ERP Dashboard Updates (Feb’ 2025)

Improvements in the new Invoice Generation Flow

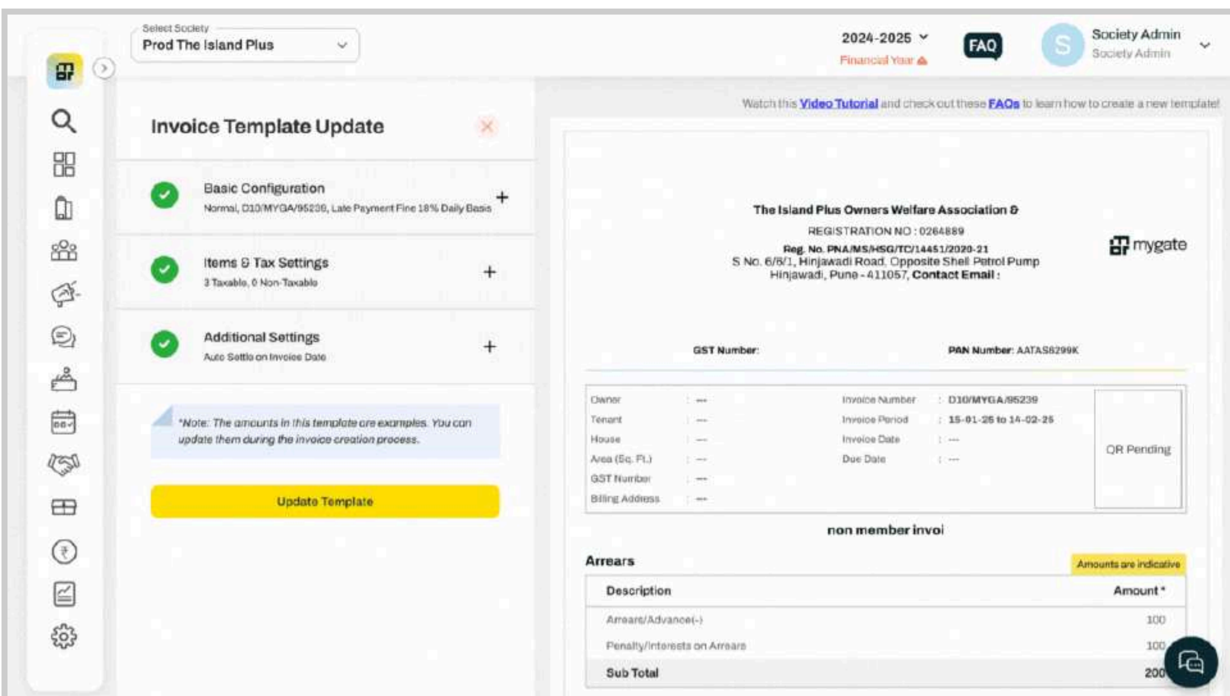
The milestone-based invoice generation flow has been rolled out to all societies. Based on user feedback, further improvements have been implemented to enhance the process, ensuring a more seamless and efficient invoicing experience.

Path: Dashboard >> Accounts >> Raise Invoices >> Generate Invoice

1. Reduced Steps for Template Editing

Previously, users had to go through all the following pages of the template form sequentially when making edits to one of the first two sections, which was time-consuming. With this update, the editing process has been streamlined - users can now directly access the specific section they want to modify and save their changes in a single click.

This enhancement improves efficiency and simplifies the workflow for users generating recurring invoices.

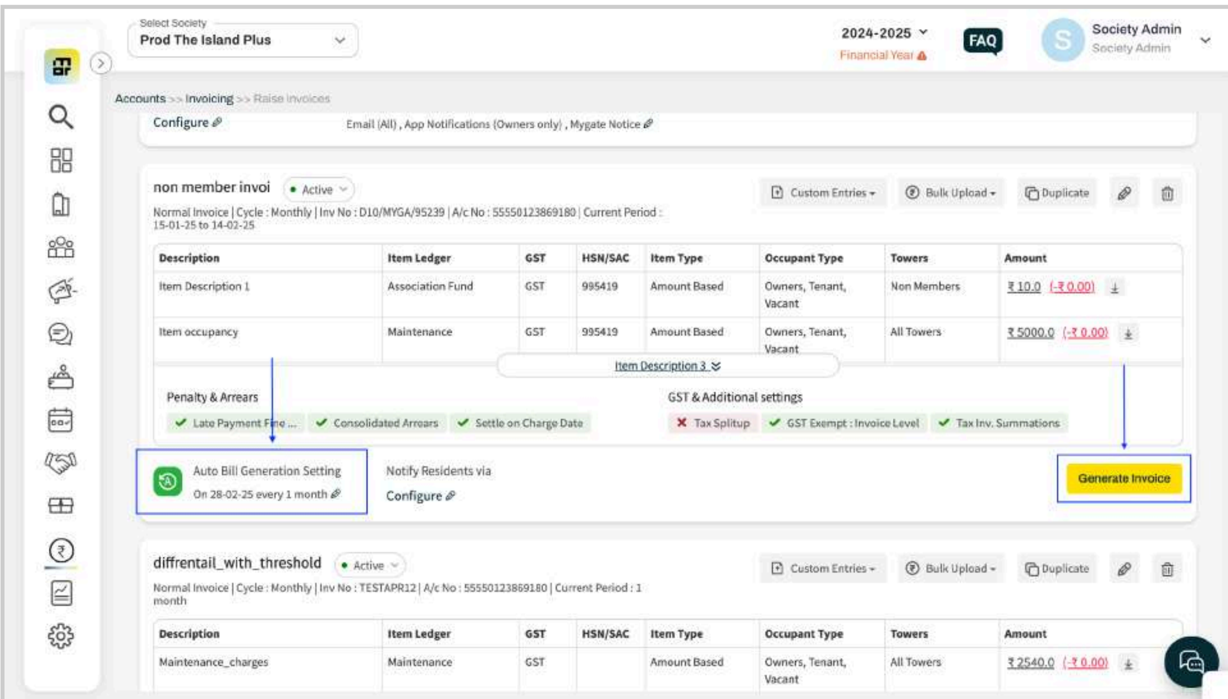


Reduced steps for template editing

2. "Use This Template" Renamed to "Generate Invoice" & Label added for Auto-Generation of Invoices

Previously, to generate an invoice, users had to click on the "Use this template" button, which caused confusion. To enhance clarity and improve the user experience, this button has now been renamed to "Generate Invoice", making the action more intuitive and straightforward.

Also, a label for auto-generation of invoices will now be displayed when the user has configured a template for automatic invoice generation, improving visibility and clarity for users.

