

TemplaCMS Newsletter

Update v26.5

COMMERCIAL STATEMENT

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INTRODUCTION

This document details changes made to TemplaCMS and features added in update v26.4.

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 the full understanding of the implications for set-up and use is 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.

OPEN FINANCE/OPEN PAYROLL ALERTS

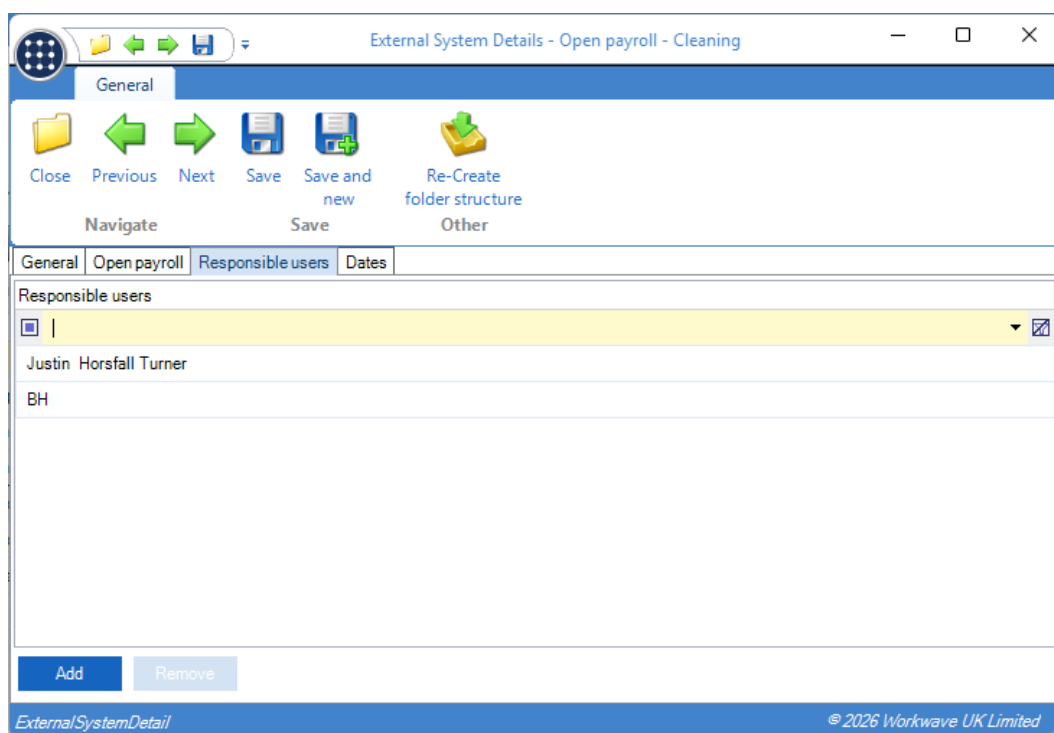
Background

When using the Open Finance or Open Payroll Templa Connector middleware to integrate to a third party application (e.g. Sage Intacct, Xero, Employment Hero), errors on the API calls either to the third party or to TemplaCMS can be seen using the specific Connector Audit reports installed in the Query function. This therefore required a user to actively look for problems.

Automatic alerts have now been implemented, meaning responsible users can be pro-actively alerted/emailed when errors occur.

External System

As with all other **External System** definitions within TemplaCMS, it is possible to nominate a list of responsible users for those setup to handle the Open Finance and Open Payroll connections:



Connector Alerts

When failures occur within the Connector, they are added to the audit log. After each processing sweep, any errors that occurred on the sweep are collated and passed back to TemplaCMS, where they will be formatted into an alert message for each of the responsible users. Depending on user settings, this could be delivered as an in system alert (as per screenshot), and/or an email.

Alert Details

General

Close

Previous

Next

Navigate

Save

Delete

Alert

From

Open payroll user

Sent

03 July 2026 14:43:25

To

Justin Horsfall Turner

Subject

TCMSConnector failures

The following failures have occurred on TCMSConnector, connected to Employment hero using Templa user OP:

Target: Third party
Area: Employees
Operation type: Insert
Key info: 97845

Error: "(Bobby-Jo Openson): Error validating employee details: Invalid date of birth,Start Date (01/01/0001) must be greater than Date of Birth (01/01/0001)"

Target: Third party
Area: Employees
Operation type: Insert
Key info: 70077

Error: "(Charley Openson): Error validating employee details: Invalid date of birth,Start Date (01/01/0001) must be greater than Date of Birth (01/01/0001)"

Target: Third party
Area: Employees
Operation type: Insert
Key info: 70004

AlertDetails

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EMPLOYEE PORTAL

Requests (holiday or absence)

When requesting holiday or absence via the Employee Portal it is now possible for the request to be for the current date.

Furthermore, if no **Absence Reasons** have been enabled for use on Employee Portal, the option to request absence will now be hidden.

OPEN FINANCE - SUPPLIERS AND CLIENTS

Inactive status

When using Open Finance, both Suppliers and Clients now allow the user to set an *inactive* status, which can be synchronised with the third party finance system (Sage Intacct).

