

Society Dashboard Updates (Nov' 2024)

Simplified Invoice Generation Flow

Path : Dashboard >> Accounts >> Invoicing >> Raise Invoices >> Use this template

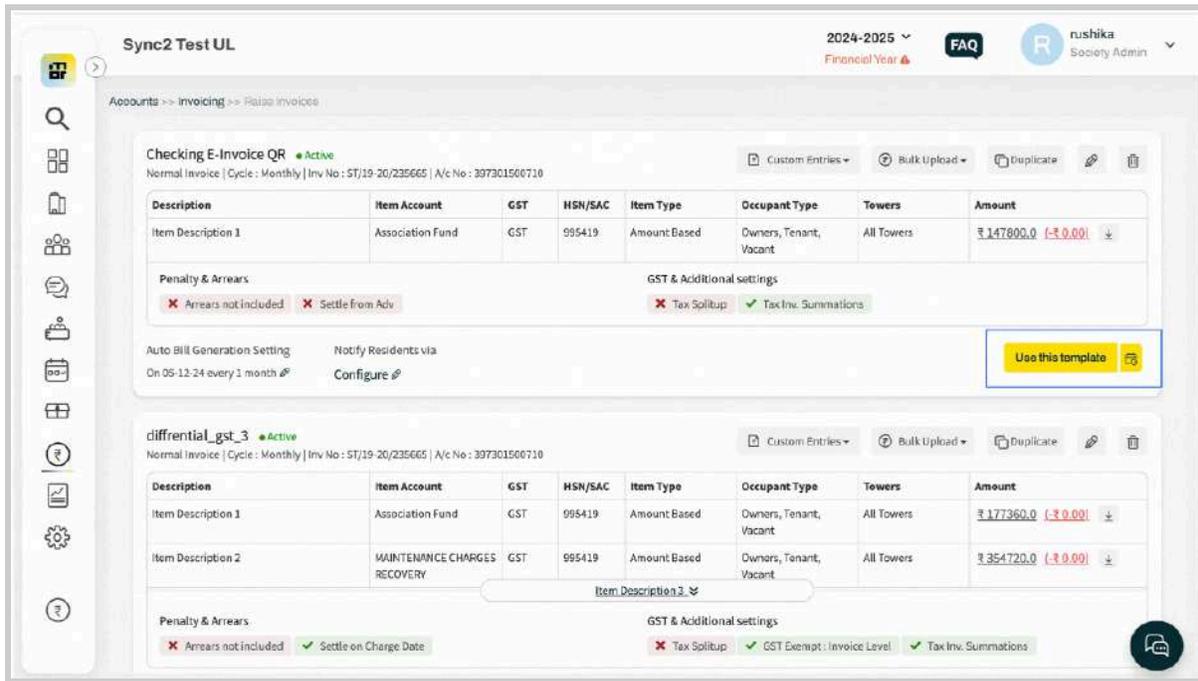
Generation of invoices is key to collection of the required funds in any society. Mygate has provided this flow since 2018 through a template based billing system. The existing model has gone through a series of improvements every year since its launch. The introduction of revamped template listing, new template form, e-invoicing, choice of generation method, etc. to name a few. However, the whole process from the lens of a user's billing journey still appeared to be disconnected.

The new milestone based approach for accountants and admins offers a self-guided experience, reducing the need for extensive training and support intervention. This provides the following benefits :

1. Links template creation with invoice generation, enabling users to experience the two flows as a unified journey.
2. Simplifies existing features like -
 - a. Selection of previous invoice batches in the Mumbai penalty system
 - b. Easy setup of amounts/rates for all houses through upload or Quick Fill features
3. Optimizes the "Edit Amount" page to streamline and accelerate accountant workflows.

Admins/accountants now go through the following 4 steps to generate society invoices -

1. **Confirm Template** - Check the existing configurations of the template using a side by side preview of the invoice. The user can quickly choose to edit the template as well before continuing further.
2. **Date & Amount Input** - All the data input for invoicing can be done at this step. With features such as Quick Fill, Excel upload and house filters, it becomes super easy to manage a large number of houses.
3. **Invoice Preview** - Check the side by side preview of the invoices going to be generated in a house-wise manner. Actual amounts of items and penalty are also filled in for a clear calculation.
4. **Generate & Publish** - Verify the final billing configurations along with a summary of amounts set for different items. Choose to publish right away after generation or later depending on your comfort.



Simplified Invoice Generation Flow

[Tutorial Video](#)

