Socivio

COMPLETE USER GUIDE

Run your society from the web and your phone

Step-by-step instructions for every module of the Socivio website and Android app, for admins, accountants, guards and residents.

Website · Android app · Every role

socivio.in

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57 CHAPTERS

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Find any module quickly. Every chapter explains the website and the Android app side by side.

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01

PART 1

Getting started

Sign in, install the app and learn how every screen works. Read this part first; it explains the patterns used everywhere else.

- Welcome to Socivio
- Signing in and registering
- Installing the Android app
- A tour of the website
- A tour of the Android app
- Lists, search, filters and export
- Adding, editing and deleting
- Notifications
- Your profile and password
- Roles and permissions

GETTING STARTED

Welcome to Socivio

Socivio is one place to run a residential society: residents, flats, bills and payments, visitors, complaints, notices, events and much more. Everything you do on the website appears in the Android app and the other way round, because both use the same account and the same data.

Who is this guide for?

IF YOU ARE…	START WITH…
A resident	Chapters 2, 3, 5 and 8, then the modules you use: Bills, Visitors, Helpdesk, Marketplace, Amenities.
Society admin	The "First week for a new admin" playbook, then People & Property, Finance and Settings.
Accountant	Maintenance Bills, Payments & Receipts, Expenses and the "Month-end" playbook.
Security guard	Visitors, Parcels, SOS Alerts and the "Gate shift" playbook.

How each chapter is organised

- **Where to find it** – the exact menu path on the website and in the app.
- **What it is for** – a plain description and who uses it.
- **Who can do what** – permissions for each role.
- **Fields explained** – every box on the form, which are required (*) and what to type.
- **Step by step** – side by side: website on the left, app on the right.
- **Notifications** – who is told when something happens.

Website and app, same account
You can start something on the website and finish it on your phone. Sign in with the same email and password in both places.

Words used in this guide

TERM	MEANING
Record	One entry in a list, for example one visitor, one bill or one notice.
Status chip	The coloured pill showing where a record stands (Pending, Approved, Paid…). Tap a chip above a list to filter by it.
Panel	On the website, forms open in a panel that slides in from the right.
Bottom bar	In the app, the floating bar at the bottom with Home, your favourite screens and Menu.
Push notification	A message on your phone's screen, even when the app is closed.

GETTING STARTED

Signing in and registering

Everyone signs in with an **email address and a password**. New residents register themselves and wait for the society admin to approve them. Team members (accountants and guards) and admins are created for you.

Register as a new resident

ON THE WEBSITE

1. Open **socivio.in**, click **Sign in**, then **Create an account**.
2. Choose your **Society** and your **Flat**.
3. Enter **Full name**, **Phone** and **Email**, choose whether you are an **Owner** or **Tenant**, and set a **Password**.
4. Click **Submit registration**. You will see that approval is pending.
5. When the admin approves you, you receive a notification and can sign in.

IN THE ANDROID APP

1. Open the app and tap **New resident? Create an account** on the sign-in screen.
2. Choose society and flat, then fill in name, phone, email, owner/tenant and a password.
3. Tap **Submit for approval**. A **Request sent** message reminds you that the admin must approve the account.
4. After approval, sign in with your email and password.

Sign in

ON THE WEBSITE

1. Go to **socivio.in** and click **Sign in**.
2. Type your email and password and press **Sign in**.
3. You land on your **Dashboard**.

IN THE ANDROID APP

1. Open **Socivio** and type your email and password.
2. Tap **Sign in**. The first time, allow notifications when asked.
3. You land on your **Home** dashboard.

Sign-in checks the red messages

If a box turns red, read the small message under it. It tells you exactly what to fix, for example "Enter a valid email address".

Cannot sign in?

If your account is still **Pending** the admin has not approved you yet. If it is **Inactive**, ask the admin to activate it. Check your email spelling first.

GETTING STARTED

Installing the Android app

The Socivio Android app gives you the same features as the website plus **phone notifications** for notices, visitors, bills, SOS and complaints.

Install

1. On your phone open **socivio.in** and go to the **Download** page.
2. Tap **Download for Android**. Your browser saves a file called **socivio.apk**.
3. Open the downloaded file. If Android asks, allow **Install unknown apps** for your browser (one time).
4. Tap **Install**, then **Open**.
5. Sign in. When asked **Allow Socivio to send you notifications?** tap **Allow**.

Update the app

When a new version is available the app shows an **Update available** box with **Later** and **Update now**. Tap **Update now**, install the new file the same way and your data stays as it is. Urgent updates can be compulsory: the app asks you to update before you can continue.

If the internet is slow or gone

The app shows a friendly **offline page** with tips and keeps trying to reconnect by itself. If your mobile data pack is finished, switch to Wi-Fi and the app resumes without signing you out. Lists that could not load show a **Tap to retry** button.

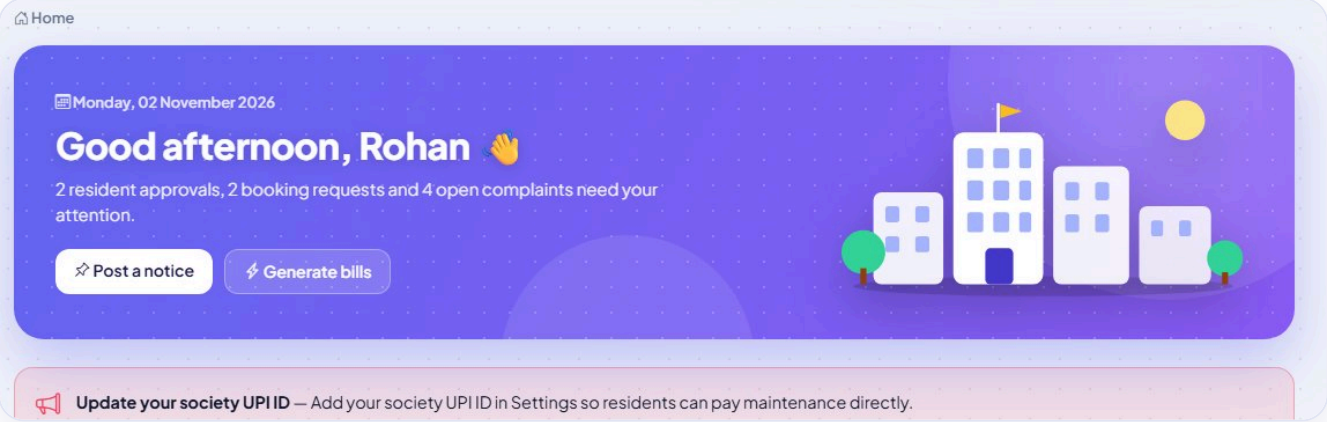
Notifications not appearing?
Open Android **Settings** → **Apps** → **Socivio** → **Notifications** and make sure they are turned on. On some phones also allow the app to run in the background.

GETTING STARTED

A tour of the website

After you sign in, the website is organised around a **sidebar** on the left, a **top bar** and the **page** in the middle.

AREA	WHAT YOU USE IT FOR
Sidebar	Every area you may use, grouped into sections such as People & Property, Community, Gate & Services, Finance and Operations. You only see what your role allows.
Top bar	The **bell** shows unread notifications; your **name** opens the profile and sign-out.
Dashboard	A summary for your role: cards with key numbers, charts and the latest records. Click a card to jump to the details.
Page header	The title, number of records, the **Export** button and the **+ Add** button.
Quick actions	For residents: shortcuts to raise a complaint, pre-approve a visitor, book an amenity or post a listing.



The dashboard summarises what matters for your role.

Use it on a phone browser too

The website adapts to small screens, but for daily use on a phone the Android app is faster and sends notifications.

GETTING STARTED

A tour of the Android app

The app is built around a floating **bottom bar**. The highlighted tab shows its name; the others show only an icon.

PART OF THE SCREEN	WHAT IT DOES
Home	Your dashboard: a greeting card, **Quick actions** for common jobs and **Overview** cards with live figures. Pull down to refresh.
Favourite tabs	Residents get Bills, Visitors and Helpdesk; admins get Residents, Bills and Helpdesk; accountants get Bills, Payments and Expenses; guards get Visitors, Parcels and SOS.
Menu	The last tab opens the full list of screens, grouped by section. Your photo, name and Sign out are here too.
Bell	Top right of most screens. Shows how many notifications are unread.
Search and filter	On every list: a search bar, a filter button (a dot shows an active filter) and status chips with counts.
Add button	The round **+ Add** button at the bottom right of lists where you may create records.

Quick actions on Home

ROLE	SHORTCUTS
Resident	Pay bills · Pre-approve a visitor · Complaint · Market · Events
Admin	New notice · Residents · Bills · Events · Helpdesk
Accountant	Bills · Payments · Expenses
Security	Visitors · Parcels · SOS

Opening a record

Tap any card to see all its details. The top bar shows a **pencil** (edit) and a **bin** (delete) when you are allowed to use them, and action buttons such as **Approve** or **Mark Sold** appear above the details.

GETTING STARTED

Lists, search, filters and export

Almost every area works the same way: a list of records you can search, narrow down and open.

ON THE WEBSITE

1. Type in the **Search** box and press Enter to find a record by name, number or title.
2. Choose values in the drop-downs (for example **Category**) and click **Filter**.
3. Click a **status chip** such as Pending or Paid to see only those.
4. Click **Clear** to reset.
5. Click **Export** to download everything shown as a CSV file you can open in Excel.
6. Use the ⋮ menu at the end of a row for **View details**, **Edit** and **Delete**.

IN THE ANDROID APP

1. Type in the **Search…** bar at the top.
2. Tap the **filter** icon, pick values and apply. A dot on the icon shows a filter is active.
3. Tap a **status chip** (with its count) to see only those records.
4. Scroll down to load more. If the connection drops you see **Tap to retry**.
5. Pull down to refresh.
6. Tap a card to open it and use the pencil or bin icons.

Why can I not see some records?

Some areas show residents only their own records (for example bills for their flat, their own complaints and visitors). Admins and accountants see everything their role allows.

GETTING STARTED

Adding, editing and deleting

Creating and changing records uses the same form everywhere. Fields marked with * are required.

ON THE WEBSITE

1. Click **+ Add …** in the page header. A panel slides in from the right.
2. Fill in the fields. A **green tick** means the value is fine; a **red message** explains what to fix.
3. Press **Create …**. A message confirms and the new record appears in the list.
4. To change something open ⋮ → **Edit**, make the change and press **Save changes**.
5. To remove: ⋮ → **Delete** and confirm.

IN THE ANDROID APP

1. Tap **+ Add …** at the bottom right.
2. Fill in the fields. Red text below a field tells you what is wrong, and the form scrolls to the first mistake.
3. Tap **Create …**.
4. To change something open the record and tap the **pencil**; tap **Save changes**.
5. To remove: open the record, tap the **bin** and confirm.

Adding photos

Marketplace, Events, Helpdesk, Amenities and Lost & Found accept **several photos** (up to 8, each up to 5 MB, in JPG, PNG, GIF or WebP). The first photo becomes the cover.

ON THE WEBSITE

1. In the form find **Photos** and click **Choose files**.
2. Select several pictures at once (hold Ctrl or Shift).
3. When editing, tick the small **remove** box under a current photo to delete it.
4. Save.

IN THE ANDROID APP

1. Tap **Add photos** in the form and choose pictures. Choose again to add more.
2. Tap the ✕ on a thumbnail to remove it. The first picture carries a **Cover** tag.
3. Tap **Create** or **Save changes**. Photos upload one at a time and the button shows **Uploading photo 2 of 4…**.

Pictures over 5 MB

The app skips a picture bigger than 5 MB and tells you. Reduce its size or take a smaller photo, then add it again.

GETTING STARTED

Notifications

Socivio tells you when something needs your attention, in two ways: the **bell** inside the website or app, and a **push notification** on your phone. Both are sent at the same moment.

YOU RECEIVE…	WHEN
New notice	The admin publishes a notice.
New event · event updated · event cancelled	The admin creates or changes an event.
New in Marketplace	A neighbour posts a listing.
New bill · payment reminder	A bill is created for your flat or the admin sends reminders.
Payment received · payment not verified	The admin approves or rejects the payment you reported.
Visitor at the gate · visitor has entered	Security logs a visitor for your flat.
Parcel received at the gate	A parcel for your flat is logged.
Complaint updated	The status of your complaint changes.
Booking added / updated	Staff create or change an amenity booking for you.
Vehicle added or updated · parking slot assigned or released	Staff change your vehicle or your flat's parking.
Family member, helper, flat or record updated	Staff add, change or remove a record about you or your flat. You are never notified of your own actions.
SOS (admins and guards)	A resident raises an alert.

ON THE WEBSITE

1. Click the **bell** in the top bar to see the latest notifications.
2. Click a notification to open the related screen.
3. Click **Mark all read** to clear the count.

IN THE ANDROID APP

1. Tap the **bell** to open Notifications. Tap one to open the related screen.
2. When a push arrives, tap it and the app opens at the right place.
3. Signing out stops pushes to that phone until you sign in again.

GETTING STARTED

Your profile and password

ON THE WEBSITE

1. Click your name in the top bar and choose **My profile**.
2. Change **Full name**, **Phone**, **Occupation** or upload a **Profile photo**, then save.
3. To change your password enter the **Current password**, the **New password** and **Confirm password**, then save.

IN THE ANDROID APP

1. Open **Menu** and tap your name card at the top.
2. Edit **Full name**, **Phone** and **Occupation** and tap **Save profile**.
3. Under password enter **Current password**, **New password**, **Confirm new password** and tap **Update password**.

Choose a strong password

Use at least 6 characters. The app shows a strength meter as you type. Do not share your password; staff never need it.

GETTING STARTED

Roles and permissions

Who can see and do what in every area.

Socivio has four everyday roles. What you see in the menu depends on your role.

ROLE	TYPICAL PERSON	IN SHORT
Society Admin	Secretary, manager	Runs the society: people, notices, services and finance.
Accountant	Treasurer, accounts clerk	Bills, payments, expenses, vendors and reports.
Security	Gate guard	Visitors, parcels, SOS and the gate lists.
Resident	Owner or tenant	Their own bills, visitors, complaints, bookings and listings, plus the community areas.

How to read the table
Full = add, edit and delete · **Add/Edit** = partial rights · **View** = read only · **Own** = only that person's records (or their flat's) · **—** = not available.

Access by area

AREA	ADMIN	ACCOUNTANT	SECURITY	RESIDENT
Residents	Full	View	View	View
Flats / Units	Full	View	View	View
Blocks / Wings	Full	View	View	View
Team & Roles	Full	—	—	—
Family Members	Full	—	View	Own · Full
Vehicles	Full	View	View	Own · Full
Parking Slots	Full	View	View	View
Domestic Help	Full	—	Edit	Own · Full

AREA	ADMIN	ACCOUNTANT	SECURITY	RESIDENT
Committee	Full	View	View	View
Move In / Out	Full	—	View	Own · Add/Edit
Notice Board	Full	View	View	View
Events	Full	View	View	View
Meetings & Minutes	Full	View	View	View
Documents	Full	Add/Edit	View	View
Photo Gallery	Full	View	View	View
Society Rules	Full	View	View	View

AREA	ADMIN	ACCOUNTANT	SECURITY	RESIDENT
Marketplace	Full	View	View	Own · Full
Lost & Found	Full	Own · Add/Edit	Add/Edit	Own · Add/Edit
Visitors	Full	View	Add/Edit	Own · Add/Edit
Parcels & Deliveries	Full	View	Add/Edit	Own · View
Helpdesk	Full	View	View	Own · Add/Edit
Amenities	Full	View	View	View
Amenity Bookings	Full	View	View	Own · Add/Edit
SOS Alerts	Full	—	Add/Edit	Own · Add

AREA	ADMIN	ACCOUNTANT	SECURITY	RESIDENT
Emergency Contacts	Full	View	View	View
Maintenance Bills	Full	Full	—	Own · View
Payments & Receipts	View/Delete	View	—	Own · View
Expenses	Full	Full	—	—
Vendors & Services	Full	Add/Edit	View	View
AMC & Contracts	Full	View	—	—
Society Staff	Full	View	View	—
Staff Attendance	Full	View	Add/Edit	—

AREA	ADMIN	ACCOUNTANT	SECURITY	RESIDENT
Assets & Inventory	Full	Add/Edit	—	—
Activity Logs	View	—	—	—

02

PART 2

People & Property

Residents, flats, blocks, family, vehicles, parking, domestic help, the committee and move-in / move-out.

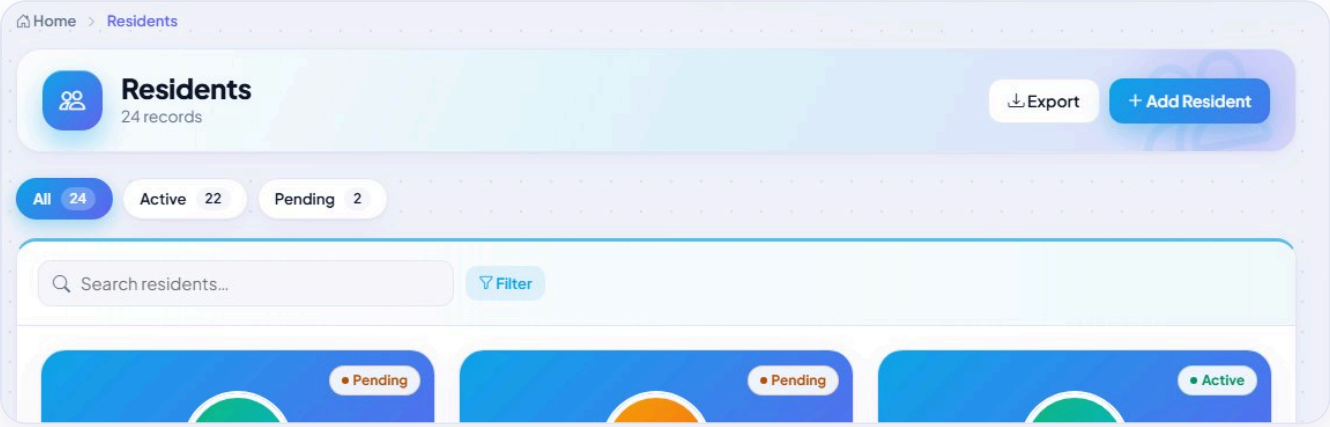
- Residents
- Flats / Units
- Blocks / Wings
- Team & Roles
- Family Members
- Vehicles
- Parking Slots
- Domestic Help
- Committee
- Move In / Out

PEOPLE & PROPERTY

Residents

A living, searchable register of every owner and tenant.

Website People & Property › Residents App Menu › Residents



The Residents screen on the website.

What it is for

Keep a complete, always-current record of everyone who lives in your society. New residents can register themselves and the admin approves them in one click, so the directory stays accurate without paperwork.

Self-registration with approval
Residents sign up from the website, pick their flat and wait for admin approval.

Owner / tenant tagging
Clearly distinguish owners and tenants for billing, voting and notices.

Profile cards with photos
Beautiful member cards with flat, phone, occupation and status.

Smart search & filters
Find anyone by name, phone, email, status or type in seconds.

Privacy aware
Residents see neighbours' names and flats; contact details stay with admins and guards.

CSV export
Download the directory for audits, AGMs or insurance.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Add, approve, edit and deactivate residents; export the full register.
Accountant	view View residents linked to each flat while raising bills.
Security	view Look up a resident's flat and phone at the gate.
Resident	view Browse the neighbour directory and keep your own profile updated.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Full Name	Text	**Yes**	As the person is known in the society. Shown on cards, bills and visitor alerts.
Flat	Choose one	No	The flat the person lives in. Bills, parcels and visitors for that flat reach them.
Type	Choose one	No	Owner or Tenant, so notices and billing can tell them apart. Choose one: Owner, Tenant
Email	Email	**Yes**	Used to sign in. Must be unique: two people cannot share an address.
Phone	Phone	No	A phone number.
Gender	Choose one	No	Choose one: Male, Female, Other
Occupation	Text	No	Type the text.
Move-in Date	Date	No	Pick a date.

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Password	Password	No	Only when you add someone yourself. Leave empty when editing to keep the old password.
Photo	Photo	No	Optional profile picture (JPG, PNG, GIF or WebP, up to 5 MB).
Status	Choose one	No	Pending = waiting for approval, Active = can sign in, Inactive = blocked. Choose one: Active, Pending, Inactive

Add a resident — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Residents**.
2. Click **+ Add Resident** at the top right. A panel slides in.
3. Fill the required fields (Full Name, Email).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Resident**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Residents** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Resident** at the bottom right.
3. Fill the required fields (Full Name, Email).
4. Red text under a box tells you what to correct.
5. Tap **Create Resident**.

Who can add residents?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Approve a resident who registered themselves Admin

ON THE WEBSITE

1. Open **People & Property → Residents**.
2. Click the **Pending** chip above the list to see only people waiting.
3. On the person's card press **Approve**.
4. The status turns **Active** and the resident receives a "Your account is approved" notification.

IN THE ANDROID APP

1. Tap **Menu → Residents**.
2. Tap the **Pending** chip under the search bar.
3. Open the resident and tap the **Approve** button.
4. A confirmation appears and the resident can now sign in.

Add a resident yourself Admin

ON THE WEBSITE

1. Click **+ Add Resident**.
2. Enter name, email, choose the flat, set the status to **Active** and type a starting password.
3. Click **Create Resident** and share the email and password with the person.

IN THE ANDROID APP

1. Tap **Add Resident**.
2. Fill the same fields, set Status to Active.
3. Tap **Create Resident**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Approve	Society Admin	When the status is pending

Who is notified

A resident gets **"Your account is approved"** the moment you approve them.

Common questions

QUESTION	ANSWER
A resident says they cannot sign in.	Open their card: if the status is Pending, approve them. If Inactive, set it to Active.
Can two people share one email?	No. Each login needs its own email address.

