ERP Dashboard Updates (June’ 2025)

Helpdesk Dashboard setup updates for a better experience

Path: Dashboard >> Helpdesk >> Settings/Complaints

The Helpdesk module has received important updates to enhance user experience and improve ticket management efficiency. With the Saarthi integration, we're implementing additional changes to make the entire helpdesk system more productive and streamlined for all users.

1. Staff’s availability-based auto-assignment of tickets

Previously, helpdesk tickets were auto-assigned within the defined rules in a randomized manner. With this update, tickets will now be auto - assigned using Round Robin logic—ensuring tickets are distributed equally among staff members.

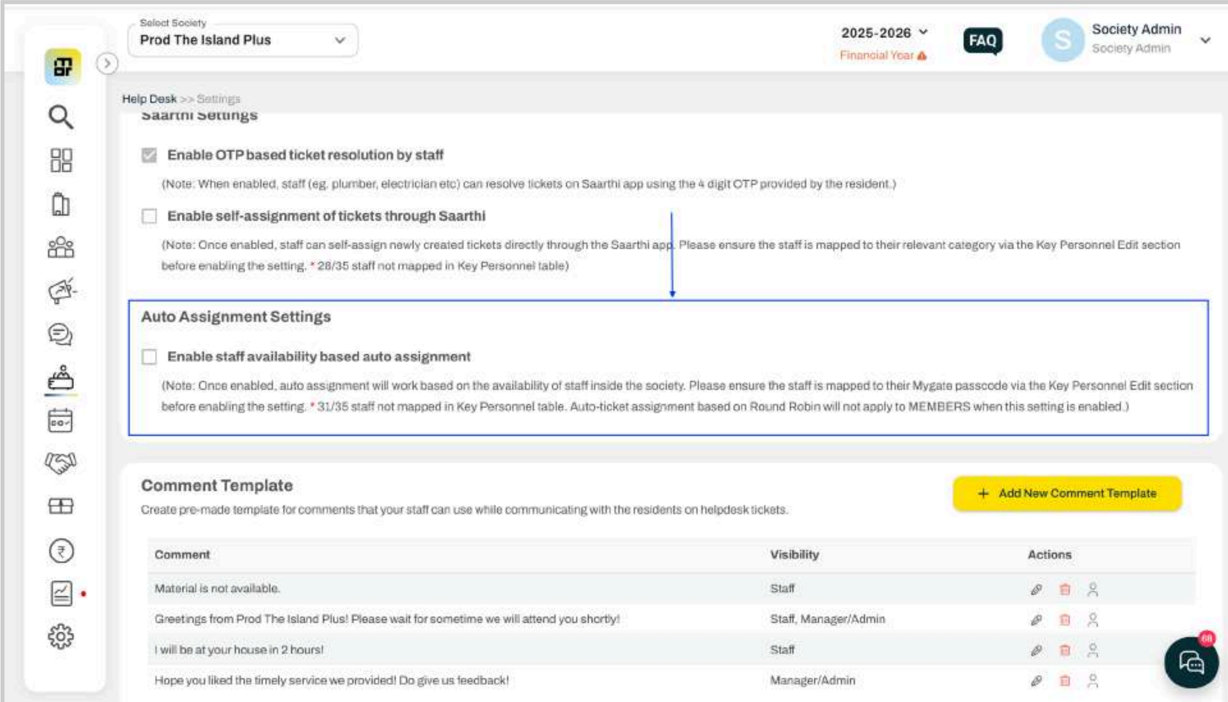
Additionally, tickets can now be auto-assigned based on staff’s availability, using entry and exit records captured through the Mygate passcode system.

Availability based auto assignment is a setting-based feature that can be enabled from the Dashboard by navigating to: *Helpdesk >> Settings.* For the feature to work it is necessary that each staff member’s Mygate passcode is added under the ‘Key Personnel’ section.

This provides the following benefits:

1. **Fair distribution of tickets:** Round robin logic ensures balanced workload among staff.
2. **Real-time allocation:** Tickets go only to staff who are currently inside the society.
3. **Better efficiency:** Reduces manual intervention to manage duty rosters and ensures faster response times.

