

ERP Dashboard Updates (Jan' 2025)

'Deactivate' Invoice Templates that are not in use

Path: Accounts >> Invoicing >> Raise Invoices

Based on feedback from society admins and managers, the option to activate or deactivate an invoice template has been reinstated. When a template is deactivated, automatic invoice generation for the specific template will be stopped even if already configured.

The screenshot shows the 'Raise Invoices' page in the ERP dashboard. A dropdown menu is open over the 'GAS Charges' template, showing options to 'Active' or 'Inactive'. The 'Inactive' option is highlighted, with a note: '(Note: Auto generation of invoices will be stopped)'. Below the menu is a table of invoice items.

Description	Item Ledger	GST	HSN/SAC	Item Type	Occupant Type	Towers	Amount
GAS		No		Meter Based	Owners, Tenant, Vacant	All Towers	₹ 0.00 (-₹ 0.00)

Description	Item Ledger	GST	HSN/SAC	Item Type	Occupant Type	Towers	Amount
Item 1	6767	GST	1234	Amount Based	Owners, Tenant, Vacant	All Towers	₹ 1240.0 (-₹ 50.00)
Item_2	Maintenance	GST		Amount Based	Owners, Tenant, Vacant	All Towers	₹ 1800.0 (-₹ 120.00)

Option to mark a template as 'inactive' on the template listing page

Expense Tagging & Reporting of Purchases

Tagging expenses is a valuable practice for maintaining organized and transparent book-keeping. With expense tagging, society admins and managers can benefit from:

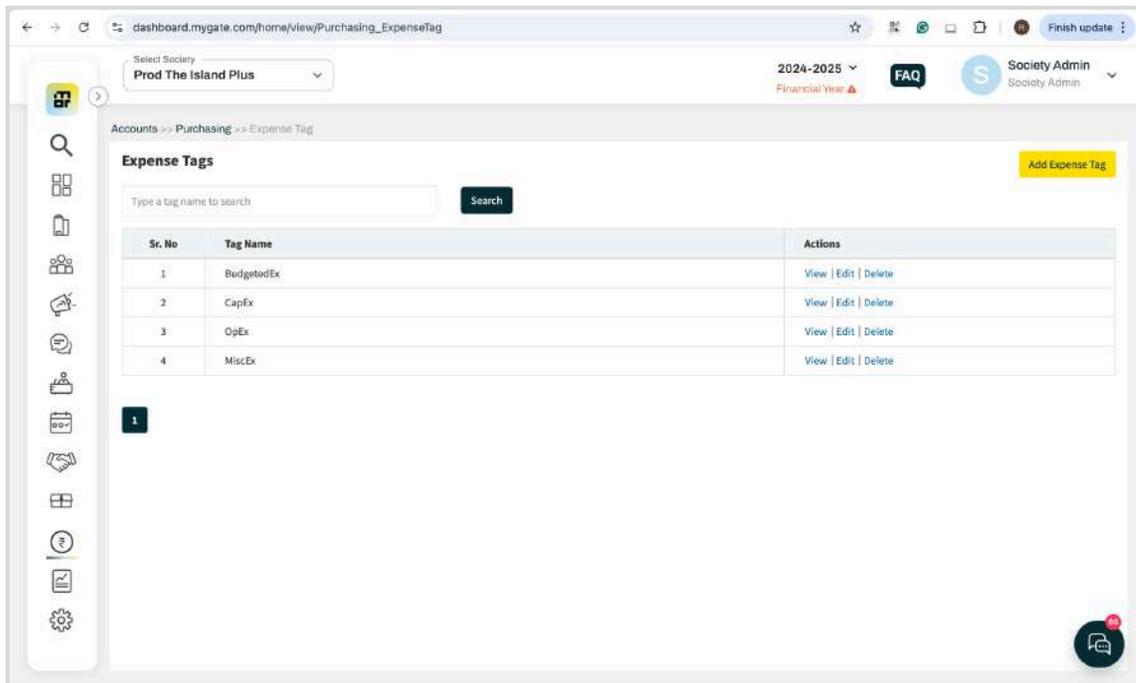
- Clear Financial Categorization of expenses
- Improved Budgeting for the upcoming financial year

- Simplified Auditing processes
- Better Compliance and Reporting with legal and tax requirements
- Enhanced Financial Decision-Making and Transparency

Steps to create an expense tag and use it during purchase flow:

1. *Path: Accounts >> Purchasing >> Expense Tags*

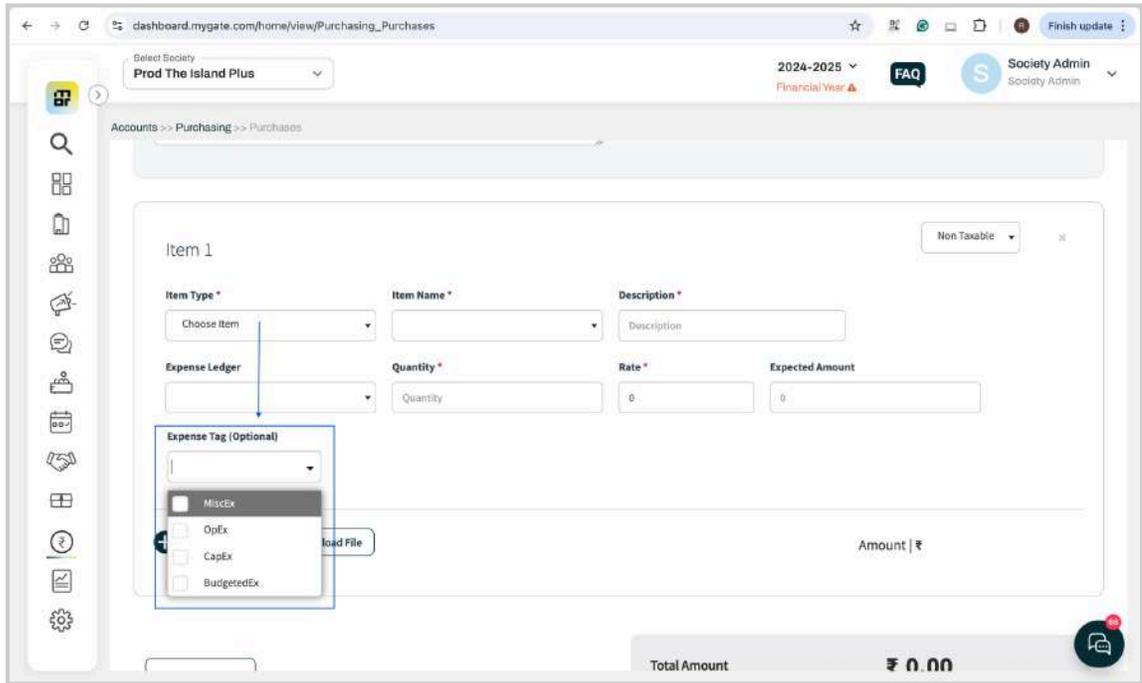
A separate menu allows the society admins and managers to create/edit tags such as - Capex, Opex, Misc Ex, Budgeted Ex and Discretionary Ex, etc..



