ERP Dashboard Updates (Jan’ 2026)

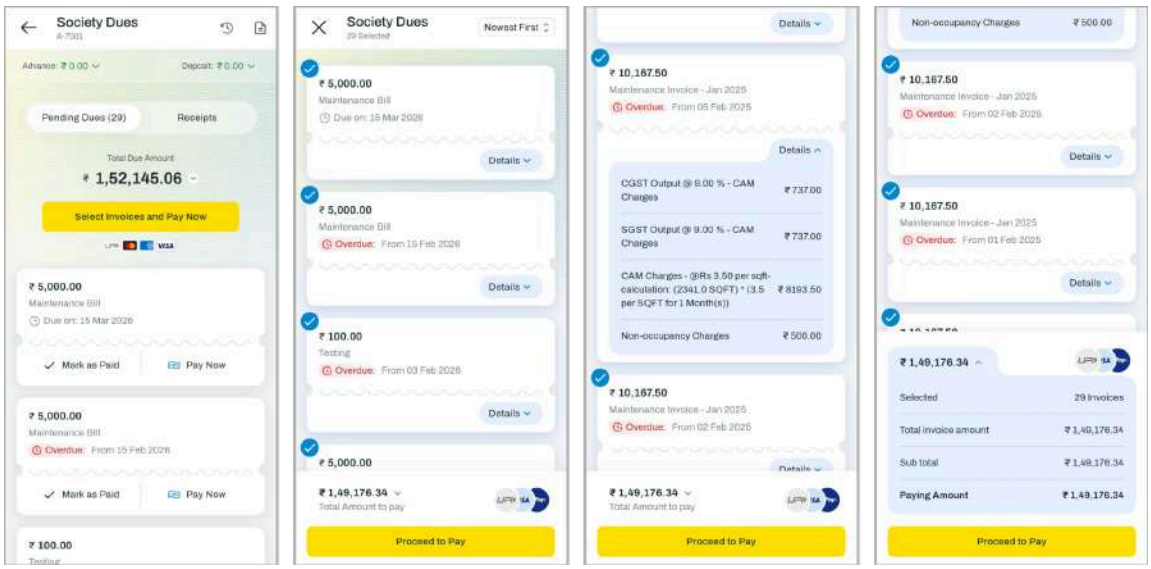
Key upgrades made to the ‘Society Dues’ module on the app

Path : App >> Community >> Society Dues
To improve the resident's experience while reviewing society bills and making payments, several updates have been introduced to the Society Dues module on the app.

1. Quick loading ‘Select Invoice to Pay’ flow

Residents who wish to pay multiple society bills in one transaction use the 'Select Invoice to Pay' flow. Previously, this button loaded a new page and had to fetch all pending bills again with their additional details. The architecture has now been revamped to seamlessly transition the listing page to the selection flow, achieving a 10x faster page load performance for a smoother payments experience.

Invoices are now pre-selected by default, allowing residents with just two or three invoices to complete their payment quickly. Those who wish to review bill details or deselect specific invoices before payment can do so conveniently on the same screen. Overall, this brings the following benefits -
• Significantly faster loading when selecting multiple invoices to pay
• Pre-selected invoices save time for quick payments
• Smoother, more intuitive interface for managing bill payments



2. Common Visibility of Invoices in umbrella societies

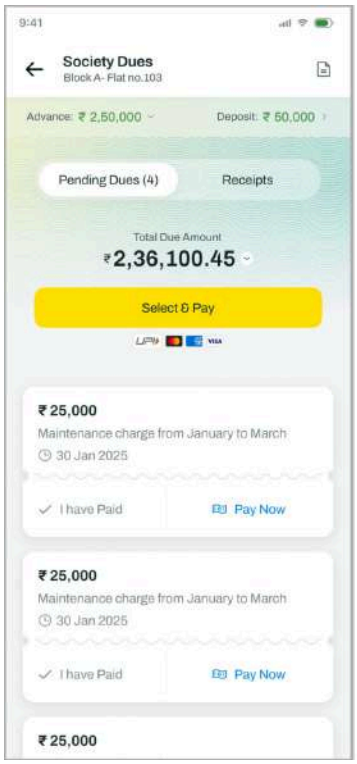
For large townships with two or more RWAs within the same campus, the umbrella model is used for flexibility in separated invoicing, helpdesk, and other operations. However, this creates two flats in the resident app - one for the parent society and another for the child society. When both societies send invoices, it becomes difficult for residents to discover all their bills without switching between flats. This update solves the problem by displaying bills from both billers in either society.

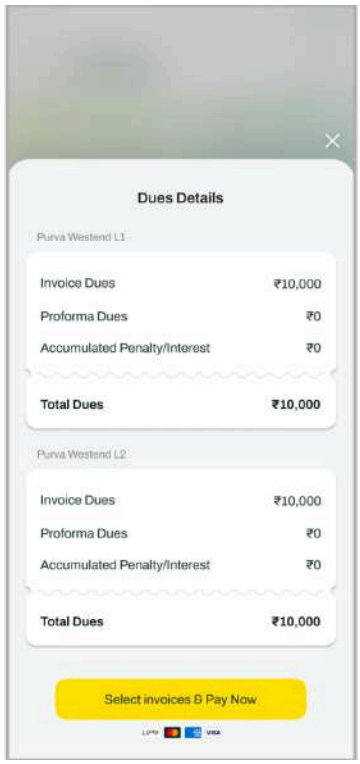
The changes are as follows :

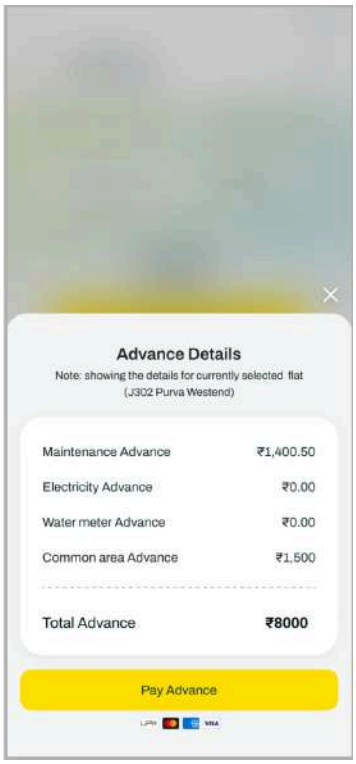
a. Invoices from both parent and child societies are now visible in either society view. Biller information is not shown on invoice cards to maintain equal visibility for all bills.

b. The total due amount displayed at the top now combines pending invoices from both the parent and child societies. Residents can tap on this amount to see how the dues are split between billers.

c. In the 'Select Invoice to Pay' flow, residents can choose multiple invoices from the same biller and complete payment in one go. However, invoices from different billers must be paid in separate transactions.







