DATA ENTRY TRAINING

Arch Travel CRM

Complete Training Manual — 19 modules

Step-by-step data entry for every module: Umrah, hotels, transport, tickets, accounts, HR, overseas, customers, website, mobile app and administration.

TRAINING MANUAL · SIMPLE ENGLISH

UMRAH | HOTELS & TRANSPORT | TICKETS & SERVICES | ACCOUNTS, HR & OVERSEAS | CUSTOMERS, CHANNELS & ADMIN

For trained staff and customers

Contents

Each module is a complete guide with the same seven sections: introduction and menu path, prerequisites, step-by-step data entry, field tables, after you save, common errors, and a checklist. Use the PDF bookmarks to jump to a module.

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Dashboards are not in this manual. They only show figures with date filters (From, To, Apply, Excel) and have no data entry. Page numbers inside each module restart at 1 (Page X of Y); the numbers above are pages in this complete file.

DATA ENTRY TRAINING

Arch Travel CRM

Module 1 — Umrah Booking

Step-by-step guide to entering an Umrah booking: mutamers, voucher, pricing, approval and printing.

TRAINING GUIDE · SIMPLE ENGLISH

PREREQUISITES BOOKING MUTAMERS VOUCHER PRICING APPROVAL PRINT ERRORS CHECKLIST

For trained staff and customers

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How to use this guide

This guide teaches you to enter an **Umrah Booking** in 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 **Add Mutamers** are buttons or menu items you click.

Required

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

TIP
Practise with a demo customer first. Use the checklist in Section 7 before you approve a booking.

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.

What you need before you start

- A login name and password from your administrator.
- The customer (agent) name, passport details of every mutamer, and the package name.
- Hotel names, dates and flight details if you will also create the voucher.

SECTION 1

1 Module introduction and menu path

Umrah Booking is where you record a group of pilgrims (mutamers) for one customer and one package. From the booking you create the voucher (hotels, flights, transport), check the price, approve it, and print the voucher and invoice.

MENU PATH

Umrah top menu → **Booking** menu group → **New Umrah Booking** or New Quick Booking, or Umrah Booking List

In the top menu open **Umrah**. You will use these items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Booking	Umrah Booking List · New Umrah Booking · New Quick Booking
Booking Import	Import Booking · Nusuk Import to Booking · Import PAX into Booking
Booking Updates	Update IATA · Update Visa (not covered in detail here)
Voucher	Umrah Voucher List · New Umrah Voucher

THE FOUR STAGES OF AN UMRAH BOOKING

1 Booking — New Umrah Booking: customer, package and mutamers → **2 Voucher** — Hotels, flights and transport. Save as Draft or Approved → **3 Accounts Update** — Check prices. Custom rate rule. Discounts. Status → **4 Print** — Voucher and Invoice (Sale)

Three different statuses: do not mix them up

WHERE YOU SEE IT	FIELD	CHOICES	WHAT IT DOES
New Umrah Booking and Accounts Update	Booking Status:	Draft, Final, Void	Describes the booking. It does **not** post to the ledger by itself.
Voucher screen	Save Mode:	Draft, Approved	**Draft** = not posted. **Approved** = posted to the ledger.
Accounts Update	Voucher Status:	Pending, Draft, Approved, Void	**Pending** = no voucher yet. Only an approved voucher is posted.

⚠ **WARNING**
A booking is posted to the ledger **only when the voucher is Approved**. A Draft voucher is not posted, and KSA is not notified for arrival intimation.

SECTION 2

2 Prerequisites: set up these first

Ask your administrator to confirm that the items below exist. If one is missing, you may get a message such as *Please select a Customer* or the booking may show a zero amount.

SET UP THIS FIRST	WHERE (ADMIN BACKEND MENU)	WHY IT IS NEEDED
Customer (agent)	Contacts → Customers	Required on every booking. The customer must be active. A blocked customer cannot be saved.
SPO (sales person)	HR Management → Employee	Optional. Pick from active employees.
Package	Umrah → Setup → Package	Needed for Quick Booking and imports. Also needed to find hotel, visa and transport rates.
Category	Umrah → Setup → Category	Optional. Used when matching visa rates.
IATA and **Visa Company**	Contacts → IATA (link a Visa Company)	Optional. Choosing IATA fills **Visa Company:** on the booking.
Visa Status list	Umrah → Setup → Visa Status	Fills the **VISA Status:** list. A status named *Booking Created* is picked for you if it exists.
Visa Rates and **Visa Cost**	Umrah → Setup → Visa Rates, Visa Cost	Price of the visa per mutamer. No rate = price 0 and the booking is not posted.
Hotels, **Hotel Rates**, **Hotel Cost**	Umrah → Setup → Hotels, Hotel Rates, Hotel Cost	Hotel list for the voucher and the hotel price per night.
Transporters, **Transport Routes**, **Transport Types**, **Transport Rates**	Contacts → Transporters; Umrah → Setup → Transport Routes, Transport Types; Transports → Setup → Transport Rates	Needed for the Transport Details on the voucher.
Airlines and **Sectors**	Contacts → Airlines; Umrah → Setup → Sectors	Used in Flight Details on the voucher.
SAR Rates	Accounts → Setup → SAR Rates	Exchange rate for PKR and SAR. If none is found, rate 1 is used.
Chart of Accounts and **Financial Settings**	Accounts → Account List; Accounts → Setup → Financial Settings	Sale, cost and payable accounts used for posting. Missing account: *No account found for ….*
Your rights	System → Users, System → Roles; HR Management → Employee	Access to the Umrah screens. To save as Final or Approved you also need the *allow final* rights on your employee record.

> **TIP**
> Customer rules to know: **Blocked**, **Advance Required For Voucher** and **Credit Limit**. These can stop an approval (see Section 6).

SECTION 3

3 Step-by-step: create an Umrah booking

Follow Parts A to H in order. Parts A, B and D are the minimum to create a booking. Parts E to H complete the work.

Before you start: sign in

Login page

1 Enter your username
Type your user name in the box under USERNAME.

2 Enter your password
Type your password under PASSWORD. Click the eye to check what you typed.

> ⚠ **WARNING**
> Do not tick **Keep me signed in** on a shared computer.

3 Click Log In
Click Log In. If two-factor login is on, enter the code from Google Authenticator when asked.

Part A — Booking Information

Open **Umrah → Booking → New Umrah Booking**. The page title is **Umrah Booking**. Fill the **Booking Information** card from top to bottom.

New Umrah Booking — Booking Information

1 Booking Number
Leave it **empty**. The system gives the next number when you save. After saving, this box is read-only.

> 💡 **TIP**
> Type a number only if your office has a rule for manual numbers. A duplicate gives *Booking Number ... already exists.*

2 Booking Date
Today's date is filled in. Change it only if the booking belongs to another date.

3 Customer
Click the box and choose the customer (agent). You can type to search. **Required.**

4 SPO
Choose the sales person. Optional.

5 Package
Choose the package. Optional on this screen but needed for correct prices.

6 Category
Choose the category if your package uses one. Optional.

7 Approval Date
Date of approval. It is also used to work out who is an Adult, Child or Infant.

8 Booking Status
A new booking starts as **Final**. If you do not have the right to save Final, choose **Draft**.

> ⚠ **WARNING**
> Message if not allowed: *You are not allowed to save bookings as Final; save as Draft.*

9 Confirmed Ticket
Tick if the air ticket is confirmed. Optional.

10 Group No and Group Name
Enter your group number and group name. They are copied to each mutamer.

11 IATA
Choose the IATA. `Visa Company:` fills in by itself and cannot be typed.

12 VISA Status
Choose the visa status. *Booking Created* is pre-selected if it exists in your list.

13 Short Booking and Adults / Childs / Infants
Tick `Short Booking` only if you do not have passport details yet. Then type the number of Adults, Childs and Infants. Without Short Booking these numbers are filled from the mutamers.

> ⓘ **NOTE**
> You must add mutamers, **or** tick Short Booking and enter the numbers.

14 Add Mutamers
Click `Add Mutamers` to open the mutamer panel (Part B).

Part B — Add mutamers (passport scan or typing)

Each mutamer needs at least a **Passport** or a **First Name**, and a **Gender**. Passport numbers cannot repeat in the same booking.

New Umrah Booking — Mutamer Details panel

1 Open the panel

Click **Add Mutamers**. The **Mutamer Details** panel opens and the cursor is in **Scanned Passport Number:**.

2 Scan the passport (optional)

Scan the two code lines at the bottom of the passport (MRZ). The first name, family name, passport number, nationality, date of birth, gender and expiry fill in by themselves.

> **TIP**
> While the code is incomplete you see *Waiting for the full passport code (2 lines)…*. When complete you see *Read passport …*.

3 Title and Family Head

Title: fills from gender. The first mutamer is the **Family Head** automatically. Only one person can be Family Head.

4 First Name and Family Name

Type the names if you did not scan. Capital letters are fine.

5 Gender

Choose Male or Female. **Required.**

6 DOB

Choose the date of birth. A badge shows **Adult**, **Child** or **Infant**.

> **NOTE**
> Under 2 years = Infant. Under 12 years = Child. Otherwise Adult. Age is counted on the Approval Date.

7 Seperate Bed

Adults always get a separate bed (the box is locked). For a Child it is ticked for you; for an Infant it is not.

8 Passport and Expiry Date

Type the passport number in capital letters. When you leave the box the system checks other bookings. If the passport is used elsewhere, **Duplicate** is ticked with *Also in …*. Details from an earlier booking are filled in for you.

