Society Dashboard Updates (Dec' 2024)

Multi-level Approval for Expense and Payments

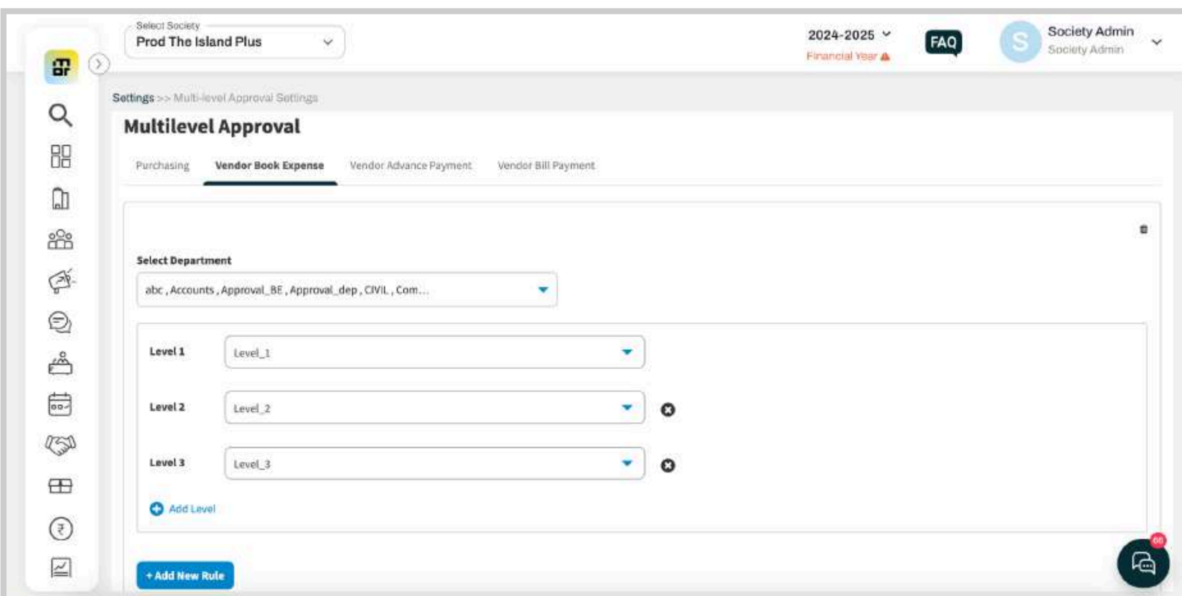
After the delivery of goods or services, societies receive bills from their vendors requiring significant fund outflows on a recurring basis. To ensure accuracy and eliminate risks of incorrect payments or corruption, it becomes crucial to validate these expenses through the committee members. To address this, a multi-level approval flow has been introduced for processing expenses and vendor bill payments, similar to the already existing PR/PO workflows.

This provides the following benefits:

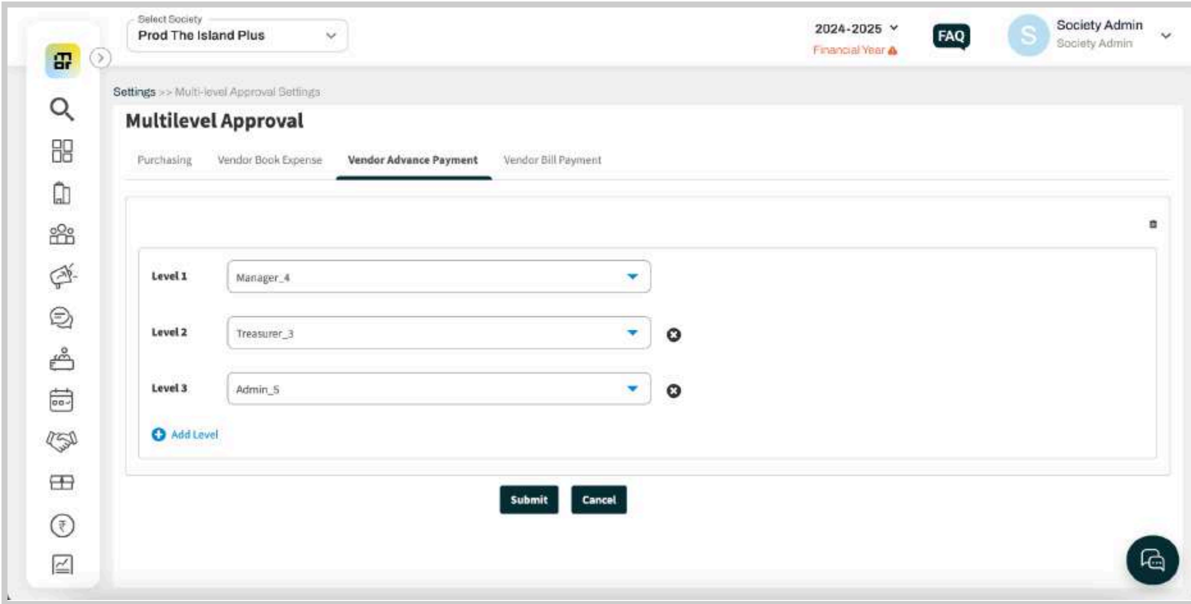
1. **Avoid Errors and Corruption:** With payments approved through multiple levels, the chances of wrong payments or fraudulent activities are significantly minimized.
2. **Enhanced Transparency:** The approval flow fosters transparency among committee members, ensuring collective decision-making and accountability.

Steps to setup and other notes :

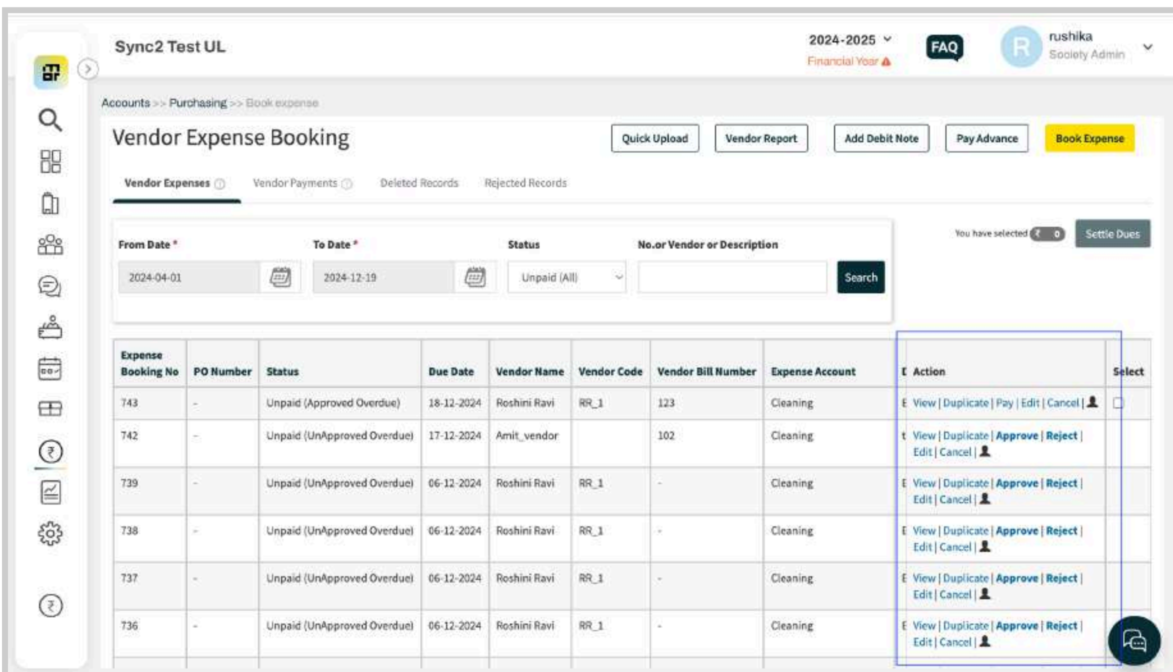
1. Similar to the PR/PO approval matrix, Vendor Expense Booking can also be set at a department level.
   Path : Dashboard >> Settings >> Multi-level Approval Settings >> Vendor Book Expense