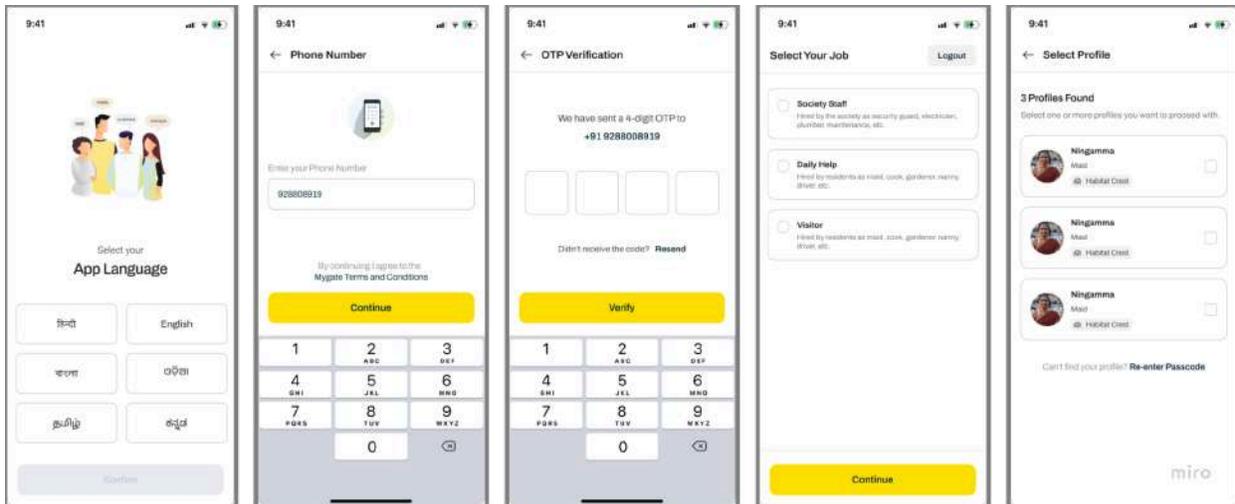
Saarthi App revamp to new colour scheme

The Saarthi app has been fully revamped to follow the updated colour scheme of the Mygate ecosystem. Along with this UI level change, the structure has also been improved to accommodate new types of users on the platform..

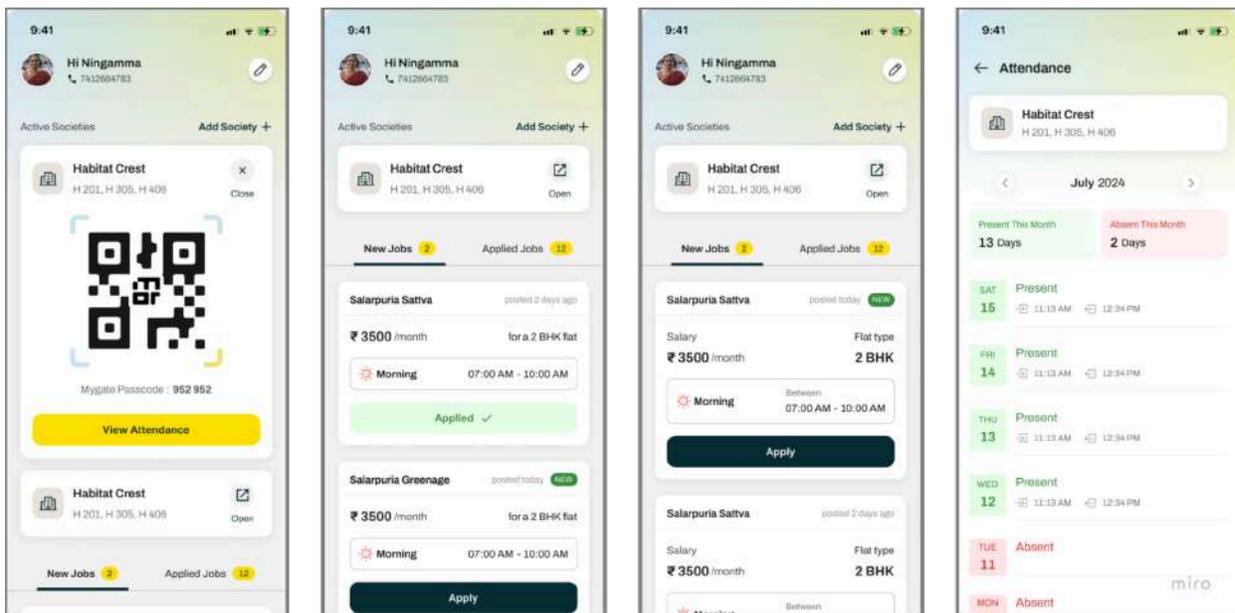
While the earlier version focused solely on supporting “Daily Help” within societies, the updated app introduces a new onboarding flow and is designed to benefit all blue-collar workers in the community, including technicians, plumbers, electricians, and daily help.

The primary aim of this update is to address the core challenges faced by these workers -

1. For daily help, the Saarthi app offers a platform to discover new job opportunities within the society and apply directly, providing all relevant details to aid in informed decision-making.
2. With the new Helpdesk integration, the app introduces a refreshed interface for Helpdesk staff, ensuring a more efficient and streamlined complaint resolution process. This update reinforces the Saarthi app's role as a comprehensive tool for the betterment of both workers and the community. (explained in another section below)



On-boarding flow of the revamped Saarthi App



Revamped Saarthi App for Daily Help

Saarthi App X Helpdesk Integration

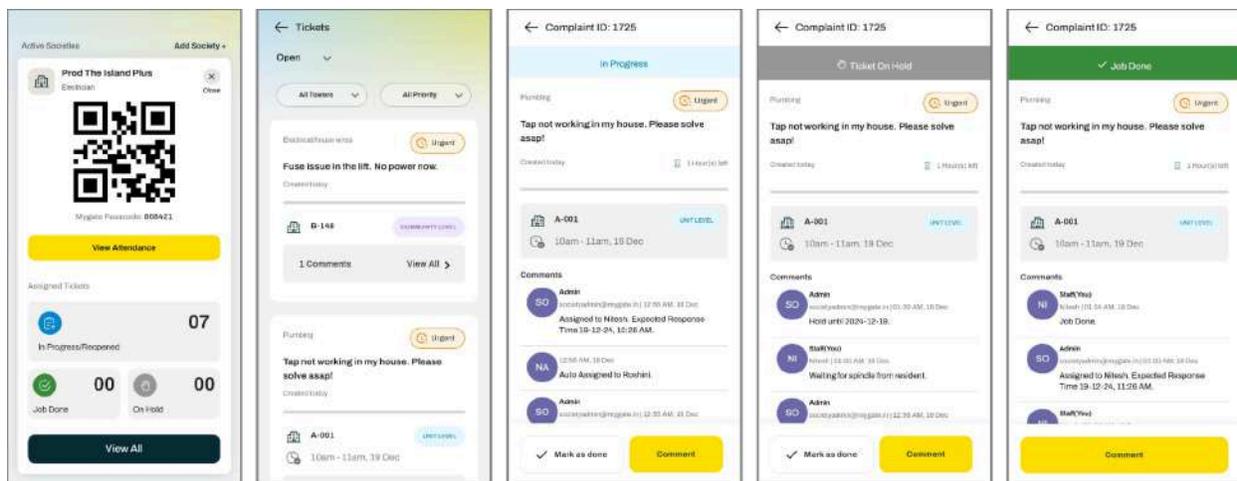
The Saarthi app has also been enhanced with a dedicated interface for Helpdesk staff. This integration aims to provide an efficient and streamlined system for resolving assigned tickets and tasks.