*Note - Although invoices from one biller are visible and payable through another society, the receipts and payouts are handled correctly through the backend system.

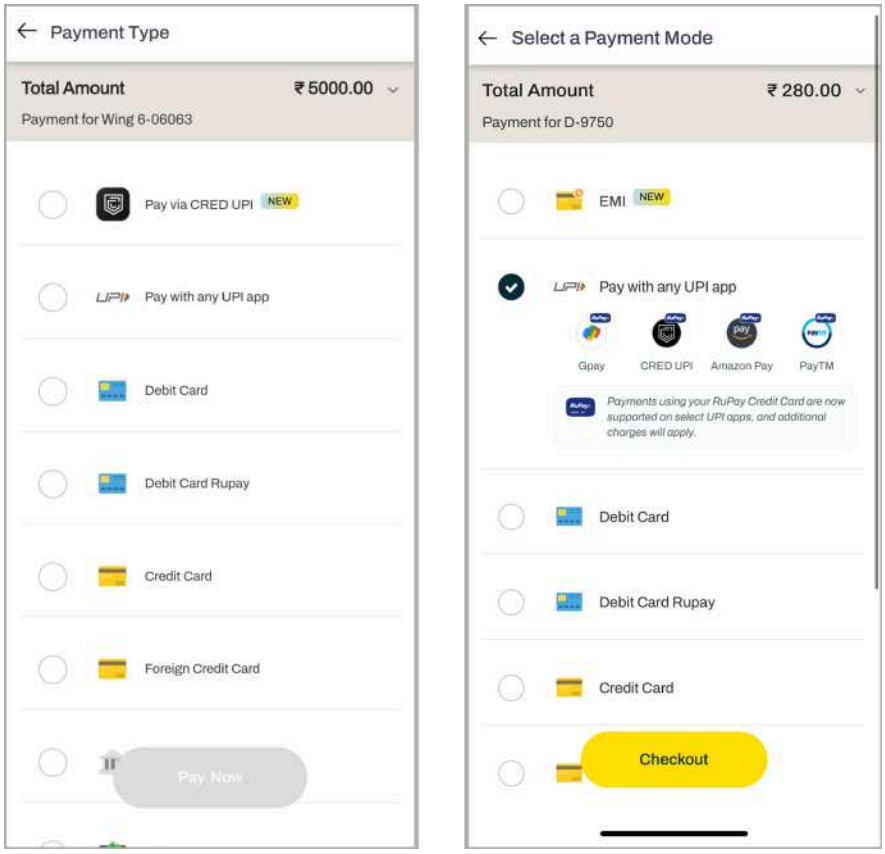
3. Make UPI payments using Rupay Credit Cards

The option to make UPI payments using a Rupay Credit Card has been available to a limited number of societies for some time. However, due to no special messaging on the interface, actual usage of this method has been low. A Rupay CC label now appears on UPI apps that support this payment method, making it easier for residents to identify and use this option.

This allows residents to:

• Easily spot which UPI apps that support Rupay Credit Card payments

• More flexibility in choosing payment methods for society dues



Automated Credit Notes against invoice items (after GST calculation)

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

The option to pass cash discounts against invoice items during generation has always been available in Mygate ERP. This flow applies the credit amount before GST calculation, without passing a proper credit note voucher. CAs who are confident about their exact GST liabilities use this method to pay lower amounts to the authorities. However, in cases of rebates where GST implications are not fully calculated, CAs prefer

to err on the side of caution and pay more GST to the authorities. This update enables automatic credit notes after GST calculation on line items to address such scenarios.

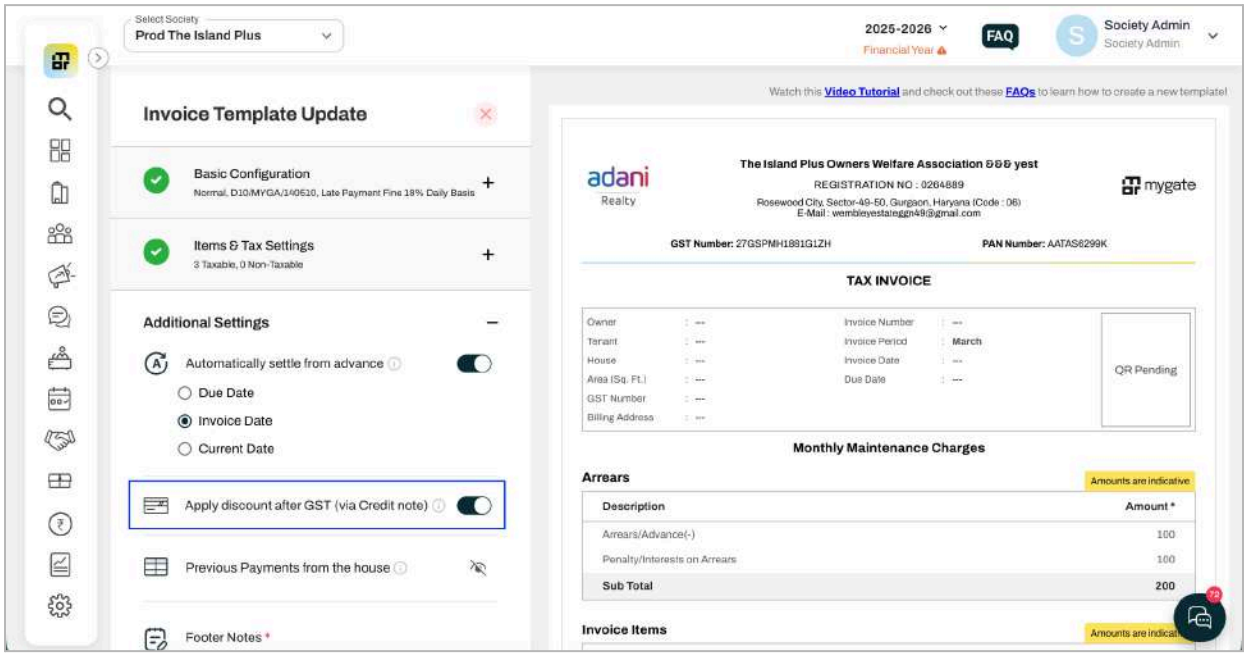
Treasurers who wish to activate this workflow can update the setting for "credit note after GST calculation" in the invoice template's additional settings. Once enabled, the system will automatically pass a credit note after calculating GST on the line item.

