ERP Dashboard Updates (May’ 2025)

Helpdesk Dashboard setup updates for a better experience

Path: 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.

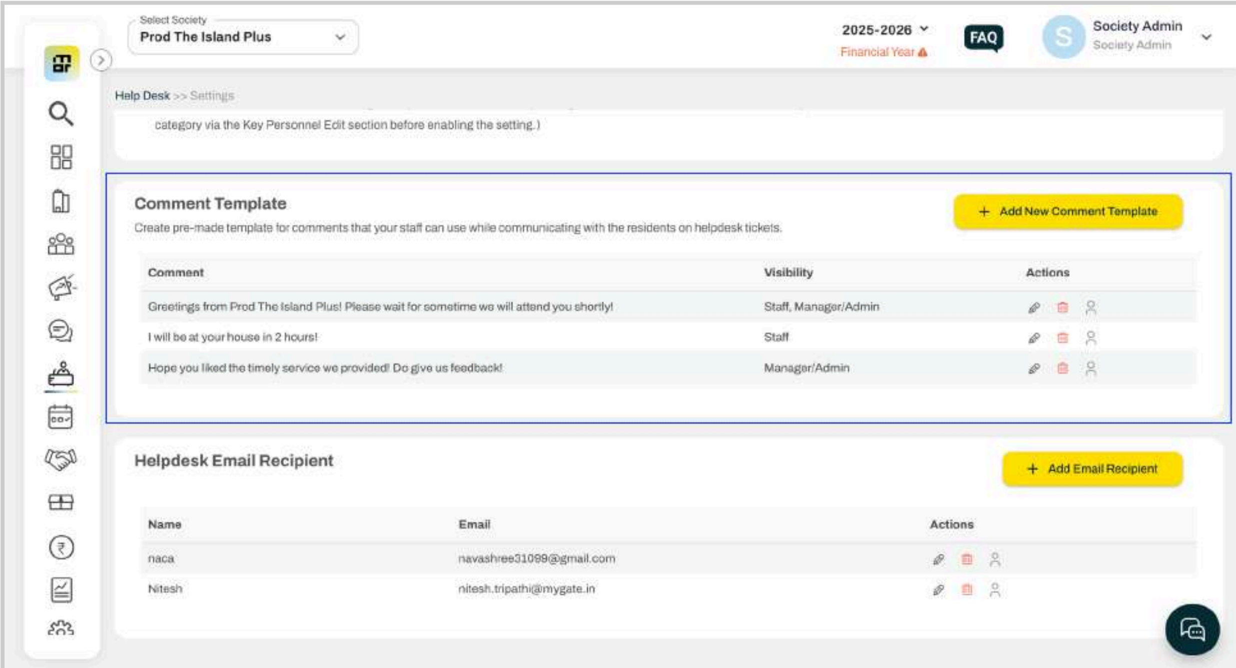
1. Custom comment templates for helpdesk manager and staff.

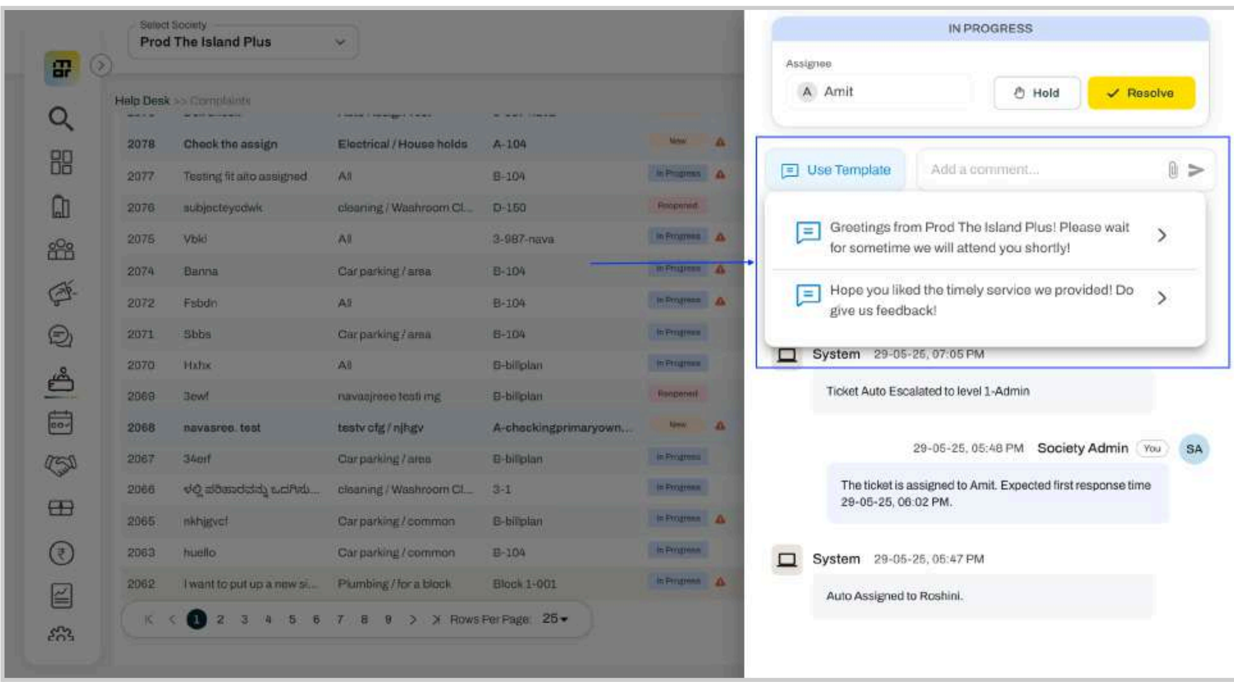
Helpdesk managers & staff using the dashboard & Saarthi app can add comments on the tickets assigned to them. However, for staff; due to language limitations, these comments are often unclear to residents and admins. Additionally, many comments are repetitive—for example, “Material is not available” or “The staff will be at your house in 2 hours”—and are frequently used by both staff and managers.