> **WARNING**

Check the **Expiry Date** carefully. It is pre-filled and may not be the real expiry.

9 **Group Information**

Approval Date:, Group No: and Group Name: are copied from the booking. Change them only if this person is different.

10 **Passport Scan and Mutamer Photo**

Optional. Choose a picture file: .jpg, .jpeg, .gif or .png, **maximum 1 MB**.

11 **Add**

Click Add. The person is added to the list and the panel stays open for the next one: *Added ... Scan the next passport or click Close.*

12 **Close**

When all are added, click Close to go back to the booking.

13 **Edit or remove**

In **Mutamer Details**, use the blue icon under **Actions** to edit, or the X to remove (you are asked to confirm).

> **NOTE**
> Edit shows the button name **Update** instead of Add.

Part C — Other ways to add mutamers

Use the way that fits your work. All of them create the same kind of booking.

New Quick Booking

1 Open the screen
Menu **Umrah → Booking → New Quick Booking**. Title: **New Quick Booking**.

2 Booking Information
Fill `Booking Number:` (leave empty), `Booking Date:`, `Package:` and `Customer:`. Package and Customer are **required**. `Manual Booking No:` and `Booking Notes:` are optional.

3 Mutamer rows
Click the + icon to add a row. Fill `Passport No`, `Expiry Date`, `First Name`, `Last Name`, `DOB` and `Gender`. Tick `Family Head` for one person.

4 Allow Duplicate
Tick `Allow Duplicate` on a row only when the passport is already in another booking and you really want it again.

5 Manage rows
Use the trash icon to delete selected rows and the arrow icon to discard changes.

6 Save Booking
Click `Save Booking`. You see *Booking No = … created successfully.*

Import Booking (Standard CSV)

1 Download the format
Click `Download Standard Format` and fill the file. Columns: PassportNo, MutamerName, Gender, DOB, Nationality, PAX, Bed, VisaNumber, PNR, PassportExpiry, GroupNo, GroupName.

2 Choose the file
Under `Standard (.csv) File:` choose your .csv or .txt file.

3 Booking settings
Choose `Package:`, `Category:`, `Customer:`, `IATA:`, then `Booking Date:` and `Approval Date:`. Package, Customer and Booking Date are **required**.

4 Custom amounts and hotels (optional)

Tick Custom Sale or Custom Cost to type your own amounts. Choose Hotel 1: to Hotel 3: and Expected Departure Date: if known.

5 Options

Send SMS: and Allow Duplicate: are optional tick boxes.

6 Import Booking

Click Import Booking. Links appear to open the voucher, print it, view the invoice or open the voucher list.

Nusuk Import to Booking

1 Open the screen

Menu **Umrah → Booking Import → Nusuk Import to Booking**.

2 Import Type and File

Choose Import Type: **Nusuk** (Excel from Nusuk) or **Standard**. Choose the File: (.xlsx, .xlsm, .csv or .txt, **maximum 5 MB**). The rows show in the **Work Sheet**.

3 Package and dates

Choose Package: (**required**) and Booking Date: (**required**). Category:, IATA:, Group No., Group Name. and Approval Date: are optional.

4 Sale and Cost Amount

Enter Adult, Child and Infant amounts if you want them. Default is 0.

5 Import Mutamers

Click Import Mutamers. The people appear in the **Status** list.

6 Create the booking

Tick the people in **Status**, choose Customer: and click Create Bookings. Or choose Booking: and click Add PAX to Booking to add them to an existing booking.

> ⚠ **WARNING**
> All selected people must have the same package. Use Remove Selected to remove wrong rows from the list.

Import PAX into Booking

1 Open the screen

Menu **Umrah → Booking Import → Import PAX into Booking**.

2 **File and booking**
Choose **Standard (.csv) File:** (.csv, .txt or .xlsx, maximum 5 MB). Type the booking number in **Add to Booking:**.

3 **Import Booking**
Click **Import Booking**. The people are added to that booking.

Part D — Save the booking

New Umrah Booking — Mutamer Details list and Save

1 **Check the list**
In **Mutamer Details** make sure every person is listed with the correct passport number and date of birth.

2 **Click Save**
Click **Save** at the bottom. The button shows *Saving...* for a moment.

3 **Read the message**
The page reloads with a green message: **Booking ... saved successfully.** The booking number is now fixed. Counts of Adults, Childs and Infants are filled from the mutamers.

TIP
Saving a new booking sets the voucher to **Pending**. In the booking list you will then see **Create Voucher** (Part E).

WARNING
If the booking is **locked** you see *This booking is locked. Unlock it in Accounts Update before editing.* Ask a user with the right to clear the lock.

Part E — Create the voucher (hotels, flights, transport)

The voucher holds the hotels, flights and transport for the booking. Create it from the booking list. The menu item **Umrah → Voucher → New Umrah Voucher** also opens the booking page, where you pick the booking.

Umrah Booking List — search and Action menu

1 Open the list

Menu **Umrah → Booking → Umrah Booking List**. Use the search boxes (for example Booking No, Customer, Booking date from) and click Search.

2 Open the Action menu

On your booking row click Action and choose **Create Voucher**.

New Voucher Mutamers

1 Select mutamers

The page **New Voucher Mutamers** opens with everyone ticked. Untick people who are **not** on this voucher.

2 Create Voucher

Click Create Voucher. You need at least one person ticked.

> ⚠ **WARNING**
> If you untick some people, they are moved to a **new booking** with a new booking number.

Voucher — details, hotels, flights, transport and Save Mode

1 Voucher Detail

Manual/Service No: and Customized Name on Voucher: are optional. Booking No:, Date:, Customer:, Branch:, Package:, IATA: and Visa Company: are shown for checking.

2 Mutamer Details

For each person you can tick Family Head and Bed, and type PNR and Visa Number. Visa Rate shows the price. A red **0.00** means no visa rate was found (hover to see why).

3 Accommodation Details

Tick Self Accommodation if guests arrange their own hotel. Otherwise use **Hotel 1** to **Hotel 6**. Choosing a hotel ticks the row for you.

4 **Hotel row**

Choose the hotel, then **Room Type**, **Sharing Type**, **Qty**, **Checkin** and **Nights**. **Checkout** is calculated (or change Checkout and Nights follow). Set **View Type** and **Meal Plan** if needed. You may add **Hotel Note** and **Confirm No**.

> **NOTE**
> Under each hotel you may see the hotel rate and *Availability … rooms free*. A warning does not stop you from saving.

5 **Flight Details**

Fill the **Departure** and **Return** lines: **Flight**, **No**, **FROM**, **TO**, **Date**, **ETD**, **ETA**. **Travel By:** is Air.

6 **Transport Details**

Tick a line and choose **Transporter**, **Travel Date**, **Transport Route** and **Transport Type**. **Visa with Transport** is YES.

7 **Additional Information**

Tick **Ziarat** for Makkah and/or Madina and enter the date. Add **WhatsApp No:** and **Notes:** if needed.

8 **Save Mode**

Choose **Draft** to keep working, or **Approved** when the voucher is final.

> **WARNING**
> Draft Voucher will not be posted in Account Ledger and KSA will not be notified for arrival intimation.

9 **Save**

Click **Save**. Message: **Voucher … saved as Draft/Approved.** with the accounts result.

Part F — Pricing and the Custom rate rule

Prices come from the rates in your setup (backend). Use **Accounts Update** to check them or to enter your own price.

THE CUSTOM RATE RULE

Custom Sale ticked	→	Custom Sale not ticked
Your typed price is used		The backend (setup) rate is used and replaces what you typed

NOTE
Rule: ticked = manual rate. Unticked = backend rate. If a box is not ticked, anything you type in that rate box is replaced by the backend rate when one exists.

Accounts Update (Booking Approve) — prices, discounts, statuses

1 Open Accounts Update
In the booking list click Action then **Accounts Update**. The page title is **Booking Approve**.

2 Check the mutamers
Each person shows Approval Amount. Type a discount or extra for one person under Mutamer Adjustment. Use Ticket Detail to enter airline, PNR, ticket no and amounts.

3 Services
Click New to add a service: Service *, Provider, Notes, Qty, Rate, Net Total, Net Cost.

4 Visa price: Custom Sale
Ticked = type your own Adult Price:, Childs Price:, Infants Price:. **Not ticked** = the system uses the backend visa rate.

5 Exchange rate: Custom Exchange Rate
Ticked = your Exchange Rate: is used. **Not ticked** = the backend rate is used. The same rule applies to Exchange Rate Hotel:.

6 Hotel and transport prices
In each hotel block tick Custom Room Price to type your own rate. In each transport block tick Custom Transport Price. Not ticked = backend price.

7 Discounts
Enter Approval Discount:, Hotel Discount:, Group Discount: and Booking Adjustments (+/-): if allowed.

8 **Check the totals**

Read **Total Hotel:**, **Total Transport:**, **Total Services:**, **Total Ticket:**, **Gross Sale:**, **Net Charges:**, **Total Payments:** and **Balance:**. These boxes are read-only.

9 **Statuses and locks**

Choose **Booking Status:** and **Voucher Status:**. Tick **Booking Lock**, **Voucher Lock** or **Rate Lock** only when told to.

10 **Update Booking**

Click **Update Booking**. Message: **Booking ... updated.** plus the accounts result.

⚠ **WARNING**

If **Booking Lock** or **Voucher Lock** is ticked, amounts are read-only. Untick the locks and click **Update Booking** first, then change the amounts.