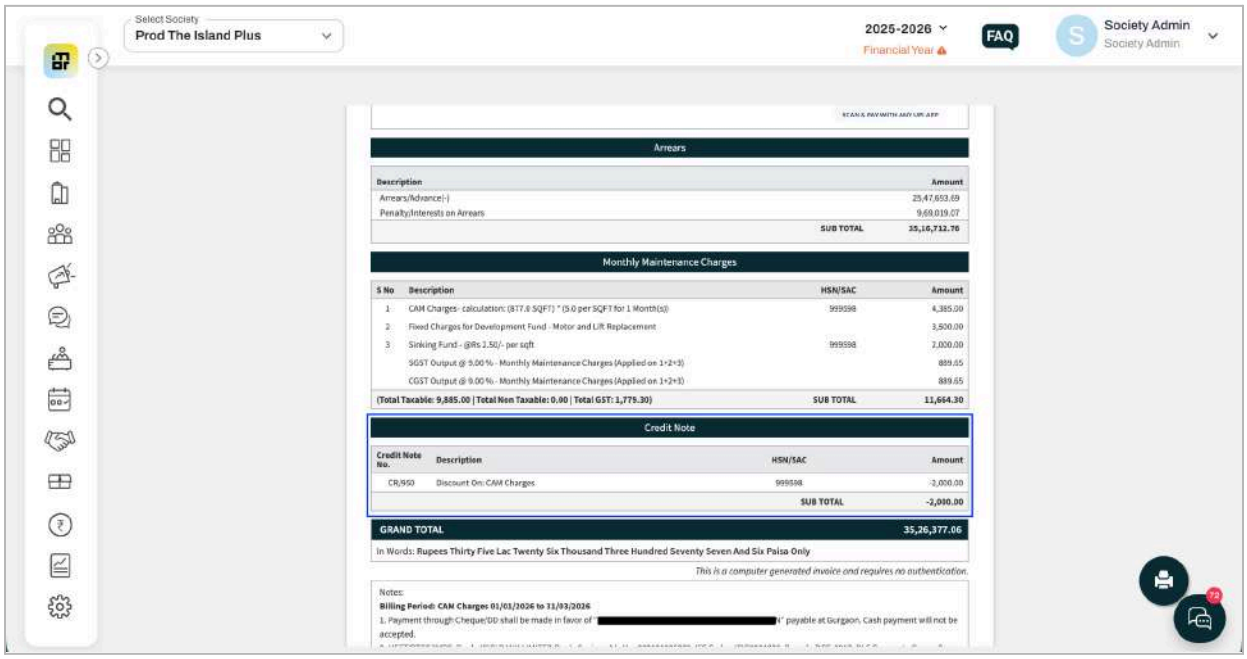
For CAs and Treasurers:

• Choose the appropriate credit treatment based on GST calculation confidence

• Ensure compliant accounting treatment for rebates and discounts

• Automate credit note generation without manual voucher entries





*Note - The above workflow is society setting based. Kindly reach out to your RM for activation.

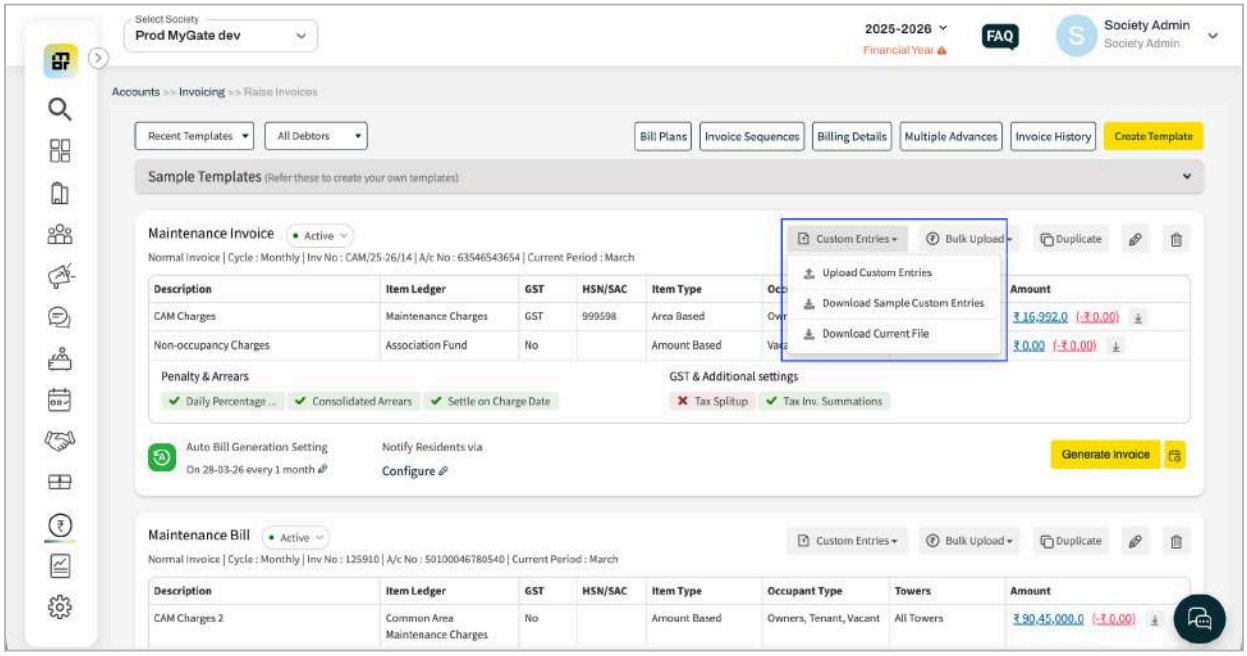
Support for 4 Custom Entries on the invoice PDF

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

Custom entries are a useful way to publish variable house-level details on the invoice PDF, such as House Meter Number, Energy Load Value, or PAN Number. Previously, only 2 such entries with their titles and descriptions could be accommodated. The limit has now been increased to 4 custom entries to support the requirements of most societies.

This would allow the accounts team to:

- Display more house-specific information directly on invoice PDFs
- Better documentation of unit-level details for resident reference



sample_custom_entries_upload (6)

Sl No	House	Custom Entry 1 Title	Custom Entry 1 Description	Custom Entry 2 Title	Custom Entry 2 Description	Custom Entry 3 Title	Custom Entry 3 Description	Custom Entry 4 Title	Custom Entry 4 Description
1	100	Meter No	12765| Grid Load : 5 kVA	Disconnection Date	31-10-21	Reconnection Date	15-11-21	Billing Cycle	Monthly
2	200	Meter No	12766| Grid Load : 2.5 kVA	Disconnection Date	30-11-21	Reconnection Date	15-12-22	Billing Cycle	Monthly
3	201	Meter No	12767| Grid Load : 7.5 kVA	Disconnection Date	31-12-21	Reconnection Date	20-01-22	Billing Cycle	Monthly

Key updates to manage the society's amenities smartly!