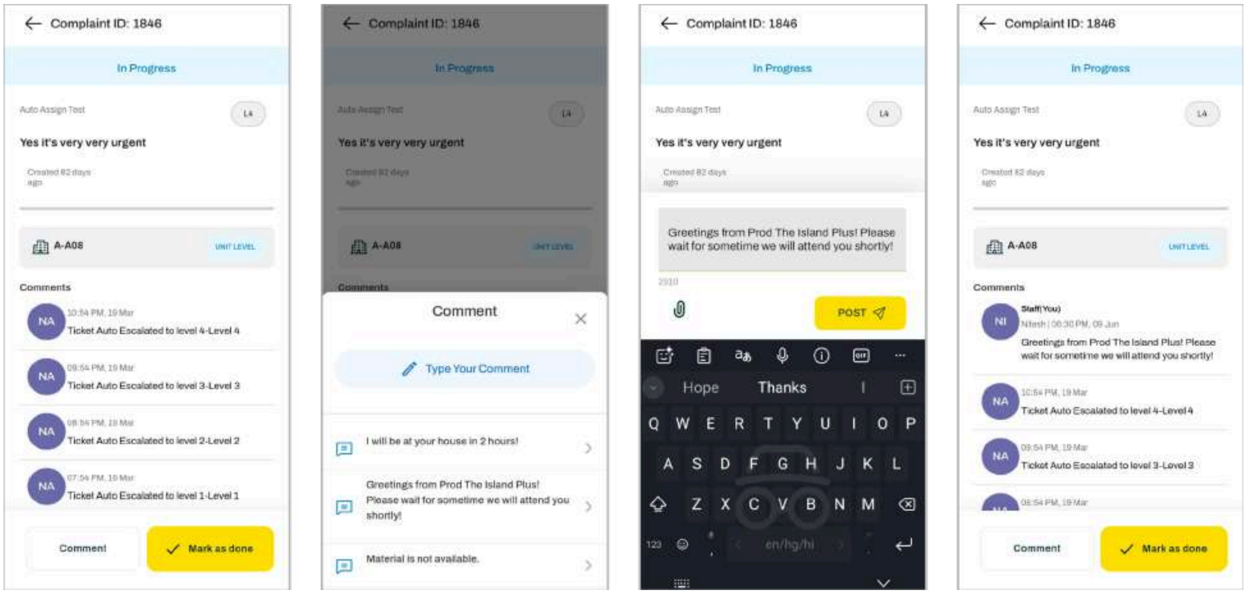
Admins can now configure and manage comment templates directly from the Settings page of the Helpdesk module. Under the new Comment Templates section, admins can create templates and control their visibility—choosing whether they appear on the Dashboard, the Saarthi App, or both.

Helpdesk managers and staff can then select from these predefined templates when adding comments to tickets, resulting in several key benefits:

1. **Time efficiency**: Eliminates the need to repeatedly type common responses.
2. **Language support**: Enables staff with language limitations to communicate more confidently and clearly.
3. **Improved communication:** Enhances the overall ticket resolution process with consistent and clear updates between residents, managers, and staff.


Select Society
Prod The Island Plus
2025-2026
Financial Year
FAQ
Society Admin
Society Admin
Help Desk >> Settings
category via the Key Personnel Edit section before enabling the setting.)
Comment Template
Create pre-made template for comments that your staff can use while communicating with the residents on helpdesk tickets.
+ Add New Comment Template
Comment
Visibility
Actions
Greetings from Prod The Island Plus! Please wait for sometime we will attend you shortly!
Staff, Manager/Admin
I will be at your house in 2 hours!
Staff
Hope you liked the timely service we provided! Do give us feedback!
Manager/Admin
Helpdesk Email Recipient
+ Add Email Recipient
Name
Email
Actions
naca
navashree31099@gmail.com
Nitesh
nitesh.tripathi@mygate.in


Select Society
Prod The Island Plus
Help Desk >> Complaints
IN PROGRESS
Assignee
Amit
Hold
Resolve
Use Template
Add a comment...
Greetings from Prod The Island Plus! Please wait for sometime we will attend you shortly!
Hope you liked the timely service we provided! Do give us feedback!
System 29-05-25, 07:05 PM
Ticket Auto Escalated to level 1-Admin
29-05-25, 05:48 PM Society Admin You
The ticket is assigned to Amit. Expected first response time 29-05-25, 06:02 PM.
System 29-05-25, 05:47 PM
Auto Assigned to Roshini.
Rows Per Page: 25