Option to add/edit an expense tag

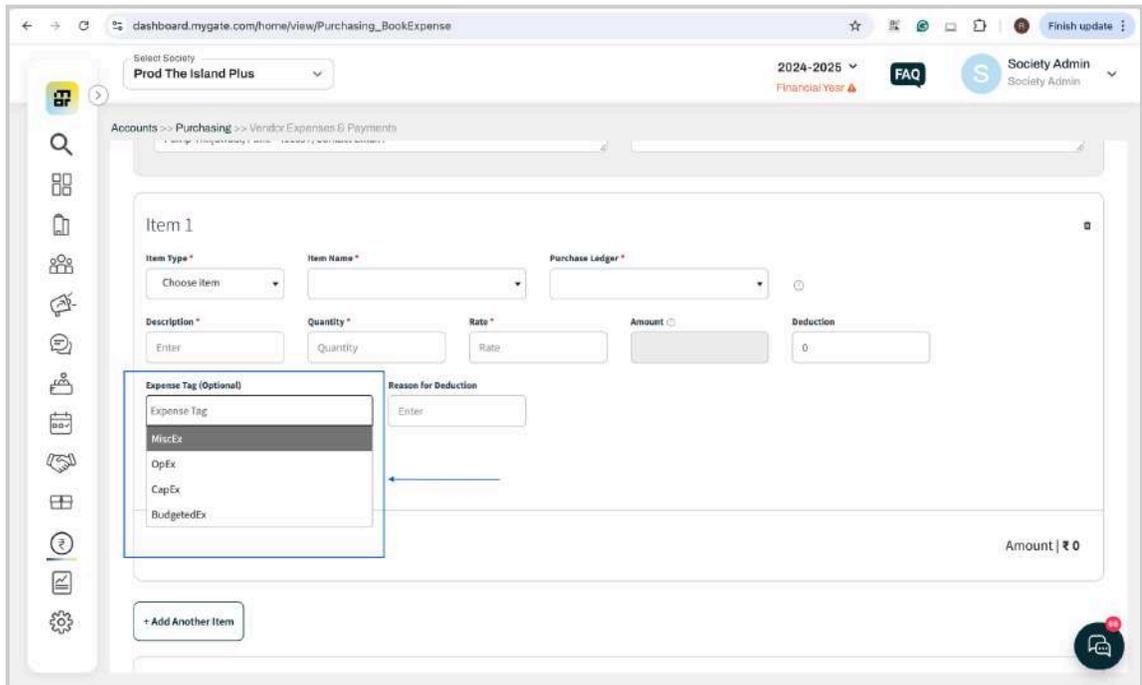
2. Society admins and managers have the option to assign the expense tag(s) while recording a PR, PO, vendor bill or petty expense (general payments) –
 - a. Each item in the above transactions can be booked with different expense tags
 - b. Adding an expense tag is optional by default. It can be made mandatory by raising a request to ERP MIS team.