Part G — Status changes and ledger posting

FROM BOOKING TO LEDGER

Booking saved — Voucher Status = Pending → **Voucher saved as Draft** — Not posted → **Voucher saved as Approved** — Ledger posting is created → **Statements** — Customer ledger shows the entry

ACTION	RESULT
Save voucher with Save Mode **Draft**	No ledger entry. KSA is not notified for arrival intimation.
Save voucher with Save Mode **Approved**	The system creates a balanced ledger voucher (reference starts with UB- and the booking number) in SAR.
Change **Voucher Status:** in Accounts Update	Approved posts; Draft or Pending does not (an existing posting is removed when it goes back to Draft).
Booking status Final or Void only	Does **not** post. Only the Voucher Status decides posting.

ⓘ **NOTE**

The system treats the voucher as approved when the status is **Approved** (the older values **Final** and **Confirmed** also count).

If posting does not happen

- *Not posted to accounts: only Approved vouchers are posted (status ...).* — save the voucher as Approved.
- *Not posted to accounts: zero amount (Net Charges 0).* — check package hotel, visa and transport rates.
- *... cannot be approved: customer ... requires an advance payment ...* — record a payment or receipt first.
- *... exceeds the credit limit ...* — ask for the credit limit to be reviewed.

TIP
A user without the right to approve sees *You are not allowed to save hotel vouchers as Approved; save as Draft.* Ask a user with that right to approve it.

Part H — Print the voucher and invoice

Voucher print and Invoice (Sale)

1 Print Voucher
In the booking list click **Action** then **Print Voucher** (shown once a voucher exists). The voucher opens on A4.

2 Print
Click **Print Voucher** at the top, then choose your printer or **Save as PDF**.

3 Share link (optional)
Click **Copy share link** to copy a link that works without signing in. It expires after a set number of days.

4 Print the invoice
Click **Action** then **Invoice (Sale)**. Click **Print Invoice**.

TIP
Your company logo and letterhead on the printouts come from the company profile set up by your administrator.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

S03 New Umrah Booking — Booking Information

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Booking Number:	Leave empty for the next number. Read-only after the first save. Must be unique.	No
Booking Date:	A valid date. Today is pre-filled.	Yes
Customer:	Choose an active customer.	Yes
SPO:	Sales person (active employee).	No
Package:	Active package. Needed for rates.	No
Category:	Active category.	No
Approval Date:	Date used for approval and for Adult/Child/Infant age.	No
Booking Status:	Draft, Final or Void. New booking starts as Final.	Yes
Confirmed Ticket:	Tick if the ticket is confirmed.	No
Group No:	Your group number (starts as 0).	No
Group Name:	Your group name.	No
IATA:	Choose the IATA.	No
Visa Company:	Fills from IATA. Read-only.	Auto
VISA Status:	Choose the visa status.	No
Short Booking	Tick when there are no mutamers yet. Then enter the numbers below.	No
Adults: / Childs: / Infants:	Only open when Short Booking is ticked and no mutamers exist. Otherwise filled from mutamers.	No

S04 Mutamer Details panel (you need Passport or First Name, and Gender)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Scanned Passport Number:	Scan the 2-line passport code. Fills the fields below.	No
Title:	Miss, Mr or Mrs. Fills from gender.	No

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Family Head	Tick for the family head. Only one person.	No
First Name:	Given name. Needed if there is no passport number.	Yes
Family Name:	Surname.	No
Gender:	Male or Female.	Yes
DOB:	Date of birth. Decides Adult, Child or Infant.	No
Seperate Bed:	Locked for adults. Child ticked by default.	No
Passport:	Passport number in capital letters. Needed if there is no first name. Not repeated in the same booking.	Yes
Expiry Date:	Passport expiry. Pre-filled, check it.	No
Duplicate:	Ticked by the system when the passport is in another booking.	Auto
Approval Date: / Group No: / Group Name	Copied from the booking.	No
Passport Scan / Mutamer Photo	Image .jpg .jpeg .gif .png, up to 1 MB.	No

S06 New Quick Booking

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Booking Number: / Booking Date:	Leave number empty. Date is pre-filled.	Yes
Package:	Choose the package.	Yes
Customer:	Choose the customer.	Yes
Manual Booking No: / Booking Notes:	Your own reference and notes.	No
Passport No / Expiry Date / First Name / Last Name / DOB / Gender	One row per person. Each row needs a Passport No or First Name. DOB cannot be in the future.	Yes
Family Head / Allow Duplicate	Tick as needed.	No

S07 Import Booking (Standard CSV)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Standard (.csv) File:	Standard format .csv or .txt.	Yes
Package: / Customer:	Choose both.	Yes
Booking Date:	Valid date.	Yes
Category: / IATA: / Approval Date:	Optional.	No
Custom Sale / Custom Cost + amounts	Tick to type your own Adult, Child and Infant amounts.	No
Hotel 1: ... Hotel 3: / Expected Departure Date:	Optional.	No
Send SMS: / Allow Duplicate:	Tick boxes.	No

S08 Nusuk Import to Booking

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Import Type:	Nusuk or Standard.	Yes
File:	.xlsx .xlsm .csv .txt up to 5 MB.	Yes
Package:	Choose the package.	Yes
Booking Date:	Valid date.	Yes
Category: / IATA: / Group No. / Group Name / Approval Date:	Optional.	No
Sale Amount / Cost Amount (Adult, Child, Infant)	Numbers, default 0. Cannot be negative.	No
Customer: (to create a booking)	Choose before **Create Bookings**.	Yes
Booking: (to add PAX)	Choose before **Add PAX to Booking**.	Yes

S09 Import PAX into Booking

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Standard (.csv) File:	.csv .txt .xlsx up to 5 MB.	Yes
Add to Booking:	Booking number that receives the people.	Yes

S12 Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Manual/Service No:	Your reference.	No
Customized Name on Voucher:	Name printed on the voucher.	No
Family Head / Bed / PNR / Visa Number	Per mutamer.	No
Self Accommodation	Tick when guests arrange their own hotel.	No
Hotel n: (tick) + hotel	When a row is ticked the hotel must be chosen.	Yes
Room Type / Sharing Type / Qty	Qty 0 to 100.	No
Checkin / Nights / Checkout	Checkin and Nights are required for a ticked hotel row. Nights 1 to 300.	Yes
View Type / Meal Plan / Excl Night. / Hotel Note / Confirm NR	Defaults: No View, R/O.	No
Flight, No, FROM, TO, Date, ETD, ETA (Depart. details Return)	Flight details.	No
Transporter / Travel Date / Transport Route / Transport Type	Per transport line.	No
Ziarat Makkah / Madina + Date	Tick and set date.	No
WhatsApp No: / Notes:	Optional text.	No
Save Mode:	Draft or Approved.	Yes

S14 Accounts Update (Booking Approve)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Custom Sale	Ticked = manual price. Unticked = backend rate.	No
Adult Price: / Childs Price: / Infants Price:	Visa price per type.	No
Custom Exchange Rate / Exchange Rate:	Ticked = your rate. Unticked = backend rate.	No
Custom Exchange Rate / Exchange Rate Hotel:	Same rule for hotels.	No
Exclude Ticket	Leaves the ticket out of the total.	No
Approval Discount: / Hotel Discount: / Group Discount:	Amounts, zero or more.	No
Booking Adjustments (+/-):	Plus or minus amount.	No
Custom Room Price / Custom Transport Price	Per hotel or transport block. Ticked = manual.	No
Booking Status: / Voucher Status:	Draft/Final/Void and Pending/Draft/Approved/Void.	Yes
Booking Lock / Voucher Lock / Rate Lock	Locks. Handle with care.	No

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Notes:	Free text.	No
Total Approval Amount:, Total Hotel:, Gross Sale:, Net Charges:, Balance: ...	Calculated. Read only.	Auto

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find a booking	Umrah → Booking → **Umrah Booking List**. Filters: Booking No, Customer, Branch, Booking date from, Booking date to, Booking status, Group No, Group Name, Manual No, Booking type, Records. Click Search. Reset clears the filters.
Find a voucher	Umrah → Voucher → **Umrah Voucher List**. Filters include Voucher No, Customer, Voucher status, Group Name, Family Head, Package, Visa Company, Makkah Hotel, Madinah Hotel, dates.
Columns in the booking list	Booking No, Booking Date, Booking Type, PAX, Booking Status, Voucher Status, Group No, Group Name, Customer, Visa Company, Manual No.
Edit the booking	Action → **Edit**. Opens the booking. Change what you need and click Save.
Voucher	Action → **Create Voucher** (first time) or **Print Voucher** (after).
Prices and status	Action → **Accounts Update**.
Reports on one booking	Action → **Invoice (Sale)** or **Profit/Loss**.

⚠ **WARNING**
A **locked** booking cannot be edited. The page says *This booking is locked. Unlock it in Accounts Update before editing.* The IATA may also be locked: *Unlock it in Update IATA before changing it.*

TIP
Edit opens in a new browser tab. Close the tab when you finish and click Search again to refresh the list.

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.