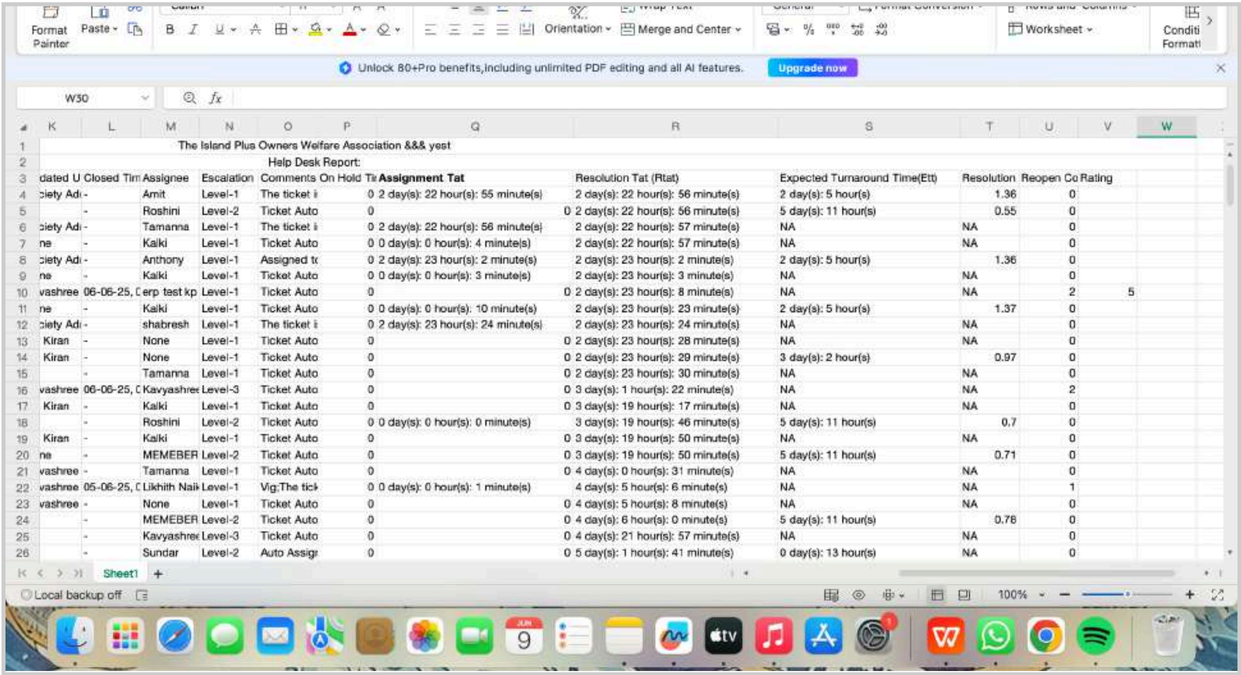


2. Helpdesk Report - Track the first assignment TAT of a helpdesk ticket

Admins can now monitor the First Assignment Turnaround Time (TAT) for every Helpdesk ticket directly from the Helpdesk report. What is the first assignment TAT? It refers to the time taken to assign a ticket from the moment it is created.

This metric enables admins to assess the responsiveness of Helpdesk managers in assigning tickets promptly. By ensuring timely assignment, the team can drive faster resolutions and improve overall resident satisfaction.

**Tickets assigned using the auto assignment setting will have first assignment TAT as zero by default*



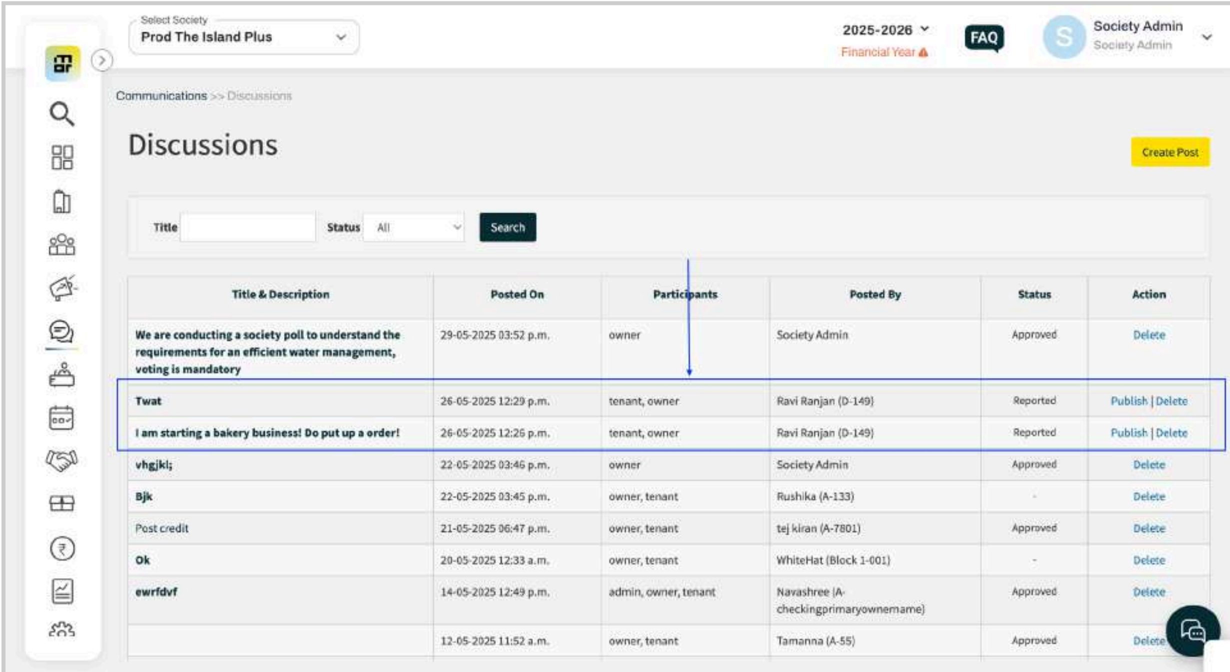
	K	L	M	N	O	P	Q	R	S	T	U	V
1	The Island Plus Owners Welfare Association &&& yest											
2	Help Desk Report:											
3	dated U	Closed Tim	Assignee	Escalation	Comments	On Hold Ti	**Assignment Tat**	Resolution Tat (Rtat)	Expected Turnaround Time(Ett)	Resolution	Reopen Co	Rating
4	ciety Adı	-	Amit	Level-1	The ticket i	0	2 day(s): 22 hour(s): 55 minute(s)	2 day(s): 22 hour(s): 56 minute(s)	2 day(s): 5 hour(s)	1.36	0	
5		-	Roshini	Level-2	Ticket Auto	0	0	2 day(s): 22 hour(s): 56 minute(s)	5 day(s): 11 hour(s)	0.55	0	
6	ciety Adı	-	Tamanna	Level-1	The ticket i	0	2 day(s): 22 hour(s): 56 minute(s)	2 day(s): 22 hour(s): 57 minute(s)	NA	NA	0	
7	ne	-	Kalki	Level-1	Ticket Auto	0	0 day(s): 0 hour(s): 4 minute(s)	2 day(s): 22 hour(s): 57 minute(s)	NA	NA	0	
8	ciety Adı	-	Anthony	Level-1	Assigned tc	0	2 day(s): 23 hour(s): 2 minute(s)	2 day(s): 23 hour(s): 2 minute(s)	2 day(s): 5 hour(s)	1.36	0	
9	ne	-	Kalki	Level-1	Ticket Auto	0	0 day(s): 0 hour(s): 3 minute(s)	2 day(s): 23 hour(s): 3 minute(s)	NA	NA	0	
10	vashree	06-06-25, C	erp test kp	Level-1	Ticket Auto	0	0	2 day(s): 23 hour(s): 8 minute(s)	NA	NA	2	5
11	ne	-	Kalki	Level-1	Ticket Auto	0	0 day(s): 0 hour(s): 10 minute(s)	2 day(s): 23 hour(s): 23 minute(s)	2 day(s): 5 hour(s)	1.37	0	
12	ciety Adı	-	shabresh	Level-1	The ticket i	0	2 day(s): 23 hour(s): 24 minute(s)	2 day(s): 23 hour(s): 24 minute(s)	NA	NA	0	
13	Kiran	-	None	Level-1	Ticket Auto	0	0	2 day(s): 23 hour(s): 28 minute(s)	NA	NA	0	
14	Kiran	-	None	Level-1	Ticket Auto	0	0	2 day(s): 23 hour(s): 29 minute(s)	3 day(s): 2 hour(s)	0.97	0	
15		-	Tamanna	Level-1	Ticket Auto	0	0	2 day(s): 23 hour(s): 30 minute(s)	NA	NA	0	
16	vashree	06-06-25, C	Kavyashree	Level-3	Ticket Auto	0	0	3 day(s): 1 hour(s): 22 minute(s)	NA	NA	2	
17	Kiran	-	Kalki	Level-1	Ticket Auto	0	0	3 day(s): 19 hour(s): 17 minute(s)	NA	NA	0	
18		-	Roshini	Level-2	Ticket Auto	0	0 day(s): 0 hour(s): 0 minute(s)	3 day(s): 19 hour(s): 46 minute(s)	5 day(s): 11 hour(s)	0.7	0	
19	Kiran	-	Kalki	Level-1	Ticket Auto	0	0	3 day(s): 19 hour(s): 50 minute(s)	NA	NA	0	
20	ne	-	MEMEBER	Level-2	Ticket Auto	0	0	3 day(s): 19 hour(s): 50 minute(s)	5 day(s): 11 hour(s)	0.71	0	
21	vashree	-	Tamanna	Level-1	Ticket Auto	0	0	4 day(s): 0 hour(s): 31 minute(s)	NA	NA	0	
22	vashree	05-06-25, C	Likhith Naik	Level-1	Vig;The tick	0	0 day(s): 0 hour(s): 1 minute(s)	4 day(s): 5 hour(s): 6 minute(s)	NA	NA	1	
23	vashree	-	None	Level-1	Ticket Auto	0	0	4 day(s): 5 hour(s): 8 minute(s)	NA	NA	0	
24		-	MEMEBER	Level-2	Ticket Auto	0	0	4 day(s): 6 hour(s): 0 minute(s)	5 day(s): 11 hour(s)	0.76	0	
25		-	Kavyashree	Level-3	Ticket Auto	0	0	4 day(s): 21 hour(s): 57 minute(s)	NA	NA	0	
26		-	Sundar	Level-2	Auto Assigr	0	0	5 day(s): 1 hour(s): 41 minute(s)	0 day(s): 13 hour(s)	NA	0	

