



TMASYSTEMS

**WebTMA
Cumulative Release Notes
2026**

March 2026

This document contains Release Notes for v7

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March 2026

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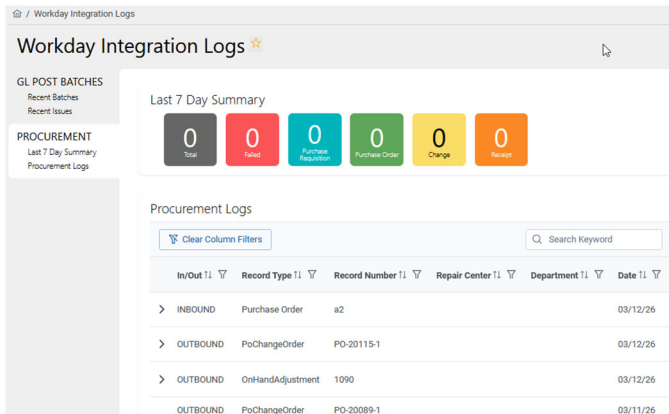
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March 24, 2026

Workday Procurement Integration



Path: *Admin > Workday > Integration Log*

Workday

Requisition Number Number Exported ☒

Message Message

Path: *Material > Purchase > Purchase Requisitions*

Summary: A new turnkey Workday integration for Procurement is now available. This is an additional module.

Details:

If you are a Workday client, you can use this new module to automatically integrate and sync your purchasing workflow between WebTMA and Workday. The two are fully integrated. No setup coding or IT involvement are needed. All you need are a few portal keys from Workday.

The module does the following for WebTMA 7 records that have a Workday reference:

Validate Vendor. Connects WebTMA 7 to Workday to authenticate Vendors in WebTMA and ensure vendor data consistency between both systems. Polled daily.

Validate Part. Connects WebTMA 7 to Workday to validate Part records and maintain alignment of inventory across platforms. Polled every 10 minutes.

Export Purchase Requisitions. Export Purchase Requisitions from WebTMA 7 to Workday and streamline requisition processing in Workday. Polled every 10 minutes.

Import Purchase Order. Import Purchase Orders created in Workday into WebTMA 7 and ensure visibility of Workday-generated POs in WebTMA. Polled every 10 minutes.

Export PO Change Order. Modify the Workday Purchase Order after it has been sent to Workday by exporting a *PO Change Order* from WebTMA to support change order processing and synchronization between systems. Polled every 10 minutes.

Export On-Hand Adjustment. For received items, automatically send adjustment lines from WebTMA 7 to the related Workday Purchase Order to align inventory and financial data following adjustments. Polled every 10 minutes.

Export Invoice Information. Send Accounts Payable Invoice information from WebTMA 7 to Workday and facilitate financial processing and tracking in Workday. Polled every 10 minutes.

See a Consolidated View. The *Integration Log* in WebTMA 7 shows a list of every inbound or outbound action that has taken place between

WebTMA 7 and Workday for traceability and troubleshooting of integration activities..

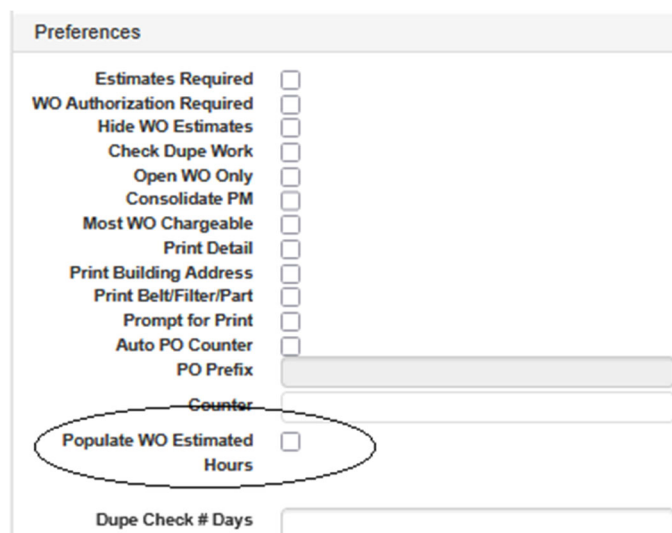
The following windows include a Workday section like the example at left:

- Purchase Requisition
- Purchase Order
- Vendor
- Accounts

Enabling this interface creates a seamless integration between **Workday** and **WebTMA 7**, which eliminates manual data entry and reduces the risk of discrepancies between systems. This ensures that procurement and maintenance operations stay aligned in real time.