Path: Accounts >> Purchasing >> Purchases



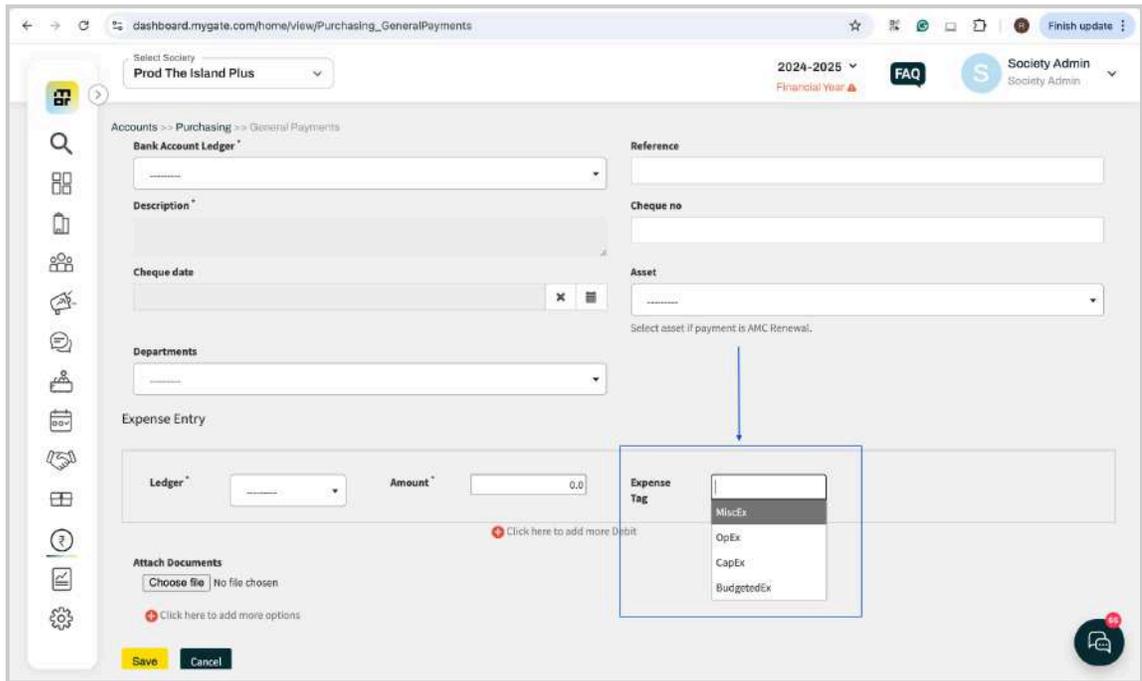
Recording and tagging a PR/PO

Path: Accounts >> Purchasing >> Vendor Expenses & Payments



Recording and tagging a book expense

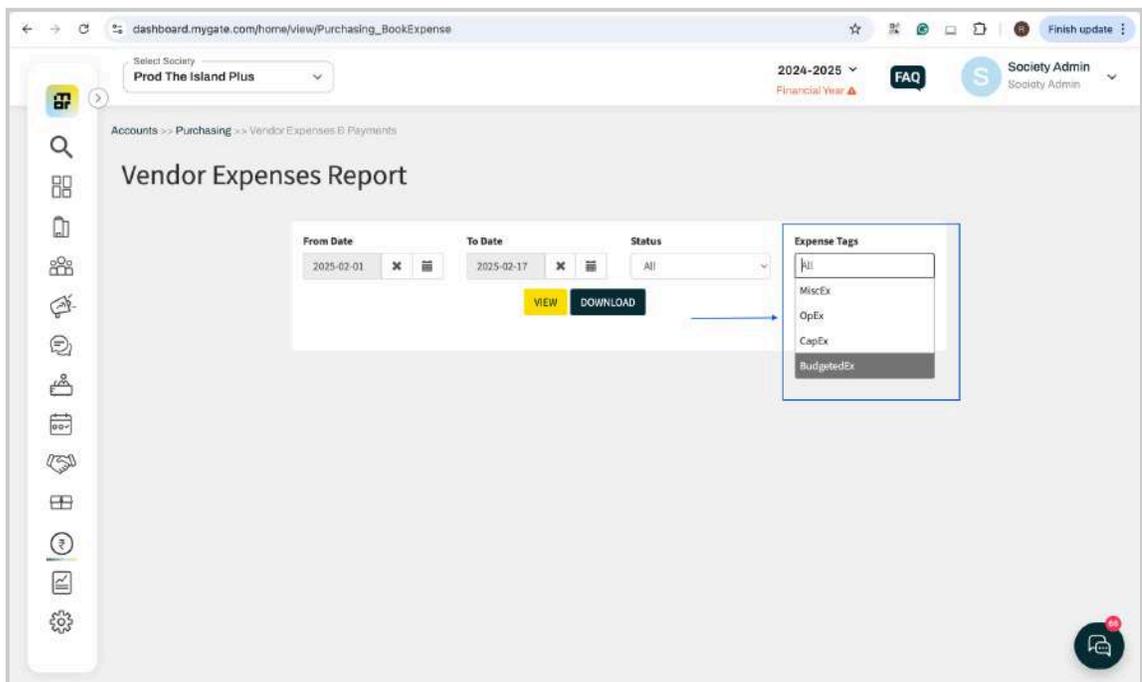
Path: Accounts >> Purchasing >> General Payments

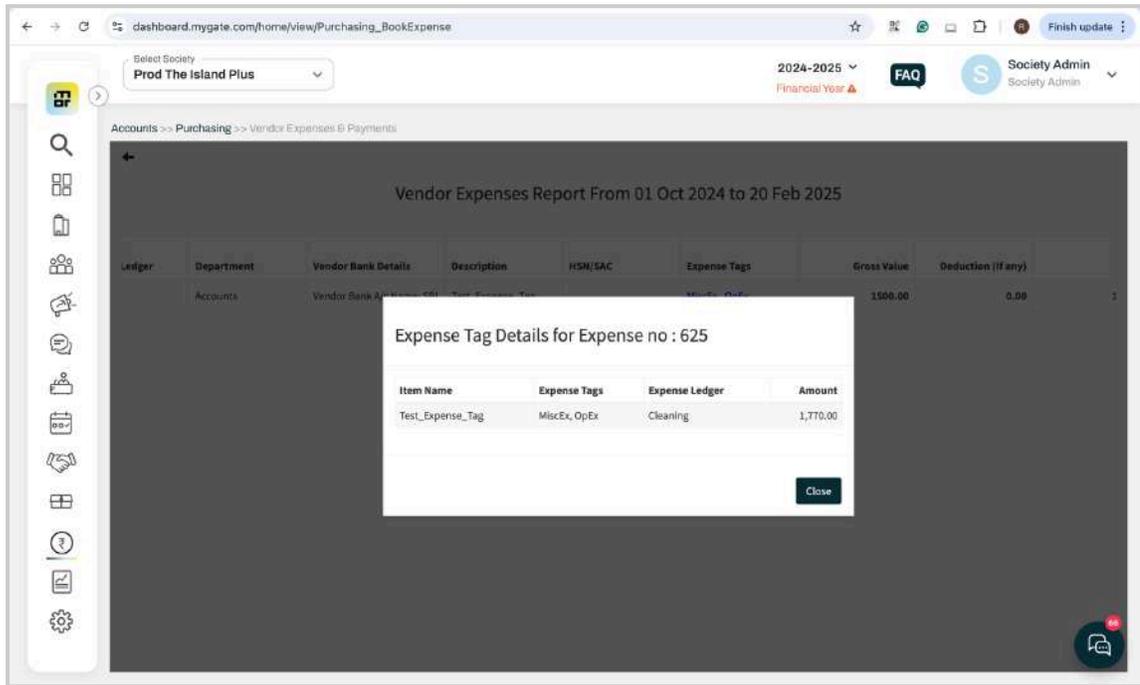


Recording and tagging a petty expense

3. Society admins and managers will be able to select an expense tag to generate and download a detailed report of all individual expenses made within that category during the selected period.

Path: Accounts >> Purchasing >> Vendor Expenses & Payments >> Vendor Expenses Report





Generating a vendor expenses report using an expense tag

Frontier - Prepaid Meter Integration

Another smart meter for electricity recharges has been integrated with Mygate, taking the total tally to 16 companies. Additional capabilities like live balance & reading, daily consumption on the app, low balance alert and recharge history are available on the resident app. Similarly, recharge logs, retry and reporting are key features available to admins on the dashboard.

