

# 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.

Select Society  
Prod The Island Plus

2024-2025  
Financial Year

FAQ

Society Admin  
Society Admin

Watch this [Video Tutorial](#) and check out these [FAQs](#) to learn how to create a new template!

### Invoice Template Update

- Basic Configuration  
Normal, D10/MYGA/95206, Late Payment Fine 18% Daily Basis
- Items & Tax Settings  
3 Taxable, 0 Non-Taxable
- Additional Settings  
Auto Settle on Invoice Date

\*Note: The amounts in this template are examples. You can update them during the invoice creation process.

Update Template

The Island Plus Owners Welfare Association &  
REGISTRATION NO : 0264889  
Reg No. PNA/MS/SG/TC/14451/2020-21  
S No. 6/8/1, Hinjawadi Road, Opposite Shell Petrol Pump  
Hinjawadi, Pune - 411057, Contact Email :

mygate

GST Number: PAN Number: AATAS6299K

Owner	Invoice Number	D10/MYGA/95239
Tenant	Invoice Period	15-01-25 to 14-02-25
House	Invoice Date	
Area (Sq. Ft.)	Due Date	
GST Number		
Billing Address		

QR Pending

non member invoice

Arrears

Amounts are indicative

Description	Amount *
Arrears/Advance(-)	100
Penalty/Interests on Arrears	100
Sub Total	200

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.

Select Society  
Prod The Island Plus

2024-2025  
Financial Year

FAQ

Society Admin  
Society Admin

Accounts >> Invoicing >> Raise Invoices

Configure Email (All), App Notifications (Owners only), Mygate Notice

non member invoi • Active

Normal Invoice | Cycle: Monthly | Inv No: D10/MYGA/95239 | A/c No: 55550123869180 | Current Period: 15-01-25 to 14-02-25

Description	Item Ledger	GST	HSN/SAC	Item Type	Occupant Type	Towers	Amount
Item Description 1	Association Fund	GST	995419	Amount Based	Owners, Tenant, Vacant	Non Members	₹ 10.0 (-₹ 0.00)
Item occupancy	Maintenance	GST	995419	Amount Based	Owners, Tenant, Vacant	All Towers	₹ 5000.0 (-₹ 0.00)

Penalty & Arrears

✓ Late Payment Fine ... ✓ Consolidated Arrears ✓ Settle on Charge Date

GST & Additional settings

✗ Tax Splitup ✓ GST Exempt: Invoice Level ✓ Tax Inv. Summations

Auto Bill Generation Setting  
On 28-02-25 every 1 month

Notify Residents via  
Configure

Generate Invoice

differentail\_with\_threshold • Active

Normal Invoice | Cycle: Monthly | Inv No: TESTAPR12 | A/c No: 55550123869180 | Current Period: 1 month

