



TMASYSTEMS

**WebTMA
Cumulative Release Notes
2026**

May 2026

This document contains Release Notes for v7

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May 2026

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Contents

May 12, 2026.....	1
VOC – Linked Documents Enhancements.....	1
Dashboard Queries Enhancement.....	1
Acknowledgement Enhancements.....	2
OTTO Now Searches the Knowledge Base.....	3
Custodial Template Query Additional Fields.....	3
Transfer Parts Budget Code Criteria Added.....	4
April 28, 2026.....	5
VOC – Total View Enhancement.....	5
VOC – Lease Records Show Tenant & Landlord Simultaneously.....	5
OTTO – AI Work Order Assistant.....	6
OTTO and Browse Queries.....	6
Technician Role Now Has ‘Add’ for Request Log Window Access.....	7
New Client Info Preference for Inspections Pass All.....	7
Cost Unit of Measure for WO and QP.....	8
Request Conversion to Project Includes Linked Documents.....	9
April 14, 2026.....	10
VOC – eSignature Added to User Record.....	10
VOC – SRP Building & Area Fields Include Second Line.....	10
Service Request Form Forwarding to Service Request Portal.....	11
March 24, 2026.....	12
Workday Procurement Integration.....	12
New Repair Center Preference – Populate WO Estimated Hours.....	13
Auto-Complete Estimated Hours for Non-PM Work Orders.....	13
Auto-Complete Estimated Hours for PM Work Orders.....	14
WO Audit History Shows Time & Attendance Labor Cost.....	14
March 17, 2026.....	16
VOC – Requestor Information Retained on WO Copy.....	16
VOC – New OHA Query Column ‘Part Total Cost’.....	16
VOC – StarRez Integration Notification Configuration.....	17
Mass Import – Equipment and Vehicles Have New Fields and URL.....	17
March 3, 2026.....	19


API – OHA Endpoint for PO Receipts	19
WO Show Audit History Now Shows QP Part/Material Costs.....	19
February 17, 2026.....	20
Technician Mass Import Now Supports Multiple Trades.....	20
WO Show Audit History Includes Cost Events from Quick Post	20
One Signature for Multiple Key Adjustments	20
Browse Queries Window Now Has Print and Export	21
Deactivation Change for Certain Records.....	22
Client Info Fiscal Year Preferences Options Added for Utilities	22
Utility Ticket Fiscal Year Auto-Completion Added.....	23
February 3, 2026	24
VOC – Mass Import Technician Template.....	24
Mass Import for MWI Now Has GIS Fields.....	24
Report Writer New Form – Purchase Order Items.....	25
Service Vendor Field Added to Equipment Search	25
Building Work Orders Tab Enhanced	25
January 20, 2026	27
RRule Now Supports “By Month” Selection.....	27
Warehouse API Endpoints Added.....	27
January 6, 2026.....	28
VOC – AI Email Work Request	28
New Fuel Budget Code	28
Lease Management Search and Query Selections Added.....	29
Lease Number Field Added to Work Order	29
Custodial Point Request Details Added	30
Fiscal Year Added to Utility Ticket Window	30
Progress on Database Views in Knowledge Base.....	30

May 12, 2026


VOC – Linked Documents Enhancements

	Name	Description	Type	Category
	OTTO_SearchedKB_Link.png	OTTO	Image	
	Release Notes	Release Notes	URL	URL Link
	Webinar_Notes.docx	Notes	Document	MS Word
	BusinessIntelligence.pdf	Business Intelligence	PDF	
	RelNotes_DialWithDistinct.png	Dial Gauge	Image	Image

Path: *Linked Document List flyout*

Summary: The Paper Clip icon  on the toolbar of any record that has Linked Documents has been improved to make it more meaningful and easier to use. Labels have been revised for clarity.

Details:

When you click the Paper Clip icon , it opens a read-only flyout grid that shows the document details, a thumbnail, and the document type.

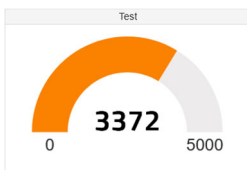
Click the thumbnail in the first column to do the following:

- File icon – Download the file
- Image icon – Open a full size image in a new browser tab
- Link icon – Opens the link in a new browser tab

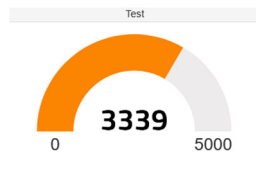
Two column labels have been reversed for better understanding. The Category is now *Type* and Document Type is now *Category*. In the Category, your selections include options from *Lookups > Document Types*.

This is a May Voice of the Customer enhancement. It is a feature requested by clients converting from WebTMA 5 to WebTMA 7 as well as others in the 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.

Dashboard Queries Enhancement



No Distinct Setting



With Distinct Setting

Summary: If you use Executive Dashboard graphic displays, you now have the option to *Show only distinct values from the query's result* for records which previously appeared to give "duplicated" results.

Details:

When you mark the *Show only distinct values from the query's result* check box, only one count is included.

Previously, if you had a Dashboard Control with Work Orders and a column for multi-tasks or schedules, a value for each instance was returned. For example, a

Control Type

Bar Chart Pie Chart Digital Dial Gauge

Configuration

Name* Work Order

Comments

Query Method Window Query Custom Query

Base Window Work Order

Base Query 14-21 Days

Start Value

End Value

Icon

Threshold Value

Extra Criteria

Quick Post Cost Button

Comment Button

Assign Technician Button

Show only distinct values from the query's result

Path: Files > My Dashboard

Work Order with three Tasks was counted three times.