Managing amenity bookings is now smarter with automatic cancellation of unpaid bookings within hours and the ability to configure captcha settings at the individual amenity level for better control.

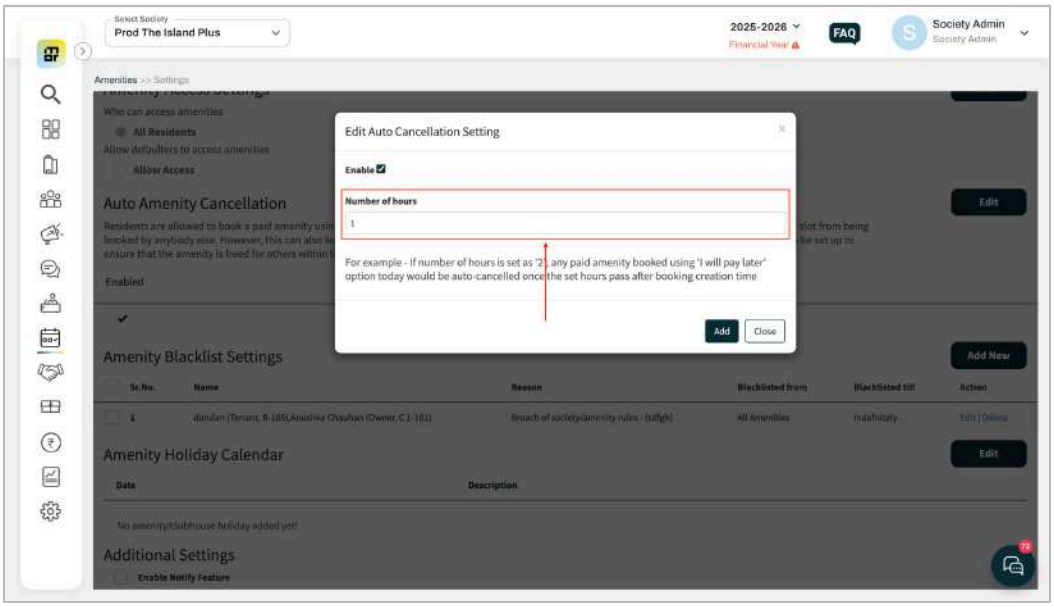
1. Auto-cancellation of booking within hours on non-payment

Path: Amenities >> Settings

The Auto-Cancellation setting in Amenities has been enhanced to provide more flexibility and control.

Earlier, admins could configure auto-cancellation only in terms of days. With this update, the setting now supports hours, allowing more precise control over unpaid bookings.

If a booking remains unpaid, the system will automatically cancel it based on the configured time (in hours). This helps prevent slot blocking, ensures better availability management, and gives admins greater control over amenity usage.



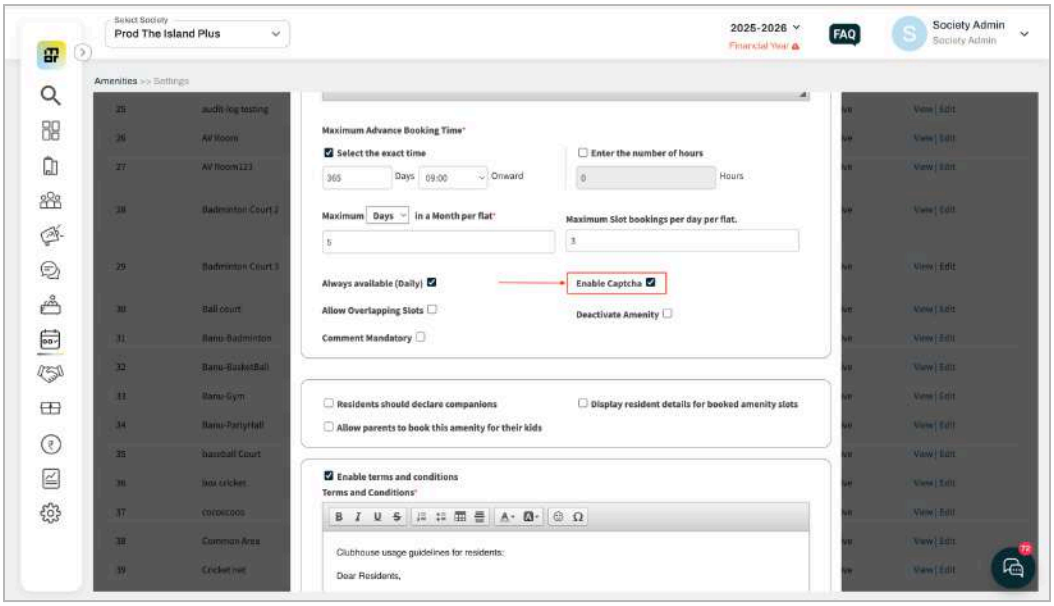
2. Amenity-level captcha configuration for better flexibility

Path: Amenities >> Settings

Society admins now have the flexibility to enable Captcha for specific amenities.

Earlier, Captcha was automatically enabled for all free amenities by default. With this update, admins can choose whether to enable or disable Captcha for each free amenity individually, giving them better control over the booking experience.

*Note: This setting is only available for free amenities



Track & Manage Saarthi App usage by society staff efficiently

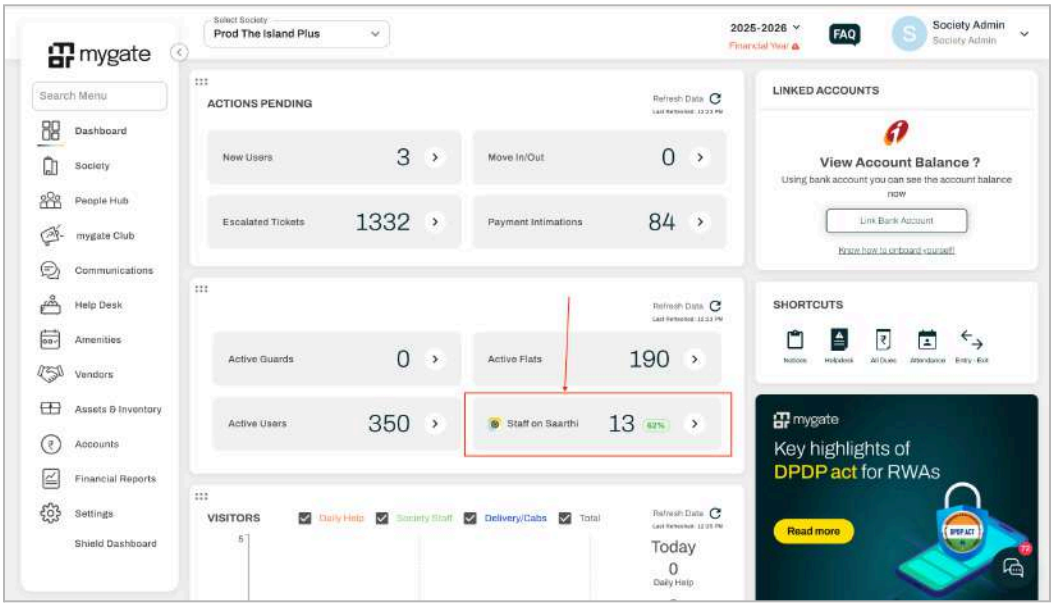
Track Saarthi App adoption with a new usage widget on the dashboard homepage, easily identify which staff members are using the app during task assignment, and enable all technician staff to create tickets directly from the app.