New Umrah Booking

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select a Customer.	Choose a customer in **Customer:** and save again.
Please enter a valid Booking Date.	Type or pick a real date in **Booking Date:**.
Add mutamers, or tick Short Booking and enter the Adults / Childs / Infants.	Add at least one mutamer, or use Short Booking with numbers.
Please enter at least the Passport or the First Name.	Fill **Passport:** or **First Name:** in the mutamer panel.
Please select the Gender.	Choose Male or Female.
Passport ... is already added to this booking.	The same passport is in the list. Edit that row instead.
Passport ... is entered more than once in this booking.	Remove the repeated row and save.
Every mutamer needs a Passport No or First Name.	One row is empty. Fill it or remove it.
Booking Number ... already exists.	Leave **Booking Number:** empty to get the next number.
Allowed file extensions: .jpg, .jpeg, .gif, .png	Choose a picture in one of these formats.
Maximum file size: 1 MB.	Make the picture smaller and choose it again.
You are not allowed to save bookings as Final; save as Draft.	The word Final is the status you chose. Choose **Draft** in **Booking Status:** or ask for the right.
The selected Customer was not found.	Reload the page and choose the customer again.
Booking ... is locked. Unlock it in Accounts Update before editing.	Ask a user with the right to clear **Booking Lock** / **Voucher Lock**.
The IATA of booking ... is locked. Unlock it in Update IATA before changing it.	Use Update IATA or leave IATA unchanged.
Session expired. / Your session has expired. Please log in again.	Sign in again. Save again after login.

Quick Booking and imports

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select Customer! / Please enter Booking Date! / Please select Package!	Quick Booking needs all three. Fill them and save.
Row 1: enter a Passport No or First Name.	Row number shows which row. Fill it or delete it.
Row ...: DOB is not a valid date. / DOB cannot be in the future.	Correct the date of birth.
Passport ... already exists in booking .... Tick Allow Duplicate to save it anyway.	Tick **Allow Duplicate** only if you really need it.
Please select a standard CSV file to import.	Choose the file first.
Invalid file format. Please upload a standard .csv or .txt file.	Use the Standard Format file.
Please select a Package. / Please select a Customer.	Import Booking needs both.
The uploaded file is empty. Please provide CSV rows to import.	Add rows to the file.
The file is larger than 5 MB.	Split the file into smaller files.
The Nusuk header row was not found. The sheet needs a Passport column and a Name column (for example Passport Number, First Name, Last Name).	Check the Excel file has the header row with these columns.
No mutamer rows were found below the header row.	Make sure people are listed under the header.
Please select the mutamers to book in the Status list.	Tick people in the **Status** list.
Some selected mutamers are already booked or were removed. The list was refreshed, please select again.	Select again from the refreshed list.
The selected mutamers were imported with different packages. Create one booking per package.	Create the bookings one package at a time.
Please enter the Booking No to add the PAX to.	Fill **Add to Booking:**.

Voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select at least one mutamer to create a voucher.	Tick at least one person.
A voucher has already been issued for this booking (status: ...).	Use **Print Voucher** or **Edit** instead of creating a new one.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Hotel ...: please select a hotel or untick the row.	Choose a hotel or untick that row.
Hotel ...: Checkin and Nights are required.	Fill **Checkin** and **Nights**.
Please choose a Save Mode (Draft or Approved).	Pick one in **Save Mode:**.
This booking is locked and cannot be changed.	Clear the lock in Accounts Update.
Customer ... is blocked: new bookings, vouchers and ticket invoices cannot be saved for this customer.	Ask your manager to review the customer.
You are not allowed to save hotel vouchers as Approved; save as Draft.	Save as Draft. A user with the right approves it.
You are not allowed to modify a final (Approved) hotel voucher.	Ask a user with the modify right.
This customer is not allowed Star vouchers (Allow Star Voucher is not ticked).	Untick Star Voucher or ask your administrator.
Warning: requested ... room(s) exceeds availability ... You can still save.	Check the hotel dates and rooms. You may still save.
Warning: the hotel is blocked on one or more of these nights.	Choose other dates or another hotel.

Approval and posting

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
... cannot be approved: customer ... requires an advance payment (Advance Required For Voucher) and no payment or receipt is recorded.	Record a payment or receipt for the customer, then approve again. The voucher goes back to Draft.
... cannot be approved: ... exceeds the credit limit ...	The customer balance plus this voucher is above the limit. Ask for a review.
Not posted to accounts: only Approved vouchers are posted (status ...).	Save the voucher as Approved.
Not posted to accounts: zero amount (Net Charges 0). Check the package hotel/visa/transport rates for these dates.	Ask your administrator to add the missing rates.
No visa rate for ...	The visa rate setup does not match this booking. The reason is listed after the message.
Not posted to accounts: the booking has no customer.	Add the customer to the booking.
Not posted to accounts: the booking is cancelled.	A cancelled booking is not posted.
No account found for ...	An account is missing in Chart of Accounts or Financial Settings. Tell your administrator.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Booking is locked: status, locks and notes were saved, amounts were not changed. Clear Booking Lock and Voucher Lock to edit amounts.	Untick the locks, click **Update Booking**, then edit amounts.
Nothing to save. / Booking accounts are not available for your account.	Reload the page or ask for access.

SECTION 7

7 Quick checklist

Before you start

- [ ] Customer, package, hotels and rates exist
- [ ] I am signed in and see the Umrah menu
- [ ] I have passports and dates ready

Booking

- [ ] Booking Number left empty
- [ ] Booking Date and Customer chosen
- [ ] Package, Category, IATA, VISA Status chosen
- [ ] Booking Status is correct (Draft if unsure)
- [ ] Group No and Group Name entered

Mutamers

- [ ] Passport or First Name and Gender for everyone
- [ ] Dates of birth checked (Adult / Child / Infant)
- [ ] Passport expiry dates checked
- [ ] Duplicate warnings understood
- [ ] Family Head is the right person

Save

- [ ] Clicked Save and saw *saved successfully*
- [ ] Booking number noted

Voucher

- [ ] Create Voucher from the booking list
- [ ] Hotels with Checkin and Nights
- [ ] Flights and transport filled
- [ ] Save Mode = Draft until checked

Pricing and approval

- [ ] Custom rate boxes: ticked only when I typed my own price
- [ ] Totals and Net Charges look right
- [ ] Voucher saved as Approved only when final
- [ ] Ledger posting message is positive

Print

- [ ] Voucher printed or saved as PDF
- [ ] Invoice (Sale) printed

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 2 — Umrah Vouchers & Accommodation

Turn a booking into an Umrah voucher, make accommodation-only vouchers, assign mutamers, print and export.

TRAINING GUIDE · SIMPLE ENGLISH

CREATE VOUCHER | VOUCHER DETAIL | ACCOMMODATION | ASSIGN MUTAMERS | PRINT & EXPORT | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Umrah Vouchers & Accommodation** 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

An **Umrah Voucher** is the travel document for a booking: mutamers, hotels, flights, transport and ziarat. You create it from a booking in two steps (choose mutamers, then fill the voucher). An **Accommodation Voucher** is a hotel-only voucher with no mutamer list. Vouchers are saved as **Draft** or **Approved**, and can be **Void**.

MENU PATH

Umrah (top menu) → **New Umrah Voucher** (Voucher group)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Umrah → Voucher	**Umrah Voucher List** **New Umrah Voucher** **Accommodation Voucher** **Voucher Export**
Umrah → Advance	**Assign Mutamers to Voucher**
Umrah Booking List	row action **Create Voucher** / **Print Voucher**

HOW THE WORK FLOWS

Booking (Mutamers and package) → **Create Voucher** (Pick mutamers) → **Voucher** (Hotels, flights, transport) → **Approve & print** (Draft → Approved)

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
Umrah booking	Umrah → New Umrah Booking	Vouchers are made from a booking with mutamers.
Hotels and rates	Reservation → Hotel List	Hotel lines, **Rate** and availability.
IATA and visa company	Admin Backend setups	**IATA:** and **Visa Company:**.
Voucher rights	Customer / role settings	Approved save mode and *Allow Star Voucher*.

SECTION 3

3 Step-by-step data entry

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

Part A — Create a voucher from a booking

Open **Umrah → Umrah Booking List** (or **New Umrah Voucher**). Find the booking. Its **Voucher Status** shows *Pending*.

Booking list

1 **Create Voucher**
Open the row actions and click **Create Voucher**. (When a voucher already exists the action is **Print Voucher**.)

New Voucher Mutamers

1 **Pick mutamers**
Tick the mutamers (Passport, Mutamer Name) to put on this voucher.

2 **Create**
Click **Create Voucher**. You see *Voucher created for {0} mutamer(s).* and the voucher form opens.

NOTE
Creating the voucher sets the booking status to **Final**.

Part B — Fill the voucher

Voucher — header

1. **Numbers**
   `Booking No:`, `Date:`; type `Manual/Service No:` if you use paper numbers.

2. **Who**
   `Customer:`, `Branch:`, `Package:`, `IATA:`, `Visa Company:`. Optional `Customized Name on Voucher:`.

3. **Options**
   Tick `Self Accommodation` if the guest has own hotel. Choose `Travel By:`. Tick `Ziarat:` `Makkah` / `Madina`.

4. **Contact**
   `WhatsApp No:` and `Notes:`.

Voucher Detail — grids

1. **Mutamers**
   Check Passport No, Mutamer Name, DOB, PAX, Family Head, Bed, PNR, Visa Number, Visa Rate.

2. **Hotels**
   Fill each **Hotel** line: room type, quantity, check-in, nights, check-out, view, meal plan, rate.

3. **Flights**
   Flight, No, FROM, TO, Date, ETD, ETA.

4. **Transport**
   Transporter, Travel Date, Transport Route, Transport Type.

Voucher — save

1. **Star / VIP**
   Tick `Star Voucher:` or `★ Priority / VIP` if needed.

2. **Uploads**
   Attach files under `Uploads:` (PDF, JPG or PNG).

