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

Path: Dashboard >> Helpdesk >> Settings >> Saarthi Settings

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 have been 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. Restrict staff comments' visibility for residents on Mygate App*

A new setting has been introduced under *Helpdesk >> Settings >> Saarthi Settings*, which allows society admins to restrict the visibility of comments made by helpdesk staff through the Saarthi app.

Once enabled, comments added by staff on tickets assigned to them will be visible only to the society admins and helpdesk managers on the dashboard. Residents will not be able to view these staff comments on the app. This feature is useful when plumbing or electrical staff are not adept with typing in English or their comments are used for internal coordinations only.

* This setting is available to Mygate support team only



2. OTP based ticket resolution by staff through Saarthi App

Helpdesk staff can now directly resolve tickets through their Saarthi app, using an OTP-based confirmation from the resident who raised the ticket. When a helpdesk ticket (unit-level or community-level) is created, an OTP is automatically generated and made available to the residents (of the units that) on both the ticket listing and detail pages within the app.

After the staff visits and marks the ticket as Job Done, an option is provided to resolve the ticket and the ticket is resolved once the OTP is verified. This enhances transparency and accountability in the resolution process.

This is a setting-based feature that can be enabled from the Dashboard by navigating to: *Helpdesk* >> *Settings* >> *Sαarthi Settings*. This provides the following benefits:

- 1. Streamlines the ticket resolution process by reducing dependency on helpdesk managers to confirm closures with residents.
- 2. Improves resolution time and overall operational efficiency.
- 3. Adds a layer of resident verification, enhancing trust and clarity in service delivery.
- * This setting is available to society admins

II Com			Financial Year 🔺	Society Admin
ייי 19 10	elp Desk >> Settings (Note - When enabled, the resident's conta Enable Email Notifications Residents Staff S Admin	ct details on a helpdesk ticket can be unmasked.)		
} 	Note: When enabled, automated emails or	n Helpdesk will be turned on.)		
1	Enable OTP based ticket resolution (Note: When enabled, staff (eg. plumber, el	n by staff lectrician etc) can resolve tickets on Saarthi app using the 4 digit (OTP provided by the resident.)	
	Restrict visibility of staff comments (Note: When enabled, staff (eg. plumber, el)	s to residents. ectrician etc) comments on Saarthi will only be visible to admin/m	nanager.)	
3	Helpdesk Email Recipient			+ Add Email Recipient
)	Name	Email		Actions
)	Nitesh	nitesh.tripathi@mygate.in		0 1
	Roshini	roshini.gr@mygate.in		0 1

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Nevel Office all one flat have 1 5 4 3	3000	Ondertoop II. Noncoular	Kindly ask the resident for the OTP is resolve this complaint.	Cince relatived, the tablet will be removed from your complaint bring page
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Amenity Booking setup updates for a better experience

Path: Dashboard >> 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. Option to set monthly slot limit for a specific amenity

To further enhance fairness and flexibility in amenity bookings, a new restriction setting — "Maximum slots in a month per flat" — has been introduced. This complements the existing settings where admins could limit amenity usage based on:

- Maximum days in a month per flat
- Maximum slots in a day per flat

Previously, both these settings could be used together to ensure that residents do not overbook shared amenities. With the new update, admins can now choose between "maximum days in a month" or "maximum slots in a month" — depending on the specific amenity or community need. These cannot be applied simultaneously.

For example, if a flat is allowed 20 slots per month and 4 slots per day, the household could use all 20 slots in as few as 5 days (4 slots/day) or spread them out over as many as 20 days (1 slot/day). This provides greater booking flexibility while maintaining overall fairness. This provides the following benefits:

- 1. Gives residents the flexibility to choose any dates in the month, without being restricted by previously used booking days.
- 2. Encourages optimal use of amenity time slots without exceeding overall monthly quotas.