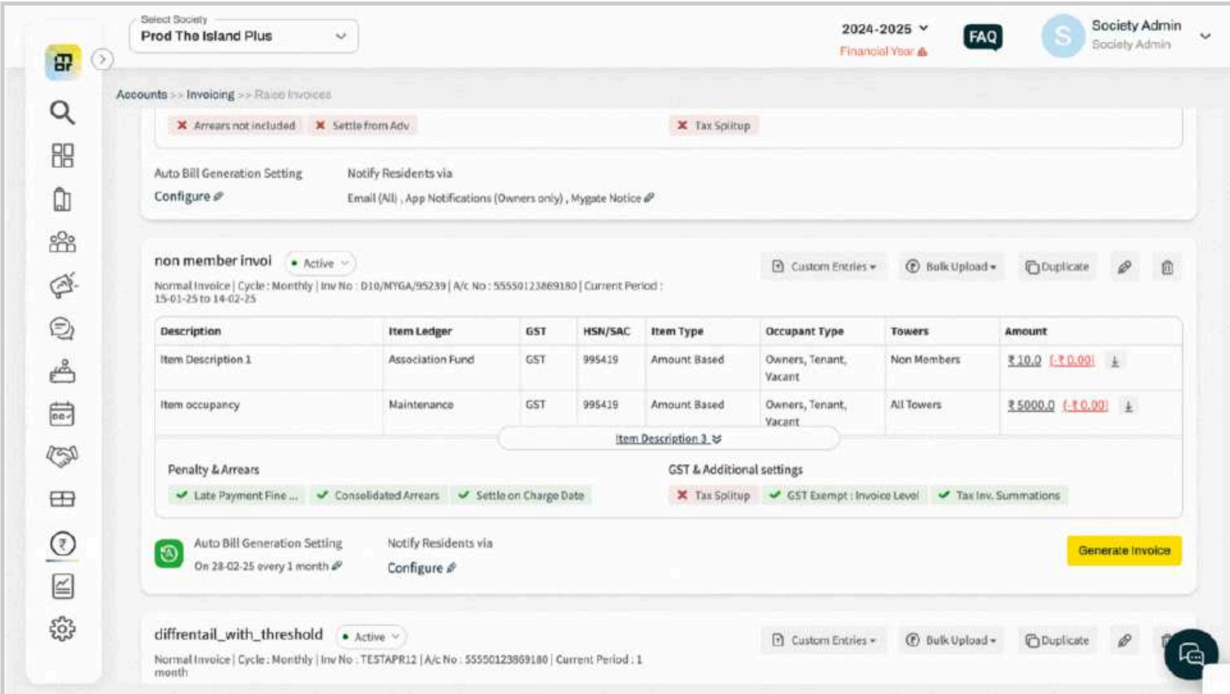


Label for Auto Generation & renaming of "Use this Template" button

3. Removal of the 'Template Confirmation Step' from Invoice Generation Journey

Previously, the invoice generation process included four milestones, with the first requiring users to review and edit the template before proceeding. While a bit helpful for first-time users, this added an extra step for power users generating invoices regularly.

To streamline the process, we have reduced it to 3 milestones, eliminating unnecessary steps for recurring users. Now, upon clicking "Generate Invoices" on the template, users can directly input the date and amount and proceed efficiently.

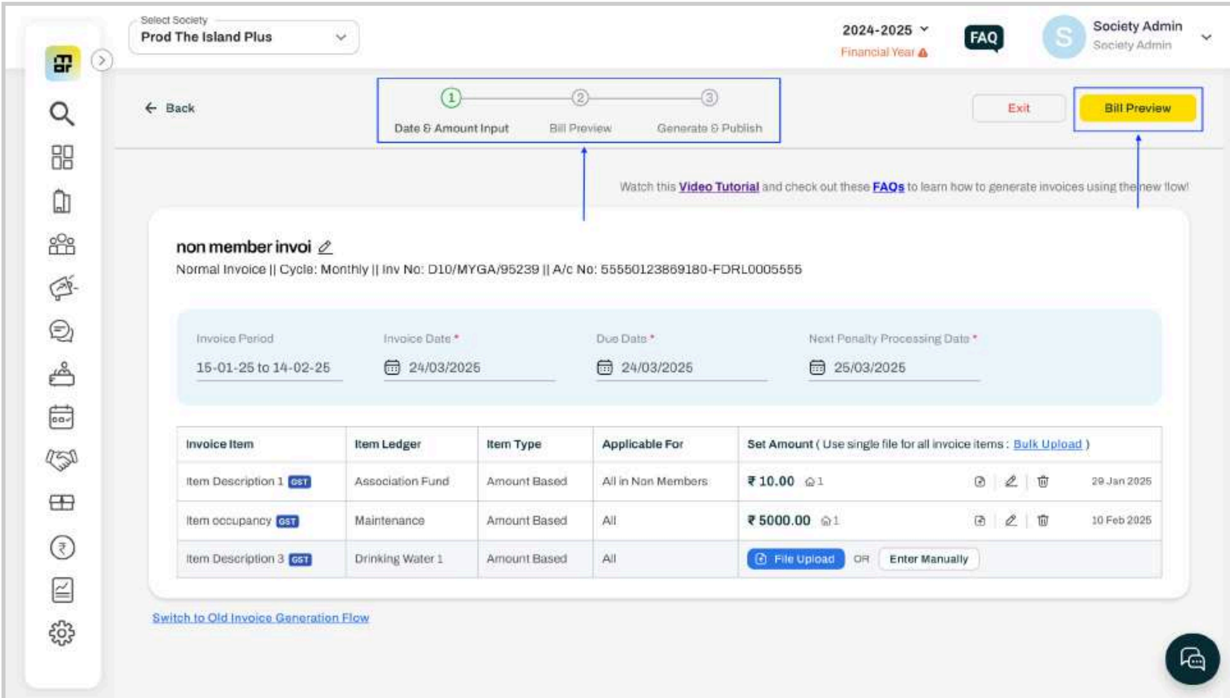


Removal of Template Confirmation Step from Invoice Generation Journey

4. Navigable Milestones in the Invoice Generation Flow

Milestones within the invoice generation flow are now clickable, allowing users to navigate seamlessly between different stages of the process. This enhancement improves usability by enabling users to jump to specific milestones without having to go through each step sequentially.

Additionally, the "Next" button has been renamed to reflect the upcoming milestone, providing better clarity on the next step in the process.



