

Society Dashboard Updates (Sep-2024)

Revamped Advance Receipt Creation Flow

Path : Accounts >> Dues and Receipts >> Dues Tracker >> Collect Advance

Payments made outside the Mygate App have to be logged into the ERP software by the accountant / admin on a regular basis. By revamping the advance receipt form, we are introducing a flow that is faster, more stable and streamlined in mode selection.

Through an intuitive interface, the user would also be able to learn quicker and create error free receipts.

The screenshot shows the 'Collect Advance' interface for 'Sync2 Test UL' society. The breadcrumb path is 'Accounts >> Dues and Receipts >> Dues Tracker >> Collect Advance'. The owner is 'MRS. ANU BHARGAVA & MR. ASHOK BHARGAVA' and the tenant is 'NA'. The 'Payment Mode & Details' section includes a radio button for 'EFT (UPI/IMPS/NEFT/RTGS)' which is selected, and options for 'Cheque', 'Cash', and 'POS'. The 'Receipt Date' is '10/09/2024', 'Receiving Amount' is '15000', 'Receiving Account' is 'Axis Bank/AXIS BANK-5354', and 'Advance Account' is 'A-4-Water Advance'. The 'UTR Number/Reference' is '98765367289' and the 'Description' is 'Water Advance collected.'. At the bottom, the total receipt amount is '₹ 15000' with 'Cancel' and 'Generate Receipt' buttons.

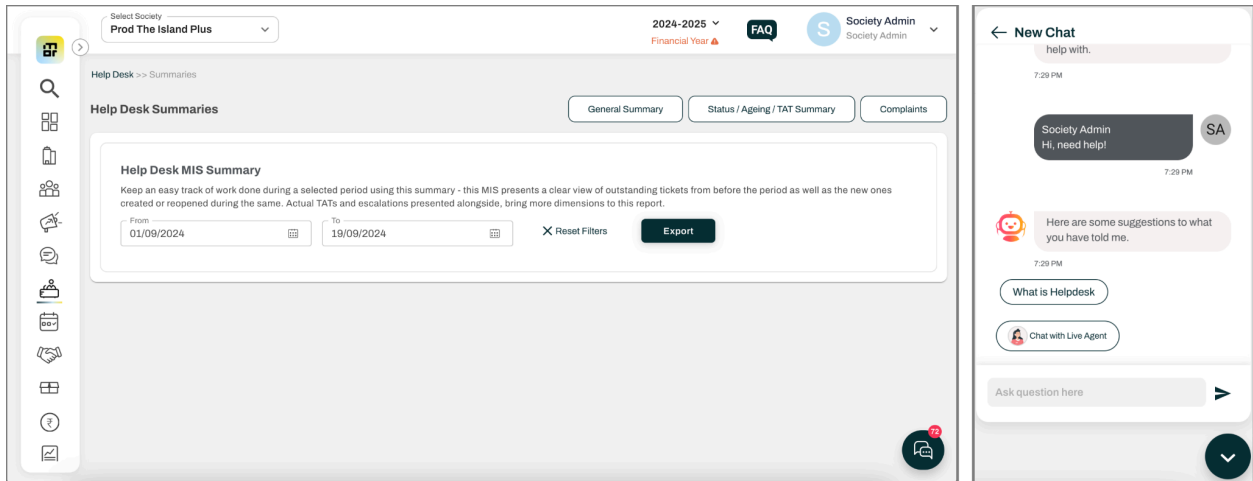
Redesigned advance receipt collection flow

Improved Support Chat experience for admins on dashboard

In order to ensure a better resolution time for chat requests created by admins, the following updates have been made -

- Making it simpler to reach out to a chat agent
- Providing count of new responses from chat support as nudge upon login

A few more updates are lined up for chat support to improve bot's response to admin queries. Stay tuned!

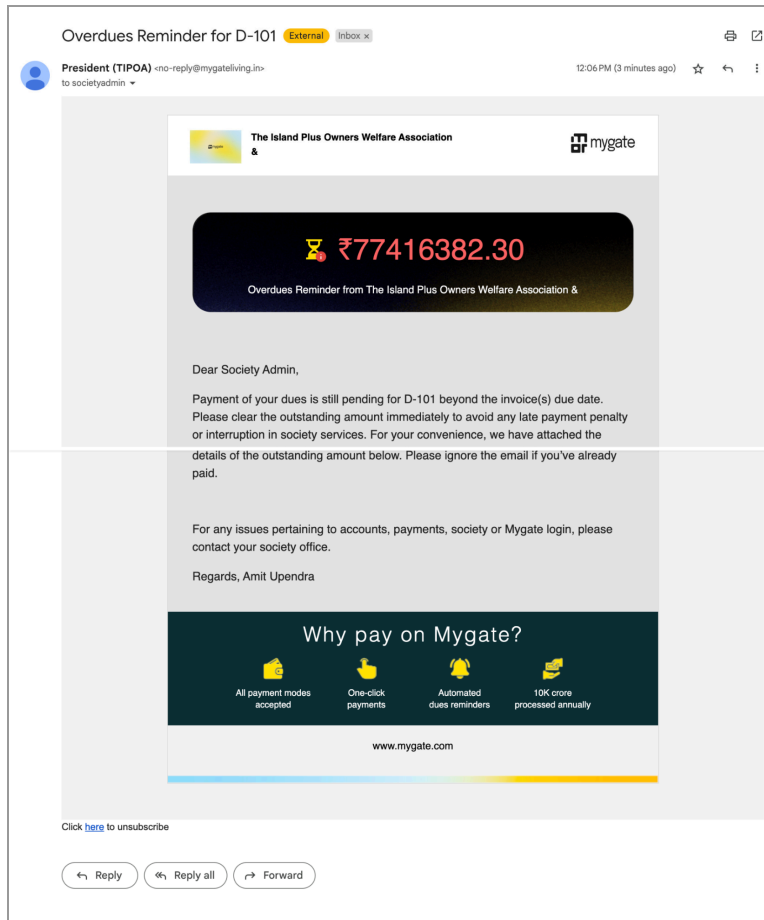


New Overdues Receipt Email Template

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.

Currently, only the overdue notice email has been enhanced and released, with updates to invoices, receipts, and reminders coming soon!



Email Template

Budget creation made easy through an upload flow

Path : Dashboard >> Accounts >> Budget >> New Budget

Dashboard users can now download a sample CSV file to upload budgets in bulk for all expense ledgers during budget creation, eliminating the need to enter values manually against each account.

Select Society
Prod The Island Plus

2024-2025
Financial Year

FAQ

Society Admin
Society Admin

Accounts >> Budget

Update - Creating a budget for your society made easy! Expense amounts can now be filled against their ledgers in a sample CSV file & uploaded during budget creation.

New Budget

Name* Financial Year* Budget Period*

2025-2026 Annual

Download Upload ^{NEW}

Budget Report

EXPENSE ACCOUNT	Apr25-Mar26
145 Test	<input type="text" value="0"/>
24th Aug	<input type="text" value="0"/>
29th Aug	<input type="text" value="0"/>
Account_mismatch2	<input type="text" value="0"/>

⁷⁵

Additional Updates

1. Suspended banner is now prominently placed on the Invoice Template Listing page for societies which are locked auto-invoicing in ERP
2. Facility managers & custom roles having access to the amenity booking page can now use the "I will pay later" feature to book any amenity (Earlier, only society admins had access to the feature)