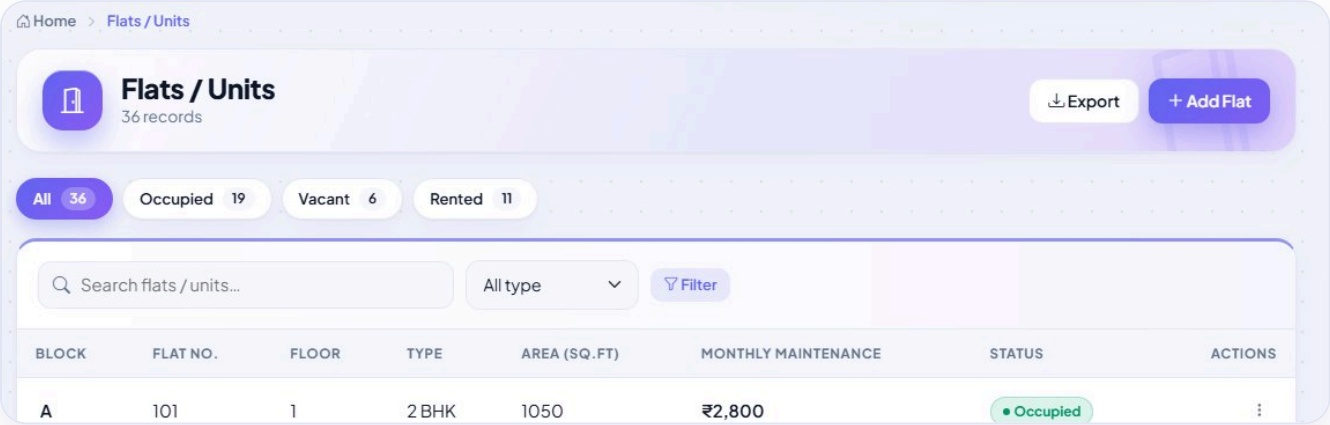
✓ No more paper registers ✓ Verified residents only ✓ Instant data for audits

PEOPLE & PROPERTY

Flats / Units

Model your whole property — towers, floors, units and maintenance rates.

Website People & Property › Flats / Units **App** Menu › Flats / Units



The Flats / Units screen on the website.

What it is for

Define blocks or wings and every flat inside them, with type, floor, area and monthly maintenance. Flats become the backbone for billing, visitors, parcels, parking and resident records.

Blocks / wings
Create towers or wings with floor counts and descriptions.

Flat register
Flat number, floor, BHK type, area in sq.ft and occupancy status.

Per-flat maintenance rate
Set the monthly charge once; bills use it automatically.

Occupancy tracking
Occupied, rented or vacant at a glance with status filters.

Duplicate protection
The system blocks two flats with the same label.

Safe deletion
Flats with residents cannot be deleted by mistake.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Create and maintain blocks and flats, set maintenance amounts.
Accountant	view Reference flat rates and area when billing.
Security	view Select the right flat when logging visitors and parcels.
Resident	view View their own flat details.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Block	Choose one	**Yes**	Choose the wing/block first. Create blocks under Blocks / Wings.
Flat No.	Text	**Yes**	The number on the door, e.g. 101. The system builds the label "A-101" from block + number.
Floor	Number	No	Enter a number.
Type	Choose one	No	Choose one: 1 BHK, 2 BHK, 3 BHK, 4 BHK, Penthouse, Studio
Area (sq.ft)	Number	No	Optional. Shown on invoices.
Monthly Maintenance	Amount (₹)	No	The amount used when you generate bills "by each flat's maintenance".
Status	Choose one	No	Occupied and Rented flats are billed; Vacant flats are skipped when generating bills. Choose one: Occupied, Vacant, Rented

Add a flat — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Flats / Units**.
2. Click **+ Add Flat** at the top right. A panel slides in.
3. Fill the required fields (Block, Flat No.).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Flat**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Flats / Units** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Flat** at the bottom right.
3. Fill the required fields (Block, Flat No.).
4. Red text under a box tells you what to correct.
5. Tap **Create Flat**.

Who can add flats / units?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Set up all flats quickly Admin

ON THE WEBSITE

1. First create your blocks (see **Blocks / Wings**).
2. Click **+ Add Flat**, pick the block, type the flat number, type and monthly maintenance.
3. Repeat for every flat. Use **Export** any time to keep a copy.

IN THE ANDROID APP

1. Menu → Flats → **Add Flat**.
2. Pick block, enter number and maintenance, tap **Create Flat**.

Who is notified

When staff change a flat that residents live in, they receive a "Flat updated" notification.

Common questions

QUESTION	ANSWER
Why did a flat not get a bill?	Bill generation skips flats that are Vacant or have a monthly maintenance of 0.

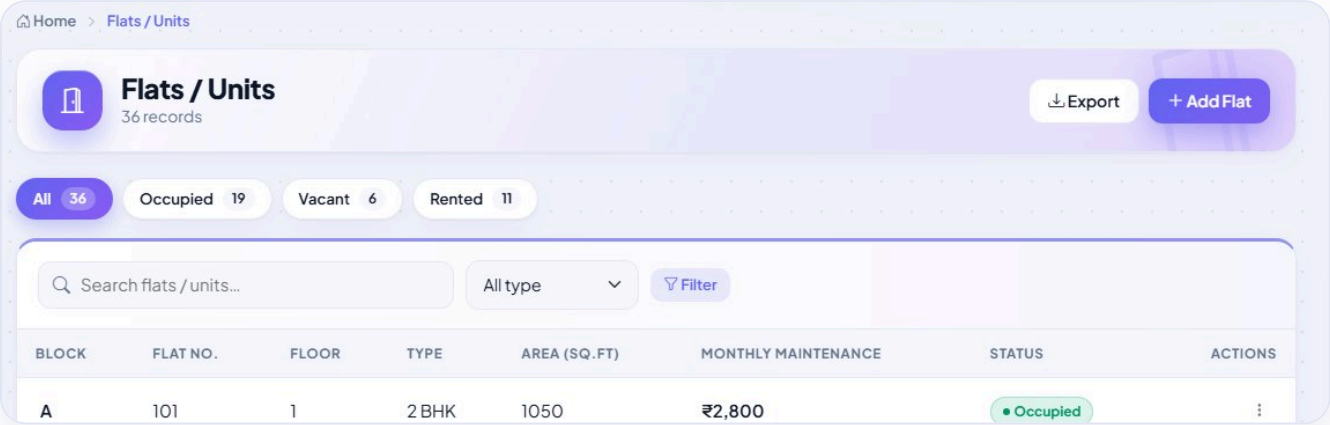
One source of truth · Accurate billing basis · Faster gate entries

PEOPLE & PROPERTY

Blocks / Wings

Blocks (also called wings or towers) group your flats.

Website People & Property › Blocks / Wings **App** Menu › Blocks / Wings



The Blocks / Wings screen on the website.

What it is for

Blocks (also called wings or towers) group your flats. Create them first, then add flats inside them.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete
Accountant	view
Security	view
Resident	view

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Block Name	Text	**Yes**	A short name such as A, B or Tower 1. It becomes the first part of each flat label.
Total Floors	Number	No	Optional. For your own reference.
Description	Text	No	Type the text.

Add a block — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Blocks / Wings**.
2. Click **+ Add Block** at the top right. A panel slides in.
3. Fill the required fields (Block Name).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Block**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Blocks / Wings** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Block** at the bottom right.
3. Fill the required fields (Block Name).
4. Red text under a box tells you what to correct.
5. Tap **Create Block**.

> **Who can add blocks / wings?**
> Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Common questions

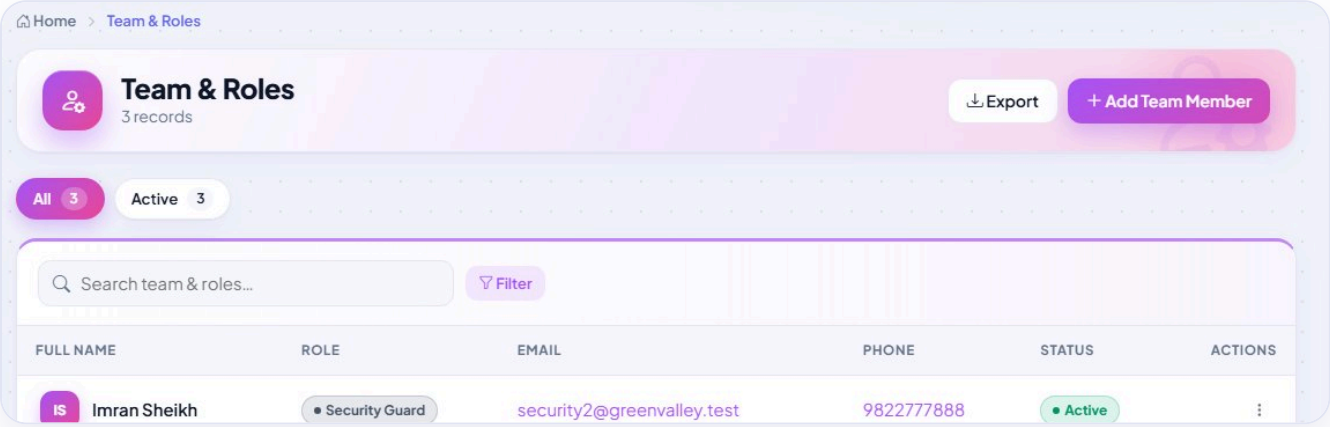
QUESTION	ANSWER
Can I rename a block later?	Yes, edit it. Existing flat labels are rebuilt from the new name the next time each flat is saved.

PEOPLE & PROPERTY

Team & Roles

Give accountants and guards their own secure logins.

Website People & Property › Team & Roles App Menu › Team & Roles



The Team & Roles screen on the website.

What it is for

Create dedicated accounts for your accountant and security staff. Each role sees only the tools it needs, so sensitive finance data stays private and guards get a fast, focused gate screen.

Role-based access
Accountant and Security roles with tailored menus and permissions.

Instant activation
Create a login in seconds and deactivate it the moment someone leaves.

Password management
Admins can reset credentials; users change their own passwords.

Profile photos
Staff accounts carry photos for accountability.

Activity trail
Every sign-in and action is logged against the user.

Society isolation
Team members only ever see their own society's data.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Add, edit or disable team logins and assign the right role.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Full Name	Text	**Yes**	Type the text.
Role	Choose one	**Yes**	Accountant (finance screens) or Security (gate screens). Admins are created by the platform. Choose one: Accountant, Security Guard
Email	Email	**Yes**	A valid email address.
Phone	Phone	No	A phone number.
Password	Password	No	Required for a new team member. Ask them to change it after the first sign-in.
Photo	Photo	No	Choose a picture (up to 5 MB).
Status	Choose one	No	Choose one: Active, Inactive

Add a team member — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Team & Roles**.
2. Click **+ Add Team Member** at the top right. A panel slides in.
3. Fill the required fields (Full Name, Role, Email).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Team Member**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Team & Roles** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Team Member** at the bottom right.
3. Fill the required fields (Full Name, Role, Email).
4. Red text under a box tells you what to correct.
5. Tap **Create Team Member**.

Who can add team & roles?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Give a new accountant or guard a login Admin

ON THE WEBSITE

1. Open **People & Property** → **Team & Roles** and click **+ Add Team Member**.
2. Enter name, choose the **Role**, enter email and a password.
3. Click **Create**. They can sign in immediately.

IN THE ANDROID APP

1. Menu → Team & Roles → **Add**.
2. Fill name, role, email, password and tap **Create**.

Common questions

QUESTION	ANSWER
A guard left the society.	Edit the team member and set the status to Inactive. They can no longer sign in.

Least-privilege security · Clear accountability · Quick onboarding

PEOPLE & PROPERTY

Family Members

Record everyone who lives in each home.

Website People & Property › Family Members

App Menu › Family Members



The Family Members screen on the website.

What it is for

Residents list their spouse, children and parents with relation, age and phone. Guards and admins get a clear picture of who belongs in each flat — useful for safety, events and emergency response.

Relation & age
Spouse, children, parents and others with age and contact.

Resident-managed
Residents add and edit their own household anytime.

Admin overview
Admins can review and correct household details.

Emergency ready
Helps the committee reach the right person fast.

Guard visibility
Security can verify household members at the gate.

Simple forms
Add a member in under 15 seconds.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete See and manage household data for any flat.
Security	view Verify who lives in a flat.
Resident	view, add, edit, delete — their own records only Add, edit and remove their own family members.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Resident	Choose one	**Yes**	Which resident this person belongs to. Residents only see themselves here. Residents do not fill this in: it is set for them, or by staff.
Name	Text	**Yes**	Type the text.
Relation	Choose one	No	Spouse, son, daughter, parent, sibling or other. Choose one: Spouse, Son, Daughter, Father, Mother, Sibling, Other
Age	Number	No	Enter a number.
Phone	Phone	No	A phone number.

Add a family member — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Family Members**.
2. Click **+ Add Family Member** at the top right. A panel slides in.
3. Fill the required fields (Resident, Name).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Family Member**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Family Members** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Family Member** at the bottom right.
3. Fill the required fields (Resident, Name).
4. Red text under a box tells you what to correct.
5. Tap **Create Family Member**.

Who can add family members?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Add your family members Resident

ON THE WEBSITE

1. Open **People & Property → Family Members**.
2. Click **+ Add Family Member**, type the name, choose the relation, add age and phone.
3. Click **Create Family Member**.

IN THE ANDROID APP

1. Menu → Family Members → **Add Family Member**.
2. Fill the details and tap **Create Family Member**.

Who is notified
If the admin adds or edits a family member for you, you receive a notification.

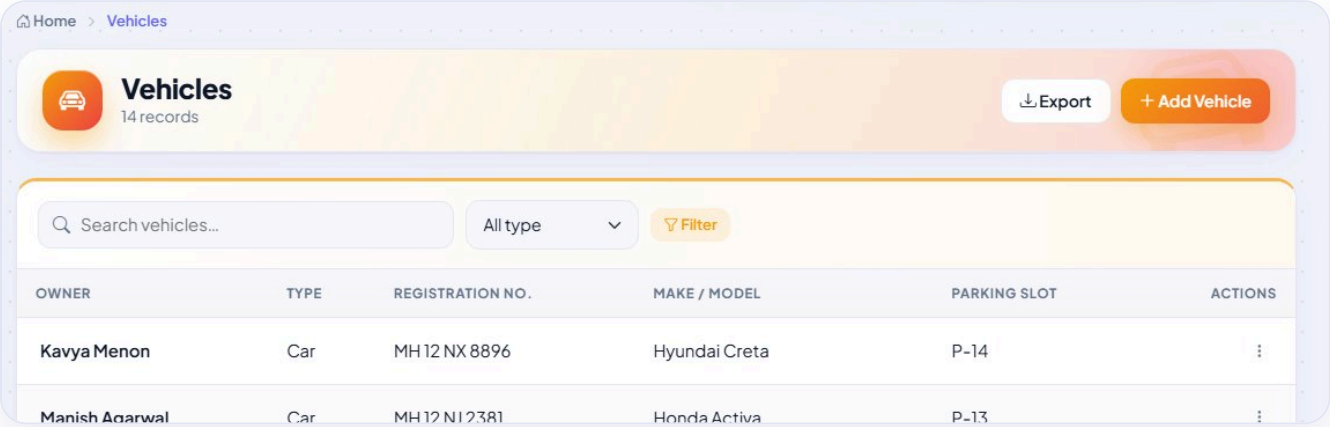
Safer society · Better event planning · Complete records

PEOPLE & PROPERTY

Vehicles

Register every vehicle and manage parking slots without arguments.

Website People & Property › Vehicles **App** Menu › Vehicles



The Vehicles screen on the website.

What it is for

Maintain a register of cars and bikes with registration number, make and sticker, and link each to a parking slot. Visual slot management shows which bays are free, occupied or blocked.

Vehicle register
Registration number, make/model, colour and sticker number.

Parking slot allotment
Allot slots to flats and see status — available, occupied, blocked.

Slot types
Car, bike and visitor parking with levels or zones.

Resident self-service
Residents add their own vehicles for admin approval.

Guard lookup
Security can verify any vehicle number at the gate.

Conflict-free
One slot, one flat — no double allotment.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Create slots, allot them and manage the full vehicle list.
Accountant	view View vehicles for parking charges.
Security	view Check a vehicle and its owner instantly.
Resident	view, add, edit, delete — their own records only Register and update their vehicles.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Owner	Choose one	**Yes**	The resident who owns the vehicle (residents are set automatically). Residents do not fill this in: it is set for them, or by staff.
Type	Choose one	No	Choose one: Car, Bike, Scooter, Cycle
Registration No.	Text	**Yes**	The number plate, e.g. GJ01AB1234.
Make / Model	Text	No	Type the text.
Colour	Text	No	Type the text.
Parking Slot	Choose one	No	Assigned by the admin. Residents cannot pick this. Residents do not fill this in: it is set for them, or by staff.
Sticker No.	Text	No	Gate sticker number, set by the admin. Residents do not fill this in: it is set for them, or by staff.

Add a vehicle — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Vehicles**.
2. Click **+ Add Vehicle** at the top right. A panel slides in.
3. Fill the required fields (Owner, Registration No.).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Vehicle**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Vehicles** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Vehicle** at the bottom right.
3. Fill the required fields (Owner, Registration No.).
4. Red text under a box tells you what to correct.
5. Tap **Create Vehicle**.

Who can add vehicles?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Register a vehicle Resident

ON THE WEBSITE

1. Open **People & Property** → **Vehicles** and click **+ Add Vehicle**.
2. Choose the type, enter the registration number, make/model and colour.
3. Click **Create Vehicle**. The admin can now give it a slot and a sticker.

IN THE ANDROID APP

1. Menu → Vehicles → **Add Vehicle**.
2. Fill type, number, make/model, colour.
3. Tap **Create Vehicle**.

Assign a parking slot to a vehicle Admin

ON THE WEBSITE

1. Open the vehicle, click **Edit**.
2. Choose a **Parking Slot** and optionally a **Sticker No.**
3. Click **Save changes**. The owner is notified.

IN THE ANDROID APP

1. Open the vehicle, tap the pencil icon.
2. Choose the parking slot, tap **Save changes**.

Who is notified

The owner is notified **"Vehicle added/updated"**, **"Parking slot … assigned to …"** or **"released"** when staff make a change.

If a vehicle moves to another owner, the previous owner is told it was removed.

Common questions

QUESTION	ANSWER
Can security see my vehicle?	Yes, guards have read-only access so they can check stickers and registration numbers at the gate.

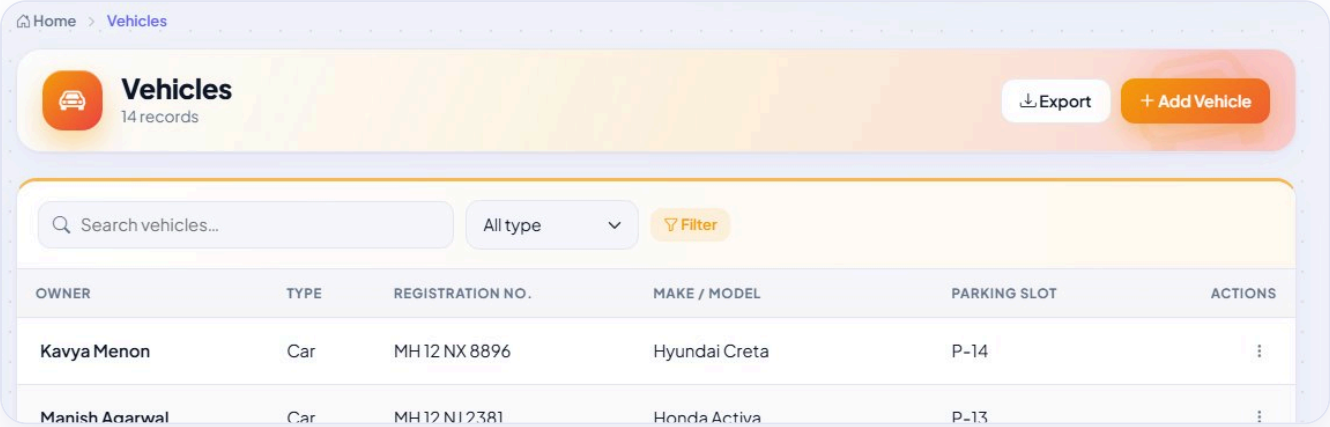
No parking disputes · Unauthorised vehicles spotted · Clear slot availability

PEOPLE & PROPERTY

Parking Slots

Keep a list of every parking slot, who it is allotted to and whether it is free.

Website People & Property › Parking Slots **App** Menu › Parking Slots



The Parking Slots screen on the website.

What it is for

Keep a list of every parking slot, who it is allotted to and whether it is free. Residents can view the list; only the admin changes it.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete
Accountant	view
Security	view
Resident	view

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Slot Code	Text	**Yes**	The marking on the ground, e.g. P-12.
Type	Choose one	No	Car, bike or visitor. Choose one: Car, Bike, Visitor
Level / Zone	Text	No	Basement, stilt, open area, etc.
Allotted Flat	Choose one	No	Giving a slot to a flat notifies everyone in that flat.
Status	Choose one	No	Available, Occupied or Blocked. Choose one: Available, Occupied, Blocked

Add a slot — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Parking Slots**.
2. Click **+ Add Slot** at the top right. A panel slides in.
3. Fill the required fields (Slot Code).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Slot**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Parking Slots** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Slot** at the bottom right.
3. Fill the required fields (Slot Code).
4. Red text under a box tells you what to correct.
5. Tap **Create Slot**.

Who can add parking slots?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Allot a slot to a flat Admin

ON THE WEBSITE

1. Open **People & Property** → **Parking Slots**.
2. Click the ⋮ menu on the slot and choose **Edit**.
3. Select the **Allotted Flat** and set Status to **Occupied**.
4. Click **Save changes**.