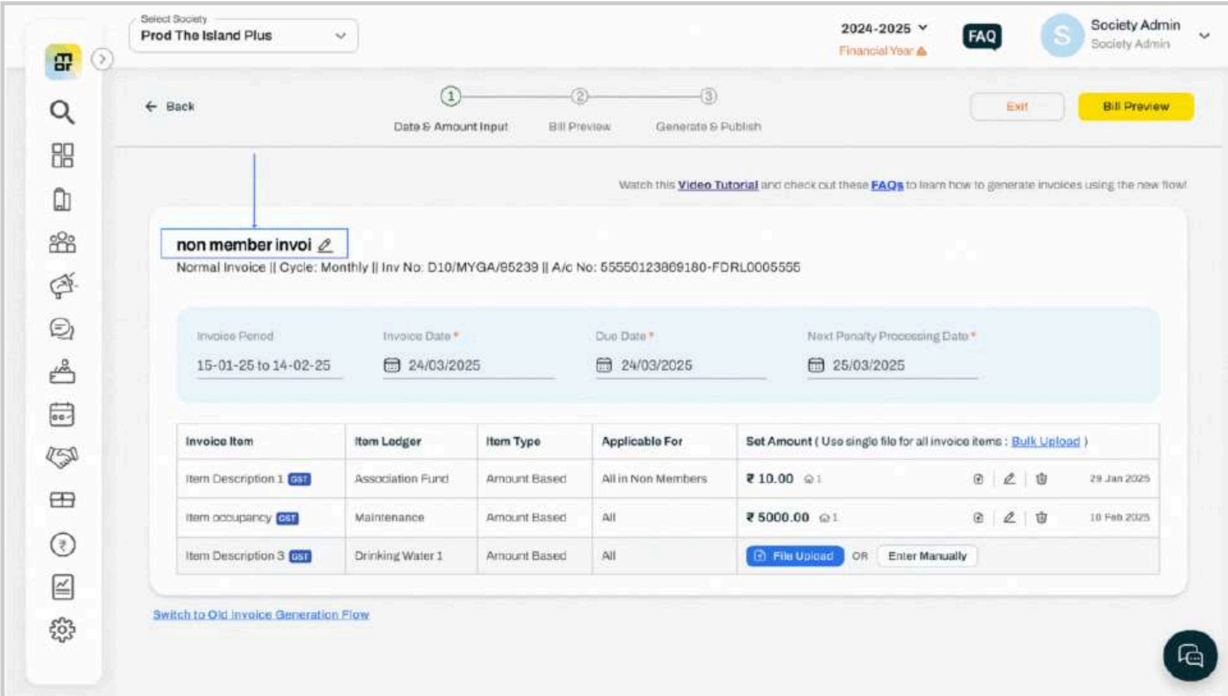
Navigable Milestones in the Invoice Generation Flow

5. Option to 'Edit Invoice Description' within the generation journey

Users can now edit the invoice description directly within the bill generation journey, eliminating the need to go back to the template editing flow. This enhancement streamlines the process, allowing users to make necessary modifications to the description without disrupting the flow of invoice creation.

By enabling on-the-go edits, this option ensures greater efficiency and a smoother user experience.

Note: The updated invoice description (like the Invoice Period) will be saved only after the invoices are generated using the template.



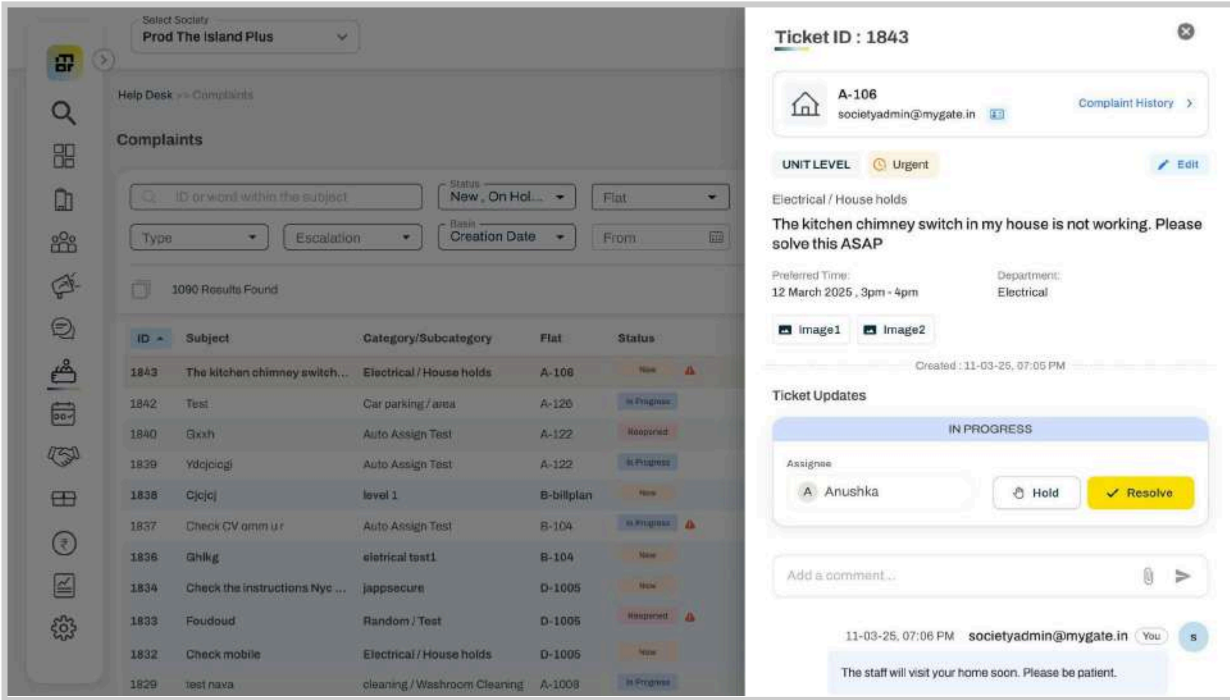
Option to Edit Invoice Description within the journey

Helpdesk - Complaint details page improvements for managers

Path: Dashboard >> Helpdesk >> Complaints

The ticket detail page (side drawer) has been enhanced with a new interface, aimed to enhance the usability quotient of the helpdesk managers. The improved interface offers the following benefits:

1. Highlighting all essential ticket details such as subject, preferred time, attachments, etc. at the top - this would ensure that helpdesk managers/admins have the necessary information at a glance to take action.
2. Structuring action items like status updates and staff assignments in a guided flow - this would streamline their workflow so that they do not make any errors.