Please contact your account manager for details on acquiring this new module.

New Repair Center Preference – Populate WO Estimated Hours



The screenshot shows a 'Preferences' window with a list of settings. The 'Populate WO Estimated Hours' checkbox is circled in red. Other settings include 'Estimates Required', 'WO Authorization Required', 'Hide WO Estimates', 'Check Dupe Work', 'Open WO Only', 'Consolidate PM', 'Most WO Chargeable', 'Print Detail', 'Print Building Address', 'Print Belt/Filter/Part', 'Prompt for Print', 'Auto PO Counter', 'PO Prefix', 'Counter', and 'Dupe Check # Days'.

Path: *Organization > Repair Center > Records / Identity Tab*

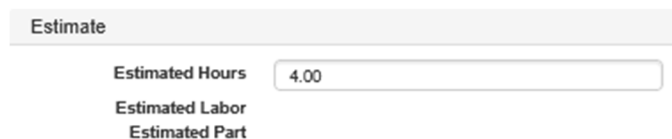
Summary: A new *Populate WO Estimated Hours* check box has been added to the *Preferences* section of the *Repair Center* window.

Details:

When the box is checked, it enables automatic completion of the *Estimated Hours* field on the *Work Order* window.

See the next topics for a discussion of this feature.

Auto-Complete Estimated Hours for Non-PM Work Orders



The screenshot shows an 'Estimate' window with fields for 'Estimated Hours', 'Estimated Labor', and 'Estimated Part'. The 'Estimated Hours' field is populated with the value '4.00'.

Path: *Transactions > Work Order > Records / Identity Tab*

Summary: If your Repair Center has the *Populate WO Estimated Hours* Preference checked (see the

previous topic), the *Estimated Hours* field on the *Work Order* window can be completed automatically.

Details:

WebTMA uses values from the *Task* window *Labor Standard* field.

If the WO has multiple Tasks, WebTMA calculates the sum of *Labor Standard* values from all Tasks.

With this new feature, you know at-a-glance the hours needed to complete the work.

When the conditions are met, the feature also applies to Work Orders created using Auto Attendant or Inspection Findings.

If you manually enter a value in the *Estimated Hours* field, the feature does **not** override your entry.

Auto-Complete Estimated Hours for PM Work Orders

Estimate	
Estimated Hours	4.00
Estimated Labor	
Estimated Part	

Path: *Transactions > Work Order > Records / Identity Tab*

Summary: If the PM Repair Center has the *Populate WO Estimated Hours* Preference checked, the *Estimated Hours* field on the *Work Order* window can be completed automatically.

Details:

WebTMA looks to the *Est. Time* field on the *PM Schedule Entry* flyout for a value.

If no value is entered on the flyout, the *Labor Standard* from the *Task* window is used.

With this new feature, you know at-a-glance the hours needed to complete the work.

If neither of these windows contains a value, the WO *Estimated Hours* field remains blank.

If you manually enter a value in the *Estimated Hours* field, the feature does **not** override your entry.

WO Audit History Shows Time & Attendance Labor Cost

Summary: The *Show Audit History* on the Work Order Action Menu now includes entries that are made from the *Time Manager > Time & Attendance* window.