Key features introduced with this new interface include:

1. **Complaint Overview Widget:** Counts of Open, Job Done and On Hold tickets are displayed on the app's home page itself helping the staff be aware about new assignments and status updates.

2. **Complaint Listing Page:** Displays all assigned tickets with essential details such as Subject, Unit Number, and Priority, and filters (Status, Towers & Priority) ensuring better organization and accessibility.
3. **Complaint Detail Page:** Provides comprehensive information on each ticket, including attachments and comments made by both the admin and residents.
4. **New User Actions:** Introduces a "Mark as Done" button, allowing staff to close tickets once resolved.
5. **Enhanced Communication:** Enables staff to add comments and upload attachments to tickets as needed. These updates are visible to both the admin/helpdesk manager and the resident, fostering transparent communication.

This update reinforces the Saarthi app's role as a powerful tool for Helpdesk staff, enhancing their ability to manage and resolve complaints effectively.



Saarthi App for Helpdesk Staff

[Helpdesk on Saarthi \(FAQs\)](#)

New Prepaid Meters Integrated

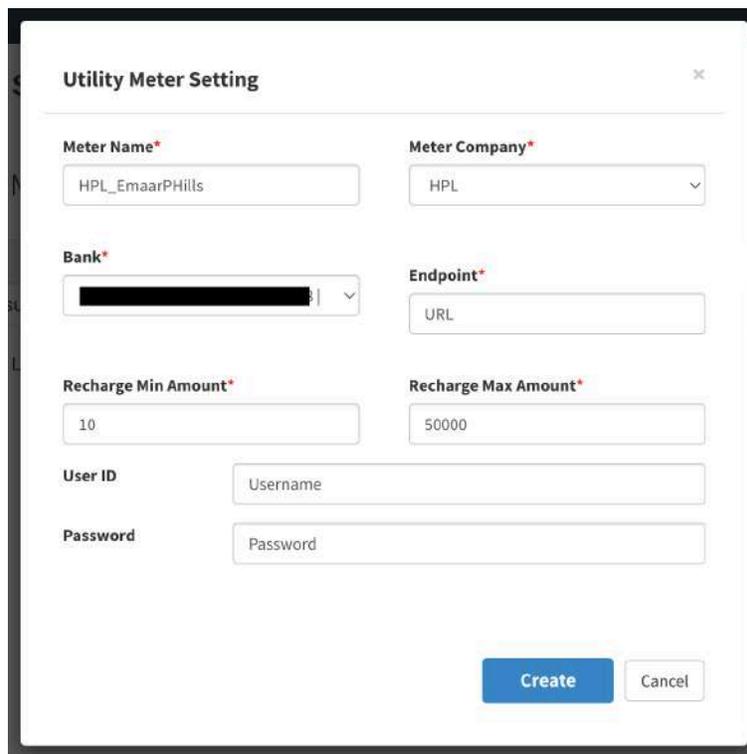
1. HPL Meter - (NCR)

Another popular meter from North India/NCR is now integrated with the Mygate system.

Similar to Secure, this is a non-smart meter that works on a token generation based recharge. Post making the recharge payment through the app, a resident would receive a 21-digit passcode from HPL that he would need to punch into the meter's display.

The following details are required to onboard the meter -

- A. Society's URL, Username and Password (these details are not to be shared with any 3rd party)
- B. Meter numbers and Customer IDs for each flat



The screenshot shows a 'Utility Meter Setting' dialog box with the following fields:

- Meter Name***: Text input field containing 'HPL_EmaarPHills'.
- Meter Company***: Dropdown menu with 'HPL' selected.
- Bank***: Dropdown menu with a redacted value.
- Endpoint***: Text input field containing 'URL'.
- Recharge Min Amount***: Text input field containing '10'.
- Recharge Max Amount***: Text input field containing '50000'.
- User ID**: Text input field containing 'Username'.
- Password**: Text input field containing 'Password'.

At the bottom right, there are two buttons: 'Create' (highlighted in blue) and 'Cancel'.

HPL Meter Setup

Note -

- 1. HPL meter only allows recharge in steps of Rs 10/- (Any other amount would be rejected)
- 2. Since HPL is a non-smart meter, we cannot fetch reading and balance information

Pet Management - Report Download

Path: People Hub >> Pets >> Download Report

Admins can now download the details of the pets added in the society from the dashboard. The downloaded report will have all the required information like name, type, vaccination details, vaccination validity, etc.

The screenshot shows a web dashboard for 'PETS LIST'. At the top, there's a 'Select Society' dropdown set to 'Prod MyGate dev' and a 'Financial Year' dropdown set to '2024-2025'. A 'Download Report' button is highlighted in a red box. Below the filters, a table lists 175 results. The table columns are: Flat, Name, Pet Type, Breed, Vaccination Status, and Vaccination Due Date. The table contains 10 rows of pet data.