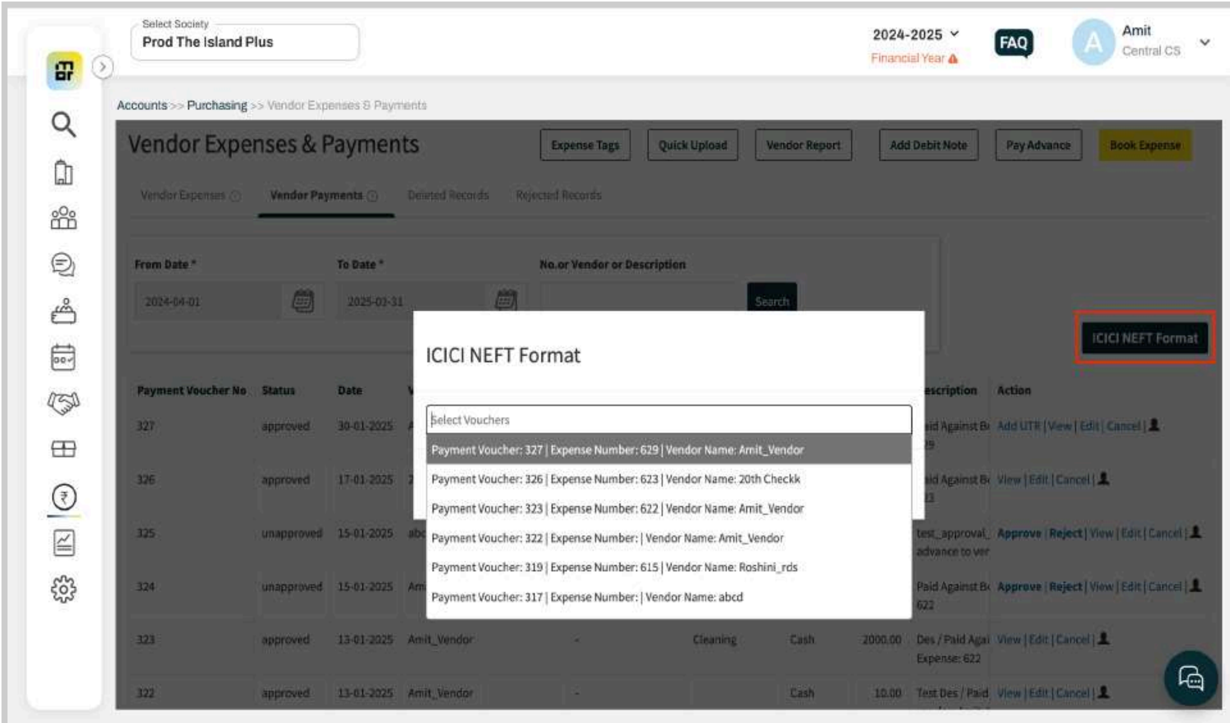
Enhanced Helpdesk Side Drawer

Encrypted Vendor Payments Export for ICICI Bank

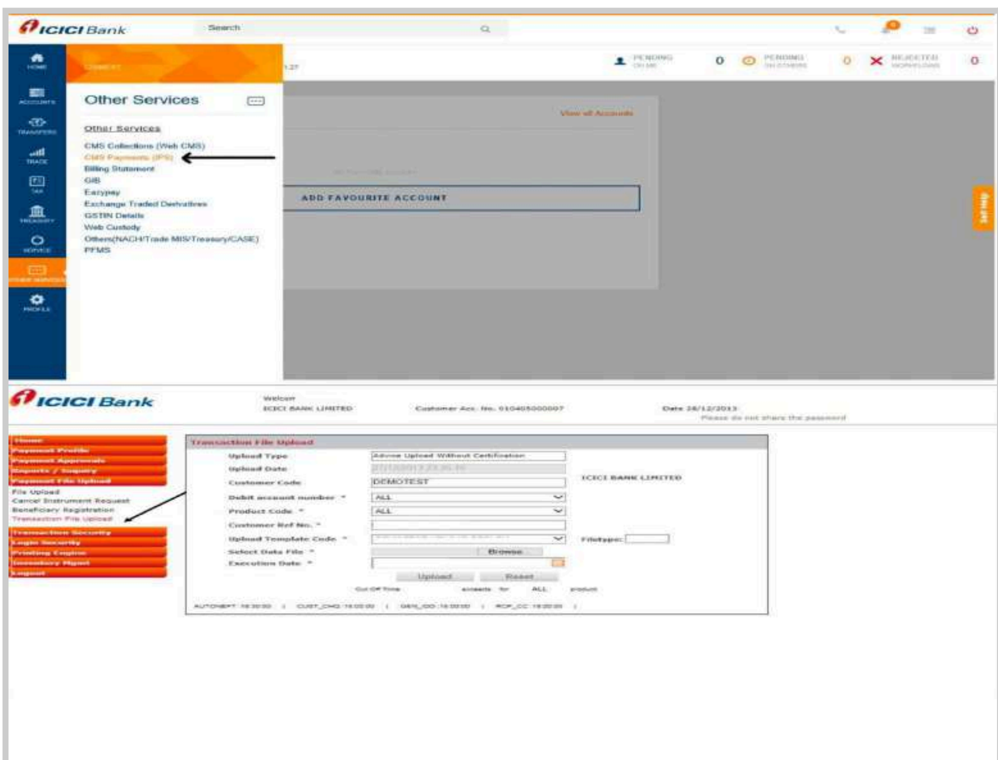
Path: Dashboard >> Accounts >> Purchasing >> Vendor Expense & Payments

Approved vendor bill payments can now be exported from Mygate's ERP to ICICI Bank's net banking portal. This new process brings the following benefits to the society –

1. Digitized approval of payments on both Mygate and ICICI bank portals
2. Avoid delays in vendor payments due to unavailability of signatories in the society
3. The read-only file exported cannot be altered, removing chances of manipulation of payments



Select and export approved vendor payments



Upload the file into the ICICI netbanking portal

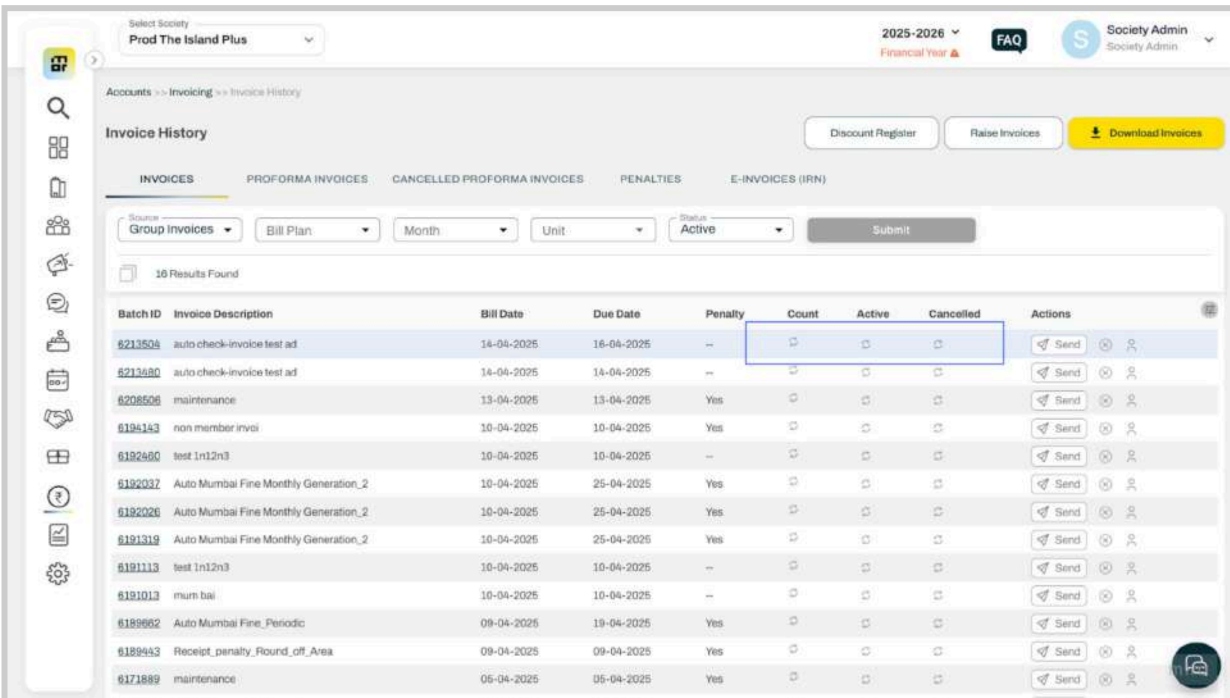
Invoice History page load made 5x faster

Path: Dashboard >> Accounts >> Invoice History

The Invoice History has been optimised for significantly faster page loading performance, ensuring a smoother and more efficient user experience. This enhancement improves user satisfaction by:

1. Reducing wait times (some times leading to errors)
2. Allows users to quickly access their invoices without delays.

Note - Invoice batches are now loaded first along with the page, followed by the count of active and cancelled invoices in each row.