IN THE ANDROID APP

1. Menu → Parking Slots → open the slot → pencil icon.
2. Choose the flat, set Status, tap **Save changes**.

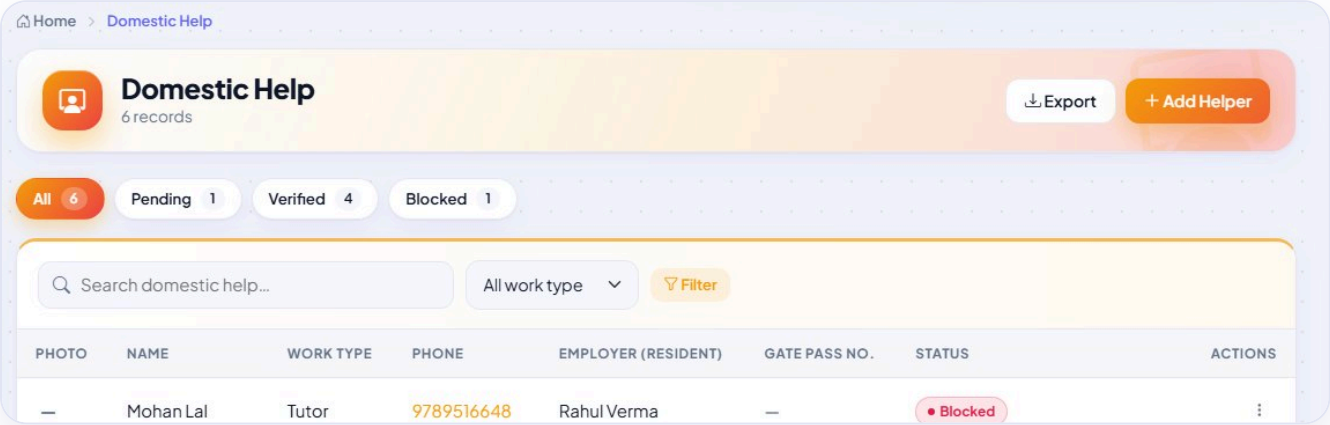
Who is notified
"Parking slot P-12 allotted to your flat" goes to everyone in the flat. When the slot is cleared or moved, the old flat gets **"Parking slot … released"**.

PEOPLE & PROPERTY

Domestic Help

Verified maids, cooks and drivers — with gate passes.

Website People & Property › Domestic Help App Menu › Domestic Help



The Domestic Help screen on the website.

What it is for

Residents register their domestic staff, and guards or admins verify them. Verified helpers receive a gate pass number so entry is quick and secure, while blocked helpers are flagged immediately.

Helper profiles
Name, phone, work type, photo and ID proof reference.

Verification workflow
Pending → Verified → Blocked with one-tap actions.

Gate pass numbers
Issue a pass for trusted helpers.

Employer link
See which resident each helper works for.

Blocklist
Prevent unwanted entry with a single click.

Work types
Maid, cook, driver, nanny, gardener, tutor and more.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Verify, block and review all helpers.
Security	view, edit Verify helpers and check passes at the gate.
Resident	view, add, edit, delete — their own records only Register and manage their own helpers.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Photo	Photo	No	Choose a picture (up to 5 MB).
Name	Text	**Yes**	Type the text.
Work Type	Choose one	No	Choose one: Maid, Cook, Driver, Nanny, Gardener, Tutor, Other
Phone	Phone	No	A phone number.
ID Proof No.	Text	No	Aadhaar or other ID number, kept for the security record.
Employer (Resident)	Choose one	No	The resident who employs the helper (set automatically for residents). Residents do not fill this in: it is set for them, or by staff.
Gate Pass No.	Text	No	Issued by the admin or security after verification. Residents do not fill this in: it is set for them, or by staff.
Status	Choose one	No	Pending until verified. Blocked helpers are refused at the gate. Choose one: Pending, Verified, Blocked Residents do not fill this in: it is set for them, or by staff.

Add a helper — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Domestic Help**.
2. Click **+ Add Helper** at the top right. A panel slides in.
3. Fill the required fields (Name).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Helper**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Domestic Help** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Helper** at the bottom right.
3. Fill the required fields (Name).
4. Red text under a box tells you what to correct.
5. Tap **Create Helper**.

Who can add domestic help?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Register your maid, cook or driver Resident

ON THE WEBSITE

1. Open **People & Property** → **Domestic Help**, click **+ Add Helper**.
2. Add a photo, name, work type, phone and ID number.
3. Click **Create Helper**. Status stays **Pending**.

IN THE ANDROID APP

1. Menu → Domestic Help → **Add Helper**.
2. Fill the details, tap **Create Helper**.

Verify or block a helper Admin / Security

ON THE WEBSITE

1. Open the helper row. Press **Verify** after checking ID, or **Block** to refuse entry.
2. Enter the Gate Pass No. via **Edit**.

IN THE ANDROID APP

1. Open the helper and tap **Verify** or **Block**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Verify	Society Admin, Security	When the status is pending
Block	Society Admin, Security	When the status is pending or verified

Who is notified

The employer is notified when staff verify or block their helper.

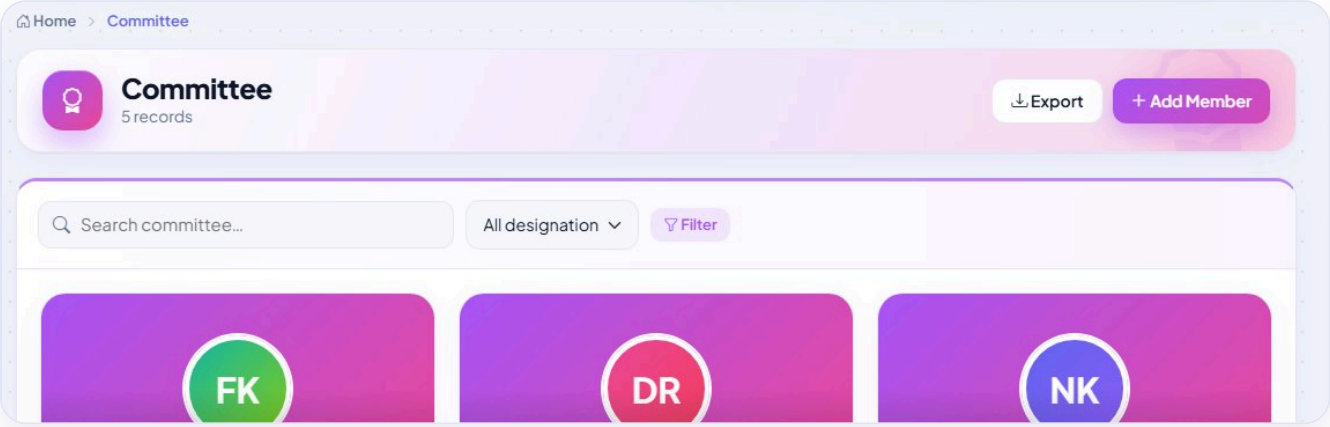
Safer entry · Faster gate checks · Full audit trail

PEOPLE & PROPERTY

Committee

Let residents know exactly who runs the society.

Website People & Property › Committee App Menu › Committee



The Committee screen on the website.

What it is for

Publish your managing committee with designations, flats and contact numbers. Term end dates help you plan elections, and residents always know whom to approach.

Designation cards
Chairman, secretary, treasurer and more as clean member cards.

Term tracking
Record when each member's term ends.

Contact details
Phone numbers and flats for quick reach.

Always visible
Shown on every resident's dashboard.

Easy updates
Update after an election in a few clicks.

Transparent governance
Builds trust across the community.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Maintain the committee list and terms.
Accountant	view
Security	view
Resident	view Find the right person for any issue.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Name	Text	**Yes**	Type the text.
Designation	Choose one	**Yes**	Chairman, Secretary, Treasurer, Vice Chairman, Joint Secretary or Member. Choose one: Chairman, Secretary, Treasurer, Vice Chairman, Joint Secretary, Member
Phone	Phone	No	A phone number.
Flat	Text	No	Type the text.
Term Ends	Date	No	When the current term finishes. Useful for election reminders.

Add a member — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Committee**.
2. Click **+ Add Member** at the top right. A panel slides in.
3. Fill the required fields (Name, Designation).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Member**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Committee** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Member** at the bottom right.
3. Fill the required fields (Name, Designation).
4. Red text under a box tells you what to correct.
5. Tap **Create Member**.

Who can add committee?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Publish the committee Admin

ON THE WEBSITE

1. Open **People & Property** → **Committee**, click **+ Add Member**.
2. Enter name, designation, phone, flat and term end date.
3. Click **Create Member**.

IN THE ANDROID APP

1. Menu → Committee → **Add Member** → fill → **Create Member**.

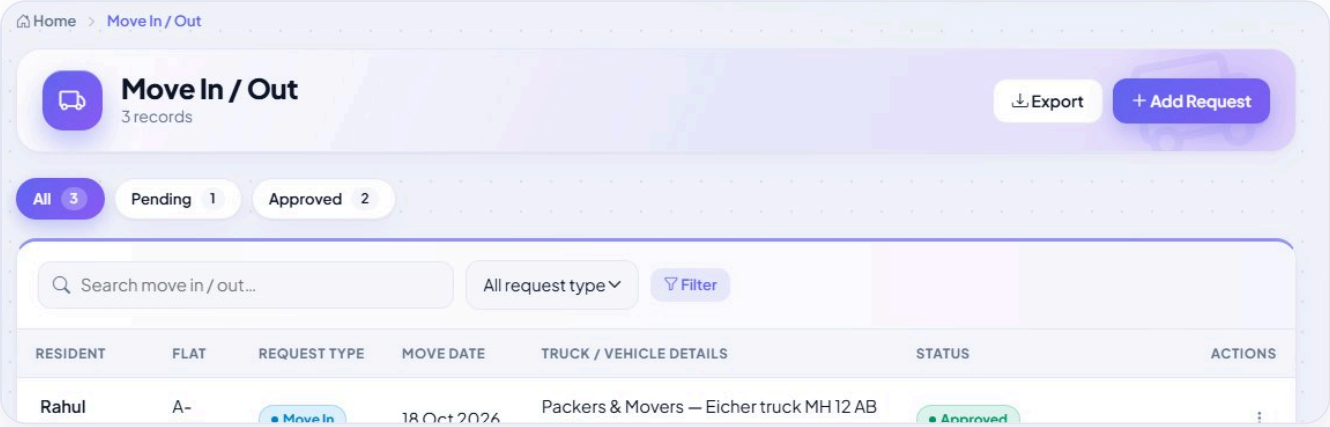
Clear accountability · Faster escalations · Election planning

PEOPLE & PROPERTY

Move In / Out

Organise shifting days without chaos at the gate.

Website People & Property › Move In / Out **App** Menu › Move In / Out



The Move In / Out screen on the website.

What it is for

Residents request a move-in or move-out date with truck details. The admin approves, and security knows exactly which vehicles to expect — protecting the society from damage and surprise traffic.

Request form
Date, vehicle details and notes in one simple form.

Approval workflow
Admin approves or rejects with a tap.

Instant notifications
Residents are told the moment a decision is made.

Gate awareness
Security sees approved moves.

History
Complete log of every move in and out.

Lift & timing notes
Capture lift booking and time window needs.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Review and approve or reject requests.
Security	view Know which moving vehicles to allow.
Resident	view, add, edit — their own records only Submit and track requests.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Resident	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Flat	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Request Type	Choose one	**Yes**	Move in or move out. Choose one: Move In, Move Out
Move Date	Date	**Yes**	The day the truck arrives. Guards see it so they can allow the vehicle.
Truck / Vehicle Details	Text	No	Registration number and agency, so the gate can verify.
Status	Choose one	No	Choose one: Pending, Approved, Rejected Residents do not fill this in: it is set for them, or by staff.
Notes	Long text	No	Write the details in your own words.

Add a request — the basics

ON THE WEBSITE

1. Open **People & Property** in the sidebar and click **Move In / Out**.
2. Click **+ Add Request** at the top right. A panel slides in.
3. Fill the required fields (Request Type, Move Date).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Request**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Move In / Out** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Request** at the bottom right.
3. Fill the required fields (Request Type, Move Date).
4. Red text under a box tells you what to correct.
5. Tap **Create Request**.

Who can add move in / out?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Request a move-in or move-out Resident

ON THE WEBSITE

1. Open **People & Property** → **Move In / Out** and click **+ Add Request**.
2. Choose the type, the move date and the truck details.
3. Click **Create Request**. Status is **Pending**.

IN THE ANDROID APP

1. Menu → Move In / Out → **Add Request**.
2. Fill it in and tap **Create Request**.

Approve or reject a request Admin

ON THE WEBSITE

1. Open the request and press **Approve** or **Reject**.

IN THE ANDROID APP

1. Open the request and tap **Approve** or **Reject**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Approve	Society Admin	When the status is pending
Reject	Society Admin	When the status is pending

Who is notified

The resident is notified when the admin approves or rejects the request.

Organised move days · Less disruption · Protected common areas

03

PART 3

Community

Keep neighbours informed and connected: notices, events, polls, meetings, documents, photos, rules, the marketplace and lost & found.

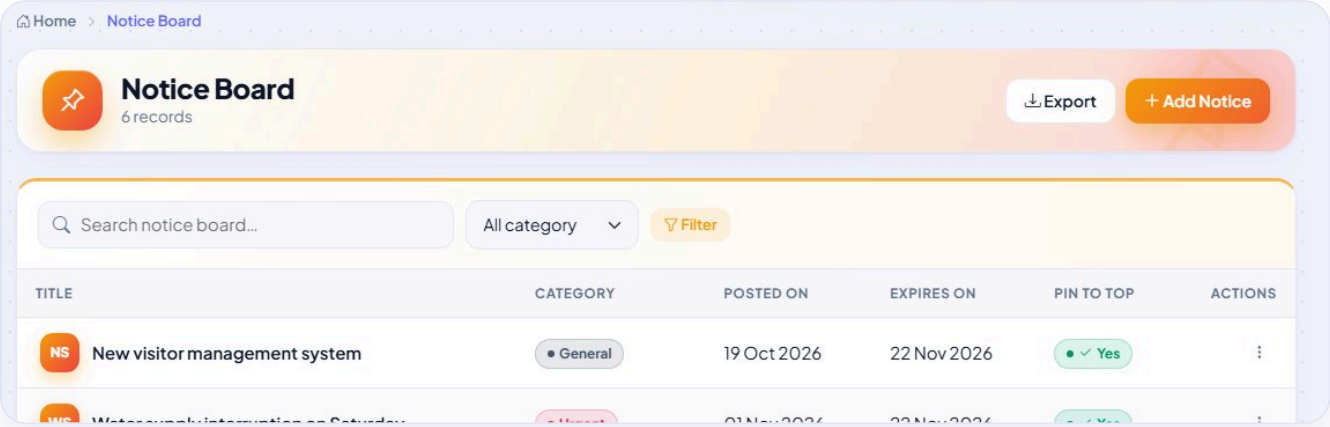
- Notice Board
- Events
- Polls and voting
- Meetings & Minutes
- Documents
- Photo Gallery
- Society Rules
- Marketplace
- Lost & Found

COMMUNITY

Notice Board

Digital announcements that actually reach every resident.

Website Community › Notice Board **App** Menu › Notice Board



The Notice Board screen on the website.

What it is for

Post notices with categories, expiry dates and attachments. Pin important ones to the top and every resident is notified instantly — no more crumpled paper on the lobby wall.

Categories
General, urgent, events, maintenance and rules with colour badges.

Pin to top
Keep critical notices visible.

Auto notifications
Every resident gets a bell alert on publish.

Attachments
Attach PDFs or images to a notice.

Expiry dates
Notices retire themselves when they expire.

Dashboard widgets
Latest notices appear on each resident's home.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Create, pin, edit and delete notices.
Accountant	view Read and stay informed.
Security	view Know about gate-related notices.
Resident	view Read notices and get instant alerts.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Title	Text	**Yes**	A short headline, e.g. "Water supply off on Sunday".
Category	Choose one	No	Urgent notices are announced as "Urgent — please read". Choose one: General, Urgent, Event, Maintenance, Rules
Posted On	Date	No	Pick a date.
Expires On	Date	No	Optional last day the notice is relevant.
Pin to top	Yes / No	No	Keeps an important notice above newer ones.
Notice Details	Long text	**Yes**	The full message.
Attachment	File	No	Optional PDF or image.

Add a notice — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Notice Board**.
2. Click **+ Add Notice** at the top right. A panel slides in.
3. Fill the required fields (Title, Notice Details).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Notice**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Notice Board** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Notice** at the bottom right.
3. Fill the required fields (Title, Notice Details).
4. Red text under a box tells you what to correct.
5. Tap **Create Notice**.

Who can add notice board?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Publish a notice to everyone Admin

ON THE WEBSITE

1. Open **Community** → **Notice Board**, click **+ Add Notice**.
2. Type the title and details, choose the category, tick **Pin to top** if needed.
3. Click **Create Notice**.

IN THE ANDROID APP

1. Dashboard → **New notice** quick action (or Menu → Notice Board → **Add Notice**).
2. Fill it in and tap **Create Notice**.

Who is notified

Every active resident and staff member (except you) receives **"New notice: …"** on the bell and as a phone push.

Common questions

QUESTION	ANSWER
Can residents reply to a notice?	No. Notices are one-way. Residents use Helpdesk for requests.

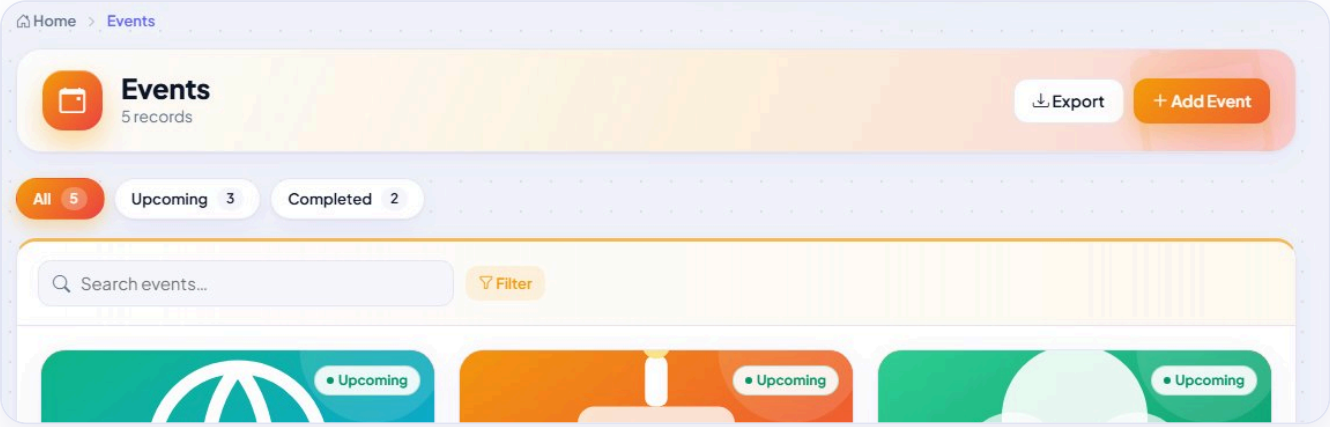
Everyone informed · Zero paper · Urgent notices never missed

COMMUNITY

Events

Plan, promote and celebrate community events.

Website Community › Events App Menu › Events



The Events screen on the website.

What it is for

Create events with banners, venue, dates and optional entry fee. Residents see upcoming celebrations on their dashboard, from Diwali get-togethers to kids' carnivals.

Banner images
Eye-catching cards with event artwork.

Venue & timing
Start/end date and place at a glance.

Entry fee
Free or paid events with the fee shown clearly.

Status tracking
Upcoming, ongoing, completed or cancelled.

Dashboard highlights
Next events shown to residents.

Event archive
Past events stay for reference.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Create and manage events.
Accountant	view See fee-based events for collections.
Security	view
Resident	view Discover events and plan their weekends.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Event Title	Text	**Yes**	e.g. "Diwali Night".
Venue	Text	No	Type the text.
Entry Fee	Amount (₹)	No	Leave empty or 0 for free entry.
Starts	Date & time	**Yes**	Date and time. The card shows a date badge from this.
Ends	Date & time	No	Pick a date and time.
Status	Choose one	No	Upcoming, Ongoing, Completed or Cancelled. Choose one: Upcoming, Ongoing, Completed, Cancelled
Photos	Photos	No	Up to 8 photos. The first one is the banner on the card.
Description	Long text	No	Write the details in your own words.

Add a event — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Events**.
2. Click **+ Add Event** at the top right. A panel slides in.
3. Fill the required fields (Event Title, Starts).
4. Under **Photos** select up to 8 pictures at once.
5. Press **Create Event**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Events** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Event** at the bottom right.
3. Fill the required fields (Event Title, Starts).
4. Tap **Add photos** and choose several pictures; ✕ removes one.
5. Tap **Create Event**.

Who can add events?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Create an event with photos Admin

ON THE WEBSITE

1. Open **Community** → **Events**, click **+ Add Event**.
2. Enter title, start/end time, venue and fee, and write a short description.
3. Under **Photos** choose up to 8 pictures. The first is the cover.
4. Click **Create Event**.

IN THE ANDROID APP

1. Menu → Events → **Add Event**.
2. Fill in the details. Tap **Add photos** and pick several at once; tap ✕ on a thumbnail to remove it.
3. Tap **Create Event**. Photos upload one by one with a progress message.

Cancel or change an event Admin

ON THE WEBSITE

1. Open the event → **Edit**.
2. Set Status to **Cancelled** or change the date / venue.
3. Click **Save changes**.

IN THE ANDROID APP

1. Open the event, tap the pencil icon, change it and tap **Save changes**.

Who is notified

All active residents get **"New event: …"** with the date and venue.

They also get **"Event updated"** when the date or venue changes and **"Event cancelled"** when you cancel.

Common questions

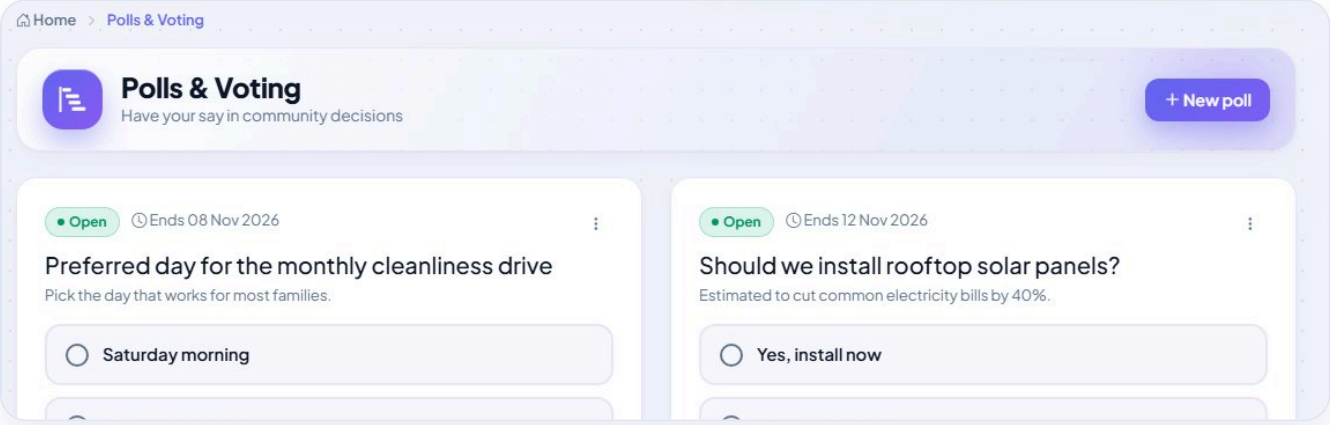
QUESTION	ANSWER
How many photos can I add?	Up to 8 per event, 5 MB each (JPG, PNG, GIF or WebP).