Note - Frontier is integrated with 25+ meter companies on the other end. With this tie-up, we have opened up an opportunity to deploy our recharge product in many new societies.

The following details are required to onboard this meter -

- A. Society's Property ID (not to be shared with any 3rd party)
- B. Meter numbers and Meter IDs for each flat

Frontier Meter Setup

Bill Plan wise Overdues Defaulter Marking*

Path: Settings >> Maintenance & Account settings

Previously, society admins and managers could configure only a single defaulter amount for residents. For example, if the threshold was set at ₹5000, any resident with an overdue amount exceeding this value would be marked as a defaulter, restricting access to the helpdesk, amenity booking, prepaid recharge and elections.

With this update, defaulter amount configuration can now be set per bill plan. Admins can define up to three bill plans with specific overdue thresholds. For example:

- Overall defaulter amount: ₹5000
- Maintenance bill plan threshold: ₹2000
- Water bill plan threshold: ₹500

A resident will now be marked as a defaulter if their total overdue exceeds ₹5000 or if their dues within a specific bill plan exceed the configured threshold. This provides greater flexibility in managing defaulters based on different billing heads.

**Configuration setting only available to Central CS access*

ERP Suspended

Mark Defaulters

Total Overdues Amount Limit

Bill plan 1 Plan 1 Overdue Amount Limit
 Maintenance

Bill plan 2 Plan 2 Overdue Amount Limit
 Club

Bill plan 3 Plan 3 Overdue Amount Limit
 Lift

Dues Statement Message
 Styles - Format - B I U S
 p1 123

Dues Receipt Message
 Styles - Format - B I U S
 p1

Bill Message
 Styles - Format - B I U S
 p1

Warning Message For Dues
 Styles - Format - B I U S

Settings to configure the bill plan wise defaulter amounts

Amenity Booking setup updates for a better experience

Path: Amenities >> Settings

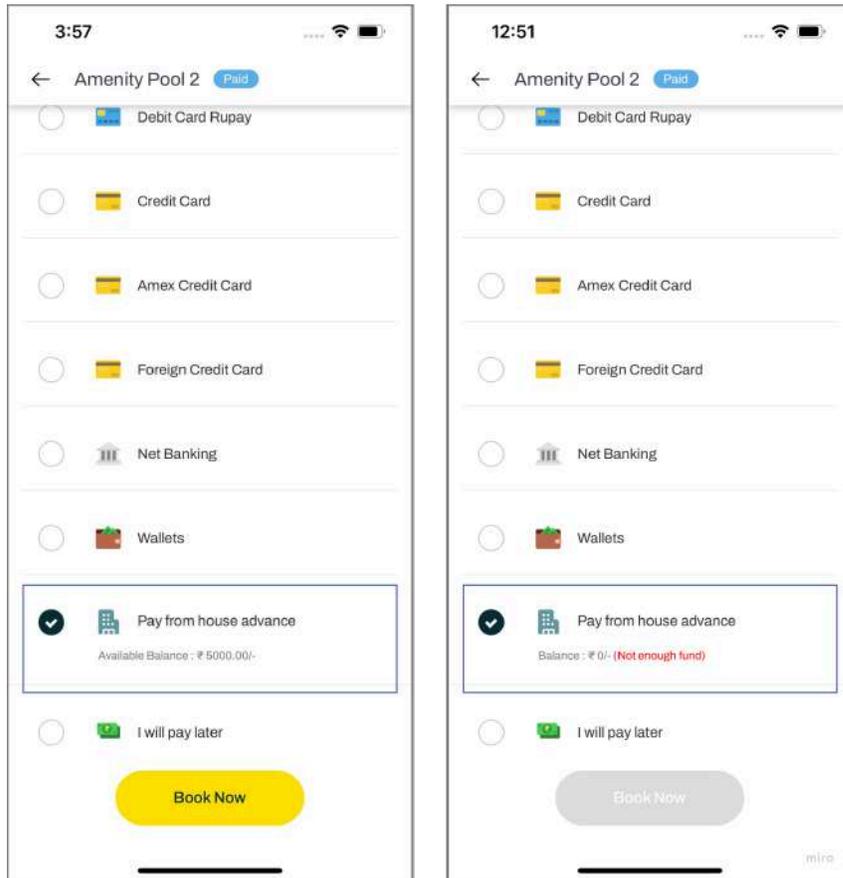
With growing demand from cities and societies migrating from other platforms, the Amenity Booking setup has been updated to provide a smoother and more intuitive experience. These enhancements aim to simplify the booking process and cater to the evolving needs of users, ensuring a seamless transition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

1. Amenity Booking Payment via House Advance*

This is a setting-based feature, which can be enabled from the backend to provide residents with an additional payment option for paid amenities.

When this setting is activated, residents can use their house advance balance to pay for amenity bookings. However, the balance must be sufficient to cover the full payment, as partial payments using a combination of house advance and other payment methods are not allowed.

