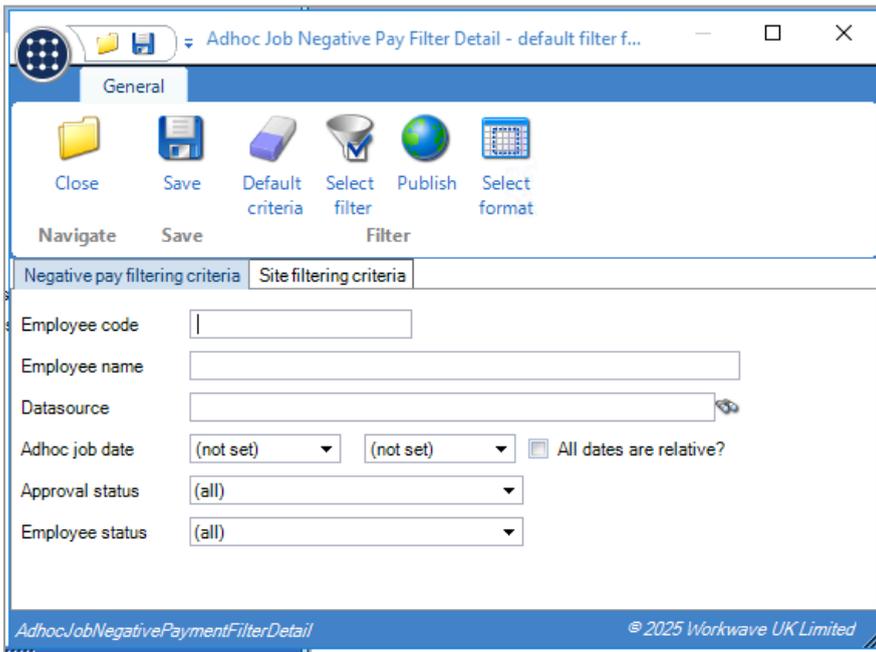
The normal filter selection and publication functions are available.

When the filter is applied, all relevant negative payments are displayed in the grid.

Microsoft 365 Email Provider

Background

We have added support for Microsoft 365 as an Email Provider. This new integration utilizes the Microsoft Graph API and Microsoft Entra ID to provide a secure, modern connection. By moving away from older authentication methods, this update enhances security and improves email deliverability, ensuring emails are less likely to hit spam filtering on target systems.

Configuring Microsoft 365 System

INTRODUCTION

This guide explains how to generate the **Tenant ID**, **Client ID** and **Client Secret** required to connect our application to the user's Microsoft 365 instance.

This process involves creating an *App Registration*. It can be helpful to think of this as a user which is accessed by an application rather than a person. Instead of a username and password, an App Registration uses a Client ID and Client Secret. It can be given permissions / privileges in the same way that a normal user can.

PREREQUISITES

- Access to the Microsoft Entra admin center for your organisation
- Global Administrator or Cloud Application Administrator privileges

