ERP Dashboard Updates (Mar' 2025)

Amenity Booking setup updates for a better experience

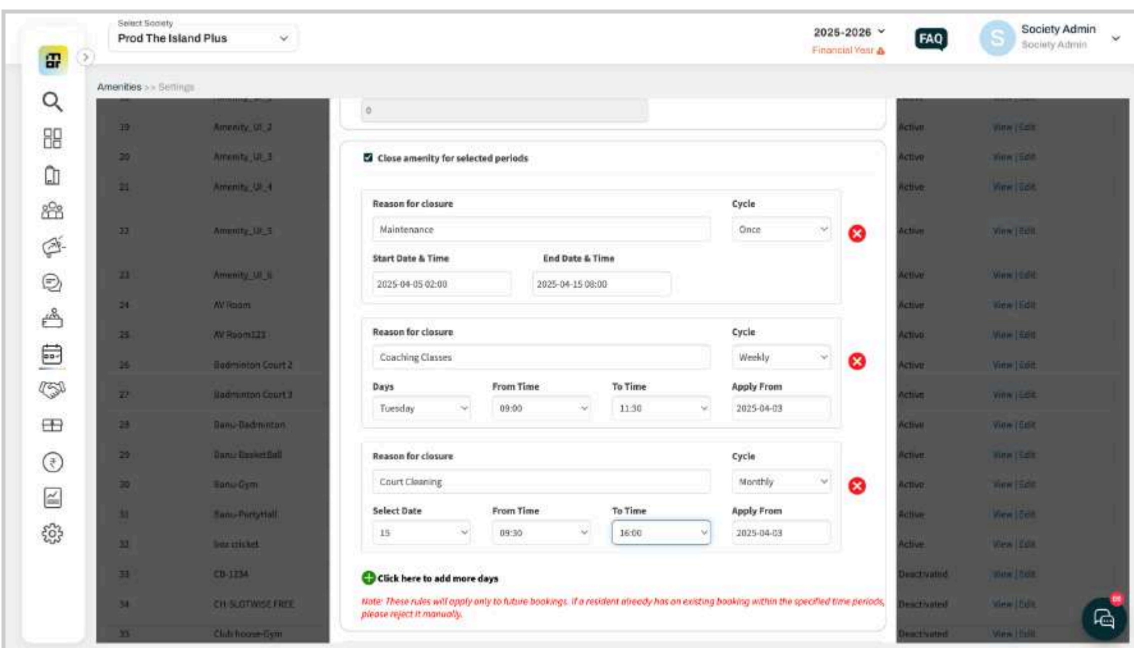
Path: Amenities >> Settings

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.

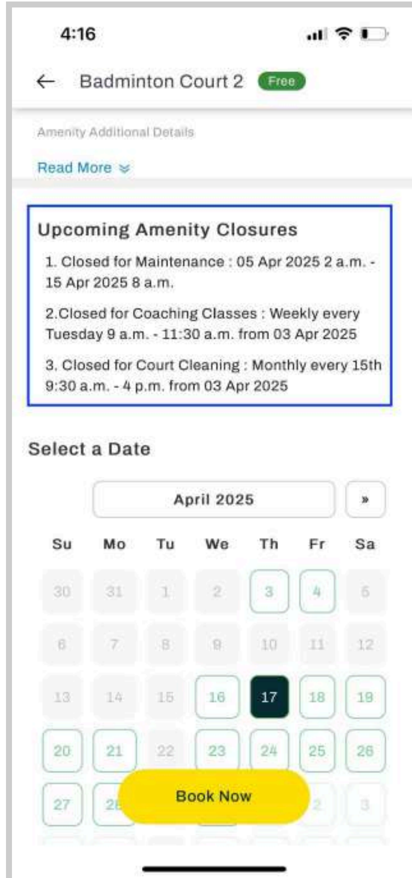
1. **Easy management of upcoming amenity closures**

   Previously, the "Mark as Closed for Maintenance" option allowed only a single closure period, limiting the flexibility for admins and facility managers. There was no option to schedule multiple or recurring closures for events like coaching classes or weekly/monthly maintenance.

   With this enhancement, admins can now set up multiple closure periods in advance, improving planning and communication. The resident app will also reflect these updates within the booking flow, keeping residents informed about the availability of the amenity.



Closures can be configured in the amenity edit form



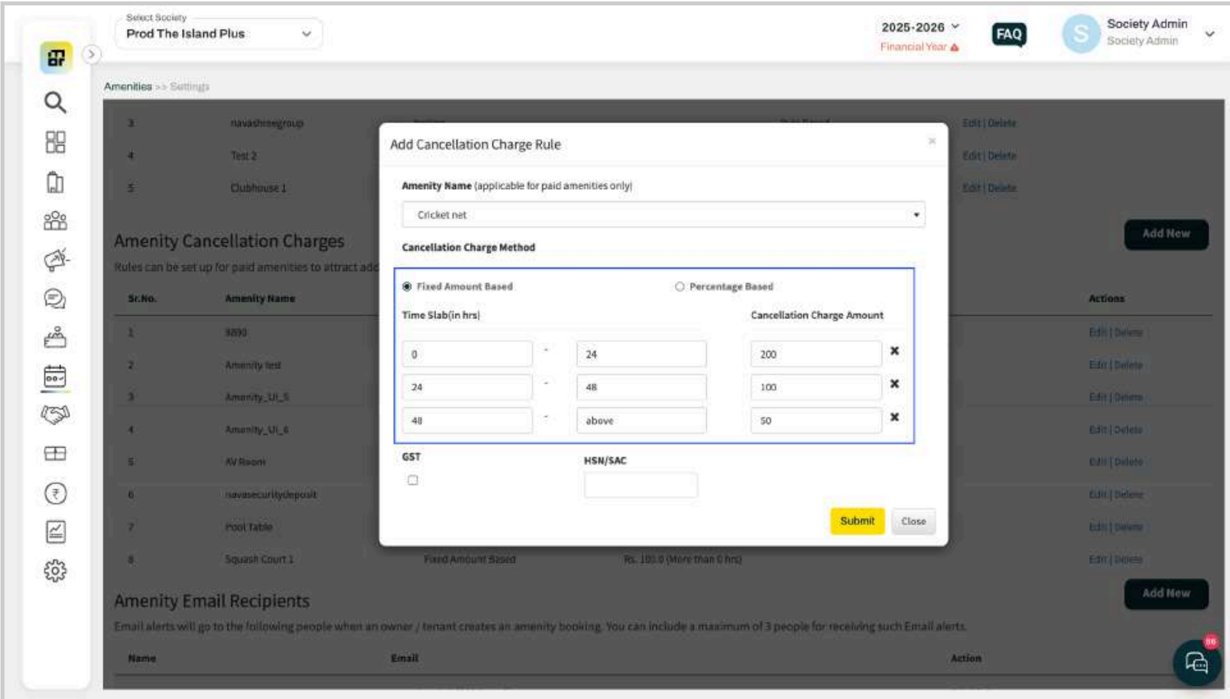
The next three closures displayed in the booking flow

2. Time-Based Amenity Cancellation Charges

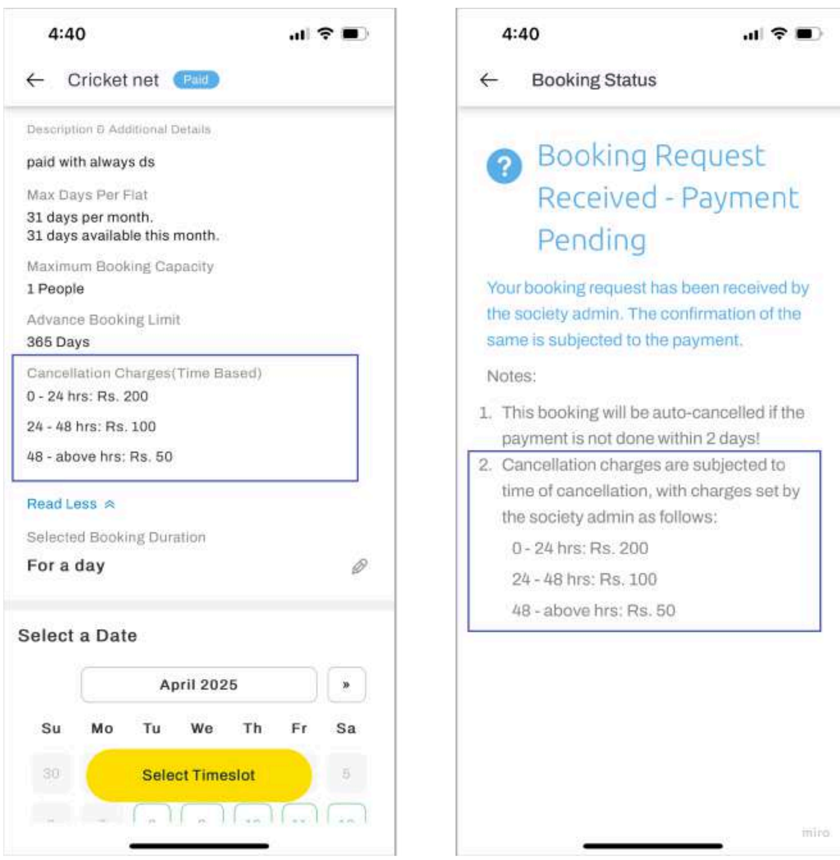
Previously, admins/facility managers could only set a fixed or percentage-based cancellation charge for paid amenity bookings, regardless of when the cancellation occurred. This lacked flexibility and didn't account for last-minute cancellations that impact amenity utilization.

