WebTMA
Cumulative Release Notes
2026

March 2026

This document contains Release Notes for v7

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March 2026

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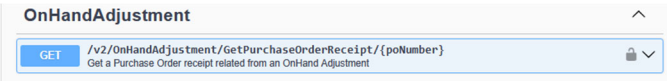
March 3, 2026

API – OHA Endpoint for PO Receipts



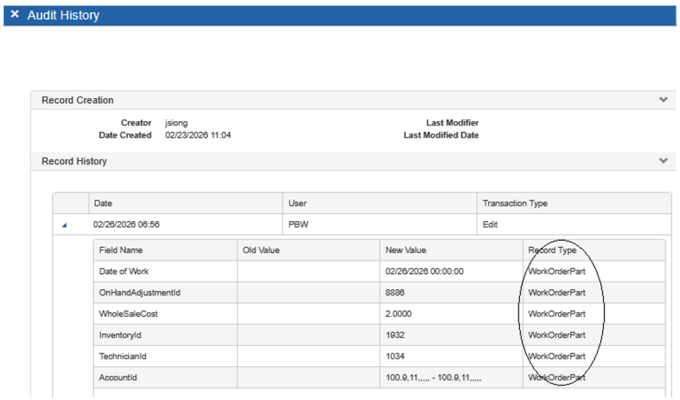
Summary: An On-Hand Adjustment for Purchase Order Receipts now has a GET API endpoint added to the API Platform.

Details:

You can use this endpoint to allow your external ERP software to call for Purchase Order received.

This feature is valuable to assure accuracy and save time.

WO Show Audit History Now Shows QP Part/Material Costs



Path: *Transactions > Work Order > Records / Action Menu-Show Audit History*

Summary: The *Show Audit History* on the Work Order Action Menu now includes Part cost entries that are made from *Quick Post* windows.

Details:

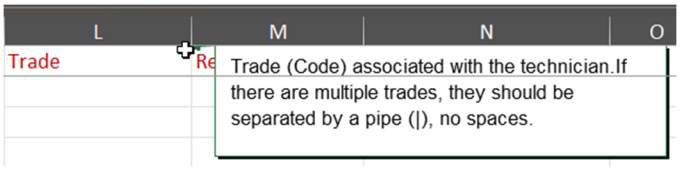
We have now expanded the *Work Order - Show Audit History* window to include information from *Quick Post Cost* and *Quick Post Material*. With this enhancement, you can now see Parts and Materials entered from Quick Post.

You no longer have to track down information from several sources. Now you can see it in one place.

With this enhancement, you can see cost entries on the *Audit History* window that originated from the *Work Order / Costs* Tab, specific *Quick Post* windows, and from the new *WebTMA* mobile application.

February 17, 2026

Technician Mass Import Now Supports Multiple Trades



Path: *Admin > Mass Import / Templates*

Summary: The new *Technician* Template for Mass Import now supports importing multiple Trades for Technicians.

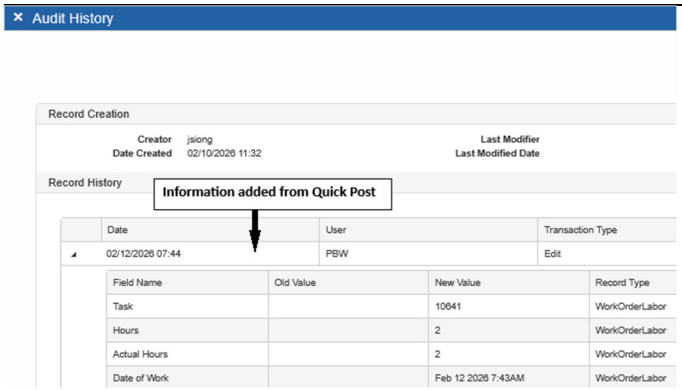
Details:

This new feature allows you to save time by importing new or updated information about your Technicians such as multiple Trades and multiple Repair Centers.

Using this feature, you can easily update charge rates, reclassify your Technicians, or add new employees with a single import.

When you have multiple Trades or Repair Centers, separate the entries using the vertical bar or pipe (|) with no spaces between entries.

WO Show Audit History Includes Cost Events from Quick Post



Path: *Transactions > Work Order > Records / Action Menu-Show Audit History*

Summary: The *Show Audit History* on the Work Order Action Menu now includes cost entries that are made from *Quick Post* windows.