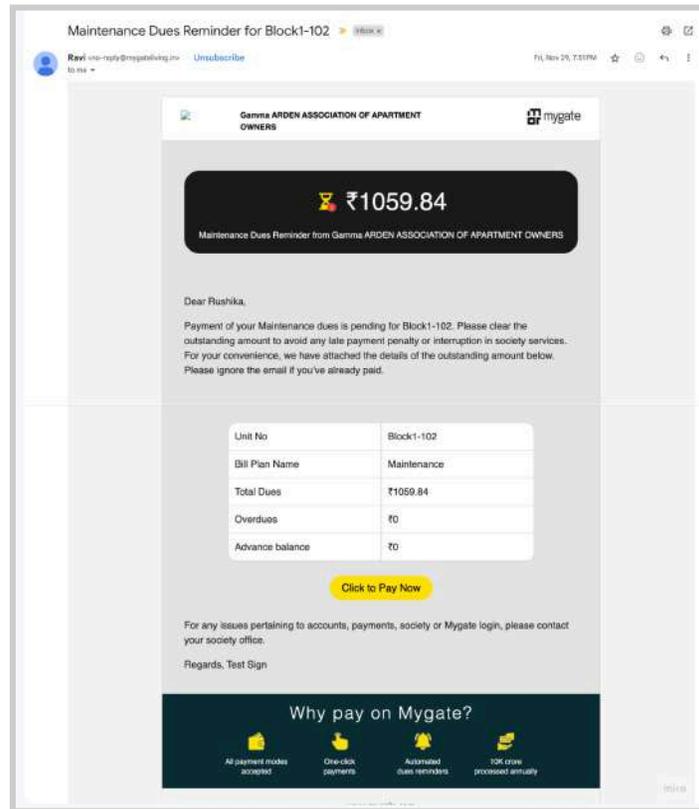
Flat	Name	Pet Type	Breed	Vaccination Status	Vaccination Due Date
A-102	Moriya	Bird	Peacock	NOT TAKEN	-----
B-101	rete	Cat	Persian	COMPLETELY	23-12-2024
B-101	test	Dog	German Shepherd	COMPLETELY	23-12-2024
B-102	parro	Bird	Cockatiel	COMPLETELY	27-8-2024
B-102	cc	Dog	Labrador Retriever	COMPLETELY	29-8-2024
B-201	vv	Dog	Labrador Retriever	COMPLETELY	4-11-2024
B-201	vg	Cat	Indian	NOT TAKEN	-----
B-202	fjg	Cat	Persian	COMPLETELY	22-11-2024
A-009	test	Fish	Goldfish	COMPLETELY	20-12-2024

Name Box	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Building Name	Flat Name	Pet Name	Pet Type	Breed	Gender	Date of Birth	Age	Vaccinator	Vaccinator	Vaccinator	Vaccinator	Added By	Added On	Updated By	Updated On
2	A	A-102	Moriya	Bird	Peacock	Male	15-08-1990	34 years, 5	NOT TAKEN	-	-	-	Pragyas Vill	24-08-2023	Pragyas Vill	24-08-2023
3	B	B-101	rete	Cat	Persian	-	-	-	COMPLETE	23-12-2024	23-12-2024	-28 days	-	23-12-2024	-	23-12-2024
4	B	B-101	test	Dog	German Shi	-	-	-	COMPLETE	23-12-2024	23-12-2024	-28 days	-	23-12-2024	-	23-12-2024
5	B	B-102	parro	Bird	Cockatiel	-	-	-	COMPLETE	10-02-2024	27-08-2024	-146 days	-	10-02-2024	-	27-08-2024
6	B	B-102	cc	Dog	Labrador Ri	-	-	-	COMPLETE	07-06-2024	29-08-2024	-144 days	-	07-06-2024	-	27-08-2024
7	B	B-201	vv	Dog	Labrador Ri	-	-	-	COMPLETE	04-11-2024	04-11-2024	-77 days	Jagdeesh	04-11-2024	Jagdeesh	04-11-2024
8	B	B-201	vg	Cat	Indian	-	-	-	NOT TAKEN	-	-	-	Jagdeesh	04-11-2024	Jagdeesh	04-11-2024
9	B	B-202	fjg	Cat	Persian	-	-	-	COMPLETE	22-11-2024	22-11-2024	-59 days	Amit Gupta	22-11-2024	Amit Gupta	22-11-2024
10	A	A-009	test	Fish	Goldfish	-	-	-	COMPLETE	20-12-2024	20-12-2024	-31 days	AKS Qa test	20-12-2024	AKS Qa test	20-12-2024
11	H	H-1	test	Cat	-	Female	17-09-2023	1 years, 4 m	NOT TAKEN	-	-	-	-	24-08-2023	-	17-09-2023
12	H	H-3	c	Cat	Indian	Male	-	-	NOT TAKEN	-	-	-	Bryan	06-01-2025	Bryan	06-01-2025
13	H	H-4	Chethan di	Cat	Siamese	Male	01-11-2023	1 years, 2 m	PARTIALLY	02-11-2023	-	-	-	02-11-2023	-	02-11-2023
14	NCR	NCR-202	dog	Dog	German Shi	-	-	-	COMPLETE	04-11-2024	04-11-2024	-77 days	Sai Teja Bol	04-11-2024	Sai Teja Bol	04-11-2024
15	B	B-Santhosh lab	dog	Dog	Labrador Ri	-	-	-	NOT TAKEN	-	-	-	-	16-05-2024	-	16-05-2024
16	B	B-Santhosh v gy g	bird	Bird	Cockatiel	-	-	-	NOT TAKEN	-	-	-	-	16-05-2024	-	16-05-2024
17	B	B-Santhosh hwh	cat	Cat	Siamese	-	-	-	COMPLETE	29-07-2024	29-07-2024	-175 days	-	29-07-2024	-	29-07-2024
18	Delhi-NCR	Delhi-NCR- tom	dog	Dog	Golden Ret	-	-	-	COMPLETE	17-09-2024	17-09-2024	-125 days	-	17-09-2024	-	17-09-2024
19	Pune	Pune-102	dhdhd	test	-	-	-	-	NOT TAKEN	-	-	-	Test	17-09-2023	Test	17-09-2023
20	Pune	Pune-105	test	Hamsters	-	-	-	-	COMPLETE	20-12-2024	20-12-2024	-31 days	Farha	20-12-2024	Farha	20-12-2024
21	Pune	Pune-105	manju	Cat	Siamese	-	-	-	COMPLETE	20-12-2024	20-12-2024	-31 days	Farha	20-12-2024	Farha	20-12-2024
22	Pune	Pune-105	j	Dog	Golden Ret	-	-	-	COMPLETE	20-12-2024	20-12-2024	-31 days	Farha	20-12-2024	Farha	20-12-2024