When you opt for *distinct values*, you can drill down to Task level of the record for details about a Work Order.

If the query has no multi-task or schedule records, it returns the same data with or without the "distinct" check box marked.

This enhancement applies to all four graphic types: Bar Chart, Pie Chart, Digital, and Dial Gauge. It has been requested over the years in many Community suggestions.

Acknowledgement Enhancements

Task Information

Add Task

Option	Acknowledgement Required	Acknowledged Date	Acknowledged By
	<input checked="" type="checkbox"/>		
	<input type="checkbox"/>		

Task Information

Task Code	100025	PM Task Sheet	Due Date	05/08/2028 15:41
Task Desc	1Y-Regional Buildings-Fire Drill-1st Shift-NC-MR		Rate Schedule Code	
Trade Description	Carpentry Supervisor	Rate Schedule Description	Contractor Code	
Key#		Contractor Name	Contract #	
Key Description		Acknowledged Date	05/08/2028 15:58	
Key Holder		Acknowledged By	Chas Alpert	

Path: Transactions > Work Order > Records

Summary: The Acknowledgement fields for Work Orders have been relabeled and enhanced for clarity and better visibility.

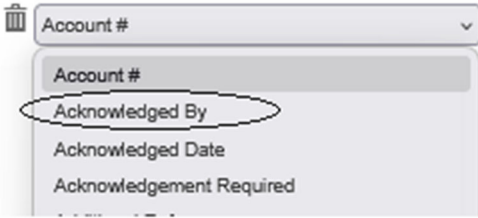
Details:

The *Acknowledgement* label on the *Work Order / Identity-Task Information* section has been changed to *Acknowledgement Required*.

For single-task Work Orders, *Acknowledged By* has been added as a read-only field below the *Acknowledged Date* field. These two fields are visible on the single-task Work Order only when they are populated.

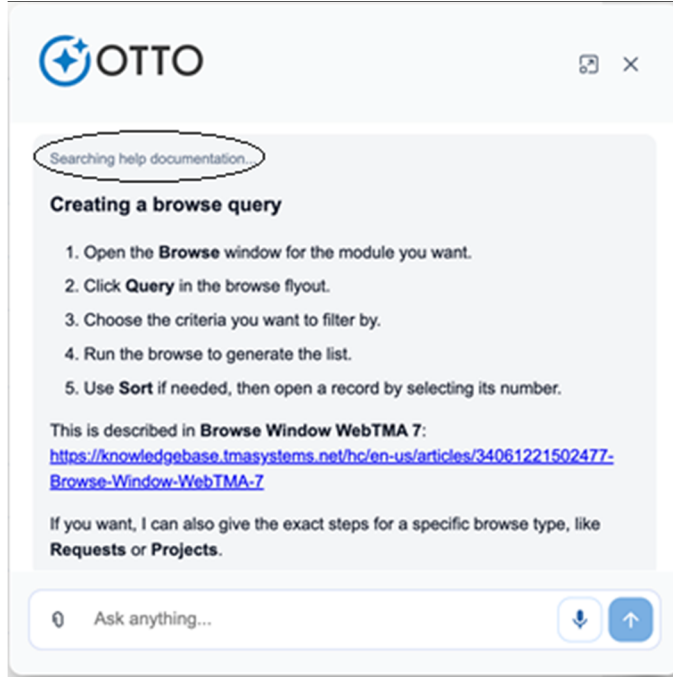
In the *Find* flyout on the Work Order window, the *Acknowledged User Initial* query option has been replaced by *Acknowledged By*.

These fields are populated when a Work Order is acknowledged from either the main application or WebTMA mobile.



Path: *Transactions > Work Order > Records-Find*

OTTO Now Searches the Knowledge Base

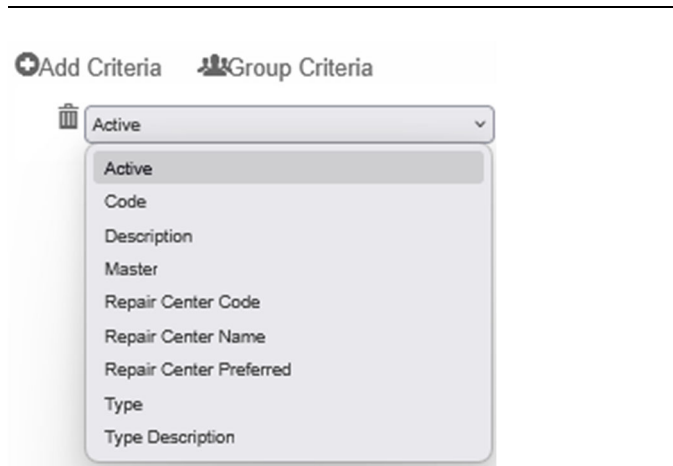


Summary: OTTO, the new AI Work Order Assistant, now draws from the WebTMA Knowledge Base to help answer your questions.

Details:

When an appropriate article is found, OTTO gives you a summary of how-to steps as well as a URL to see the complete article in the Knowledge Base.

Custodial Template Query Additional Fields



Path: *Transaction > Custodial > Custodial Template*

Summary: More fields have been added to the selection drop-down for the *Custodial Template* window.

Details:

The following have been added for selection:

- Active
- Repair Center Code
- Repair Center Name
- Repair Center Preferred

For those who use the additional Custodial module, this provides a way to search for records for the specific characteristics.