STEP 1: REGISTERING THE APPLICATION

1. Log in to Microsoft Entra admin center (https://entra.microsoft.com).
2. Navigate to Entra ID > App registrations.
3. Click **New Registration**.
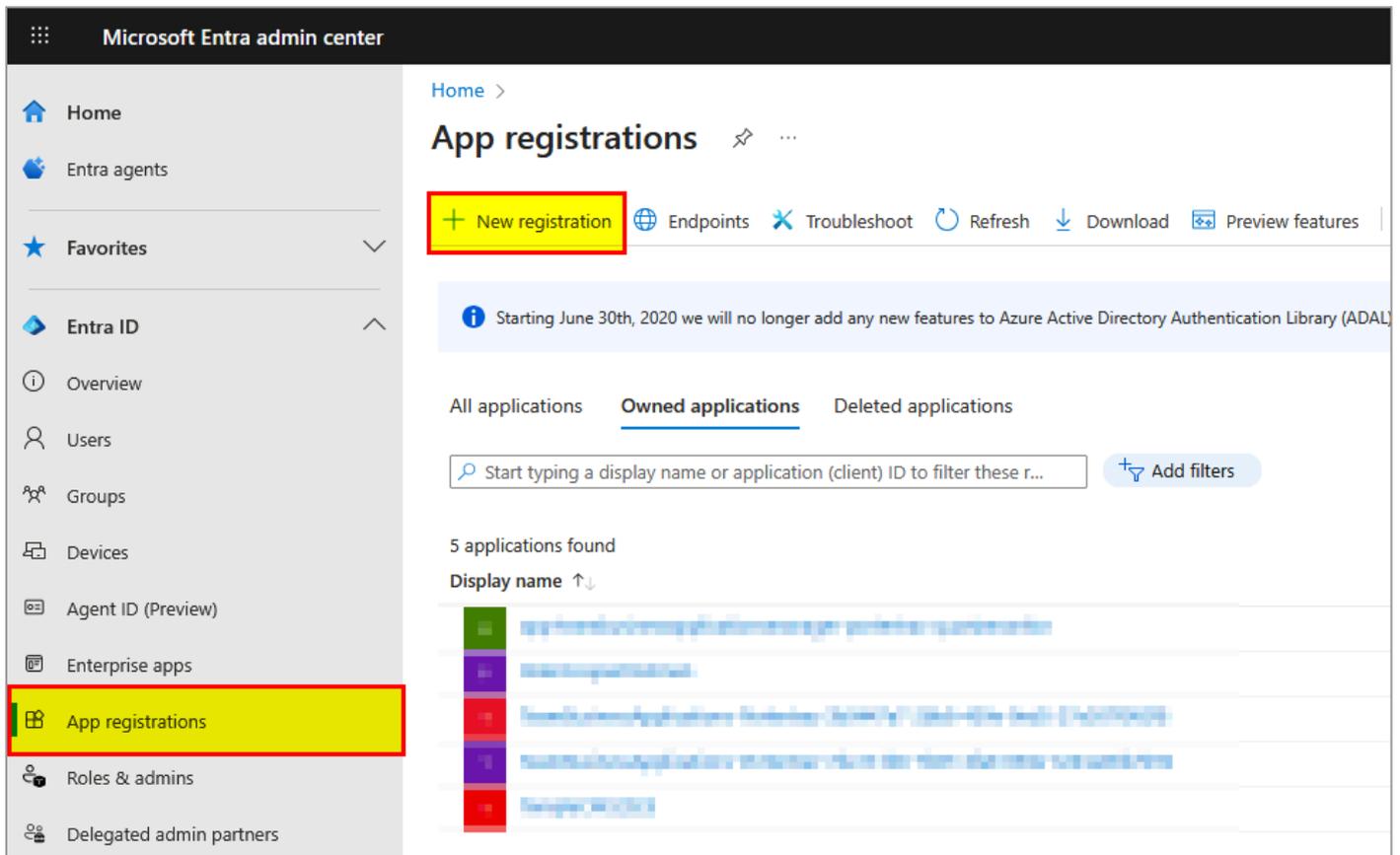
4. Complete the registration details:
   a. **Name** — Enter any meaningful name e.g. "TemplaCMS Emailer".
   b. *Supported Account Types* — Select **Accounts in this organizational directory only**.
   c. **Redirect URI** — Leave blank.
5. Click **Register**.

STEP 2: RETRIEVING TENANT ID AND CLIENT ID

Once the new application is successfully registered, the overview page displays. Users can copy the Application (client) ID and Directory (tenant) ID to a secure location. These are required later.