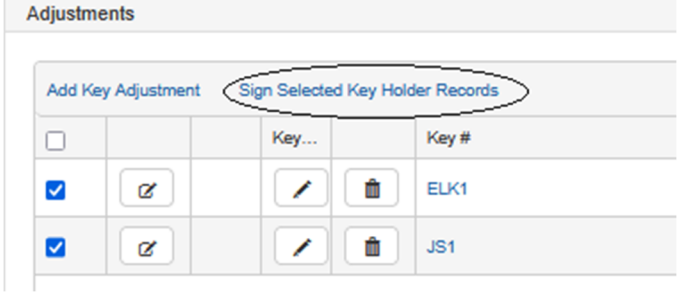
Details:

We expanded the *Work Order - Show Audit History* window to include information from *Quick Post* Cost, Time & Labor, and Other. You no longer have to track down information from several sources. Now you can see it in one place.

With this enhancement, you can see cost entries made from the *Work Order / Costs* Tab, the *Quick Post* windows listed above, and from the new *WebTMA* mobile application.

NOTE: Quick Post Materials will be a quick follow.

One Signature for Multiple Key Adjustments

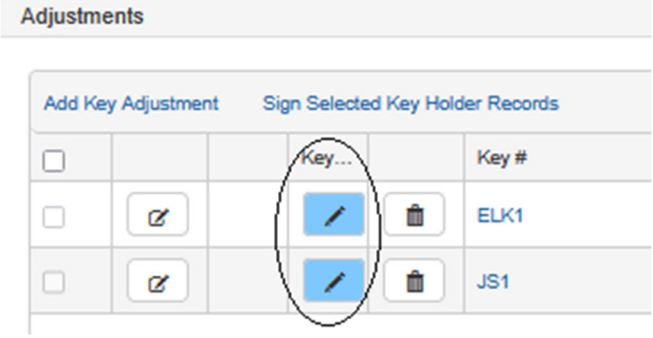


Summary: When you make adjustments to several keys for one person, you can select all key lines and the person only has to sign once.

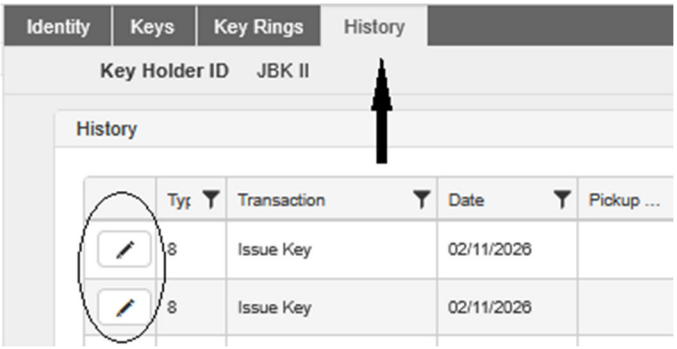
Details:

The convenience and time saved by this feature is substantial. For example, when Technicians pick up several keys at one time, they only have to sign once instead of individually for each key.

Once the signature is added, the signature icon for each selected line has a different background color



Path: *Material > Key Management > Key Adjustments–8 Issue Key*



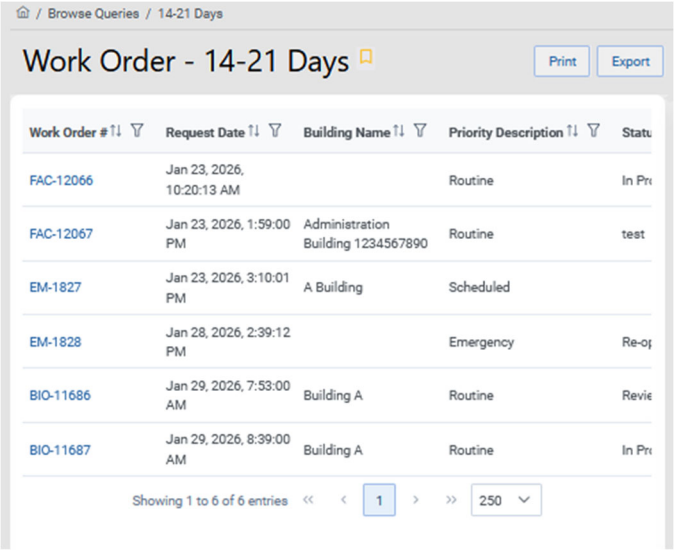
Path: *Material > Key Management > Key Holder / History Tab*

before the record is saved. You can click the icon to view the signature.