Transfer Parts Budget Code Criteria Added



Path: *Material > Parts > Transfer Parts*

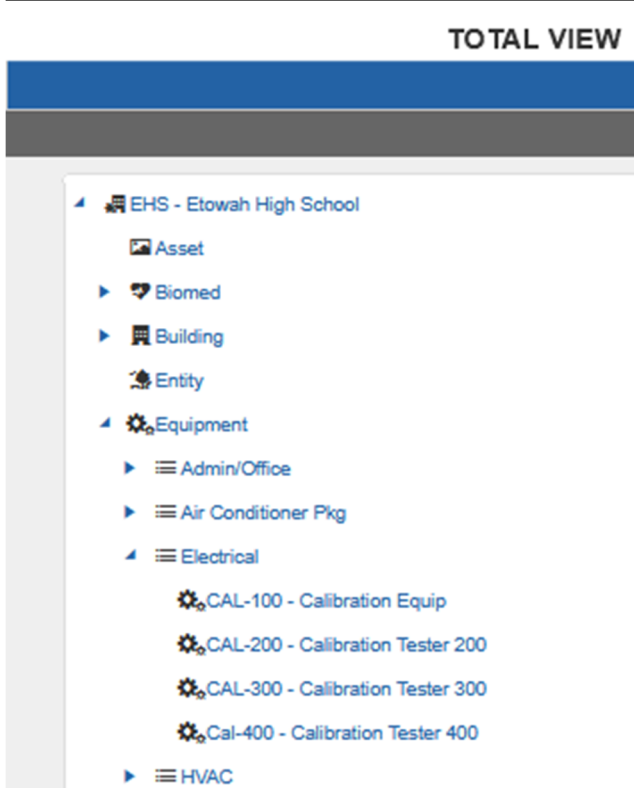
Summary: The *Transfer Parts* query window now includes *Budget Code* as a criterion.

Details:

This addition allows you to set up a query to track or search for specific Budget Codes or for transfers without a Budget Code.

April 28, 2026

VOC – Total View Enhancement



Path: File > Total View

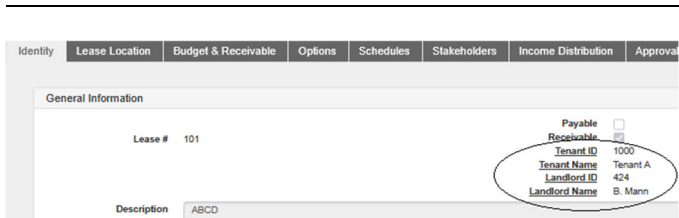
Summary: The *Total View* window now shows both the Code and Description as well as Type and Subtype if it exists.

Details:

If your naming conventions or descriptions are generic, the additional information helps you identify the correct item and location.

This is an April Voice of the Customer enhancement. It is a feature requested by New York State Department of Environmental Conservation. 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 – Lease Records Show Tenant & Landlord Simultaneously



Path: Organization > Lease Management > Records / Identity Tab

Summary: Both the Tenant and the Landlord are visible on all Lease records.

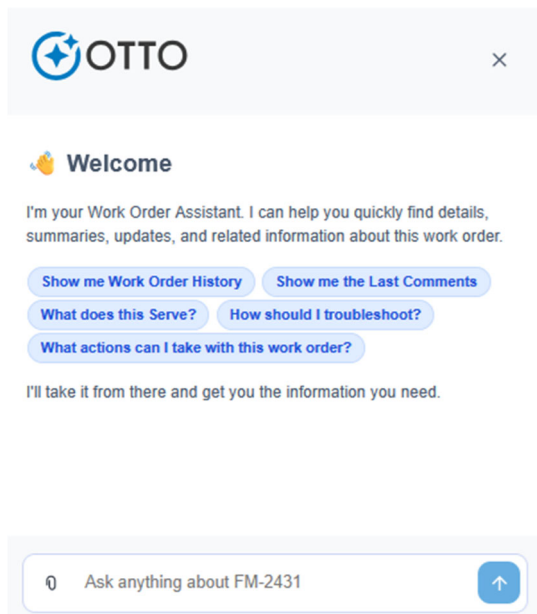
Details:

Previously, either the Tenant was visible for a Landlord record, or the Landlord was visible for a Tenant record.

This change allows you to generate a Report that includes both or to make a printed copy.

This is an April Voice of the Customer enhancement. It is a feature requested by University of Minnesota College System. 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.

OTTO – AI Work Order Assistant



Path: *Landing Page-Single Work Order OTTO Popup*

Summary: Our AI Work Order Assistant called OTTO gives you answers to questions about details, history, or other information about a Work Order. You can search for “how do I...” instructions and ask questions in real time. If you want to know what OTTO can do for you, click a starter question.


In addition to the Landing Page access mentioned below, User records have a new *Enable Otto* setting in *Admin > User Management > Records / Preferences* that must be granted.


Details:

OTTO is an AI-powered assistant in WebTMA that helps users quickly get answers such as work order history, recurring issues, and other questions.

You can diagnose and resolve problems for specific work orders faster without manually searching through records or linked documents.

