TEAM Software by WORKWAVE

TemplaCMS Newsletter

V6.1.0 | Update 2025.04 | April 2025

COMMERCIAL STATEMENT

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Table of Contents

Introduction **4**

Training 4

Invoice Line List – Additional Source Information **5**

Background 5

Invoice Line List 5

P&L Template – Additional Budget Controls **6**

Background 6

P&L Template 6

Log Numbers **8**

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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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Invoice Line List – Additional Source Information

Background

Invoice lines can originate from various sources, including ad-hoc jobs, stores orders, and workbills. These are collectively referred to as the invoice line's source. Previously, multiple separate fields identified who created the source record and when.

Invoice Line List

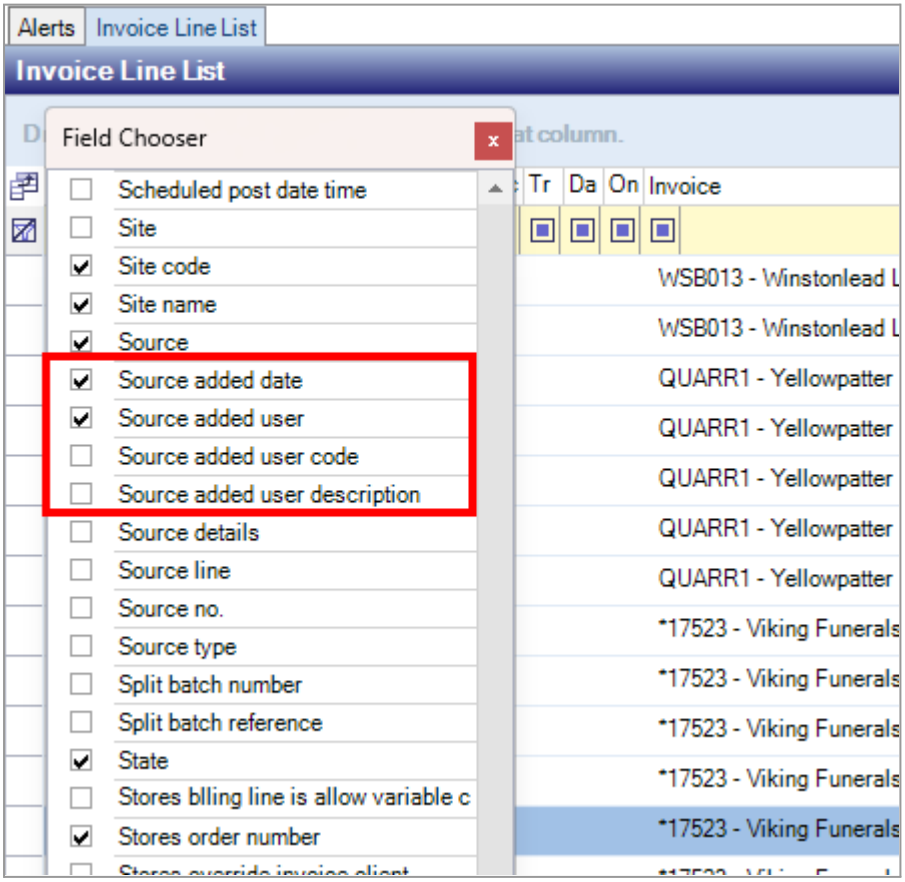
Relevant data from different source records has been streamlined into four new columns:

- Source added date
- Source added user
- Source added user code
- Source added user description

By default, **Source added user** and **Source added date** are displayed on Invoice Line grids, though individual user's settings may override this.

These new columns replace and supersede the previously available fields:

- WB/SO added user, user code, and user description.
- Workbill added user, user code, and user description.
- Stores order header added user, user code, and user description.



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P&L Template – Additional Budget Controls

Background

Previously, the P&L Template allowed configuration of budget columns (Value, Variance, and Variance %) via a single global setting, applying the same configuration to all sections of the report. Decimal precision could also be defined globally. Thus, if the template enabled budgets, the columns would be shown for every actual column shown.

P&L Template

This configuration has now been refined to allow more granular control. The global Budget panel has been removed and replaced with individual Budget buttons for each section of the P&L Template.

- Clicking a Budget button reveals the budget settings specific to that section of the report.
- The budget settings themselves (column types and decimal places) remain unchanged.
- A green Budget button indicates that one or more budget options are enabled for that section.
- A blue Budget button indicates that no budget columns are enabled.