Details:

We have expanded the *Work Order - Show Audit History* window to include information from *Time Manager > Time & Attendance*. With this

✕
Audit History

Record Creation

Creator

jsiong

Date Created

03/02/2026 10:51

Last Modifier

PBW

Last Modified Date

03/20/2026 06:39

Record History

Date

03/20/2026 06:40

User

PBW

Transaction Type

Edit

Field Name	Old Value	New Value	Record Type
Task		10583	WorkOrderLabor
Hours		1	WorkOrderLabor
Actual Hours		1	WorkOrderLabor
Date of Work		Mar 20 2026 8:40AM	WorkOrderLabor
Min. P'temps		False	WorkOrderLabor

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

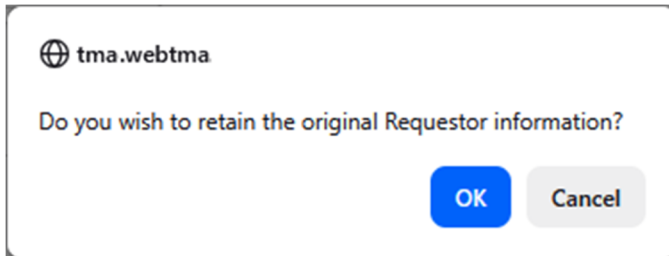
enhancement, you can now see labor entered from this window.

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 labor cost entries on the *Audit History* window that originated from the *Work Order / Costs* Tab and the *Time & Attendance* window.

March 17, 2026

VOC – Requestor Information Retained on WO Copy



Path: *Transactions > Work Order > Records*

Summary: When you copy a Work Order, you now have the option to retain the Requestor fields (name, phone, email) information.

Details:

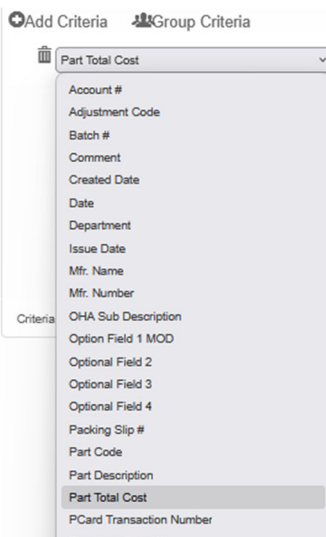
Previously, when you clicked *Copy* on the WebTMA toolbar, the contents of the *Requestor* fields were not carried over to the copied record.

With this release, a prompt asks if you wish to retain the original Requestor information. Click *OK* to keep the information, *Cancel* to remove it.

Some clients prefer to keep the original Requestor, but others do not. This is another way WebTMA continues to give all our clients options to maintain their individual workflow process.

This is a March Voice of the Customer enhancement. It is a feature requested by Dallas College in the WebTMA Community. We saw an opportunity to redevelop the page to be more user-friendly. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

VOC – New OHA Query Column ‘Part Total Cost’



Path: *Material > On-hand Adjustments-Find*

Summary: A new column selection, *Part Total Cost*, has been added to the *Find* flyout for the *On-Hand Adjustments* window.

Details:

The new column is calculated as:

$$\text{Unit Cost} \times \text{Quantity} = \text{Part Total Cost}$$

While the information has been available in a standard report, this new column gives you immediate information about the total cost impact of any adjustments, and it can be used to display statistics on the Dashboard.

This is a March Voice of the Customer enhancement. We would like to thank ZF Lifetec for submitting this suggestion. We saw an opportunity to redevelop the page to be more user-friendly. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

VOC – StarRez Integration Notification Configuration

StarRez Integration	
Description	Value
StarRez Project Type	
StarRez Request Type	Walk-In
Send Email Notifications	Denied

Path: *Admin > Client Info / Preferences*

Summary: If you use the StarRez interface to submit requests to WebTMA, you can elect to notify the requestor when StarRez requests are updated.

Details:

If you Grant *Send Email Notifications* in *Client Info / Preferences*, WebTMA sends notifications to your customers that submitted the request.

We know not all clients want this as the default, so we made it a *Client Info / Preference*. **By default, the setting is Denied which was the previous behavior in WebTMA 7.** If you want to use it, be sure it is Granted.

Customers that submitted a request from the StarRez Portal will receive the same notifications that have been configured in your WebTMA application.

NOTE: If you use our API Platform, you can set the Notify Me feature there instead. In the API call, you can update how you call the StarRez Integration API and include the NotifyMe parameter in the payload.