With the new time-based cancellation rule, admins can now set different charges based on when a resident cancels. For example, cancellations made 48 hours in advance may have a lower fee, while those within 24 hours may incur a higher penalty. The rules can be applied to a specific amenity and will be updated accordingly on the resident app.

This update ensures a fairer cancellation policy and better refund management for communities.



Cancellation configured in amenity settings



Cancellation information in booking flow

Category-Level restriction for Helpdesk Managers

Path: Helpdesk >> Settings

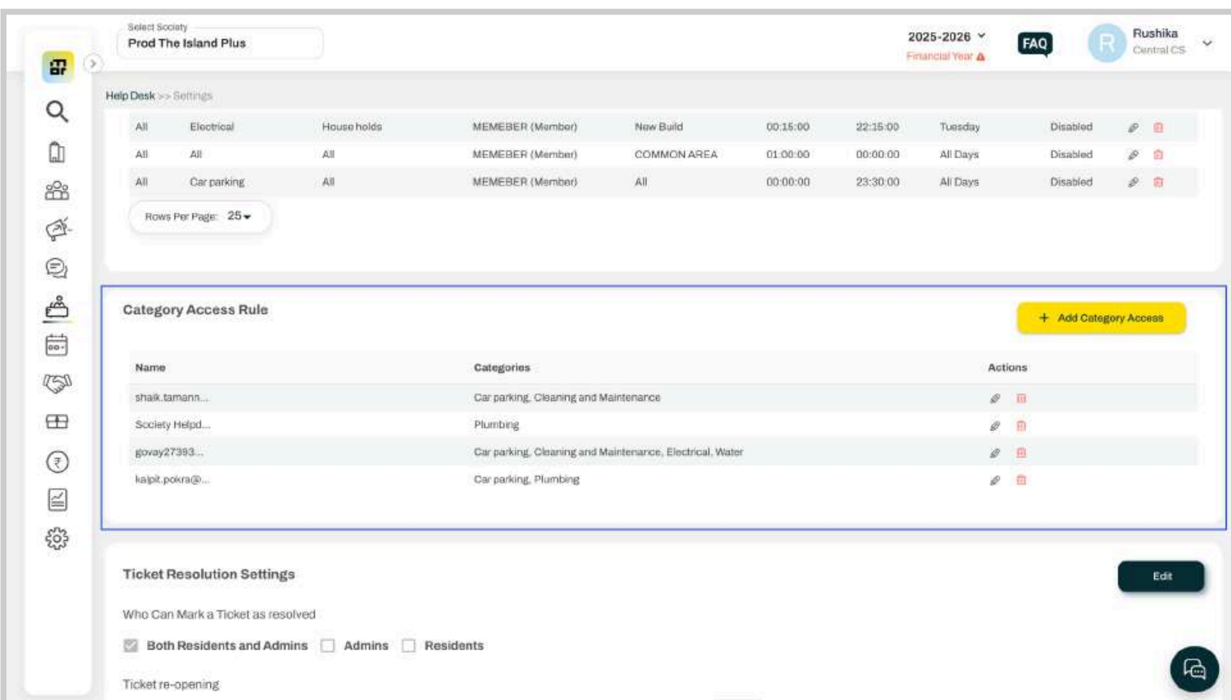
In large societies where multiple head technicians or managers are assigned specific categories, a new configuration tool has been introduced under Helpdesk settings.

Admins can now assign specific categories to individual head technicians or managers. Once configured, the helpdesk operator will have access and control limited to only those designated categories -

1. Head technicians/managers will only see tickets from the categories assigned to them on the dashboard.
2. They will be able to perform actions such as filtering, assigning staff, updating statuses, and adding internal notes only on the tickets within their category scope.
3. While creating a new ticket from the dashboard, they will only be able to do so for the categories assigned to them.

This provides the following benefits:

1. Improves operational efficiency
2. Helps reduce noise from unrelated tickets
3. Ensures focused handling on their respective category tickets



Category Access Rule in Helpdesk settings

Helpdesk <> Saarthi (Technician app) updates for better staff experience

The Saarthi App was recently integrated with the Helpdesk module, offering a dedicated interface for helpdesk staff to view and manage their assigned tickets. Staff can now mark tickets as 'Job Done' with proof of completion, creating a more streamlined and efficient system for ticket resolution.

New updates are being introduced to further enhance the app, equipping helpdesk staff with all necessary tools to perform their tasks effectively and reduce turnaround time for ticket closure.

1. INTERNAL - Saarthi 'Job Done' setting removed for all from Helpdesk Dashboard

As part of the controlled rollout of the Saarthi App, a setting was previously enabled only for societies where helpdesk staff had the Saarthi app installed. This allowed the "Job Done" status to appear as a filter option on the Helpdesk dashboard, ensuring that only eligible societies could access the new functionality.

The setting has now been removed across all societies, and the "Job Done" filter is available by default. Societies can now independently guide their helpdesk staff to install the Saarthi App and start using its features without any dependency on special configurations.

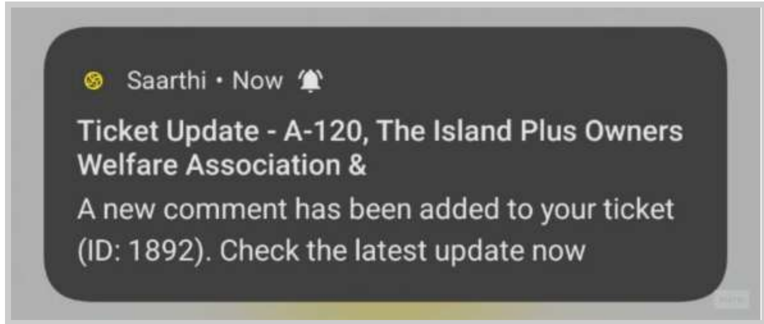
2. Push notifications on ticket actions made by helpdesk manager/society admin

Previously, helpdesk staff received push notifications only when a ticket was assigned to them. With this enhancement, staff will now be notified of all key ticket actions performed by the society admin, helpdesk manager, or the system, enabling quicker and more informed responses.

These push notifications will be triggered for the following actions:

1. When a resolved ticket is reopened, or a ticket is put on hold
2. When a 'Job Done' ticket is marked as resolved by the admin/manager
3. When any edits or comments are added to the ticket by the admin/manager
4. When a ticket is auto-escalated by the system

This update ensures better visibility and faster action from helpdesk staff.