**This setting is available to society admins*

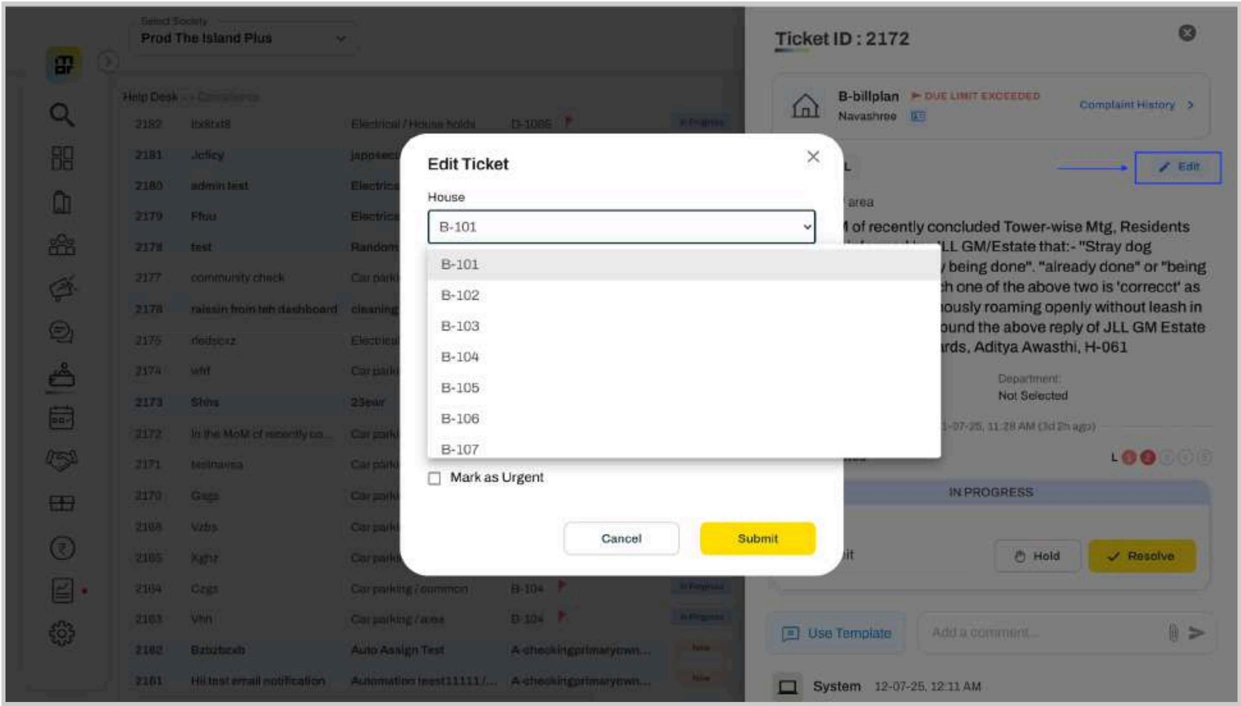


2. Option to edit flat number for an ongoing ticket

Admins and managers can now edit the flat number on helpdesk tickets, even after they've been created. This is especially useful when a ticket is mistakenly raised for the wrong unit from the dashboard.

This provides the following benefits:

1. Helpdesk managers can easily fix incorrect flat mappings without deleting or recreating the ticket.
2. Avoids unnecessary back-and-forth caused by incorrect ticket assignments.



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

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

The Saarthi App was integrated with the Helpdesk module at the start of this year, offering a dedicated interface for helpdesk staff to view and manage their assigned tickets.

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. Helpdesk Staff Can Now Self-Assign Tickets via Saarthi App

Helpdesk staff often rely on managers to assign tickets, which can sometimes delay resolution.

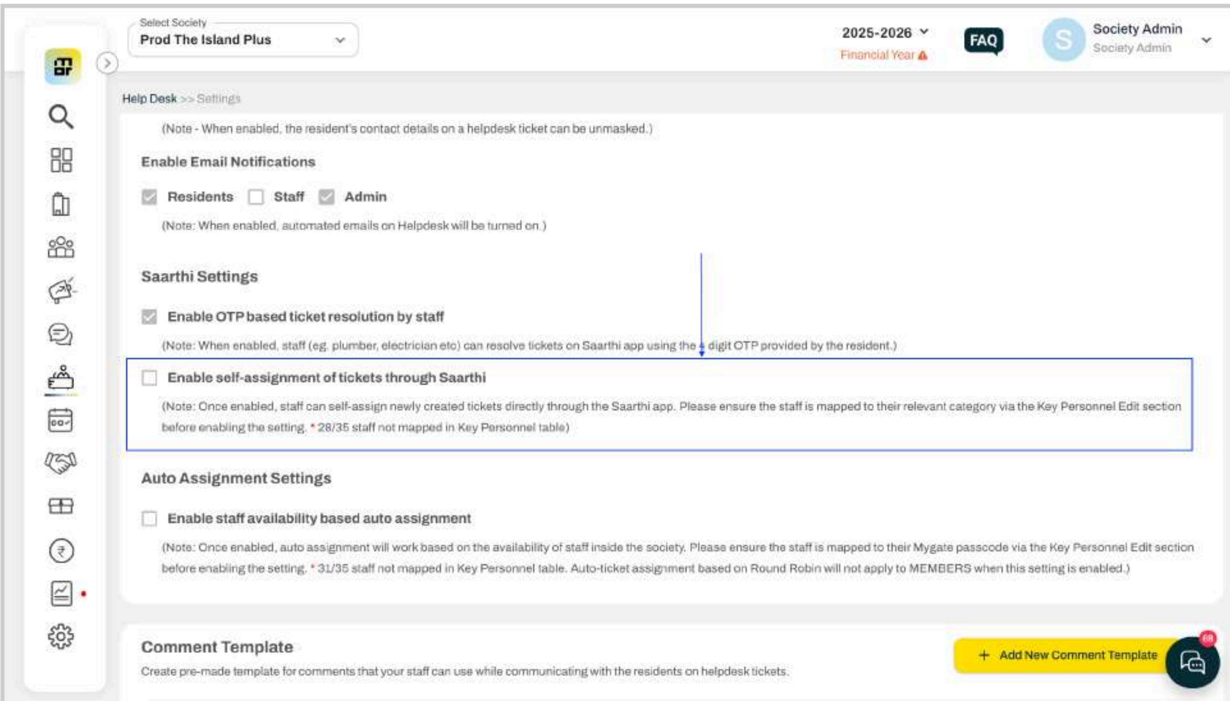
To streamline this process, we've introduced a new feature that allows helpdesk staff to self-assign tickets directly through the Saarthi app. Once enabled, tickets from the categories they are mapped to will appear as "Unassigned" on the app, giving them the option to assign the ticket to themselves and begin working on them immediately. This brings more flexibility, faster response times, and accountability to ticket resolution.