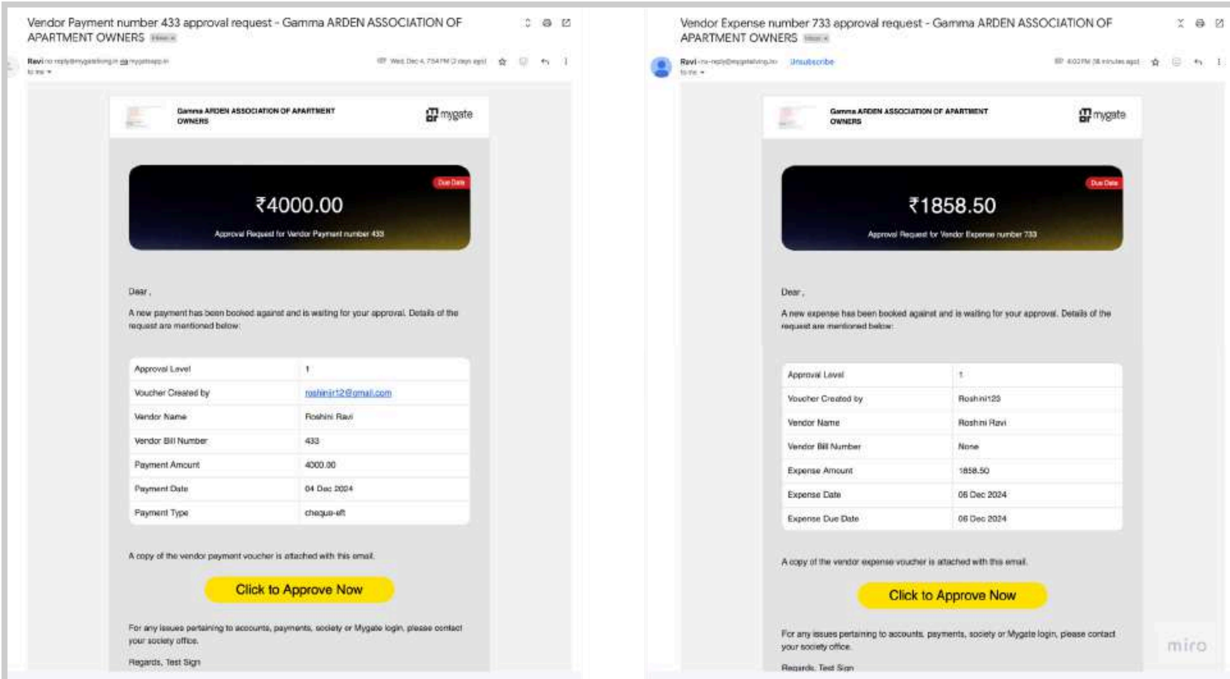
2. The Vendor Advance & Bill Payments, however, cannot be set up at department level. This is due to a single payment entry being possible for multiple vendor bills.
   Path : Dashboard >> Settings >> Multi-level Approval Settings >> Vendor Advance OR Bill Payme



3. Approval for the above entries can be done by the concerned admins from the Vendor Expenses and Vendor Payments tabs. They receive intimation emails to remind them of the same.
Path : Dashboard >> Accounts >> Purchasing >> Vendor Expense & Payments



Approve/Reject buttons for admins (with status column for filtering)



Emails sent for approvals

4. Similar to the PR/PO flow, if an update is made to the Vendor Expense/Payment after a few levels of approval, the matrix restarts from level 1.
5. Debit note (booked against vendor bill/expense) -
    a. Stay in an unapproved status until the parent document is fully approved
    b. Can only be created one to one basis against unapproved vendor bill/expense
    c. Cannot be booked against an approved and an unapproved vendor bill together
6. Unapproved entries are not be reflected in vendor statements and reports

Audit Log for Accounting Modules

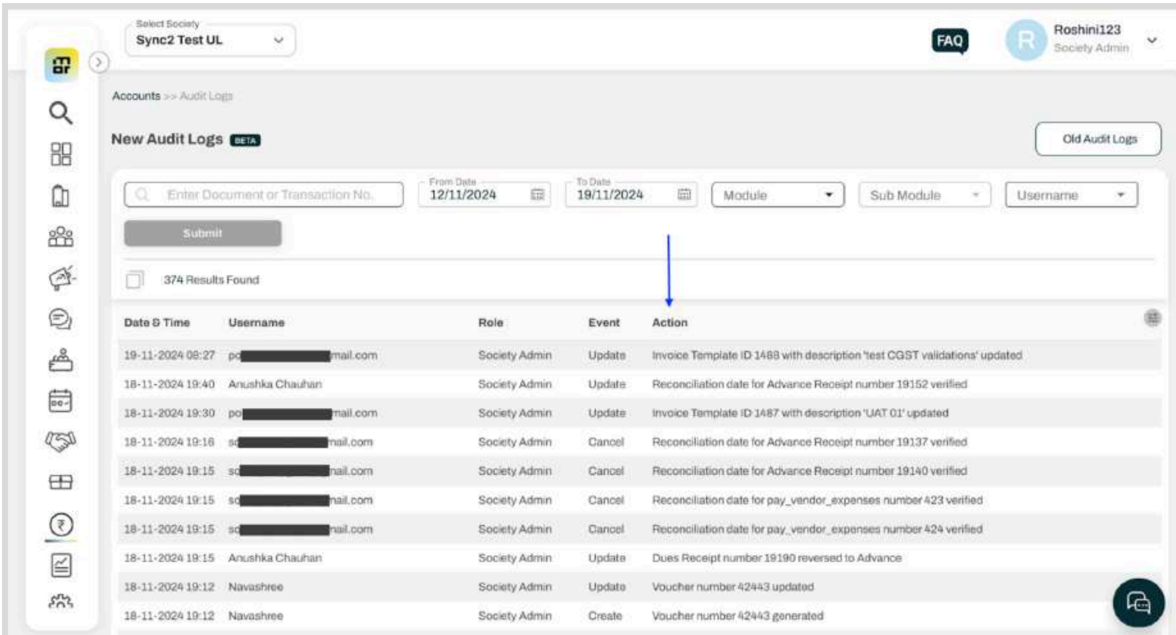
Path : Dashboard >> Accounts >> Audit Logs

Dashboard users can now access a comprehensive log that provides a detailed overview of key updates or changes related to creation, updates, cancellations/deletions, and communication across major accounting modules and login/logout activities. This feature, currently in *Beta*, will be continuously improved to enhance its functionality.