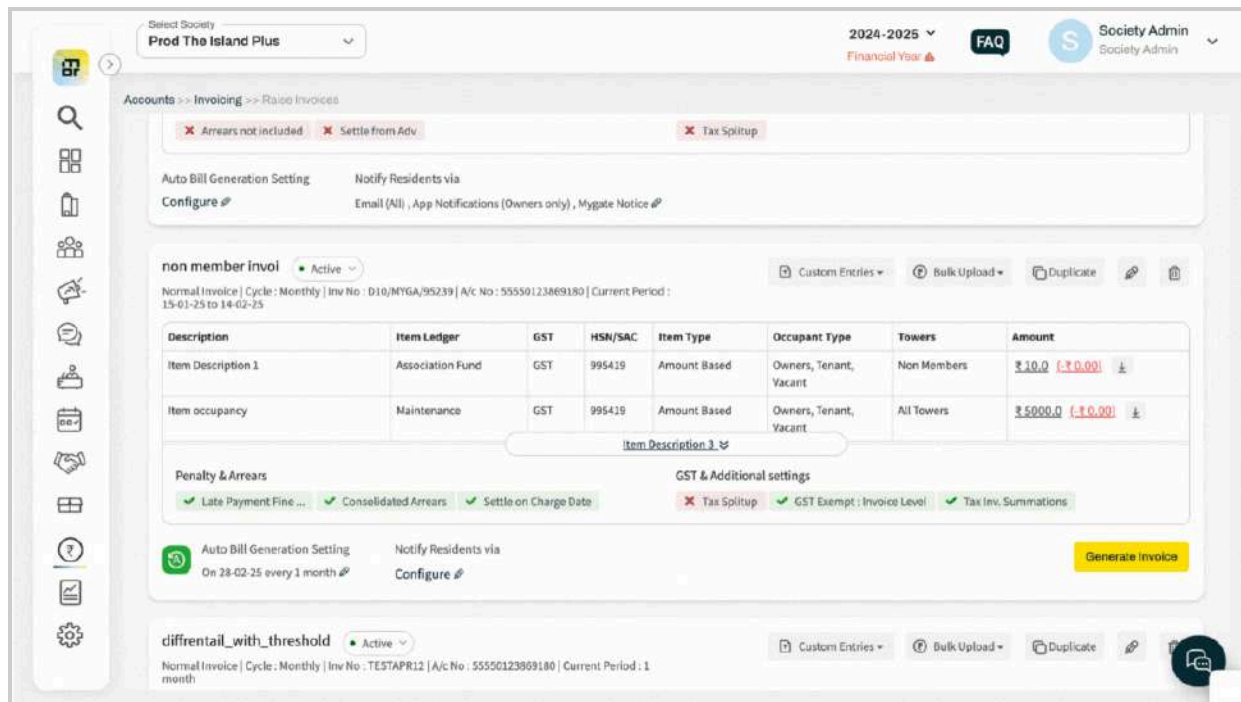
Description	Item Ledger	GST	HSN/SAC	Item Type	Occupant Type	Towers	Amount
Maintenance_charges	Maintenance	GST		Amount Based	Owners, Tenant, Vacant	All Towers	₹ 2540.0 (-₹ 0.00)

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.

Select Society: Prod The Island Plus

2024-2025 Financial Year

Society Admin

Back

1 Date & Amount Input

2 Bill Preview

3 Generate & Publish

Exit

Bill Preview

Watch this [Video Tutorial](#) and check out these [FAQs](#) to learn how to generate invoices using the new flow!

**non member invoice**

Normal Invoice || Cycle: Monthly || Inv No: D10/MYGA/95239 || A/c No: 55550123859180-FDRL0005555

Invoice Period: 15-01-25 to 14-02-25

Invoice Date: 24/03/2025

Due Date: 24/03/2025

Next Penalty Processing Date: 25/03/2025

Invoice Item	Item Ledger	Item Type	Applicable For	Set Amount ( Use single file for all invoice items : <a href="#">Bulk Upload</a> )
Item Description 1 <a href="#">edit</a>	Association Fund	Amount Based	All in Non Members:	₹ 10.00 1 29 Jan 2025
Item occupancy <a href="#">edit</a>	Maintenance	Amount Based	All	₹ 5000.00 1 10 Feb 2025
Item Description 3 <a href="#">edit</a>	Drinking Water 1	Amount Based	All	<a href="#">File Upload</a> OR <a href="#">Enter Manually</a>

[Switch to Old Invoice Generation Flow](#)

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.*

Select Society  
Prod The Island Plus

2024-2025  
Financial Year

FAQ

Society Admin  
Society Admin

Back

1 Date & Amount Input 2 Bill Preview 3 Generate & Publish

Exit Bill Preview

Watch this [Video Tutorial](#) and check out these [FAQs](#) to learn how to generate invoices using the new flow!