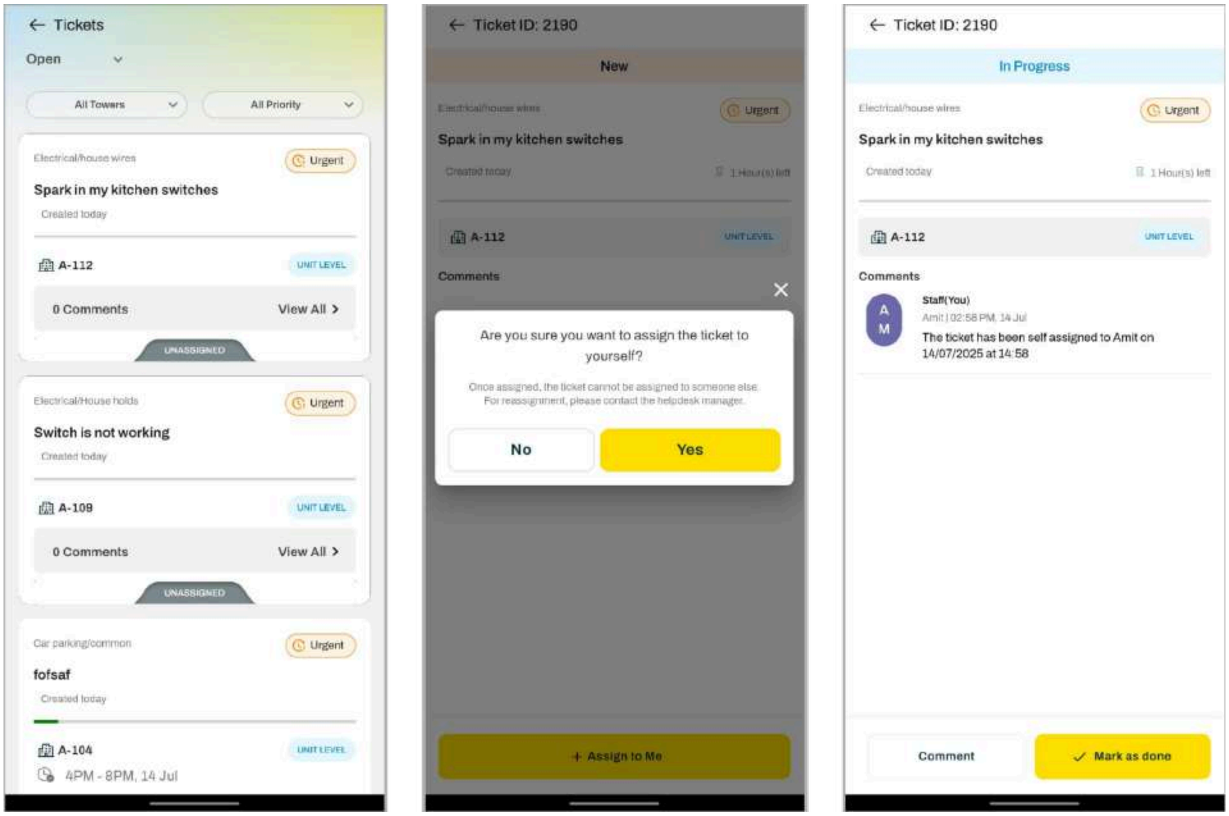
This is a setting based feature that can be enabled from the dashboard by navigating to: *Helpdesk >> Settings >> Saarthi Settings.* For the feature to work it is necessary that each staff member's category is added under the 'Key Personnel' section.

This provides the following benefits:

1. Empowers staff to manage and act on tickets proactively to meet their SLAs.
2. Reduces manager workload for routine assignments.