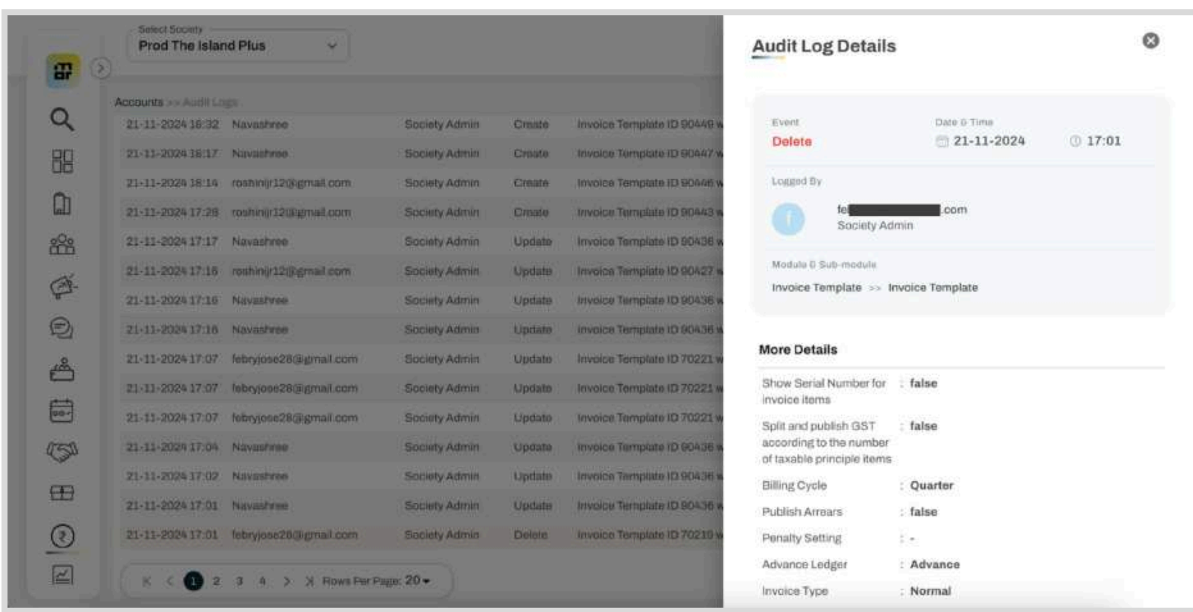
This provides the following benefits:

1. **Enhanced visibility and accountability:** Dashboard users can stay informed about all significant changes and updates made within the major accounting modules.
2. **Error identification:** The detailed logs help users identify and rectify unintended mistakes or discrepancies in the system

*Note: All changes will continue to be recorded in the old audit log module as well. For logs prior to 1st November 2024 and those comfortable with the previous interface, users can easily access the old audit logs quickly!



All latest logs available on the top of the listing page



Deep information displayed for each user action on detail page

‘Parking List’ for resident vehicles and their spots

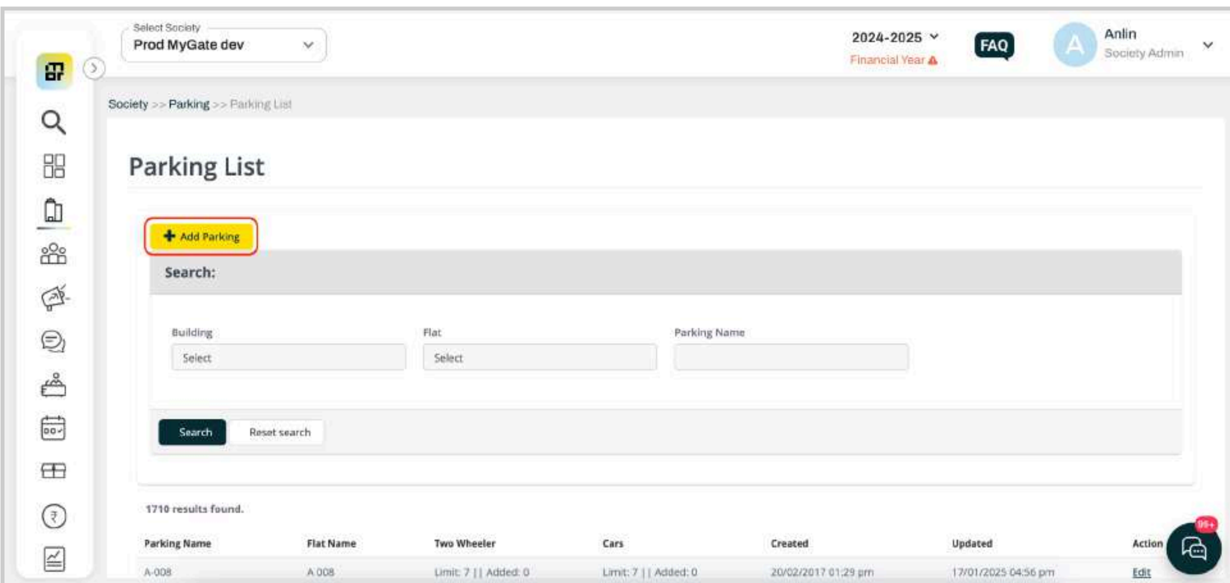
Path : Dashboard >> Society >> Parking >> Parking List

Managing the parking spaces and the flat vehicles was always a hassle for the admins. We have simplified the vehicle management further by introducing a new feature called ‘Parking List’. This will help the admins