1. Saarthi App usage widget on the dashboard homepage

Path: Dashboard >> Homepage

A new Saarthi Adoption widget has been added to the Society Dashboard.

This widget displays the total number of society staff who have downloaded the Saarthi app, along with the overall adoption percentage. It gives admins a quick snapshot of adoption levels, making it easier to drive higher staff participation and ensure smoother day-to-day operations through Saarthi.

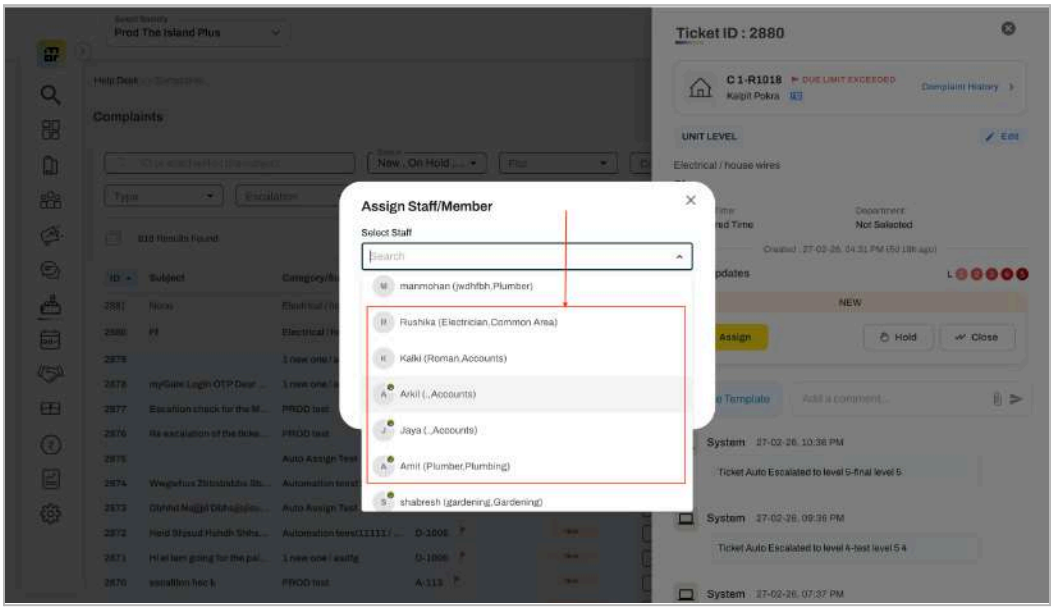


2. Easy identification of society staff using Saarthi App during assignment

Path: Helpdesk >> Complaints >> Ticket Assignment

Helpdesk Managers and Admins can now quickly identify which staff members are active on the Saarthi app while assigning tickets.

A Saarthi icon will be displayed next to the profile of staff members who have the app, making it easier to assign tickets to digitally enabled staff.
This helps ensure faster communication, smoother ticket handling, and better resolution efficiency.



3. ‘Create Ticket’ option enabled for technician staff in all societies

Path: Helpdesk >> Settings >> Saarthi Settings

All Saarthi-enabled staff can now create tickets directly through the Saarthi app.
Earlier, this functionality was controlled through a setting-based configuration. With this update, the feature has been enabled for all Saarthi-enabled staff by default

Purchase Management made easy through automation!

Reduce manual work in purchase management with auto-filled terms & conditions in documents, vendor bills that auto-populate from tagged purchase orders, and automatic notifications to keep admins informed of pending approvals.

1. Auto-fill of ‘Terms & Conditions’ in purchase documents

Path: Accounts >> Purchasing >> Purchases >> Create Form

Terms and conditions on purchase documents sent to vendors (such as RFQ and PO) are generally standardized for various departments. Accountants in large societies send out around

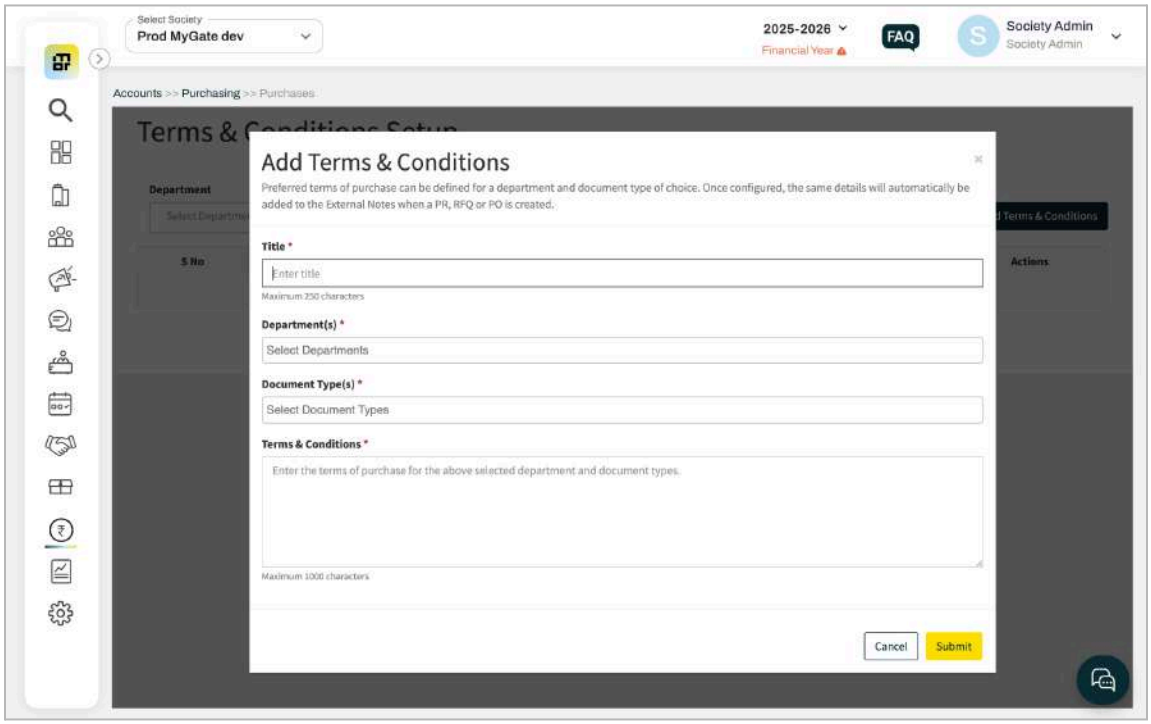
100 such documents every month, and inputting these additional notes manually every time is not only time-consuming but also error-prone.

