DATA ENTRY TRAINING

Arch Travel CRM

Module 19 — Administration & System Setup

Roles and permissions, company profile, users, two-step login, audit log, site tools and data import.

TRAINING GUIDE · SIMPLE ENGLISH

ROLES COMPANY USERS TWO-STEP AUDIT LOG SITE MONITOR DATA IMPORT ERRORS CHECKLIST

For trained staff and customers

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How to use this guide

This guide teaches you to enter data in the **Administration & System Setup** module of Arch Travel CRM. Follow the parts in order the first time. Later, use Section 4 (field tables) and Section 7 (checklist) as a quick reference.

Field names

Names written like `Customer:` are shown exactly as they appear on the screen.

Buttons and menus

Names written like **Save** are buttons or menu items you click.

Required

In the field tables: **Yes** you must fill it **No** optional **Auto** the system fills it.

Messages

Text in *italics* is a message the system shows. ... stands for a name or number.

TIP
Practise with demo data first. Use the checklist in Section 7 before you finalise anything.

WARNING
Never share your password. Sign out when you leave your desk.

NOTE
Your menu shows only the screens your administrator has given you. If a menu item is missing, ask your administrator.

SECTION 1

1 Module introduction and menu path

Administration is for the system administrator. Here you decide who can open which screen, keep the company profile used on printouts, watch the audit log, and run special tools such as data import. Most screens are under **Admin** in the CRM; company and user records are in the **Admin Backend**.

MENU PATH

Admin top menu → **CRM & Customers** menu group → **Roles & Permissions** and Audit Log

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → CRM & Customers	Roles & Permissions · Audit Log · Audit Log Settings · Activity Feed · Online Users · Site Monitor
Admin → System Functions	Data Import · Delete Actions · Data Wipe (select modules) · Wipe All Transactions
Your user menu	Change password, Two-step verification
Admin Backend → System	Company · Branch · Departments · Positions · Users · Roles · Sys Settings

HOW THE WORK FLOWS

Company and branches Profile and logos → **Roles** Screens and rights → **Users** Employee logins → **Monitor** Audit log and site monitor

⚠ **WARNING**
Delete Actions, Data Wipe and Wipe All Transactions remove data permanently. Use them only with written approval and after a backup.

SECTION 2

2 Prerequisites: set up these first

Make sure the items below exist before you start. Ask your administrator if one is missing.

SET UP THIS FIRST	WHERE	WHY IT IS NEEDED
Administrator login	Given at installation	Only administrators see these screens.
Branches, Departments, Positions	Admin Backend → System	Needed for employees and users.
Employees	HR → Employees, or Admin Backend → HR Management → Employee	A staff login is linked to an employee record (**User Name**).
Authenticator app	Google Authenticator or similar on your phone	For two-step verification and for Data Wipe.

SECTION 3

3 Step-by-step data entry

Follow the parts in order. Each part matches one screen or task.

Part A — Create a role and give permissions

Open **Admin → Roles & Permissions**. The page title is **Security Roles & Permissions**.

Roles & Permissions

1 Create New Role
Click **Create New Role**. Type the **Role Name** *(for example* Ticketing Manager *or* Accounts Officer*).

2 Administrator options
Tick **Is Administrative (Full Admin Privileges)** only for full administrators. **Can Edit Application Model** is for the system owner.

> ⚠ **WARNING**
> A full administrator can see and change everything.

3 Create Role
Click **Create Role**. The role appears in the list; use **Search roles…** to find it.

4 Frontend Menus & Pages
Open the tab **Frontend Menus & Pages**. Tick the menu items and pages this role may open. Use **Expand**, **Select All** and **Clear**.

5 Backend XAF Security (CRUD)
Open **Backend XAF Security (CRUD)**. Give **Read** or **Full** per entity, or use **Auto-Sync from Frontend**, **All Full CRUD** or **Read-Only All**.