**non member invoice** [edit](#)

Normal Invoice || Cycle: Monthly || Inv No: D10/MYGA/65239 || A/c No: 55550123866180-FDRL0005555

Invoice Period: 15-01-25 to 14-02-25 Invoice Date: 24/03/2025 Due Date: 24/03/2025 Next Penalty Processing Date: 25/03/2025

Invoice Item	Item Ledger	Item Type	Applicable For	Set Amount ( Use single file for all invoice items : <a href="#">Bulk Upload</a> )
Item Description 1 <a href="#">edit</a>	Association Fund	Amount Based	All in Non Members	₹ 10.00 <a href="#">edit</a> <a href="#">delete</a> 29 Jan 2025
Item occupancy <a href="#">edit</a>	Maintenance	Amount Based	All	₹ 5000.00 <a href="#">edit</a> <a href="#">delete</a> 10 Feb 2025
Item Description 3 <a href="#">edit</a>	Drinking Water 1	Amount Based	All	<a href="#">File Upload</a> OR <a href="#">Enter Manually</a>

[Switch to Old Invoice Generation Flow](#)

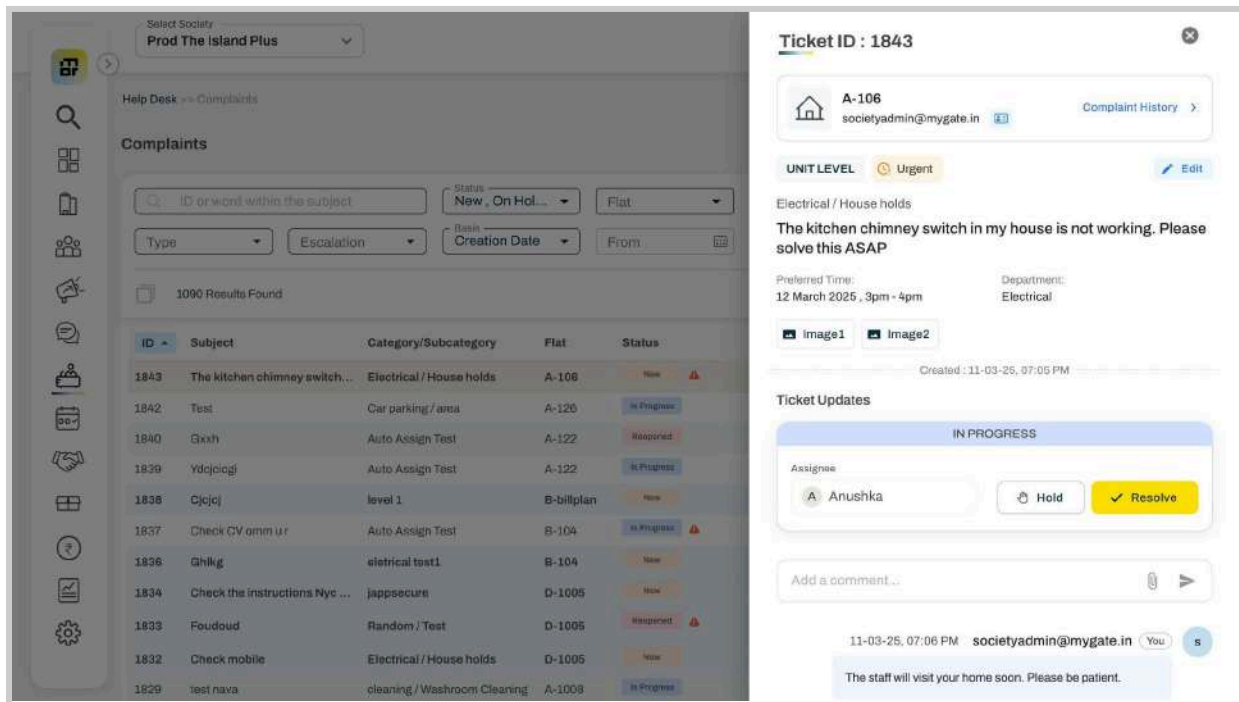
Option to Edit Invoice Description within the journey

