

TemplaCMS Newsletter

Update v26.6

COMMERCIAL STATEMENT

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TABLE OF CONTENTS

INTRODUCTION 4
 Training..... 4

EMPLOYEE LEAVER REASON 5
 Background 5
 Employee Details..... 5

AVERAGE EARNINGS REPORT 6
 Background 6

PI DOWNLOAD VIA OPEN FINANCE..... 7
 Background 7
 System Control..... 7

CONTRACT CONFIGURATION REPORT..... 8

LOG NUMBERS..... 9

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.

EMPLOYEE LEAVER REASON

Background

When an employee is marked as a leaver, TemplaCMS (via the timesheet) allowed the user to select a pre-defined leaver reason. This reason was ultimately sent to the connected payroll system (SelectPay) as plain text and not retained against the employee in TemplaCMS.

With the move away from SelectPay, this process has now been changed to retain the leaver reason directly on the local TemplaCMS employee.

Employee Details

If any leaver reasons are defined, the employee will now allow a reason to be specified:

The screenshot shows the 'Employee Detail - Adriana Desato' form. The 'General' tab is active. The 'Personal details' section includes fields for Name (Adriana Desato), Address (Templa Line 2), Town (Tonbridge), County (Kent), Postcode (TN11 9JG), Sex (Unspecified), Date of birth (28/04/1995), and Passport (12). The 'Payroll' section includes Payrun (Open payroll - Cleaning-Two Weekly), Payroll number (70002), Pay frequency (Two Weekly), and Employee group. The 'Approval' section shows 'Site' as the approval level. The 'Left' section, highlighted with a red box, contains a 'Reason' field with the value 'Unknown'. The 'Emergency contact information' section includes fields for Contact name and Contact number. The 'Maximum hours' section shows 'Max hours per week' as 0.00. The 'P46 details' section includes radio buttons for Statement A, Statement B, and Statement C.

When an employee is made a leaver via a timesheet, the action of 'send leaver to payroll' will now update the above reason on the employee from the reason selected on the timesheet. Note that where an employee is left from multiple timesheets with different reasons, only the reason from the latest left assignment will be recorded on the employee.

AVERAGE EARNINGS REPORT

Background

In common with many grids in TemplaCMS, it is possible to group the average earnings report in order to get summary totals. It is now also possible to sort the report by the summarised totals.

Average Earnings Report					
report					
Average Earnings Report -- From: 01/01/2026 To: 31/12/2026 Criteria -- Only current assignments: No					
Site code					
Region	Actual total pay	Annual-equivalent pay	Average monthly pay	Average weekly pay	Pay frequency
CUSS/01	£2,984.25	£2,984.25	£248.69	£57.24	
FFMA/01	£2,984.25	£2,984.25	£248.69	£57.24	
FDPS/01	£2,984.25	£2,984.25	£248.69	£57.24	
ALPH/01	£2,783.00	£2,783.00	£231.92	£53.38	
APRS/01	£2,460.00	£2,460.00	£205.00	£47.18	
GEPH/01	£2,249.00	£2,249.00	£187.42	£43.13	
ELGR/01	£2,249.00	£2,249.00	£187.42	£43.13	
EILS/01	£2,249.00	£2,249.00	£187.42	£43.13	
FLMA/01	£1,989.50	£1,989.50	£165.79	£38.16	
BSPH/01	£1,794.00	£1,794.00	£149.50	£34.41	
DLER/01	£1,207.50	£1,207.50	£100.63	£23.16	
DWHH/01	£1,196.00	£1,196.00	£99.67	£22.94	
ASMA/01	£1,196.00	£1,196.00	£99.67	£22.94	
CRFB/01	£843.38	£843.38	£70.28	£16.18	
GIGS/01	£672.75	£672.75	£56.06	£12.90	
AEMA	£179.92	£179.92	£14.99	£3.45	
AJNS/01	£0.00	£0.00	£0.00	£0.00	
INN0123/01	£0.00	£0.00	£0.00	£0.00	
	£2,458,405.10	£2,459,179.59	£204,931.63	£47,164.94	