Stronger community · Higher participation · Organised calendar

COMMUNITY

Polls and voting

Polls let the society decide together: should we repaint the building, which date for the festival, whether to buy a new generator. Each person gets **one vote** per poll.



Results update with a bar and a percentage for every option.

Create a poll (admin)

ON THE WEBSITE

1. Open **Community** → **Polls & Voting** and click **New poll**.
2. Type the **Question** and an optional **Description**.
3. Enter the **Options**. Use **Add option** for more.
4. Set the **Closing date** and press **Publish poll**.

IN THE ANDROID APP

1. Menu → **Polls & Voting** → **New poll**.
2. Type the question, optional description and the options (tap **Add option** for more).
3. Choose the closing date and tap **Publish poll**.

Vote

ON THE WEBSITE

1. Open Polls and click the option you prefer.
2. Your choice is highlighted and the percentages update.

IN THE ANDROID APP

1. Open **Polls & Voting** and tap your option.
2. You see your vote marked and the live results.

Close or delete (admin)

Press **Close poll** to stop voting and keep the results, or **Delete** to remove the poll and all votes.

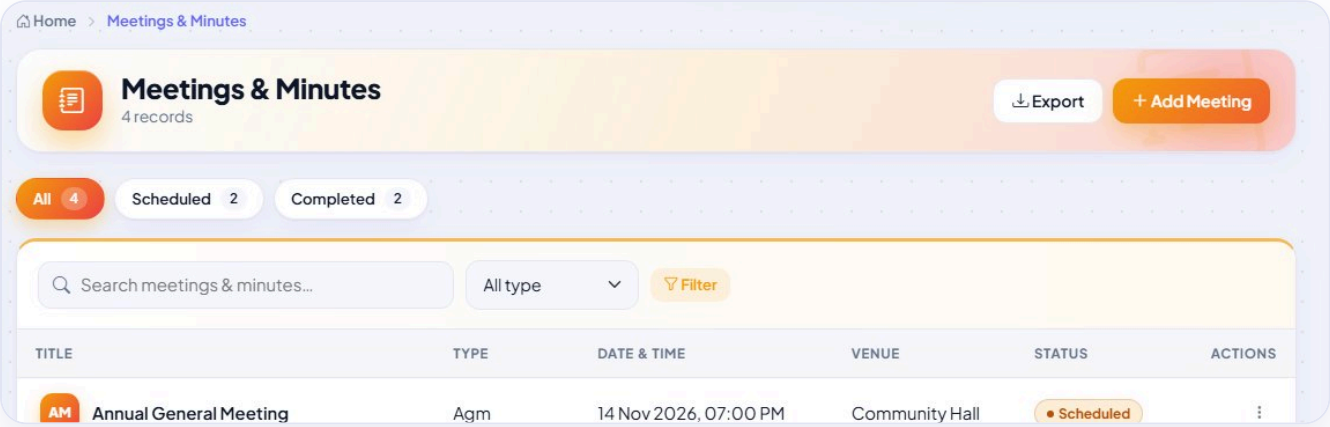
COMMUNITY

Meetings & Minutes

Schedule meetings and keep official minutes in one place.

Website Community › Meetings & Minutes

App Menu › Meetings & Minutes



The Meetings & Minutes screen on the website.

What it is for

Plan AGMs, committee and emergency meetings with agenda and venue, then record the minutes afterwards. Residents can always look back at what was decided and why.

Meeting types
AGM, committee, emergency and general meetings.

Agenda
Share the agenda before the meeting.

Minutes
Record decisions and action items afterwards.

Status
Scheduled, completed or cancelled.

Date & venue
Clear schedule visible to all residents.

Searchable history
Find any past decision quickly.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Schedule meetings and publish minutes.
Accountant	view Refer to financial decisions.
Security	view
Resident	view Read agendas and minutes anytime.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Title	Text	**Yes**	Type the text.
Type	Choose one	No	AGM, committee, emergency or general. Choose one: Agm, Committee, Emergency, General
Date & Time	Date & time	**Yes**	Pick a date and time.
Venue	Text	No	Type the text.
Status	Choose one	No	Choose one: Scheduled, Completed, Cancelled
Agenda	Long text	No	Points to be discussed. Share it before the meeting.
Minutes of Meeting	Long text	No	Fill in after the meeting. Residents can read it afterwards.

Add a meeting — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Meetings & Minutes**.
2. Click **+ Add Meeting** at the top right. A panel slides in.
3. Fill the required fields (Title, Date & Time).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Meeting**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Meetings & Minutes** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Meeting** at the bottom right.
3. Fill the required fields (Title, Date & Time).
4. Red text under a box tells you what to correct.
5. Tap **Create Meeting**.

Who can add meetings & minutes?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Schedule a meeting and publish minutes Admin

ON THE WEBSITE

1. Open **Community → Meetings & Minutes → + Add Meeting**.
2. Enter title, date & time, venue and agenda. Save.
3. After the meeting open it again, click **Edit**, write the **Minutes** and set Status to **Completed**.

IN THE ANDROID APP

1. Menu → Meetings & Minutes → **Add Meeting**.
2. Later open it, tap the pencil, add minutes, set Completed and save.

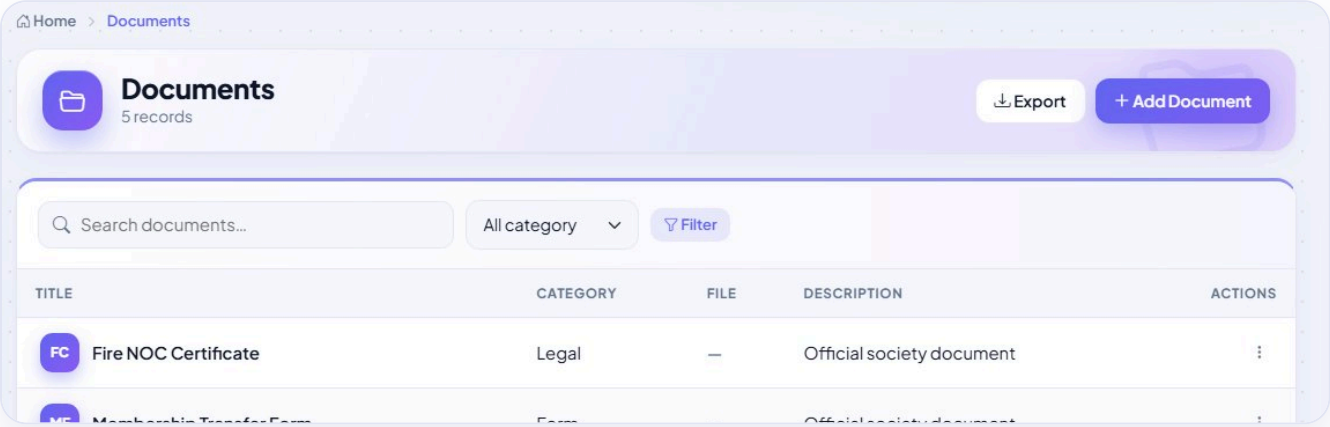
✓ Transparency ✓ Better attendance ✓ Legal record-keeping

COMMUNITY

Documents

Bylaws, audits and forms — always one click away.

Website Community › Documents App Menu › Documents



The Documents screen on the website.

What it is for

Upload and organise official society documents by category. Residents download forms and bylaws instead of asking the office, and nothing gets lost in someone's inbox.

Categories
Bylaws, minutes, audit reports, forms and legal papers.

Secure uploads
PDF, Word, Excel and images up to 5 MB.

Instant download
One-click access for residents.

Uploader tracking
See who uploaded each file.

Search
Find a document by title or description.

Always available
Accessible 24/7 on any device.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Upload, edit and delete documents.
Accountant	view, add, edit Upload audit and finance documents.
Security	view Access gate-related forms.
Resident	view Download documents anytime.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Title	Text	**Yes**	Type the text.
Category	Choose one	No	Bylaws, minutes, audit, form, legal or other. Choose one: Bylaws, Minutes, Audit, Form, Legal, Other
File	File	**Yes**	PDF, Word, Excel, CSV, text, ZIP or image, up to 5 MB.
Description	Text	No	Type the text.

Add a document — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Documents**.
2. Click **+ Add Document** at the top right. A panel slides in.
3. Fill the required fields (Title, File).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Document**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Documents** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Document** at the bottom right.
3. Fill the required fields (Title, File).
4. Red text under a box tells you what to correct.
5. Tap **Create Document**.

Who can add documents?
Society Admin, Accountant.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Upload a document Admin / Accountant

ON THE WEBSITE

1. Open **Community** → **Documents** → **+ Add Document**.
2. Enter a title, choose the category, attach the **File**.
3. Click **Create Document**.

IN THE ANDROID APP

1. Menu → Documents → **Add Document**.
2. Tap **Choose** to pick a file from your phone, then **Create Document**.

Open a document Everyone

ON THE WEBSITE

1. Click **Open** beside the document; it opens in a new tab.

IN THE ANDROID APP

1. Open the record and tap **Open attachment**.

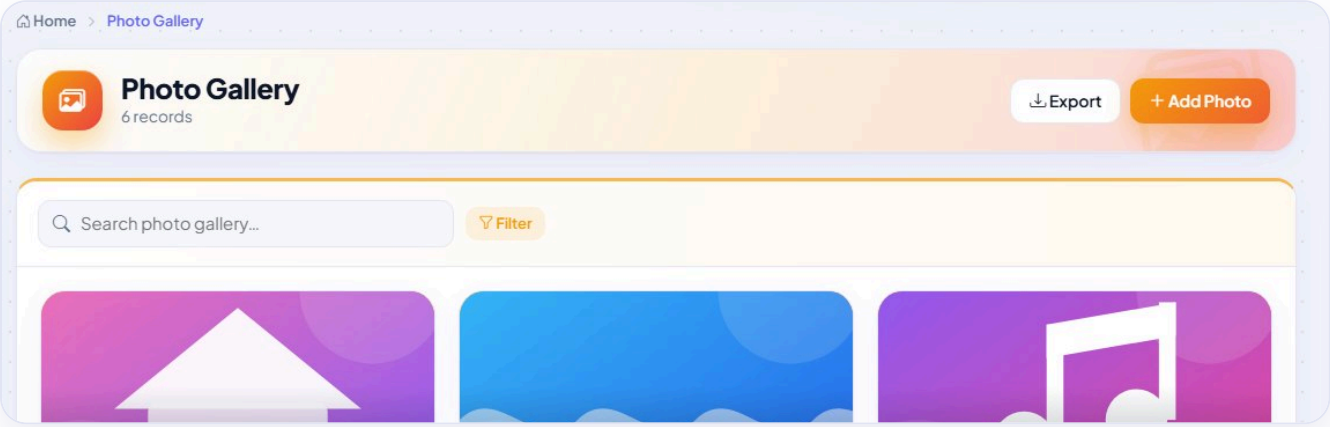
Less office running | Organised records | Audit ready

COMMUNITY

Photo Gallery

Relive festivals, events and everyday moments.

Website Community › Photo Gallery **App** Menu › Photo Gallery



The Photo Gallery screen on the website.

What it is for

Share photos in albums so every resident feels part of the story. Grid layouts and click-to-zoom make browsing a pleasure on phone or desktop.

Albums
Group photos by event or theme.

Responsive grid
Beautiful on every screen size.

Zoom preview
Tap any photo to view it large.

Captions & dates
Add context to every picture.

Easy upload
Add photos in seconds from the admin panel.

Community pride
Showcase your amenities and celebrations.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Upload and organise photos.
Accountant	view
Security	view
Resident	view Browse and enjoy the gallery.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Caption	Text	**Yes**	A short description of the photo.
Album	Text	No	Group name, e.g. "Holi 2026".
Date	Date	No	Pick a date.
Photo	Photo	**Yes**	JPG, PNG, GIF or WebP up to 5 MB. Each gallery entry is one photo.

Add a photo — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Photo Gallery**.
2. Click **+ Add Photo** at the top right. A panel slides in.
3. Fill the required fields (Caption, Photo).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Photo**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Photo Gallery** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Photo** at the bottom right.
3. Fill the required fields (Caption, Photo).
4. Red text under a box tells you what to correct.
5. Tap **Create Photo**.

Who can add photo gallery?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Add photos to an album Admin

ON THE WEBSITE

1. Open **Community** → **Photo Gallery** → **+ Add Photo**.
2. Choose the photo, enter a caption, album and date.
3. Click **Create Photo**. Repeat for more pictures.

IN THE ANDROID APP

1. Menu → Photo Gallery → **Add Photo** → pick, caption → **Create Photo**.

View a photo large Everyone

ON THE WEBSITE

1. Click any picture to open the zoomed preview.

IN THE ANDROID APP

1. Open the record to see the photo in full.

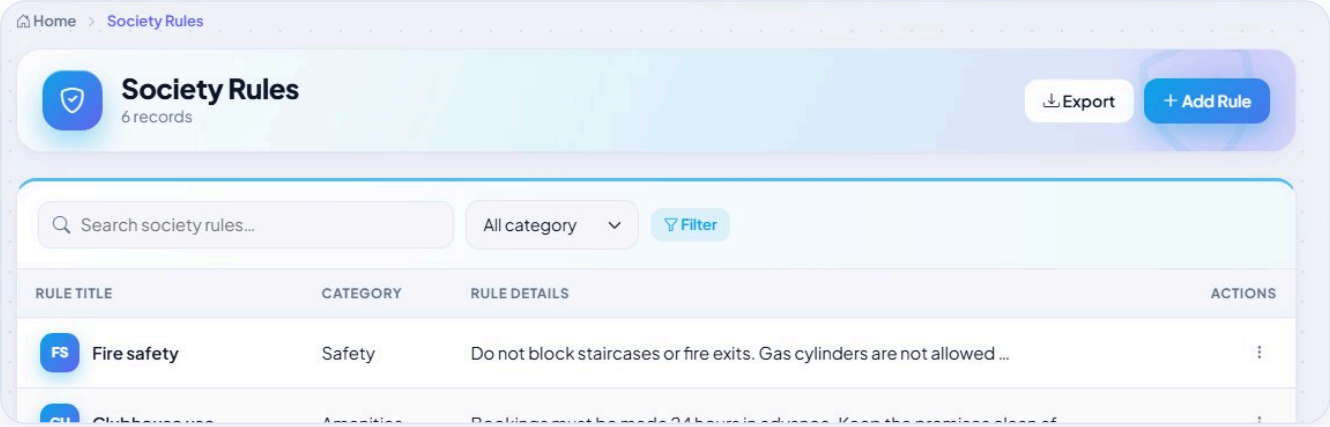
Stronger bonding · Showcases amenities · Memories preserved

COMMUNITY

Society Rules

Clear bylaws that everyone can find and follow.

Website Community › Society Rules **App** Menu › Society Rules



The Society Rules screen on the website.

What it is for

Publish rules by category — parking, noise, pets, safety and more — so expectations are clear and disputes are easier to resolve.

Categorised rules
Parking, noise, pets, cleanliness, safety, amenities.

Plain-language details
Describe each rule clearly.

Always accessible
Residents can check rules anytime.

Easy updates
Edit rules as policies change.

Linked to notices
Announce rule changes instantly.

Reduces disputes
A single reference for the committee.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Maintain the rulebook.
Accountant	view
Security	view Enforce rules with confidence.
Resident	view Read the rules anytime.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Rule Title	Text	**Yes**	e.g. "No horns after 10 pm".
Category	Choose one	No	Parking, noise, pets, safety, cleanliness, amenities or other. Choose one: Parking, Noise, Pets, Safety, Cleanliness, Amenities, Other
Rule Details	Long text	No	Write the details in your own words.

Add a rule — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Society Rules**.
2. Click **+ Add Rule** at the top right. A panel slides in.
3. Fill the required fields (Rule Title).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Rule**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Society Rules** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Rule** at the bottom right.
3. Fill the required fields (Rule Title).
4. Red text under a box tells you what to correct.
5. Tap **Create Rule**.

Who can add society rules?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Publish a rule Admin

ON THE WEBSITE

1. Open **Community → Society Rules → + Add Rule**.
2. Type the title, choose a category and describe the rule. Save.

IN THE ANDROID APP

1. Menu → Society Rules → **Add Rule** → fill → **Create Rule**.

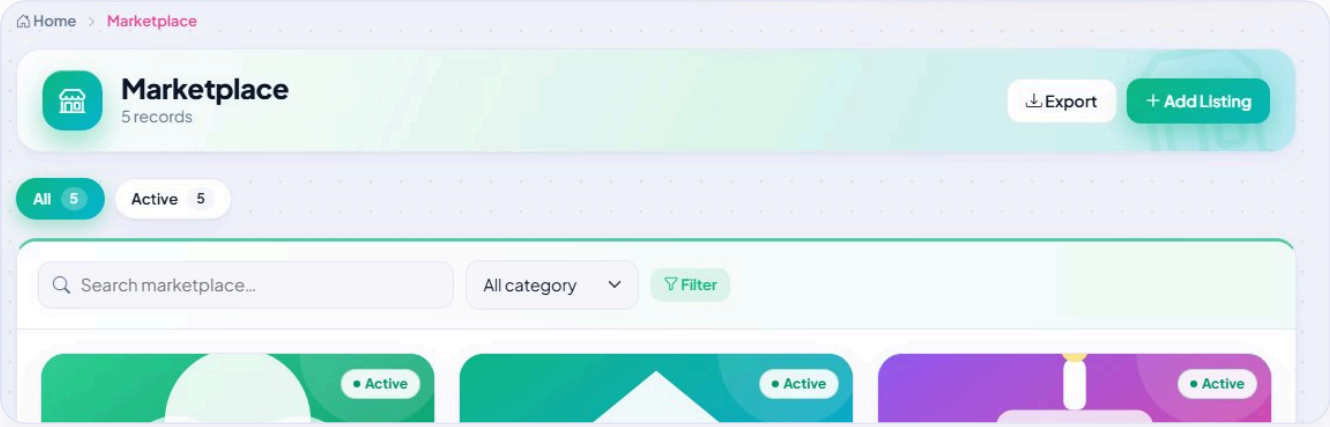
Fewer disputes · Consistent enforcement · Informed residents

COMMUNITY

Marketplace

A trusted neighbourhood classifieds board.

Website Community › Marketplace App Menu › Marketplace



The Marketplace screen on the website.

What it is for

Residents buy, sell, rent and share within the society — sofas, cycles, tuition, flats for rent. Listings show photos and prices, and sellers mark items sold when done.

Photo listings
Cards with image, price and category.

Categories
Sale, rent, service, free and wanted.

Contact details
Reach the seller directly.

Mark as sold
Keep the board fresh.

Own listings
Residents manage only their own posts.

Neighbour trust
Only verified residents can post.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Moderate any listing.
Accountant	view
Security	view
Resident	view, add, edit, delete — their own records only Post, edit and mark items sold.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Title	Text	**Yes**	What you are selling, e.g. "Study table with drawers".
Category	Choose one	No	Sale, rent, service, free or wanted. "Free" shows a green Free price. Choose one: Sale, Rent, Service, Free, Wanted
Price	Amount (₹)	No	In rupees. Leave 0 for free or wanted listings.
Contact No.	Phone	No	Shown to neighbours so they can call you.
Posted By	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Status	Choose one	No	Active until you mark it sold. Choose one: Active, Sold, Closed
Photos	Photos	No	Up to 8 photos, 5 MB each. The first is the cover shown in the grid.
Description	Long text	No	Write the details in your own words.

Add a listing — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Marketplace**.
2. Click **+ Add Listing** at the top right. A panel slides in.
3. Fill the required fields (Title).
4. Under **Photos** select up to 8 pictures at once.
5. Press **Create Listing**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Marketplace** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Listing** at the bottom right.
3. Fill the required fields (Title).
4. Tap **Add photos** and choose several pictures; ✕ removes one.
5. Tap **Create Listing**.

Who can add marketplace?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Post a listing with several photos Resident

ON THE WEBSITE

1. Open **Community** → **Marketplace** and click **+ Add Listing**.
2. Enter the title, category, price, your phone and description.
3. Under **Photos**, select up to 8 pictures at once.
4. Click **Create Listing**. Every resident is notified.

IN THE ANDROID APP

1. Open **Market** from the Quick actions (or Menu → Marketplace) and tap **Add Listing**.
2. Fill in the details, then tap **Add photos**, choose several pictures. A "Cover" tag marks the first.
3. Tap **Create Listing**. You will see "Uploading photo 2 of 4…" while pictures are sent.

Browse and contact a seller Everyone

ON THE WEBSITE

1. Open the Marketplace, click a card to see all photos in a gallery.
2. Use the seller's phone number to call or message.

IN THE ANDROID APP

1. The Marketplace shows a two-column grid with price and category on each tile.
2. Tap a tile to swipe through the photos, pinch to zoom, and tap the phone number to call.

Mark an item sold Seller

ON THE WEBSITE

1. Open your listing and press **Mark Sold**.

IN THE ANDROID APP

1. Open the listing and tap **Mark Sold**. The tile gets a SOLD stamp.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Mark Sold	Resident, Society Admin	When the status is active

Who is notified

All active residents (except the seller) receive **"New in Marketplace: …"** with category, price and who posted it.

Common questions

QUESTION	ANSWER
Can I edit photos later?	Yes. Edit the listing, remove pictures with ✕ and add new ones, up to 8 in total.
Who can see my phone number?	Everyone in your society who opens the listing.