After the record is saved, the signature icon has a white background and can also be clicked to see the signature, but it cannot be changed.

NOTE: The signature carries over to the *Key Holder / History* Tab.

Browse Queries Window Now Has Print and Export



Path: *Reports > Browse Queries*

Summary: The central location for finding all your saved queries, the *Browse Queries* window, now has *Print* and *Export* capability.

Details:

Frequently, you need to send your query information to others. Being able to print or export all or part of a query gives you the convenience of looking through all system queries from a central location and printing or exporting whatever you need to anyone, anywhere.

Currently, the *Print* option is only available on the Work Order *Form* and returns the standard Work Order Report, but it will be available for others in time.

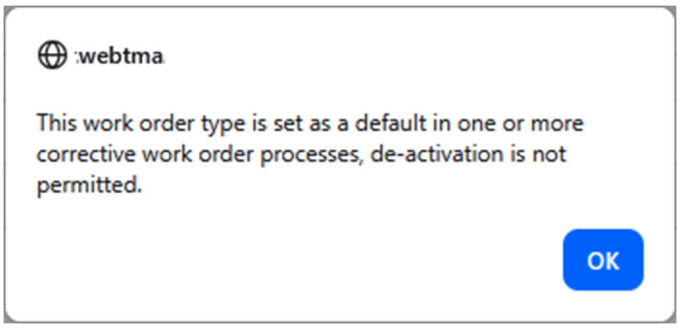
When you have selected a *Form* and *Query*, the resulting list includes *Print* and *Export* buttons at the top right of the page.

The *Export* button gives you the option to download a page or all pages to an Excel spreadsheet where you can review and manipulate the results.

On the Work Order Form, click the *Print* button to see check boxes for each row, and the *Print* button changes to *Submit*. Select the desired lines and click

Submit to download a .pdf file of a Work Order Report.

Deactivation Change for Certain Records



Summary: Default information used for **Corrective Work Orders** for *Master Checks* or *General Inspections* now prevents you from deactivating certain records until those records are amended. If you clear the *Active* check box on the records, you are alerted that the action is not permitted.

Details:

This change applies to the following records:

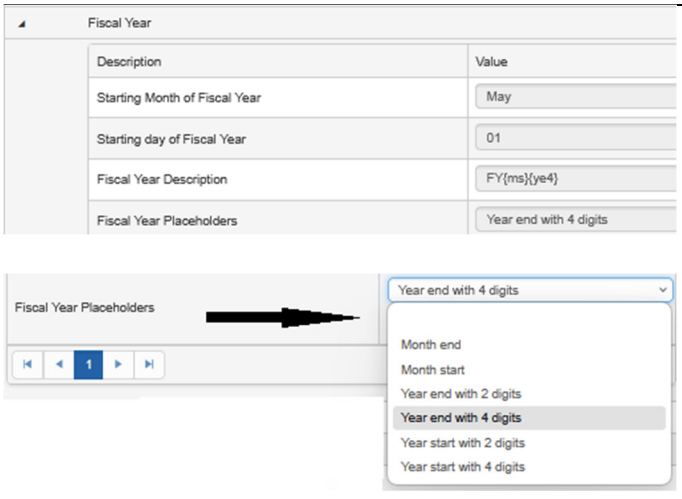
- Priorities (Lookups)
- Work Order Types (Lookups)
- Repair Center
- Task
- Trade

For records included in one of the Corrective Work Orders processes (Master Checks or General Inspections), an attempt to deactivate the record results in an alert, and you are unable to deactivate the record.

We want to assure that defaults for these processes do not interfere with completing work requests from the new WebTMA mobile application.

Note that, if the record is no longer a default for Master Checks or General Inspections, it can be deactivated.

Client Info Fiscal Year Preferences Options Added for Utilities



Summary: If you use the Utilities additional module, you can now add a *Fiscal Year Description* and include *Fiscal Year Placeholders* for the description of the Fiscal Year.

Details:

This functionality augments the *Starting Month* and *Starting day* of the Fiscal Year already in place. For now, this **only applies to the Utilities module**.