PI DOWNLOAD VIA OPEN FINANCE

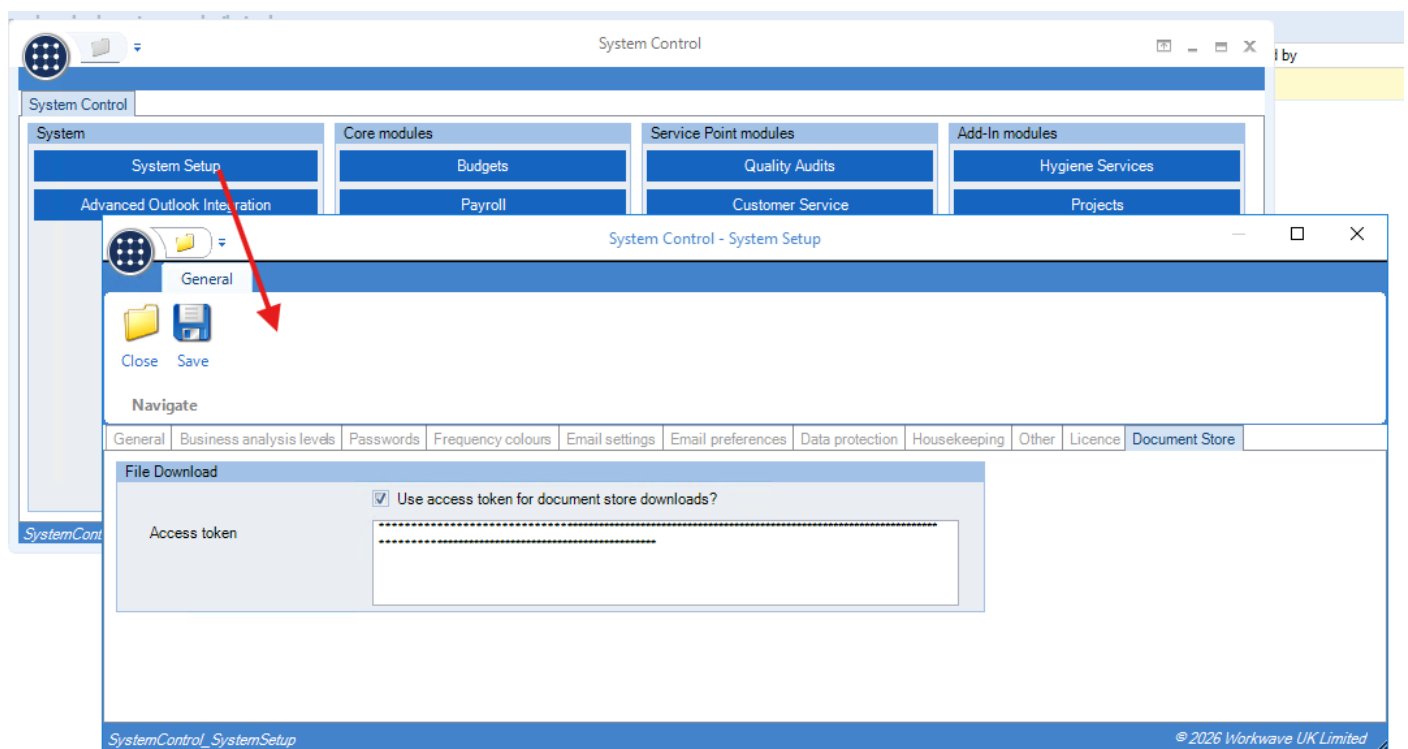
Background

When using Open Finance to connect to a third party finance application (for example Sage Intacct), the TemplaCMS Purchase Invoice can be sent with the associated PDF (held in the document store) when it is posted – thus making the PDF visible within the third party system.

Where TemplaCMS is hosted, the document store is not directly visible to the APIs responsible for this download, so this functionality was not possible. This has now been enhanced to use a shared access token when PDFs are required, thus enabling this functionality even when hosted.

System Control

The shared access token must be issued by WorkWave, and can be defined on **System Control >> System Setup >> Document store**.



CONTRACT CONFIGURATION REPORT

The **Billing** section of the Contract Configuration Report has been enhanced to include a new column for **Our ref.**

LOG NUMBERS

This enhancement update contains the following log numbers:

TEM-10970

TEM-5124

TEM-10900

TEM-10961



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.