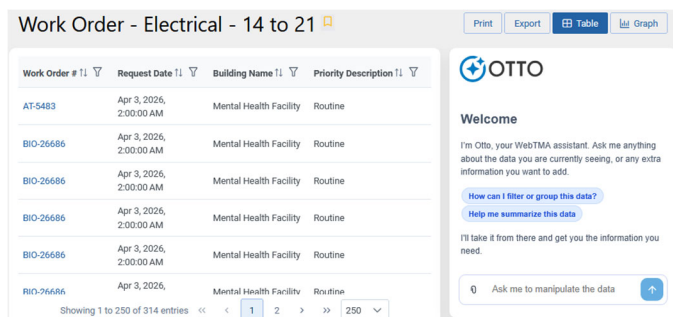
Currently, OTTO is available on the *Landing Page* and the *Browse Query* window (described in the next topic). If you have not Granted access to the *Landing Page* yet, follow the easy instructions [here](#).

On the Landing Page, you can ask questions about a specific Work Order using this icon  found with other icons on the Work Order line.

For more general Work Order questions use this icon  at the lower right.

A more comprehensive description of OTTO with tips for example prompts is [here](#).


OTTO and Browse Queries

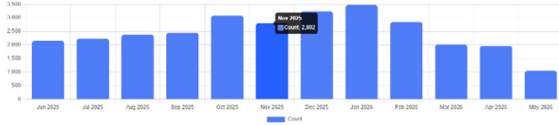


Summary: In addition to the Landing Page, OTTO is also present on the *Browse Queries* window.

Details:

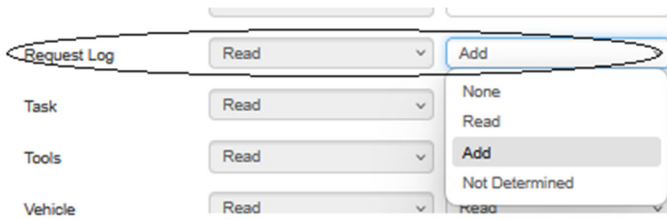
Here the OTTO window opens once you select a *Form* and *Query*. Like other OTTO windows, you can ask questions about the data.

You can display the data in a list or graphically where applicable. Click the  button once the list is displayed.



Path: Reports > Browse Queries

Technician Role Now Has 'Add' for Request Log Window Access



Path: Admin > User Management > Records / Window Access Tab

Summary: 'Add' permission has been included in the Technician Role selections for Request Log on the User / Window Access Tab.

Details:

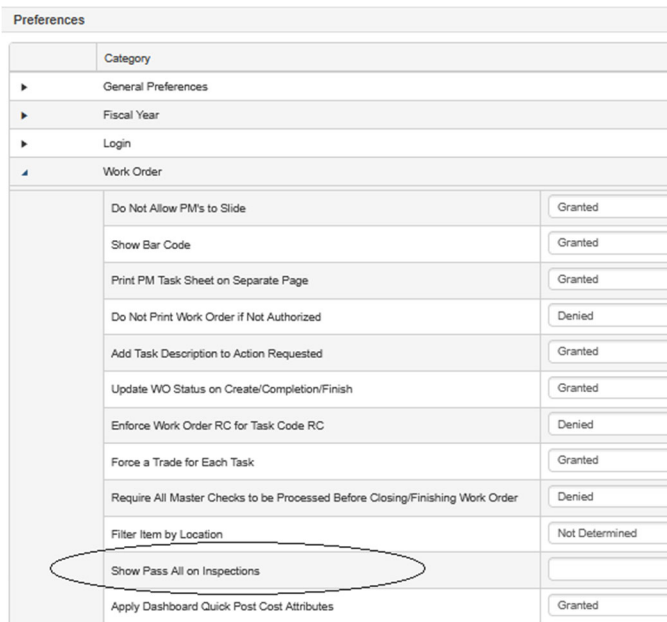
Previously, the only options were *Read*, *None*, or *Not Determined*.

This enhancement was made to allow Technicians who use WebTMA mobile to use the Request function.

Previously, only those with a User Role could add a request from WebTMA mobile.

NOTE: Technicians who log in to the main application can also add requests directly to WebTMA when this permission is added.

New Client Info Preference for Inspections Pass All



Path: Admin > Client Info / Preferences Tab-Work Orders

Summary: If you use the additional General Inspections module, you have the option to show or hide the *Pass All* check box on the *Inspection* or *Item Check List* flyouts.

Details:

When the *Show Pass All on Inspections* Preference is Granted, the *Pass All* check box is shown.

If you want to allow your Technicians to use the *Pass All* option, Grant the Preference.

This applies only to General Inspections in the web application because the web version of Master Checks does not have the option.

For **WebTMA mobile**, this applies to General Inspections **and** Master Checks because the option is available for both on the mobile device.

Inspection

Work Order # FAC-10797 Pass All

Checklist

Tag #

1st Floor North Entrance

- FE-0001 - Fire Extinguisher
- FE-0002 - Fire Extinguisher
- FE-0003 - Fire Extinguisher

Item Check List

Tag # B-15 Hide Finished Checks

Location Campus North, Admissions Office, 1, ADM-1 Pass All

<input type="checkbox"/>	#	Required	Check	N/A	Value
<input type="checkbox"/>	1	<input type="checkbox"/>	Check pressure - Pressure should be between 120-140lbs	<input type="checkbox"/>	<input type="text"/>

Cost Unit of Measure for WO and QP

Save Cancel

Identity Results Costs Billing Info Schedule Attachment Approval Routing His

Work Order # FAC-10144

Post Selection

Post Labor Post Part Post Other Post Test Item

Cost Summary

Path: Transactions > Work Order > Records / Costs Tab-Post Other

Work Order Cost Entry

Cost Type* Other

General Information

Work Order # FAC-10144

Task* 120010-Wall Hangings

Item Tag

Item Description* Non-MWI Item

Charge Type Desc

Unit

Quantity* BX

Unit Cost* CCF

CS

EA

Path: Transactions > Work Order > Records / Costs Tab-Work Order Cost Entry

Summary: The *Post Other* costs option on the *Work Order / Costs* Tab and in *Quick Post > Quick Post Other Charges* now have the option to indicate the type of *Unit* for non-maintenance-worthy items.