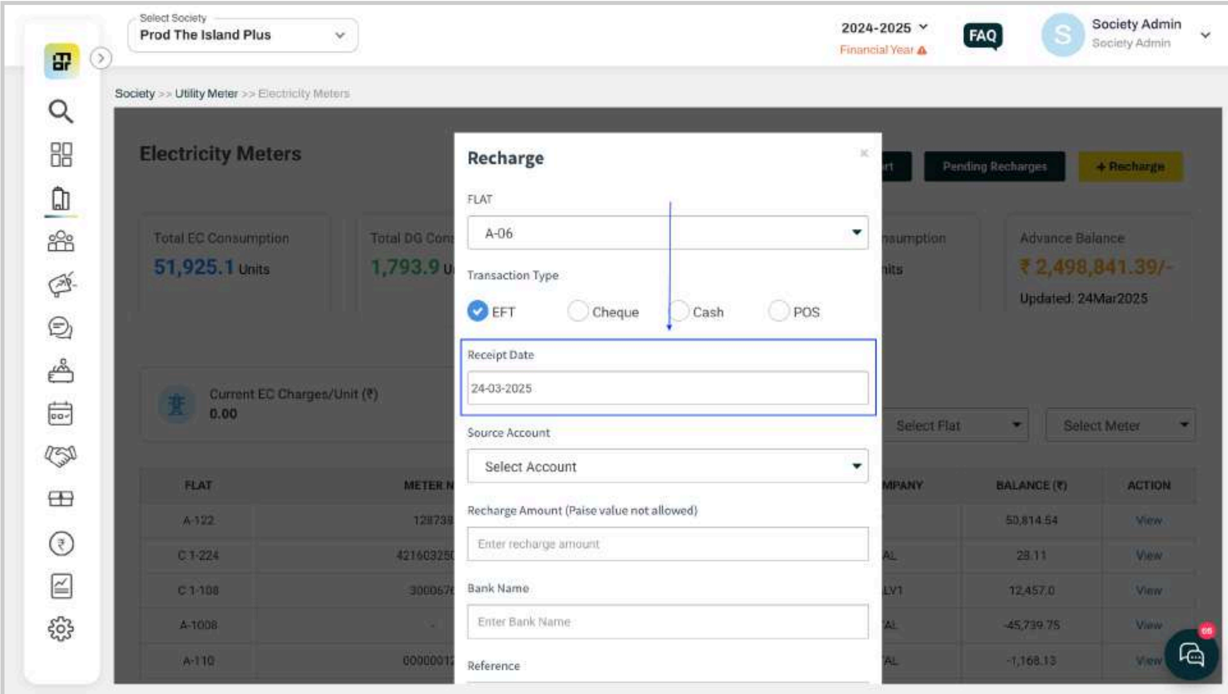


Addition of ‘Receipt Date’ for prepaid recharges from admin dashboard

Path: Dashboard >> Society >> Utility Meter >> Electricity Meter >> Recharge

When making a prepaid recharge through the dashboard, an additional input field has been added to capture the actual receipt date. This is useful in cases where the resident has made the payment earlier, but the recharge is processed later by the society office.

Recording the actual receipt date ensures accurate and easy bank reconciliation, even if there is a delay in recharging.

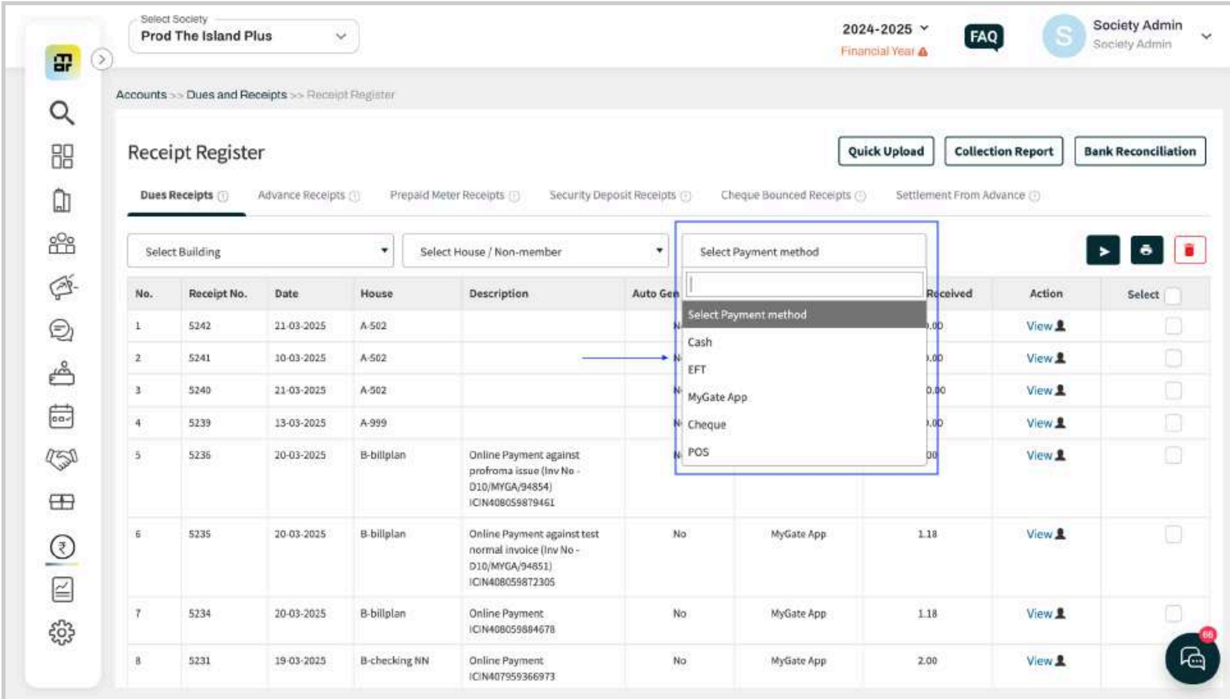


"Receipt Date" in Prepaid Recharge form

Addition of 'Payment Mode' Filter in Receipt Register

Path: Dashboard >> Accounts >> Dues & Receipts >> Receipt Register

A new "Payment Mode" filter has been introduced on the Receipt Register page. This allows users to filter receipts based on the mode of payment used by the resident to settle the invoice.
With this enhancement, users can quickly track and categorize payments, improving efficiency of actions such as send, print, cancel or reversal of a specific set of receipts.