6 Customers & Users
Open **Customers & Users** to add users or portal customers to this role. Search by name, tick and use **Select shown**.

7 Save Changes
Click **Save Changes**. Message: *Role & backend XAF security saved successfully!*

> ⓘ **NOTE**
> *The primary Administrators role cannot be deleted.*

Part B — Company profile (Admin Backend)

Open the Admin Backend, menu **System → Company**. These details print on vouchers, invoices and reports.

Company

1. **Name and address**
   Fill `Company Name`, `Tag Line`, `Company Address 1`, `Company Address 2` and `Company City`.

2. **Contact**
   Fill Company Phone 1, `Company Phone 2`, Company Email and Company Website.

3. **Legal and tax**
   Fill `License No`, `Tax Number`, `VAT No` and `Tax Rate` (0 to 100).

4. **Financial period**
   Set `Financial Period Start` and `Financial Period End`.

5. **Logos and texts**
   Set `Report Logo`, `Company Logo BW`, `Terms and Conditions` and `Bank Details`.

6. **Business rules**
   Options such as `Allow Duplicate Passport No`, `Nightwise Rate`, `PKR On Invoice`, `Allow Duplicate Ticket` change how the system works. Change them only when told to.

7. **Save**
   Click **Save**.

Part C — Users and logins

Staff users

1. **Employee record**
   Staff logins come from the employee record. Open **HR → Employees** (or Admin Backend → HR Management → Employee) and fill `User Name`.

2. **Roles**
   Give the user a role in **Roles & Permissions → Customers & Users**, or in Admin Backend → System → Users / Roles.

3 **First login**

The user signs in and changes the password on **Change your password**: Current password, New password, Confirm new password, Change password.

Two-step verification (each user)

1 **Open the page**

Open **Two-step verification** from your user menu.

2 **Scan the key**

Scan the QR code with your authenticator app. If you cannot scan, use Can't scan? Enter this key manually.

3 **Enter the code**

Type the 6-digit Code from the app and click Turn on.

4 **Recovery codes**

Copy or print the recovery codes and click **I saved them — continue**.

> TIP
> Keep recovery codes in a safe place. Each code works once.

Part D — Audit log, settings and monitoring

Audit Log

1. **Search**
   Open **Admin → Audit Log**. Type a number or name in `Transaction / Record` (invoice, voucher or booking no., customer, passport, PNR or #ID), or choose a `User`.

2. **Filters**
   Set `From`, `To`, `Module` and `Activity` (Created, Changed, Deleted, Button actions, Screen opens, Login / Logout).

3. **Search and export**
   Click `Search`. Use `Excel` or `Print` to export.

Audit Log Settings

1. **Global**
   Tick `Enable Audit Logs`.

2. **Actions**
   Tick what to log: `Created`, `Changed`, `Deleted`, `Linked / Unlinked`, `Login`, `Login Failed`, `Logout`, `Screen Opened`, `Buttons / Actions`.

3. **Per module and excluded fields**
   Turn modules on or off. Add fields that should not be logged with `Add field`.

4. **Retention**
   Set `Retention days (blank = keep forever)`. Click `Save Settings`.

Site Monitor and Online Users

1. **Broadcast banner**
   In **Site Monitor**, type a `Message *`, choose `Type` (Info or Warning) and `Show for`, then click `Show to everyone`.

2. **Online Users**
   See who is signed in. Click `End session` to sign a user out.