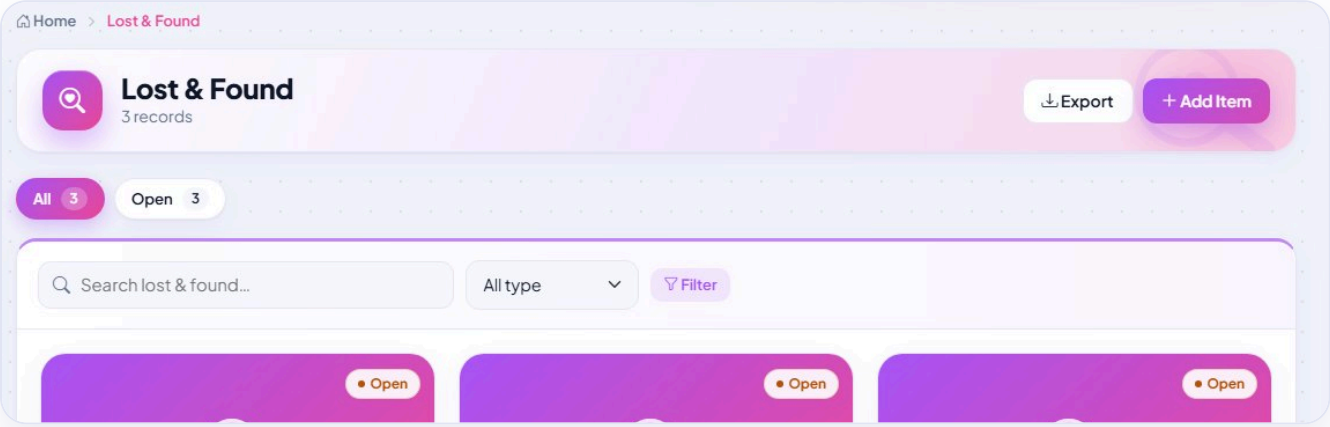
Safer than public sites · Local convenience · Community savings

COMMUNITY

Lost & Found

Reunite people with their belongings quickly.

Website Community › Lost & Found App Menu › Lost & Found



The Lost & Found screen on the website.

What it is for

Anyone can post a lost or found item with a photo and contact number. When it is returned, mark it resolved and the board stays tidy.

Lost or found
Post either type in seconds.

Photos
Help owners recognise their items.

Contact number
Direct line to the finder or owner.

Resolve with one tap
Close the post after handover.

Guard access
Security can log items handed over at the gate.

Pet alerts
Lost pets reach everyone fast.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Moderate and resolve posts.
Accountant	view, add, edit — their own records only
Security	view, add, edit Log items found at the gate.
Resident	view, add, edit — their own records only Post and resolve items.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Item	Text	**Yes**	What was lost or found, e.g. "Black wallet".
Type	Choose one	**Yes**	Lost or Found. Choose one: Lost, Found
Contact No.	Phone	No	A phone number.
Status	Choose one	No	Choose one: Open, Resolved
Photos	Photos	No	Up to 8 photos help others recognise the item.
Description	Long text	No	Write the details in your own words.

Add a item — the basics

ON THE WEBSITE

1. Open **Community** in the sidebar and click **Lost & Found**.
2. Click **+ Add Item** at the top right. A panel slides in.
3. Fill the required fields (Item, Type).
4. Under **Photos** select up to 8 pictures at once.
5. Press **Create Item**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Lost & Found** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Item** at the bottom right.
3. Fill the required fields (Item, Type).
4. Tap **Add photos** and choose several pictures; ✕ removes one.
5. Tap **Create Item**.

Who can add lost & found?
Society Admin, Accountant, Security, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Report a lost or found item

Resident / Security

ON THE WEBSITE

1. Open **Community** → **Lost & Found** → **+ Add Item**.
2. Choose **Lost** or **Found**, describe it, add photos and your phone number.
3. Click **Create Item**.

IN THE ANDROID APP

1. Menu → Lost & Found → **Add Item** → fill and add photos → **Create Item**.

Close the case

Anyone involved

ON THE WEBSITE

1. Press **Mark Resolved** on the item.

IN THE ANDROID APP

1. Open the item and tap **Mark Resolved**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Mark Resolved	Resident, Society Admin, Security, Accountant	When the status is open

Items returned faster · Community goodwill · Less gate hassle

04

PART 4

Gate & Services

Safer gates and quicker help: visitors, parcels, the helpdesk, amenities and bookings, SOS alerts and emergency contacts.

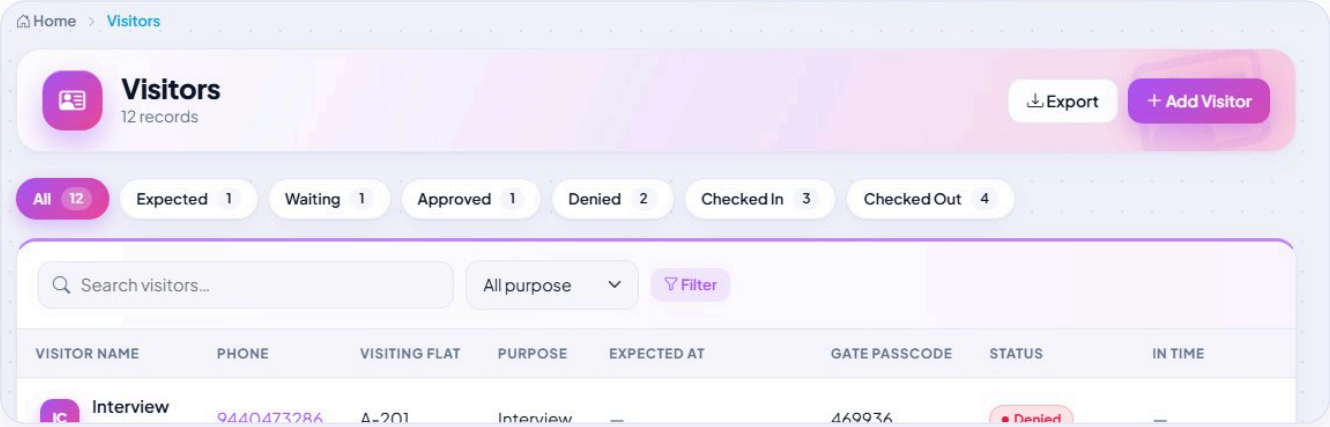
- Visitors
- Parcels & Deliveries
- Helpdesk
- Amenities
- Amenity Bookings
- SOS Alerts
- Emergency Contacts

GATE & SERVICES

Visitors

A digital gate register with resident approval.

Website Gate & Services › Visitors App Menu › Visitors



The Visitors screen on the website.

What it is for

Residents pre-approve guests and get a passcode; guards log walk-ins and residents allow or deny from their phone. Every entry and exit is time-stamped — a complete, searchable gate history.

Pre-approval with passcode
Residents invite guests and share a 6-digit code.

Walk-in approval
Guard logs a visitor, resident gets an instant alert to allow or deny.

Check-in / check-out
Two-tap entry and exit with timestamps.

Purpose & vehicle
Guest, delivery, cab, service — with vehicle number.

Live gate dashboard
See who is inside right now.

Full history & export
Search any visitor and download CSV.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Review the complete visitor log.
Accountant	view Read-only visibility.
Security	view, add, edit Log, check in and out, and track visitors.
Resident	view, add, edit — records of their own flat only Pre-approve guests; allow or deny walk-ins.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Visitor Name	Text	**Yes**	Name as the guest will say it at the gate.
Phone	Phone	No	A phone number.
Visiting Flat	Choose one	**Yes**	The flat being visited. Residents are limited to their own flat. Residents do not fill this in: it is set for them, or by staff.
Purpose	Choose one	No	Guest, delivery, cab, service, interview or other. Choose one: Guest, Delivery, Cab, Service, Interview, Other
No. of Persons	Number	No	Enter a number.
Vehicle No.	Text	No	Type the text.
Expected At	Date & time	No	When you expect them. Guards see it in their list.
Gate Passcode	Text	No	A 6-digit code created for you. Give it to your guest.

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Status	Choose one	No	Expected → Waiting → Approved/Denied → Checked In → Checked Out. Choose one: Expected, Waiting, Approved, Denied, Checked In, Checked Out Residents do not fill this in: it is set for them, or by staff.
In Time	Date & time	No	Pick a date and time. Residents do not fill this in: it is set for them, or by staff.
Out Time	Date & time	No	Pick a date and time. Residents do not fill this in: it is set for them, or by staff.

Add a visitor — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Visitors**.
2. Click **+ Add Visitor** at the top right. A panel slides in.
3. Fill the required fields (Visitor Name, Visiting Flat).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Visitor**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Visitors** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Visitor** at the bottom right.
3. Fill the required fields (Visitor Name, Visiting Flat).
4. Red text under a box tells you what to correct.
5. Tap **Create Visitor**.

Who can add visitors?
Society Admin, Security, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Pre-approve a guest Resident

ON THE WEBSITE

1. Open **Gate & Services** → **Visitors** and click **+ Add Visitor**.
2. Enter the guest name, phone, purpose and expected time.
3. Click **Create Visitor**. Status becomes **Expected** and a 6-digit passcode is generated.
4. Share the passcode with your guest. Security is notified.

IN THE ANDROID APP

1. On the dashboard tap **Pre-approve** (or Menu → Visitors → **Add Visitor**).
2. Fill in the guest details and tap **Create Visitor**.
3. Open the visitor to read the passcode and tell your guest.

Log a walk-in at the gate Security

ON THE WEBSITE

1. Open **Visitors**, click **+ Add Visitor**, enter name, flat and purpose, set Status to **Waiting**.
2. Save. The flat's residents receive "Visitor at the gate".

IN THE ANDROID APP

1. Menu → Visitors → **Add Visitor**, set Status to Waiting and save.

Allow or deny a visitor at your door Resident

ON THE WEBSITE

1. Tap the push notification or open Visitors.
2. Press **Allow** or **Deny** next to the person.

IN THE ANDROID APP

1. Tap the "Visitor at the gate" notification.
2. On the visitor screen tap **Allow** or **Deny**. Security sees the decision at once.

Check a guest in and out Security

ON THE WEBSITE

1. Find the visitor (use the search box or the status chips).
2. Press **Check In** when they enter and **Check Out** when they leave. Times are recorded automatically.

IN THE ANDROID APP

1. Open the visitor and tap **Check In**, later **Check Out**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Allow	Resident, Society Admin	When the status is waiting
Deny	Resident, Society Admin	When the status is waiting or expected or approved
Check In	Security, Society Admin	When the status is expected or approved
Check Out	Security, Society Admin	When the status is checked in

Who is notified

Security gets **"Expected visitor"** when a resident pre-approves.

The flat gets **"Visitor at the gate"** for walk-ins and **"… has entered"** on check-in.

Security gets **"Visitor allowed / denied"** from the resident's decision.

Common questions

QUESTION	ANSWER
What if the resident does not answer?	The guard can call the flat from the visitor record; the status stays Waiting until someone allows or denies.
Does the passcode expire?	It is tied to the visitor record. Create a new visitor for each visit.

Safer premises · Faster entry · Zero paper registers

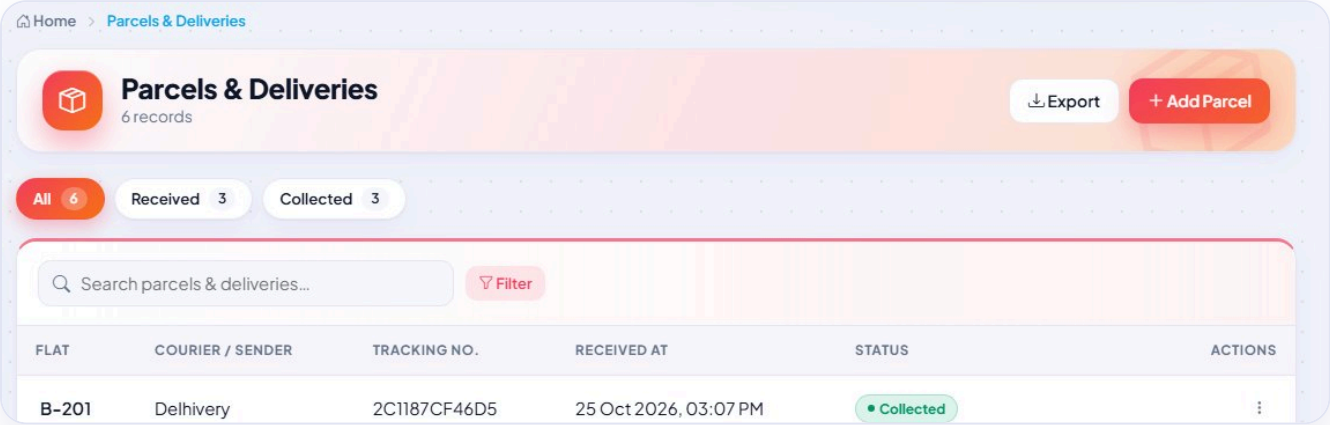
GATE & SERVICES

Parcels & Deliveries

Never miss a package again.

Website Gate & Services › Parcels & Deliveries

App Menu › Parcels & Deliveries



The Parcels & Deliveries screen on the website.

What it is for

Guards log every parcel with courier and tracking number. The resident is notified immediately and collects it from the gate — with the handover recorded for accountability.

Quick parcel log
Courier, tracking number, flat and notes.

Instant alert
Resident is notified the moment a parcel arrives.

Collection tracking
Mark collected with who and when.

Pending list
Guards see uncollected parcels on their dashboard.

Resident self-confirm
Residents can mark their own parcels collected.

History
Complete record to resolve missing-parcel claims.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Oversee all parcels.
Accountant	view
Security	view, add, edit Log, hold and hand over parcels.
Resident	view — records of their own flat only Get alerts and confirm collection.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Flat	Choose one	**Yes**	The flat the parcel is for.
Courier / Sender	Text	**Yes**	e.g. Amazon, Flipkart, Swiggy.
Tracking No.	Text	No	Optional, helps match with an order.
Received At	Date & time	No	Pick a date and time.
Status	Choose one	No	Received until the resident collects it. Choose one: Received, Collected
Collected By	Text	No	Type the text.
Notes	Text	No	Type the text.

Add a parcel — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Parcels & Deliveries**.
2. Click **+ Add Parcel** at the top right. A panel slides in.
3. Fill the required fields (Flat, Courier / Sender).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Parcel**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Parcels & Deliveries** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Parcel** at the bottom right.
3. Fill the required fields (Flat, Courier / Sender).
4. Red text under a box tells you what to correct.
5. Tap **Create Parcel**.

Who can add parcels & deliveries?
Society Admin, Security.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Log a parcel at the gate Security

ON THE WEBSITE

1. Open **Gate & Services** → **Parcels & Deliveries** → **+ Add Parcel**.
2. Choose the flat, enter courier and tracking number.
3. Click **Create Parcel**. The flat is notified.

IN THE ANDROID APP

1. Menu → Parcels & Deliveries → **Add Parcel** → fill → **Create Parcel**.

Hand over a parcel Security / Resident

ON THE WEBSITE

1. Press **Mark Collected** when the resident takes it.

IN THE ANDROID APP

1. Open the parcel and tap **Mark Collected**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Mark Collected	Security, Society Admin, Resident	When the status is received

Who is notified

Everyone in the flat receives **"Parcel received at the gate"** with the courier name.

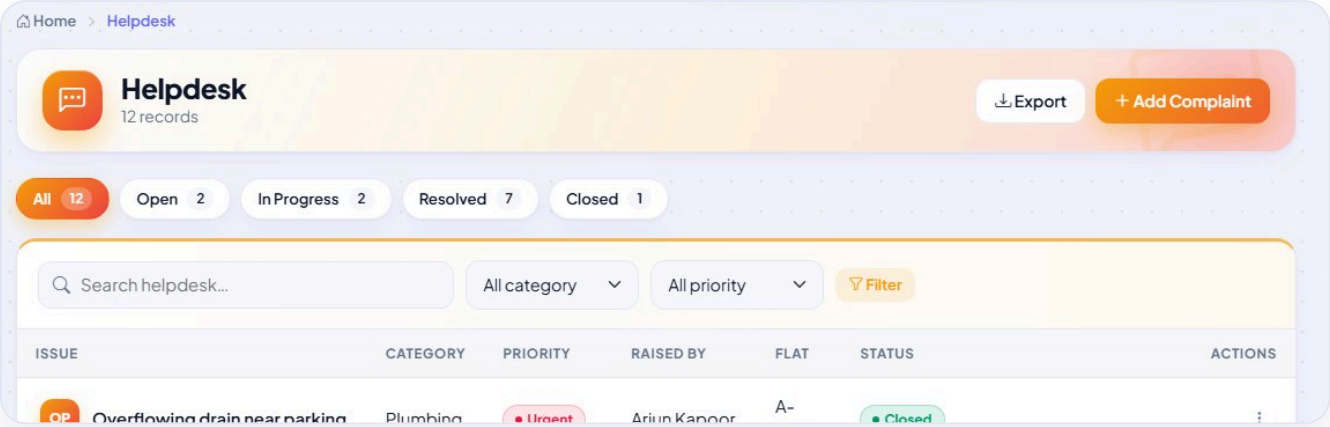
No lost parcels · Happier residents · Clear accountability

GATE & SERVICES

Helpdesk

Raise, assign and resolve issues with full visibility.

Website Gate & Services › Helpdesk **App** Menu › Helpdesk



The Helpdesk screen on the website.

What it is for

Residents report plumbing, lift, electrical or cleaning issues with photos and priority. Admins assign work, update status and record the resolution — and the resident is notified at every step.

Photo & priority
Describe the issue, attach a picture, set priority.

Status workflow
Open → In progress → Resolved with one-tap actions.

Assignment
Record who is handling the job.

Resolution notes
Document what was done.

Reopen option
Residents can reopen unresolved issues.

Analytics
Complaints by category on the admin dashboard.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Triage, assign and resolve complaints.
Accountant	view View for expense linkage.
Security	view See safety-related issues.
Resident	view, add, edit — their own records only Raise and track complaints.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Issue	Text	**Yes**	A short title, e.g. "Lift not working in B wing".
Category	Choose one	No	Plumbing, electrical, lift, security, cleaning, noise, parking, water or other.
Priority	Choose one	No	Low, medium, high or urgent. Choose one: Low, Medium, High, Urgent
Raised By	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Flat	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Status	Choose one	No	Choose one: Open, In Progress, Resolved, Closed Residents do not fill this in: it is set for them, or by staff.
Assigned To	Text	No	Admin only. The person fixing the issue. Residents do not fill this in: it is set for them, or by staff.
Describe the issue	Long text	**Yes**	What happened, since when, exact location.

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Photos (optional)	Photos	No	Up to 8 photos of the problem.
Resolution Notes	Long text	No	Admin only. Explain how it was fixed. Residents do not fill this in: it is set for them, or by staff.

Add a complaint — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Helpdesk**.
2. Click **+ Add Complaint** at the top right. A panel slides in.
3. Fill the required fields (Issue, Describe the issue).
4. Under **Photos** select up to 8 pictures at once.
5. Press **Create Complaint**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Helpdesk** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Complaint** at the bottom right.
3. Fill the required fields (Issue, Describe the issue).
4. Tap **Add photos** and choose several pictures; ✕ removes one.
5. Tap **Create Complaint**.

Who can add helpdesk?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Raise a complaint with photos Resident

ON THE WEBSITE

1. Open **Gate & Services** → **Helpdesk** → **+ Add Complaint**.
2. Type the issue and description, choose category and priority.
3. Attach photos if useful, then click **Create Complaint**.

IN THE ANDROID APP

1. On the dashboard tap **Complaint** (or Menu → Helpdesk → **Add Complaint**).
2. Fill the form and tap **Add photos** for pictures.
3. Tap **Create Complaint**.

Work a complaint to resolution Admin

ON THE WEBSITE

1. Open the complaint → press **Start Work** (status: In Progress).
2. Choose **Assigned To** via Edit if needed.
3. When fixed press **Mark Resolved** and add **Resolution Notes**.

IN THE ANDROID APP

1. Open the complaint → **Start Work** → later **Mark Resolved**.

Reopen if it is not fixed Resident

ON THE WEBSITE

1. Open the complaint and press **Reopen**.

IN THE ANDROID APP

1. Open the complaint and tap **Reopen**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Start Work	Society Admin	When the status is open
Mark Resolved	Society Admin	When the status is open or in progress
Reopen	Resident	When the status is resolved

Who is notified

Admins get **"New complaint"** with the priority when a resident raises one.

The resident gets **"Complaint updated — … is now in progress / resolved"**.

Common questions

QUESTION	ANSWER
Who can see my complaint?	You and the society admin. Other residents cannot see it.

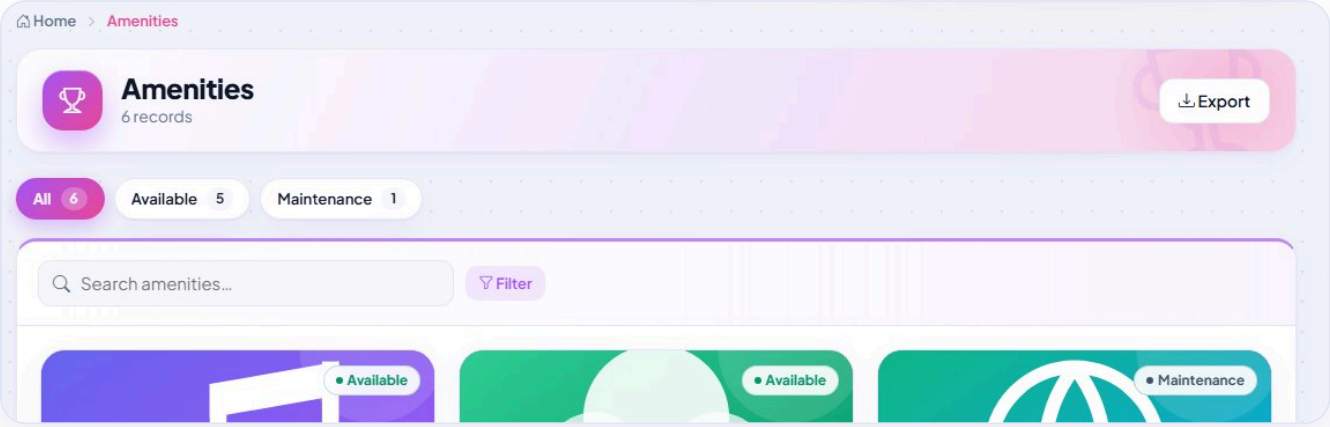
Faster resolutions · Accountable service · Happier residents

GATE & SERVICES

Amenities

Conflict-free booking of clubhouse, pool, gym and more.

Website Gate & Services › Amenities **App** Menu › Amenities



The Amenities screen on the website.

What it is for

Showcase your amenities with photos, timings and hourly fees. Residents pick a date and slot; the system blocks clashes, respects opening hours and calculates the fee automatically.