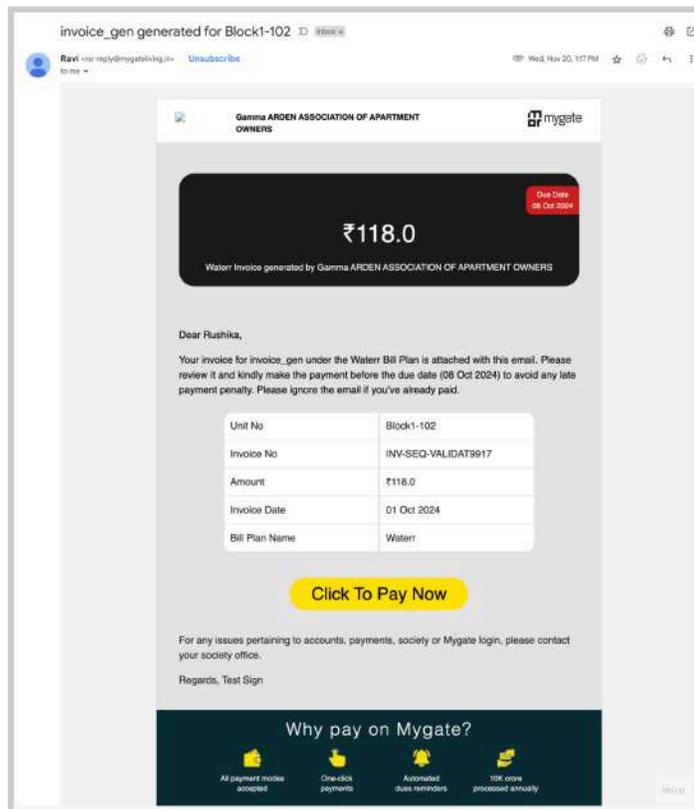
New Email Templates - Invoice, Dues & Receipts

Raising invoices to the residents and timely collection of funds is essential to maintaining the monthly operations of any society. We understand that communicating house related accounting information to residents, in a way that is readily consumable, can help with the above.

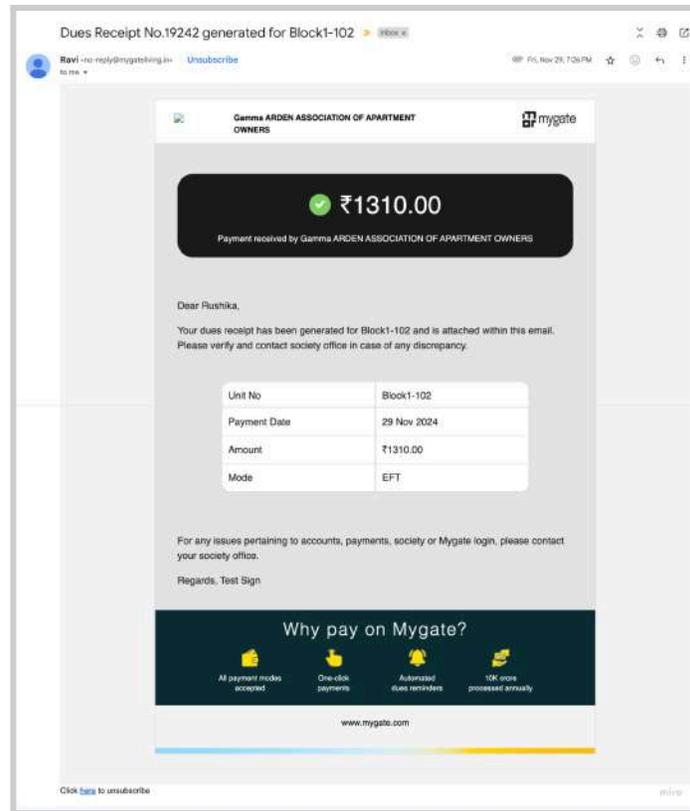
4 key emails have been identified - invoices, receipts, reminders and overdue notice. While overdue notice email was already released back in September, we have now released the new templates for Invoice, Dues & Receipts.