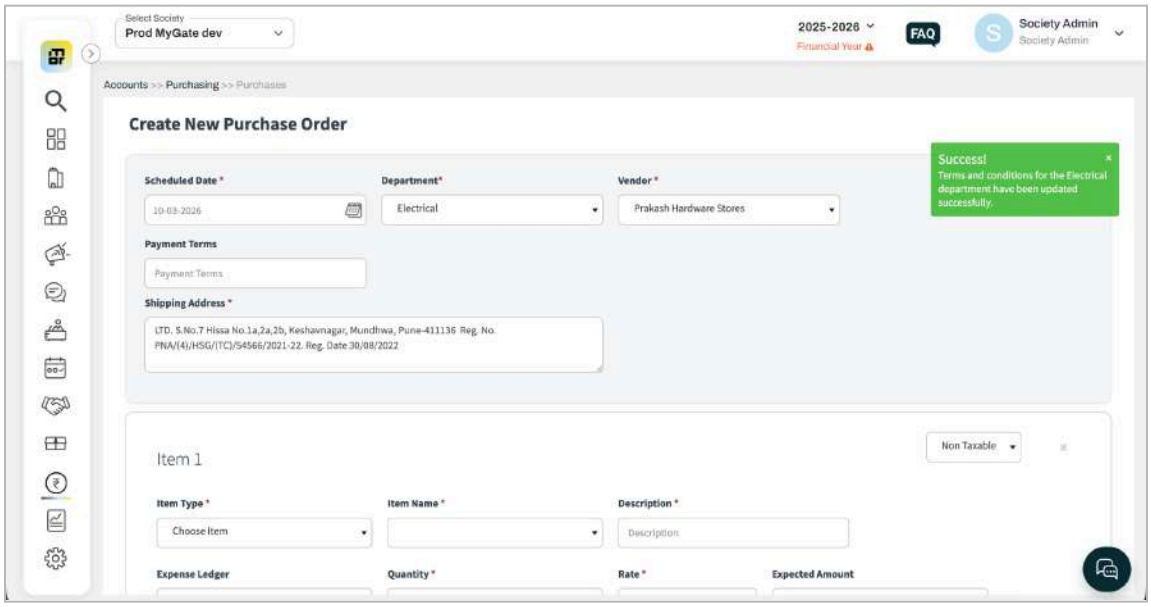
A new 'Terms & Conditions' feature has been introduced within the purchase module. Society admins can configure standard terms with the flexibility to choose the desired department and document type (PR, RFQ, or PO) for better control. Once configured, the pre-set terms automatically fill in the External Notes section when the accountant selects a department during purchase document creation. The accountant can update the terms if needed before saving the form.

For Accountants:

• Save time by eliminating repetitive manual entry of standard terms

• Reduce errors with consistent, pre-configured terms and conditions





2. Auto-fill the Vendor Bill Form by tagging the Source PO

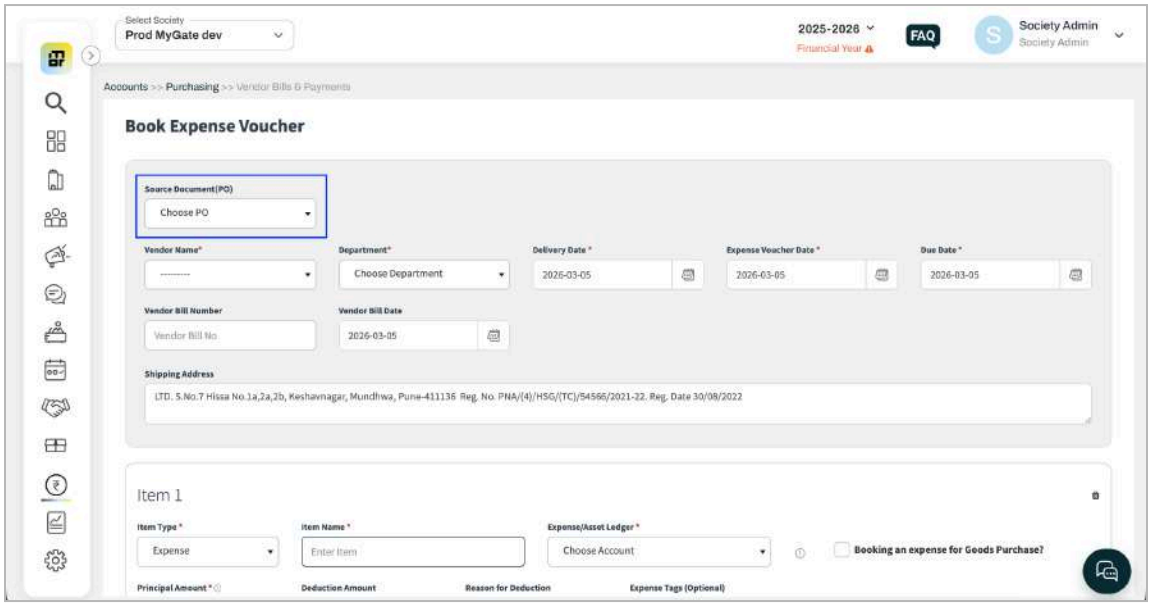
Path: Accounts >> Purchasing >> Vendor Bills & Payments >> Book Vendor Bill

Booking a vendor bill can be complicated, especially with multiple items, deductions, or TDS involved. Each bill requires complete focus from the accountant and considerable time. This update automates the process through a single click by selecting the source purchase order.