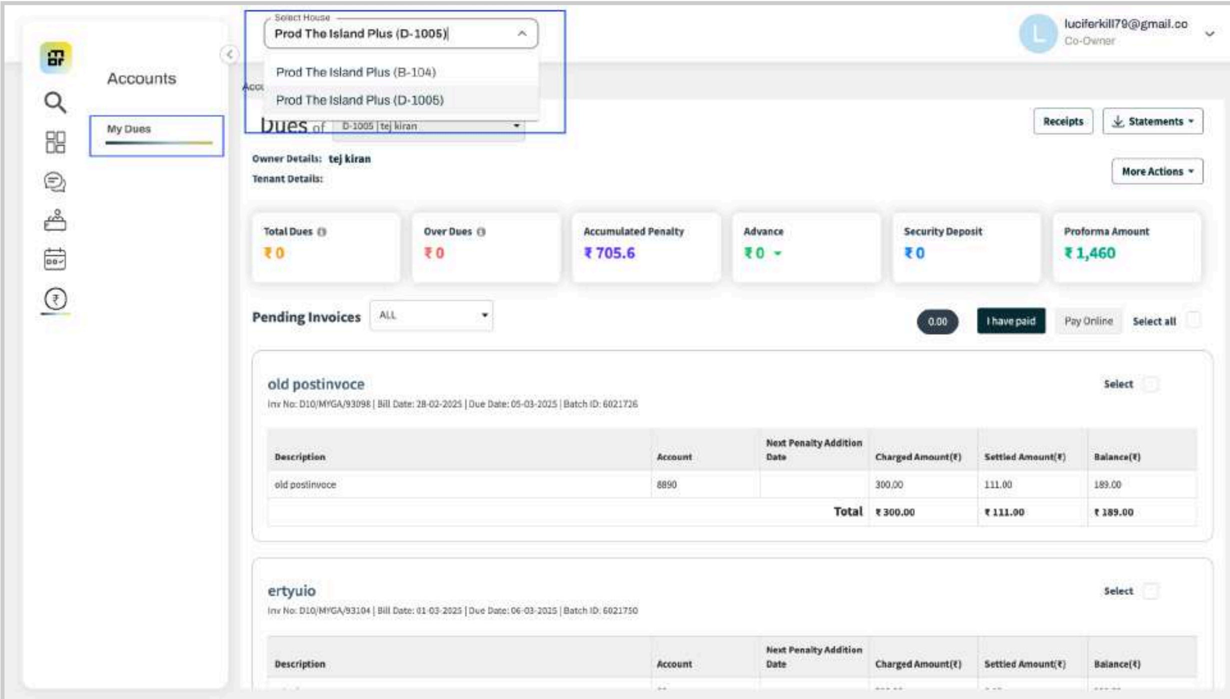
Push Notification for comments added by admin

Improvements in Resident Web Login

The resident web login has been enhanced to improve accessibility, user experience, and overall satisfaction—particularly for residents who do not use the Mygate mobile application. These updates aim to ensure that essential features are easily available and intuitive to navigate from the web interface.

Key Enhancements:

1. **Flat Switch Dropdown:**
   A new dropdown menu has been added to the top-right corner, allowing users to easily switch between their flats (in case they own or stay in multiple units). This enables flat-specific navigation and actions without needing to log in separately for each flat.
2. **Introduction of 'My Dues' Menu:**
   A dedicated 'My Dues' section has been added to the menu, redirecting users to their respective house dues page. Here, users can:
   a. View outstanding dues and select specific invoices to pay.
   b. Make payments directly from the web and access the complete house statement.
   c. View and download receipts for previously settled invoices.
3. **UI Improvements:**
   Several UI enhancements have been made to ensure a cleaner layout, improved readability, and a more seamless navigation experience for the resident.



Resident Web Login enhancements

Feedback based improvements to society invoicing

New Option to Print "Tax Invoice" or "Bill of Supply" on society invoices

Path: Accounts >> Invoicing >> Raise Invoices >> Create/Edit Template

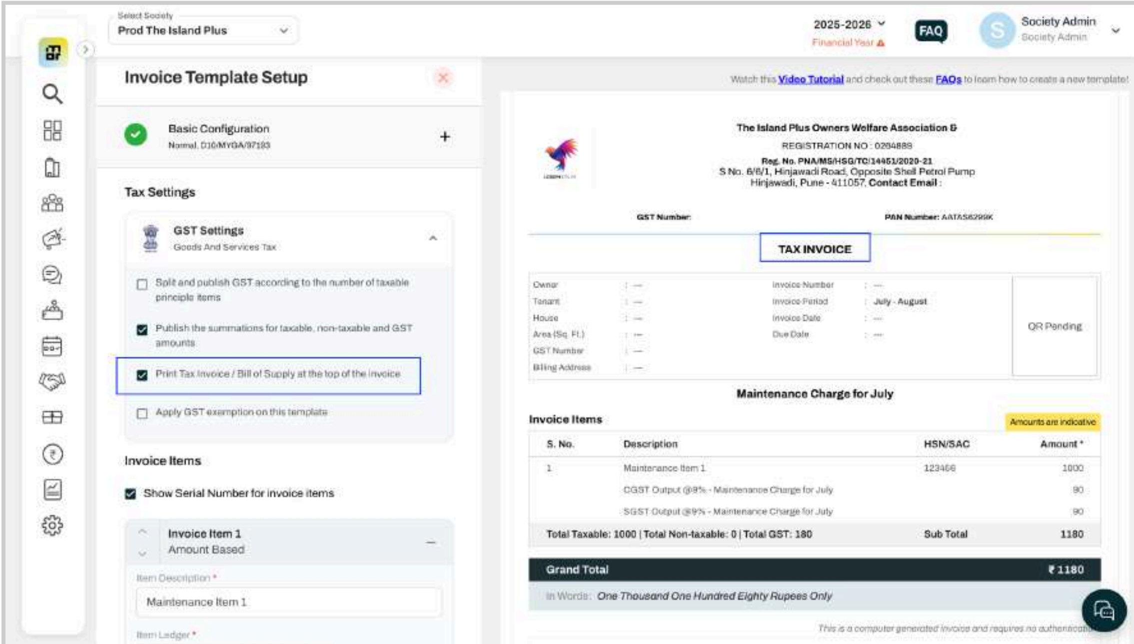
As part of compliance, society admins now have the choice to print "Tax Invoice" or "Bill of Supply" while creating invoice templates for batch generation.

The system automatically determines the appropriate title based on the nature of the charges in the invoice:

- If at least one taxable charge is present, the invoice will be titled "Tax Invoice".
- If all charge items are tax-exempt, the invoice will be titled "Bill of Supply".

This update provides the following benefits:

1. Better alignment with GST compliance requirements
2. Provides clear distinction between taxable and non-taxable invoices,
3. Improves transparency and accuracy in financial documentation.



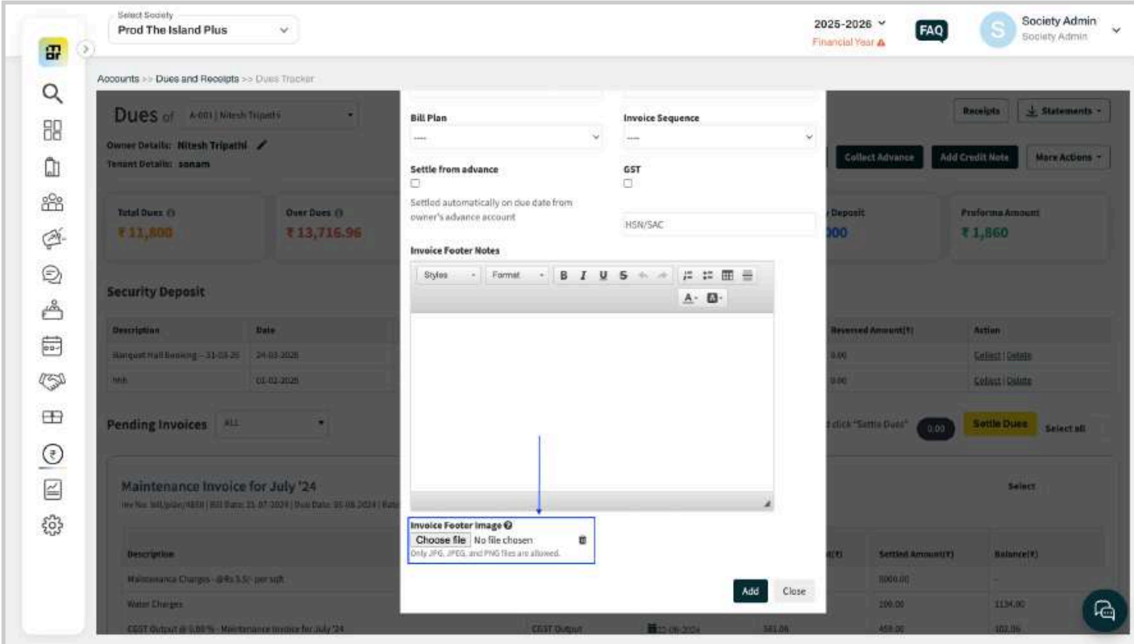
Option to print tax invoice or bill of supply on invoices

Option to add footer image while generating single-flat invoice

Path: Accounts >> Dues & Receipts >> Dues Tracker >> Add Invoice

Previously, the option to add a footer image was only available while creating invoice templates and generating invoices in batches. With this update, society admins can now add a footer image even while raising a single invoice for an individual flat.