Details:

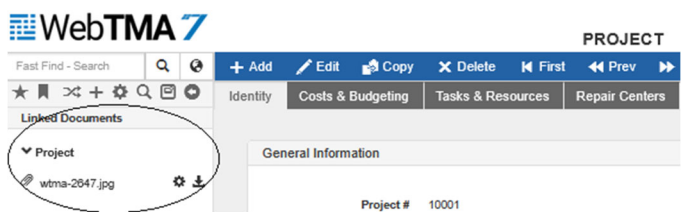
Previously, the field only allowed you to select rental time periods.

If you leave the default *Item Tag* on display and do not select an MWI item, you can enter your own *Description* and choose a *Unit* that corresponds to the object.

The selections available are those that you have created in *Organization > Lookups > Units of Measure*.

This new feature allows you to enter the appropriate unit for more than just rental of MWI items.

Request Conversion to Project Includes Linked Documents



Path: *Transactions > Project > Records*

Summary: When a Request is converted to a Project, any linked documents with the Request are also attached to the Project.

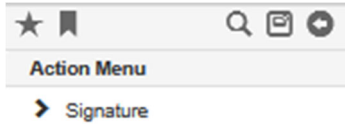
Details:

Previously, the attached document was not added to the Project record.

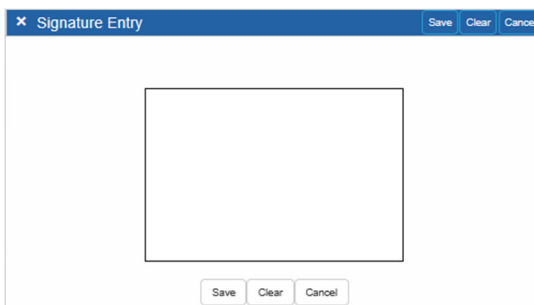
This allows all information made with the Request to be included on the Project record. These can include linked documents and images provided by a requestor for projects like event planning and large remodels.

April 14, 2026

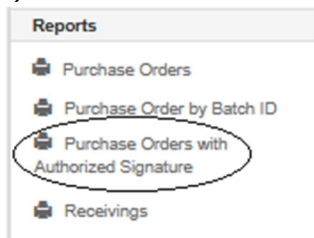
VOC – eSignature Added to User Record



Path: *Admin > User Management > Records (Edit mode)*



Path: *Admin > User Management > Records (Edit mode)*



Path: *Material > Purchase > Purchase Orders-Reports*

Summary: You can now store a signature with a User record that can be applied to a specific Purchase Order report.

Details:

The *Signature* link on the User record Action menu is available in *Edit* mode. Click the link for the same standard *Signature Entry* process used with Keys and other modules.

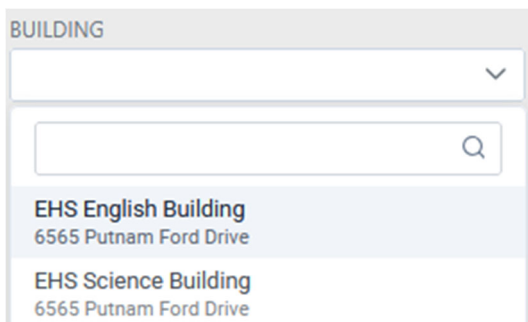
Purchase Order records that are approved are stamped internally with the authorizer's User ID.

When you run the report named *Purchase Orders with Authorized Signature* (available on the *Purchase Order* window), the authorizer's signature is automatically applied to the report if it is authorized by a user with a stored signature.

This allows you to print an electronic or paper report with a signature.

This is an April Voice of the Customer enhancement. It is a feature requested by Empresas Fonalledas. 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 – SRP Building & Area Fields Include Second Line



Summary: When you use a Building or an Area field in your Service Request Portal forms, a second line is automatically included.

Details:

The Building selection drop-down includes the contents of both the Building *Name* field and *Address*

Path: *Admin > Form Attributes > Service Request Portal*

Line 1 field as seen on the *Organization > Building / Identity* Tab.

The Area selection drop-down includes the contents of both the Area *Location ID* and the Area *Description* as seen on the *Organization > Areas / Identity* Tab.

This change helps your Technicians easily locate the site where work is to be performed.

This is an April Voice of the Customer enhancement. It is a feature requested by Banner Health. 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.

Service Request Form Forwarding to Service Request Portal

Path: *Admin > Form Attributes > Service Request Form*

Summary: The Service Request Form (SRF) is not WCAG 2.1 compliant; however, Service Request Portal (SRP) forms are compliant. If your request forms need to be WCAG 2.1 compliant, you can now forward an existing URL to an SRP.

We have created this option for clients who don't want to deploy new URL links or pages to users or a web site. A new field on the SRF window allows you to forward the URL to an existing SRP form.

Details:

The first requirement is that you have forms in the SRP. You can redesign or reuse the layout from your SRF forms.

The SRP forms meet the new accessibility standards.