.	Prod The	y Island Plus 🛛 🗸 🗸	3	2025-2026 ¥ Financial Year 🛦	FAQ Society Admin ~
Q	Amenities >> Se	itings ime-based cancellation cl	harges with higher penalties for last-minute cancella	tions. Go to the 'Amenity Cancellation Charges' section to k	now more!
	23	Amenity_UL6			View (Edit)
۵	25	AV Room	Maximum Advance Booking Time*	Enter the number of hours	View Edit
<u>e</u> 2e	25	AV Room123	90 Days 00:00 v Onward	0 Hours	(View (Edit)
Ø-	28	Badminton Cour	Days Maximun ✓ Slots in a Month per flat*	Maximum Slot bookings per day per flat.	View (Edit
Ð	27	Badminton Cour	s	2	view [Edit
ß			Resident Cool Down Period (in minutes)	Always available (Daily) 🗍	
<u>⊢</u>	24	Banu-Badmintor	0 Mi	nutes	Vina (Edit
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150	30	Banu Gym	Amenity Cool Off Period (in minutes) (()	Comment Mandatory	view (Edit
89	34.1	Banu Partykull	D Mi	nutes	(Miew) Edite:
(7)	32	bar cricket			View Edit
2	33	CE-1234			and VestEdt
-04	36	CH-SLOTWISE FR	Residents should declare companions	Display resident details for booked amenity slots	rated View (Edit
503	35](Club house Gym			ated View [Edit)
	36	00000000	Enable terms and conditions Terms and Conditions		View (Dit

3. Allows admins to tailor booking policies based on usage trends or amenity availability.

Penalty/Interest calculation details on penalty invoice footer notes

Accumulated Penalty (provisional) is settled after payment is made by a resident and gets automatically converted to a tax invoice. These penalty invoices will, from now onwards, clearly display a summary of the penalty calculated in its footer section.

The table provides the following key details:

- 1. Source Invoice No. (on which the penalty was applied)
- 2. Batch ID (to which the source invoice belonged to)
- 3. Fine Period (start to end date of penalty application)
- 4. Count (Number of times penalty was applied during the Fine Period)
- 5. Principal Amount, GST Amount, Total Amount

This enhancement improves transparency and helps residents better understand the penalty charges associated with their payments.

	0	Samma ARDEN /	ASSOCIATION PORTING	ON OF APARTME using Society Ltd	NT OWNERS	# mygate
	GST Nun	ber: 34AACCC1596	Q002	Pi	AN Number: AATAS6299K	
Owner	Roshini			Invoice Number	: \$7/19-20/236176	
House	:0-0			Invoice Date	: 15 Dec 2024	
Area (Sq.ft)	1			Due Date	: 15 Dec 2024	
Owner Address	1					
		Tax Invoice	- Late Paym	nent Penalty (- 15-	12-24)	
Description					HSN/SAC	Amount
Penalty generated of Invoice : \$7/19-20/21	n 15 Dec 2024 for Tax Ir 1517(Count : 1)	woice - Late Payment	Penalty (-15	-12-24)	995419	40.00
CGST Output - on pe 12-24)	nalty generated on 15	Dec 2024 for Tax Invo	ice - Late Payn	nent Penalty (- 15-		3.60
SGST Output - on pe 12-24)	nalty generated on 15	Dec 2024 for Tax Invo	ice - Late Payn	nent Penalty (- 15-		3,60
					SUB TOTAL	47.20
TOTAL						47.20
In Words: Rupees	Forty Seven And Twe	nty Paisa Only				
				This is a com	puter generated invoice and re	equires no authentication.
		1	enalty Calcul	lation Summary		
Source Invoice No.	Batch ID	Fine Period	Count	Principal Value () GST Value (₹)	Total Value (₹)
ST/19-20/221517	74798	14-10-2024	1	10.00	1.90	11.80
Notes:						

Improvements to the Security Deposit module

Path: Dashboard >> Accounts >> Dues Tracker >> House dues page

The Security Deposit module has been enhanced with multiple updates to improve functionality, streamline user experience, and ensure alignment with current accounting practices and industry standards.

1. New Option to Collect Security Deposit from House Advance Accounts

In addition to existing payment modes like Cheque, EFT, Cash, and POS, society admins can now settle Security Deposit demands using the house's Default Advance or Multi Advance account. This provides a convenient option to utilize available house balances for deposit payments.

a	Sviluet Society Prod The Island Plus		2025-2026 ~ FAQ Society Admin ~
Q 88 111	Accounts >> Dues and Receipts >> Dues Treater Security Deposit Collect Cheque EFT Date'	Cash OPOS Amount	€ Advance Advance Account [°]
***	05/13/2025	5000.00	A-001-Advance A-001-Maintenance Advance
¢ ©	Reference	Description	A-001-Water Advance A-001-Security Advance A-001-Security Deposit 1
í.	Collect		
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2. SD Reversal Handling – Transfer to Advance Accounts

While reversing a Security Deposit, admins can now transfer the amount to either the house's Multi Advance or Default Advance account. This offers more control over fund allocation and simplifies reconciliation for accountants.