This enhancement ensures consistency and communication across all invoices, whether generated in bulk or individually.



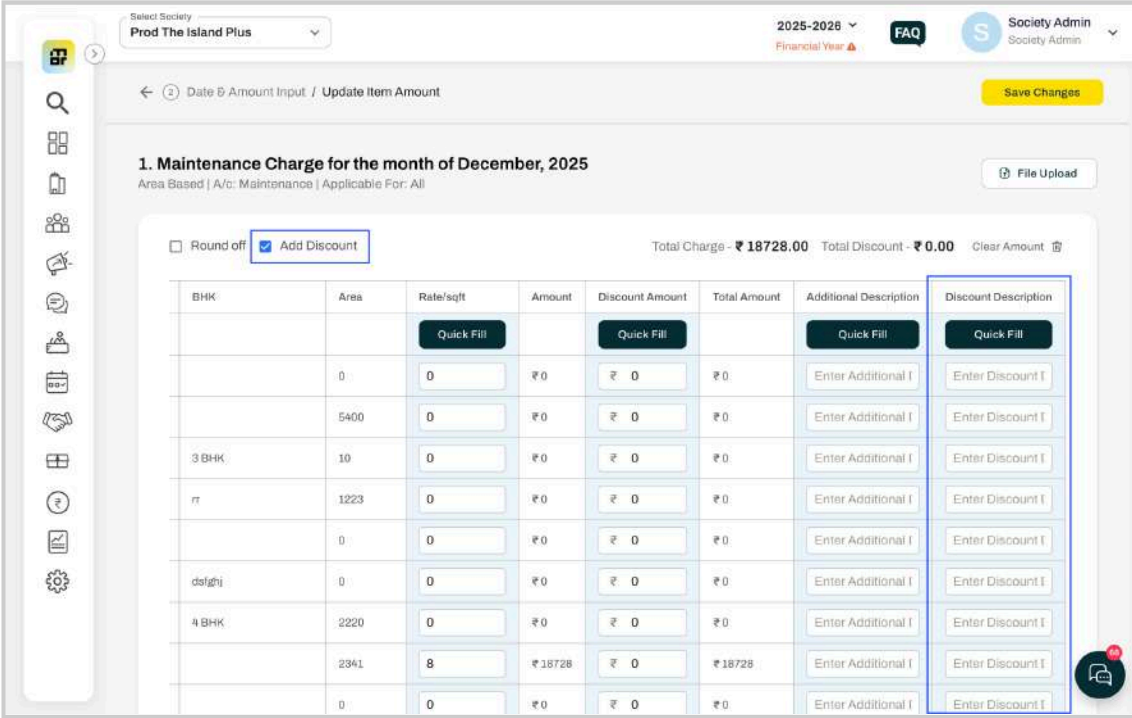
Option to add invoice footer image

Introducing 'Custom Description to Discount' during invoicing

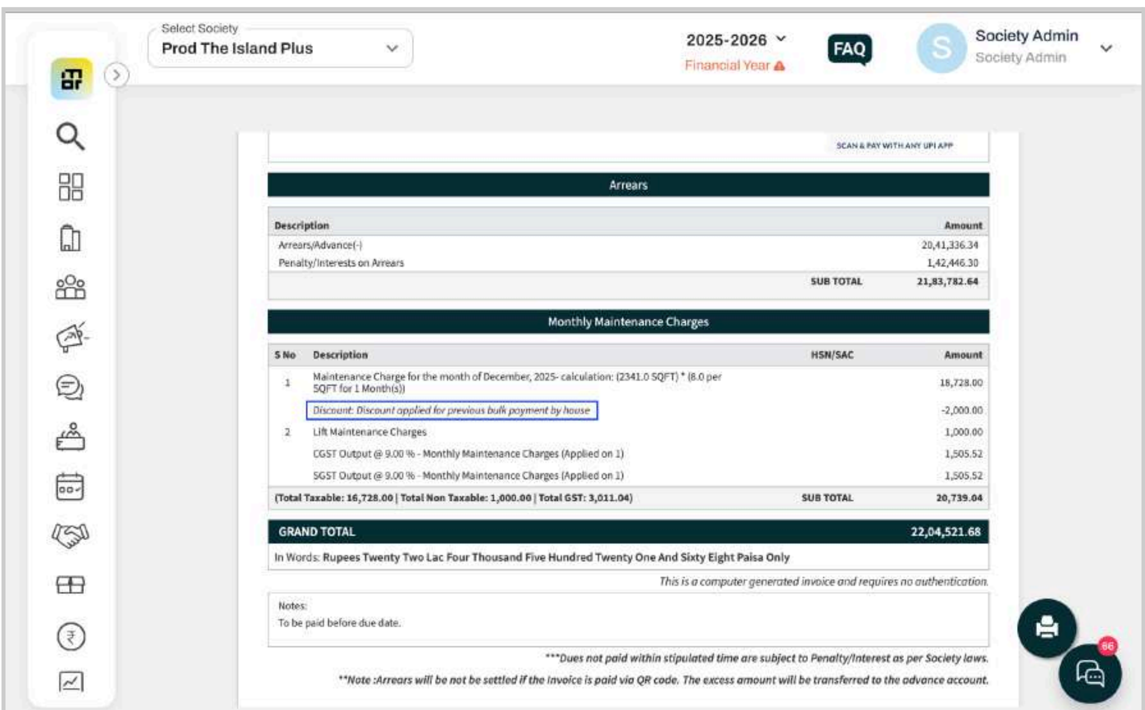
Path: Accounts >> Invoicing >> Raise Invoices >> Generate Invoice

Giving a discount during invoicing was already available as a feature before, however, without a custom description option it was difficult to communicate the exact reason for the discount to the residents.

Support for discount description has now been added to the new edit amount page and the upload sample files. The added description would now appear right below its concerned invoice item.



Discount description can be uploaded or added in bulk on the Edit Amount Page



Discount and its description in italics on invoice PDF

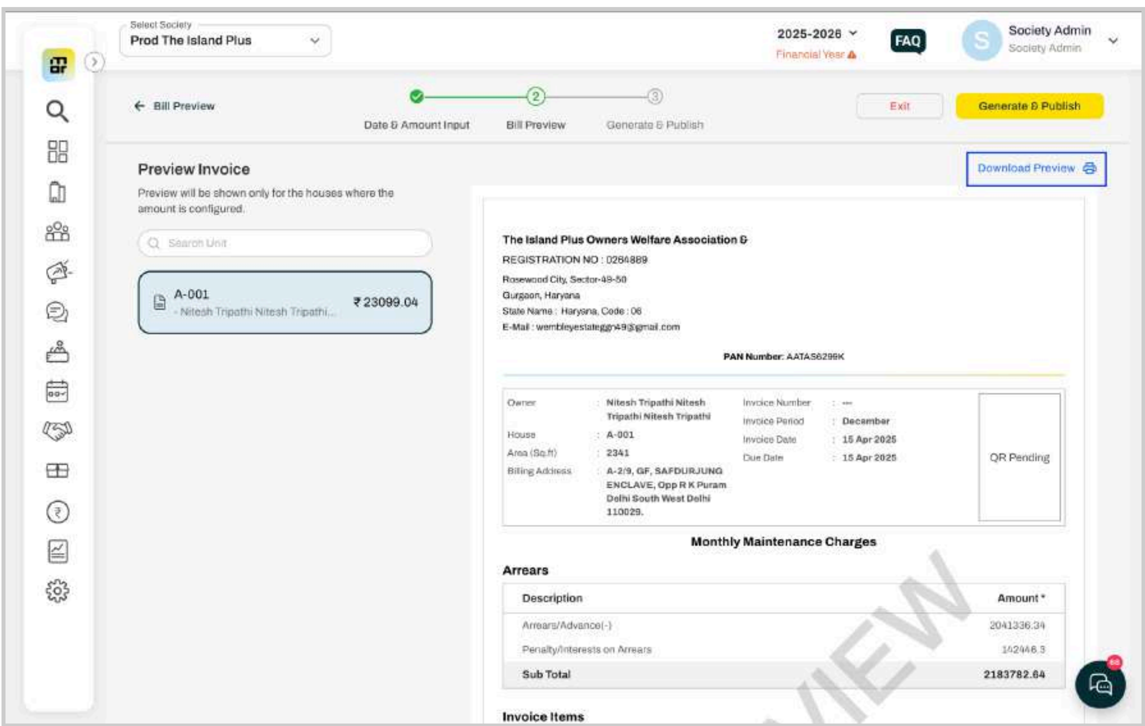
‘Download Preview’ before generation of actual invoices

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

Accountants are often required to share the PDF file of the invoice preview to the committee before the actual generation process. The treasurer and other members review a few samples (covering different use cases of invoice generation within the society) before giving their approval to the accountant.