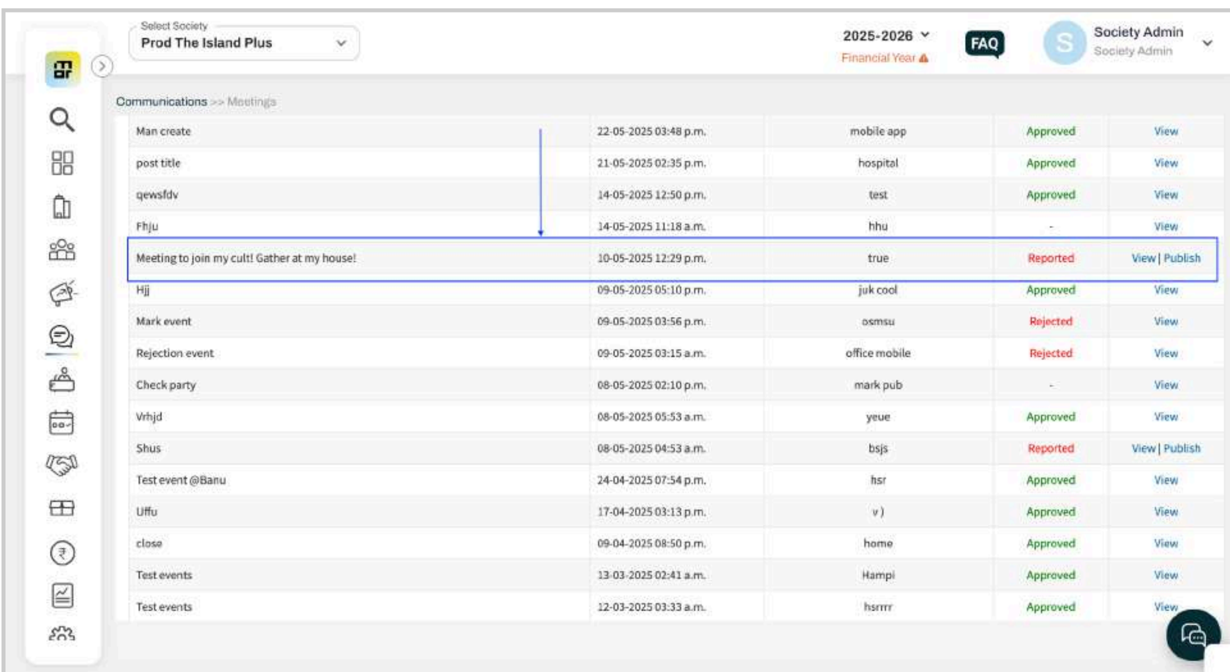
Visibility of Reported Events & Posts on Dashboard

Path: Communication >> Discussions/Meetings

Events and posts reported by residents will now be visible to admins on the dashboard under the status “Reported.” This enhancement ensures that any flagged content is brought to the admin’s attention directly within the dashboard. After reviewing, the admin can choose to re-publish the event or post to the resident app if deemed appropriate.