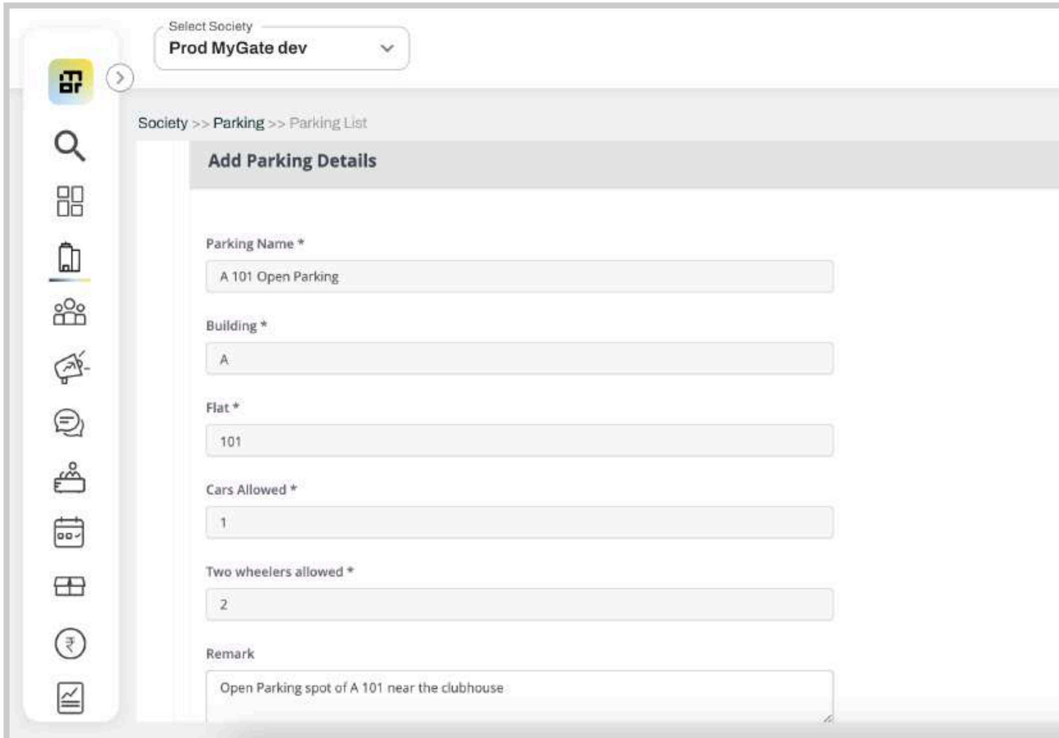
- To add multiple parking names for each flat
- To assign the vehicle limit for a parking spot
- To manage the flats which have multiple parking spaces
- To know the vehicles assigned to the parking space

Admins can follow the steps below to create the parking list.

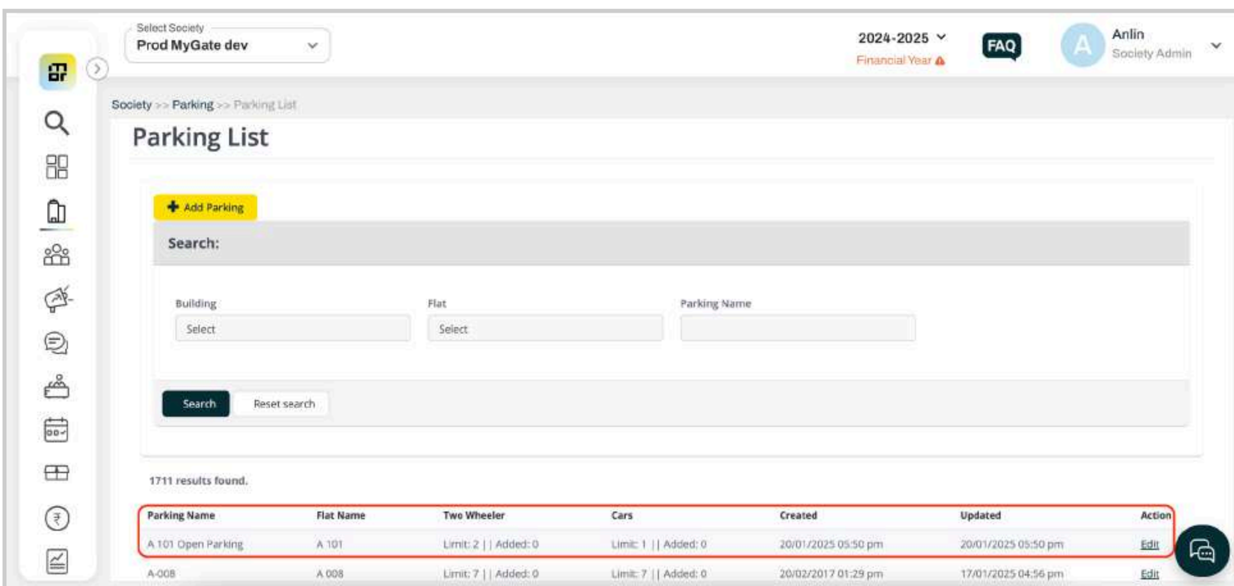
1. Go to the Parking List page (*Dashboard >> Society >> Parking >> Parking List)* and then click on ‘Add Parking’.
2. Enter the parking name, flat and other information in the form. The admins can also enter the remarks against each parking name.
3. Once created, the admins can see the same information in the list along with the vehicle limit and the vehicles added against the parking name.



Click on ‘Add Parking’ to add new spot



Parking addition form



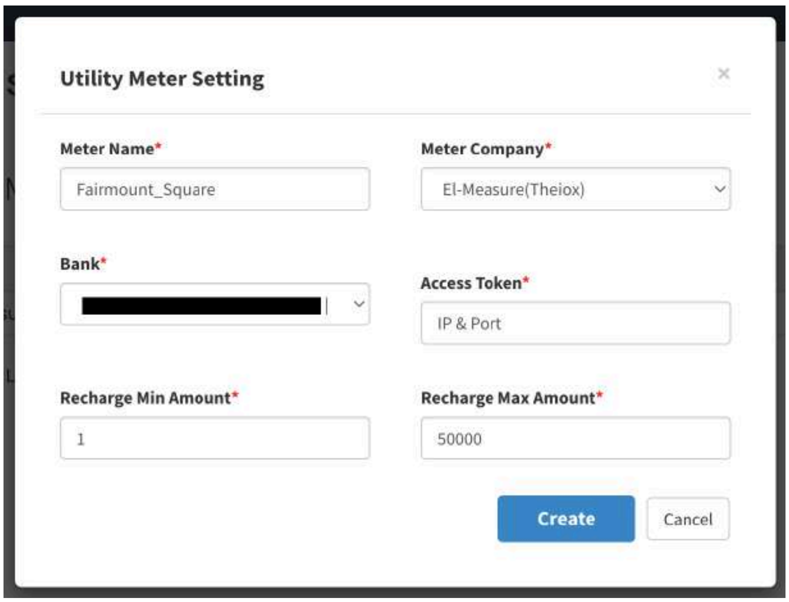
Parking List after resident spots are added

New Prepaid Meters Integrated

1. Elmeasure (Theiox) Meter - (Hyderabad)

Elmeasure is one of the most popular meter companies associated with us, serving more than 50k units through our integration. Until now, their system used to communicate via society-based local machines, which frequently led to slow network related issues. Now, they have shifted to Theiox (a server-based) model which promises better performance and stable uptime.