To support the above process, ‘Download Preview’ has now been added to the new invoice generation flow on the ‘Bill Preview’ milestone. When clicked, it downloads the PDF of the currently selected house/non-member by opening a new tab.

*Note - Society admin may have to ensure that mygate.com has been excluded from the pop-up blocker list on their browsers.



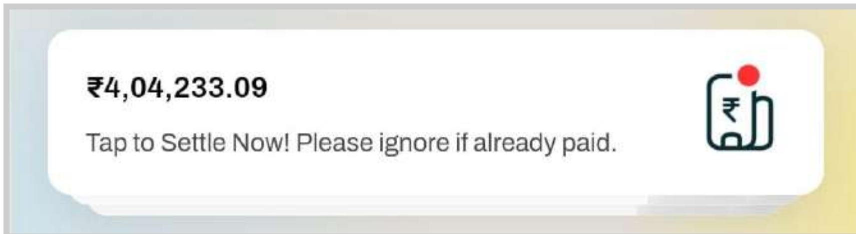
Download Preview button on ‘Bill Preview’ milestone

Invoice Spotlight now presented with richer information

Path: Resident App >> Home Page

Invoice spotlight card on the app home page is very useful for residents to know their current dues and pay the corresponding invoices in one step. Two new details have been added to bring more clarity of information to the resident -

1. New invoice count (covering bills within their due dates)
2. “Please ignore if already paid!" added to the messaging to account for delays in spotlight update



Improved details on the spotlight card

All transactions covered with Auto-reconciliation on Mygate

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

Society admins can now automatically reconcile transactions recorded through **General Receipts, General Payments, and Cash/Bank Transfers**.

With this enhancement, the system will match these entries against bank transactions during the reconciliation process, reducing the need for manual matching and improving accuracy. This significantly streamlines the reconciliation workflow, saves time for auditors, and ensures cleaner, more consistent financial records.

Complete accounting coverage of Tally Export on Mygate

Path: Accounts >> Tally Export

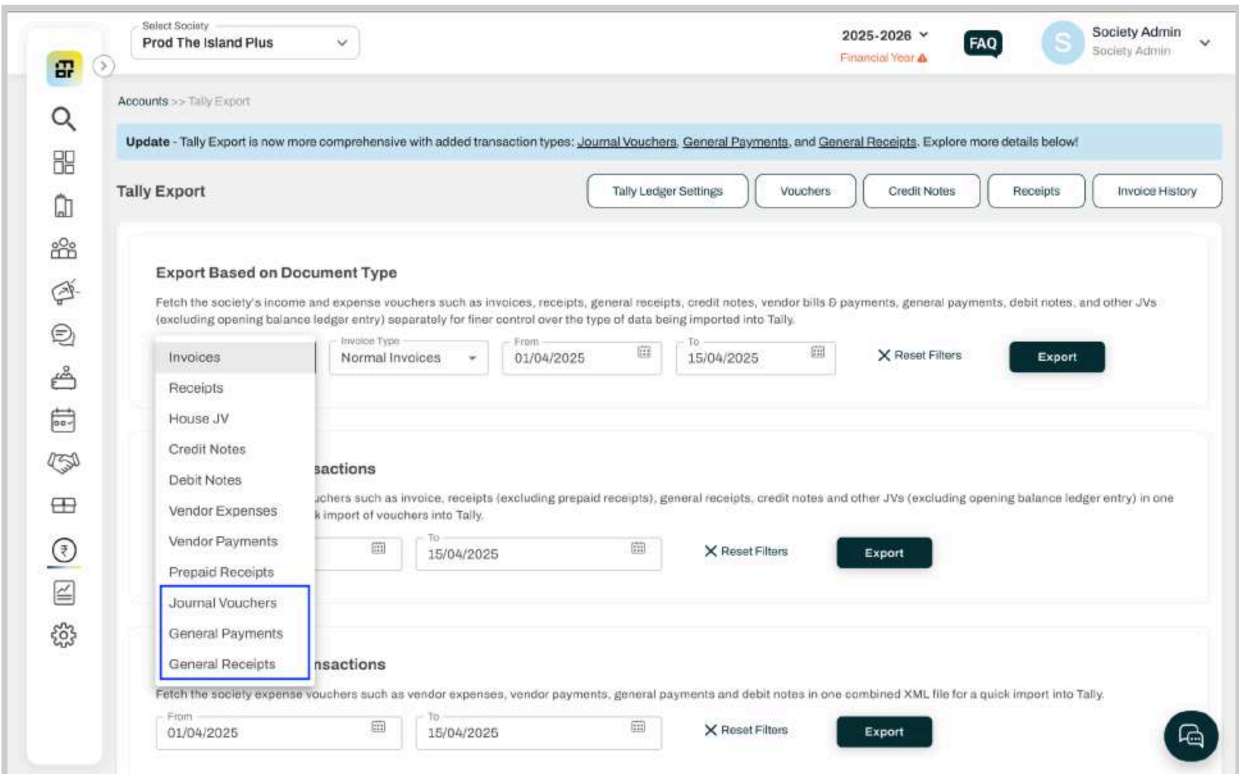
As part of improving compatibility with Tally and streamlining financial workflows, the following updates have been made to the Tally Export module:

1. **Journal Vouchers (JV)**

   Currently, all Journal Vouchers (JVs) linked to house ledgers are included in the download. With this update, JVs tagged with the Opening Balance ledger—whether created automatically or manually—will be excluded from the export. This ensures only relevant transaction entries are downloaded, simplifying data handling and preventing duplication of opening balance entries in accounting systems.

2. **General Payments & Receipts (Petty expense and income)**

A new toggle has been added in the Tally Export module to allow exporting all General Payments & Receipts recorded in MyGate. These will be downloaded with the voucher type set as "Receipt" & "Payment" respectively in Tally, ensuring accurate classification during import.

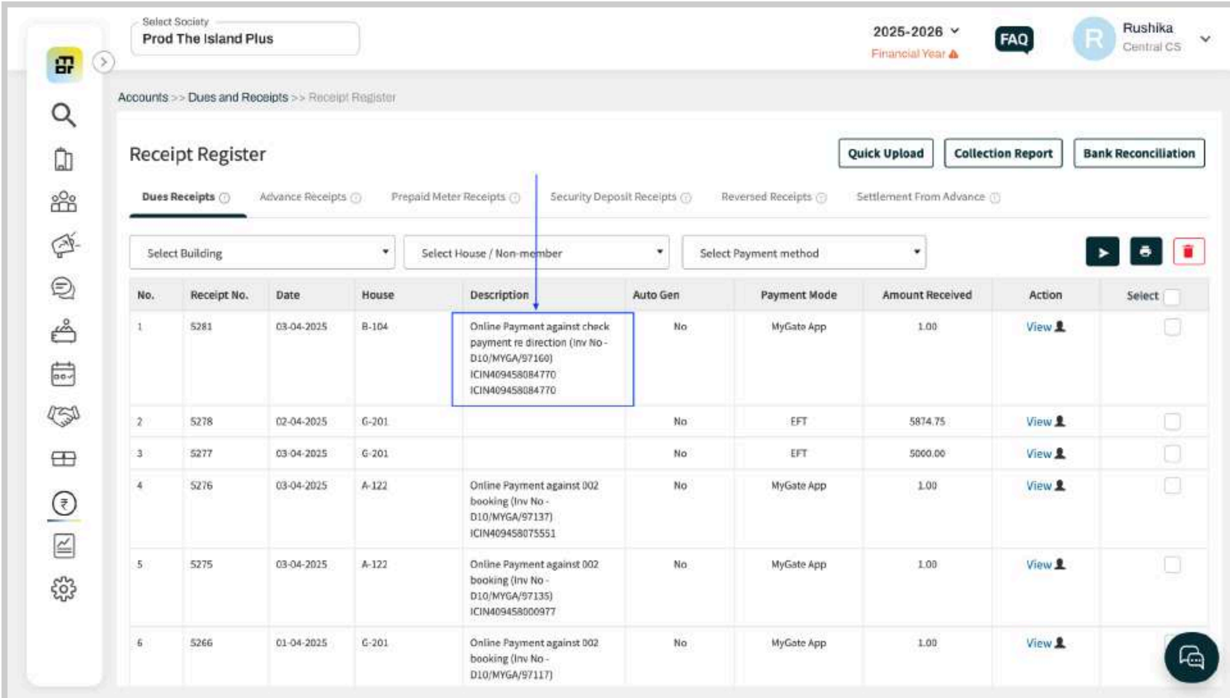


JV, GP and GR modules added to Tally Export

Settled invoice reference in Mygate app receipt description

To provide better clarity and transparency for residents and admins, receipt descriptions for payments made against invoices through the MyGate app have been enhanced, the receipt description will now include the invoice description and invoice number for each payment made by the residents.