Part E — Data Import and delete tools

Data Import

1 Choose data
Open **Admin → Data Import**. Choose the type in `Data`.

2 Sample and file
Click `Download Sample`, fill it, then choose it in `CSV File`.

3 Validate
Click `Validate`. Tick `Show only rows with errors / warnings` to see problems.

4 Import
Click `Import Data`. Use `Export Results` to keep a copy of the result.

Delete Actions (one record)

1 Find
Type a `Booking Number`, `Reservation / Booking Number`, `Passport Number` or `Voucher Number` and click `Find`.

2 Delete
Check the record and click `Delete`.

> ⚠ **WARNING**
> Deleting cannot be undone. Some records show *Cannot delete* when they are linked to other data.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Roles & Permissions — Create New Role

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Role Name *	Unique role name.	Yes
Is Administrative (Full Admin Privileges)	Full administrator.	No
Can Edit Application Model	System owner only.	No

Company (Admin Backend)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Company Name	Your company name.	Yes
Company Address 1	Main address.	Yes
Company City	City.	Yes
Company Phone 1	Main phone.	Yes
Company Email	Main e-mail.	Yes
Tag Line / Company Address 2 / Company Phone 2 / Company Website	Optional fields.	No
Tax Rate	0 to 100.	No
Financial Period Start / Financial Period End	Start must be on or before end.	No
Report Logo / Company Logo BW	Logos for printouts.	No
Terms and Conditions / Bank Details	Text on printouts.	No

Change your password

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Current password	Your present password.	Yes
New password	New password.	Yes
Confirm new password	Same again.	Yes

Audit Log

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Transaction / Record	Number, name or #ID (2+ characters), or choose a user.	Yes
From / To	DD/MM/YYYY.	No
User / Module / Activity	Filters.	No

Audit Log Settings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Enable Audit Logs	Master switch.	No
Created / Changed / Deleted / Login / Logout / Screen Opened / Buttons / Actions	What to log.	No
Retention days (blank = keep forever)	Number of days.	No

Site Monitor — Broadcast banner

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Message *	Text shown to all users.	Yes
Type	Info (blue) or Warning (amber).	No
Show for	e.g. 4 hours or Until cleared.	No

Data Import

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Data	Type of data.	Yes
CSV File	Filled sample file.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Change a role	Open Roles & Permissions, pick the role on the left, change ticks, **Save Changes**.
Delete a role	Use **Delete Role** on the role and confirm.
See who changed a record	Audit Log: search the record number.
Recent activity	**Activity Feed** shows the latest events; **Full Audit Log** opens the audit log.

SECTION 6

6 Common errors and how to fix them

The messages below are the real messages the system shows. ... stands for a name or number.

Roles

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter a role name.	Type the **Role Name *** .
A role with this name already exists.	Choose another name.
The primary Administrators role cannot be deleted.	Keep this role.
Access denied.	Only administrators can open this page.

Company

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Company Name is required.	Fill **Company Name** .
Company Address 1 is required.	Fill the address.
Company City is required.	Fill the city.
Company Phone 1 is required.	Fill the phone.
Company Email is required.	Fill the e-mail.
Tax Rate must be between 0 and 100.	Correct the tax rate.
Financial Period Start must be on or before Financial Period End.	Fix the dates.

Audit, monitor and tools

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
You do not have permission to view audit logs.	Ask for the right.
Enter a transaction number, record name or #ID (at least 2 characters), or choose a user.	Type more, or pick a user.
You do not have permission to change audit log settings.	Ask an administrator.
Please enter a message.	Type the banner message.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter the number to find.	Type a number in Delete Actions.
Choose the data to import.	Pick **Data**.
Choose a CSV file to import.	Pick the file.
The file is too large. Split it into smaller files.	Split the CSV.
Enter a valid current code from your authenticator app (or an unused recovery code).	Type the current 6-digit code.

SECTION 7

7 Quick checklist

Setup

- [ ] Company profile complete
- [ ] Branches, departments, positions exist
- [ ] Logos uploaded

Security

- [ ] Every admin uses two-step verification
- [ ] Recovery codes saved
- [ ] Audit logs enabled

Roles

- [ ] One role per job
- [ ] Only needed pages ticked
- [ ] Backend rights match
- [ ] Users added to role

Danger tools

- [ ] Written approval
- [ ] Backup taken
- [ ] Right record checked before delete

Trainee name _____ Date _____ Trainer _____