**This setting is available to society admin*





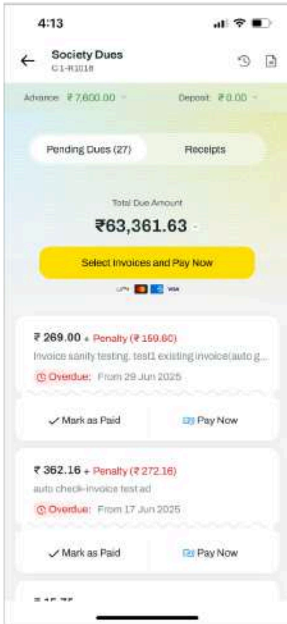
‘Society Dues’ module in a new avatar on the resident app

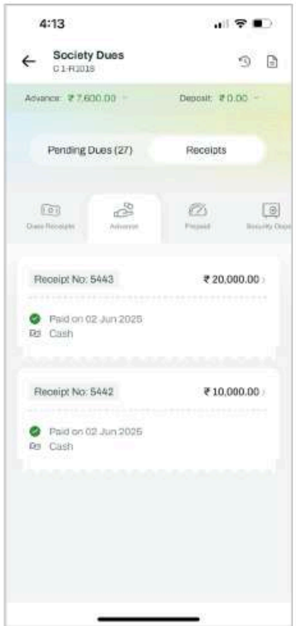
Path: App >> Payments >> Society Dues

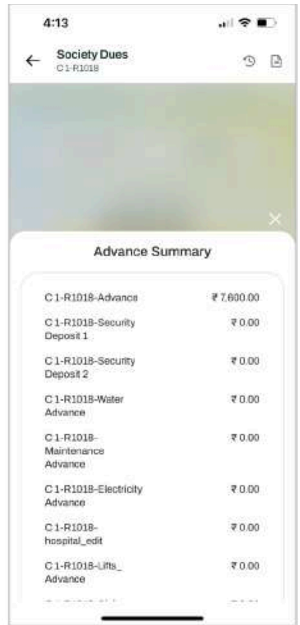
The Society Dues invoice listing page on the resident app has been redesigned with a new, intuitive UI and major performance improvements. Key Highlights in the new update:

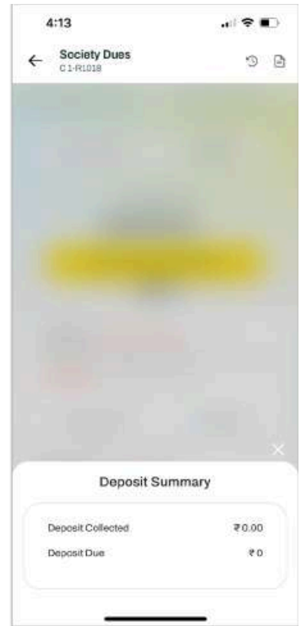
1. Invoices and receipts are now shown under separate tabs, with a detailed drill-down view for each receipt type (e.g., advance, security deposit, etc.), making it easier for residents to navigate and track their payments
2. The page has also been optimized to load 10x faster, even for residents with a high volume of transactions.

This update has been rolled out in a limited manner and is currently live for 100 societies. We are actively working on enhancing the other pages in this module to align with the new experience.