If a combined payment is made against multiple invoices, the description will also include the count of bills for better clarity.



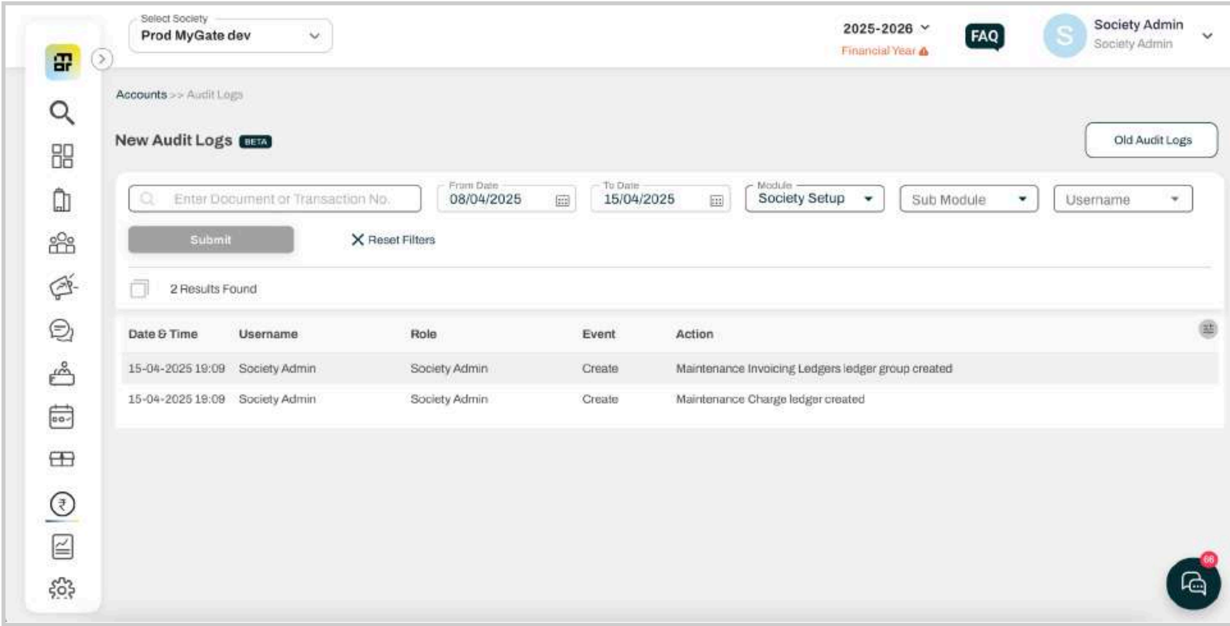
More modules now covered in the New Audit Logs

Path: Accounts >> Audit Logs

New Audit Logs were launched in Nov '24 as Beta, covering the top 90% modules by usage.

Since then we have been improving the report every month to cover more cases in the already released modules and also accommodate other lesser used modules. Support for the following items were added in March -

1. Penalty Deletion from house dues page
2. Ledger and Ledger Group within Chart of Accounts

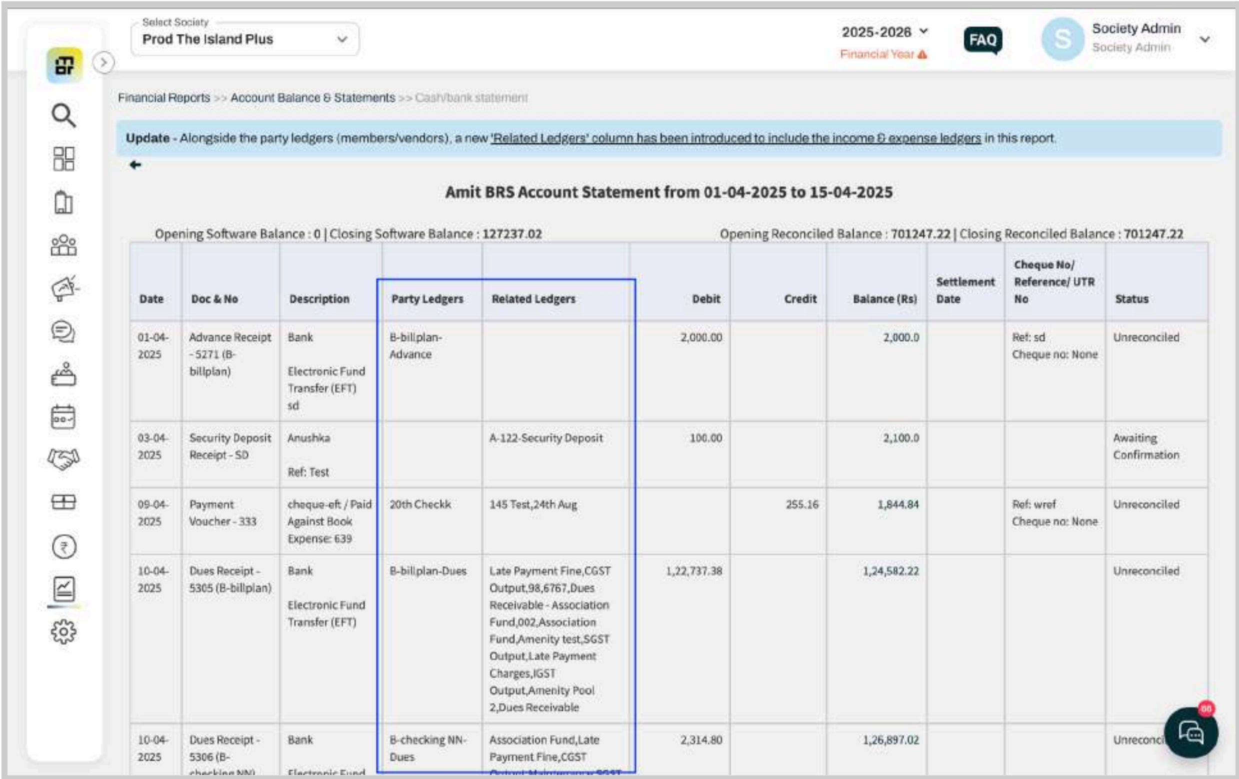


Related income and expense ledgers now available in cash/bank statement

Path: Financial Reports >> Account Balance & Statements >> Cash/Bank Statement

The Cash/Bank Statement is a key report that provides a consolidated view of all transactions for a bank account in one place. It helps in validating entries recorded in the software and checking their reconciliation status. In addition to the date, amount, and other transaction details, the report previously also included the party involved—whether a member, non-member, or vendor.

To enhance the capabilities of this report, a new **Related Ledgers** column has been added. This captures the associated income, expense, GST, or TDS ledgers involved in each transaction. Additionally, the Excel download of this report has been moved to an asynchronous process (available in the Download History section) to eliminate the risk of failure when handling large volumes of accounting data.