Go to the *Admin > Form Attributes > Service Request Form* window:

1. Open the desired record.
2. Edit the form.
3. Use the new *Forward to Service Request Portal form* field drop-down.
4. Select one of the SRP forms.
5. Save.

The SRP form uses the original URL sent to your users for Service Request Forms.

NOTE: This does not apply to those who use the Requestor Login.

March 24, 2026

Workday Procurement Integration

Path: *Admin > Workday > Integration Log*

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 the 'Estimated Hours' field populated with the value '4.00'. Below it are fields for 'Estimated Labor' and 'Estimated Part'.

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

The screenshot shows a window titled "Estimate" with a light gray header. Below the header, there are three labels: "Estimated Hours", "Estimated Labor", and "Estimated Part". The "Estimated Hours" label is followed by a text input field containing the value "4.00".

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: jslong
 Date Created: 03/02/2026 10:51
 Last Modifier: PBW
 Last Modified Date: 03/20/2026 09:39

Record History

Date	User	Transaction Type
03/20/2026 09:40	PBW	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. Phone		False	WorkOrderLabor

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

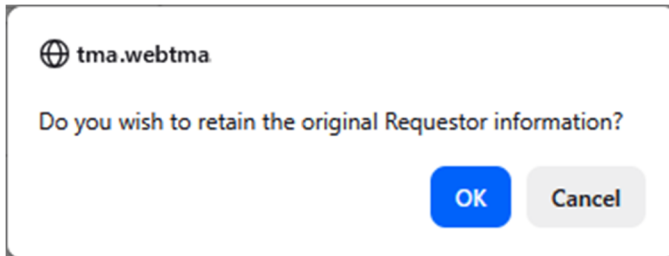
enhancement, you can now see labor entered from this window.

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:

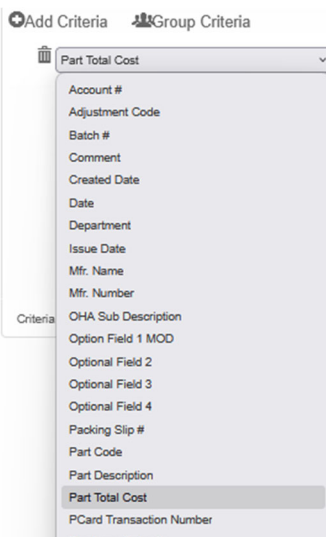
Previously, when you clicked *Copy* on the WebTMA toolbar, the contents of the *Requestor* fields were not carried over to the copied record.

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.com) 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, 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

The screenshot shows the configuration for the `OnHandAdjustment` endpoint. It is a GET endpoint located at `/v2/OnHandAdjustment/GetPurchaseOrderReceipt/{poNumber}`. The description is "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

The screenshot shows the "Audit History" window. It displays a table of record changes for a record created on 02/29/2028 at 08:56 by user PBW. The table lists the following fields and their values:

Date	User	Transaction Type	
02/29/2028 08:56	PBW	Edit	
Field Name	Old Value	New Value	Record Type
Date of Work		02/29/2028 00:00:00	WorkOrderPart
OnHandAdjustmentId		8898	WorkOrderPart
WholeSaleCost		2.0000	WorkOrderPart
InventoryId		1032	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:

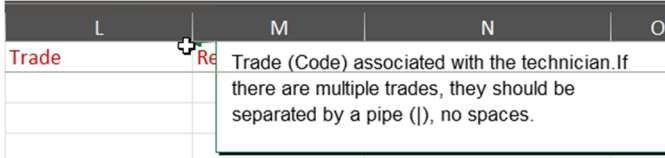
We have now expanded the *Work Order - Show Audit History* window to include information from *Quick Post Cost* and *Quick Post Material*. With this enhancement, you can now see Parts and Materials entered from *Quick Post*.

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



Path: Admin > Mass Import / Templates

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

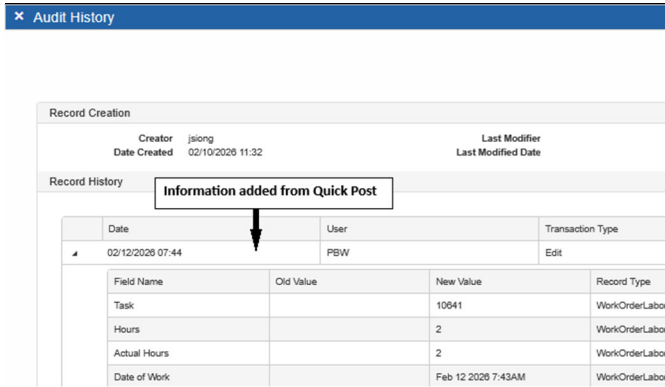
Details:

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.

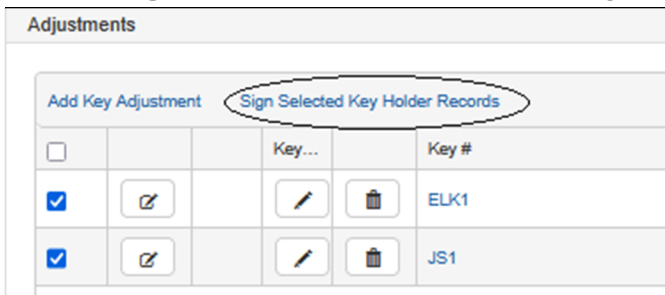
Details:

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

Adjustments

Add Key Adjustment Sign Selected Key Holder Records

<input type="checkbox"/>		Key...		Key #
<input type="checkbox"/>				ELK1
<input type="checkbox"/>				JS1

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

Identity Keys Key Rings History

Key Holder ID JBK II

History

	Type	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 Print Export

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.