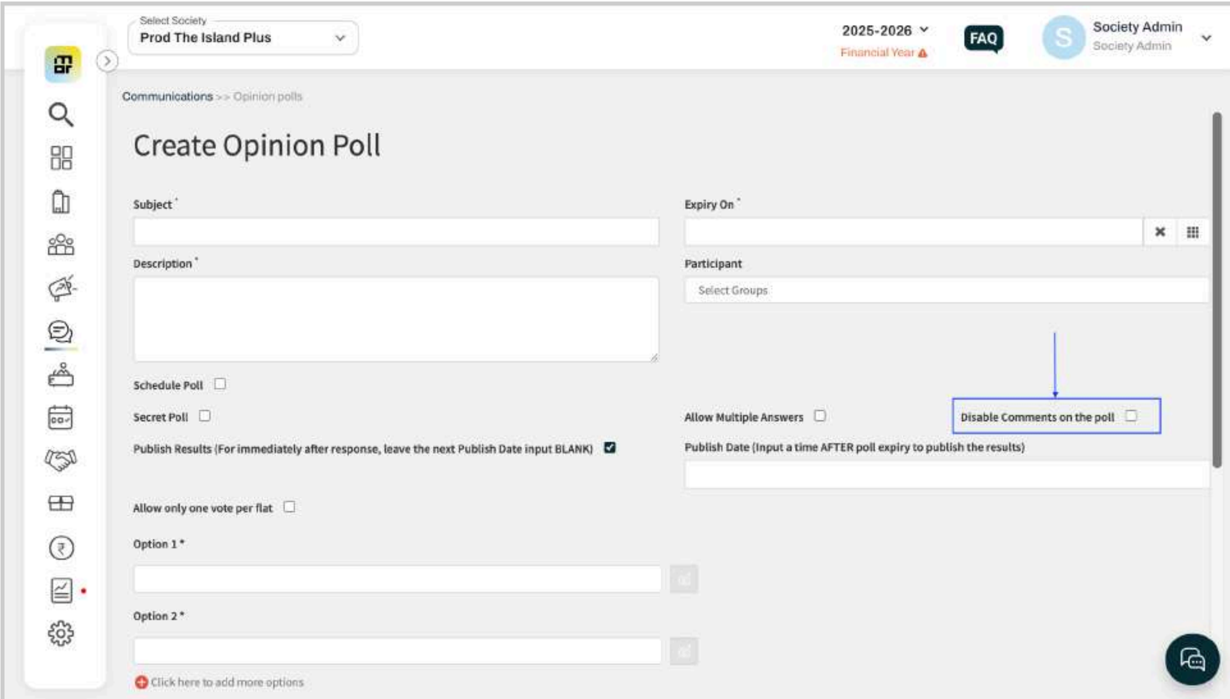


Admin can restrict comments on Policy-centric Opinion Polls

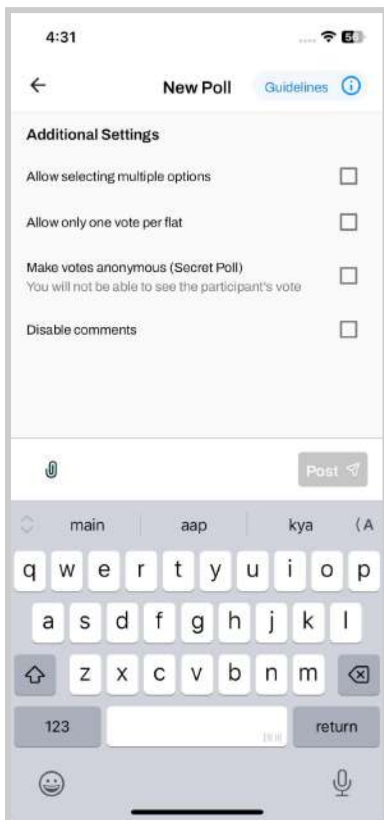
Path: Dashboard >> Communications >> Opinion Polls >> Create Opinion Poll

Admins can now disable resident comments while creating an opinion poll, to help maintain the integrity of sensitive or high-impact polls. This would ensure that residents do not influence other's responses through pointed comments.

This option is available for admins during poll creation on both the Dashboard and the Resident App.



Select Society
Prod The Island Plus
2025-2026
Financial Year
FAQ
Society Admin
Society Admin
Communications >> Opinion polls
Create Opinion Poll
Subject *
Expiry On *
Description *
Participant
Select Groups
Schedule Poll
Secret Poll
Allow Multiple Answers
Disable Comments on the poll
Publish Results (For immediately after response, leave the next Publish Date input BLANK)
Publish Date (Input a time AFTER poll expiry to publish the results)
Allow only one vote per flat
Option 1 *
Option 2 *
Click here to add more options



4:31
New Poll
Guidelines
Additional Settings
Allow selecting multiple options
Allow only one vote per flat
Make votes anonymous (Secret Poll)
You will not be able to see the participant's vote
Disable comments
Post
main
aap
kya
123
return

Amenity Booking setup updates for a better experience

Path: Dashboard >> Amenities >> Settings/Bookings

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

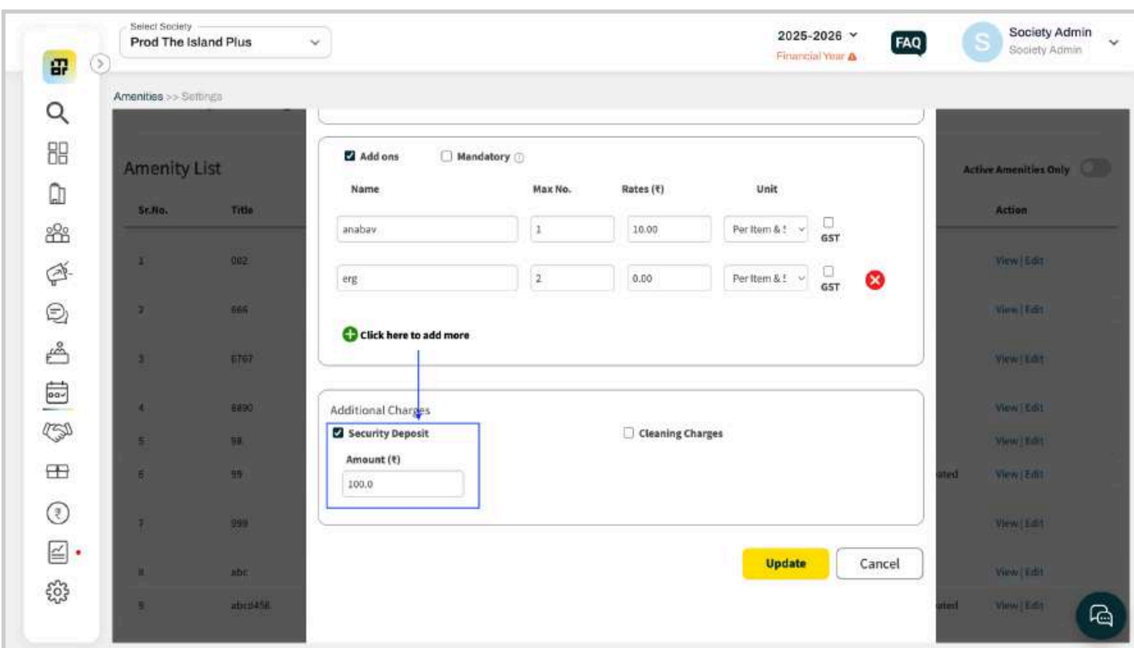
1. Security Deposit Module now Integrated with Amenity Booking