STEP 3: GENERATING A CLIENT SECRET

1. Click **Add a certificate or secret on the App Registration** overview page (screenshot above).
2. Click **New client secret**.
3. Fill in the client secret details:
   a. **Description**   Enter any meaningful description e.g. "TemplaCMS Emailer Secret".
   b. **Expires**   Choose an expiry duration for the secret based on your security requirements.
      i. **Note:** Users must rotate this secret before it expires to maintain service continuity.
4. Click **Add**.
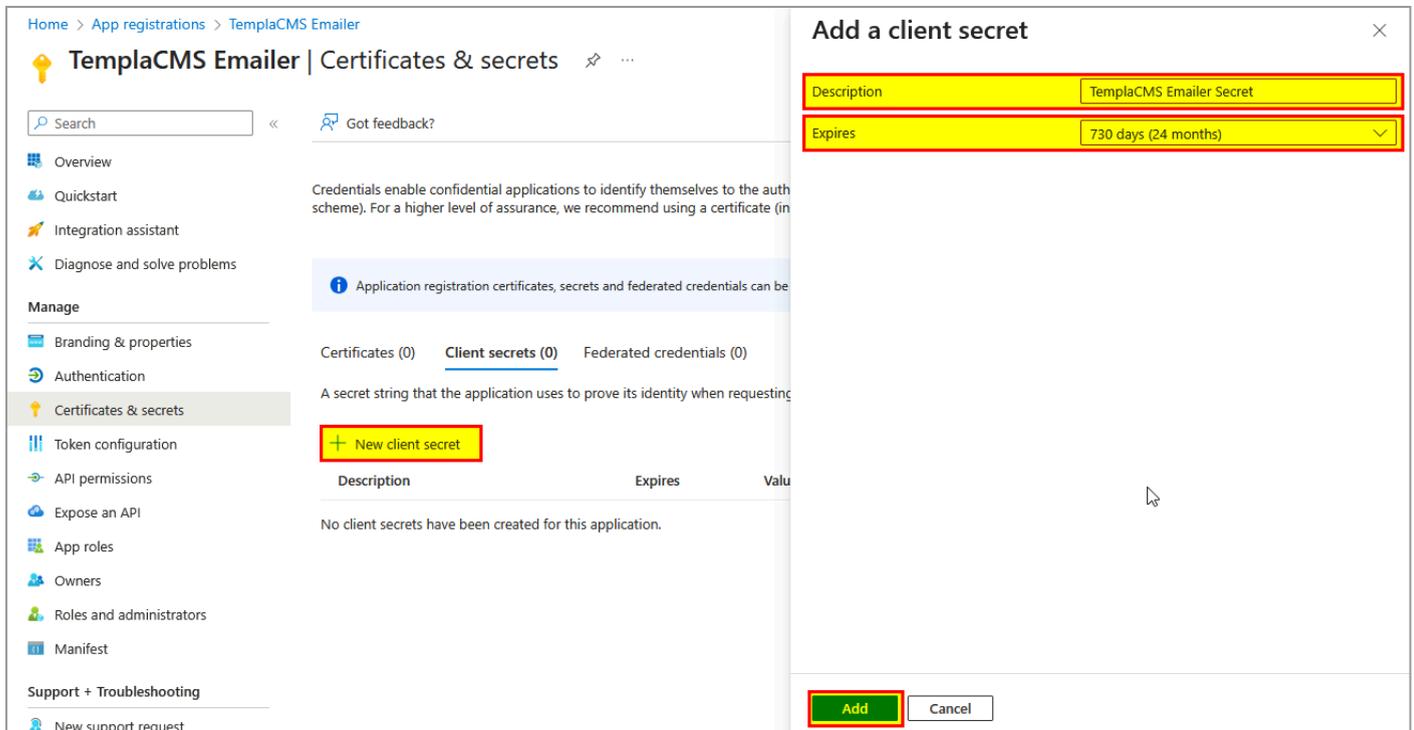
STEP 4: COPY CLIENT SECRET

Once users click **Add** in the previous step, the certificate is generated, and the Client Secret (value) is displayed.