3 **Save Mode**

Choose **Save Mode:** **Draft** or **Approved** and click **Save**. You see *Voucher saved as ....*

Part C — Accommodation Voucher (hotel only)

Open **Umrah → Accommodation Voucher**.

Voucher, Agent & Guest

1. **Voucher**
   Voucher No:, Date:, Manual No:, IATA:.

2. **Guest**
   Customer: *and* *Passport No:* are **required**. Family Head:, Customized Name on Voucher:, Contact / Mobile:, Group Name:.

3. **Pax**
   Adults:, Childs:, Infants:; Total Pax: and Beds: fill. Choose Package:.

Hotel & Room Details

1. **Tick a hotel**
   Tick **Makkah** and/or **Madina** and choose the hotel.

2. **Room line**
   Room Type, Qty, Checkin, Nights, Checkout, Confirm No, View Type, Meal Plan, Excl Night., Status.

3. **Rates**
   Rate loads from the rate list (*No rate* if none). Total Amount is calculated.

Flights, transport and save

1. **Flights**
   Tick Allow Flight Information to add flights.

2. **Transport**
   Add Transporter, Travel Date, Transport Route, Transport Type, BRN, Amount.

3. **Save**
   Type Notes:, choose Save Mode: (Draft / Approved / Void) and click Save. You see *Voucher saved successfully!*

Part D — Assign mutamers, print and export

Assign Mutamers to Voucher

1 **Step 1**
Choose **Customer:** and click **Search**. Tick the mutamers (Passport, Mutamer Name, PAX, Visa No, Group Name).

2 **Step 2**
Choose the **Booking:**. Tick **Delete existing PAX** only to replace the current list. Click **Assign**.

Print

1 **Print Voucher**
From the list click **Print Voucher**, then **Print Voucher** on the page.

Voucher Export

1 **Export**
Choose **Export Type:**, **Check Field:**, **Date From:**, **Date To:**, optional **Exclude:**; click **Show**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Voucher (from booking)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Booking No: / Date:	From the booking.	Auto
Manual/Service No:	Paper number.	No
Customer: / Branch: / Package:	Booking details.	Yes
IATA: / Visa Company:	Agent and visa company.	No
Self Accommodation / Travel By: / Ziara	Options.	No
WhatsApp No: / Notes:	Contact.	No
Star Voucher: / Priority / VIP	Flags.	No
Save Mode:	Draft or Approved.	Yes

Accommodation Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Date:	Voucher date.	Yes
IATA:	Agent.	Yes
Customer: *	Customer.	Yes
Passport No: *	Lead guest passport.	Yes
Adults: / Childs: / Infants:	At least one.	Yes
Hotel line	At least one ticked hotel.	Yes
Rate / Total Amount	From rate list.	Auto
Save Mode:	Draft / Approved / Void.	Yes

Assign Mutamers

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer:	Step 1.	Yes
Mutamers	Ticked rows.	Yes
Booking:	Step 2.	Yes
Delete existing PAX	Replace list.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find vouchers	**Umrah Voucher List**: Voucher No, Customer, Branch, dates, status (Draft, Approved, Void), group, package, hotels, room type; **Search**.
Change status	Use **Action** on the list to approve, void or print.
Uploads	Voucher uploads take PDF, JPG or PNG only.

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.

Voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please choose a Save Mode (Draft or Approved).	Choose **Save Mode:**.
This booking is locked and cannot be changed.	Ask a manager.
Your account is not allowed to save vouchers as ...	Save as Draft.
This customer is not allowed Star vouchers (Allow Star Voucher is not ticked).	Untick Star or update the customer.
Invalid booking reference.	Open from the booking list.

Accommodation voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select the voucher date.	Set **Date:**.
Please select an IATA.	Choose **IATA:**.
Please select a customer.	Choose **Customer: ***.
Please enter the passport no.	Type **Passport No: ***.
Please enter the number of adults, childs or infants.	Type counts.
Please tick at least one hotel and fill in its details.	Tick Makkah or Madina.

Assign and export

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select customer in step 1 to display Mutamers.	Choose customer.
Please select Mutamers from grid in Step 1.	Tick mutamers.
Please select booking from step 2 to transfer Mutamers.	Choose booking.
All selected passports are already in booking ...	Nothing to add.
Enter Date From and Date To.	Set dates.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Only PDF, JPG or PNG files can be uploaded.	Change file type.

SECTION 7

7 Quick checklist

Before save

- [ ] Right mutamers picked
- [ ] Hotels with dates and rates
- [ ] Flights and transport
- [ ] Save Mode chosen

After save

- [ ] Voucher Status not Pending
- [ ] Approved when final
- [ ] Printed for the guest
- [ ] Uploads attached

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 3 — Umrah Groups & Packages

Make group packages from an Excel file, register reservations and ticket-only seats, transfer mutamers, and issue Partner API keys.

TRAINING GUIDE · SIMPLE ENGLISH

GROUP MAKER | PACKAGES | REGISTER | RESERVATIONS | GROUP TICKETS | TRANSFER | PARTNER API | CHECKLIST

For trained staff and customers

archsoftware.net.pk

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START HERE

How to use this guide

This guide teaches you to enter data in the **Umrah Groups & Packages** 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

Umrah Groups are ready-made packages with fixed travel dates, flights, hotels and seats. You create them with the **Group Maker** from an Excel file. Customers (or your staff) then book seats as **Umrah Reservations**. Partners can book through the **Umrah Groups API** with a key you issue.

MENU PATH

Umrah top menu → **Umrah** menu group → **Umrah Groups / Packages / Reservations / Group Maker**

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Umrah → Umrah	Umrah Groups · Umrah Packages · Umrah Reservations · Group Maker
Umrah → Booking Import	Nusuk Import to Reservation
Umrah → Advance	Transfer Mutamer - Reservation
Tickets → Ticket Groups	Umrah Group Tickets
Admin → CRM & Customers	Umrah Groups API Keys
Admin Backend → Groups	Groups · Packages · Reservations · Price Adjustment · API List

HOW THE WORK FLOWS

Group Maker Excel file → group + packages → **Umrah Groups** Search packages → **Register** Reservation with passports → **Reservations** Confirm, voucher

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
Hotels	Admin Backend → Umrah → Setup → Hotels	Makkah Hotel and Medinah Hotel names in the file must match.
Airlines and sectors	Admin Backend → Contacts → Airlines; Umrah → Setup → Sectors	Airline and sectors such as LHE-JED.
Customers	Admin → New Customer	Reservations need a customer. For API or portal use tick **Allow Umrah Group Reservation** on the customer.
Exchange rate	In the package file	The file must give an Exchange Rate.

SECTION 3

3 Step-by-step data entry

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

Part A — Make a group with the Group Maker

Open **Umrah → Umrah → Group Maker** (also the **New Package** button on Umrah Packages).

Umrah Group Maker

1 Download the template
Click **Sample template**. The file is *umrah_group_package_file.xlsx*.

2 Fill the group columns
Group Title, Travel Date, Return Date, Airline, Departure Flight No, Departure Sector (e.g. LHE-JED), Departure ETD, Departure ETA, Arrival Flight No, Arrival Sector, Arrival ETD, Arrival ETA, Baggage, Group Seats.

3 Nights and city
Makkah Nights, Medinah Nights and First City (Makkah or Medinah). Exchange Rate is required.

4 One row per package
Package, Makkah Hotel, Medinah Hotel, Seats and the prices: Sharing, Quad, Triple, Double, Quint, Child Without Bed, Infant.

5 Load File
Click **Load File** and choose the .xlsx or .csv file. Errors are listed.

6 Choose what to do
If a package already exists choose **Skip**, **Update existing** or **Create anyway**. If some rows have errors you can choose **Make group with the valid packages only**.

7 Make Group
Click **Make Group**. Message: *Group created successfully.*

⚠ **WARNING**
No Group Seats or package Seats are given: the group is made with 0 seats. Fill Group Seats or Seats.

Part B — Find packages and register a reservation

Umrah Groups (package search)

1 Search

Open **Umrah Groups**. Use the search box (package, hotel, airline or group code), Sector, Travel date and Duration, then Search.

2 Filter and sort

Use **Seats needed**, Airlines, Makkah hotel, Madinah hotel and the sort buttons (Cheapest, Nearest, Most seats).

3 Book

Open the package and choose a room price to register.

Register Umrah Package

1 Customer and Family Head

Choose Customer: (type to search) and type the Family Head: name.

2 Room Type and PAX

Choose Room Type: (Sharing, Quad Bed, Triple Bed, Double Bed, Quint Bed, Six Bed) and PAX:. Check the Travel Date:.

3 Passengers

For each person fill Passport No, Issue, Expiry, Surname, Given Name, Gender and DOB. Tick Child Without Bed or Additional Baggage if needed.

4 Notes and terms

Add Notes: (the form asks for it). Tick I Accept all the Terms & Conditions.

5 Register

Click Register. A reservation number is created.

Part C — Group ticket-only seats

Umrah Group Ticket Reservation

1 Choose the group
Open **Tickets → Umrah Group Tickets** and pick a group with seats.

2 Customer and passengers
Choose `Customer`, type `Family Head`, and the number of `Adults`, `Childs` and `Infants`.

3 Terms and register
Tick `I have read and agree to the terms and conditions` and click `Register`.

> **NOTE**
> *Each infant must travel with an adult.*

Part D — Manage reservations, imports and transfers

Umrah Reservations

1 Search
Open **Umrah Reservations**. Filter by `Reservation No`, `Customer`, `Group`, `Package`, dates, `Type` (Full Package, Ticket Only), `Status` (On hold, Confirmed, Cancelled), `Voucher created`, `Family Head`, `Booking source` (Application, API, Website). Click `Search`.