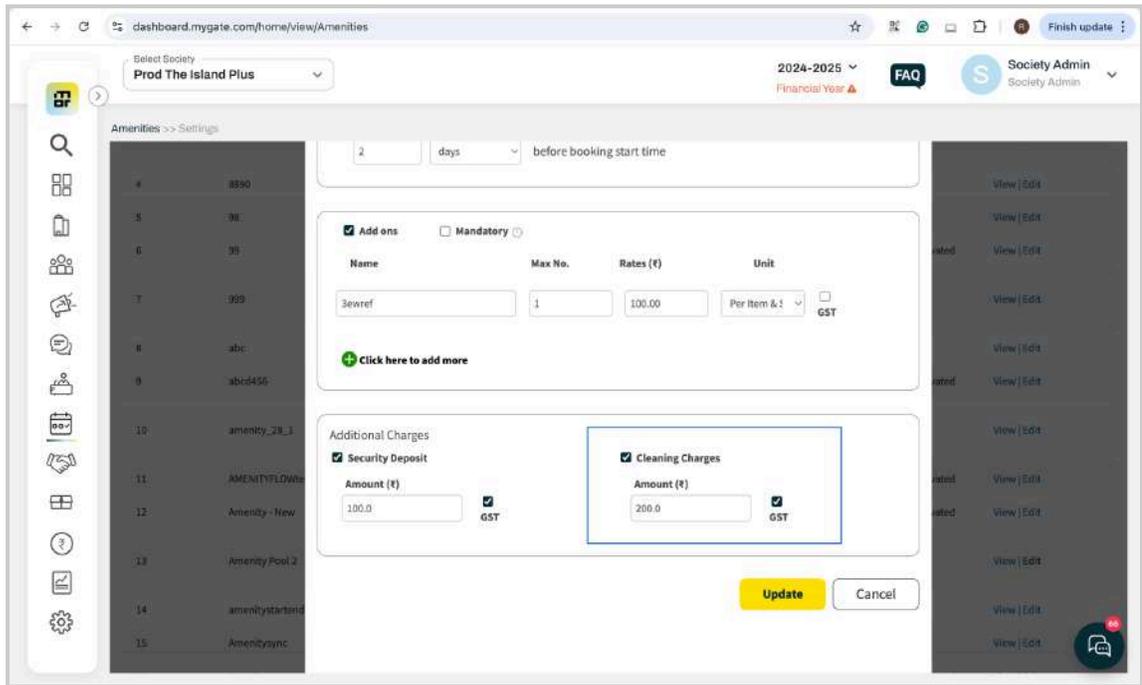
**Setting only available to ERP MIS access*



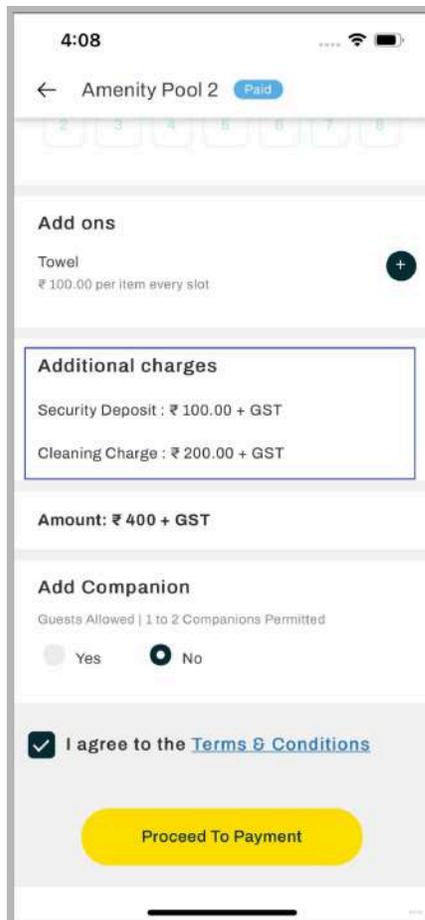
'Pay from House Advance' payment mode on the app

2. Addition of Cleaning Charges while booking an Amenity

Facility Managers and Society Admins can now enable cleaning charges for paid amenities like party/banquet halls, making it mandatory for residents to pay while booking.



Setting can be enabled for an amenity with the amount configurable



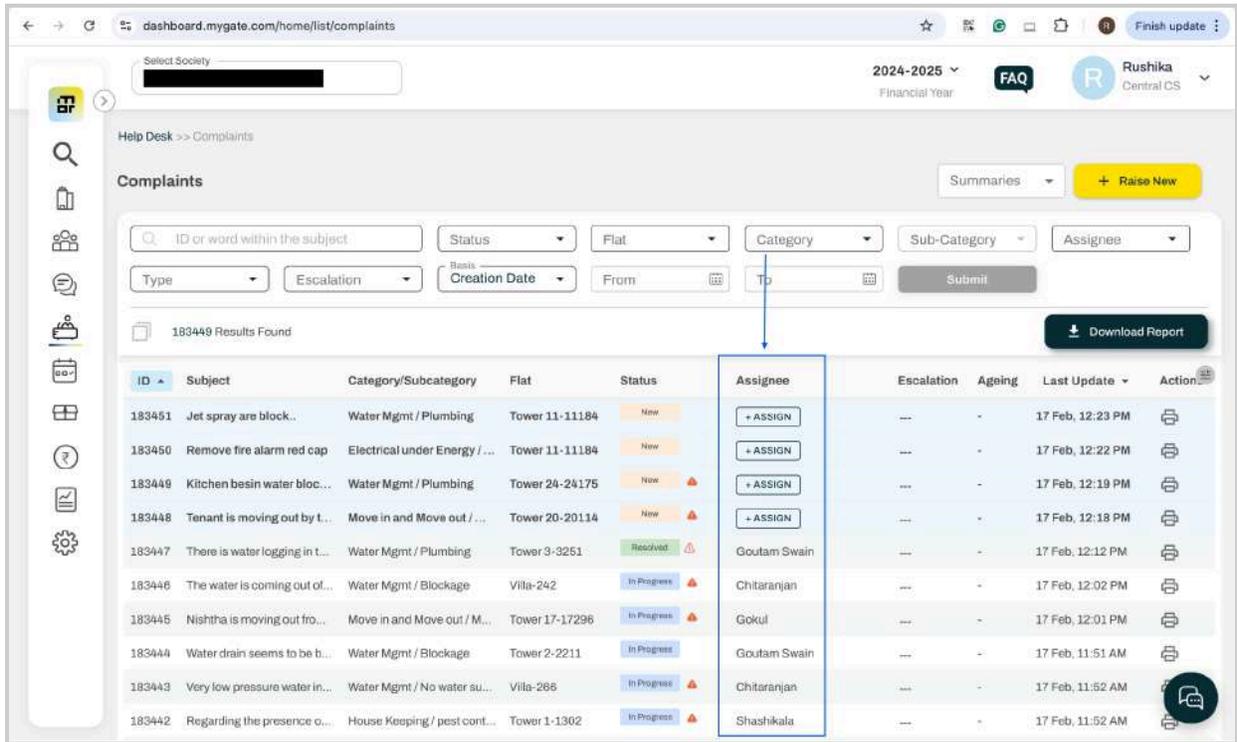
Cleaning Charges gets added mandatorily while booking

Helpdesk – ‘Assign’ button now available on the Complaint Listing Page

Path: Helpdesk >> Complaints

Helpdesk managers and admins can now assign staff to a ticket directly from the listing page using the ‘Assign’ button. This enhancement eliminates the need to open each ticket’s details first; streamlining the process and saving time and effort.