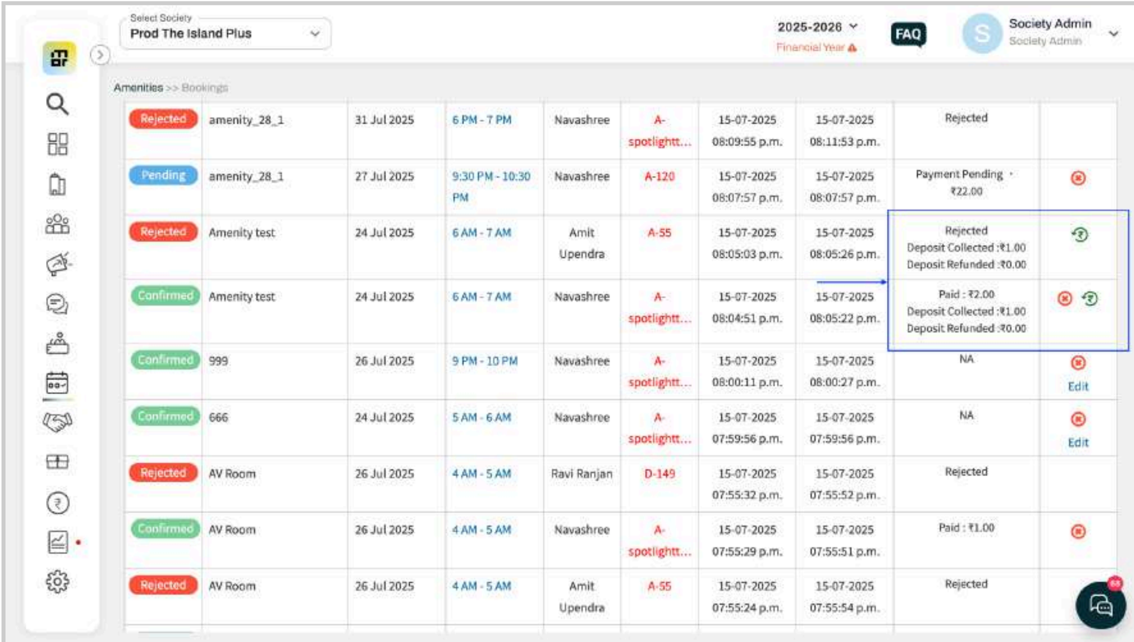
Earlier, security deposits collected during amenity bookings (such as party halls or auditoriums) were simply included as a line item in the booking invoice.

With this update, the Amenity module is now integrated with the Security Deposit module. This allows admins to collect security deposits separately and manage them using the dedicated security deposit workflow—enabling proper accounting, easier reversals, and transparent record-keeping.

Once collected, deposits can be tracked, reversed, or refunded directly through the Security Deposit module in the ERP, maintaining clean separation between booking income and refundable deposit liabilities.

Please note: The security deposit option is currently not supported for modes of payment like "I will pay later" or "Pay through house advance".



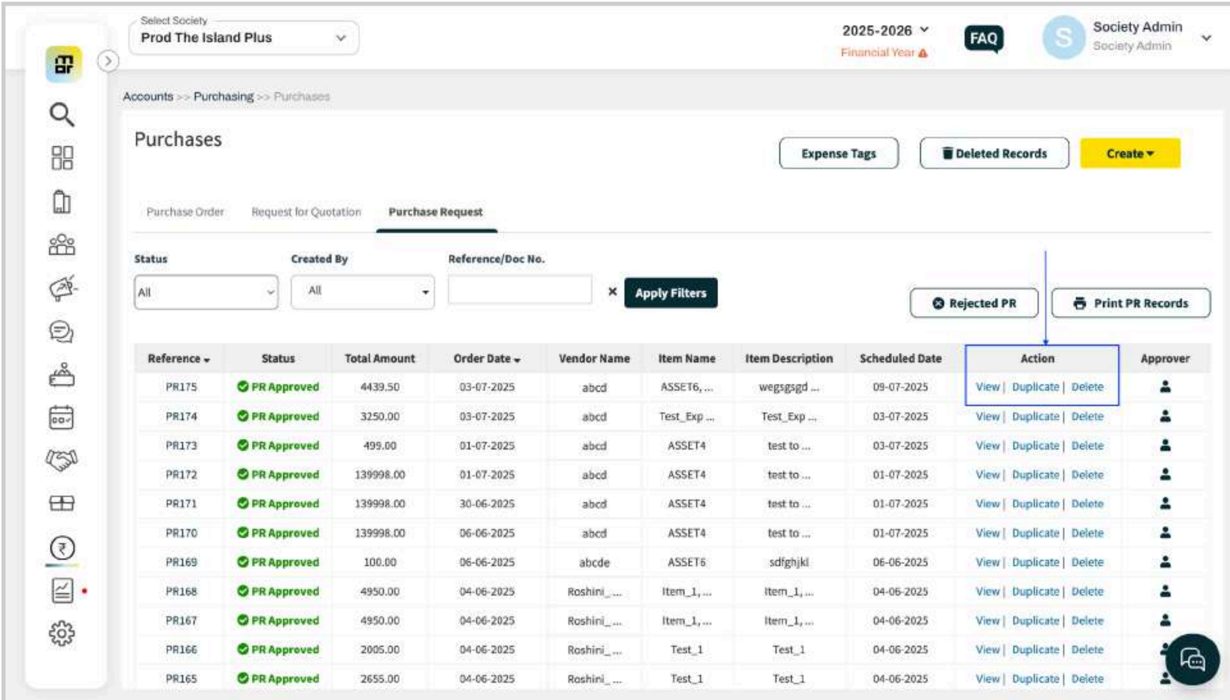


Easily Duplicate high frequency purchase requests (PRs)

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

Admins can now duplicate an existing Purchase Request (PR) with a single click, making it easier to create similar PRs without re-entering the same details repeatedly.