Amenity cards
Photos, capacity, hours and fee per hour.

Clash detection
Double bookings are blocked automatically.

Opening-hour checks
Bookings must fall within amenity timings.

Auto fee calculation
Amount = hours × hourly fee.

Approval workflow
Admin approves or rejects requests.

Cancel anytime
Residents can cancel pending bookings.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Configure amenities and approve bookings.
Accountant	view View booking revenue.
Security	view Know who is using the facilities.
Resident	view Book and cancel from the app.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Amenity Name	Text	**Yes**	Clubhouse, swimming pool, gym, tennis court…
Capacity (persons)	Number	No	Maximum people allowed at one time.
Fee per Hour	Amount (₹)	No	Used to calculate each booking's amount automatically.
Opens At	Time	No	Earliest booking start.
Closes At	Time	No	Latest booking end.
Status	Choose one	No	Maintenance and Closed amenities cannot be booked. Choose one: Available, Maintenance, Closed
Photos	Photos	No	Up to 8 photos shown on the amenity card.
Description	Long text	No	Write the details in your own words.

Add a amenity — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Amenities**.
2. Click **+ Add Amenity** at the top right. A panel slides in.
3. Fill the required fields (Amenity Name).
4. Under **Photos** select up to 8 pictures at once.
5. Press **Create Amenity**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Amenities** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Amenity** at the bottom right.
3. Fill the required fields (Amenity Name).
4. Tap **Add photos** and choose several pictures; ✕ removes one.
5. Tap **Create Amenity**.

Who can add amenities?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Add an amenity Admin

ON THE WEBSITE

1. Open **Gate & Services** → **Amenities** → **+ Add Amenity**.
2. Enter name, capacity, hourly fee and opening hours, add photos.
3. Click **Create Amenity**.

IN THE ANDROID APP

1. Menu → Amenities → **Add Amenity** → fill → **Create Amenity**.

Book an amenity Resident

ON THE WEBSITE

1. Open **Amenities** and press **Book Now** on the card (or go to **Amenity Bookings** → **+ Add Booking**).
2. Pick the date and the From/To times. The amount is calculated for you.
3. Click **Create Booking**.

IN THE ANDROID APP

1. Menu → Amenity Bookings → **Add Booking**.
2. Pick amenity, date and times and tap **Create Booking**.

No double bookings · Transparent fees · Well-used facilities

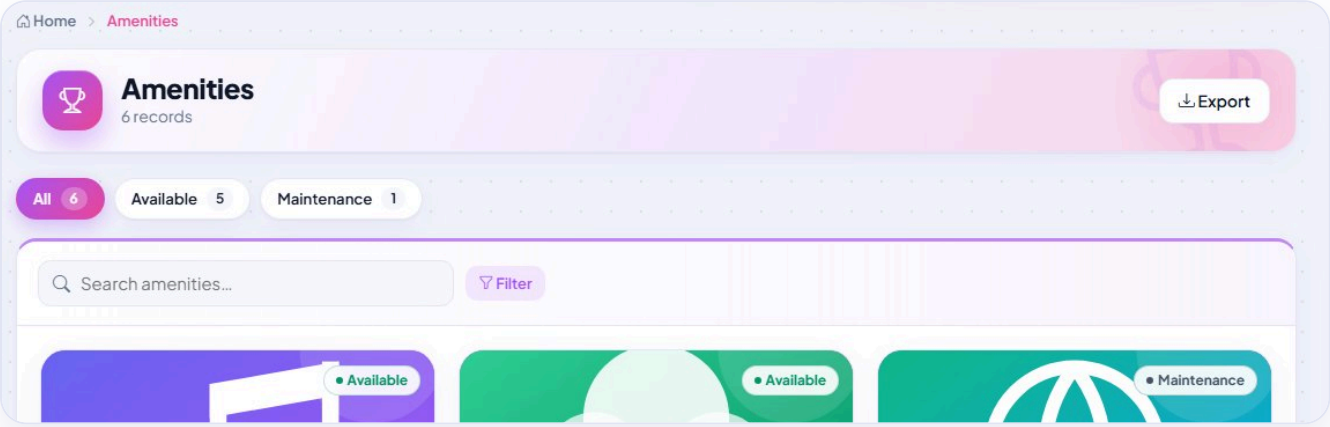
GATE & SERVICES

Amenity Bookings

A booking is a reserved time slot for an amenity.

Website Gate & Services › Amenity Bookings

App Menu › Amenity Bookings



The Amenity Bookings screen on the website.

What it is for

A booking is a reserved time slot for an amenity. The system blocks double bookings, respects opening hours and works out the fee from the hourly rate.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete
Accountant	view
Security	view
Resident	view, add, edit — their own records only

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Amenity	Choose one	**Yes**	Only amenities that are Available are listed.
Booked By	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Date	Date	**Yes**	You cannot book a day in the past.
From	Time	**Yes**	Start time, inside opening hours.
To	Time	**Yes**	End time, after the start. The fee is rounded to a minimum of half an hour.
Guests	Number	No	Optional number of guests.
Amount	Amount (₹)	No	Calculated automatically. You cannot edit it.
Status	Choose one	No	Pending until the admin approves. Choose one: Pending, Approved, Rejected, Cancelled Residents do not fill this in: it is set for them, or by staff.

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Purpose	Text	No	Type the text.

Add a booking — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Amenity Bookings**.
2. Click **+ Add Booking** at the top right. A panel slides in.
3. Fill the required fields (Amenity, Date, From, To).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Booking**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Amenity Bookings** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Booking** at the bottom right.
3. Fill the required fields (Amenity, Date, From, To).
4. Red text under a box tells you what to correct.
5. Tap **Create Booking**.

Who can add amenity bookings?
Society Admin, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**. Residents can change only their own records.

Approve or reject a booking Admin

ON THE WEBSITE

1. Open **Gate & Services** → **Amenity Bookings**.
2. Press **Approve** or **Reject** on the pending booking.

IN THE ANDROID APP

1. Menu → Amenity Bookings → open the booking → **Approve** or **Reject**.

Cancel your booking Resident

ON THE WEBSITE

1. Open the booking and press **Cancel**.

IN THE ANDROID APP

1. Open the booking and tap **Cancel**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Approve	Society Admin	When the status is pending
Reject	Society Admin	When the status is pending
Cancel	Resident	When the status is pending or approved

Who is notified

Admins get **"New amenity booking request"**.

Residents are notified when their booking is approved, rejected or changed by staff.

Common questions

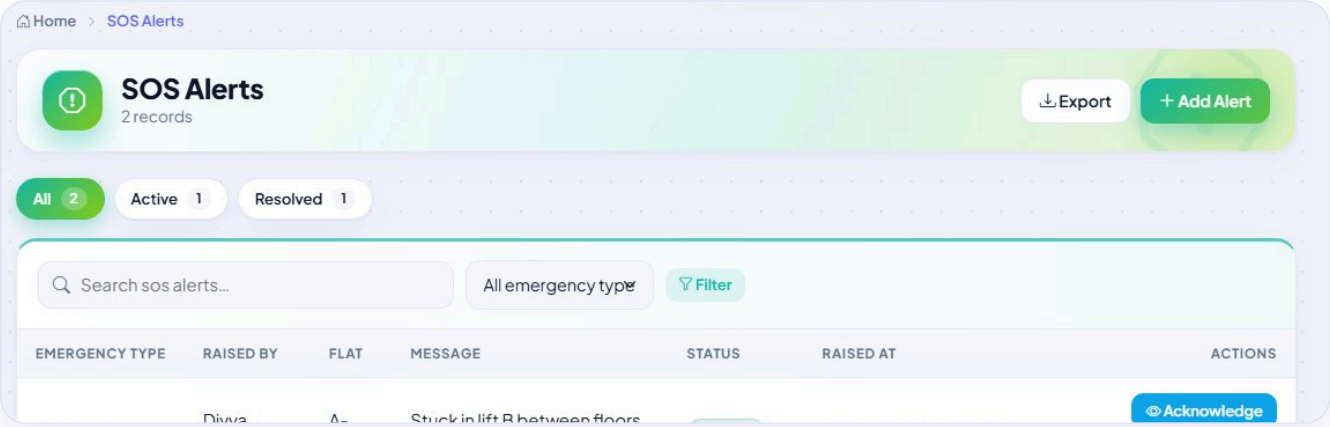
QUESTION	ANSWER
"That slot is already booked."	Another approved or pending booking overlaps. Choose a different time.

GATE & SERVICES

SOS Alerts

One tap brings help from the guards and committee.

Website Gate & Services › SOS Alerts **App** Menu › SOS Alerts



The SOS Alerts screen on the website.

What it is for

In a medical, fire, theft or lift emergency a resident presses SOS. Admins and guards are alerted instantly with the resident's name and flat, and a live banner stays on their dashboards until the alert is resolved.

One-tap SOS
A pulsing SOS button on every resident screen.

Emergency types
Medical, fire, theft, lift stuck, gas leak and more.

Instant notifications
Admin and security alerted with name and flat.

Live alert banner
Active alerts glow on dashboards.

Acknowledge & resolve
Track response status end to end.

Incident history
Learn from past emergencies.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Respond to and resolve alerts.
Security	view, add, edit First responders — acknowledge and resolve.
Resident	view, add — their own records only Raise an alert in seconds.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Emergency Type	Choose one	Yes	Medical, fire, theft, lift stuck, gas leak or other. Choose one: Medical, Fire, Theft, Lift Stuck, Gas Leak, Other
Raised By	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Flat	Choose one	No	Residents do not fill this in: it is set for them, or by staff.
Message	Text	No	Optional extra detail, e.g. "Elderly person fell in bathroom".
Status	Choose one	No	Choose one: Active, Acknowledged, Resolved Residents do not fill this in: it is set for them, or by staff.

Add a alert — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **SOS Alerts**.
2. Click **+ Add Alert** at the top right. A panel slides in.
3. Fill the required fields (Emergency Type).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Alert**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **SOS Alerts** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Alert** at the bottom right.
3. Fill the required fields (Emergency Type).
4. Red text under a box tells you what to correct.
5. Tap **Create Alert**.

Who can add sos alerts?
Society Admin, Security, Resident.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Raise an SOS in an emergency Resident

ON THE WEBSITE

1. Open **Gate & Services → SOS Alerts → + Add Alert**.
2. Choose the emergency type, add a short message.
3. Click **Create Alert**. Admins and guards are alerted instantly.

IN THE ANDROID APP

1. Menu → SOS Alerts → **Add Alert**, choose the type and tap **Create Alert**.
2. Keep your phone near you; guards will call or come to your flat.

Respond to an alert

Security / Admin

ON THE WEBSITE

1. Press **Acknowledge** as soon as you start responding.
2. Press **Resolve** when the situation is handled.

IN THE ANDROID APP

1. Tap the push notification → **Acknowledge** → later **Resolve**.

Buttons on a record

BUTTON	WHO CAN PRESS IT	WHEN
Acknowledge	Society Admin, Security	When the status is active
Resolve	Society Admin, Security	When the status is active or acknowledged

Who is notified

Admins and security receive "🚨 **SOS: …**" with the resident's name and flat, as an in-app alert and a phone push.

Common questions

QUESTION	ANSWER
Is SOS a replacement for calling 100 / 112?	No. In a serious emergency also call the official emergency numbers. SOS informs your society team.

Faster emergency response · Peace of mind · Documented incidents

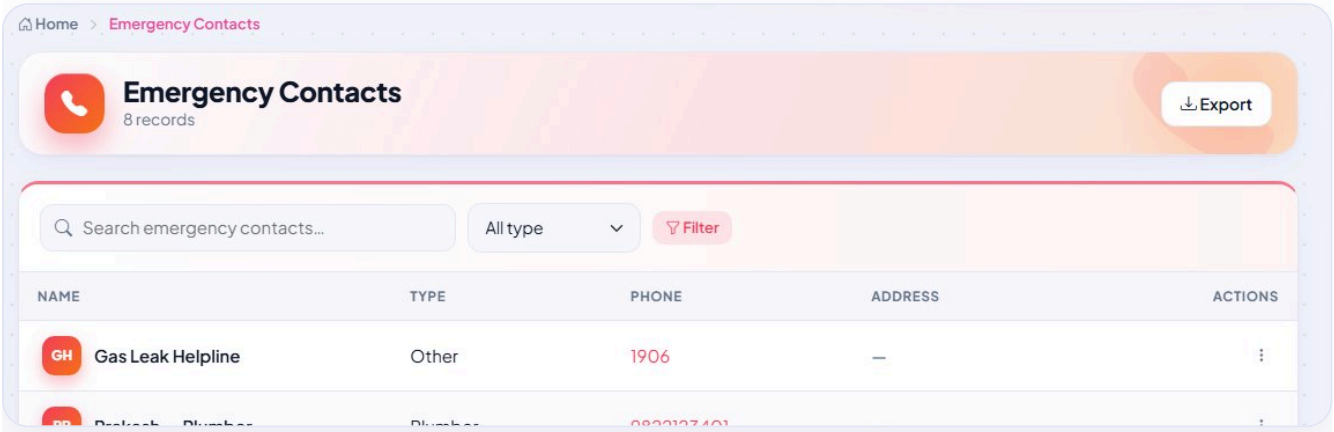
GATE & SERVICES

Emergency Contacts

Every important number, one tap away.

Website Gate & Services › Emergency Contacts

App Menu › Emergency Contacts



The Emergency Contacts screen on the website.

What it is for

Keep police, fire, ambulance, hospitals, electricians and plumbers in a tidy directory that residents can call straight from their phones.

Categorised numbers
Police, fire, ambulance, hospital, utilities and more.

Tap to call
Phone numbers are click-to-call on mobile.

Local services
Add trusted electricians, plumbers and the society office.

Dashboard shortcut
Helplines tile on the resident home.

Easy maintenance
Admins update numbers in seconds.

Always available
Works on any device.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Maintain the directory.
Accountant	view
Security	view Quick reference at the gate.
Resident	view Call the right number instantly.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Name	Text	**Yes**	Type the text.
Type	Choose one	No	Police, fire, ambulance, hospital, electrician, plumber, society office or other. Choose one: Police, Fire, Ambulance, Hospital, Electrician, Plumber, Society Office, Other
Phone	Phone	**Yes**	Residents can tap the number to call.
Address	Text	No	Type the text.

Add a contact — the basics

ON THE WEBSITE

1. Open **Gate & Services** in the sidebar and click **Emergency Contacts**.
2. Click **+ Add Contact** at the top right. A panel slides in.
3. Fill the required fields (Name, Phone).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Contact**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Emergency Contacts** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Contact** at the bottom right.
3. Fill the required fields (Name, Phone).
4. Red text under a box tells you what to correct.
5. Tap **Create Contact**.

Who can add emergency contacts?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Keep the list current Admin

ON THE WEBSITE

1. Open **Gate & Services** → **Emergency Contacts** → **+ Add Contact**.
2. Enter name, type and phone. Save.

IN THE ANDROID APP

1. Menu → Emergency Contacts → **Add Contact**.

Call a contact Everyone

ON THE WEBSITE

1. Click the phone number to call from your computer's dialer or phone.

IN THE ANDROID APP

1. Open the contact and tap the phone number.

Help in seconds
Trusted vendors
Always up to date

05

PART 5

Finance

Money matters made simple: maintenance bills, payments verified by the admin, receipts, expenses, vendors and contracts.

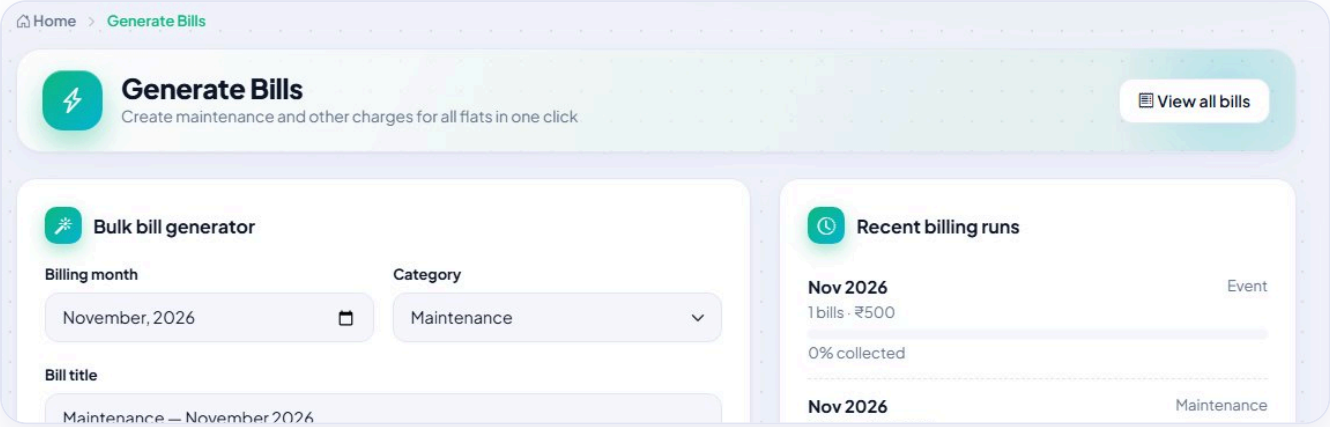
- Maintenance Bills
- Payments & Receipts
- Expenses
- Vendors & Services
- AMC & Contracts

FINANCE

Maintenance Bills

Generate every flat's bill in one click.

Website Finance › Maintenance Bills **App** Menu › Maintenance Bills



The Maintenance Bills screen on the website.

What it is for

Create monthly maintenance bills for all flats — or a single block — using each flat's rate or a fixed amount. Late fees apply automatically after the due date and reminders go out with one click.

Bulk generation
All occupied flats billed in a single run.

Flexible amounts
Per-flat maintenance or fixed charges.

Multiple categories
Maintenance, water, sinking fund, parking, events, penalties.

Late fees
Automatic % penalty after the due date.

Reminders
Notify every resident with dues instantly.

Printable invoices
Branded invoice with bank details and notes.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Oversee billing and collections.
Accountant	view, add, edit, delete Generate bills, apply late fees, send reminders.
Resident	view — records of their own flat only View bills, due dates and invoices.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Bill No.	Text	No	Type the text.
Flat	Choose one	**Yes**	The flat being billed.
Description	Text	**Yes**	e.g. "Maintenance – November".
Category	Choose one	No	Maintenance, water, sinking fund, parking, penalty, event or other. Choose one: Maintenance, Water, Sinking Fund, Parking, Penalty, Event, Other
Bill Month	Month	No	The month it belongs to.
Amount	Amount (₹)	**Yes**	The base amount before any late fee.
Late Fee	Amount (₹)	No	Added automatically when you apply late fees.
Paid Amount	Amount (₹)	No	Updated automatically when a payment is approved. Residents do not fill this in: it is set for them, or by staff.

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Due Date	Date	No	After this date the bill can be marked overdue.
Status	Choose one	No	Unpaid, partial, paid or overdue; updated by payments. Choose one: Unpaid, Partial, Paid, Overdue

Add a bill — the basics

ON THE WEBSITE

1. Open **Finance** in the sidebar and click **Maintenance Bills**.
2. Click **+ Add Bill** at the top right. A panel slides in.
3. Fill the required fields (Flat, Description, Amount).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Bill**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Maintenance Bills** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Bill** at the bottom right.
3. Fill the required fields (Flat, Description, Amount).
4. Red text under a box tells you what to correct.
5. Tap **Create Bill**.

Who can add maintenance bills?
Society Admin, Accountant.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Generate bills for the whole society Admin / Accountant

ON THE WEBSITE

1. Open **Finance** → **Maintenance Bills** and click **Generate bills**.
2. Choose **Billing month**, **Category** and a **Bill title**.
3. Pick **Amount basis**: each flat's monthly maintenance, or the same fixed amount for all.
4. Choose **Apply to** all occupied flats or one block, set the **Due date**.
5. Press **Generate bills**. Flats that already have this bill are skipped and residents are notified.

IN THE ANDROID APP

1. Menu → Maintenance Bills → tap the **Billing tools** icon in the top bar.
2. Fill the billing month, title, amount basis and due date, then tap **Generate bills**.

Apply late fees and send reminders Admin / Accountant

ON THE WEBSITE

1. On the Bills page click **Apply late fees** to mark overdue bills and add the late-fee percentage.
2. Click **Send reminders** to notify every resident who still owes money.

IN THE ANDROID APP

1. Tap the **Billing tools** icon → **Apply late fees** or **Send payment reminders**.

Pay your bill (UPI) Resident

ON THE WEBSITE

1. Open **Finance** → **Maintenance Bills**, press **Pay Now** on the bill.
2. Check the amount (you may pay part of it).
3. Pay the society's UPI ID from any UPI app (the **Open UPI app** button helps on a phone).
4. Back in Socivio, type the **UPI / transaction reference (UTR)** from your payment app.
5. Press **Submit payment**. The bill stays unpaid until the admin verifies the money.

IN THE ANDROID APP

1. Open the bill and tap **Pay Now**.
2. Tap **Open UPI app** and pay. Or copy the UPI ID with the copy button.
3. Enter the **UTR** shown in your payment app.
4. Tap **Submit payment**. You see "Sent for verification". A receipt is issued after the admin approves.

Print a bill Everyone

ON THE WEBSITE

1. Press **Print Bill** on any bill to open a printable invoice.

IN THE ANDROID APP

1. Open the bill to see the invoice details and its payments.

Who is notified

Residents get **"New bill: … due …"** as soon as a bill is created.

Residents get **"Payment reminder"** when you send reminders.

Common questions

QUESTION	ANSWER
Why is my bill still unpaid after I paid?	Payments are confirmed by the society admin after they see the money in the bank. You will get a notification when it is approved.
Can I pay only a part?	Yes. Enter a smaller amount; the bill becomes Partial until the rest is paid.