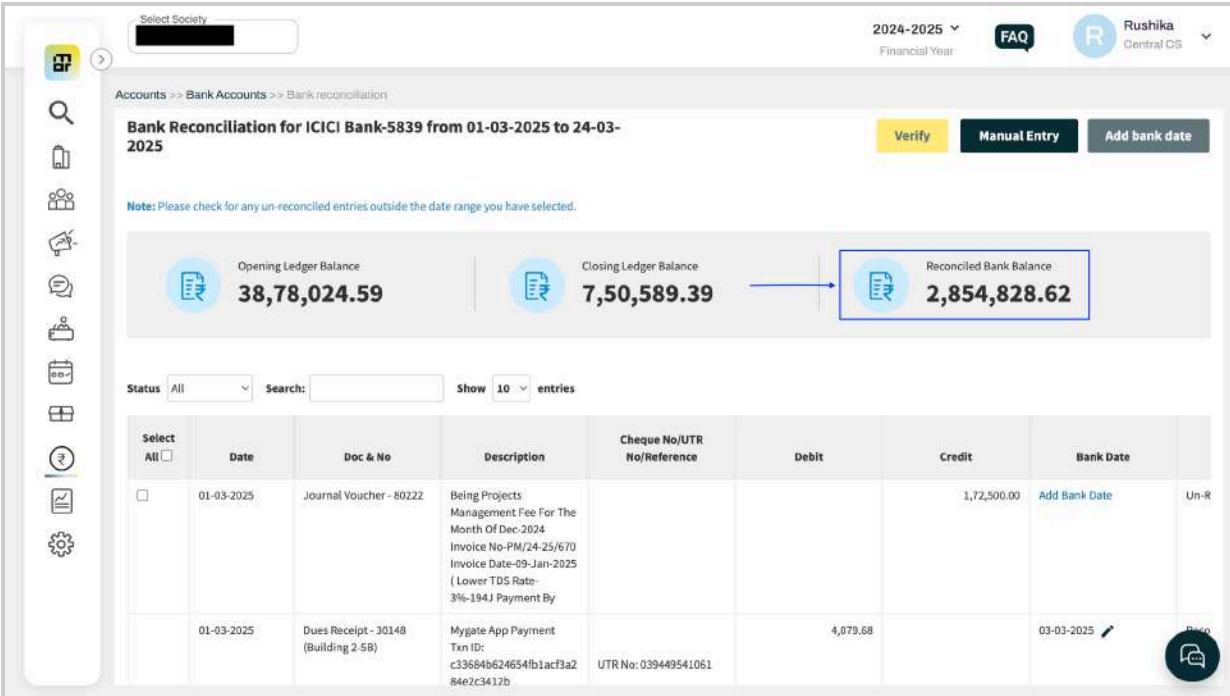
“Payment mode” filter on Receipt Register

Displaying ‘Reconciled Bank Balance’ in manual bank reconciliation

Path: Dashboard >> Accounts >> Bank Accounts >> Bank Reconciliation

The final **Reconciled Bank Balance** is now displayed for the selected period in manual bank reconciliation flow. This value is also dynamically updated after each update of the bank date to unreconciled transactions . This eliminates the need to generate a separate report to check the updated bank balance, making the reconciliation process more efficient and seamless.

This enhancement improves usability and ensures real-time visibility of post action values.



"Reconciled Bank Balance" alongside opening and closing balance

Auto settlement of Proforma Invoices when paid through the app*

Quite a few societies prefer raising proforma invoices to control their GST liabilities. These special invoices appear on the resident app for payment like any other normal invoices - with all the modes available to the users.

Until now, app payments made against proforma invoices were parked into the house's advance account for the society admin to make the settlement manually. While this gives flexibility to settle the older invoices first, it also adds to the daily work of the accountant. With this new update, if a resident makes a payment equal to or more than the proforma invoice value it automatically settles that invoice.

*Note - If a partial payment is made against a proforma invoice, the module will follow the old flow and let the society accountant settle the invoice manually using the admin dashboard.

INTERNAL - SMS Notifications related to accounting have been discontinued for inactive users

Due to increasing SMS clutter and lower read rates, we have observed that many users are not effectively engaging with SMS-based notifications. Additionally, as per recent TRAI regulations, dynamic links - including payment links - can no longer be shared via SMS.

Given these limitations, we will now be restricting financial communications via SMS. However, rest assured that email and app notifications will continue to be used as the primary channels for financial updates, ensuring a seamless and reliable communication of accounting entries.

*Affected communications include Invoicing, Receipts, Reminders, and Statements.

Additional Updates

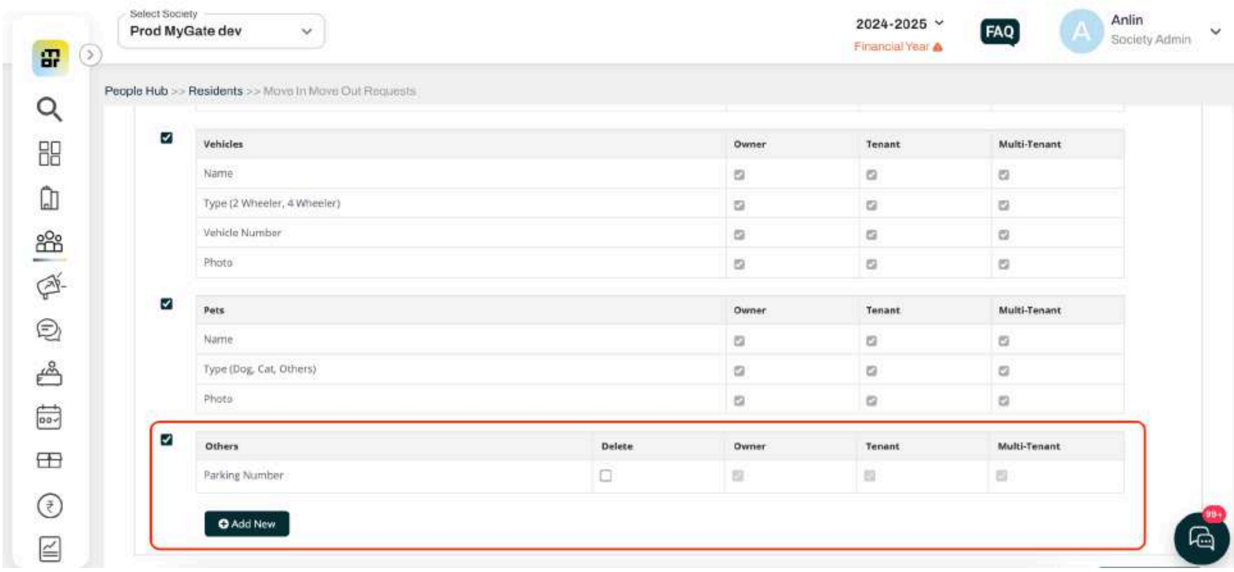
- Invoicing-related notices (on the resident app Notice Board) will now be sent only to the specific houses for which the invoice has been raised.
- Bulk cancellation of vouchers has now been provided to the society admins. They can select multiple JVs to do this, similar to the option already available to the support team.
- INTERNAL - Ledgers involved with the invoice batches will also be exported within the Next Fine Date upload file. This would help the MIS and Support team identify the batches with better clarity while applying penalty dates in bulk.
- INTERNAL - It is now possible to run backdated accumulated penalty calculation for a period by the MIS team. This improves the efficiency by many fold from before when this option was executable only one date at a time.

Security Dashboard Updates (February 2025)

Move-in Move-out Enhancements - Custom Fields Addition in Move-in form

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

The societies require the residents to provide information specific to their society while moving in. This information might vary from society to society but is essential for the admins. Hence, we have added another section in the Move-In configuration form called 'Others' where the admins can configure up to 5 custom fields. These fields can be configured for all user types, and the same will be reflected for the residents to fill out the information from the app.