## 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





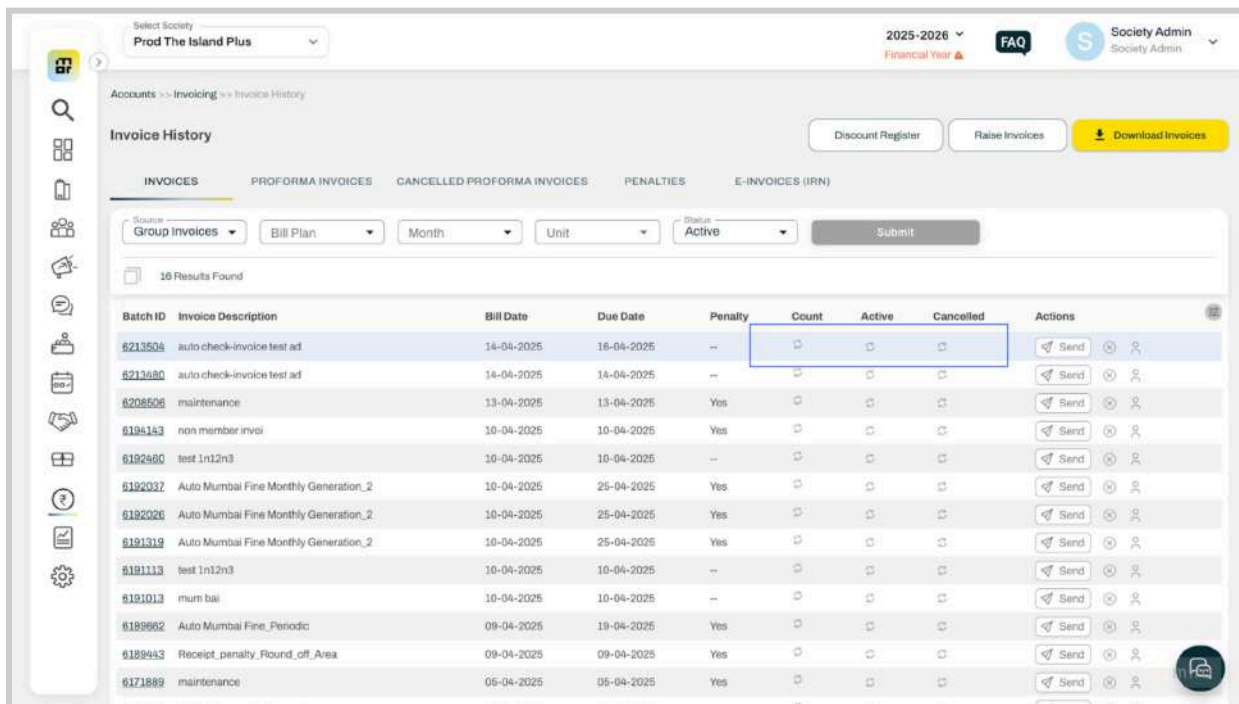
## Invoice History page load made 5x faster

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.



Batch ID	Invoice Description	Bill Date	Due Date	Penalty	Count	Active	Cancelled	Actions
6213504	auto check-invoice test ad	14-04-2025	16-04-2025	--				Send
6213680	auto check-invoice test ad	14-04-2025	14-04-2025	--				Send
6208506	maintenance	13-04-2025	13-04-2025	Yes				Send
6194143	non member invoi	10-04-2025	10-04-2025	Yes				Send
6192460	test 1n12n3	10-04-2025	10-04-2025	--				Send
6192037	Auto Mumbai Fine Monthly Generation_2	10-04-2025	25-04-2025	Yes				Send
6192026	Auto Mumbai Fine Monthly Generation_2	10-04-2025	25-04-2025	Yes				Send
6191319	Auto Mumbai Fine Monthly Generation_2	10-04-2025	25-04-2025	Yes				Send
6191113	test 1n12n3	10-04-2025	10-04-2025	--				Send
6191013	mum bai	10-04-2025	10-04-2025	--				Send
6189962	Auto Mumbai Fine_Periodic	09-04-2025	19-04-2025	Yes				Send
6189443	Receipt_penalty_Round_off_Area	09-04-2025	09-04-2025	Yes				Send
6171889	maintenance	05-04-2025	05-04-2025	Yes				Send