8	Select Society Prod The Island Plus		2025-2026 Y FAQ Society Admin Financial Year A FAQ Society Admin
Q III	Accounts >> Dues and Receipts >> Dues Tracker Security Deposit Reversal	○ Paid Vis Cash	Transfer To Advance
۵	Date"	Amount*	Account
88 Ø	(i) 05/13/2025 System Each		A-001-Advance A-001-Maintenance Advance A-001-Water Advance A-001-Electricity Advance
Ð	Reference	Description	A-001-Security Deposit 1
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	Bauarra		
(50	REVERSE		
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3. Separate Reporting for Members and Non-Members

The Security Deposit balance will now be distinctly shown for members and non-members in the balance sheet, improving financial clarity and aiding compliance with audit and reporting requirements.

	Financial Reports >> Final Account >> Balance Sheet			
۲.	Sri Ganesh Fuel Point	38,232.00	▼ Cash	39,380.3
8	Sruthi Office Solutions	18,987.80	Cash	36,872.3
b	Vision Pools	2,42,372.00	Cash 1	1,108.0
28	abcd	9,000.00	cooll	1,400.0
*	kadminachi ramesh	54,750.00	▼Sundry Debtor	3,030.00
<u> 24-</u>	vijayalakshmi ply and decor	35,989.49	Dues Receivable - Association Fund	-100.0
2	Advance collected from members	3,31,543.50	abcd-Advance	2,130.0
5	Advance collected from non-members	0.00	V Dues rec	1,000.0
a	Prepaid recharge collected from members	0.00	Dues Receivable	1,000.0
9	Prepaid recharge collected from non-members	0.00	Dues Receivable For Members	3,41,13,503.8
<u>a</u>	Security Deposit collected from members	4,062.00	Dues Receivable For Non-Members	11,56,279.2
9	Security Deposit collected from non-members	500.00		
5	Excess of income over expense	2,25,43,170.50	-	
2	Total	3,57,78,102.25	Total	3,61,39,187.17
	- 1 ₂			

4. Inclusion of Security Deposit Ledger in Cash/Bank Statement

The Security Deposit ledger has now been added under the "Party Ledger" section in the Cash/Bank Statement.

Bulk Payout Report to Societies on the Admin Dashboard*

Path: Dashboard >> Accounts >> Bank Accounts >> Bulk Payout Report

Until now, each receipt made by a society was reflected as an individual entry in their bank statement after payout. For example, if 400 transactions of ₹50 each occurred in a day, the society's bank statement would show 400 separate entries with their own UTR numbers. This made reconciliation time-consuming for large societies where large number of transactions occur on a daily basis.

To streamline bank reconciliation, a bulk payout feature has been introduced for society transactions. If enabled, all transactions processed within a day are now consolidated and reflected as a single entry in the bank statement. Using the above example, instead of 400 entries, the bank statement will show just one entry of ₹20,000, significantly simplifying the reconciliation process.

Bulk Payout Report:

To ensure transparency and easy tracking, a dedicated Bulk Payout Report is now available for society admins. This report includes detailed records of all transactions grouped under each bulk payout. Admins can filter transactions by date range and view all entries within a specific payout, making it easier to verify and reconcile payments.

Key Benefits:

- 1. Detailed Tracking: View all transactions grouped under each payout via the bulk payout report.
- 2. **One Click Reconciliation:** All the individual transactions under the bulk entry get reconciled in one step.

This update brings a streamlined approach to managing high transaction volumes and enhances accounting efficiency for societies of all sizes.

* This setting is available to Mygate Finops team only

a 0	Prod Th	e Island Plus	•		20: Find	25-2026 Y Inclal Year A	S Society Adr	nin In
Q	Accounts >> E Bulk Payo	Bank Accounts >> Bulk Pay ut Report	out Report					
08 (1)	- From Date 01/05/20	025 🗐 13/05/	2025 🗐 (^{Bank Account}	76 → CBulk Payout Ref : →	Submit			
88	2 R	sults Found					Reconcile Transact	ions
Ø-	Unit Name	Transaction Date	Doc Type & No	Description	Amount	Credited on	Reconciliation Status	e
e)	D-150	2025-04-30	Dues Receipt - 5376	Online Payment against 8890 booking (1.00	2025-05-02	Pending	
e l	A-101	2025-04-30	Dues Receipt - 5377	Online Payment against 8767 booking (1.00	2025-05-02	Pending	
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Option for admins to put comments while approving PR/PO