This is a March Voice of the Customer enhancement. We would like to thank George Fox University, the University of San Diego, the University of Louisiana at Lafayette, and others for submitting this suggestion. WebTMA has evolved into the solution it is largely through great feedback and suggestions provided by our clients.

Mass Import – Equipment and Vehicles Have New Fields and URL

AQ	AR
URL	Document link URL (support www.google.com and https://www.google.co m) as well as pipe

Path: *Mass Import / Templates*

Summary: The Mass Import Templates for Equipment and Vehicles now include an option for Linked Document URLs and several more fields.

Details:

The template allows you to enter URLs in the template and supports www.google.com, [https://www](https://www.google.com)

[w.google.com](https://www.google.com), and the pipe (|) to separate multiple URL entries.

Having these new fields and the Linked Document URL allows for more accuracy and saves you time and keystrokes.

Here is a list of the new fields:

EQUIPMENT	VEHICLES
Attached to Vehicle	Body Type
Device #	Delivery Date
Life Expectancy	Engine Liters
Original Cost	Engine Type
Owner's Department	Fleet Number
Purchase Date	Fuel Type
Purchase Order #	Fund Type
Registered Date	Model Year
System SubType	Purchase Cost
	Tire Size/Brand

March 3, 2026

API – OHA Endpoint for PO Receipts

OnHandAdjustment ^

GET /v2/OnHandAdjustment/GetPurchaseOrderReceipt/{poNumber}
Get a Purchase Order receipt related from an OnHand Adjustment

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

✕ Audit History

Record Creation			
Creator	jisong	Last Modifier	
Date Created	02/23/2026 11:04	Last Modified Date	
Record History			
Date	User	Transaction Type	
02/26/2026 08:56	PBW	Edit	
Field Name	Old Value	New Value	Record Type
Date of Work		02/26/2026 00:00:00	WorkOrderPart
OnHandAdjustmentId		8886	WorkOrderPart
WholeSaleCost		2.0000	WorkOrderPart
InventoryId		1932	WorkOrderPart
TechnicianId		1034	WorkOrderPart
AccountId		100.9,11,... - 100.9,11,...	WorkOrderPart

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

L	M	N	O
Trade			

Trade (Code) associated with the technician. If there are multiple trades, they should be separated by a pipe (|), no spaces.

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

✕ Audit History

Record Creation			
Creator	jsiong	Last Modifier	
Date Created	02/10/2026 11:32	Last Modified Date	
Record History			
Information added from Quick Post			
Date	02/12/2026 07:44	User	PBW
Transaction Type		Edit	
Field Name	Old Value	New Value	Record Type
Task		10641	WorkOrderLabor
Hours		2	WorkOrderLabor
Actual Hours		2	WorkOrderLabor
Date of Work		Feb 12 2026 7:43AM	WorkOrderLabor

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

Adjustments

Add Key Adjustment Sign Selected Key Holder Records

		Key...	Key #
☐			
☒			ELK1
☒			JS1

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

Adjustments

Add Key Adjustment Sign Selected Key Holder Records

☐		Key...		Key #
☐				ELK1
☐				JS1

Path: Material > Key Management > Key Adjustments-8 Issue Key

Identity Keys Key Rings History

Key Holder ID JBK II

History

	Tyf	Transaction	Date	Pickup ...
	8	Issue Key	02/11/2026	
	8	Issue Key	02/11/2026	

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

/ Browse Queries / 14-21 Days

Work Order - 14-21 Days

Work Order #	Request Date	Building Name	Priority Description	Status
FAC-12066	Jan 23, 2026, 10:20:13 AM		Routine	In Pri
FAC-12067	Jan 23, 2026, 1:59:00 PM	Administration Building 1234567890	Routine	test
EM-1827	Jan 23, 2026, 3:10:01 PM	A Building	Scheduled	
EM-1828	Jan 28, 2026, 2:39:12 PM		Emergency	Re-ov
BIO-11686	Jan 29, 2026, 7:53:00 AM	Building A	Routine	Revie
BIO-11687	Jan 29, 2026, 8:39:00 AM	Building A	Routine	In Pri

Showing 1 to 6 of 6 entries << < 1 > >> 250

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.