Client Detail - ABC industries ltd

General

Close Previous Next Save Save Other Record

Notes Attachments Create mail Summary invoice line groups Consolidated invoice groups Transactions Reports

General PO Ref control Properties Contacts Credit control Invoice distribution Contract special instructions

Accounts system Open finance - Cleaning

Code ABC110 Type Managed

Name ABC industries ltd

Address

Town

County

Postcode

VAT 20%

Telephone

Fax

Email

Website

Settlement term (none)

0 From invoice date

Payee bank account

Default mailing contact (not set)

VAT registration number

Elapsed hour method Default

☒ Inactive?

☐ On stop?

Memo

ClientDetail © 2026 Workwave UK Limited

Supplier Detail - ABC supplier

General

Close Previous Next Save Save Other Record

Notes Attachments Create mail Transactions Reports

General Properties Contacts Dates

Accounts system Open finance - Cleaning

Code V-00055 Type Managed

Name ABC supplier

Address

Town CITY

County COUNTY

Postcode POSTCODE

Telephone

Fax

Email

Website

VAT Output 20

Terms From invoice date days 25

Default mailing contact (not set)

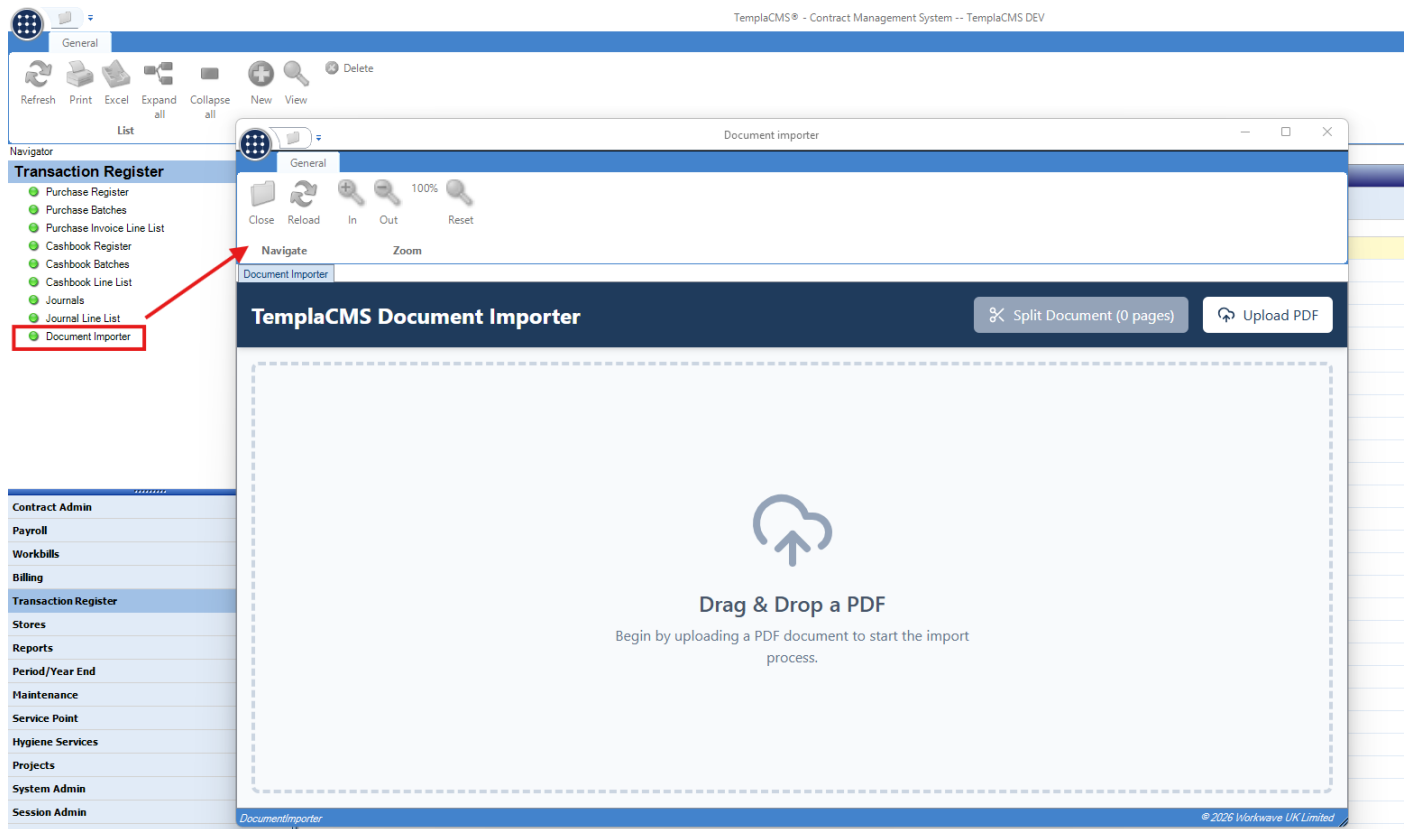
☒ Inactive?

☐ On stop?

SupplierDetail © 2026 Workwave UK Limited

PURCHASE INVOICE DOCUMENT IMPORTER

This new module of TemplaCMS allows the construction of entries to the Purchase Invoice Register directly from PDF invoices received from a supplier.



The highly flexible process allows the user to build up a library of templates covering each style of invoice they receive, thus making it possible to rapidly and consistently extract data from the PDF and get it into the TemplaCMS workflow approval process.

For more information please contact your account manager.

LOG NUMBERS

This enhancement update contains the following log numbers:

TEM-10956

TEM-10813

TEM-4704

TEM-10938



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.