Dues Reminder Email Template



Invoice Email Template



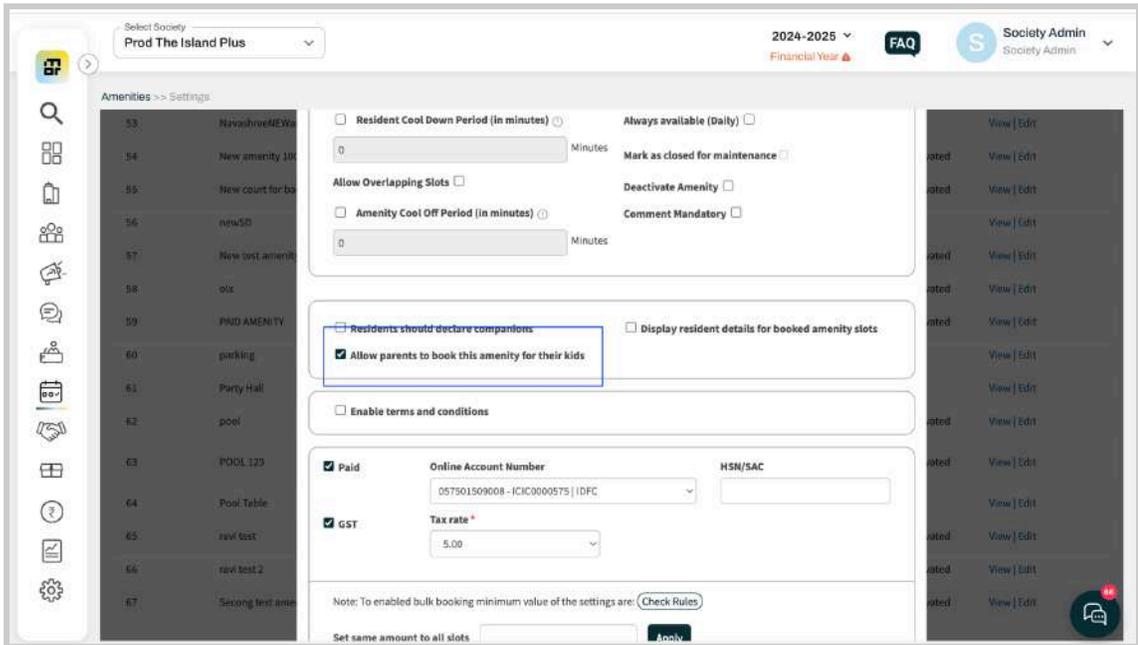
Dues Receipt Email Template

Amenity Booking setup updates for better experience

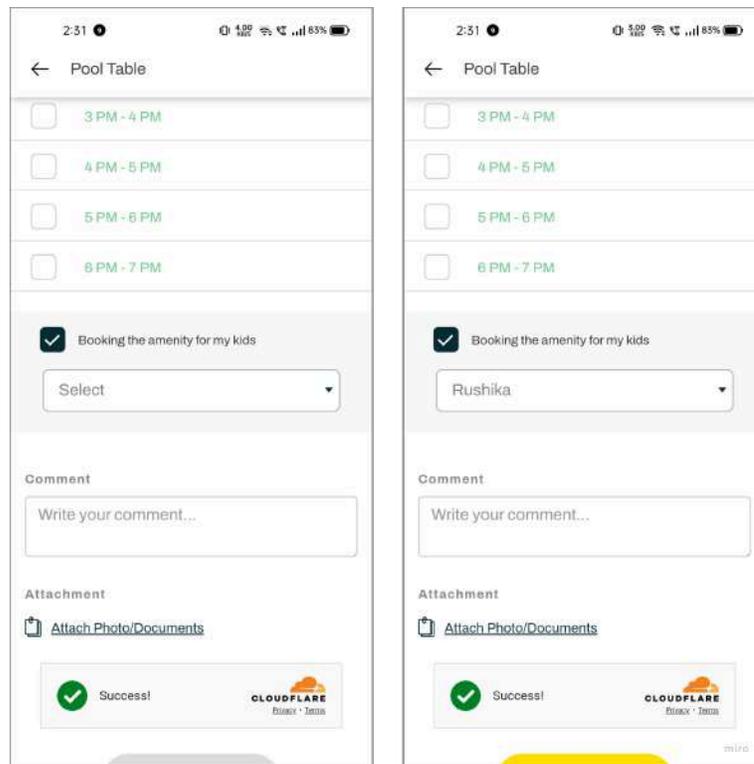
With growing demand from cities and societies migrating from other platforms, the Amenity Booking setup has been updated to provide a smoother and more intuitive experience. These enhancements aim to simplify the booking process and cater to the evolving needs of users, ensuring a seamless transition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

1. Residents can book an amenity for their kids

Parents can now book amenities for their children through the app. Once the booking is confirmed, children can access the amenity using their unique passcode for entry. This is an amenity level configuration.