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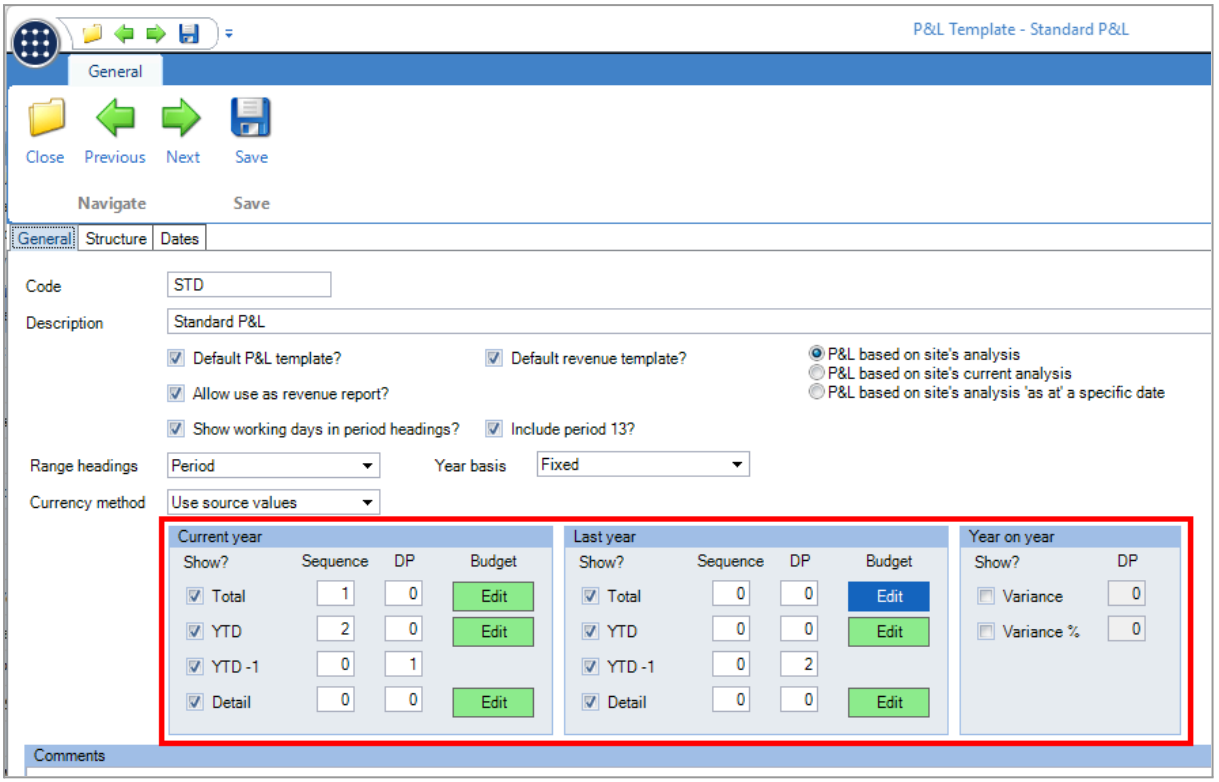
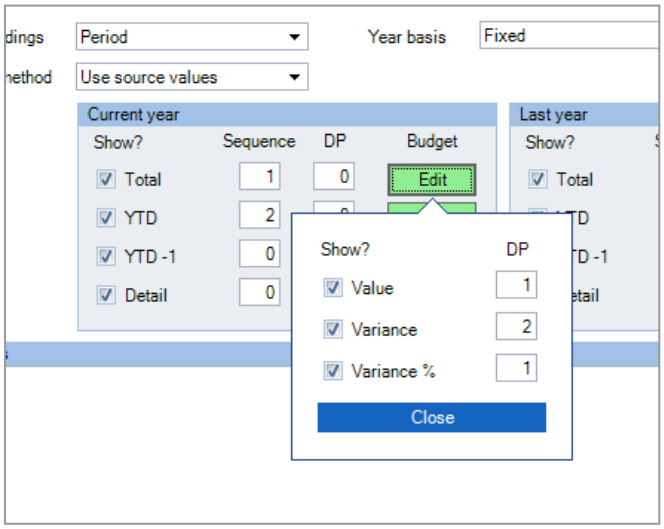
During upgrade, any existing global budget settings are automatically copied into each individual section to preserve current behavior.





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Log Numbers

This enhancement update contains the following log numbers:

WI5427

WI5357

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TEAM Software

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