If the society is already using the purchases module to issue purchase orders, key details such as department, item type, item name, quantity, unit of measurement, amount, and expense tags are already captured. If material receiving notes (MRN) are also recorded, any deductions are available as well. A source document selection option has been added at the top of the expense voucher form. The accountant can choose the right PO, and most inputs within the form will automatically fill. This action also creates a linkage between the purchase order and vendor bill for easier tracking and validation.

For Accountants:

- Save significant time by auto-filling vendor bill details from the source PO
- Reduce data entry errors with information pulled directly from approved documents
- Better tracking with automatic linkage between purchase orders and vendor bills

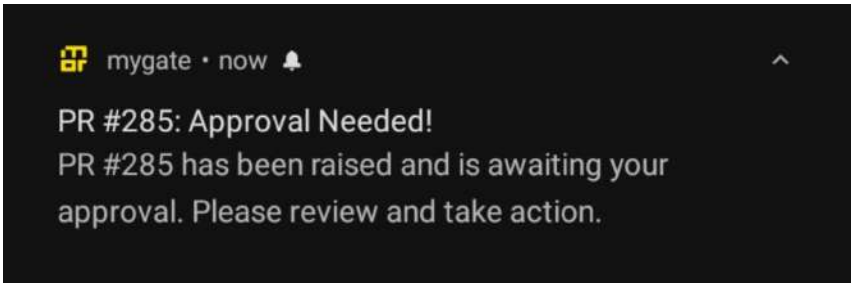


3. Notifications to Admins about Pending Purchase Approvals

Path: Resident App >> Admin Console >> Purchase Approvals

Admins can now manage and take action on approval requests directly from the Admin Console.

With this update, a push notification will be triggered whenever a new approval document requires attention. This ensures that important requests are not missed and allows admins to review and approve/reject documents promptly, leading to faster decision-making and smoother operations.



Simplifying an accountant's daily work on Mygate ERP

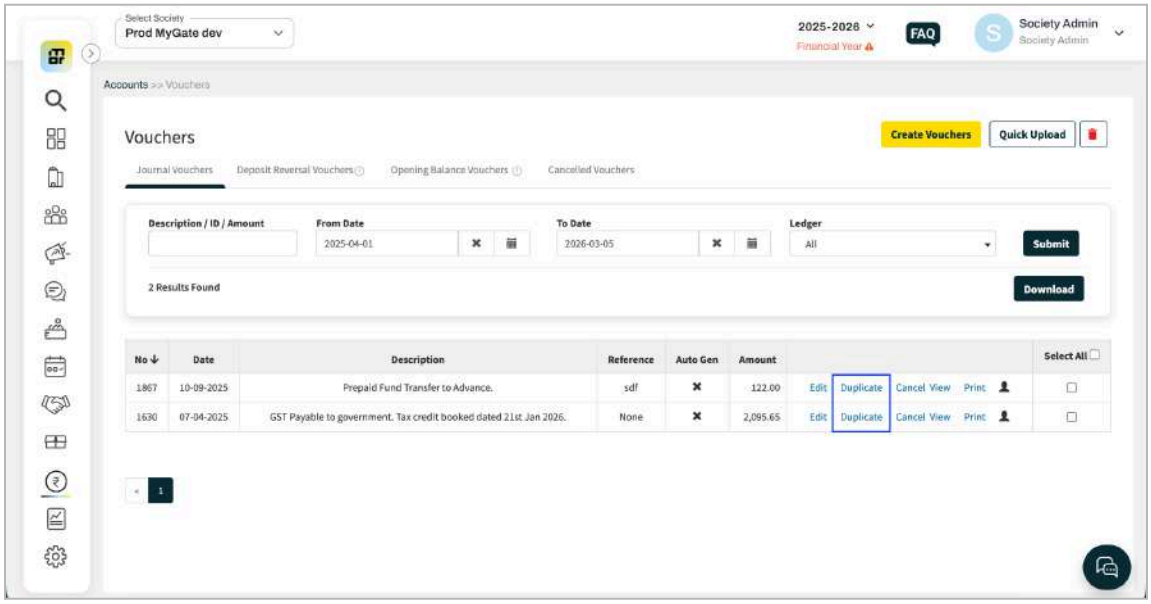
Streamline routine accounting with quick JV creation through duplication, period-wise ledger summaries now visible at the top of detail pages, and enhanced invoice history reports with additional details for easier tracking and analysis.

1. Book JVs quickly by duplicating an existing one

Path: Accounts >> Vouchers

One of the effective ways to speed up an accountant's daily work is to allow duplicating existing transactions. This lets accountants copy previous inputs, change a few details as needed, and book the transaction. Mygate ERP already allows duplication of expense vouchers, invoice templates, purchase requests, and more. On popular demand, this option has now been added to the vouchers module as well.

This helps accountants:
• Save time on recurring journal vouchers by duplicating instead of creating from scratch
• Reduce errors by reusing verified transaction structures

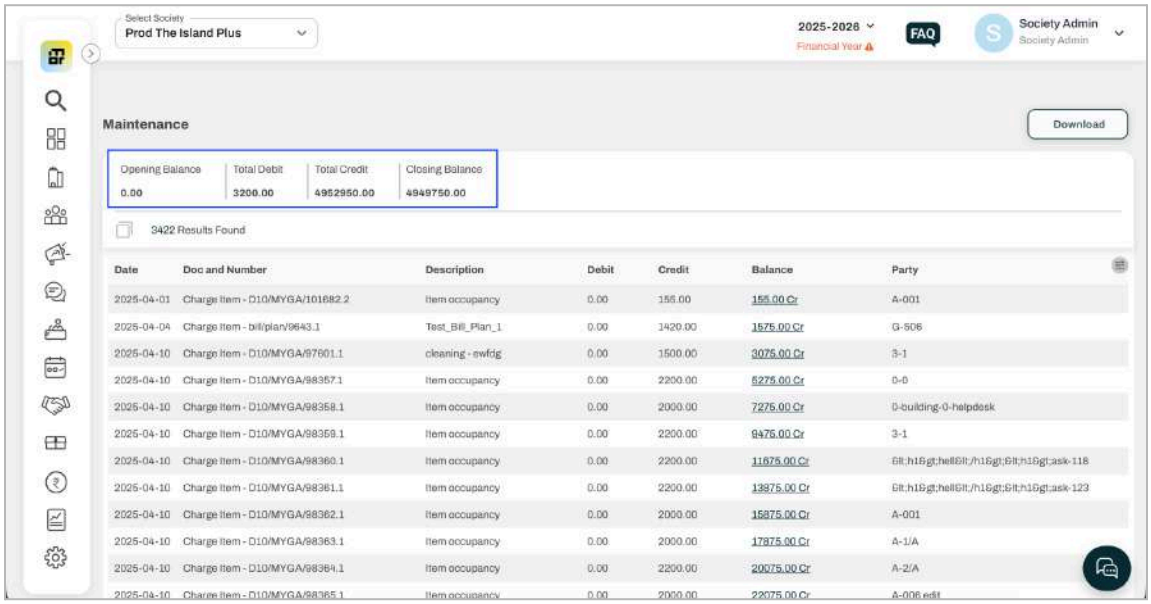


2. Ledger Summary for the selected period at the top of the detail page

Path: Financial Reports >> Ledgers >> Ledger Reports >> Ledger Detail Page

Ledger Reports is a key module used by accountants to pull ledger statements and by CAs to audit accounting entries. To maintain the chain of thought when drilling down to the detailed entry log for a ledger, the period's summary is now displayed at the top, including the opening balance, debit amount, credit amount, and closing balance.