This feature provides a better moderation control & improved transparency to the society admins.





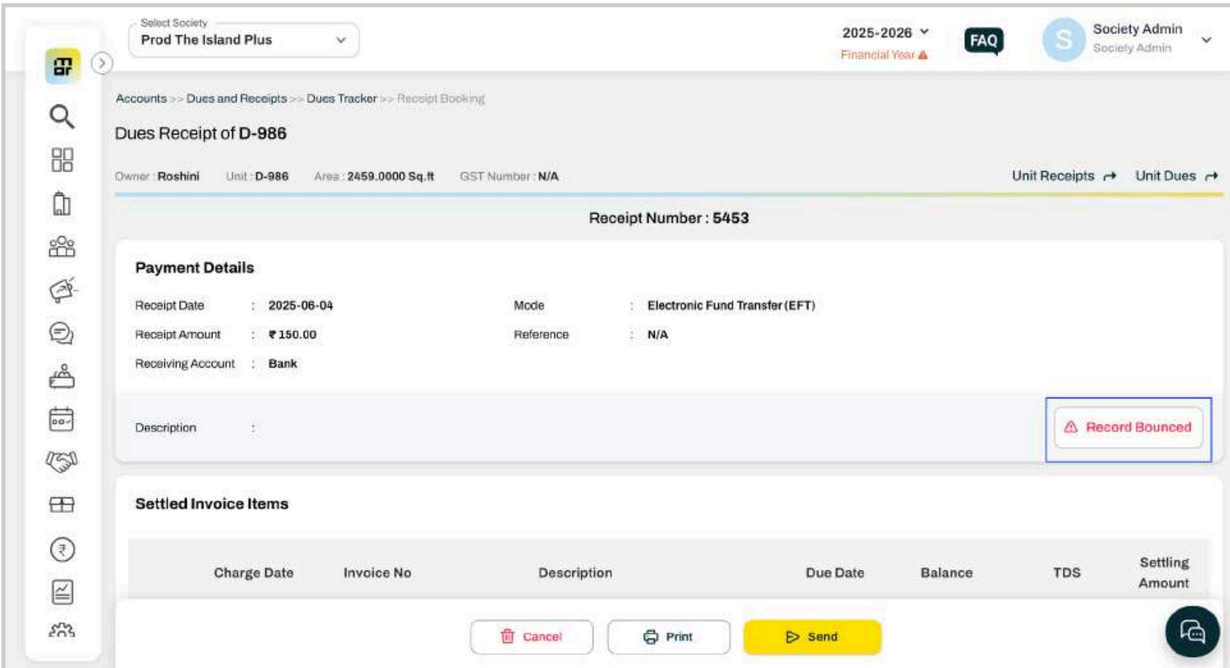
Receipt Reversal Now Available for EFT & POS Transactions

Path: Accounts >> Dues and Receipts >> Receipt Register >> View

Previously, society admins could only reverse receipts where Cheque was the mode of payment. With this enhancement, the receipt reversal option is now extended to EFT (Electronic Funds Transfer) and POS

(Point of Sale) transactions as well. This feature brings added flexibility in managing and correcting payment records within the system and provides the following benefits:

1. Enables reversal of foreign transactions often made via EFT or POS.
2. Admins can now manage and rectify a wider range of payment modes.
3. Helps maintain clean and error-free financial records.



New Summary in Accumulated Penalty view on the House Dues Page

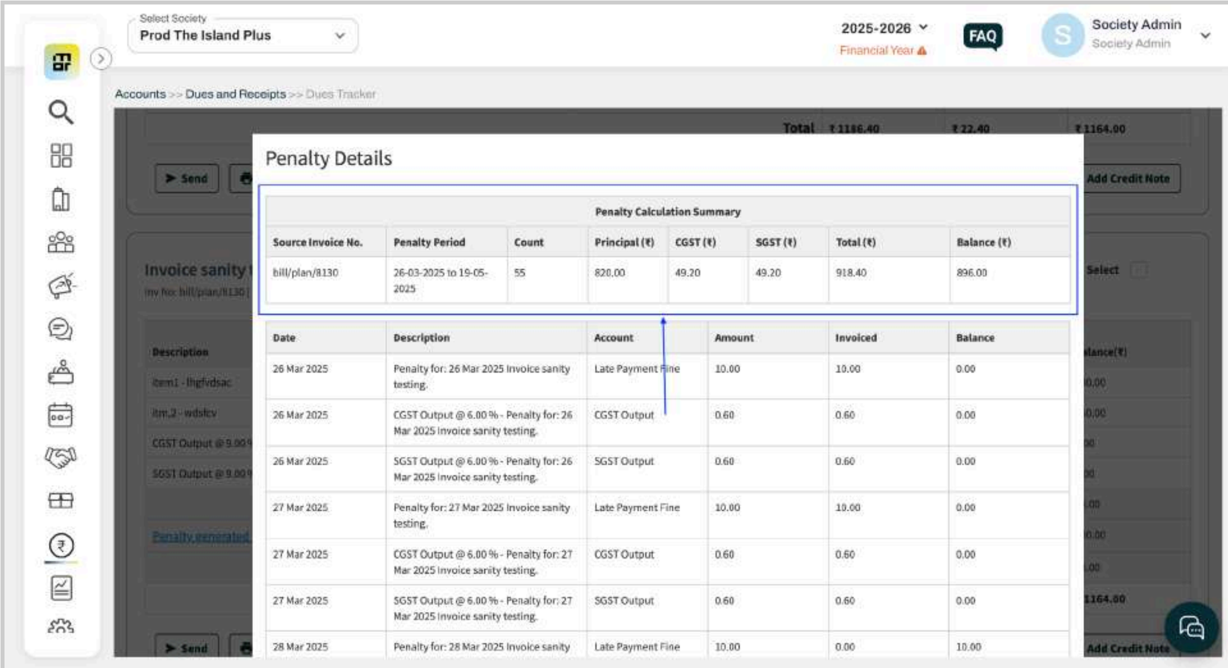
Path: Accounts >> Dues and Receipts >> Receipt Register >> View

The accumulated penalty for an invoice will now be displayed as a detailed summary within its pop-up view on the House Dues page. This provides better visibility into how penalty charges were applied.