2 Open
Use `Action` on the row to open the reservation and its **Mutamers**.

Nusuk Import to Reservation

1 File
Open **Umrah → Booking Import → Nusuk Import to Reservation**. Choose the `File:`; rows show in **Work Sheet**.

2 Details
Optional `IATA:`, `Group No.`, `Group Name.`, `Approval Date:`. Click `Import Mutamers`.

3 Add to reservation
Tick people in **Status**, choose the reservation in `Booking:` and click `Add PAX to Booking`. `Remove Selected` removes wrong rows.

Transfer Mutamers (reservation)

1. **Step 1**
   Choose the source **Reservation:**, click **Search** and tick the mutamers.

2. **Option 1**
   Choose another reservation in Step 2 and click **Transfer**.

3. **Option 2**
   Or split them into a new reservation: choose **Package:** and **Room Type:** and click **Reservation Split**.

   > ⚠ **WARNING**
   > *At least one mutamer must stay in reservation ...*

Part E — Partner API keys (basics)

Open **Admin → Umrah Groups API Keys**. Only administrators can issue keys.

Umrah Groups API Keys

1. **Find the customer**
   Type in **Customer ID or name** and click **Search**.

2. **Issue key**
   Click **Issue key** (or **Replace key** if one exists).

3. **Copy the key**
   A new key was issued. Copy it now, or open the documentation with the key. It is not stored in readable form. Use **Open documentation with key** to give the partner a printable guide (Download PDF).

4. **Revoke**
   Click **Revoke** to stop a key at once.

> ⚠ **WARNING**
> The customer must be active, not blocked, and have **Allow Umrah Group Reservation** ticked, or API calls are refused.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Group Maker file (columns)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Group Title	Name of the group.	Yes
Travel Date	Departure date.	Yes
Return Date	After the Travel Date.	No
Airline / flight / sector / ETD / ETA columns	Sectors as two airport codes, e.g. LHE-JED.	No
Group Seats / Seats	Seats for group and package.	No
Makkah Nights / Medinah Nights	At least one.	Yes
First City	Makkah or Medinah.	No
Exchange Rate	Rate for prices.	Yes
Package / Makkah Hotel / Medinah Hotel	Package row.	Yes
Sharing / Quad / Triple / Double / Quint / Child Without Bed / Infant	Prices.	No

Register Umrah Package

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer:	Search and pick.	Yes
Family Head:	Main contact.	Yes
Room Type:	Room type.	Yes
PAX:	Number of people.	Yes
Travel Date:	Travel date of the package.	Yes
Passport No / Issue / Expiry / Surname / Given Name / DOB	Per passenger. Check against the passport.	No
Child Without Bed / Additional Baggage	Options.	No
Notes:	Requests or booking notes. The form marks it required.	Yes
I Accept all the Terms & Conditions	Must tick.	Yes

Umrah Group Ticket Reservation

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer	Customer.	Yes
Family Head	Name.	Yes
Adults / Childs / Infants	Numbers.	Yes
I have read and agree to the terms and conditions	Must tick.	Yes

Transfer Mutamers

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Reservation: (Step 1)	Source.	Yes
Reservation: (Step 2)	Target (Option 1).	No
Package: / Room Type: (Option 2)	For a split.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find packages	**Umrah → Umrah Packages**: filter Package Code, Group Code, Makkah Hotel, Madinah Hotel, Active and click Search.
Find reservations	**Umrah Reservations** (Part D).
Change group prices	Admin Backend → Groups → Price Adjustment, or re-load the file with **Update existing**.
API partner guide	Admin → Umrah Groups API Keys → documentation → Download PDF.

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.

Group Maker

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select a package file first.	Choose the file, then **Load File**.
Select an Excel file (.xlsx) or a .csv file.	Use the template format.
The package file has errors. Correct them and try again.	Fix the rows listed.
Group Title is required.	Fill Group Title.
Travel Date is required.	Fill Travel Date.
Return Date must be after the Travel Date.	Fix the dates.
First City must be Makkah or Medinah.	Use one of the two.
Exchange Rate is required.	Fill Exchange Rate.
Enter the Makkah Nights and / or Medinah Nights.	Fill the nights.

Reservations and tickets

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Customer is required. / Family head is required. / Room type is required. / PAX is required. / Travel date is required. / Notes are required.	Fill the field shown in red on Register Umrah Package.
Please provide Family Head name.	Type **Family Head:**.
Please select Room Type.	Choose **Room Type:**.
Please select a customer.	Choose **Customer**.
Please accept the terms and conditions.	Tick the terms box.
Select at least one passenger.	Enter passengers.
Each infant must travel with an adult.	Add an adult.
This customer is blocked from booking this group.	Ask your manager.
No seats are available in this group.	Choose another group.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
No ticket-only seats are left on this stock.	Choose another group.

Transfer and import

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select reservation from step 1 and click Search.	Pick the source reservation.
Please select Mutamers from grid in Step 1.	Tick people.
Select a different reservation in step 2; the mutamers are already in this reservation.	Pick another target.
Please select the Package for the new reservation.	Choose **Package:**.
Please select the Room Type for the new reservation.	Choose **Room Type:**.
Please select Booking!	Choose the reservation in **Booking:**.
Please select the mutamers to add in the Status list.	Tick rows in Status.

API keys

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter a customer ID or part of the name.	Type in the search box.
No customers matched.	Try another name.

SECTION 7

7 Quick checklist

Group file

- [ ] Template used
- [ ] Title, dates, nights, exchange rate filled
- [ ] Hotel names match setup
- [ ] Seats filled

Reservation

- [ ] Right customer and room type
- [ ] Passports, expiry and DOB checked
- [ ] Terms ticked

API

- [ ] Customer allowed group reservations
- [ ] Key copied once and sent securely
- [ ] Old key revoked

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 4 — MOFA Visa Verification

Check a Saudi visa on the official MOFA service from inside the CRM, one by one or from an Excel list.

TRAINING GUIDE · SIMPLE ENGLISH

SINGLE SEARCH | BULK EXCEL | PRINT | WEBSITE CHECK | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **MOFA Visa Verification** 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

Saudi MOFA Visa Verification looks up a visa record on the Ministry of Foreign Affairs service. You give two search criteria, the nationality and the captcha from the image. For many travellers, load an Excel or CSV list and verify row by row. There is also a simple visa check page on the public website.

MENU PATH

Umrah
top menu
→
MOFA Visa Verification
menu item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Umrah	MOFA Visa Verification
Public website	Visa check page (Site/VisaCheck)

HOW THE WORK FLOWS

Criteria
Two of passport, visa, application, name
→
Captcha
6 digits from image
→
Verify
Record shown
→
Print / export
Keep a copy

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
Traveller details	Booking / passport copy	Passport No, Visa No or Application No, First Name and Nationality.
Internet access to MOFA	Server	The page calls the official MOFA service.

SECTION 3

3 Step-by-step data entry

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

Part A — Single search

Open **Umrah → MOFA Visa Verification**. Click **Single search**.

Search Criteria

1. **First Criterion**
   Choose the type (Passport No, Visa No, Application No or First Name) and type the value.

2. **Second Criterion**
   Choose a **different** type and type its value. A visa number must be exactly 10 digits.

3. **Nationality**
   Choose **Nationality**.

4. **Captcha**
   Type the 6-digit **MOFA captcha** from the image. Use *Refresh captcha* if it is hard to read.

5. **Verify**
   Click **Verify Visa Record**. You see *Visa record found.* and the **Visa record** box. **Clear** starts again.

Visa record

1. **Print**
   Click **Print** to print the record.

Part B — Bulk Excel verification

Click **Bulk Excel Verification**.

Bulk Excel Verification

1. **Get the template**
   Click **Sample Excel/CSV**. Columns are PassportNo, FirstName and Nationality.

2 **Load**
Choose the file (2 MB max) or type in **Or paste a list**. Click **Load list**.

3 **Verify each row**
For the current row type **Captcha for current row** and click **Verify this row**. Repeat.

4 **Export**
Click **Export CSV** or **Export Excel** for the results.

Part C — Visa check on the public website

Visa check

1 **Who uses it**
Travellers or agents on the website.

2 **Search**
Enter the passport number and either the visa number or the first name.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Single search

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
First Criterion	Type and value.	Yes
Second Criterion	Different type and value.	Yes
Nationality	Traveller nationality.	Yes
MOFA captcha	6 digits.	Yes

Bulk

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
File / Or paste a list	PassportNo, FirstName, Nationality.	Yes
Captcha for current row	6 digits per row.	Yes

Website visa check

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Passport number	Passport.	Yes
Visa number or first name	One of them.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Keep a record	**Print** the visa record or export the bulk results.
Update the booking	Enter the visa number in the booking (Umrah → Update Visa).

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.

Single search

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please complete both search criteria, the nationality and the captcha.	Fill all four.
The first and second criteria must be different.	Change one type.
The visa number must be exactly 10 digits.	Check the number.
Please type the 6-digit captcha from the image.	Type the captcha.
The captcha was not accepted. Please type the new image and try again.	Type the new captcha.
No visa record was returned for these details.	Check the values.
The Ministry of Foreign Affairs service is not available at the moment. Please try again later.	Try later.

