

TemplaCMS Newsletter

Update v26.7

COMMERCIAL STATEMENT

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INTRODUCTION

This document details changes made to TemplaCMS and features added in update v26.7.

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.

OFFICE365 EMAILING

Background

Earlier in 2026, TemplaCMS was extended to support emailing via Office365.

This was a system level configuration with no ability to vary the details by user. As a result a company wishing to operate with different Office365 tenants for different parts of the business (e.g. split between Cleaning and Security) was unable to send emails discretely from each tenant.

It is now possible to vary the Office365 configuration at user level.

User Details

The user details window now allows override on the email tab to specify the necessary details allowing emails to be sent from a different O365 tenant.

The screenshot shows a web application window titled "User Details - Justin Horsfall Turner". The window has a blue header bar with a "General" tab selected. Below the header, there are navigation buttons: "Close", "Previous", "Next", and "Save". A "Navigate" button is also present. The main content area is divided into several tabs: "Analysis maintenance", "Inter-company datasources", "Dashboards", "Employee Groups", "Adhoc Jobs", "Out of office configuration", "Password", "Email" (selected), and "Dates". The "Email" tab is active, showing a section titled "SMTP override". This section contains a checkbox labeled "Override SMTP details?" which is checked. Below this, there are two input fields: "Email provider" with a dropdown menu showing "MicrosoftO365", and "Tenant Id" with a text box containing "[tenant id hidden]". Below these fields, there are three more input fields: "Client Id" with a text box containing "[client id hidden]", "Client Secret" with a text box containing "*****", and "MS O365 from address" with a text box containing "justin@thesecuritycompany.co.uk". The footer of the window displays "UserDetail" on the left and "© 2026 Workwave UK Limited" on the right.

MIGRATION WIZARD - CLIENTS

The Excel template generated, and the associated import process for clients has now been expanded to include a column for the client's default email address:

CloseExport errorsNavigate

Wizard

Select import type

Generate spreadsheet template

Select import spreadsheet

Validate data

Import

Start again

Done

C0	C1	C2	C3	C4	C5	C6	C7	C8	C9	C10	C11	C12	C13	C14	C15	C16
Code	Description	Addr	Tow	Coun	Postc	Vat co	Data	Telephone	Fax	Website	Settlement code	Account type	Payee bank acco	Vat registration n	On stop	Email address
0001	Client 0001	...	...			20		01655 444111			01	managed				accounts@client001.com
0002	Client 0002	...	...			20		01655 444111			01	managed				accounts@client003.com
0003	Client 0003	...	...			20		01655 444111			01	managed				accounts@client007.com
0004	Client 0004	...	...			20		01655 444111			01	managed				
0005	Client 0005	...	...			20		01655 444111			01	managed				
0006	Client 0006	...	...			20		01655 444111			01	managed				
0007	Client 0007	...	...			20		01655 444111			01	managed				

MigrationWizard

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MIGRATION WIZARD - EMPLOYEES

The Excel template generated, and the associated import process for employees has now been expanded to include a column for the employee's default passport number:

Close

Export errors

Navigate

General

Wizard

Select import type

Generate spreadsheet template

Select import spreadsheet

Validate data

Import

Start again

Done

	C0	C1	C2	C3	C4	C7	C8	C9	C10	C11	C12	C14	C15	C16	C17	C18	C19	C20	C21	C22
	Code	Dat	Payment frequen	Title	Forename 1	Surname	Start date	Left	Address	To	C	P	Dob	Ni number	Gender	E	F	Passport	Emergency conta	Emergenc
	0001		2w	Ms	Jane	Smith	01/01/2026	...	...				18/07/1998	...	female			4015512233		
	0002		2w	Ms	Mary	Smith	02/01/2026	...	...				19/07/1998	...	female			4015512234		
	0003		2w	Ms	Sheila	Smith	03/01/2026	...	...				20/07/1998	...	female			4015512235		
	0004		2w	Ms	Yani	Smith	04/01/2026	...	...				21/07/1998	...	female			4015512236		
	0005		2w	Ms	Estella	Smith	05/01/2026	...	...				22/07/1998	...	female			4015512237		

MigrationWizard

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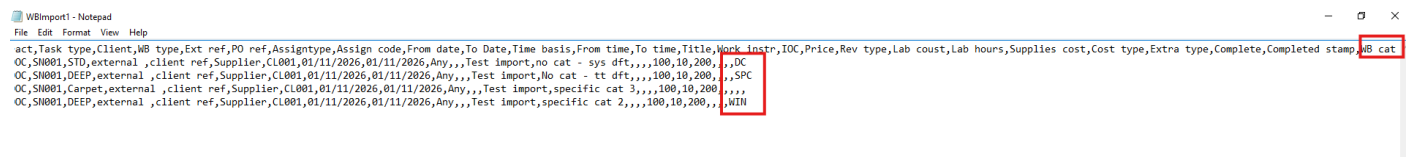
WORKBILL IMPORT

Background

The import of one-off workbills using a csv file (via Gateway using a ‘workbills’ External System) did not previously support the use of Workbill Categories. As such, if categories have been defined to TemplaCMS, any imported workbill required manual intervention to assign a valid category.