As illustrated in the following topic, the *Fiscal Year* field on the *Utility Ticket* window is autocompleted when you create a new record. It is based on these Fiscal Year settings.

The new fields give you more flexibility in the date format. Use the + plus button to add Placeholder selections similar to using keywords in Email settings.

Path: *Admin > Client Info / Preferences*

Enter text in the Fiscal Year Description field followed by your desired Placeholder selection. See examples below.

Here are the abbreviations you can add from the Placeholders to the Description.

- {ys4} - year start with 4 digits: 2026
- {ys2} - year start with 2 digits: 26
- {ye4} - year end with 4 digits: 2027
- {ye2} - year end with 2 digits: 27
- {ms} - month start with 2 digits: 02
- {me} - month end with 2 digits: 01

Examples of description text entries:

- FY{ye4} - FY2027
- FY-{ys2}-{ms} - FY-26-02

Utility Ticket Fiscal Year Auto-Completion Added

Path: *Organization > Utility > Utility Ticket / Identity Tab*

Summary: The *Fiscal Year* field added to the *Utility Ticket* window is now completed automatically.

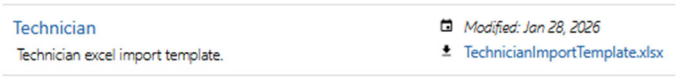
Details:

When you enter the *Billing End Date* on a new *Utility Ticket* record, the *Fiscal Year* field is auto-populated based on the settings made by your WebTMA system administrator in *Admin > Client Info / Preferences* as described in the previous topic.

Having a Fiscal Year identified is helpful in tracking your Utility records and when creating reports.

February 3, 2026

VOC – Mass Import Technician Template



Path: *Admin > Mass Import / Templates*

Summary: A new *Technician* Template has been added to Mass Import.

Details:

You now have the opportunity to save time by importing new or updated Technician information such as Charge Rate, Repair Centers, and many other fields.

Currently, only one Trade is imported; however, that will change soon.

This is the February Voice of the Customer enhancement. It was a feature request from the WebTMA Knowledgebase Community and had several up votes. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Mass Import for MWI Now Has GIS Fields

Columns added to the Templates listed at the right

Summary: Several Mass Import Templates now include GIS-related fields for maintenance-worthy items (MWI).

Details:

Importing this information allows you to use the information with TMA's internal GIS map and MapIt! function.

The GIS fields are:

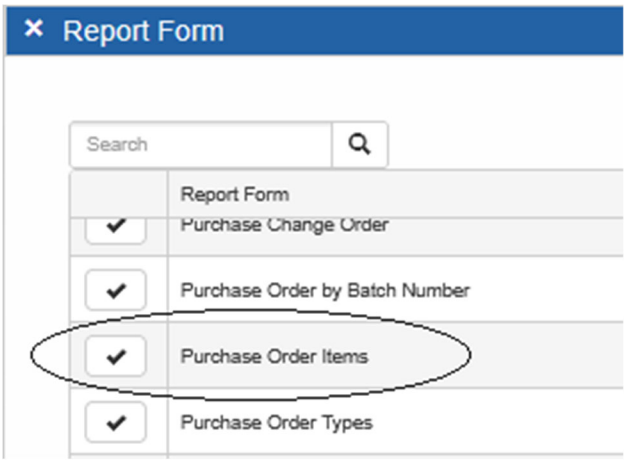
- GIS Id
- Latitude
- Longitude

The fields have been added to the following Templates:

- Area
- Asset
- Building
- Equipment
- Floor

In addition, the Area Template now includes *Area Function*.

Report Writer New Form – Purchase Order Items



Path: *Reports > Report Writer / Identity Tab*

Summary: A new *Report Form*, *Purchase Order Items*, has been added to the *Report Writer* window.

Details:

This Form was added to allow you to report on distributions for Purchase Order items so you can see what distributions are connected to the items.

If you have previously wanted to include these items in your Purchase Order reports, this Form gives you the resource to do that.

The new Form groups PO Item numbers in your report.

Service Vendor Field Added to Equipment Search

Path: *Organization > Equipment > Record–Find*

Summary: *Service Vendor* is now available for queries and column selections for Equipment search and browse actions.