## 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.



The screenshot shows a web application interface for managing electricity meters. A modal window titled 'Recharge' is open, allowing users to record a recharge transaction. The background shows the 'Electricity Meters' dashboard with various statistics and a table of meters.

**Recharge Form Fields:**

- FLAT:** A-06
- Transaction Type:** EFT (selected), Cheque, Cash, POS
- Receipt Date:** 24-03-2025
- Source Account:** Select Account
- Recharge Amount (Paise value not allowed):** Enter recharge amount
- Bank Name:** Enter Bank Name
- Reference:**

**Background Dashboard Data:**

- Total EC Consumption:** 51,925.1 Units
- Total DG Consumption:** 1,793.9 Units
- Current EC Charges/Unit (₹):** 0.00
- Advance Balance:** ₹ 2,498,841.39/-
- Updated:** 24Mar2025

FLAT	METER NO.
A-122	128734
C-1-224	42160325
C-1-108	3000674
A-1008	-
A-110	00300017

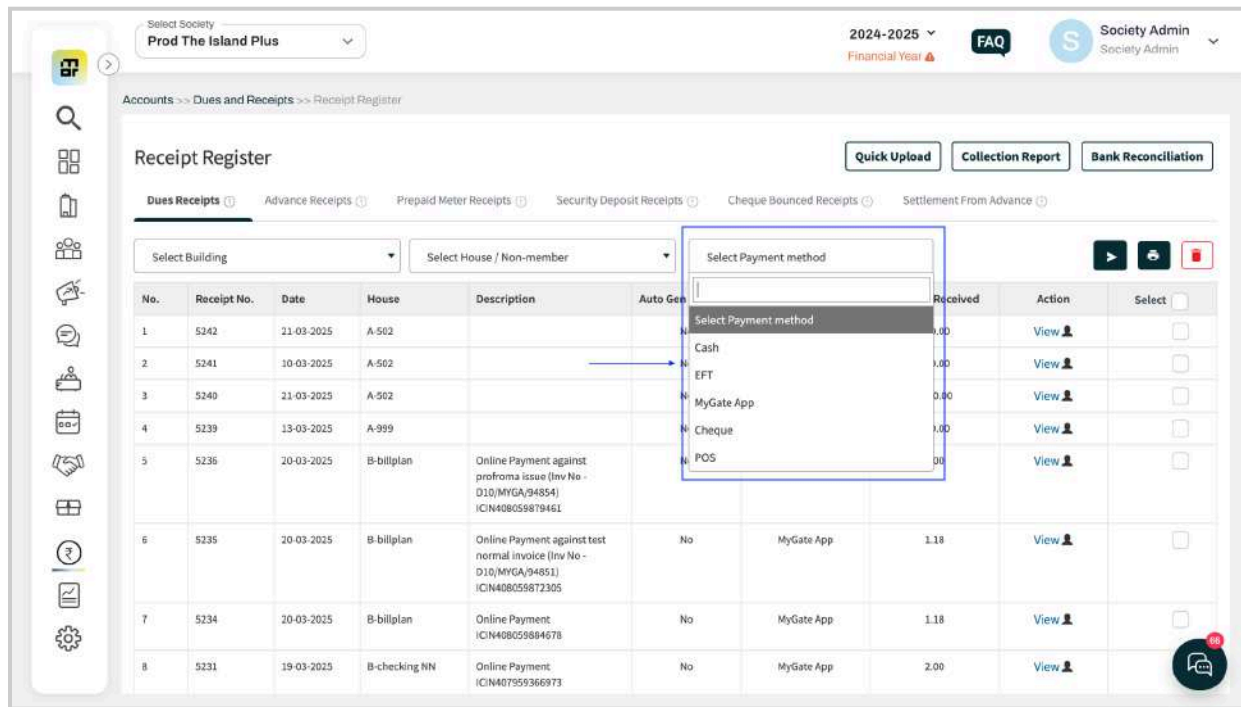
“Receipt Date” in Prepaid Recharge form

## 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.



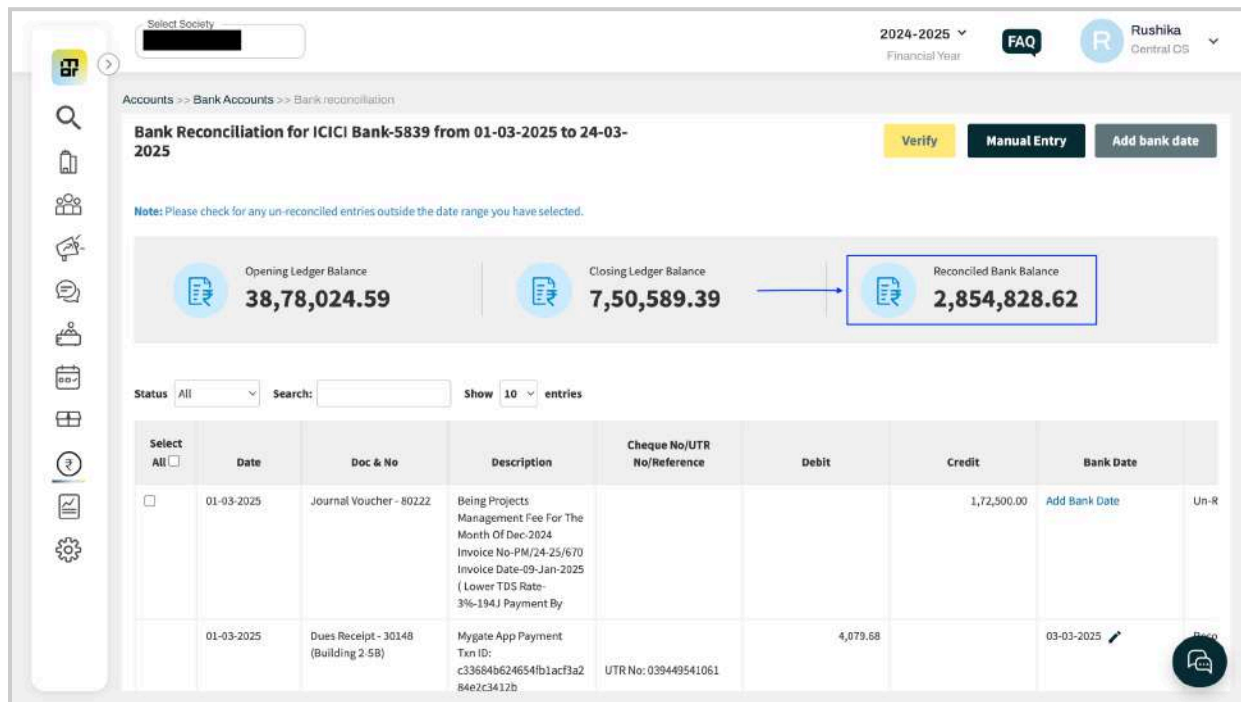
“Payment mode” filter on Receipt Register

## 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)**

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## 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.