Path: Dashboard >> Accounts >> Purchasing >> Purchases

Admins can now add comments while approving Purchase Requests (PR) or Purchase Orders (PO). These comments, along with the approver's name, will be visible on the PR/PO detail page. This enhancement improves transparency, facilitates better decision-making, and ensures a clear audit trail for future reference

Q	- 4									
	Purchase	5		Approve Purcha	ase Requisition				Deloted Records	Create *
<u>م</u>	Purchase Orde	er Hoguest for Que	tation Purch	Comments (if any)						
	Status	Creater	i By	Add approve.com	ments here					
A.	PR To Approve	-							© Rejected PR	Print PR Records
Ð										
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Reference -	Status	Total Amount	*250 characters only	/ (Bigger notes will )	be truncated)			Action	Approve
	PRES	O PR to Approve	200.00						View   Delete   Approve   Re	
20-	PR54	O Pill to Auprove	136.00				Арр	rove Cancel	View   Delote   Approve   Re	ject
Ð	PRS3	O Pill to Approve	70.00		( <u>H</u>				View   Delete   Approve   Re	ect
	PR52	O PR to Appress	10.00	24-12-2024		now test	nacasode	24-12-2024	View   Delete   Approve   Re	ject
₹	PR51	O FR to Approve	10.00	24-12-2024	0	new test	acdevf	24-12-2024	View   Delete   Approve   Re	ject
2	PR50	O PR to Approve	10.00	24-12-2024	Ū	test_non	scadiv	24-12-2024	View   Delete   Approve   Re	HICT.
	PR49	O PR to Approve	4.00	24-12-2024	Amit_ven	MDBILE	cdsvf	24-12-2024	View   Delete   Approve   Re	iect.

Aucounta >> P	urchasing >> P	urchases											
Purchas	e Requisit	tion View	PR A	oproved							Telet	e PR	1
Final Approv	<b>val by :</b> Roshini:	123 (All seems	good. Approv	ed)									
Schedule	ed Date	Depar	tment	Red	questor		Vendor						
13-05-2	1025	Ac	counting	- 1	Roshini123	•	Choose Vend	for	• (abc	d co.			
Payment	t Terms												
test 7													
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Shipping . ghjki item Type	Address	Description	HSN/SAC	Expense Tags	Account	Quantity	Unit of Measurement	Rate	GST Rate	Document	Expected Amount	IGST	
Shipping .ghjkl Item Type Asset	Address Item Name new test	Description bn,	HSN/SAC	Expense Tags Non- Budgeted Eve	Account Asset_Prepaid	Quantity 40.00	Unit of Measurement	Rate 5.00	GST Rate	Document	Expected Amount 200	<b>IGST</b> 0.00	
Shipping .ghjkl item Type Asset	Address Item Name new test	Description bn	HSN/SAC	Expense Tagz Non- Budgeted_Exp	Account Asset_Prepaid	Quantity 40.00	Unit of Measurement	Rate 5.00	GST Rate	Document	Expected Amount 200	<b>IGST</b> 0.00	

## Additional Updates

• Messaging improved for Dues Report in case conflicting filters are selected.

# Security Dashboard Updates (April 2025)

### **Payment Mode configuration in MIMO**

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

Many residents opt for the "Pay in Cash" option while submitting the move-in form, even if their societies do not permit cash payments. According to a lot of societies, payments must be made in advance, and cash payments can only be paid on the move-in date. This often leads to repeated submissions with the same mode of payment, even after rejections, causing multiple requests and unnecessary back-and-forth, especially in communities with high tenant move-ins. To address this, we have introduced an option for admins to configure the accepted modes of payment for MIMO. By default, all three payment modes are enabled, but admins can disable any that are not applicable. If move-in charges are configured, at least one payment mode must remain active.

۱۵. ۲۰۰۵	The Island Plus	~			Financial Year 🔥	FAQ A Society Admin
People Hut	ib >> Residents >> 1	Move In Move Out Reques	ats.			
M	ove in co	onfigure				
Note:	. The requests which	are in progress by the res	idents will be impacted in case of r	a new configuration.		
	Move In	Move Out				
	Resident Info	armation	Documents	Payments	Checklist	Move-in Rules
	Coofigure Charges &	GST				
	Fixe	d	🗇 Custom			
	For Own	iers	For	Tenant	For Multi-Tenant	
	Far Own 1000	1675	For 5	i Tenant Q	For Multi-Tenant 90	
	Far Owr 1000 Enable GST	ners (CG5T: 9% - 5G5T: 9%)	For 5	0	For Multi-Tenant . 90	
	Far Owr 1000 Enable GST Choese Account 50100661891412	(CGST: 9% - 5GST: 9%) - HDFC0002858(Default)	For 5 HSN/SAC Code	Tenant 10	For Multi-Tenant 90	
	For Own 1000 Enable GST Choose Account 50100661891412 Allow Residents to	ners (CGST: 9% - SGST: 9%) :- HDFC0002858(Default) 2 pay through	For 5 HSN/SAC Code	Tenant 10	For Multi-Tenant	