Similar to the older version, the following details are required to onboard the meter -
A. Society’s Access token (not to be shared with any 3rd party)
B. Meter numbers and Customer IDs for each flat



Elmeasure (Theiox) Meter Setup

2. Mygate (Virtual) Meter

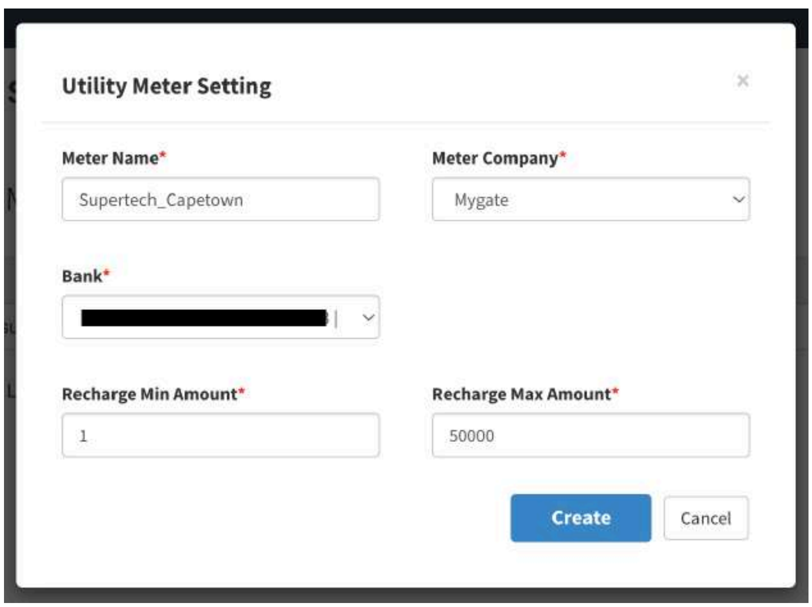
For societies using a meter company that is not integrated with Mygate, we have rolled out a concept of virtual meters. With this new flow, the prepaid meter module can be activated for a society and the resident app users will be able to make 'recharge payments' for their flats. They will be issued prepaid meter receipts against their transaction and the admin will also be intimated. Once this step is complete, the admin can post the recharge manually into the meter company's dashboard.

Benefits of the above are as follows -

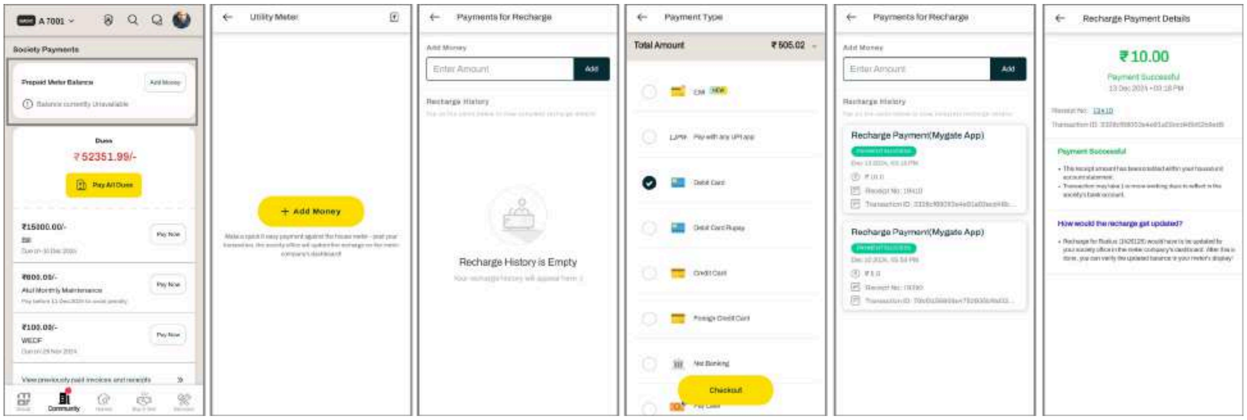
1. Residents and admin are exposed to the actual prepaid meter module and recharge flows. In future, if their meter company is integrated with Mygate, it will be easy to graduate them to the real meters.
2. 'Block defaulter' feature can be readily used to ensure that houses with high pending dues are not able to make recharge payments for their meters.

The following details are required to onboard this virtual meter -

A. Meter Numbers for each flat (while these meter details can be dummy, it is better to onboard the society with actual info for better experience)



Mygate (Virtual) Meter Setup



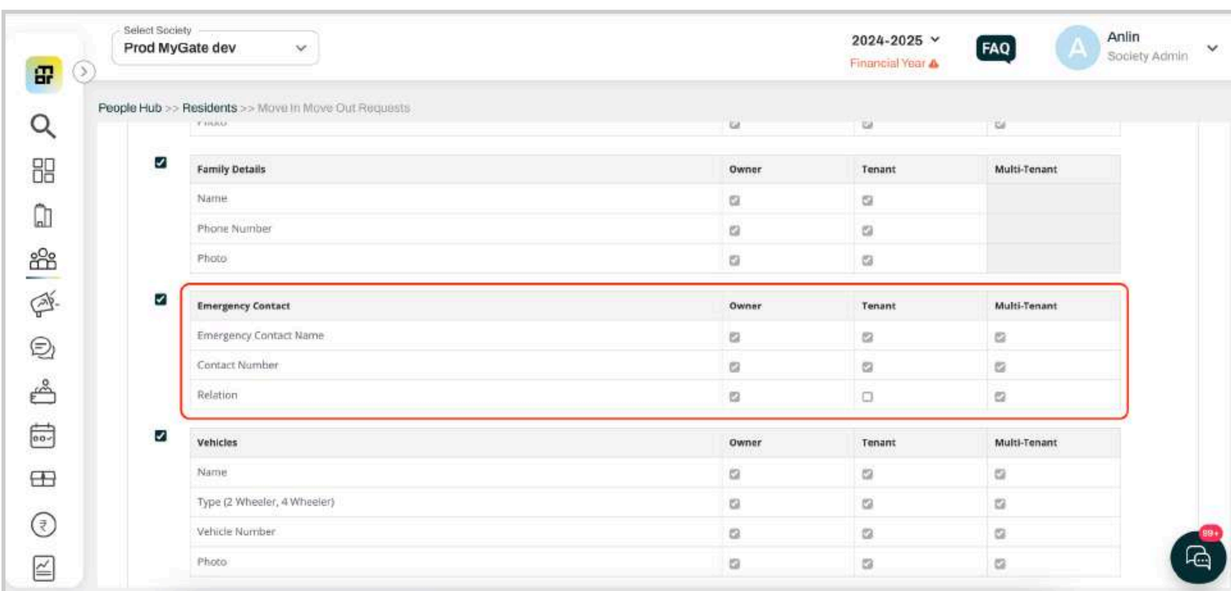
Mygate (Virtual) Meter resident app flow

Move In Move Out process upgrades

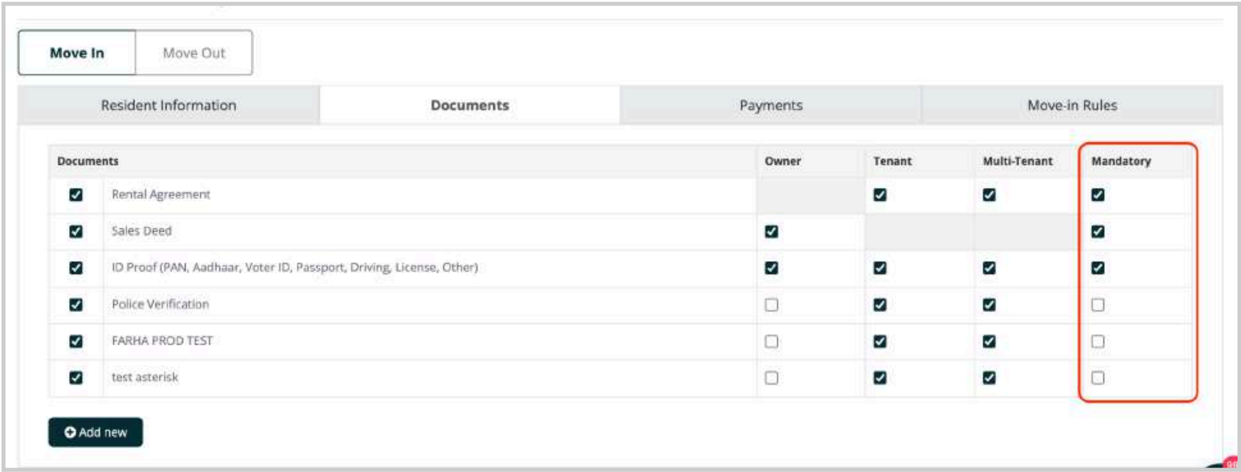
Path: People Hub >> Residents >> Move In Move Out Requests

We have enhanced the move-in process to capture essential resident details, allowing admins to configure additional information from the residents.