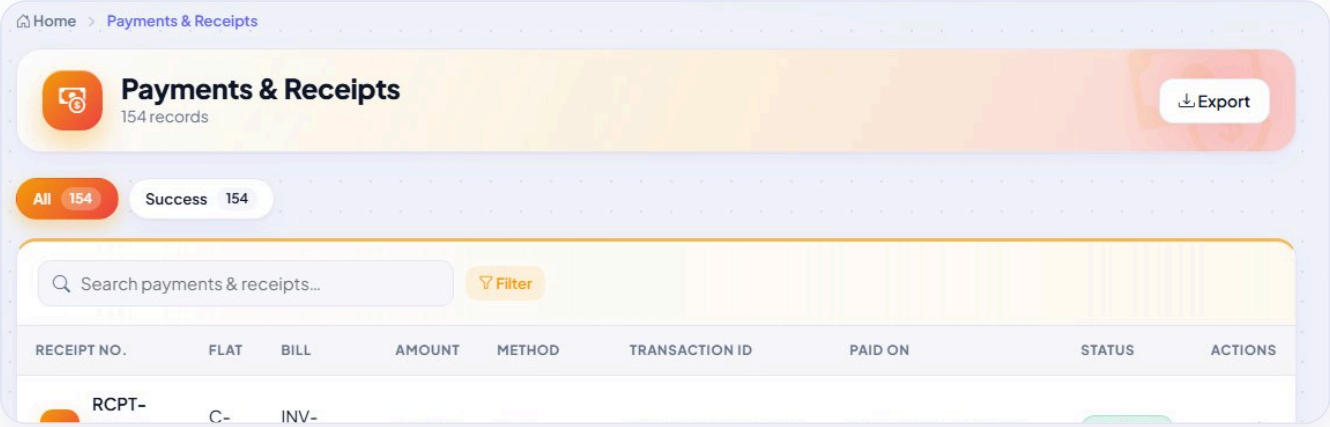
Higher collection rates · Hours saved every month · Zero billing errors

FINANCE

Payments & Receipts

Collect online and issue receipts instantly.

Website Finance › Payments & Receipts **App** Menu › Payments & Receipts



The Payments & Receipts screen on the website.

What it is for

Residents pay by UPI, card or net banking — in full or in part — and get a professional receipt immediately. Admins can also record cash or cheque payments, and every rupee is tracked.

Online checkout
UPI, card and net banking from any device.

Part payments
Pay a portion now, the rest later.

Offline entries
Accountants record cash and cheque.

Instant receipts
Printable, numbered receipts with PAID stamp.

Payment history
Full ledger per flat.

Notifications
Admins and residents alerted on every payment.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, delete Monitor all payments.
Accountant	view Record offline payments and reconcile.
Resident	view — records of their own flat only Pay online and download receipts.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Receipt No.	Text	No	Created only after a payment is approved.
Flat	Choose one	No	
Bill	Choose one	No	
Amount	Amount (₹)	No	Enter the amount in rupees.
Method	Choose one	No	UPI, card, net banking, cash or cheque. Choose one: Upi, Card, Netbanking, Cash, Cheque
Transaction ID	Text	No	The UTR or reference. Each reference can be used only once.
Paid On	Date & time	No	Pick a date and time.
Status	Choose one	No	Pending (waiting for verification), Success (receipt issued) or Failed (rejected). Choose one: Pending, Success, Failed

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Verify a payment reported by a resident Admin / Accountant

ON THE WEBSITE

1. Open **Finance** → **Payments & Receipts** and click the **Pending** chip.
2. Compare the amount and **Transaction ID (UTR)** with your bank statement.
3. If it matches press **Approve payment**. A receipt is issued and the bill is updated.
4. If it does not match press **Reject payment**. The resident is told it could not be verified.

IN THE ANDROID APP

1. Menu → Payments & Receipts → filter **Pending**.
2. Open the payment, check the UTR against the bank and tap **Approve payment** or **Reject payment**.

Record cash or a cheque Admin / Accountant

ON THE WEBSITE

1. On the bill press **Pay Now** (Record payment).
2. Choose Cash or Cheque, add the cheque number in the reference box, press **Record payment**.
3. The receipt is issued immediately because the money is already in your hand.

IN THE ANDROID APP

1. Open the bill, tap **Pay Now**, choose cash or cheque, tap **Record**.

Open or print a receipt Everyone concerned

ON THE WEBSITE

1. Press **Receipt** beside a successful payment.

IN THE ANDROID APP

1. Open the payment and tap **Receipt**.

Who is notified

Admins and accountants get **"Verify payment"** when a resident submits a reference.

The resident gets **"Payment received"** with the receipt number on approval, or **"Payment not verified"** on rejection.

Common questions

QUESTION	ANSWER
Why can a resident not get a receipt instantly?	To keep the books honest. A receipt exists only after a person has seen the money arrive.

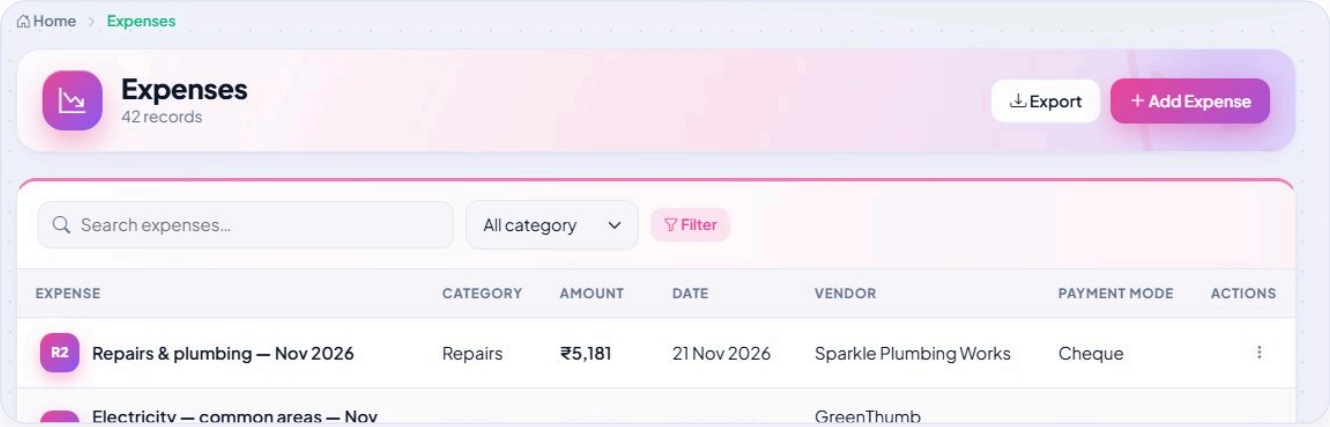
Faster collections · Transparent ledger · Paperless receipts

FINANCE

Expenses

Know exactly where society money goes.

Website Finance › Expenses App Menu › Expenses



The Expenses screen on the website.

What it is for

Record every expense with category, vendor, payment mode and invoice. Monthly totals and category breakdowns make budgeting and audits effortless.

Categories
Salary, repairs, utilities, security, cleaning, AMC and more.

Vendor linkage
Tie expenses to your vendor list.

Invoice upload
Attach bills for audit.

Payment modes
Cash, UPI, cheque, bank transfer, card.

Monthly trends
Charts of spending over time.

CSV export
Hand data to your auditor.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Review and approve spending.
Accountant	view, add, edit, delete Record and categorise every expense.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Expense	Text	**Yes**	What the money was spent on.
Category	Choose one	No	Salary, repairs, utilities, security, cleaning, garden, events, AMC, legal or other.
Amount	Amount (₹)	**Yes**	Enter the amount in rupees.
Date	Date	**Yes**	Pick a date.
Vendor	Choose one	No	
Payment Mode	Choose one	No	Cash, UPI, cheque, bank transfer or card. Choose one: Cash, Upi, Cheque, Bank Transfer, Card
Invoice / Bill	File	No	Attach the vendor's bill so audits are easy.
Notes	Text	No	Type the text.

Add a expense — the basics

ON THE WEBSITE

1. Open **Finance** in the sidebar and click **Expenses**.
2. Click **+ Add Expense** at the top right. A panel slides in.
3. Fill the required fields (Expense, Amount, Date).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Expense**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Expenses** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Expense** at the bottom right.
3. Fill the required fields (Expense, Amount, Date).
4. Red text under a box tells you what to correct.
5. Tap **Create Expense**.

Who can add expenses?
Society Admin, Accountant.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Record an expense Admin / Accountant

ON THE WEBSITE

1. Open **Finance** → **Expenses** → **+ Add Expense**.
2. Enter the title, amount, date, category and vendor, attach the bill.
3. Click **Create Expense**. It appears in Reports & Analytics.

IN THE ANDROID APP

1. Menu → Expenses → **Add Expense** → fill and attach the bill → **Create Expense**.

Budget control
Audit-ready books
Spot overspending early

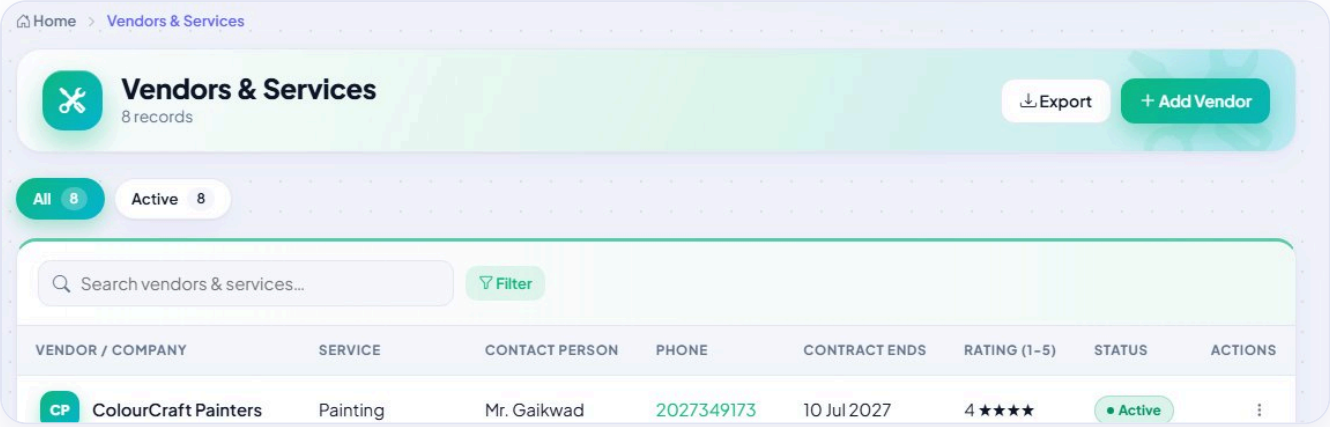
FINANCE

Vendors & Services

Your trusted service providers, rated and organised.

Website Finance › Vendors & Services

App Menu › Vendors & Services



The Vendors & Services screen on the website.

What it is for

Maintain a directory of plumbers, electricians, housekeeping and security agencies with contacts, contract end dates and ratings. Residents can see recommended vendors too.

Vendor profiles
Company, contact person, phone, email and address.

Service types
Plumbing, lift AMC, pest control, landscaping and more.

Ratings
Rate vendors 1–5 stars.

Contract dates
Know when contracts expire.

Resident visibility
Residents see trusted service numbers.

Expense linkage
Connect vendors to payments.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Manage all vendors.
Accountant	view, add, edit Add vendors and link expenses.
Security	view Know approved vendors.
Resident	view Find trusted service providers.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Vendor / Company	Text	**Yes**	Name of the service provider.
Service	Choose one	No	Plumbing, electrical, housekeeping, pest control, lift AMC, security agency and more.
Contact Person	Text	No	Type the text.
Phone	Phone	No	A phone number.
Email	Email	No	A valid email address.
Contract Ends	Date	No	The system lets you see which contracts end soon.
Rating (1–5)	Choose one	No	Your own rating of their work. Choose one: 1 ★, 2 ★★, 3 ★★★, 4 ★★★★, 5 ★★★★★
Status	Choose one	No	Choose one: Active, Inactive

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Address	Text	No	Type the text.

Add a vendor — the basics

ON THE WEBSITE

1. Open **Finance** in the sidebar and click **Vendors & Services**.
2. Click **+ Add Vendor** at the top right. A panel slides in.
3. Fill the required fields (Vendor / Company).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Vendor**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Vendors & Services** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Vendor** at the bottom right.
3. Fill the required fields (Vendor / Company).
4. Red text under a box tells you what to correct.
5. Tap **Create Vendor**.

Who can add vendors & services?
Society Admin, Accountant.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Add a vendor Admin / Accountant

ON THE WEBSITE

1. Open **Finance → Vendors & Services → + Add Vendor**.
2. Enter company, service, contact person, phone and contract end date. Save.

IN THE ANDROID APP

1. Menu → Vendors & Services → **Add Vendor**.

Reliable service · Contract awareness · Better negotiation

FINANCE

AMC & Contracts

Never miss a contract renewal again.

Website Finance › AMC & Contracts **App** Menu › AMC & Contracts



The AMC & Contracts screen on the website.

What it is for

Track annual maintenance contracts for lifts, security, housekeeping and gardens with value, dates and notes — so renewals are planned, not rushed.

Contract register
Title, vendor, start and end dates.

Contract value
Annual or total amount at a glance.

Status tracking
Active, expired or cancelled.

Vendor link
Connect each contract to its vendor.

Notes
Record terms and renewal reminders.

Finance visibility
Accountants see commitments.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Create and manage contracts.
Accountant	view Plan cash flow around renewals.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Contract	Text	**Yes**	e.g. "Lift AMC – Kone".
Vendor	Choose one	No	Pick the vendor you saved earlier.
Start Date	Date	No	Pick a date.
End Date	Date	No	Pick a date.
Contract Value	Amount (₹)	No	Yearly amount.
Status	Choose one	No	Active, expired or cancelled. Choose one: Active, Expired, Cancelled
Notes	Text	No	Type the text.

Add a contract — the basics

ON THE WEBSITE

1. Open **Finance** in the sidebar and click **AMC & Contracts**.
2. Click **+ Add Contract** at the top right. A panel slides in.
3. Fill the required fields (Contract).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Contract**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **AMC & Contracts** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Contract** at the bottom right.
3. Fill the required fields (Contract).
4. Red text under a box tells you what to correct.
5. Tap **Create Contract**.

Who can add amc & contracts?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Track a maintenance contract Admin

ON THE WEBSITE

1. Open **Finance → AMC & Contracts → + Add Contract**.
2. Choose the vendor, start and end dates, and the value. Save.
3. Set Status to Expired when it ends.

IN THE ANDROID APP

1. Menu → AMC & Contracts → **Add Contract**.

No lapsed contracts · Planned budgets · Vendor accountability

06

PART 6

Operations & Administration

Society staff and attendance, assets, the activity trail, settings and support.

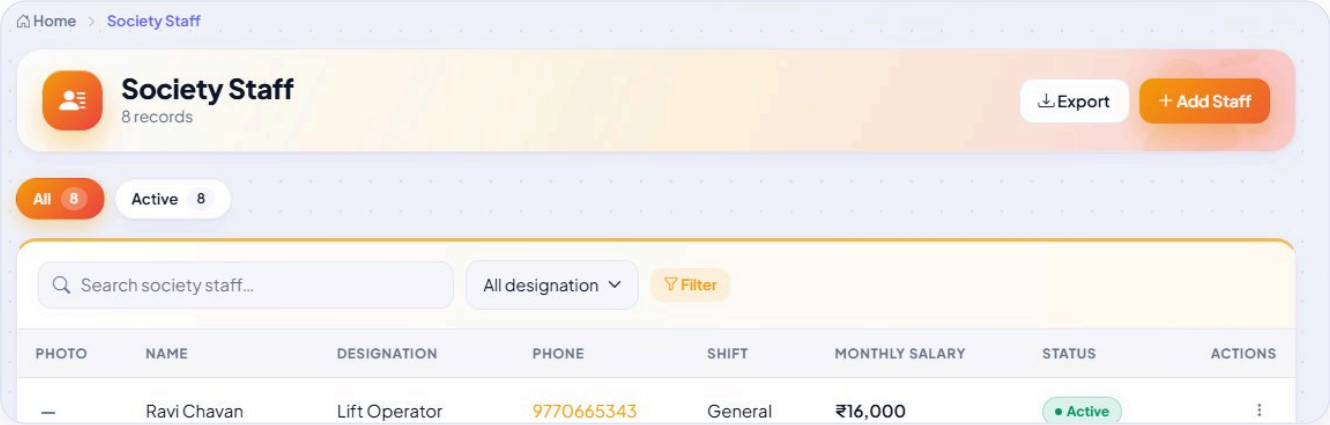
- Society Staff
- Staff Attendance
- Assets & Inventory
- Activity Logs
- Society settings
- Support and platform updates

OPERATIONS & ADMINISTRATION

Society Staff

Everyone who keeps the society running, in one list.

Website Operations › Society Staff **App** Menu › Society Staff



The Society Staff screen on the website.

What it is for

Maintain staff records — managers, guards, housekeeping, electricians — with designation, shift, salary and joining date. Guards see the roster; accountants see pay data.

Staff profiles
Name, designation, phone, photo and shift.

Salary data
Visible only to admin and accountant roles.

Shifts
Morning, evening, night and general.

Status
Active or inactive staff.

Joining dates
Tenure at a glance.

Search & filter
Find staff by role or shift.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Manage staff records.
Accountant	view View staff for payroll.
Security	view See the roster without salary data.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Photo	Photo	No	Choose a picture (up to 5 MB).
Name	Text	**Yes**	Type the text.
Designation	Choose one	No	Manager, guard, supervisor, housekeeping, gardener, electrician, plumber, lift operator or sweeper.
Phone	Phone	No	A phone number.
Shift	Choose one	No	Morning, evening, night or general. Choose one: Morning, Evening, Night, General
Monthly Salary	Amount (₹)	No	For your records only.
Joined On	Date	No	Pick a date.
Status	Choose one	No	Choose one: Active, Inactive

Add a staff — the basics

ON THE WEBSITE

1. Open **Operations** in the sidebar and click **Society Staff**.
2. Click **+ Add Staff** at the top right. A panel slides in.
3. Fill the required fields (Name).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Staff**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Society Staff** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Staff** at the bottom right.
3. Fill the required fields (Name).
4. Red text under a box tells you what to correct.
5. Tap **Create Staff**.

Who can add society staff?
Society Admin.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Add a staff member Admin

ON THE WEBSITE

1. Open **Operations** → **Society Staff** → **+ Add Staff**.
2. Enter name, photo, designation, shift, salary and joining date. Save.

IN THE ANDROID APP

1. Menu → Society Staff → **Add Staff**.

Organised workforce · Payroll clarity · Role-based privacy

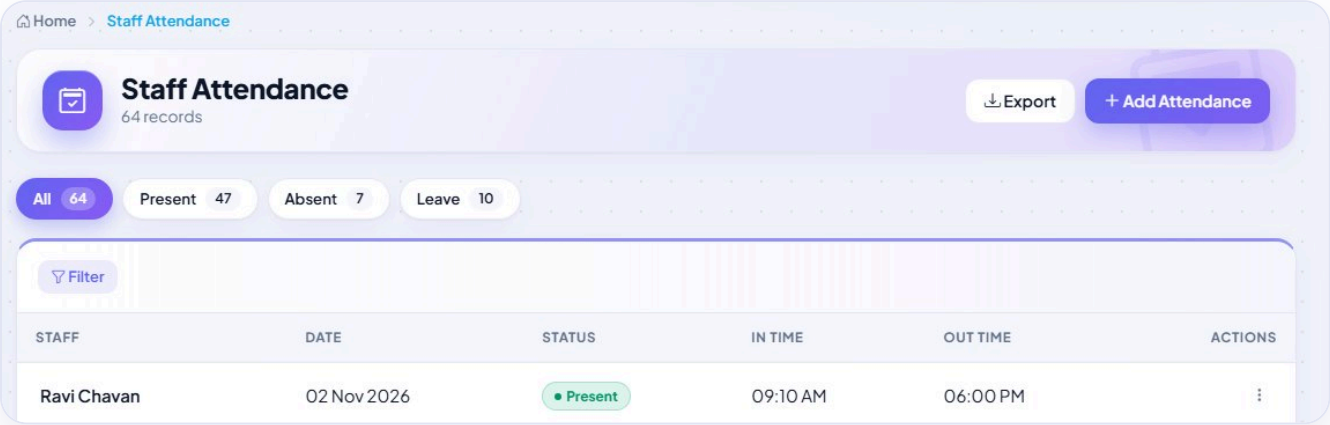
OPERATIONS & ADMINISTRATION

Staff Attendance

Mark daily attendance in seconds.

Website Operations › Staff Attendance

App Menu › Staff Attendance



The Staff Attendance screen on the website.

What it is for

Security marks present, absent, half-day or leave for every staff member with in and out times. Admins and accountants use the data for payroll and performance.

Daily marking
Present, absent, half-day, leave.

In / out times
Record arrival and departure.

Guard-friendly
Fast entry from the gate screen.

On-duty ring
Dashboard shows present vs total.

History
Review any date.

Payroll input
Reliable data for salary.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Review and correct attendance.
Accountant	view Use attendance for payroll.
Security	view, add, edit Mark attendance daily.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Staff	Choose one	**Yes**	Pick the person.
Date	Date	**Yes**	Pick a date.
Status	Choose one	No	Present, absent, half day or leave. Choose one: Present, Absent, Half, Leave
In Time	Time	No	When they arrived.
Out Time	Time	No	When they left.

Add a attendance — the basics

ON THE WEBSITE

1. Open **Operations** in the sidebar and click **Staff Attendance**.
2. Click **+ Add Attendance** at the top right. A panel slides in.
3. Fill the required fields (Staff, Date).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Attendance**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Staff Attendance** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Attendance** at the bottom right.
3. Fill the required fields (Staff, Date).
4. Red text under a box tells you what to correct.
5. Tap **Create Attendance**.

Who can add staff attendance?
Society Admin, Security.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Mark attendance for the day

Admin / Security

ON THE WEBSITE

1. Open **Operations** → **Staff Attendance** → **+ Add Attendance**.
2. Choose the staff member, date and status, add in/out times. Save.