This will benefit the admins to capture specific details and thereby maintain a digital record in our system eliminating physical forms for details governed by the society norms.

Tenant Approval through the Owner

When a tenant or multi-tenant registers to the app, the owners can now approve or reject the request. The admins will not need to approve these requests and the access to our app will be based on the approval provided by the owner of the flat the tenant is registering. An email with the link to approve will be triggered to all the owners registered in the flat once the tenants have registered. Once approved, the 'Approved By Owner' details will be shown to the admins in the Resident details section of the Resident list.

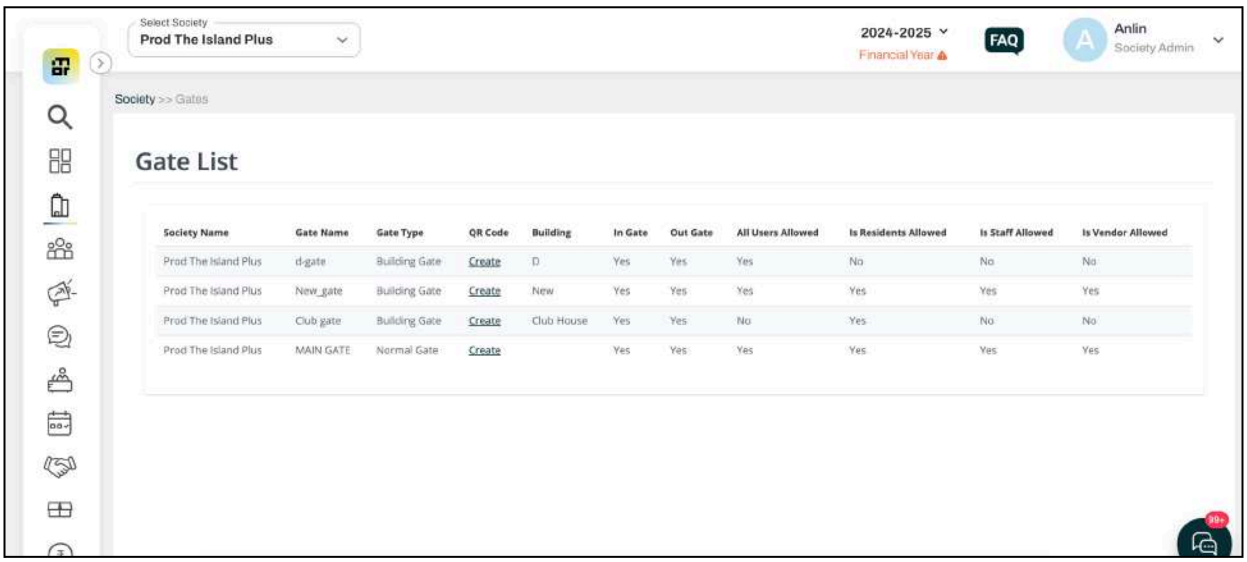
This will help the society secure the new tenant approvals and provide access only to the right tenants registering. This will ease the admins by avoiding any wrong access given to tenants or multi-tenants. The owners can also verify the rental and other related documents of their tenants from the app itself maintaining a digital imprint.

QR Generation for Society Admins

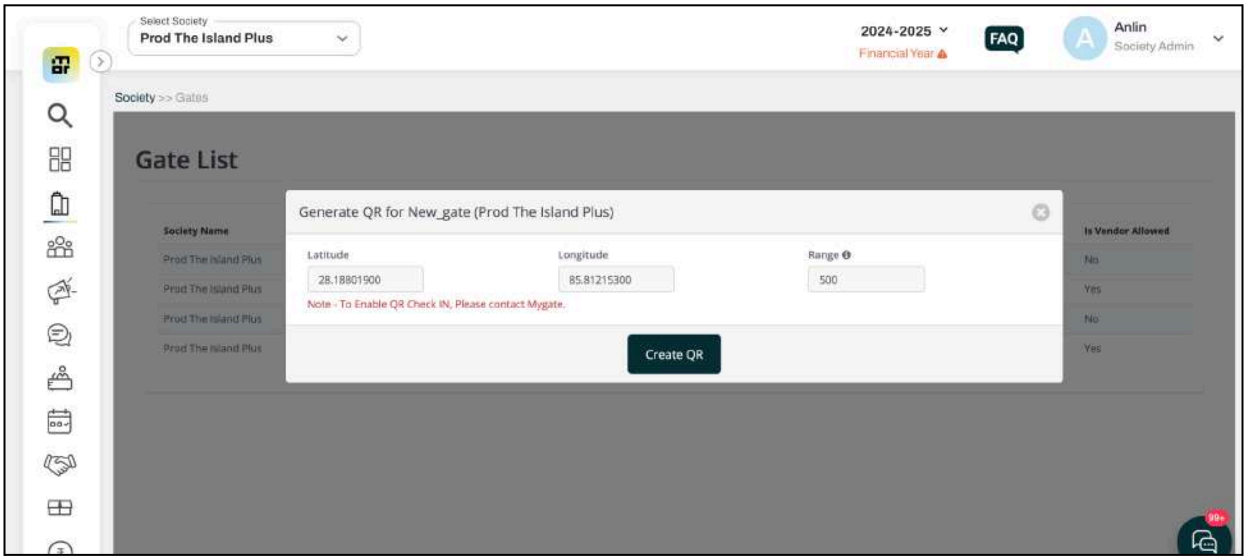
Path: Society >> Gates

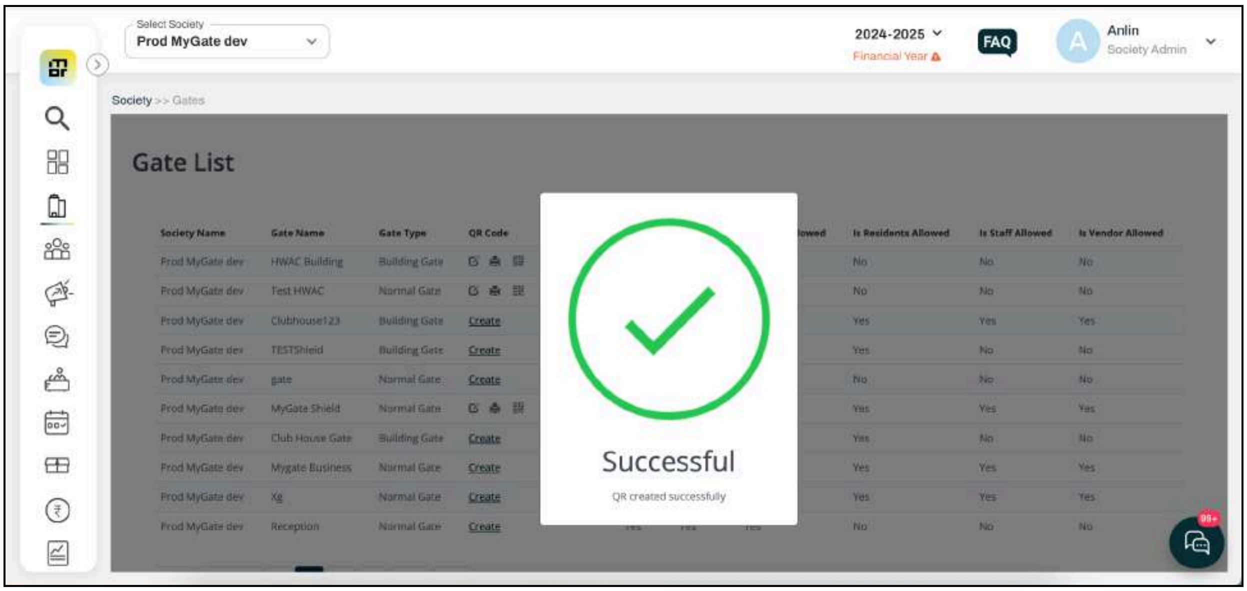
The QR-based check-in aims to reduce the time spent waiting at the gate. This will allow visitors to scan the QR, enter their details, and submit them for resident approval which saves the guard's time for entering the details of every visitor and would require the guard to just 'allow in' the visitor based on the resident's approval. The Society Admins would also be able to generate the QR code for a gate from the admin dashboard.