The summary provides the following key details:

1. Source Invoice No. *(on which the penalty was applied)*
2. *Penalty Period (start and end date of penalty accumulated)*
3. Count *(Number of times penalty was applied during the above period)*
4. Principal Amount, GST Amount, Total Amount and Balance that is yet to be paid

This offers transparency into penalty calculations for society admins, helps clarify charge breakdowns and improves billing accuracy.



Instant Settlement from advance & Penalty Date options added to Single/Adhoc Invoicing

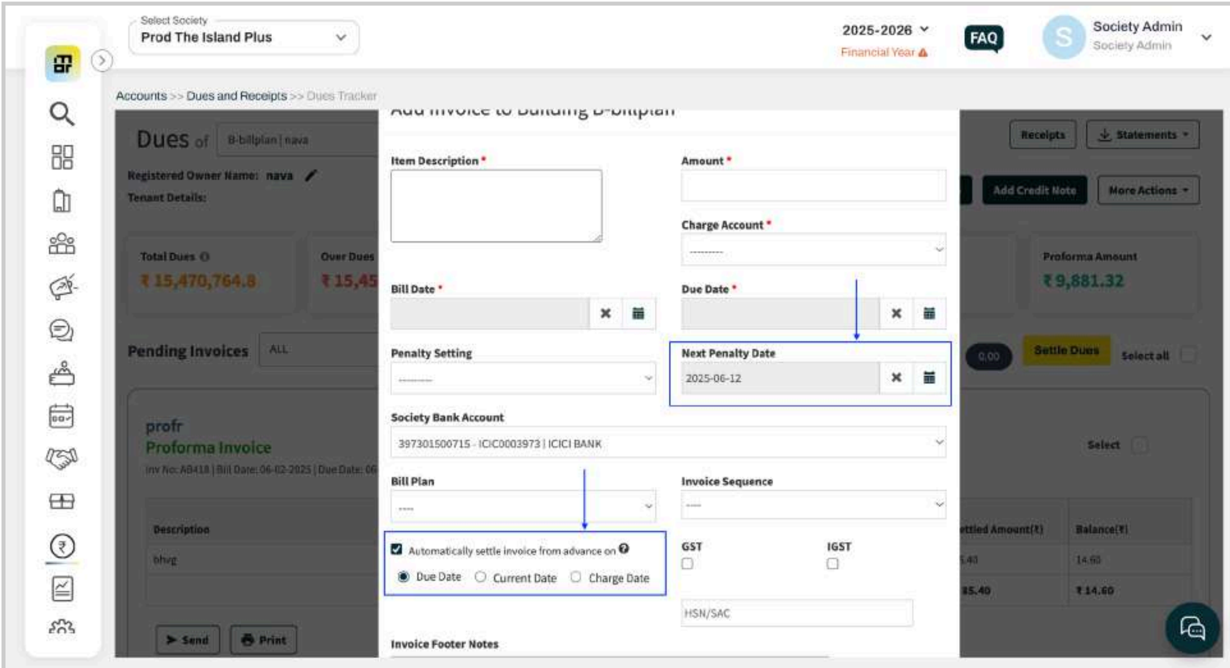
Path: Accounts >> Dues and Receipts >> Dues Tracker >> Choose a house >> Add invoice

While adding a single invoice for a particular flat, admins can now instantly settle the invoice using the resident's advance account balance on any of the following dates: the invoice's due date, charge date, or the current date. Previously, this flexibility was limited—settlement could only be recorded on the due date, requiring admins to manually create a receipt for instant settlement.

A new field to specify the first penalty date has also been introduced. This allows admins to configure a grace period and ensures accurate penalty scheduling based on society penalty configurations.

This functionality was already available when generating invoices in bulk through templates. With this update, single invoice creation now achieves feature parity with batch generation. This also provides the following benefits:

1. Saves time for admins by eliminating manual steps
2. Provides more control over settlement timing
3. Ensures consistency across invoice types, and improves accuracy in penalty application



ICICI PG integration for UPI Collection

With a goal of building a solution for same-day payout to societies, the payments team has onboarded ICICI bank as a PG partner for UPI payments. While the payment experience would stay the same for Mygate app users, this integration would allow the society to receive the funds the same day as the payment.

Given that UPI mode comprises 80% of the payments, the society would, practically, receive almost all of the funds on the same day. However, it is important to note the following :

1. Coverage is limited to UPI only. Funds from other modes of payment cannot be processed the same day.
2. ICICI PG integration is the first step towards same-day payout. Once this payment flow achieves stability, we will be working next to establish the desired payout channel.

Additional Updates

1. Snowman icon updated with detailed Helpdesk settings, including both creation and configuration views.
2. Kannada language support added for raising Helpdesk tickets through the MyGate app.
3. Tally export access extended to users with custom roles.
4. Success and failure payment pages revamped with a new UI, applicable across all modes except UPI.