Bulk

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
The file is too large. The limit is 2 MB.	Split the file.
No rows were found. Use columns PassportNo, FirstName and Nationality.	Use the sample.
No usable rows were found. Each row needs a passport number and a first name.	Fill these columns.

Website

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter both the passport number and the first name.	Fill both.
Please enter both the visa number and the passport number.	Fill both.

SECTION 7

7 Quick checklist

Every check

- [ ] Two different criteria
- [ ] Nationality
- [ ] Fresh captcha
- [ ] *Visa record found.*
- [ ] Printed or exported

Trainee name

Date

Trainer

DATA ENTRY TRAINING

Arch Travel CRM

Module 5 — Hotel Reservation

Hotel setup, voucher reservations, cash/local sales, the Kruki room matrix, check-in and check-out, purchases and outsource rooms.

TRAINING GUIDE · SIMPLE ENGLISH

HOTELS | VOUCHER RESERVATION | CASH/LOCAL SALE | KRUKI | CHECK SYSTEM | PURCHASE | OUTSOURCE | CHECKLIST

For trained staff and customers

archsoftware.net.pk

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START HERE

How to use this guide

This guide teaches you to enter data in the **Hotel Reservation** 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

Hotel Reservation manages your own (company) hotel rooms in Makkah and Madinah. You set up each hotel and its rooms, reserve beds for voucher guests or walk-in (cash/local) guests, then check guests in and out. Room purchases and outsourced rooms record what the rooms cost.

MENU PATH

Reservation (top menu) → **Hotel & Reservation** (menu group) → **Voucher Reservation** (or Kruki, Check System)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Reservation → Hotel & Reservation	Hotel List · Reservation List · Voucher Reservation
Reservation → Sales & Purchase	Cash/Local Sale · Cash/Local Sale (Multi) · Hotel Purchase · Outsource Rooms
Reservation → Check System	Quick Checkin · Checkin/Checkout · Checkin Multiple · Transfer Room · Split Reservation · Cancel Reservation
Reservation → Hotel Status	Pending Reservation · Pending Cost · Pending Private · Tentative Report
Reservation → Status & Planning	Hotel Status · Hotel Kruki · Hotel Scheduler
Admin → System Functions	Quick Discounts

HOW THE WORK FLOWS

Hotel and rooms (Setup) → **Reserve** (Voucher or Cash/ Local Sale) → **Check in** (Room number) → **Transfer / split** (If needed) → **Check out** (Close the stay)

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
Hotels and rooms	Reservation → Hotel List (Rooms tab)	Rooms must exist and be valid for the dates (Effective / Cease Date).
Room Types	Admin Backend → System → Room Types	Room Type on rooms and reservations.
Service Providers	Admin Backend → Contacts → Service Providers	Needed for Hotel Purchase and Outsource Rooms.
Approved Umrah vouchers	Umrah module	Voucher Reservation reserves rooms for an existing Booking/Voucher Number.
Customers	Admin → New Customer	Cash/Local Sale and Kruki reservations need a customer.

SECTION 3

3 Step-by-step data entry

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

Part A — Set up a hotel and its rooms

Open **Reservation → Hotel List**. Click **Add New** or open a hotel to edit it on the **Hotel** page.

Hotel

1 Main details

Fill **Title *** (**required**), **Display Title**, **Short Name**, **City**, **Distance**, **Category**, **Hotel Type**, **Hotel Star**.

2 Dates and address

Set **Effective Date** and **Cease Date**. Fill **Address**, **Hotel Contacts**, **Email**, **Map link** and the Arabic fields if used.

3 Accounts

Choose **Sale Account**, **Payable Account**, **Purchase Account**, **Expense Account** and **Service Provider**, or click **Update Hotel Finance** after saving.

4 Options

Tick **Booking Allowed** and **Active**. Other options (**Voucher Only**, **Full Room Charges**, **Zero Rate**, **Voucher Locking** ...) change behaviour; set them as told.

5 Save

Click **Save**, **Save and Close** or **Save and New**.

6 Rooms and other tabs

After saving, open the **Rooms** tab to add rooms (room number required). Other tabs: **Hotel Rates (PP)**, **Hotel Cost (PP)**, **Pictures**, **Facilities**, **Hotel Block Dates**, **Contacts**.

> ⚠ **WARNING**
> *Save the hotel before adding rooms.*

Part B — Voucher Reservation (rooms for a voucher)

Open **Reservation → Voucher Reservation**. The page title is **Voucher Reservation**.

Voucher Reservation

1 Find the voucher
Type the **Booking/Voucher No:** and click **Search**. **Customer:**, **Package:** and **PAX:** fill in.

2 Choose hotel and dates
Choose **Hotel:** and check **Checkin:** and **Checkout:**.

3 Room needs
Enter **PAX (Beds Assign):**, **Room Type:** and **Sharing Type:** (Family, Male or Female for sharing rooms). To change the room type tick **Unlock Room Type:** and write **Unlock Notes:**.

4 Find Room
Click **Find Room**. Pick **one** room in **Available Room List**.

5 Reservation detail
Optional: **Charge Nights:**, **Service Provider:**, **Purchase REF No:**, **Cost:**, **Extra:** (0 to 3), **Contact Number:**, **Notes:**, **Extra Bed:**.

6 Reserve or check in
Click **Reserve**. To check the guests in now click **Checkin**. **Tentative** holds the room without confirming.

Part C — Cash/Local Sale (walk-in guests)

Open **Reservation → Sales & Purchase → Cash/Local Sale**. It reserves company hotel rooms only.

Cash/Local Sale

1 Guest
Choose `Customer:`, type `Passport / Ref No:`, `Guest Name:` (**required**) and `PAX:` (**required**). To add to an earlier sale type `Add To Confirmation No:`.

2 Find room
Choose `Hotel:`, `Checkin:`, `Checkout:`, `Room Type:`, `Sharing Type:` and click `Find Room`.

3 Rates
Pick one room. Enter `Rate Buying:`, `Rate Selling:`, `Nights To Charge:`, `Extra Bed:`, `Contact Number:` and `Notes:`.

4 Reserve
Click `Reserve` (or `Checkin` to check in at once).

Part D — Kruki room matrix

Open **Reservation → Status & Planning → Hotel Kruki**. It shows every room and bed of a hotel by date.

Kruki

1 Show the hotel
Choose `Hotel:` and `Date Time:`, click `Show`. Search rooms, mutamers or voucher numbers with the search box.

2 New reservation
Click a free room. Fill `Customer:`, `Passport / Ref No:`, `Guest Name:`, `PAX (Beds):`, `Checkin Date:`, `Checkout Date:`, `Sharing Type:`, `Contact Number:`, `Selling / Buying:`, `Notes:`. Click `Reserve` or `Checkin`.

3 By voucher
Click `By Voucher`, type the `Voucher No / Booking Ref:`, click `Search Voucher`, pick a verified sector and reserve.

4 Update, transfer or cancel
Open a booking: `Update Booking`, `Transfer Booking` (needs `Room No:`, `Transfer Date:` and `Transfer Time:`) or `Cancel Booking`.

5 **Print**

Print Kruki or Checkout Report.

Part E — Check system (check in, check out, transfer, split, cancel)

These screens list room reservations with a **Search** box (name, passport, confirmation no., hotel or room). Each row has its own button.

Check system screens

1. **Quick Checkin**
   Review the list and check guests in. The page warns *Please review before checking in:* when something is missing.

2. **Checkin/Checkout**
   Find the guest and click **Check in** or **Check out** on the row.

3. **Transfer Room**
   For a checked-in guest type the new room in **Room** and click **Set room**.

4. **Split Reservation**
   Type the value asked for and click **Split**.

5. **Cancel Reservation**
   Click **Cancel** on the row. The status becomes Cancelled.

6. **Quick Discounts**
   In **Admin → Quick Discounts** type a **Discount** on the row and click **Set discount**. The page shows *Saved*.

Part F — Hotel Purchase and Outsource Rooms

Hotel Purchase

1. **Add New**
   Open **Hotel Purchase**, click **Add New**.

2. **Details**
   Fill **Date:**, **Hotel:**, **Service Provider:**, **Start Date:**, **End Date:**, **Room Type:**, **Room No's:**, **Total Rooms:**, **Total Beds:**, **Total Cost:**. **Bed Cost:** is worked out.

3. **Save**
   Click **Save**.

Outsource Rooms

1 **Room**

Choose **Hotel:**, *optional* ***Actual Hotel:***, ***Service Provider:***, type **Room No: ***, **Room Type:**, **Beds:**.

2 **Cost and dates**

Enter **Cost per Night (SAR): per bed if Sharing**, **Effective Date:** *and* ***Cease Date:***. **Nights:** and **Total (SAR):** are calculated.