The screenshot shows the 'Move In Move Out Requests' configuration page. The top navigation bar includes 'Select Society' (Prod MyGate dev), '2024-2025 Financial Year', 'FAQ', and 'Anlin Society Admin'. The breadcrumb trail is 'People Hub >> Residents >> Move In Move Out Requests'. The main content area has three sections: 'Vehicles', 'Pets', and 'Others'. Each section has a table with columns for 'Owner', 'Tenant', and 'Multi-Tenant'. The 'Others' section is highlighted with a red box and contains a 'Parking Number' field. There is an 'Add New' button at the bottom of the 'Others' section.

	Owner	Tenant	Multi-Tenant
<b>Vehicles</b>			
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Type (2 Wheeler, 4 Wheeler)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vehicle Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Photo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Pets</b>			
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Type (Dog, Cat, Others)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Photo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Others</b>			
Parking Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

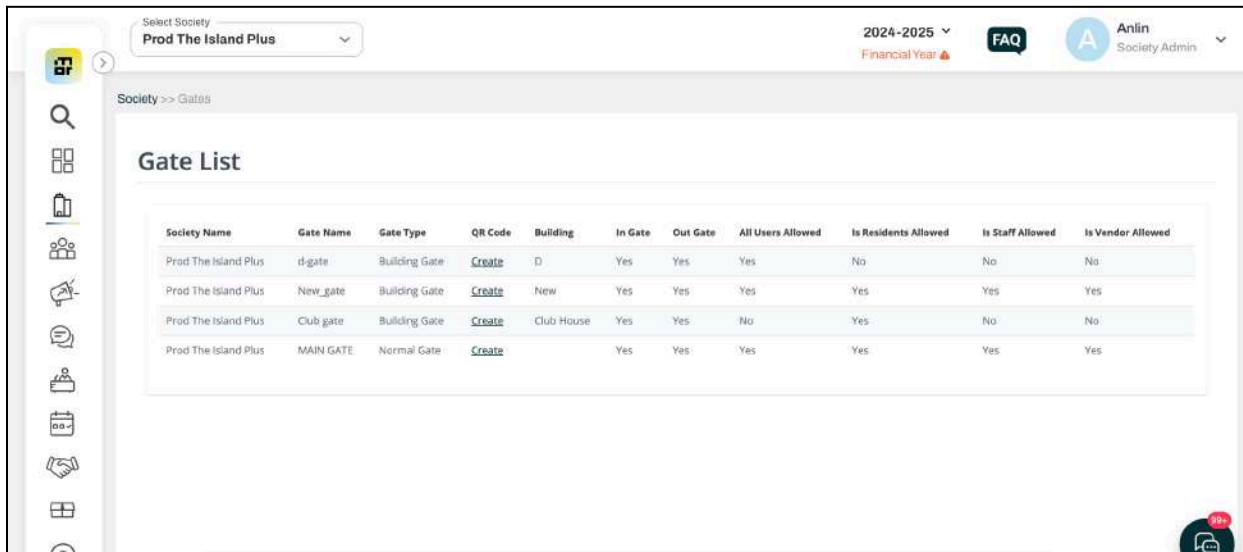
This will help the society secure the new tenant approvals and provide access only to the right tenants registering. This will ease the admins by avoiding any wrong access given to tenants or multi-tenants. The owners can also verify the rental and other related documents of their tenants from the app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



Society Name	Gate Name	Gate Type	QR Code	Building	In Gate	Out Gate	All Users Allowed	Is Residents Allowed	Is Staff Allowed	Is Vendor Allowed
Prod The Island Plus	d-gate	Building Gate	<a href="#">Create</a>	D	Yes	Yes	Yes	No	No	No
Prod The Island Plus	New_gate	Building Gate	<a href="#">Create</a>	New	Yes	Yes	Yes	Yes	Yes	Yes
Prod The Island Plus	Club_gate	Building Gate	<a href="#">Create</a>	Club House	Yes	Yes	No	Yes	No	No
Prod The Island Plus	MAIN GATE	Normal Gate	<a href="#">Create</a>		Yes	Yes	Yes	Yes	Yes	Yes

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.