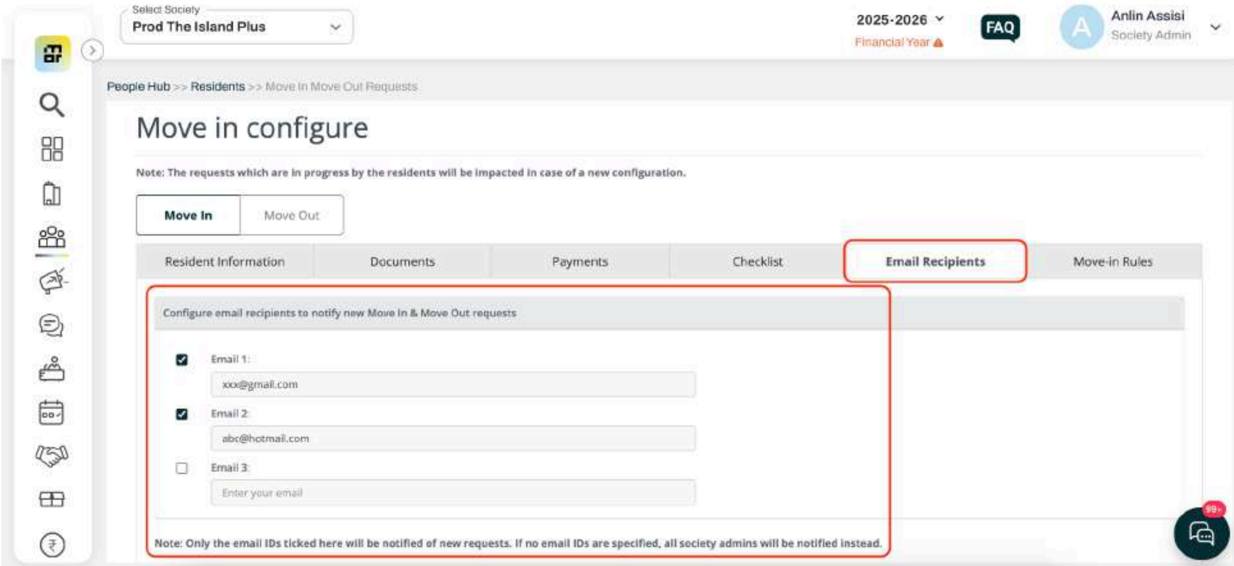
5. Final account reports (Balance Sheet, Trial Balance, Income & Expense) now support drill-down to detailed ledger views.
6. An internal monitoring tool was introduced to track invoice generation across active societies, helping ensure timely billing.

Security Dashboard Updates (May 2025)

Move-In Move-Out email recipients configuration

Path: People Hub >> Residents >> Move-IN Move Out Requests

A new email configuration feature has been introduced that gives society admins greater control over Move In and Move Out request notifications. Admins can now navigate to the MIMO configuration page and set up to 3 custom email addresses to receive notifications instead of sending alerts to all society admins by default. This new "Common" configuration tab allows admins to specify which email addresses should receive notifications and easily toggle them ON or OFF using checkboxes. When custom emails are configured and activated, only those recipients will be notified of new requests, while unconfigured societies will continue using the existing workflow of notifying all admins.
This enhancement addresses feedback from societies using shared email accounts for request management and provides more flexibility in notification routing.

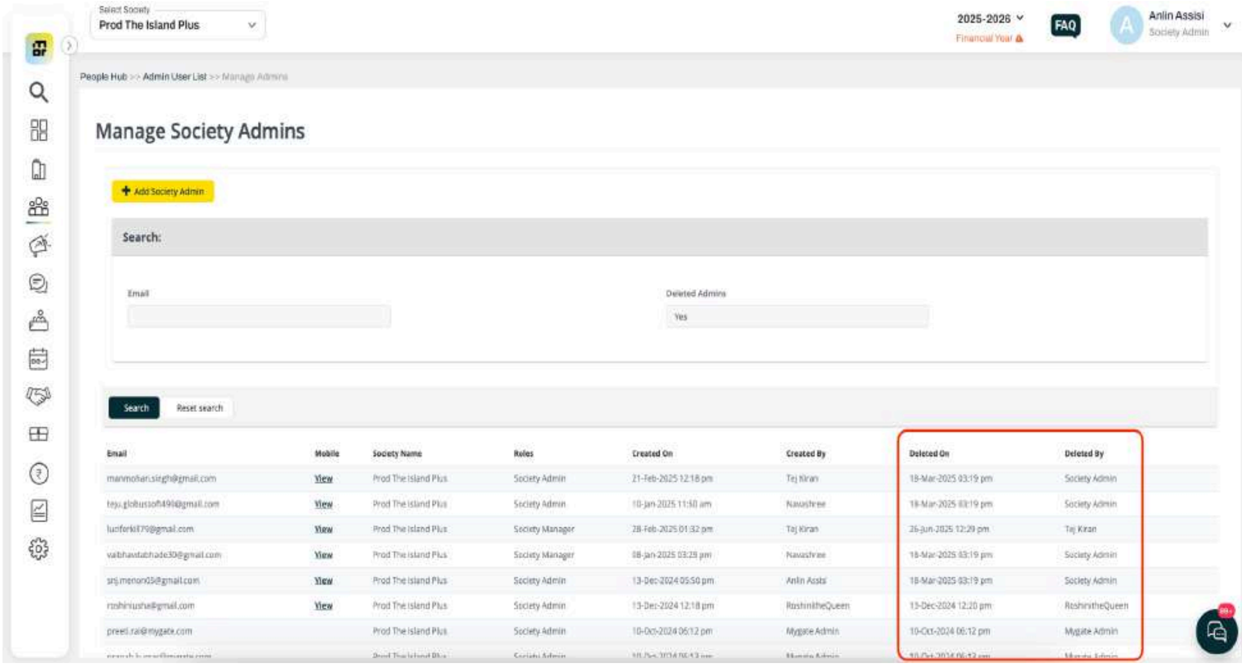


Deletion details enhancements in the Manage Admins page

Path: People Hub >> Admin User List >> Manage Admins

The deleted admin management experience has been improved by adding contextual columns to the admin listing pages. When the society admins apply the "Deleted" filter and select "Yes" on the Manage Admins page, two new columns, namely "Deleted On" and "Deleted By", will now appear in the listing to provide complete audit information about removed admins. These columns remain hidden in the default view to maintain a clean interface while ensuring critical deletion data is easily accessible when reviewing deleted admin accounts.