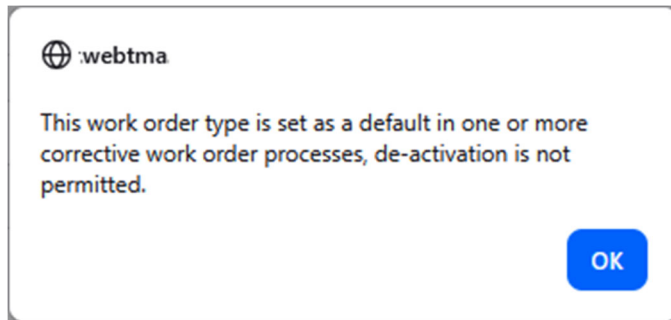
When you have selected a *Form* and *Query*, the resulting list includes *Print* and *Export* buttons at the top right of the page.

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

The image shows two parts of the software interface. The top part is a "Fiscal Year" configuration window with a table:

Description	Value
Starting Month of Fiscal Year	May
Starting day of Fiscal Year	01
Fiscal Year Description	FY{ms}{ye4}
Fiscal Year Placeholders	Year end with 4 digits

The bottom part shows the "Fiscal Year Placeholders" dropdown menu. It has a list of options: "Year end with 4 digits" (selected), "Month end", "Month start", "Year end with 2 digits", "Year end with 4 digits", "Year start with 2 digits", and "Year start with 4 digits". There are navigation arrows on the left of the dropdown.

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.

Fiscal Year Description	FY{ms}{ye4}
Fiscal Year Placeholders	Year end with 4 digits +

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

Taxable	☐
Chargeable	☐
Usage Unit	
Demand Unit	
Fiscal Year	FY052026
Unit Cost	

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.

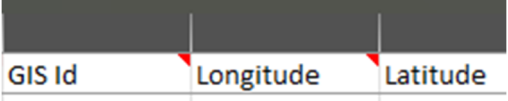
February 3, 2026

VOC – Mass Import Technician Template

Technician Technician excel import template. Modified: Jan 28, 2026 TechnicianImportTemplate.xlsx	Summary: A new <i>Technician</i> 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 <u>Voice of the Customer</u> 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.
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Path: *Admin > Mass Import / Templates*

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 <i>Area Function</i>.
---	--

Report Writer New Form – Purchase Order Items

	Report Form
☒	Purchase Change Order
☒	Purchase Order by Batch Number
☒	Purchase Order Items
☒	Purchase Order Types

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

Criteria: Sewer, Gas

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

Entity	Contractor	PMs	Sub Assemblies	Total View	Utility Billing	Cost	Capital Planning	Rates	Inspection Findings	Work Orders
Code 123										Name Building A
Open Work Orders										
	Number	Requested	Est. Start	Item Type	Tag #	Description	RC	Type		
▶	BIO-11587	01/29/2025 08:39		Floor	Floor A		BIOFAC	Comm		
▶	BIO-10240	06/20/2023 15:33		Area	123-12345	Dormitory-12345	BIOFAC	Comm		
▶	FAC-10295	09/20/2023 15:57		Building	123	Building A	BIOFAC	Plant		

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

Calendar Schedule

Use Modern Interval Pattern☒

Next PM Date*
01/30/2026

Repeats
Every 1 Month(s)

Jan☐ Feb☐ Mar☒ Apr☒ May☒ Jun☒
Jul☒ Aug☒ Sep☒ Oct☒ Nov☐ Dec☐
☐ On day 30
☒ On the last Friday
☐ On the second from last day

Projected Dates
Friday, Mar 27, 2026 Friday, May 29, 2026
Friday, Apr 24, 2026 Friday, Jun 26, 2026

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

Warehouses		
GET	/v2/Warehouses	Return a list of Warehouses matching provided optional criteria.
POST	/v2/Warehouses	Creates a new record.
GET	/v2/Warehouses/{id}	Get a specific record.
PUT	/v2/Warehouses/{id}	Updates an existing record.
PATCH	/v2/Warehouses/{id}	Replace specified data for a specific Record.
DELETE	/v2/Warehouses/{id}	Deletes a specific record.