1. Nationality of the residents - This will be beneficial in case of any foreign nationals residing in the society. 'India' would be the default selection
2. Emergency contact details - Admins can configure this section to capture emergency contact details from residents, facilitating quick communication during emergencies.



3. Pet Ownership - Residents without pets can now indicate that they don't have a pet, eliminating the need to provide mandatory pet details when the pet section is configured by the admins.
4. Flexibility to mark documents as 'non-mandatory' - Admins can now choose which documents are mandatory, allowing residents to fill out only the required ones based on the configuration.

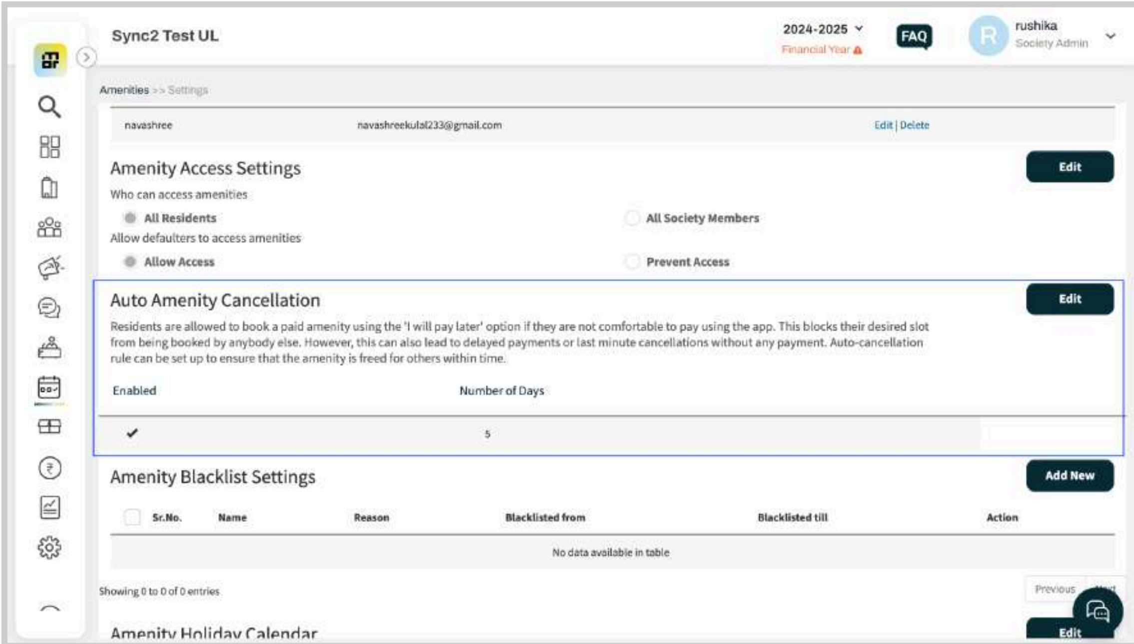


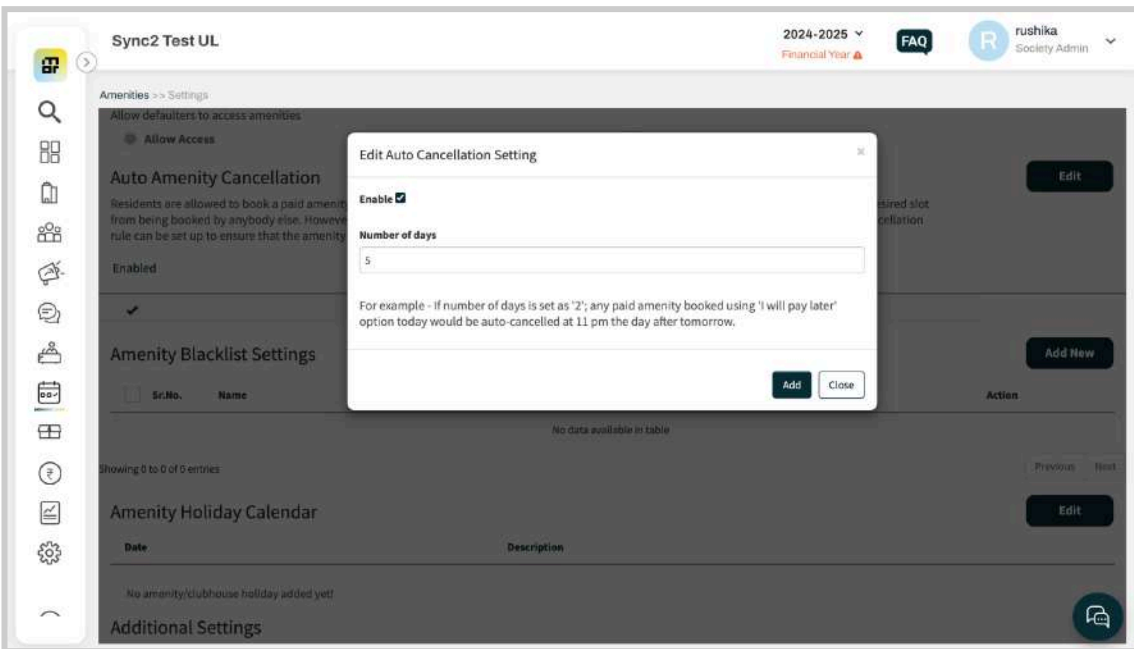
Amenity Booking setup updates for better experience

With growing demand from cities and societies migrating from other platforms, the Amenity Booking setup has been updated to provide a smoother and more intuitive experience. These enhancements aim to simplify the booking process and cater to the evolving needs of users, ensuring a seamless transition for all communities.