## New sub-categories added to the service provider list

Path: People Hub >> Service Providers >> Service Providers List

Based on feedback from multiple societies and recognising the importance and common usage, we have introduced two new sub-categories under the "Society Maintenance Staff" provider type: *Fireman and DG Operator*. This enhancement enables admins to categorise staff more effectively, ensuring better organisation and clarity within the system.

8	Select Society Prod The Island Plus			2025-2026 - FAQ	Anlin Assisi Society Admin
Q	People Hub >> Service providers >> Service Provider List				
	Service Provider List				
	+ Add Service Provider				
Gr-	Search:				
Ð	Туре	Sub Type	Name	Mobile	
é	Society Maintenance Staff	✓ Select Sub-Type DG Operator			
	Company Select	Fireman Housekeeping Supervisor	Passcode		
(50	Job Status	Society Carpenter Society Electrician			
B	Hired Not Hired	Society Fittings Society Garbage collection			
۲		Society Garden Supervisor			
X	Search O Download Reset search	Society Gardener-Male Society Housekeeding			G

## Service Provider ID card revamp

Path: People Hub >> Service Providers >> Service Providers List

The current service provider ID card generated from the dashboard requires society admins to manually fill in certain fields that are already captured during onboarding. To streamline this process, we are introducing automation to pre-populate fields such as the validity date and hired flats when the ID card is downloaded, reducing manual effort and ensuring accuracy.

Prod	The Island Plus
Issued By:	Name: Maya Service: Driver Registration No: myGate Code: 84874 Basar21 Date Issued: Validity: 08-05-2025 07-05-2028
Property of Prod The Island Plus Owners Association	Flats added: D 102, New 003, Block 1 001 Emergency Contact No.: If found, please send to: Prod The Island Plus Owners Association MyGate Ofice, HSR Layout, test locality 1, Mgdev City 560132
Ser	vice Provider

The admins can also bulk select and bulk download the ID cards based on the selection in the service provider page.

Pe	ople Hu	b >> Service provider	s >> Servio	n Provider List									
•		Society	Company	Name	Mobile Number	Type	Sub Type	Passcode	Passcode Status	Vaccination Status	Hired Flats	Last Active	Created
}	0	Prod The Island Plus		Test DG OPs	View	Society Maintenance Staff	Freman	View	Active	NOT Vaccinated	COMMON AREA Manager Office	15-Apr-2025	15-Apr-2025
	0	Prod The Island Plus		Test Fireman	View	Society Maintenance Staff	DG Operator	View	Active	NOT Vaccinated	COMMON AREA 2	15-Apr-2025	15-Apr-2025
		Prod The Island Plus		Raunak	View	Daily Help	Maid	View	Active	NOT Vaccinated	A.Fortuna	03-May-2025	11-Apr-2025
2		Prod The Island Plus		Ayush Two		Daily Help	Cook	View	Active	NOT Vaccinated	HIRE	28-Mar-2025	28-Mar-2025
		Prod The Island Plus		Hrithik	View	Daily Help	Cook	View	Active	NOT Vaccinated	A 104	07-May-2025	24-Mar-2025
		Prod The Island Plus		Daily Help atul	View	Daily Help	Mald	View	Active	NOT Vaccinated	A.55	20-Mar-2025	20-Mar-2025
		Prod The Island Plus		<u>Yashhh</u>	View	Daily Help	Mald	View	Active	NOT Vaccinated	A 1007	19-Mar-2025	19-Mar-2025
e ¹	0	Prod The Island Plus		Daily Help	View	Daily Help	Maid	View	Active	NOT Vaccinated	A.011	20-Mar-2025	18-Mar-2025
	1	2 3 4 5	6 7	8 9 m	ext last								

## **Additional Updates**

- 1. Society Setting Enable or Disable Rent a Parking
- 2. Visitor section click redirection from the Community tab of the app
- 3. Alef Enhancements on Dashboard and Homes
- 4. Currency handling in Homes and P2P
- 5. Elastic Search Improvements