IMPORTANT: Copy the Value column, NOT the Secret ID. The Value is hidden forever once navigated away.
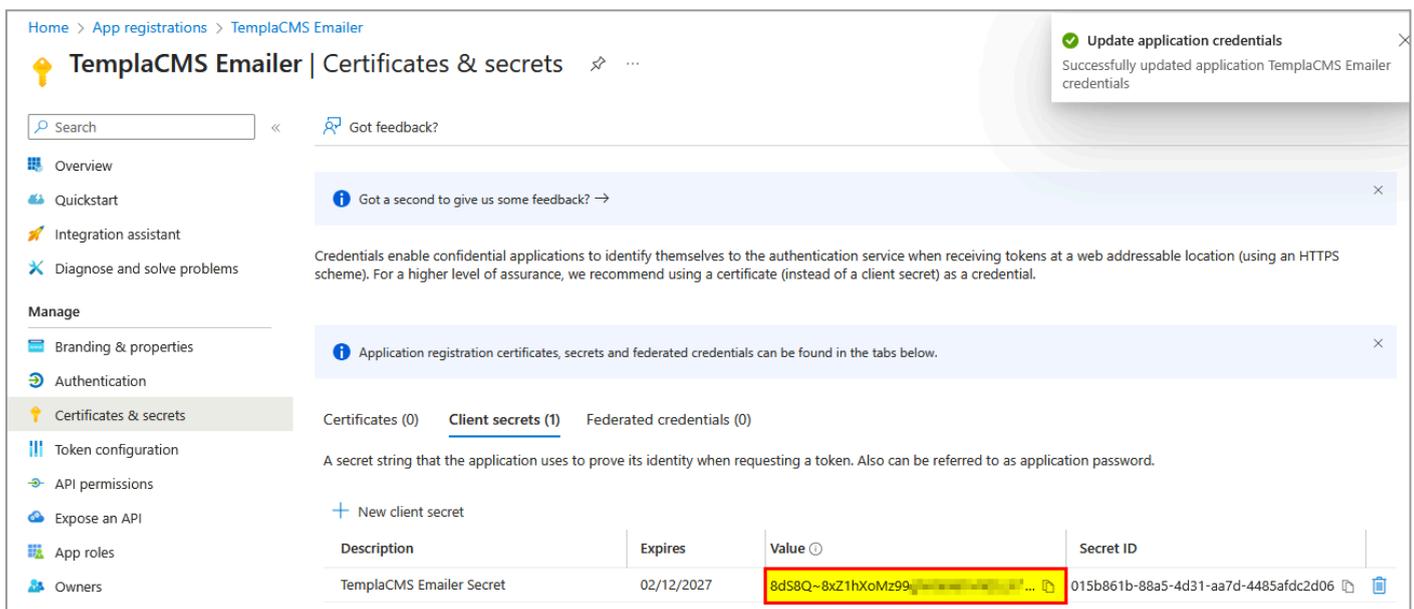
STEP 5: CONFIGURING PERMISSIONS

1. Click **API permissions**.
2. Click **+ Add a permission**.

3. Select **Microsoft Graph**.

4. Select **Application Permissions**.
5. Search for "Mail.Send".
6. Select the **Mail.Send** permission box.
7. Click **Add Permissions**.

Request API permissions

‹ All APIs

Microsoft Graph
https://graph.microsoft.com/   Docs

What type of permissions does your application require?

Delegated permissions
Your application needs to access the API as the signed-in user.

Application permissions
Your application runs as a background service or daemon without a signed-in user.