IN THE ANDROID APP

1. Menu → Staff Attendance → **Add Attendance** → fill → **Create Attendance**.

Accurate payroll · Accountability · Live staffing view

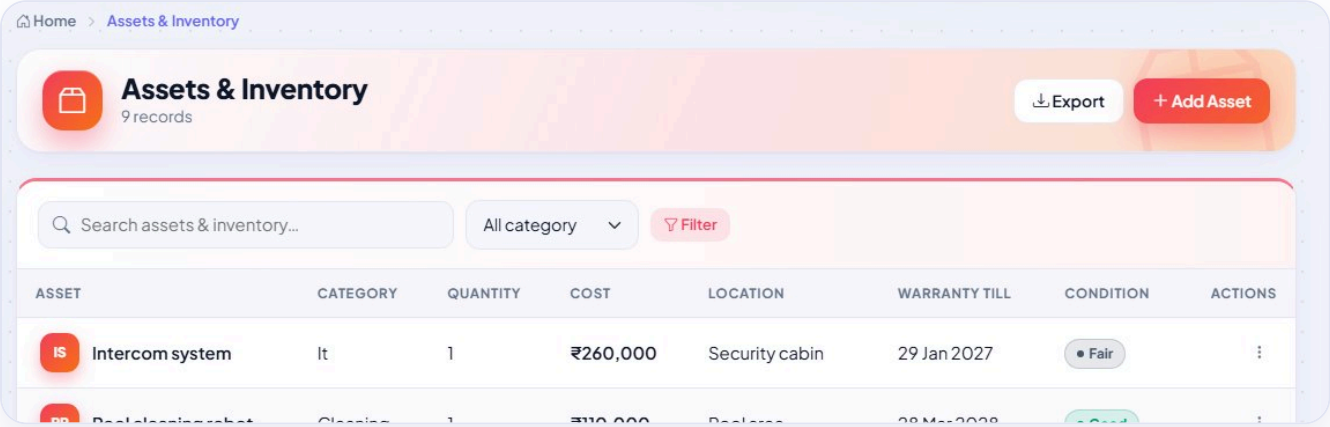
OPERATIONS & ADMINISTRATION

Assets & Inventory

Track everything the society owns.

Website Operations › Assets & Inventory

App Menu › Assets & Inventory



The Assets & Inventory screen on the website.

What it is for

Log generators, CCTV, pumps, gym equipment and furniture with cost, location, condition and warranty dates — so repairs and replacements are never a surprise.

Asset register
Name, category, quantity and cost.

Locations
Know where everything is kept.

Condition tracking
Good, fair or poor.

Warranty dates
Claim before warranties lapse.

Purchase history
Dates and values for audits.

Accountant access
Update inventory as it changes.

Who can do what

ROLE	PERMISSIONS
Society Admin	view, add, edit, delete Maintain the full asset register.
Accountant	view, add, edit Add and update assets and costs.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
Asset	Text	**Yes**	e.g. "Generator", "Clubhouse sofa set".
Category	Choose one	No	Choose one: Electrical, Furniture, Sports, Safety, Garden, It, Cleaning, Other
Quantity	Number	No	How many you own.
Cost	Amount (₹)	No	Enter the amount in rupees.
Location	Text	No	Type the text.
Purchased	Date	No	Pick a date.
Warranty Till	Date	No	Warranty end date.
Condition	Choose one	No	Good, fair or poor. Choose one: Good, Fair, Poor

Add a asset — the basics

ON THE WEBSITE

1. Open **Operations** in the sidebar and click **Assets & Inventory**.
2. Click **+ Add Asset** at the top right. A panel slides in.
3. Fill the required fields (Asset).
4. Check for red messages; each green tick means the field is fine.
5. Press **Create Asset**. A message confirms and it appears in the list.

IN THE ANDROID APP

1. Open **Menu** and tap **Assets & Inventory** (or use the bottom bar or a Quick action if it is there).
2. Tap **+ Add Asset** at the bottom right.
3. Fill the required fields (Asset).
4. Red text under a box tells you what to correct.
5. Tap **Create Asset**.

Who can add assets & inventory?
Society Admin, Accountant.

Edit or delete: on the website open the ⋮ menu of a row and choose **Edit** or **Delete**. In the app open the record and tap the **pencil** or **bin**.

Add an asset Admin / Accountant

ON THE WEBSITE

1. Open **Operations** → **Assets & Inventory** → **+ Add Asset**.
2. Enter name, category, quantity, cost, location, purchase and warranty dates. Save.

IN THE ANDROID APP

1. Menu → Assets & Inventory → **Add Asset**.

Audit-ready inventory
Warranty savings
Better planning

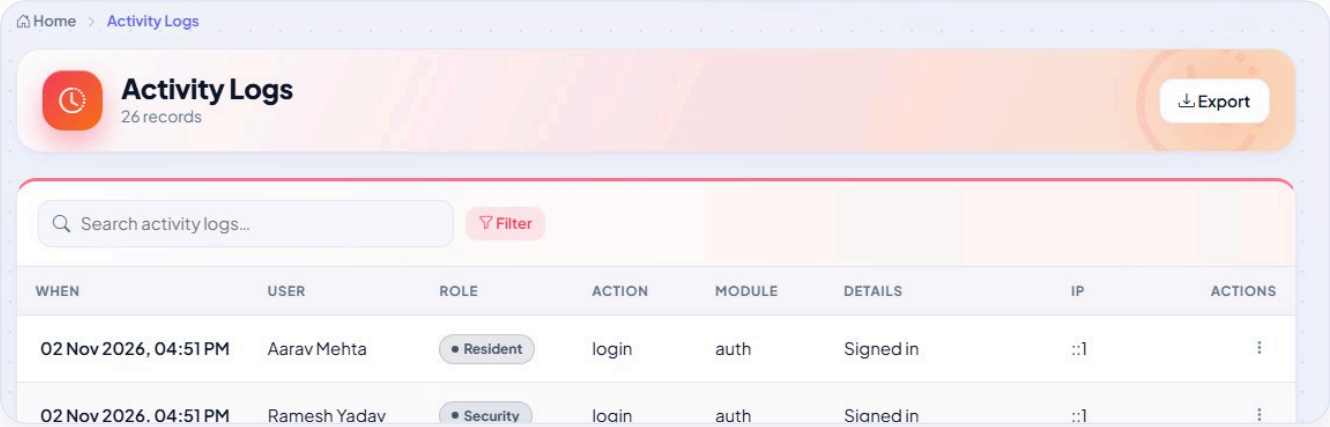
OPERATIONS & ADMINISTRATION

Activity Logs

Every action, who did it and when.

Website Administration › Activity Logs

App Menu › Activity Logs



The Activity Logs screen on the website.

What it is for

A read-only trail of who did what and when: sign-ins, new records, changes, payments and exports. Use it to settle "who changed this?" questions.

Complete trail
Created, updated, deleted, exported, paid.

User & role
See who performed each action.

IP address
Add security context.

Searchable
Filter by user, module or action.

Society isolated
Admins see only their society's logs.

Dashboard timeline
Recent activity at a glance.

Who can do what

ROLE	PERMISSIONS
Society Admin	view Review all activity in the society.

Fields explained

FIELD	TYPE	REQUIRED	WHAT TO ENTER
When	Date & time	No	Date and time of the action.
User	Text	No	Who did it.
Role	Choose one	No	Choose one: Super Admin, Admin, Accountant, Security, Resident
Action	Text	No	Created, updated, deleted, payment, login…
Module	Text	No	The area it happened in.
Details	Text	No	A short description of the change.
IP	Text	No	Type the text.

Find out who changed something

Admin

ON THE WEBSITE

1. Open **Administration** → **Activity Logs**.
2. Use the search box to look for a name, module or action.

IN THE ANDROID APP

1. Menu → Activity Logs → use the search bar.

Accountability · Dispute resolution · Stronger security

OPERATIONS & ADMINISTRATION

Society settings

Admins control how the society works from **Administration → Society Settings**.

SETTING	WHAT IT DOES
Society name, address, city, contact phone and email	Printed on bills and receipts.
Late fee (% of bill)	Percentage added when you press **Apply late fees** on overdue bills. Default 2%.
Bill due day of month	The default due date when you generate bills. Default 10.
Society UPI ID	Shown to residents on the Pay screen. They use it to pay you from any UPI app. **Set this before you ask residents to pay online.**
Bank account details	Shown on invoices for payment by bank transfer.
Auto-approve pre-approved visitors	When on, guests that residents pre-approved are allowed through without a second approval.
Footer note on bills	A line printed at the bottom of every bill.

ON THE WEBSITE

1. Open **Administration → Society Settings**.
2. Change the values and press **Save settings**.

IN THE ANDROID APP

1. Menu → **Society Settings**, change the values and tap **Save settings**.

OPERATIONS & ADMINISTRATION

Support and platform updates

If something is not working or you need help from the Socivio team, raise a ticket. Admins can also read updates the platform has published.

ON THE WEBSITE

1. Open **Administration** → **Contact Support** and click **+ Add Ticket**.
2. Enter a **Subject**, describe the issue and choose a priority.
3. Click **Create Ticket**. The team's reply appears on the ticket under **Support Reply**.
4. Open **Platform Updates** to read announcements.

IN THE ANDROID APP

1. Menu → **Contact Support** → **Add Ticket**.
2. Fill in the subject and description, then tap **Create Ticket**.

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PART 7

Dashboards & Reports

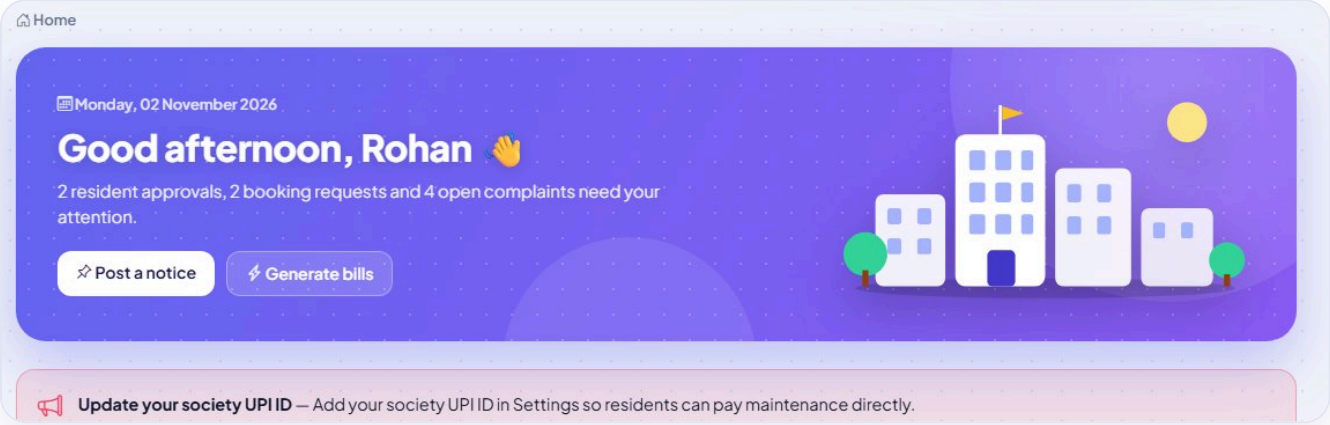
The summary screens that tell each role how things stand.

- Dashboard
- Reports and analytics

DASHBOARDS & REPORTS

Dashboard

The dashboard is the first screen after you sign in. It is different for every role so you only see what you need.



Cards, charts and latest activity on the dashboard.

ROLE	WHAT THE CARDS SHOW
Resident	Outstanding dues, next due date, amount paid this year, visitors expected, upcoming bookings, and your flat's latest bills and notices.
Admin	Flats, occupied flats, residents, pending approvals, amount collected and expenses this month, outstanding dues, open complaints, visitors today, active SOS, pending bookings and move requests, plus income-versus-expense and visitors charts.
Accountant	Billed this month, collected, expenses, outstanding, collection efficiency, overdue bills and latest payments.
Security	Visitors inside, expected visitors, people waiting at the gate, parcels pending, staff present and today's visitors.

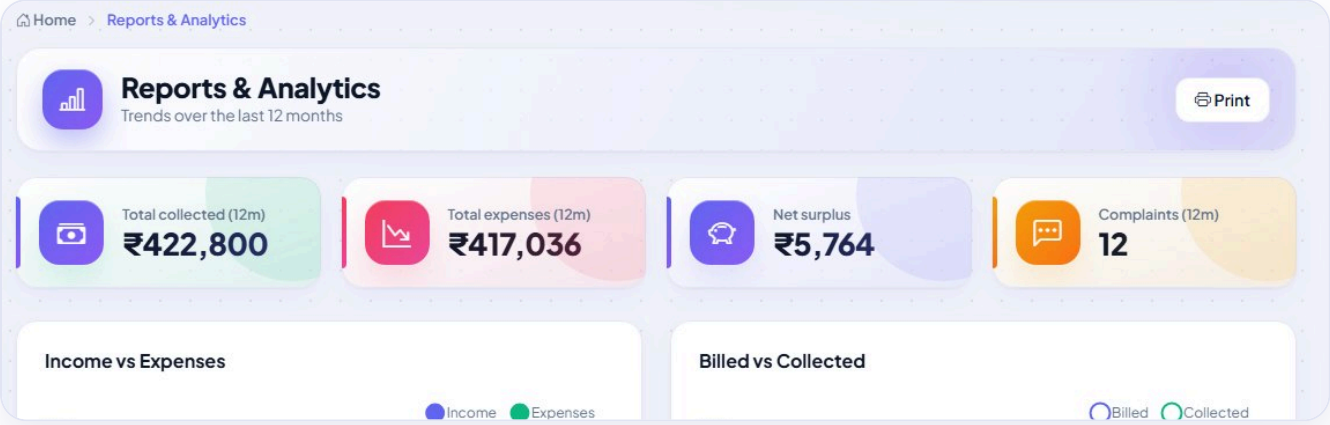
Pull to refresh

In the app pull the dashboard down to reload all figures. On the website press the browser refresh.

DASHBOARDS & REPORTS

Reports and analytics

Reports turn your records into charts for the last 12 months: income against expenses, billed versus collected, complaints by category and more. Admins and accountants can open them.



Twelve-month trends with summary cards.

ON THE WEBSITE

1. Open **Overview** → **Reports & Analytics**.
2. Read the summary cards at the top and scroll to the charts.
3. Hover a bar for exact figures.

IN THE ANDROID APP

1. Menu → **Reports & Analytics**.
2. Swipe through the summary cards and charts.

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PART 8

The platform owner

For the Super Admin who looks after every society on Socivio.

> For the platform owner (Super Admin)

THE PLATFORM OWNER

For the platform owner (Super Admin)

The Super Admin looks after all societies on the platform. This area is visible only to that role.

SCREEN	WHAT YOU DO THERE
Societies	Onboard a society: name, city, plan, status and trial end date. When you add one you also create its first admin (name, email, password); a default block and a welcome notice are created for you.
Subscription Plans	Define plans: monthly and yearly price and limits. Choose a plan for every society.
Society Admins	Create or deactivate the admin login of a society.
Subscription Payments	Record the subscription money a society has paid: amount, period, method, transaction ID, date and status.
Website Enquiries	Messages sent through the website contact form. Mark them as handled.
Support Tickets	Tickets raised by society admins. Write your **Support Reply** and update the status.
Platform Announcements	Messages shown to all society admins (info, urgent or success).
Activity Logs	A trail of actions across the whole platform.
Platform Settings	Platform name, support email and phone, free-trial length, whether residents may register themselves, and a global banner message.

ON THE WEBSITE

1. Open **Platform** → **Societies** and click **+ Add Society**.
2. Fill in the society details, choose a plan and set the status.
3. Enter the admin's **name**, **email** and **password**.
4. Click **Create Society** and send the login to the admin.

IN THE ANDROID APP

1. The Super Admin sees the same screens in the app under **Menu** → **Platform**.
2. Tap **Add Society**, fill the form and tap **Create Society**.

Trial period

A new society gets a free trial (30 days by default, changeable in Platform Settings). Set the status to Active when they subscribe.

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PART 9

Playbooks

Ready-made routines: the first week for an admin, the monthly billing cycle and daily checklists for residents, guards and accountants.

- First week for a new admin
- The monthly billing cycle
- A resident's daily life
- A guard's gate shift
- Accountant's month-end checklist

PLAYBOOKS

First week for a new admin

Follow this order and your society is fully running in about a week.

DAY	DO THIS	WHERE
1	Sign in, change your password, set the society name, contact details and **UPI ID**.	Profile · Society Settings
1	Create blocks / wings, then add every flat with its monthly maintenance.	Blocks / Wings · Flats / Units
2	Invite your **accountant** and **guards** by adding them as team members.	Team & Roles
2	Add or import residents and link them to flats, or ask them to register and approve them.	Residents
3	Add parking slots and assign them to flats; residents add their own vehicles.	Parking Slots · Vehicles
3	Publish a welcome notice and the society rules.	Notice Board · Society Rules
4	Add emergency contacts, amenities with fees and opening hours, and the committee.	Emergency Contacts · Amenities · Committee
5	Generate the first month's bills and tell residents to install the app.	Maintenance Bills · Installing the app
6–7	Upload documents (bylaws, forms), add vendors and AMC contracts, record the first expenses.	Documents · Vendors · AMC · Expenses

Tell residents

Send a notice with the website address and the app download link. The faster residents join, the faster notices, visitors and payments become paperless.

PLAYBOOKS

The monthly billing cycle

A simple routine for the admin or accountant every month.

WHEN	STEP	HOW
1st	**Generate bills**	Maintenance Bills → Generate bills → month, title, basis, due date.
1st–10th	Residents pay and report	Residents pay by UPI and submit the reference (UTR) in Socivio.
Daily	**Verify payments**	Payments & Receipts → Pending → compare the UTR with your bank statement → Approve or Reject.
Around the 7th	**Send reminders**	Maintenance Bills → Send reminders (everyone with dues).
After the due date	**Apply late fees**	Maintenance Bills → Apply late fees.
Month end	Review	Reports & Analytics: billed vs collected, outstanding dues, expenses.

Never approve without seeing the money
Approving issues an official receipt and marks the bill paid. Always match the reference number and amount in the bank first.

PLAYBOOKS

A resident's daily life

I WANT TO…	DO THIS
Pay my maintenance	Bills → **Pay Now** → pay by UPI → enter the UTR → Submit. Wait for approval.
Let a guest in without a call	Visitors → Add Visitor → share the 6-digit passcode.
Report a leak or a broken light	Helpdesk → Add Complaint → add photos.
Reserve the clubhouse	Amenity Bookings → Add Booking → pick date and time.
Sell my old sofa	Marketplace → Add Listing → add up to 8 photos.
Register my car	Vehicles → Add Vehicle.
Register my maid	Domestic Help → Add Helper.
Call for help	SOS Alerts → Add Alert.
Vote on a decision	Polls & Voting → tap an option.

PLAYBOOKS

A guard's gate shift

MOMENT	WHAT TO DO
Guest arrives	Search the visitor list for the name or passcode. If the guest is **Approved** or **Expected**, press **Check In**.
Guest not on the list	Add a new visitor with the flat number and set the status to **Waiting**. The flat is notified; wait for **Allow** or **Deny**.
Guest leaves	Press **Check Out**.
Parcel arrives	Parcels & Deliveries → Add Parcel → choose the flat. Press **Mark Collected** when handed over.
Alert received	Open the SOS notification, press **Acknowledge** and go to the flat. Press **Resolve** afterwards.
Helper at the gate	Check the Domestic Help list: only **Verified** helpers with a gate pass may enter; **Blocked** people must be refused.

PLAYBOOKS

Accountant's month-end checklist

1. Open **Payments & Receipts**, filter **Pending** and verify or reject every reported payment.
2. Record any **cash or cheque** payments received at the office with Pay Now.
3. Open **Maintenance Bills**, filter **Overdue** and **Send reminders**.
4. Press **Apply late fees** once the due date has passed.
5. Enter every **expense** of the month with the vendor bill attached.
6. Add or update **AMC contracts** that are about to expire.
7. Open **Reports & Analytics**, check billed versus collected and the expense chart.
8. Use **Export** on Bills, Payments and Expenses to save CSV copies for the audit.

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PART 10

Help

Answers to common problems and a one-page quick reference.

> Troubleshooting and FAQ

> Quick reference

HELP

Troubleshooting and FAQ

PROBLEM	WHAT TO DO
I cannot sign in	Check the email spelling. If you just registered, the admin must approve you first. Ask the admin to check that your status is Active.
"Enter a valid email" or other red messages	Read the message under the box; fix it and the box turns green. The form will not submit until all red messages are gone.
I paid but my bill is still unpaid	Payments are confirmed by the admin after they see the money. Make sure you submitted the UTR. You will get a notification when it is approved.
The Pay screen has no "Open UPI app" button	The admin has not saved the society UPI ID yet. Ask them to add it in Society Settings, or pay using the details they give you.
I get no notifications on my phone	Allow notifications for Socivio in Android Settings, sign in again, and keep the app installed. Notifications stop when you sign out.
The app says I am offline	Check mobile data or Wi-Fi. The app reconnects by itself; tap the retry button if it shows one.
A list is empty	Clear the search and filters. Residents only see their own records in some areas.
Photo was not added	Pictures must be JPG, PNG, GIF or WebP, up to 5 MB each, and no more than 8 per record.
I cannot see a menu item	Menus depend on your role. Ask the admin if you should have access.
The app asks me to update	Tap **Update now**, download the new file from the website and install it over the old one.
I deleted something by mistake	Deleted records cannot be restored. The Activity Logs show who deleted it; add the record again.

Still stuck?
Admins can raise a ticket under **Administration → Contact Support**. Residents should contact their society office.

HELP

Quick reference

Where do I find…

TASK	WEBSITE PATH	APP PATH
Pay a bill	Finance → Maintenance Bills	Home → Pay bills
Verify a payment	Finance → Payments & Receipts	Menu → Payments & Receipts
Generate bills	Maintenance Bills → Generate bills	Maintenance Bills → Billing tools
Pre-approve a visitor	Gate & Services → Visitors	Home → Pre-approve
Raise a complaint	Gate & Services → Helpdesk	Home → Complaint
Book the clubhouse	Amenities → Book Now	Menu → Amenity Bookings
Post a listing	Community → Marketplace	Home → Market
Publish a notice	Community → Notice Board	Home → New notice
Create an event	Community → Events	Menu → Events
Change my password	Top bar → My profile	Menu → your name
See notifications	Bell in the top bar	Bell on any screen

Photo limits

Up to **8 photos** per record · **5 MB** each · JPG, PNG, GIF or WebP. Documents accept PDF, Word, Excel, CSV, text, ZIP and images up to 5 MB.

Thank you for using Socivio

One society. One app. Everything in sync.

socivio.in

1. Getting started 2. People & Property 3. Community 4. Gate & Services 5. Finance
6. Operations & Administration 7. Dashboards & Reports 8. The platform owner 9. Playbooks
10. Help

This guide describes the Socivio website and Android app. Screens may look slightly different as the product improves.