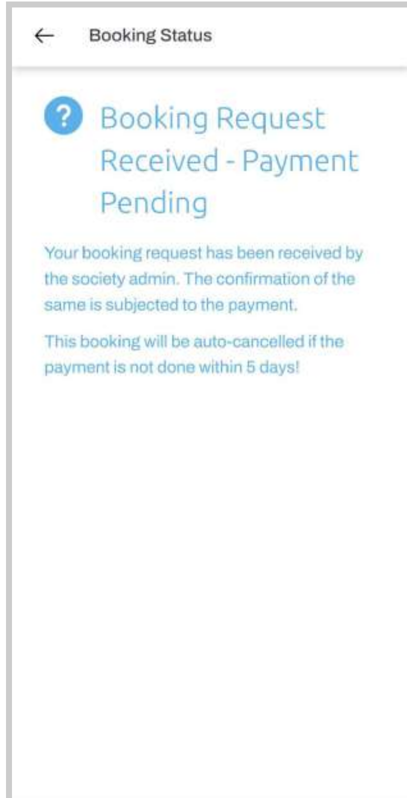
1. **Auto Cancellation of Unpaid Amenity Bookings**

   This is a setting-based feature that applies to all amenities, where the admin or facility manager can enable the setting and define the time frame for auto-cancellation of unpaid bookings.
   When this setting is active, any paid amenity booking made by residents with the "I will pay later" option will automatically be canceled if the payment is not made within the configured days period.





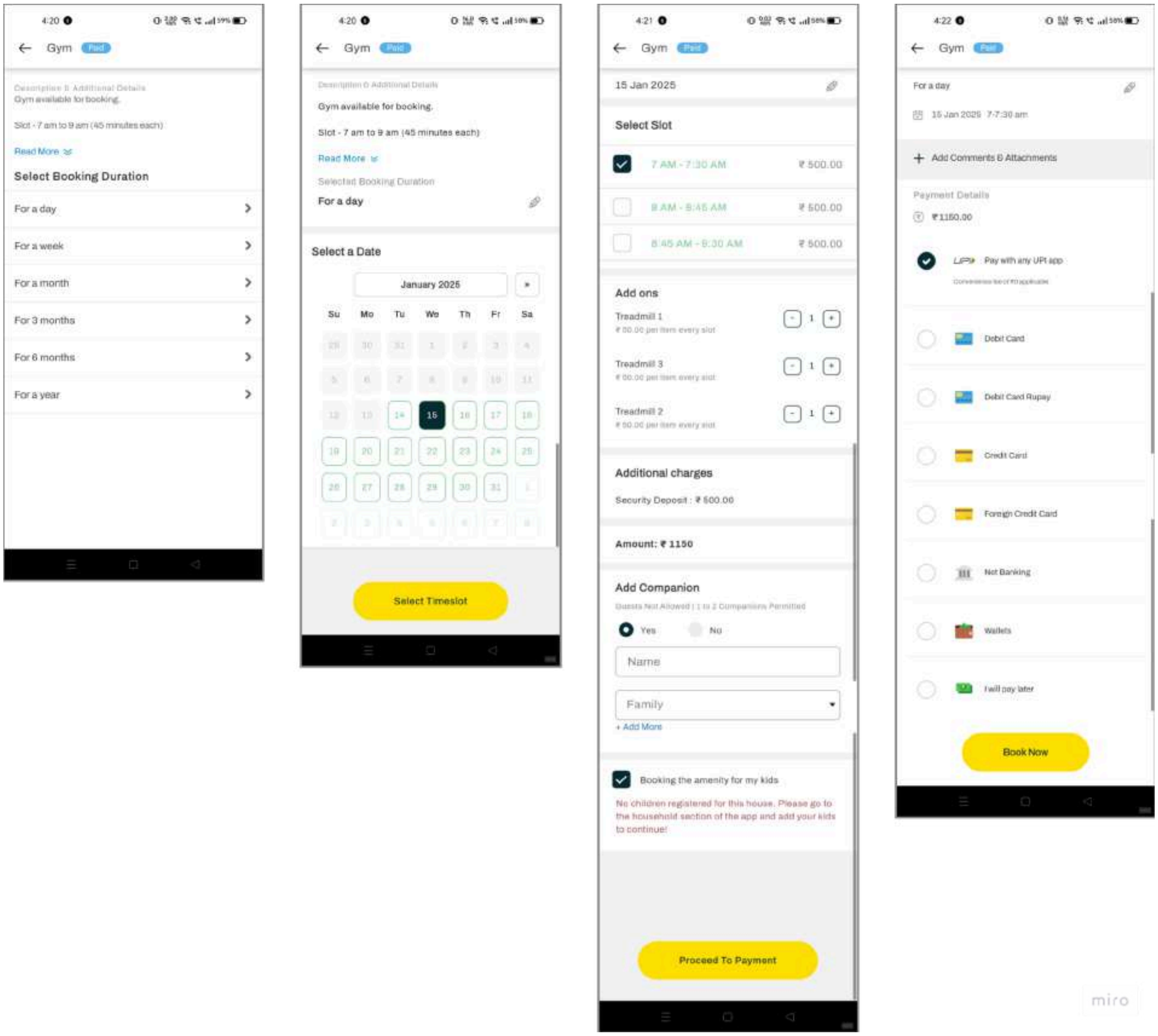
Configurable setting for all paid amenities



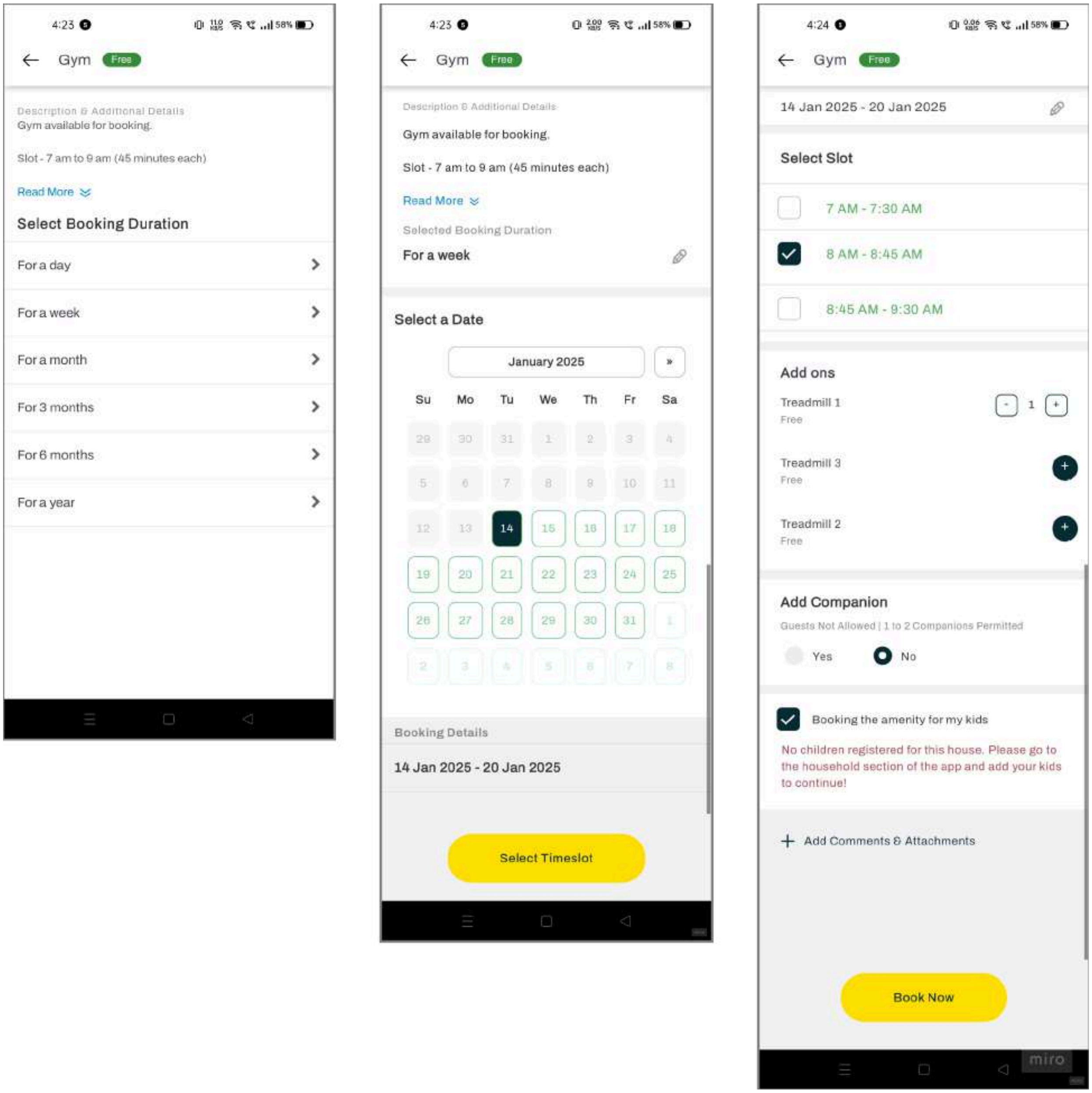
Residents are intimated at the end of the booking flow