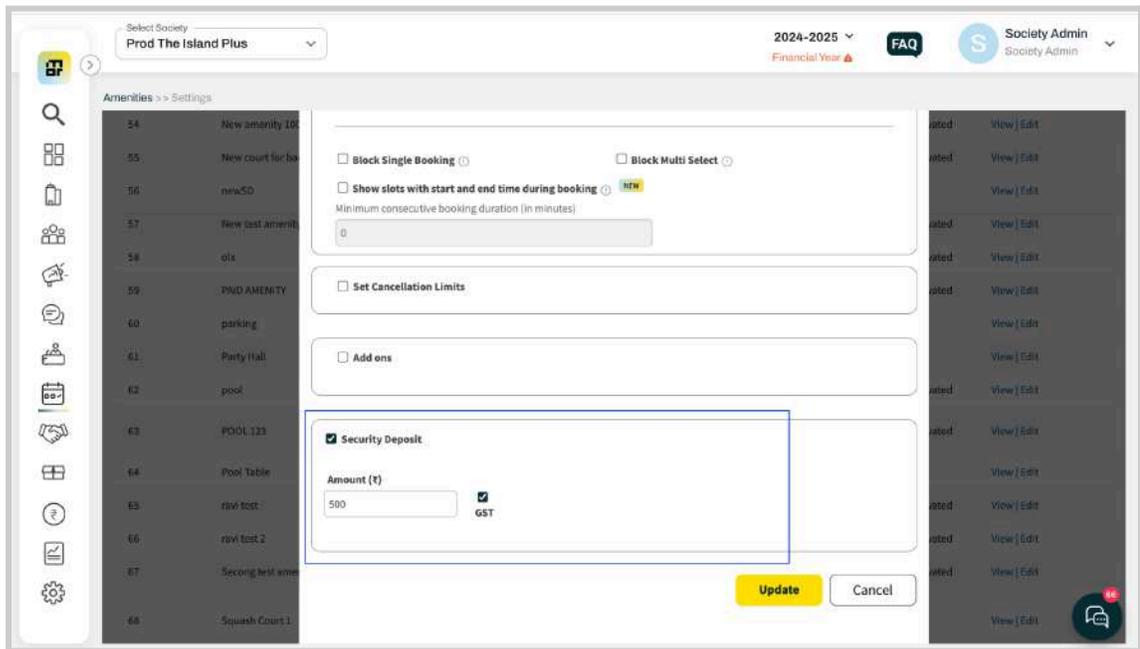
Setting can be enabled for an amenity



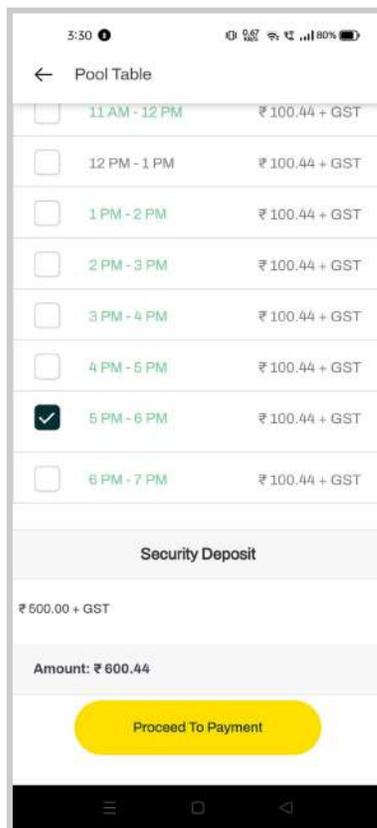
Booking for kids flow on the app

2. Addition of Security Deposit while booking an Amenity

Facility Managers and Society Admins can now enable a security deposit for paid amenities, making it mandatory for residents to pay while booking.



Setting can be enabled for an amenity with the amount configurable



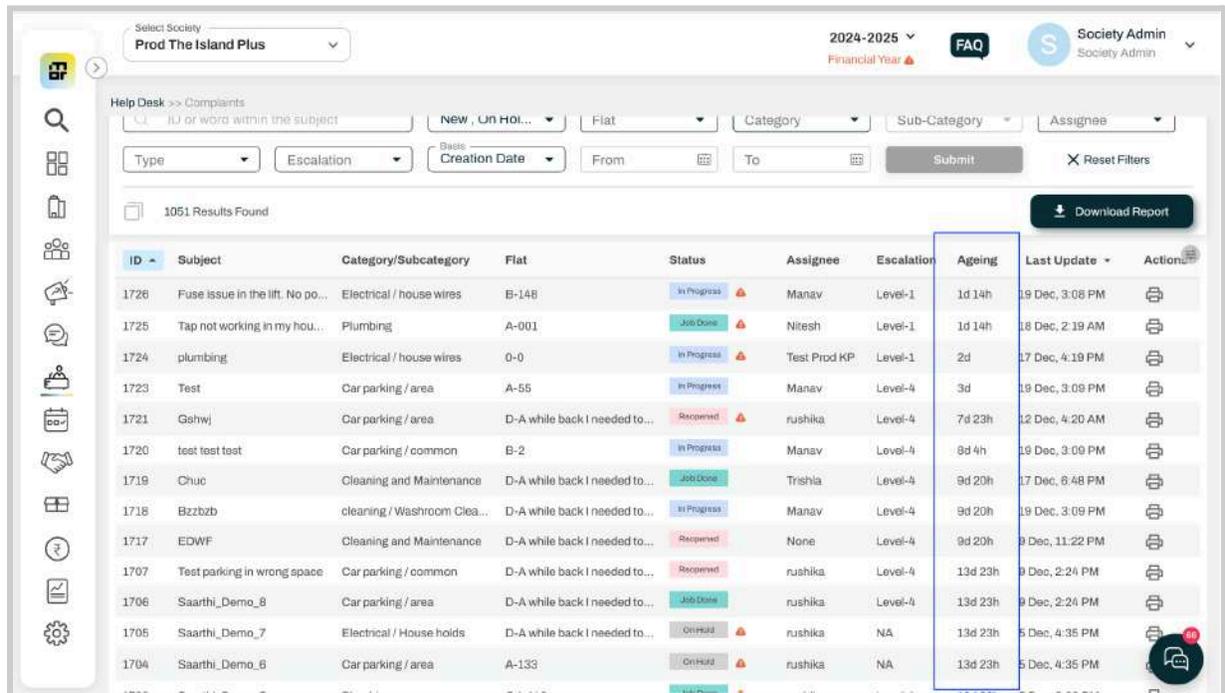
Security Deposit gets added mandatorily while booking

Helpdesk Dashboard setup updates for better experience

1. Ageing column in dashboard complaint listing

Path : Dashboard >> Helpdesk >> Complaints

An 'Ageing' column has been introduced on the Helpdesk listing page on the dashboard, providing a clear view of the time elapsed from ticket creation to its resolution. This addition aims to enhance transparency and efficiency in ticket management, enabling Helpdesk Managers and Society Admins to monitor the progress of tickets effectively



The screenshot displays the Helpdesk Dashboard interface. At the top, there's a navigation bar with 'Select Society' (Prod The Island Plus), '2024-2025 Financial Year', 'FAQ', and 'Society Admin'. Below this is a search and filter section with 'Help Desk >> Complaints' and various filters like 'New, On Hold', 'Flat', 'Category', 'Sub-Category', and 'Assignee'. A '1051 Results Found' message is shown above a table of complaints. The table has columns for ID, Subject, Category/Subcategory, Flat, Status, Assignee, Escalation, Ageing, Last Update, and Action. The 'Ageing' column is highlighted with a blue box, showing values like '1d 14h', '1d 14h', '2d', '3d', '7d 23h', '8d 4h', '9d 20h', '9d 20h', '13d 23h', '13d 23h', and '13d 23h'. The 'Status' column uses color-coding: 'In Progress' (blue), 'Job Done' (green), and 'Received' (red). The 'Escalation' column uses icons: 'Level-1' (triangle), 'Level-4' (square), and 'NA' (circle).