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

[Identify](#)
[Preferences](#)
[Countries](#)
[Rental Preferences](#)
[Password](#)
[Modules](#)
[Linked Accounts](#)
[Cloud Storage Providers](#)
[GIS Map Item Link](#)
[Session Log](#)
[Inbound Email](#)

Name CSS TEST

Inbound Email Configurations

	Inbound Email Type	Default Type	Active	Use AI Suggestions	Allow Linked Documents
	Work Request	EMAIL	☒	☐	☐

Add Email Domain to Whitelist

	Whitelisted Email Domain	Repair Center Code
	imssystems.com	EM

1 - 1 of 1 Items

Path: *Client Info / Inbound Emails Tab*

Add
Edit
Copy
Delete
First
Prev
Next
Last
Print

Request Log

Identity
Approval Routing History

Request Information

Requestor Name	Todd Schaecher	Request #	220
Phone #	309-455-4163	Request Date	12/04/2025 06:00 PM
Requester Email	Todd.schaecher@emerysystems.com	Request Type	Web Portal
Notify Me	☐	Department Name	
Location ID	M01-42	Request Center Name	Merco North America
Facility Name	Merco - North America	Account #	
Building Name	Merco - Building 1	Source	
Floor Code		Task Code	34001 Patch & Paint
Area #	02	Acknowledge Priority	
Status			
Status Note			

UDF

START DATE
new_wt1_1

Benner ID

Action Requested

Action Requested

The plant is peaking in my office. It looks horrible and clients have noticed. Can we get someone out to look at this? Thanks, tschaecher Todd
SchaecherSenior Software EngineerTMA Systems19-455-6661 | direct19-455-6660 | corporate309-850-1130 (cell free)

Additional Comments

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

FUEL TYPES

+ Add Edit Copy Delete First Prev Next Last

Identity

General Information

Code	Reg	Active Description	E75
Budget Code			

Path: *Organization > Lookups > Fuel Types*

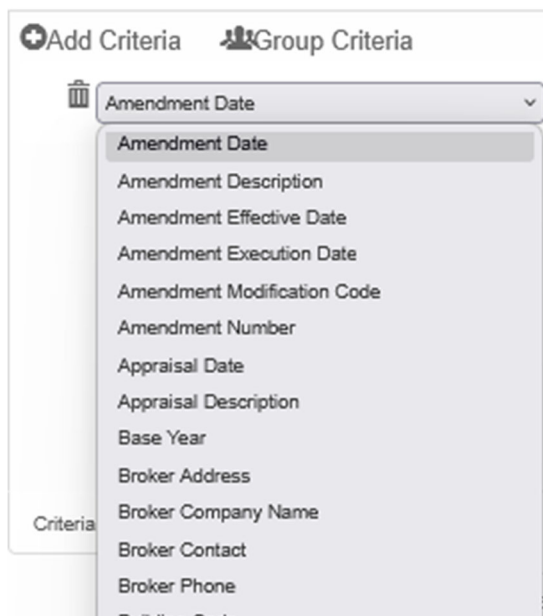
Summary: A new *Budget Code* field on the *Fuel Types* window applies to Credit Accounts for the *Fuel & Oil* window.

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.

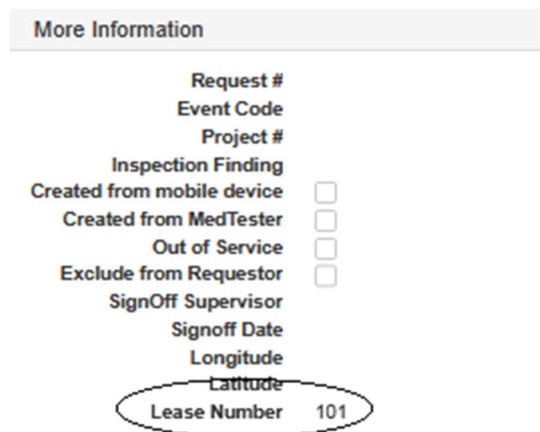
Details:

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.