Related Party and Related Ledgers in Cash/Bank Statement

Additional Updates

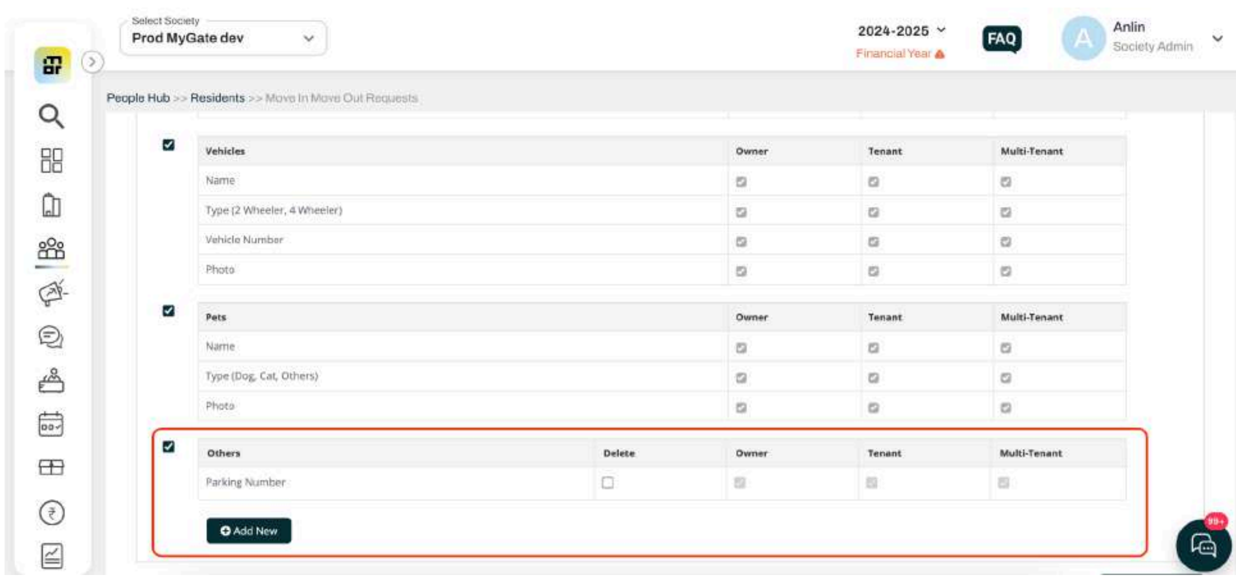
- Parking spots listed by residents on the app will now display the flat number of the resident offering the spot, ensuring better transparency for potential renters.
- Society admins can now book paid amenities from the dashboard using the “Pay from House Advance” option at checkout, allowing seamless deductions from the resident’s advance balance.
- Admins can now manage site name, logo, email logo, and currency via the Site Settings in Settings menu.
- Member and non-member dues receivables are now separately shown in the balance sheet for better clarity.
- Vendor module now includes fields to add contract details and vendor expiry date while creating a vendor.
- New Receipt form -
  - Sizes of the description and reference fields have been adjusted to allow the former to have longer inputs directly visible to the users.
  - Also, description and reference fields have been reinstated for the Settle from previous advance flow.

Security Dashboard Updates (March 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.

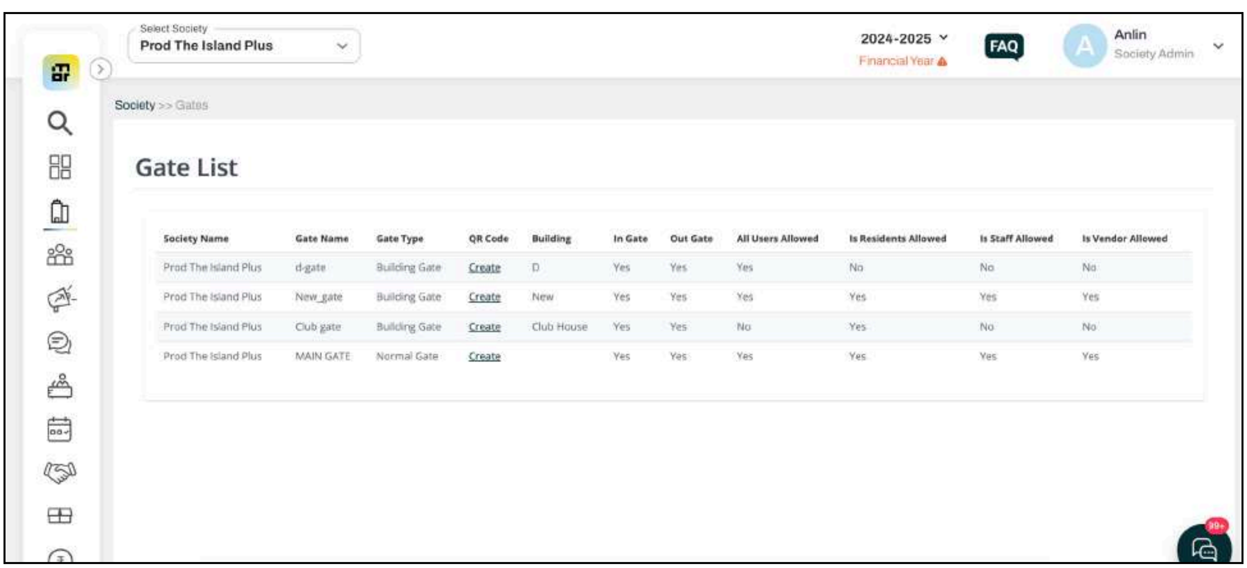
This will help the society secure the new tenant approvals and provide access only to the right tenants registering. This will ease the admins by avoiding any wrong access given to tenants or multi-tenants. The owners can also verify the rental and other related documents of their tenants from the app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

QR Generation for Society Admins

Path: Society >> Gates

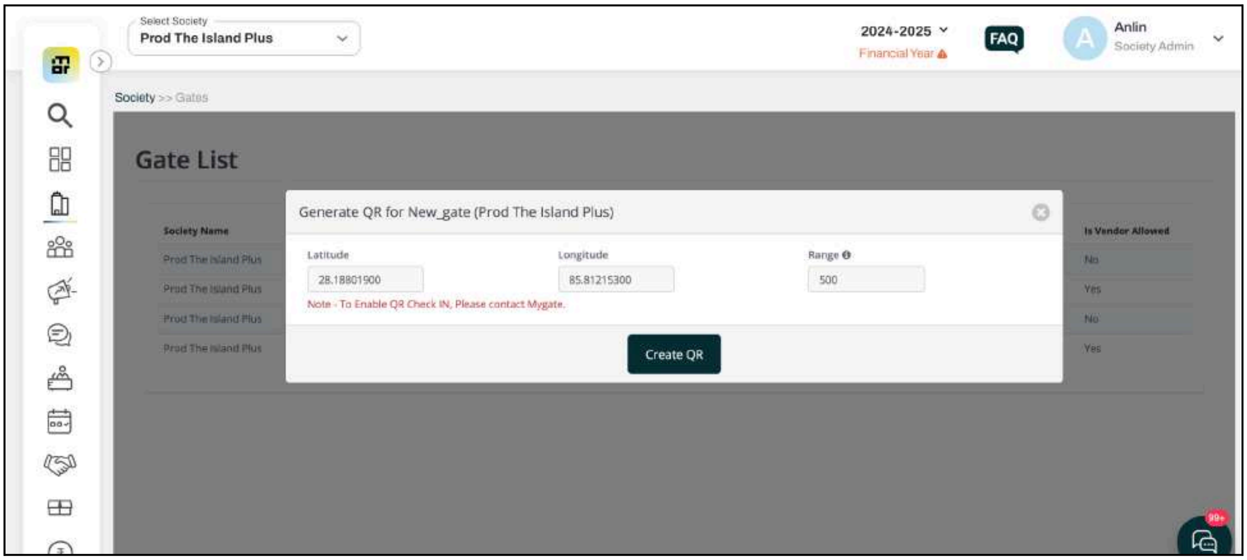
The QR-based check-in aims to reduce the time spent waiting at the gate. This will allow visitors to scan the QR, enter their details, and submit them for resident approval which saves the guard's time for entering the details of every visitor and would require the guard to just 'allow in' the visitor 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.