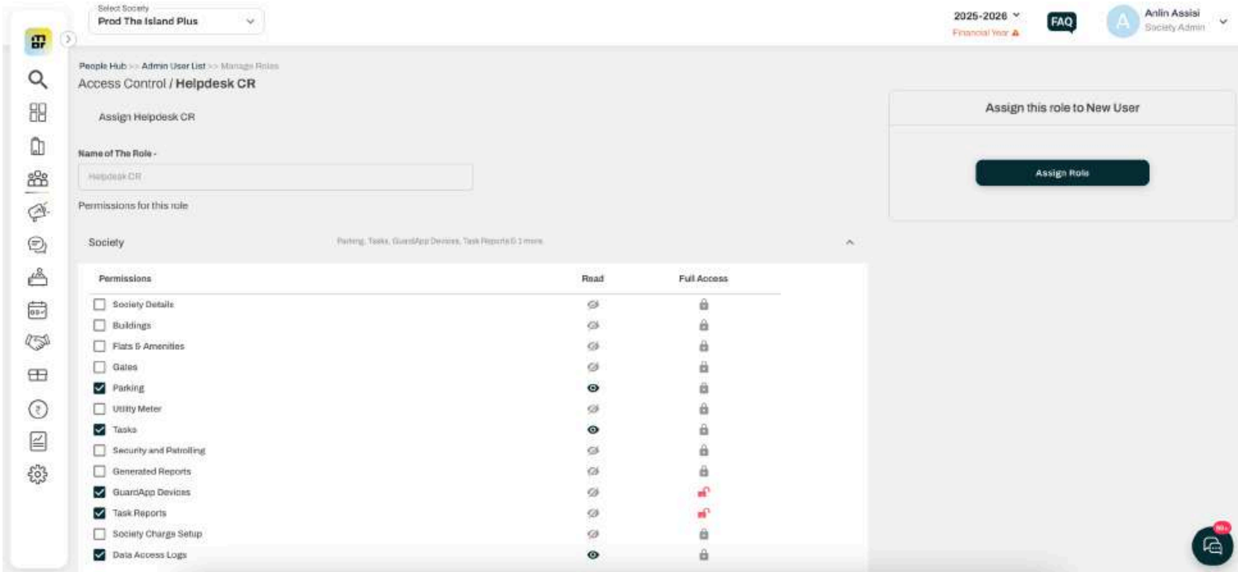
This enhancement helps in giving admins better oversight and accountability when managing admin user lifecycles across societies.

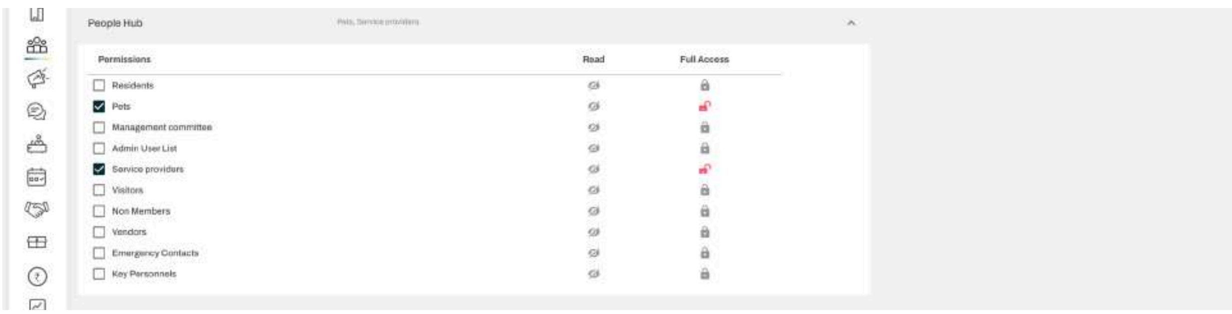


New module additions in the custom roles configuration form

Path: People Hub >> Admin User List >> Manage Roles

We have significantly enhanced the custom role configuration form by adding 11 new modules across the Society and People Hub menus, giving admins more granular control over user permissions. In the Society menu, we've added comprehensive Parking management (including Parking List, Guest Parking Report, and ANPR Vehicle In-Out report), along with GuardApp Devices, Tasks, Generated Reports, and Access Logs modules. The People Hub menu now includes Tenant Management and GDPR Deletion Requests under Residents, Pets module, and Duplicate Profiles management under Service Providers.
These additions allow society admins to create more precise custom roles tailored to specific operational needs, ensuring team members have appropriate access to the tools they need while maintaining proper security boundaries across different functional areas of the platform.



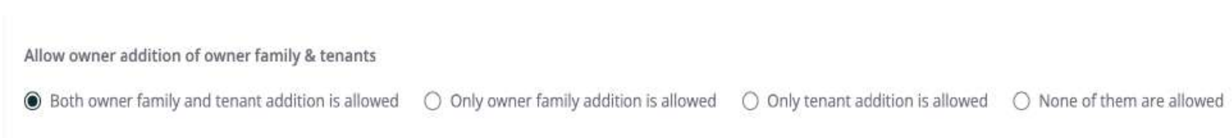


Society Setting bifurcation for Owner Family and Tenant addition from the app

Path: Manage Society >> Manage Society Details >> Society Settings

We have enhanced the owner addition controls by renaming the existing "Owner Family/Tenant Addition Allowed" setting to *"Allow owner addition of owner family & tenants"* and provided four specific options: Both allowed, Both not allowed, Only owner family addition allowed, and Only tenant addition allowed. The existing societies which had configured "Yes" in the previous settings will automatically convert to "Both allowed", while "No" has been changed to "Both not allowed," with all current configurations preserved and new societies defaulting to "Both allowed."

This enhancement directly addresses society feedback requesting the ability to permit owner family additions while maintaining admin oversight for tenant additions. Admins now have precise control over user permissions, improving both operational flexibility and security management.



Additional Updates

1. Parking list auto-deletion while deleting the building
2. Service provider profile visibility and hireability fixes
3. Manage Devices page enhancements to support eSSL onboarding
4. Society setting - ‘Customer Chat Support’ is enabled for all user types by default
5. Correction of inconsistency in guard on-duty data in the app admin console