Details:

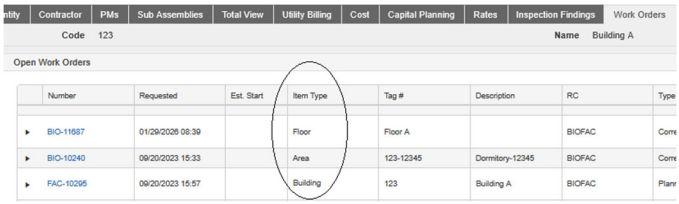
This is a free-form text field in the *Contact Information* Section of the *Equipment / Identity* Tab.

If you use it to identify the Service Vendor by name, phone, or other detail, you can easily search and query the field.

NOTE: Your WebTMA Administrator has the option to include the *Service Vendor* field.

Building Work Orders Tab Enhanced

Summary: We have enhanced the *Building / Work Order* Tab to include child locations. You now have a



Path: *Organization* > *Building* > *Building–Work Orders*

wholistic view of all work orders affiliated with the Building.

Details:

Work Orders for Areas and Floors that are associated with a Building are now visible on the *Building / Work Orders* Tab.

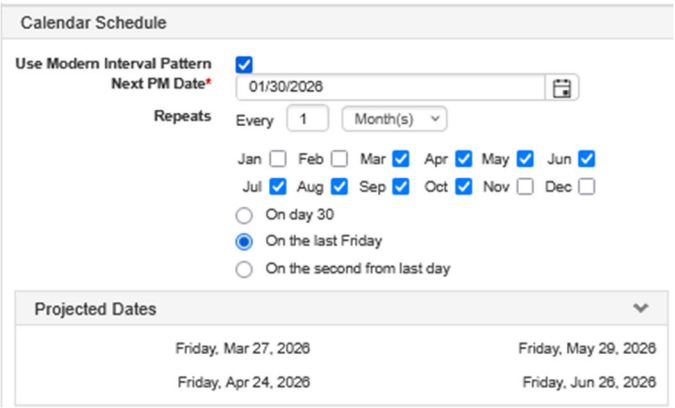
Work Orders written for Areas or Floors within the Building are displayed on both the *Areas / Work Orders* Tab and the *Building / Work Orders* Tab.

Work Orders for related Areas, Floors, and Buildings are reflected on the Facility record as well.

January 20, 2026

Release Notes for 2025, 2024, 2023, and 2022 is available in the Knowledge Base.

RRule Now Supports “By Month” Selection



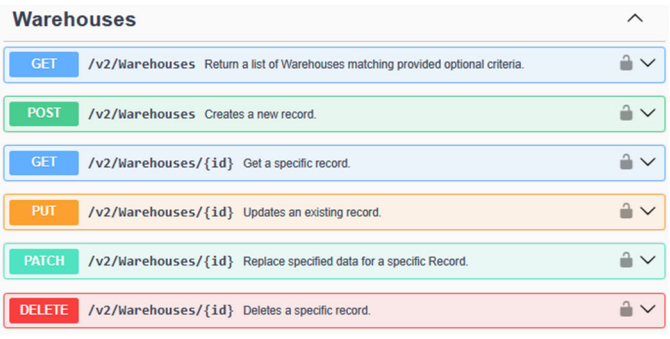
Summary: The RRule repeating pattern for recurring events such as PMs now gives you several configurations that allow you to specify specific months for your selected interval.

Details:

This allows you, for example, to select *Every 1 Month* but choose only the months that apply rather than all months. You can also specify certain days of the month.

You can use the same process for weekly, daily, and yearly.

Warehouse API Endpoints Added



Summary: Endpoints for Warehouses in WebTMA have been added to Swagger.

Details:

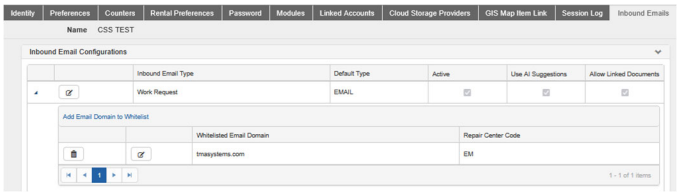
These are now available in the Swagger WebTMA Platform API.

These new APIs are fully described in our Swagger documentation.