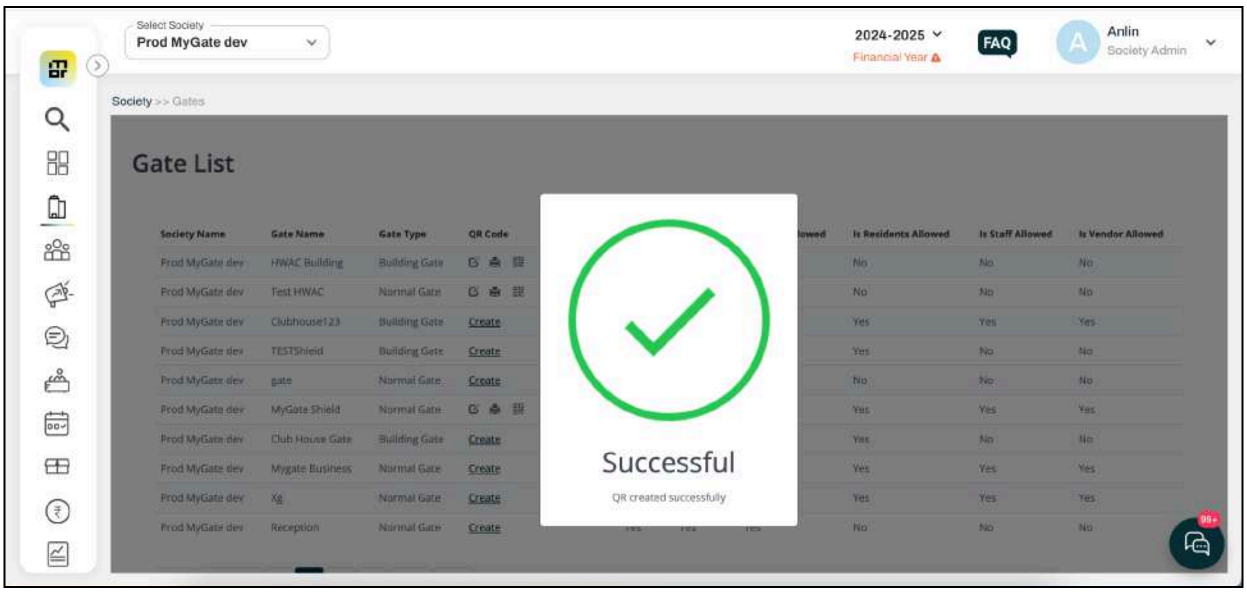
Click on Society >> Gates >> Click on 'Create' in the QR code column against the gate; the QR needs to be generated.



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	Create	D	Yes	Yes	Yes	No	No	No
Prod The Island Plus	New_gate	Building Gate	Create	New	Yes	Yes	Yes	Yes	Yes	Yes
Prod The Island Plus	Club gate	Building Gate	Create	Club House	Yes	Yes	No	Yes	No	No
Prod The Island Plus	MAIN GATE	Normal Gate	Create		Yes	Yes	Yes	Yes	Yes	Yes

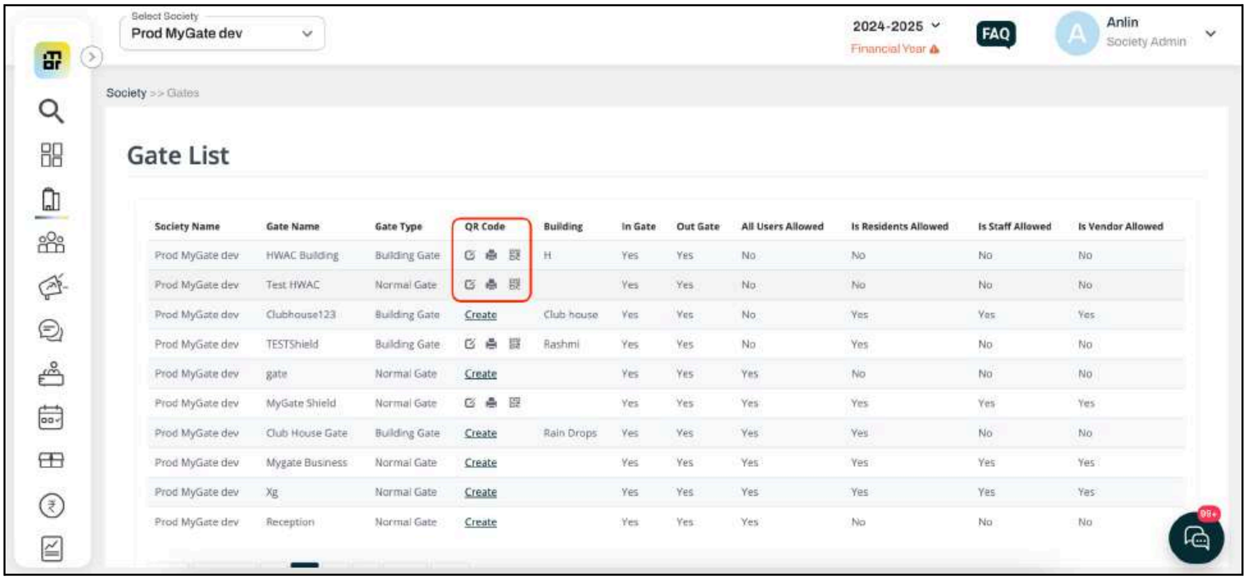
Once clicked, a pop-up showing the current society Lat-Long and the range for QR verification will be displayed. The admin can change the range if required (in meters). Click on 'Create QR' seen in the pop-up displayed, and you will receive a success message once the QR is created. The QR has now been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





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

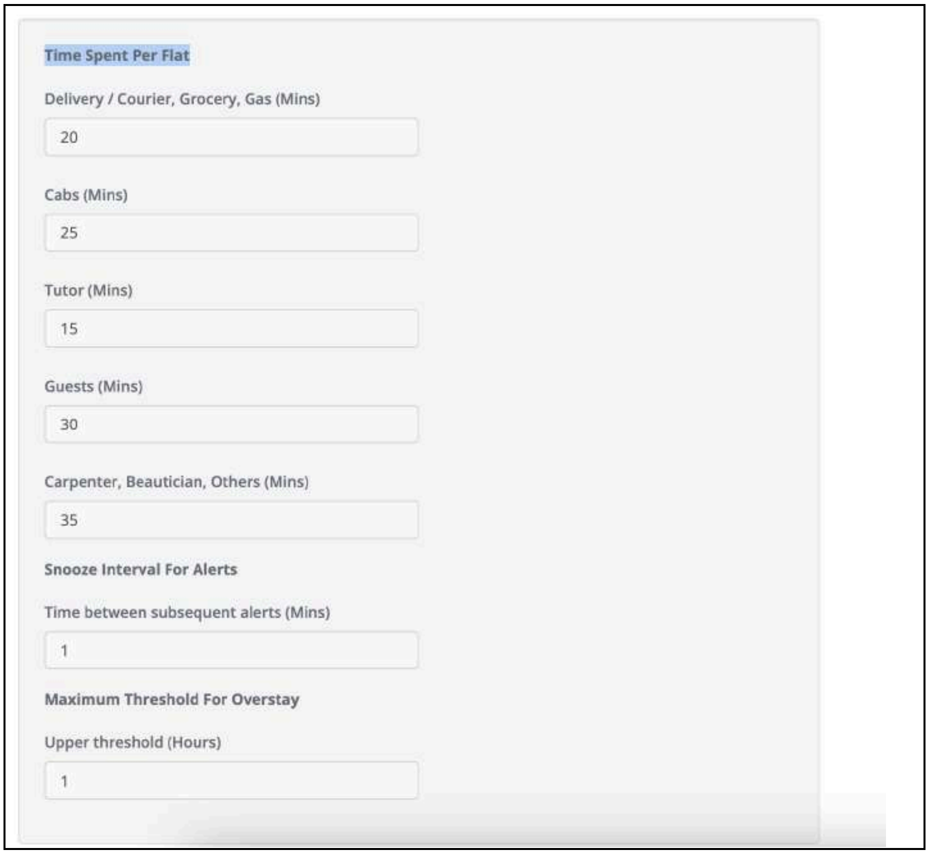
- Click on the 'Print' icon to print the QR code
- Click on the 'QR' icon for preview
- Click on the 'Edit' icon to edit the QR code and update it.



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. Society Setting - Resident name visibility in the guard app
2. Society Management setting access to CAM role
3. Stable Umbrella - Inactive User Sync
4. 8. Collect reason for viewing resident's contact details in 'Resident List'
5. 9. MacD - Device Onboarding & Club Gate Report Enhancements
6. 10. Access Logs report for Society Admins
7. 11. Zoho Integration for Central Support Team
8. 12. Society Setting - Enable/Disable Amenity Smart Access