ID	Subject	Category/Subcategory	Flat	Status	Assignee	Escalation	Ageing	Last Update	Action
1726	Fuse issue in the lift. No po...	Electrical / house wires	B-148	In Progress	Manav	Level-1	1d 14h	19 Dec, 3:08 PM	Print
1725	Tap not working in my hou...	Plumbing	A-001	Job Done	Nitesh	Level-1	1d 14h	18 Dec, 2:19 AM	Print
1724	plumbing	Electrical / house wires	0-0	In Progress	Test Prod KP	Level-1	2d	17 Dec, 4:19 PM	Print
1723	Test	Car parking / area	A-55	In Progress	Manav	Level-4	3d	19 Dec, 3:09 PM	Print
1721	Gshwj	Car parking / area	D-A while back I needed to...	Received	rushika	Level-4	7d 23h	12 Dec, 4:20 AM	Print
1720	test test test	Car parking / common	B-2	In Progress	Manav	Level-4	8d 4h	19 Dec, 3:09 PM	Print
1719	Chuc	Cleaning and Maintenance	D-A while back I needed to...	Job Done	Trishia	Level-4	9d 20h	17 Dec, 8:48 PM	Print
1718	Bzzzbz	cleaning / Washroom Clea...	D-A while back I needed to...	In Progress	Manav	Level-4	9d 20h	19 Dec, 3:09 PM	Print
1717	EDWF	Cleaning and Maintenance	D-A while back I needed to...	Received	None	Level-4	9d 20h	19 Dec, 11:22 PM	Print
1707	Test parking in wrong space	Car parking / common	D-A while back I needed to...	Received	rushika	Level-4	13d 23h	19 Dec, 2:24 PM	Print
1706	Saarthi_Demo_8	Car parking / area	D-A while back I needed to...	Job Done	rushika	Level-4	13d 23h	19 Dec, 2:24 PM	Print
1705	Saarthi_Demo_7	Electrical / House holds	D-A while back I needed to...	On Hold	rushika	NA	13d 23h	19 Dec, 4:35 PM	Print
1704	Saarthi_Demo_6	Car parking / area	A-133	On Hold	rushika	NA	13d 23h	19 Dec, 4:35 PM	Print

2. Improved UI for Status & Escalation columns in dashboard complaint listing

Path : Dashboard >> Helpdesk >> Complaints

The Status Column on the Helpdesk Listing Page now features color-coding for improved visibility. Additionally, the urgent symbol has been repositioned next to the status for better clarity.

The Escalation Column has been redesigned with iconized representations to enhance the user experience.

Select Society: **Prod The Island Plus** | 2024-2025 Financial Year | FAQ | Society Admin

Help Desk >> Complaints

Complaints | Summaries | + Raise New

Search: ID or word within the subject | Status: New, On Hold, ... | Flat: Flat | Category: Category | Sub-Category: Sub-Category | Assignee: Assignee

Type: Type | Escalation: Escalation | Basis: Creation Date | From: From | To: To | Submit | X Reset Filters

1052 Results Found | Download Report

ID	Subject	Category/Subcategory	Flat	Status	Assignee	Escalation	Ageing	Last Update	Actions
1727	test	Car parking / common	A-96	In Progress	MEMEBER	L ●●●●●	6d 21h	24 Dec, 6:19 AM	Print
1726	Fuse issue in the lift. No power...	Electrical / house wires	B-148	In Progress	None	L ●●●●●	12d 15h	19 Dec, 3:08 PM	Print
1725	Tap not working in my house. ...	Plumbing	A-901	In Progress	Roshini	L ●●●●●	12d 15h	26 Dec, 4:58 PM	Print
1724	plumbing	Electrical / house wires	0-0	In Progress	Test Prod KP	L ●●●●●	13d 1h	17 Dec, 4:19 PM	Print
1723	Test	Car parking / area	A-55	In Progress	None	L ●●●●●	14d 1h	19 Dec, 3:09 PM	Print
1721	Gshwj	Car parking / area	D-A while back I needed to co...	Reopened	rushika	L ●●●●●	19d	12 Dec, 4:20 AM	Print
1720	test test test	Car parking / common	B-2	In Progress	None	L ●●●●●	19d 4h	19 Dec, 3:09 PM	Print
1719	Chuc	Cleaning and Maintenance	D-A while back I needed to co...	Job Done	Trishla	L ●●●●●	20d 20h	17 Dec, 6:48 PM	Print
1718	Bzzbz	cleaning / Washroom Cleaning	D-A while back I needed to co...	In Progress	None	L ●●●●●	20d 20h	19 Dec, 3:09 PM	Print
1717	EDWF	Cleaning and Maintenance	D-A while back I needed to co...	Reopened	None	L ●●●●●	20d 20h	9 Dec, 11:22 PM	Print
1707	Test parking in wrong space	Car parking / common	D-A while back I needed to co...	Reopened	rushika	L ●●●●●	24d 23h	9 Dec, 2:24 PM	Print
1706	Saarthi_Demo_8	Car parking / area	D-A while back I needed to co...	Job Done	rushika	L ●●●●●	24d 23h	9 Dec, 2:24 PM	Print
1705	Saarthi_Demo_7	Electrical / House holds	D-A while back I needed to co...	On Hold	rushika	---	24d 23h	5 Dec, 4:35 PM	Print