Select Society  
Prod The Island Plus

2024-2025  
Financial Year

FAQ

Anlin  
Society Admin

Society >> Gates

### Gate List

Generate QR for New\_gate (Prod The Island Plus)

Latitude: 28.18801900 Longitude: 85.81215300 Range: 500

Note - To Enable QR Check IN, Please contact Mygate.

Create QR

Society Name	Gate Name	Gate Type	QR Code	Is Vendor Allowed
Prod The Island Plus				No
Prod The Island Plus				Yes
Prod The Island Plus				No
Prod The Island Plus				Yes

Select Society  
Prod MyGate dev

2024-2025  
Financial Year

FAQ

Anlin  
Society Admin

Society >> Gates

### Gate List

Society Name	Gate Name	Gate Type	QR Code	Is Residents Allowed	Is Staff Allowed	Is Vendor Allowed
Prod MyGate dev	HWAC Building	Building Gate		No	No	No
Prod MyGate dev	Test HWAC	Normal Gate		No	No	No
Prod MyGate dev	Clubhouse123	Building Gate	Create	Yes	Yes	Yes
Prod MyGate dev	TESTShield	Building Gate	Create	Yes	No	No
Prod MyGate dev	gate	Normal Gate	Create	No	No	No
Prod MyGate dev	MyGate Shield	Normal Gate		Yes	Yes	Yes
Prod MyGate dev	Club House Gate	Building Gate	Create	Yes	No	No
Prod MyGate dev	Mygate Business	Normal Gate	Create	Yes	Yes	Yes
Prod MyGate dev	Xg	Normal Gate	Create	Yes	Yes	Yes
Prod MyGate dev	Reception	Normal Gate	Create	No	No	No

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.



Select Society

Prod MyGate dev

2024-2025

Financial Year









FAQ

Anlin

Society Admin

Society >> Clafes

Gate List

Society Name	Gate Name	Gate Type	QR Code	Building	In Gate	Out Gate	All Users Allowed	Is Residents Allowed	Is Staff Allowed	Is Vendor Allowed
Prod MyGate dev	HWAC Building	Building Gate	 	H	Yes	Yes	No	No	No	No
Prod MyGate dev	Test HWAC	Normal Gate	 		Yes	Yes	No	No	No	No
Prod MyGate dev	Clubhouse123	Building Gate	<a href="#">Create</a>	Club house	Yes	Yes	No	Yes	Yes	Yes
Prod MyGate dev	TESTShield	Building Gate	 	Rashmi	Yes	Yes	No	Yes	No	No
Prod MyGate dev	gate	Normal Gate	<a href="#">Create</a>		Yes	Yes	Yes	No	No	No
Prod MyGate dev	MyGate Shield	Normal Gate	 		Yes	Yes	Yes	Yes	Yes	Yes
Prod MyGate dev	Club House Gate	Building Gate	<a href="#">Create</a>	Rain Drops	Yes	Yes	Yes	Yes	No	No
Prod MyGate dev	Mygate Business	Normal Gate	<a href="#">Create</a>		Yes	Yes	Yes	Yes	Yes	Yes
Prod MyGate dev	Xg	Normal Gate	<a href="#">Create</a>		Yes	Yes	Yes	Yes	Yes	Yes
Prod MyGate dev	Reception	Normal Gate	<a href="#">Create</a>		Yes	Yes	Yes	No	No	No

Time Spent Per Flat

Delivery / Courier, Grocery, Gas (Mins)

20

Cabs (Mins)

25

Tutor (Mins)

15

Guests (Mins)

30

Carpenter, Beautician, Others (Mins)

35

Snooze Interval For Alerts

Time between subsequent alerts (Mins)

1

Maximum Threshold For Overstay

Upper threshold (Hours)

1

## 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