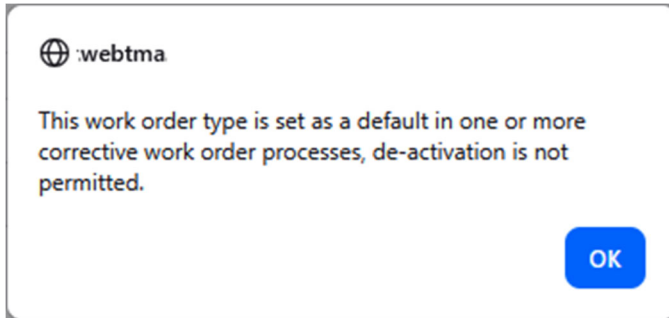
When you have selected a *Form* and *Query*, the resulting list includes *Print* and *Export* buttons at the top right of the page.

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:

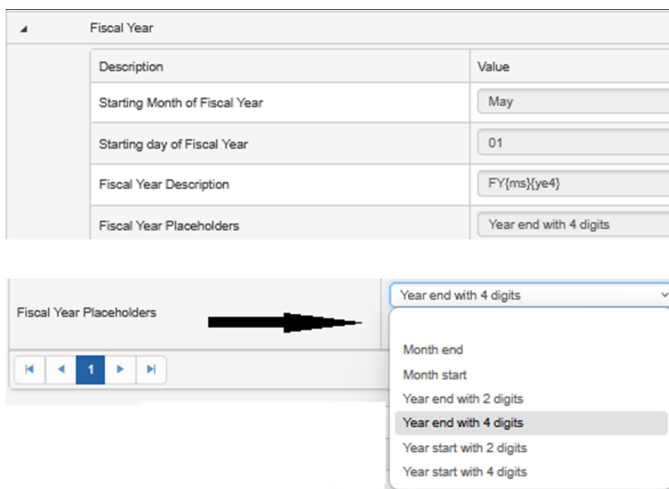
- Priorities (Lookups)
- Work Order Types (Lookups)
- Repair Center
- Task
- Trade

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



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	<input type="checkbox"/>
Chargeable	<input type="checkbox"/>
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

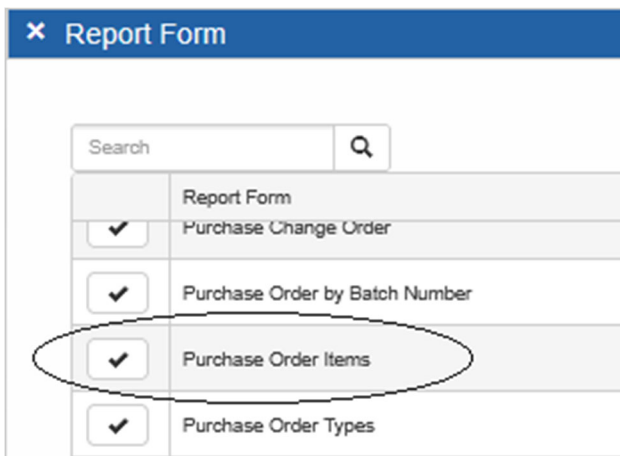
VOC – Mass Import Technician Template

<p>Technician Technician excel import template.</p> <p>Modified: Jan 28, 2026 TechnicianImportTemplate.xlsx</p> <p>Path: <i>Admin > Mass Import / Templates</i></p>	<p>Summary: A new <i>Technician</i> Template has been added to Mass Import.</p> <p>Details:</p> <p>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.</p> <p>Currently, only one Trade is imported; however, that will change soon.</p> <p>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.</p>
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Mass Import for MWI Now Has GIS Fields

 <p>Columns added to the Templates listed at the right</p>	<p>Summary: Several Mass Import Templates now include GIS-related fields for maintenance-worthy items (MWI).</p> <p>Details:</p> <p>Importing this information allows you to use the information with TMA's internal GIS map and MapIt! function.</p> <p>The GIS fields are:</p> <ul style="list-style-type: none">• GIS Id• Latitude• Longitude <p>The fields have been added to the following Templates:</p> <ul style="list-style-type: none">• Area• Asset• Building• Equipment• Floor <p>In addition, the Area Template now includes <i>Area Function</i>.</p>
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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

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			
▶ BIC-11687	01/29/2026 08:39		Floor	Floor A		BIOFAC	Com			
▶ BIC-10240	06/20/2023 15:33		Area	123-12345	Dormitory-12345	BIOFAC	Com			
▶ FAC-10295	09/20/2023 15:57		Building	123	Building A	BIOFAC	Plan			

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:

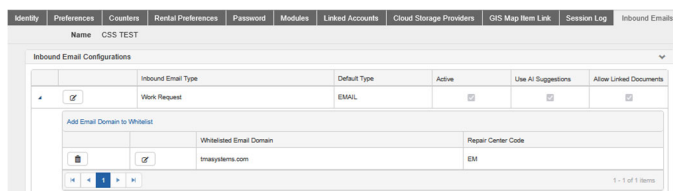
These are now available in the Swagger WebTMA Platform API.

These new APIs are fully described in our [Swagger](#) documentation.