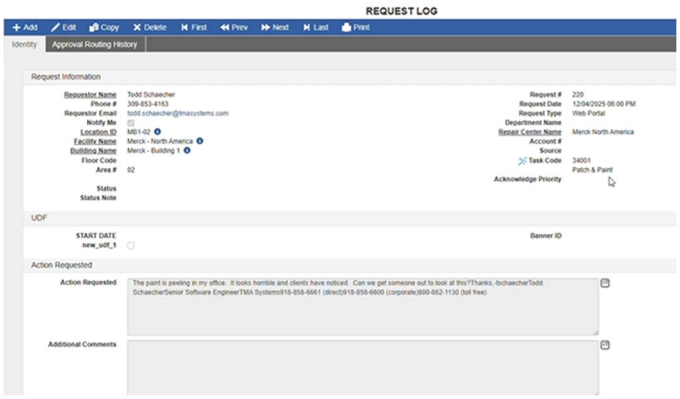
January 6, 2026

Release Notes for 2025, 2024, 2023, and 2022 can be found in the Knowledge Base.

VOC – AI Email Work Request



Path: *Client Info / Inbound Emails Tab*



Path: *Transactions > Request > Request Log*

Summary: If you have the Platform API module, you have the option to set up a standard "maintenance" email address for Requests. WebTMA can convert the message from this email address into a record in the *Request Log* window and optionally use AI to enhance the request record.

Details:

The process involves a certain amount of setup in *Client Info* using the new *Inbound Emails* Tab. This Tab is only visible if you have the additional Platform API module.

You can inform your Requestors of the new email address. If details about the Requestor are in *User Management > Requestors*, that information such as location and phone number are automatically inserted in a new AI generated *Request Log* record.

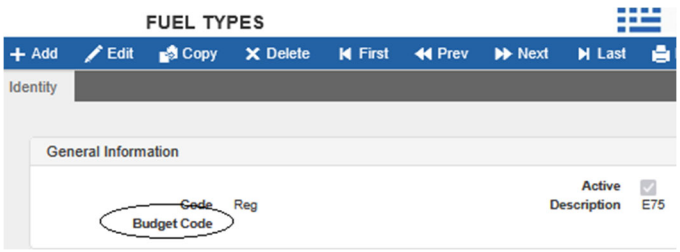
The requestor's message is included in the *Action Requested* field, and if you choose, AI suggests a *Task Code* based on the content of the message.

Fields that contain information suggested by AI are indicated by this icon .

NOTE: A separate document will be available for details on the full setup.

This is the January Voice of the Customer enhancement. It was presented in the Election for Direction during UC 2025. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

New Fuel Budget Code



Path: *Organization > Lookups > Fuel Types*

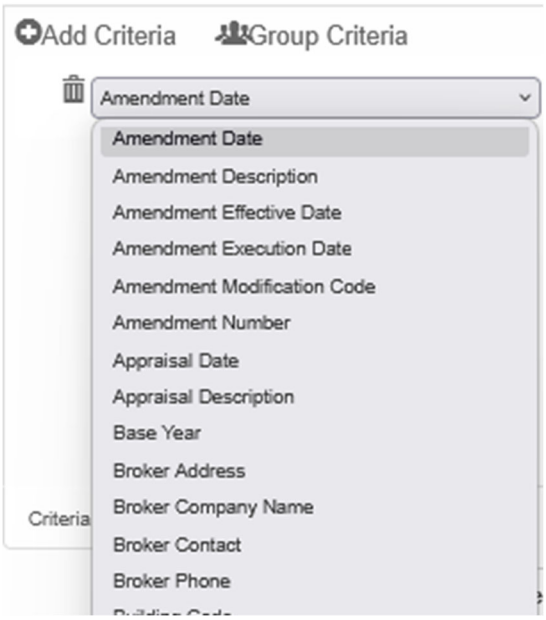
Summary: A new *Budget Code* field on the *Fuel Types* window applies to Credit Accounts for the *Fuel & Oil* window.

Details:

This applies to Credit Accounts and is set up in *Lookups > Fuel Types*.

The *Budget Code* field on the *Fuel & Oil* window applies to Debit Accounts.

Lease Management Search and Query Selections Added



Path: *Organization > Lease Management > Records*

Summary: New selections have been added to the drop-down list for Lease Management queries.