For Accountants and CAs:
• Better context while reviewing detailed transactions
• Faster reconciliation with summary visible alongside entry details



3. Additional details in the invoice history report for easier analysis

Path: Accounts >> Invoicing >> Invoice History >> Report Download

Invoice History report helps accountants track collections against bills raised and chase defaulters who are yet to pay. To make this process easier, a few more columns have been added to this download. These include Due Date, Discount offered during invoicing, Balance Due for each house, and Ageing of the overdue amount, if any.

For Accountants:

• Better visibility into payment timelines with due dates and ageing information

• Easier identification of high-priority follow-ups based on overdue ageing

Invoice Date	Due Date	Invoice No	Invoice Type	CGST Output	SGST Output	Discount	Invoice Total	Current Balance (Rs)	Ageing (Days)
25/01/2026	09/02/2026	bill/plan/14225	Normal Invoice	0	0		1	1	40
25/01/2026	28/01/2026	AB13271	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13206	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13207	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13209	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13210	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13211	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13212	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13213	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13214	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13215	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13216	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13217	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13218	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13219	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13220	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13221	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13222	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13223	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13224	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13225	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13226	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13227	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13228	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13229	Normal Invoice	1	1		12	12	40
25/01/2026	28/01/2026	AB13230	Normal Invoice	1	1		12	12	40

Continued expansion of audit logs across the ERP software

Path: Accounts >> Audit Logs

The Audit Logs have been further enhanced to improve visibility and tracking across key modules.

Create, update, and delete actions are now captured for the following additional modules:

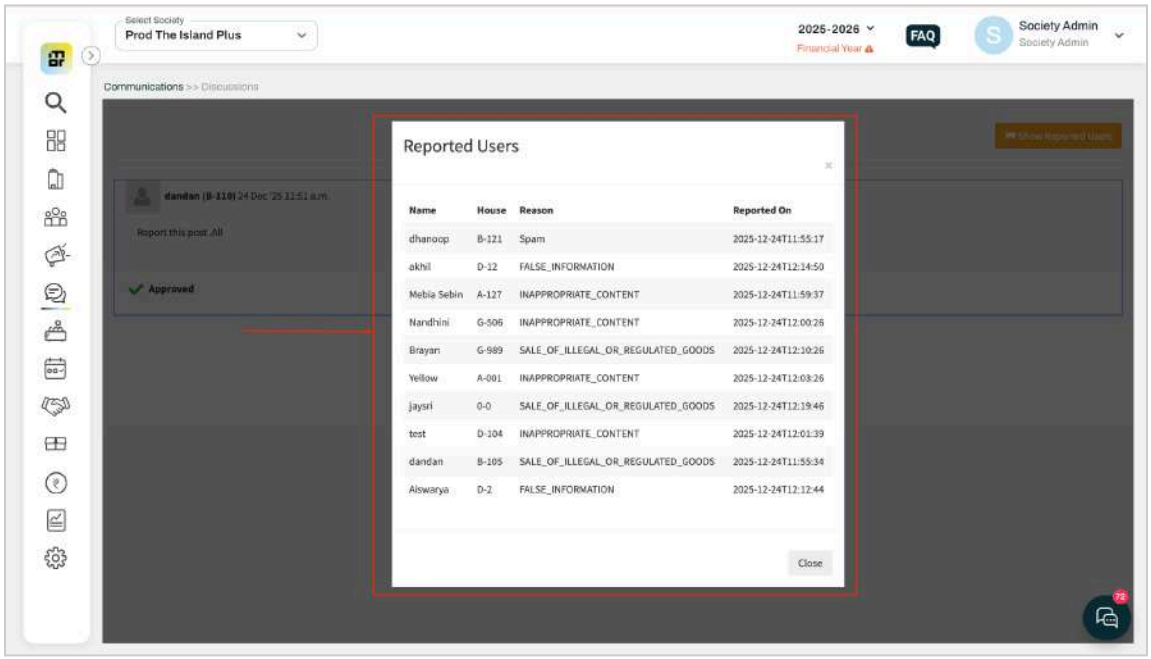
1. **Template Creation and Invoicing** – Track changes made to templates and invoice configurations.
2. **Chart of Accounts Configurations** – Monitor updates to chart of accounts configurations.
3. **Threshold-Based Auto-Approval of Purchases** – View configuration changes related to purchase auto-approval limits.

Option to view user reports against discussion posts

Path: Communications >> Discussion >> Post Detail Page

Admins can now view reported posts on the dashboard along with additional details about who has reported the post along with the reason for reporting.

This added visibility provides better context around each report, enabling admins to understand the concern more clearly and take quicker, well-informed moderation decisions.


Select Society
Prod The Island Plus
2025-2026
Financial Year
FAQ
Society Admin
Society Admin
Communications >> Discussions
Reported Users
Name
House
Reason
Reported On
dhanoop
B-121
Spam
2025-12-24T11:55:17
akhil
D-12
FALSE_INFORMATION
2025-12-24T12:14:50
Mebia Sebin
A-127
INAPPROPRIATE_CONTENT
2025-12-24T11:59:37
Nandhini
G-506
INAPPROPRIATE_CONTENT
2025-12-24T12:00:26
Brayan
G-989
SALE_OF_ILLEGAL_OR_REGULATED_GOODS
2025-12-24T12:10:26
Yellow
A-001
INAPPROPRIATE_CONTENT
2025-12-24T12:03:26
jaysri
0-0
SALE_OF_ILLEGAL_OR_REGULATED_GOODS
2025-12-24T12:19:46
test
D-104
INAPPROPRIATE_CONTENT
2025-12-24T12:01:39
dandan
B-105
SALE_OF_ILLEGAL_OR_REGULATED_GOODS
2025-12-24T11:55:34
Aiswarya
D-2
FALSE_INFORMATION
2025-12-24T12:12:44
Close
Approved