By reducing unnecessary clicks and creating a more intuitive workflow, this update enables faster ticket assignments and improved efficiency in complaint management.



The screenshot displays the 'Complaints' listing page in a web application. The page includes a search bar, filters for Status, Flat, Category, Sub-Category, and Assignee, and a table of complaint records. A blue box highlights the '+ ASSIGN' button in the 'Assignee' column of the table. A blue arrow points from the 'Assignee' filter dropdown to the highlighted button.

ID	Subject	Category/Subcategory	Flat	Status	Assignee	Escalation	Ageing	Last Update	Action
183451	Jet spray are block..	Water Mgmt / Plumbing	Tower 11-11184	New	+ ASSIGN	---	-	17 Feb, 12:23 PM	Print
183450	Remove fire alarm red cap	Electrical under Energy / ...	Tower 11-11184	New	+ ASSIGN	---	-	17 Feb, 12:22 PM	Print
183449	Kitchen basin water bloc...	Water Mgmt / Plumbing	Tower 24-24175	New	+ ASSIGN	---	-	17 Feb, 12:19 PM	Print
183448	Tenant is moving out by t...	Move in and Move out / ...	Tower 20-20114	New	+ ASSIGN	---	-	17 Feb, 12:18 PM	Print
183447	There is water logging in t...	Water Mgmt / Plumbing	Tower 3-3251	Resolved	Goutam Swain	---	-	17 Feb, 12:12 PM	Print
183446	The water is coming out of...	Water Mgmt / Blockage	Villa-242	In Progress	Chitaranjan	---	-	17 Feb, 12:02 PM	Print
183445	Nishtha is moving out fro...	Move in and Move out / M...	Tower 17-17296	In Progress	Gokul	---	-	17 Feb, 12:01 PM	Print
183444	Water drain seems to be b...	Water Mgmt / Blockage	Tower 2-2211	In Progress	Goutam Swain	---	-	17 Feb, 11:51 AM	Print
183443	Very low pressure water in...	Water Mgmt / No water su...	Villa-266	In Progress	Chitaranjan	---	-	17 Feb, 11:52 AM	Print
183442	Regarding the presence o...	House Keeping / pest cont...	Tower 1-1302	In Progress	Shashikala	---	-	17 Feb, 11:52 AM	Print

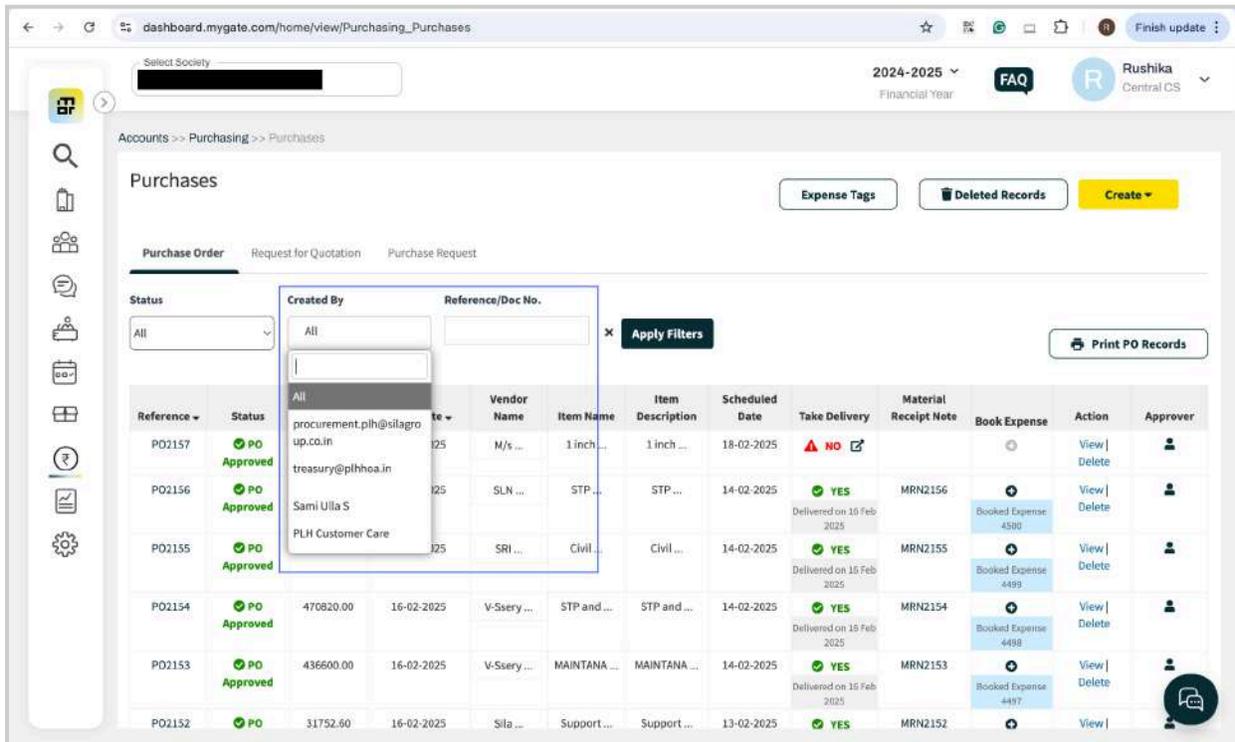
‘Assign’ button on the complaint listing page

PR/PO Search by Number or Creator

Path: Accounts >> Purchasing >> Purchases

Two new filters have been introduced in PR/PO to enhance searchability. Society admins and managers can now filter PR/POs based on:

- Created By: Filter by the user who created the PR/PO.
- Reference: Filter by reference no. of the PR/PO



Created by and reference no. filter in PR/PO

Prevent payment to 'Default Advance' from the user app

Path: Accounts >> Invoicing >> Raise Invoices >> Multiple Advance

This settings-based feature allows admins to control payments to the Default Advance on the app. When the setting is disabled, residents in the society will no longer see the Default Advance as an option on the 'Make Payment-Pay Advance' page. This helps prevent accidental payments and reduces unintended user actions.