This saves time and reduces manual effort in day-to-day procurement workflows.

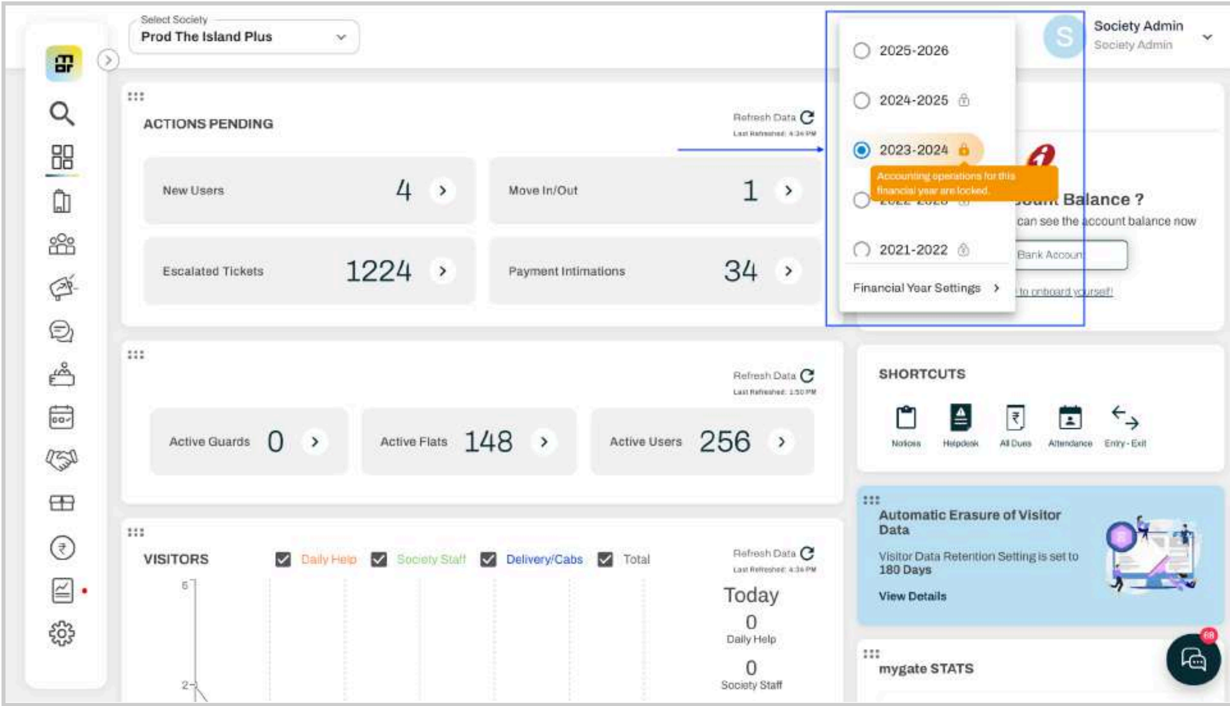


Lock your Audited Financial Year to prevent accounting changes

To maintain the accuracy and integrity of financial records—especially after audits—admins can now lock the accounting module up to their finalized financial year. Once locked, no new entries, updates, or deletions can be performed for transactions within and before that FY. This ensures that finalized financial data remains secure and unchanged.

This provides the following benefits:

1. Prevents unintentional or unauthorized changes to audited records
2. Helps avoid discrepancies in financial reporting
3. Acts as a safeguard against post-audit data inconsistencies