Click on Society >> Gates >> Click on 'Create' in the QR code column against the gate; the QR needs to be generated.



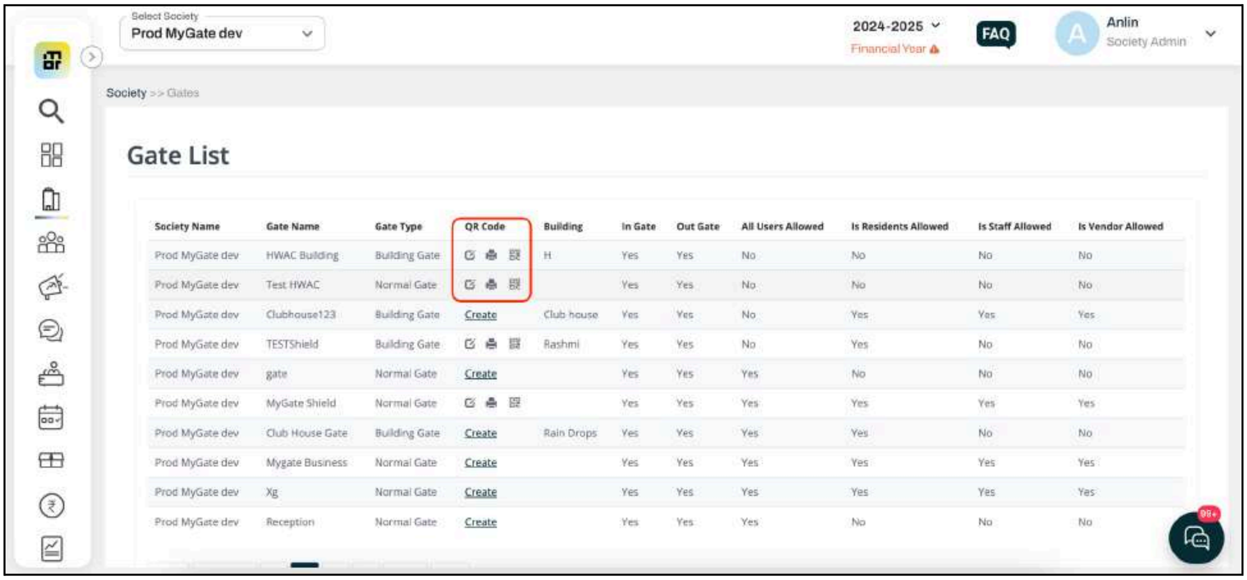
Once clicked, a pop-up showing the current society Lat-Long and the range for QR verification will be displayed. The admin can change the range if required (in meters). Click on 'Create QR' seen in the pop-up displayed, and you will receive a success message once the QR is created. The QR has now been successfully created.





After creation, you will be redirected to the Gate list page.

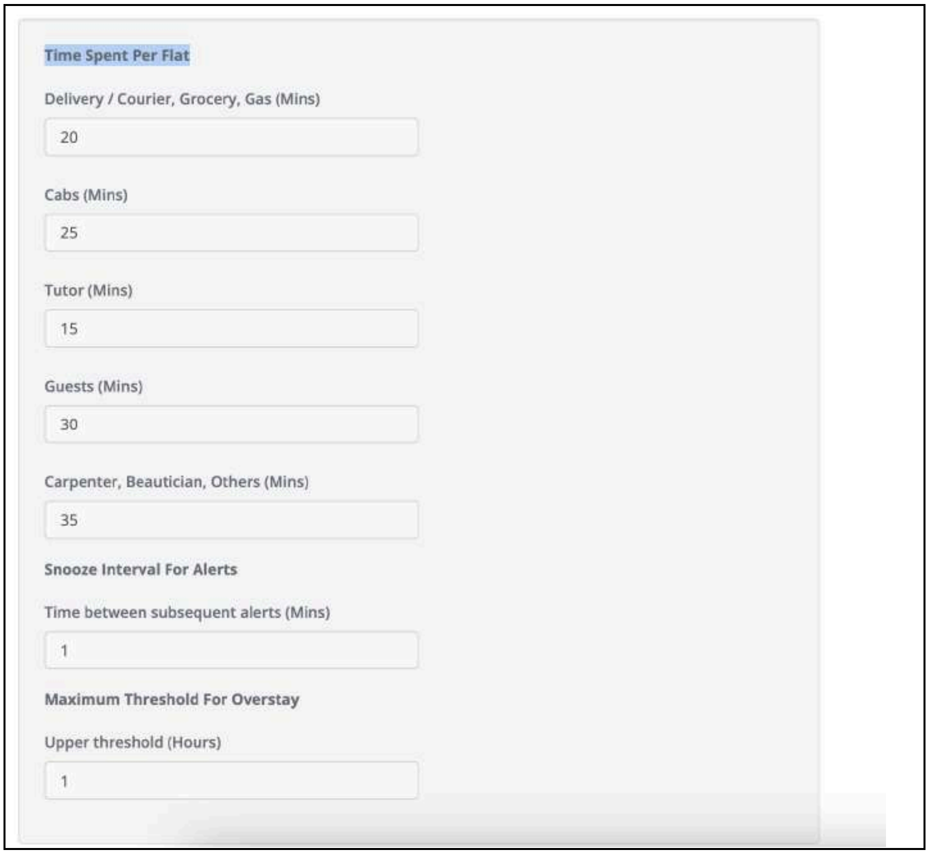
- Click on the ‘Print’ icon to print the QR code
- Click on the ‘QR’ icon for preview
- Click on the ‘Edit’ icon to edit the QR code and update it.



Category-Wise Overstay Alert

Path: Manage Society >> Manage Society Details >> Society Settings >> Time spent per flat

Every society could configure overstay alerts only for some categories some of which were combined. The internal teams will now be able to configure on behalf of the admins the alerts as separate categories and manage them better at the gate. Also, we have included the new category called ‘Tutor’ in the configuration to align with the guard app.



Additional Updates

1. Enable the BYOD setting automatically during the creation & editing of society details.
2. Alef Enhancements on Dashboard and Homes
3. Currency handling in Homes and P2P
4. Elastic Search Improvements