Workbill Import

The csv file now supports an optional 26th column in which the workbill category can be supplied:



The screenshot shows a Notepad window titled 'WBImport1 - Notepad'. The text inside is a CSV file with the following columns: act, Task type, Client, WB type, Ext ref, PO ref, Assign type, Assign code, From date, To Date, Time basis, From time, To time, Title, Work instr, IOC, Price, Rev type, Lab cost, Lab hours, Supplies cost, Cost type, Extra type, Complete, Completed stamp, and WB cat. The 'WB cat' column is highlighted with a red box. The data rows are as follows:

act	Task type	Client	WB type	Ext ref	PO ref	Assign type	Assign code	From date	To Date	Time basis	From time	To time	Title	Work instr	IOC	Price	Rev type	Lab cost	Lab hours	Supplies cost	Cost type	Extra type	Complete	Completed stamp	WB cat
OC	SH001	STD	external	,client ref,Supplier,CL001	01/11/2026	01/11/2026	Any,,,Test import,no cat - sys dft	,,,100	10	200	,,,DC														
OC	SH001	DEEP	external	,client ref,Supplier,CL001	01/11/2026	01/11/2026	Any,,,Test import,no cat - tt dft	,,,100	10	200	,,,SPC														
OC	SH001	Carpet	external	,client ref,Supplier,CL001	01/11/2026	01/11/2026	Any,,,Test import,specific cat 3	,,,100	10	200	,,,WIN														
OC	SH001	DEEP	external	,client ref,Supplier,CL001	01/11/2026	01/11/2026	Any,,,Test import,specific cat 2	,,,100	10	200	,,,WIN														

If the category is not supplied but categories are in use, the import will now pick up the defined system level default category. As such the imported workbills should no longer require manual intervention.

OPEN PAYROLL AND FINANCE - TEMPLA CONNECTOR

Journals

When interfacing to Sage Intacct, TemplaCMS journals into period 13 are now posted to Intacct as 'Adjustment' rather than 'Standard' journals.

Housekeeping

The housekeeping process checks that data between the systems is in line, inserting, updating and deleting as necessary. For example, if there are clients in Templa that are not in Sage Intacct then depending on the 'first sweep' either the missing records will be inserted to Intacct (where first is Third Party), or they will be deleted from Templa (where first is Templa).

This process has been made more tolerant to faults on retrieving data from either system, thus reducing the risk of deletes where they are not appropriate. Furthermore, it is now possible to control whether or not deletion is allowed during housekeeping – specifically for Clients, Suppliers and Employees:

The screenshot shows the 'Settings' window with the 'Areas' tab selected. The 'Employees' area is chosen from the dropdown. The following table represents the settings visible in the window:

Area	Value
Enable housekeeping	☒
Housekeeping allow delete from Templa	Soft
Housekeeping allow delete from third party	No
Housekeeping frequency mins	1440
Housekeeping last check	19/10/2026 11:27
Housekeeping next check	19/10/2026 18:00
Sync direction	Both
Templa audit level	Full
Templa frequency mins	60
Templa last check	19/10/2026 17:18
Templa next check	19/10/2026 18:18
Third party active frequency mins	60
Third party audit level	Use default
Third party inactive frequency mins	60
Default is company director	☐
Default national insurance calculation method	Standard annual earnings period method
Default national insurance category	A
Default P46 details	Statement C
Default pension assessment method	Automatic
Default primary location	Templa
Default primary pay category	Salary
Default rate	0
Default rate unit	Hourly

For Templa, it is possible to set this to Yes, No or Soft (where soft will simply de-activate the row rather than physically remove it), whilst for the Third Party system this can be Yes or No.

After applying the update a should set these options as appropriate.

Left Employees

When synchronising employees between TemplaCMS and the third party payroll, there was previously an option to exclude employees that had left more than a defined number of days ago. As time went on this setting had the effect of deleting employees as part of the housekeeping process the defined number of days after they had left the company.

This setting has now been replaced with a fixed date, to prevent this rolling delete from occurring.

The screenshot shows the 'Settings' window with the 'General' tab selected. The 'Area' dropdown is set to 'Employees'. The 'Exclude left employees prior to' field is highlighted with a red box and contains the date '01/05/2026'.

Setting	Value
Housekeeping allow delete from third party	No
Housekeeping frequency mins	1440
Housekeeping last check	19/10/2026 11:27
Housekeeping next check	19/10/2026 18:00
Sync direction	Both
Templa audit level	Full
Templa frequency mins	60
Templa last check	19/10/2026 17:18
Templa next check	19/10/2026 18:18
Third party active frequency mins	60
Third party audit level	Use default
Third party inactive frequency mins	60
Third party last check	19/10/2026 17:18
Third party next check	19/10/2026 18:18
Default is company director	☐
Default national insurance calculation method	Standard annual earnings period method
Default national insurance category	A
Default P45 details	Statement C
Default pension assessment method	Automatic
Default primary location	Templa
Default primary pay category	Salary
Default rate	0
Default rate unit	Hourly
Default tax calculation method	0
Default tax code	1234L
Employment hero cash cheque	Cash/cheque
Employment hero NIC: unknown	NIC: unknown
Exclude left employees prior to	01/05/2026

When applying the update, the new fixed date will be calculated using the existing number of days. It is recommended that a user checks and sets this to an appropriate date before starting Templa Connector.

Encryption

All password settings are now encrypted when held within the Templa Connector database.

After applying the update it is imperative that a user re-sets these details in order to apply the encryption.

TICKET NUMBERS

This enhancement update contains the following log numbers:

TEM-10982

TEM-10983

TEM-11023

TEM-11034

TEM-11040

TEM-11058



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.