2. Revamped Amenity UI on app for better experience

The amenity booking process on the resident app has been revamped to provide an enhanced user experience and greater satisfaction. The updated flow features a more intuitive and visually appealing interface, designed to make the booking process seamless and hassle-free.



Booking flow on app for Paid Amenities

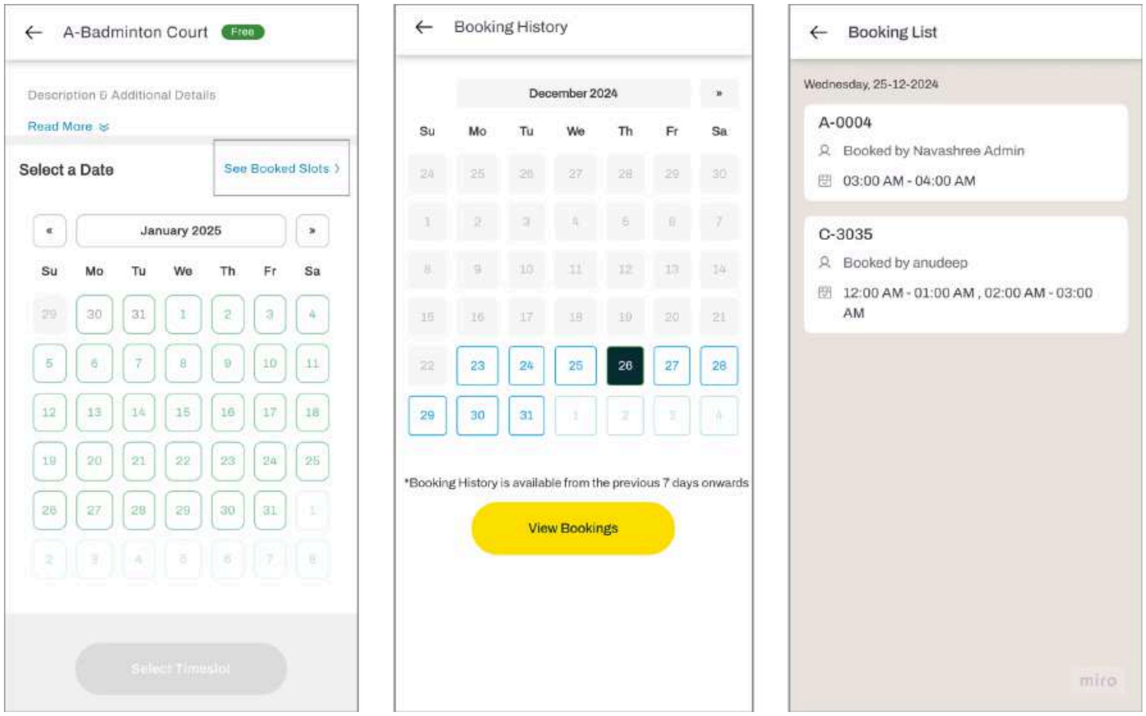


Booking flow on app for Free Amenities

3. Publish society resident's booking details

To enhance accountability and reduce overbooking during peak hours for popular amenities (e.g., badminton courts in Bengaluru, tennis courts in NCR), this feature allows residents to view the booking details (name and unit number) of others who have reserved the same amenity.
By increasing such visibility, it helps address "no-shows" and ensures fair access.

Note - This feature is configurable at the amenity level, allowing admins and managers to enable it for specific amenities as needed.



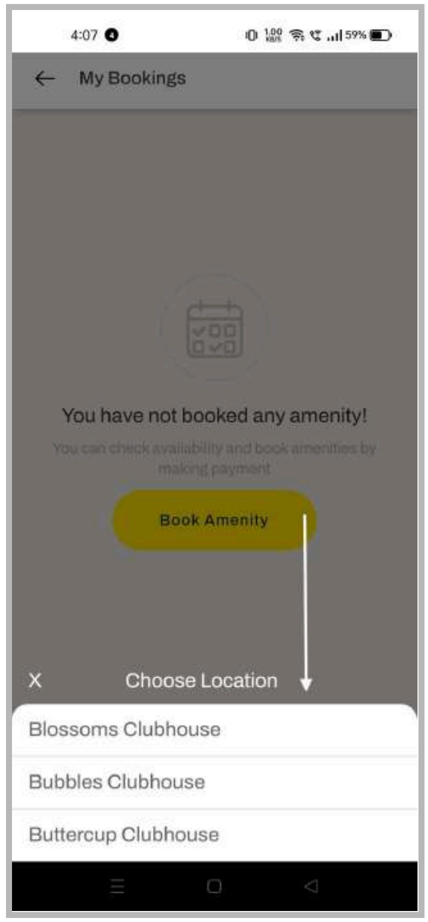
View Bookings flow on the app

4. Amenity Location Grouping improvement

Amenities grouped under the “Amenity Group” setting (Location based) are displayed separately on the resident app, while the ungrouped amenities will now be listed under the “Others” location group. Previously, grouped as well as ungrouped amenities were displayed under “All” location group, which did not provide much clarity.

Note -

1. Already grouped amenities will not appear in the ‘Others’ location group.
2. If all the amenities are grouped for a society, ‘Others’ location group would not appear of the app (image below)



Additional Updates

1. Deleted admin list is now available in the table on the ‘Manage Admins’ page (using a filter) - this ensures a log of previous admins and who deleted them
2. "All Societies" helpdesk summaries can now be downloaded with individual society-based categorization included for each summary.
3. Flat document delete option for admins has been made available through the ‘Flats & Amenities’ List - go to the flat detail page to take this action.
4. The Helpdesk SLA Summary has been updated to base its calculations on the resolution of tickets within the specified week