Select permissions

🔍 Mail.Send

Permission

⌄ Mail (1)

☑   Mail.Send ⓘ
Send mail as any user

Add permissions   Discard

8. Click the **Grant admin consent for [Organization Name]** button. This is required for Application Permissions to function. Confirm **Yes** when prompted.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent
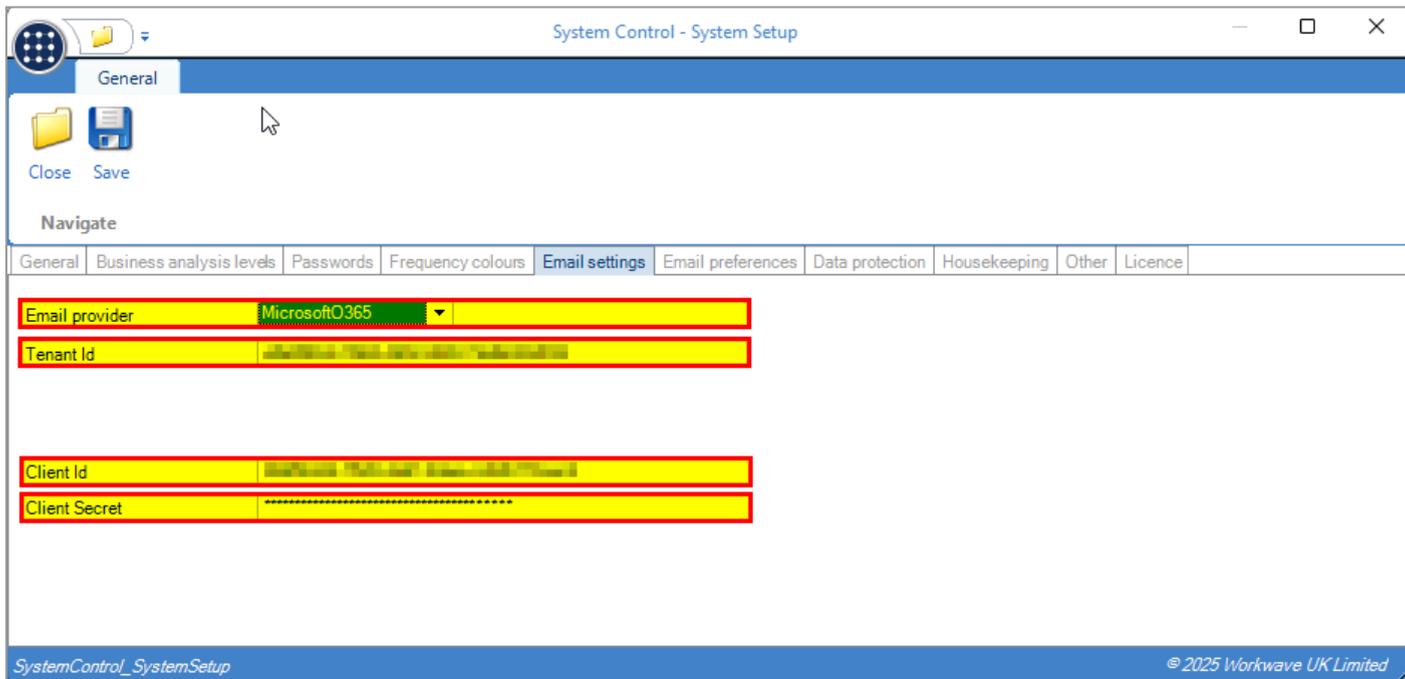
+ Add a permission   ✓ Grant admin consent for [redacted]

API / Permissions name	Type	Description	Admin consent requ...	Status	
∨ Microsoft Graph (2)					•••
Mail.Send	Application	Send mail as any user	Yes	⚠ Not granted for [redacted]	•••
User.Read	Delegated	Sign in and read user profile	No		•••

Configuring Templa CMS

The user should now have their three values - Tenant ID (also known as Directory ID), Client ID (also known as Application ID) and Client Secret Value.

1. Open *System Control > System Setup*.
2. Access the **Email Settings** tab.
3. Select "MicrosoftO365" from the **Email provider** drop-down list.
4. Paste the saved values into the appropriate boxes.
5. Click **Save**.

Log Numbers

This enhancement update contains the following log numbers:

WI6263

WI6265

WI6514

WI6299

WI6266

WI6267

TEAM Software