Locked years appear with a label in change FY drop down

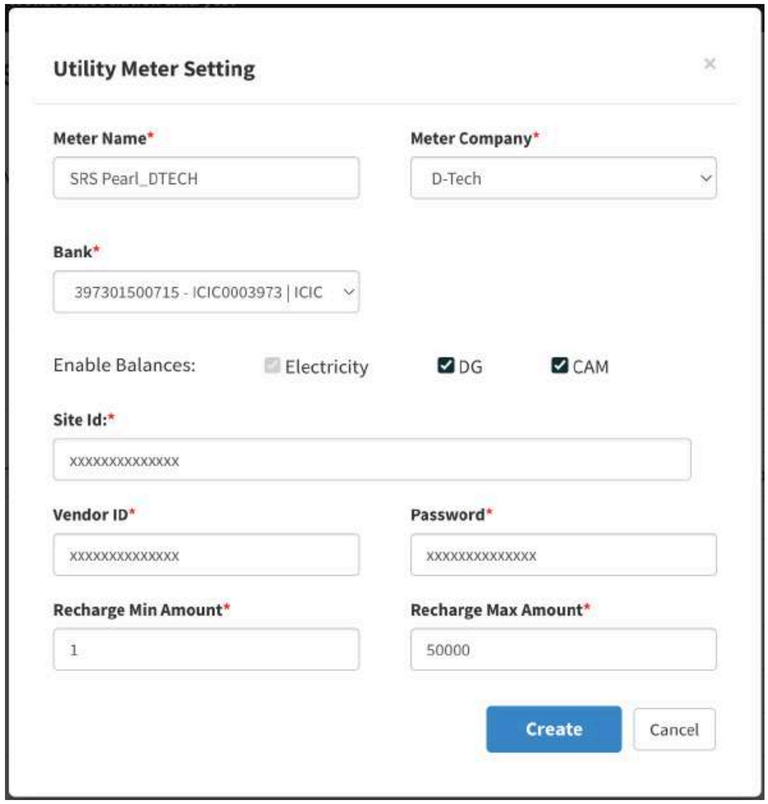
Prepaid : D-Tech meter integration

Path: Society >> Utility Meters >> Electricity Meters >> Settings

D Tech smart electricity meters have now been integrated with the Mygate ecosystem. Like other server based meters, they offer features such as live balance and readings, instant recharge, etc. However, different from other metres they also offer a unique setup for separated CAM and Electricity balances and their recharge.

The following details are required from the integration partner / society to onboard this meter :

1. Site ID
2. Vendor ID
3. Password
4. Flat and Meter ID mapping



D-Tech Prepaid Meter setting on dashboard

Defaulter Threshold Configuration based on Flat Area

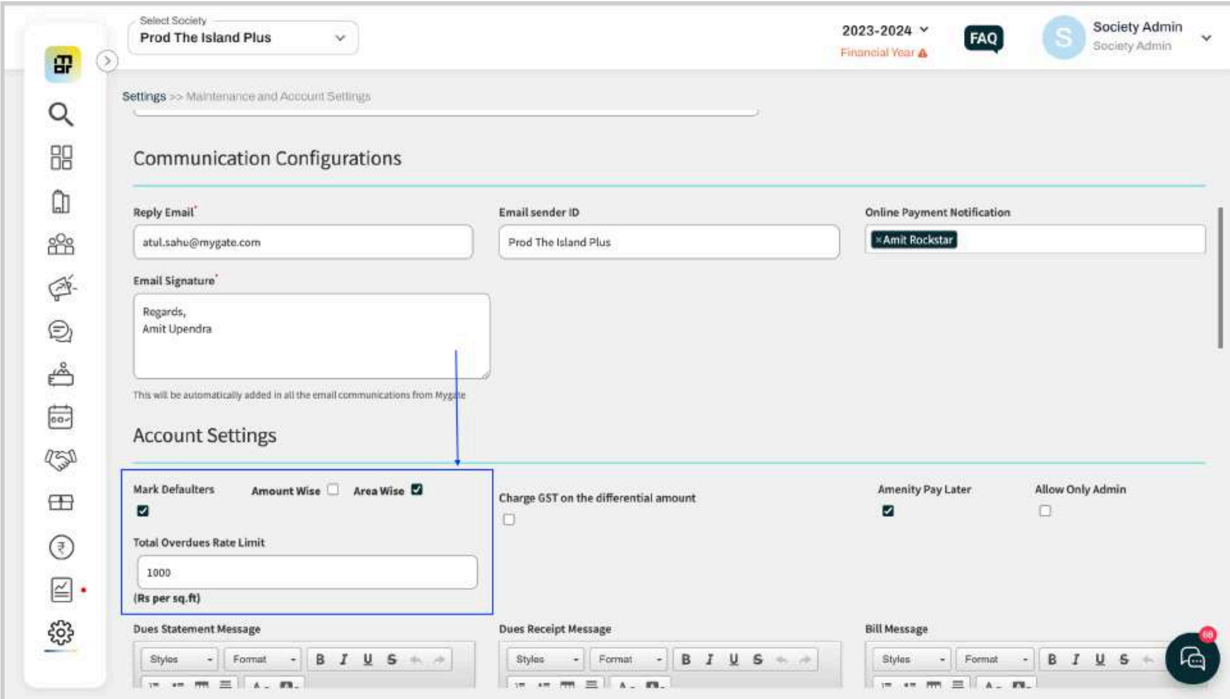
Path: Dashboard >> Settings >> Maintenance and Account Settings >> Account Settings

Building on the existing ability to configure defaulter thresholds using fixed amounts (both overall and bill plan-wise), admins can now set the defaulter threshold based on flat area (in ₹/sq. ft.) as well. This enhancement allows for more accurate defaulter identification in societies where invoices mainly maintenance charges are area-based.

This provides the following benefits:

1. Enables more equitable defaulter tagging in area-based maintenance societies
2. Offers greater flexibility in defaulter configuration
3. Ensures consistency with society billing structures and expectations

**Bill plan wise configurations are available only to MIS team*



Additional Updates

1. Residents can now view their meter numbers directly in the app.
2. A 5th level of escalation can now be added by society admins in the Helpdesk module.
3. Society admins can now download the Income vs. Expense Analysis excel report.