Controlling the above flow is super helpful to accountants in societies that are live with bill plans and expect payments only in plan-linked advances.

dashboard.mygate.com/home/view/Invoicing_MemberInvoices

Select Society
Prod The Island Plus

2024-2025
Financial Year

FAQ

Society Admin
Society Admin

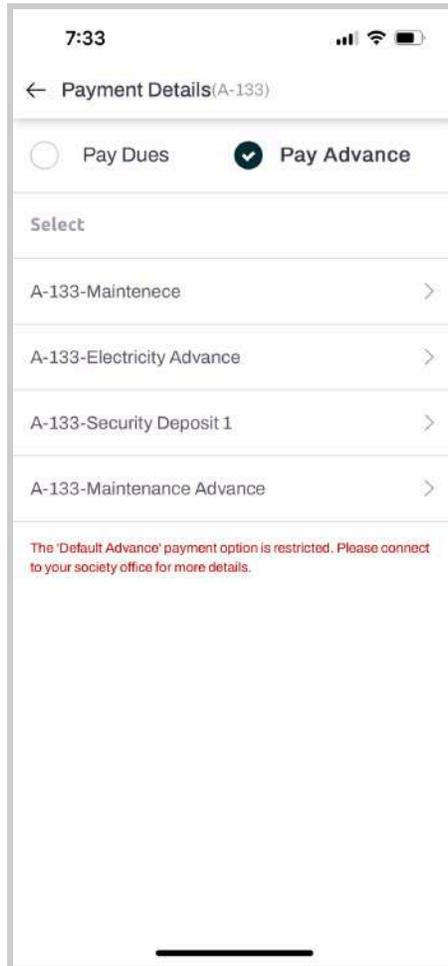
Accounts >> Invoicing >> Raise Invoices

Advance Ledgers

Ledger Name	Total Balance	Bank Account Ledger	Status	Actions
Advance	209899846.57	Bank	Enabled*	<input checked="" type="checkbox"/>
Water Advance	16182.29	BOB	Published	Delete Edit
Electricity Advance	243707.98	ICICI Share	Published	Delete Edit
Utility	1875.24	IDFC	Unpublished	Delete Edit
Security Deposit 2	1801	IDFC	Unpublished	Delete Edit
Security Deposit 1	10000	New BRS	Published	Delete Edit
Club Advance	6810.01	ICICI Share	Unpublished	Delete Edit
Maintenance Advance	9680.7	New BRS	Published	Delete Edit
Lifts_ Advance	2221.59	ICICI Share	Unpublished	Delete Edit
hospital_edit	450	ICICI Share	Unpublished	Delete Edit

*Notes: The Default Advance payment option will be available for the residents.

Setting to enable/disable default advance payment option for residents

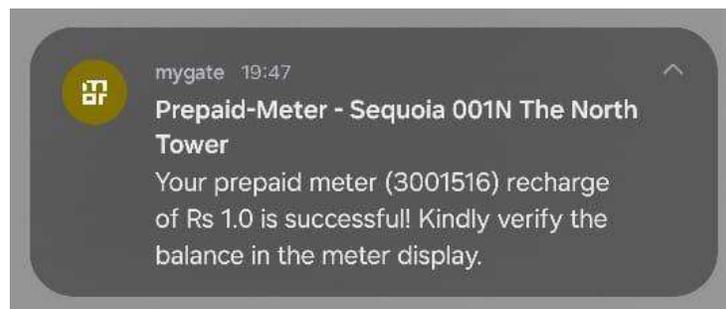


Default Advance payment option disabled in resident app

INTERNAL - SMS Notifications for Prepaid Meters have been discontinued

Prepaid meter related SMS notifications such as recharge success, recharge failure and low balance alert have been replaced with app based push notifications. This has helped with providing better information to residents about their recharge status as well as redirect them to the payment details page.

Note - Residents will continue to receive these updates via email like before.



Sample recharge notification sent by the Mygate app

Additional Updates

1. The Helpdesk SLA Summary now excludes on-hold time of a ticket (if any) from its calculations. All summary fields are adjusted to ensure more accurate tracking by considering only active resolution time.
2. Opinion poll results on the resident app will now display vote percentages with precision up to two decimal places, ensuring more accurate representation.

Security Dashboard Updates (Jan' 2025)

Enhancements to the Move-IN configurations

a. Checklist for society admins before approving a new Move-IN

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

The society admins would need to mark certain checklist while approving a move-in request from the resident. Now, these checklist can be configured by the admins themselves and mark them as per the application received from the residents.

Select Society
The North Tower

2023-2024
Financial Year

FAQ

Anlin
Society Admin

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

Move in configure

Move In Move Out

Resident Information Documents Payments Checklist Move-in Rules

Checklist	Owner	Tenant	Multi-Tenant
<input checked="" type="checkbox"/> FLAT key	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add new

Save & Next

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

Move in configure

Move In Move Out

Resident Information Documents Payments Checklist Move-in Rules

Multi-Tenant

Save & Next

New Checklist

Checklist Name*

Add Close

Go to the Checklist tab and Click on 'Add New' to add checklist

The configured checklist will be visible to the admin when a move-in request is pending for approval