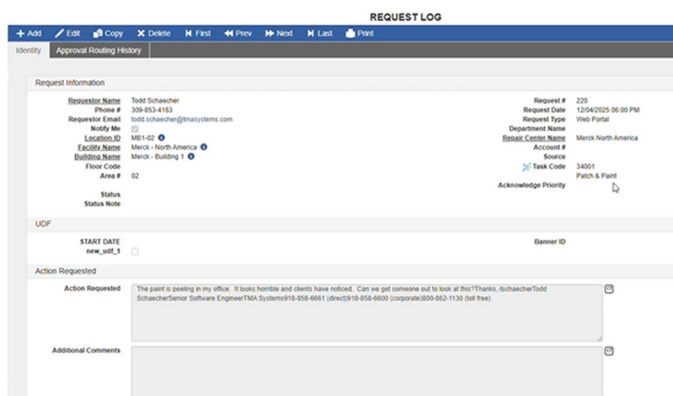
January 6, 2026

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

VOC – AI Email Work Request



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.

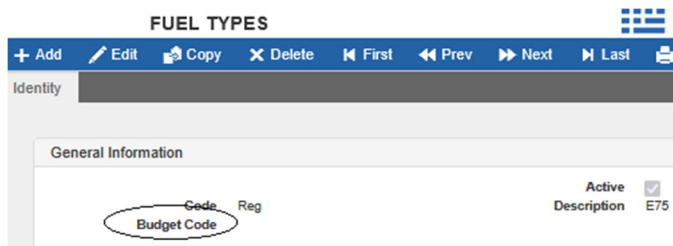
The requestor’s message is included in the *Action Requested* field, and if you choose, AI suggests a *Task Code* based on the content of the message.

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*

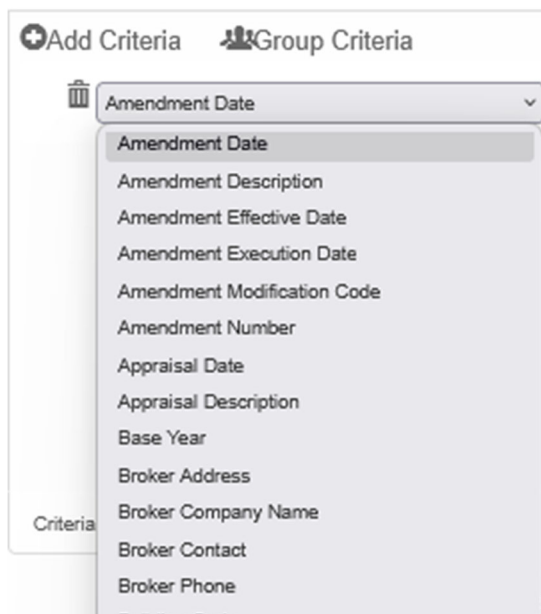
Summary: A new *Budget Code* field on the *Fuel Types* window applies to Credit Accounts for the *Fuel & Oil* window.

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.

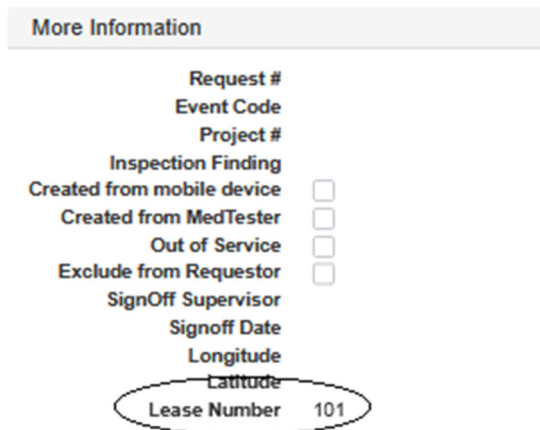
Details:

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*

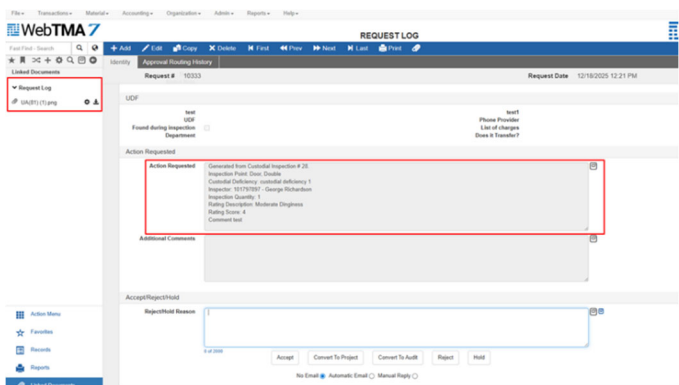
Summary: When you generate a Work Order from the *Punch List* section of Lease Management records, the *Work Order* window now includes a *Lease Number* field.

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.

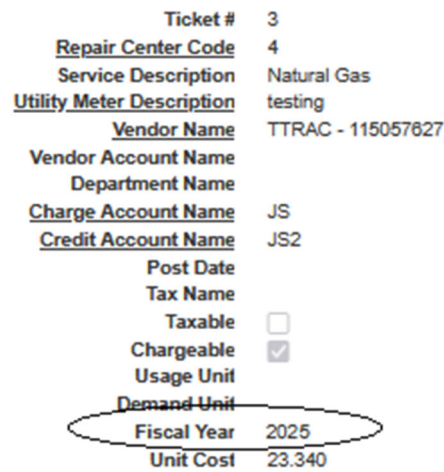
Details:

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.