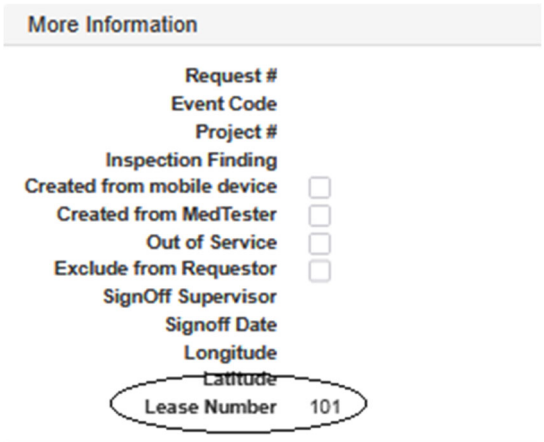
Details:

The searchable and reportable list now includes the following sections from the *Identity* Tab and their related columns:

- Brokers
- Amendments
- Appraisals
- Estimates
- Tax
- Responsibilities
- Punch List

In addition, Schedule information from the *Schedules* Tab is available.

Lease Number Field Added to Work Order



Path: *Transactions > Work Order > Records / Identity Tab–More Information Section*

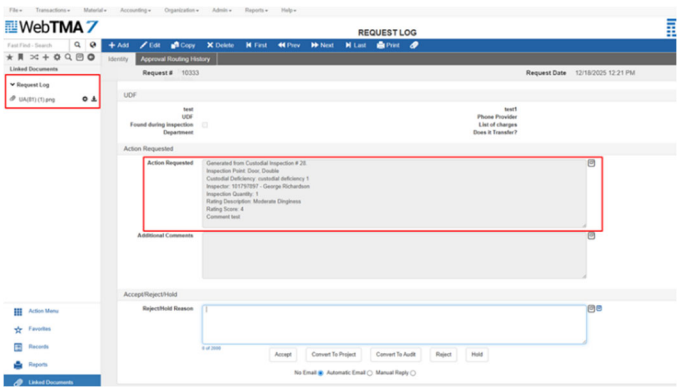
Summary: When you generate a Work Order from the *Punch List* section of Lease Management records, the *Work Order* window now includes a *Lease Number* field.

Details:

Since the additional Lease Management module includes a Punch List where you can generate a Work Order if needed, this helps you identify the source of the Work Order.

This is like Requests and Projects, that are also indicated as the source of a Work Order when applicable.

Custodial Point Request Details Added



Path: *Transactions > Request > Request Log*

Summary: When you create a Point request from the *Custodial Inspection* window, additional information is now included in the *Request* record.

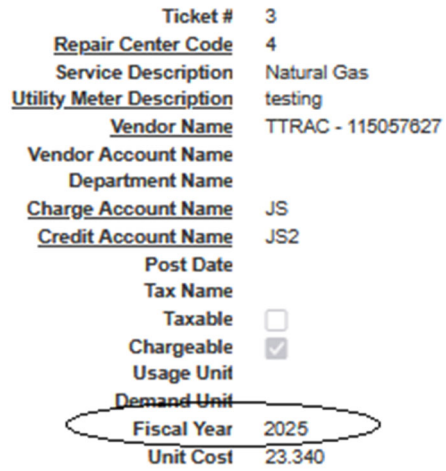
Details:

In the *Action Requested* field, you can now see the following information:

- Custodial Inspection #
- Inspection Code
- Inspector
- Custodial Deficiency
- Inspection Quantity
- Rating Description
- Rating Score
- Comments

In addition, any Linked Documents are added to the *Linked Documents* section of the Navigation panel.

Fiscal Year Added to Utility Ticket Window



Path: *Organization > Utility > Utility Ticket / Identity Tab*

Summary: The *Fiscal Year* field has been added to the *Utility Ticket* window.

Details:

You can enter the year of your choice.

NOTE: This field was available in a previous version of the application.

Progress on Database Views in Knowledge Base

Click to open https://knowledgebase.tmasystems.net/hc/en-

Summary: WebTMA has heard your requests for a complete list of database views. These are used for reporting by SaaS clients with Direct Database Connect or the Business Intelligence module. On-

us/articles/23648067588493-List-of-WebTMA7-Database-Views	premise clients are also urged to use these Views for reporting rather than query directly against transactional tables. **Details**: Although not fully completed, the Database Definitions section of the Knowledge Base currently has 415 views with more being added each week. The section includes a "List of WebTMA7 Database Views" article that is a table of the View names with a short definition. Many rows in the table are linked to the full View. Ultimately, the table will connect to Views for all rows. Click a link to open a full View in a new tab.