b. Additional information in the New-Move IN form for society admins

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

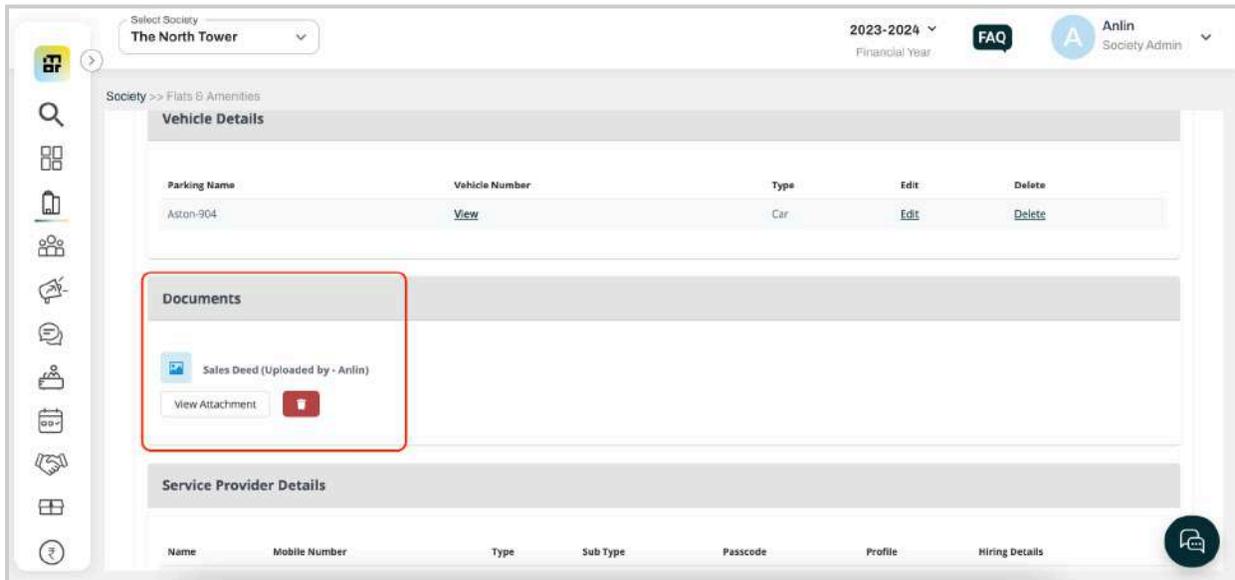
The admins will now be able to see the Nationality, Emergency contact, Pets and checklist fields in the new move-in form of the dashboard. This will help the admins to request for move-in on behalf of the resident.

The admins will be able to fill the highlighted information in the new move in form

Flat Document delete option for admins in the flat list

Path: Society >> Flats & Amenities >> Click on the flat name >> Scroll down to the document section

The flat documents uploaded while the user registers are shown in the flat section of the user for the admins. The society admins would need an option to delete these flat documents if not required anymore. The admins can now delete the flat documents from the dashboard. This access is only available with the society admins.

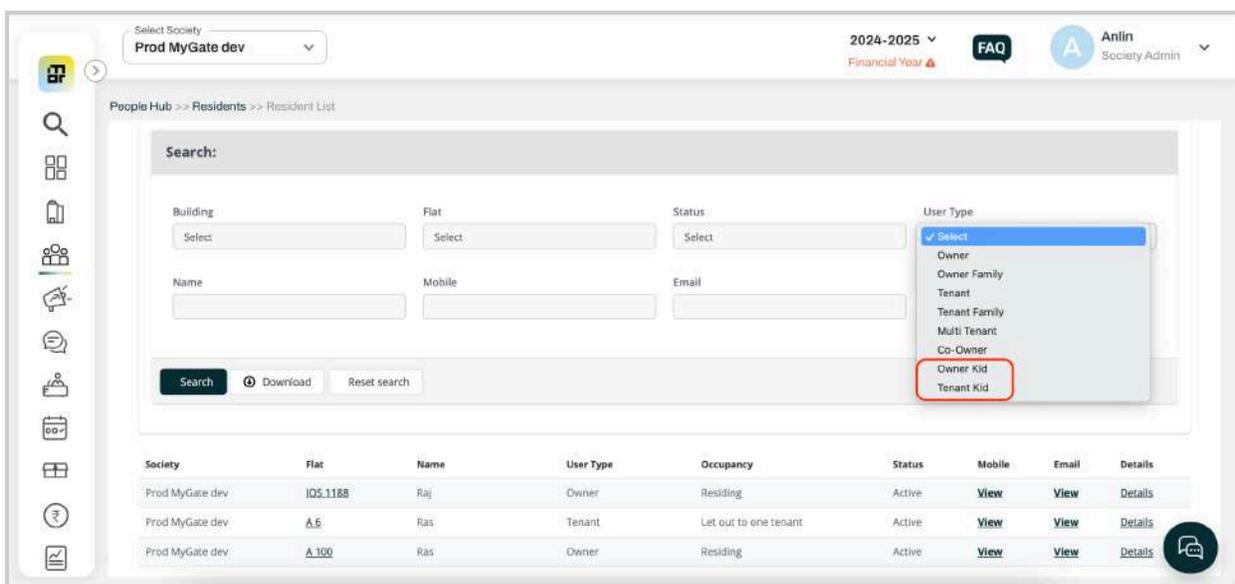


The admins can click on the delete icon for deletion of flat documents

Filter for Kids in the resident list

Path: People Hub >> Residents >> Click on the filter 'User Type'

The kids' profile are now visible in the flat section as per the changes we released recently. We will now have the kids' profile visible in the resident list as well and can be fetched by applying Owner Kid or Tenant Kid filter in the user type. The default listing of residents will not show the kids' details but would need to be fetched separately. This data can also be downloaded from the dashboard.



Filter to fetch the kids' profiles in the resident list

Additional Updates

1. Optimisation of Manage Users page
2. Allow only numerals to be added for the device details.
3. Added 2 more options(Notification without Retry, IVR without Retry) for verification mode.
4. Addition of type 'VAULT' in the dropdown of Monitoring hardware device
5. Homes unsupported society image format fix
6. MIMO bug fixes

Resident app Updates (Jan' 2025)

Party/ Group Invite

(Released in January)

Planning events just got easier with our enhanced Party/Group Invite feature! Effortlessly invite and manage guests all within the MyGate app.

Key Enhancements:

- **Quick & Easy Invitations** – Invite guests by sharing a **single invite link** with all of them, eliminating the hassle of manual additions of guests on the mygate app.
- **Guest Limit & Controls** – Set guest limits, track entries, and receive notifications for each entry.
- **Real-Time Management** – Edit event details, increase guest limits, or cancel invites instantly.
- **Enhanced Security** – Guests generate their **own passcodes** via the invite link while ensuring smooth check-ins.
- **Seamless Access** – Easily track event details via the activity feed & visitor carousel.