3 **Save**

Tick **Active:** (and **Sharing:** if beds are sold separately). Click **Save**. An accounts voucher is created.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Hotel

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Title *	Hotel name.	Yes
City / Distance / Category / Hotel Type / Hotel Detail	Hotel details.	No
Effective Date / Cease Date	Validity.	No
Sale / Payable / Purchase / Expense Account	Accounts.	No
Booking Allowed / Active	Tick to use.	No

Voucher Reservation

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Booking/Voucher No:	Voucher to reserve for.	Yes
Hotel:	Company hotel.	Yes
Checkin: / Checkout:	Dates.	Yes
PAX (Beds Assign):	Beds in the room.	Yes
Room Type: / Sharing Type:	Sharing rooms need Family, Male or Female.	No
Unlock Notes:	Needed to change room type.	No
Room No:	From Find Room.	Yes
Cost: / Extra: / Extra Bed:	Extra 0 to 3. Cost not negative.	No

Cash/Local Sale

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer:	Customer.	No
Guest Name:	Guest.	Yes
PAX:	People.	Yes

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Hotel: / Checkin: / Checkout:	Room search.	Yes
Rate Buying: / Rate Selling:	Not negative.	No
Nights To Charge:	Not negative.	No

Hotel Purchase

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Hotel:	Hotel.	Yes
Start Date: / End Date:	End not before start.	Yes
Total Rooms:	Rooms.	Yes
Total Beds:	Not less than rooms.	Yes
Total Cost:	Cost.	Yes
Service Provider: / Room Type: / Room Details	Details.	No

Outsource Rooms

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Hotel: *	Hotel.	Yes
Service Provider: *	Supplier.	Yes
Room No: *	Room.	Yes
Beds:	Needed for Sharing rooms.	No
Cost per Night (SAR): per bed if Sharing	Not negative.	No
Effective Date: * / Cease Date: *	At least 1 night.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find a reservation	**Reservation List**: filter Voucher No:, Passport:, Status:, Hotel:, check-in / check-out dates, Confirm No:, Mutamer:, Room No: and click Search.
Edit	Open the row (View), change dates, price or notes, click Update.
Print	Invoice or Voucher on the reservation.
Pending work	Pending Reservation, Pending Cost, Pending Private and Tentative Report list what still needs action.

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.

Hotel

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter Hotel Title To Continue!	Fill **Title *** .
Save the hotel before adding rooms.	Save first.
Please enter the room number.	Type the room number.
This hotel is used by other records and cannot be deleted.	Untick **Active** instead.

Reservations

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please Enter Booking/Voucher Number!	Type the voucher number.
Please select Hotel to proceed!	Choose **Hotel:** .
Please select Checkin and Checkout dates.	Fill both dates.
Please select 1 Room to Reserve!	Pick exactly one room.
Please enter PAX (Beds Assign).	Type the beds.
Please enter Unlock Notes to change the room type.	Write **Unlock Notes:** .
A Sharing room needs a Family, Male or Female sharing type.	Choose **Sharing Type:** .
Extra Bed: the number must be in the range 0...3	Use 0 to 3.
The selected room is no longer available for these dates. Click Find Room again.	Search again.
Please enter Guest Name!	Type the guest name.
Please enter PAX!	Type PAX.
Cash/Local Sale reserves company hotel rooms only.	Choose a company hotel.

Kruki and check system

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter a Voucher No to search.	Type the voucher number.
Please enter a Room No.	Type the room.
Please enter a Transfer Date (dd/mm/yyyy).	Fill the date.
Please enter a Transfer Time (HH:mm).	Fill the time.
Check-out date/time must be after Check-in date/time.	Fix the times.
No Beds Available	Choose another room.
Cannot update Room {0}: Check-in date ({1}) is earlier than Room Effective Date ({2}).	The room is not valid on that date; choose another room or fix the room dates.

Purchase and outsource

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
End Date cannot be before Start Date.	Fix the dates.
Total Beds cannot be less than Total Rooms.	Correct the numbers.
Please select Service Provider to continue!	Choose the supplier.
Cease Date must be after Effective Date (at least 1 night).	Fix the dates.
Sharing rooms are costed per bed: please enter Beds.	Type **Beds:**.

SECTION 7

7 Quick checklist

Setup

- [ ] Hotel active and booking allowed
- [ ] Rooms added with dates
- [ ] Accounts linked

Stay

- [ ] Checked in with room number
- [ ] Transfers recorded
- [ ] Checked out on time

Reserve

- [ ] Right voucher or guest
- [ ] Dates and PAX correct
- [ ] Sharing type chosen
- [ ] One room selected

Cost

- [ ] Purchases and outsource rooms entered
- [ ] Pending Cost list empty

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 6 — Star Booking

Book hotel rooms for walk-in or direct guests, allocate rooms and check them in, and follow the intimation report.

TRAINING GUIDE · SIMPLE ENGLISH

NEW BOOKING | ROOMS GRID | PAYMENT | ROOM ALLOCATION | LISTS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Star Booking** 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

Star Booking is a direct hotel booking for a guest, outside an Umrah package. You enter the guest, hotel and rooms, save the booking with a status, take an advance if any, then allocate a room number and check the guest in.

MENU PATH

Star
top menu
→
New Star Booking
menu item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Star	New Star Booking · Star Booking List · Room Allocation · Star Intimation Report

HOW THE WORK FLOWS

Booking
Guest, hotel, rooms
→
Status
Tentative / Confirmed / Reserved
→
Allocate
Room number
→
Check in
Guest arrives

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
Customer	Admin → New Customer	**Customer:** on the booking.
Hotel and room types	Reservation → Hotel List / Admin Backend	**Hotel:** and **Room Type**.
Supplier	Service provider account	**Service Provider/Supplier:** for cost.
Cash / bank account	Chart of Accounts	**Account:** if you take an advance.

SECTION 3

3 Step-by-step data entry

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

Part A — New Star Booking

Open **Star → New Star Booking**. The page title is **Hotel Booking**.

Hotel Booking — header

1. **Date and customer**
   Check **Date:**. Choose **Customer:**.

2. **Guest**
   Type **Guest Name:**, **Adults:**, **Childs:** and **Infants:**. **Total Pax:** and **Total Beds:** fill by themselves.

3. **Hotel**
   Choose **Hotel:** and **Service Provider/Supplier:**. Type the hotel **Confirmation No:** if you have it.

4. **Room allocation**
   Tick **Auto Room Allocation:** if the system should give room numbers on save.

Hotel Booking — rooms grid

1. **Add a room line**
   For each line choose **Room Type**, **Qty**, **Checkin** and **Checkout**.

2. **View and meal**
   Choose **View Type** (Standard, City View, Haram View, Partial Haram) and **Meal Plan** (R/O, BB, HB, FB).

3. **Rates**
   Type **Cost** and **Sale** per unit. **Total Cost**, **Total Sale** and the **Net Total** are calculated.

4. **Room No**
   Type a **Room No** if already known.

Hotel Booking — status and payment

1 Save Status
Choose **Save Status:**: Tentative Request, Confirmed, Reserved or Cancelled.

2 Advance
If the guest pays now, choose **Account:**, type **Amount:** and **@ Exchange Rate:**.

3 Notes and save
Type **Notes:** and click **Save**. You see *Booking saved.*

Part B — Room allocation and check-in

Open **Star → Room Allocation** (title **Star Room Allocation**).

Star Room Allocation

1 Find the booking

Type the **Registration No:** and click **Search**. **Booking/Voucher Number:**, **Customer:**, **Hotel:** and **PAX:** show.

2 Pick a room

Click **Room Lookup**. Choose a room from the grid (Room No, Floor, Room Type, Beds). **Room No:** fills.

3 Contact

Type **Contact Number:** and **Notes:**.

4 Reserve or check in

Click **Reserve** to hold the room, or **Checkin** when the guest arrives.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Hotel Booking — header

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Date:	Booking date.	Yes
Customer:	Who pays.	Yes
Guest Name:	Lead guest.	Yes
Adults: / Childs: / Infants:	Guest count.	Yes
Total Pax: / Total Beds:	Calculated.	Auto
Hotel:	Hotel.	Yes
Service Provider/Supplier:	Supplier for cost.	No
Confirmation No:	Hotel confirmation.	No
Auto Room Allocation:	Give room numbers on save.	No
Save Status:	Booking status.	Yes
Notes:	Notes.	No

Rooms grid

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Room Type / Qty	Room and how many.	Yes
Checkin / Checkout	Stay dates.	Yes
View Type / Meal Plan	View and meals.	No
Cost / Sale	Per unit.	Yes
Total Cost / Total Sale	Calculated.	Auto
Room No	If known.	No

Payment

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Account:	Cash or bank account.	No
Amount:	Advance received.	No
@ Exchange Rate:	Rate to base currency.	No

Star Room Allocation

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Registration No:	Booking registration.	Yes
Room No:	From Room Lookup.	Yes
Contact Number: / Notes:	Guest contact.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find a booking	**Star → Star Booking List**: filter by **Booking No:**, **Branch:**, **Customer:**, **Guest Name:**, **Status:**, check-in and check-out dates; set **Records:** and click **Search**.
Daily arrivals	**Star → Star Intimation Report**: filter by check-in/out dates, hotel, room type, view, meal plan and status, then **Search**.
Change status	Open the booking, change **Save Status:** and **Save**.

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.

Room allocation

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
No booking found for that registration number.	Check the **Registration No:**.
Select a room first.	Use **Room Lookup** and pick a room before **Reserve** or **Checkin**.

Booking

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Totals are wrong	Check **Qty**, dates, **Cost** and **Sale** in every line.
Booking does not appear in the list	Clear filters; check **Status:** and the date range.

SECTION 7

7 Quick checklist

Before save

- [ ] Customer and guest name
- [ ] Adults / children / infants
- [ ] Hotel and supplier
- [ ] Every room line has dates and rates
- [ ] Status chosen

After save

- [ ] *Booking saved.* shown
- [ ] Advance recorded with account
- [ ] Room allocated
- [ ] Checked in on arrival

Trainee name

Date

Trainer

DATA ENTRY TRAINING

Arch Travel CRM

Module 7 — Transport

Set up routes, vehicles and rates, make transport vouchers, run outsource trips and dispatch from the board.

TRAINING GUIDE · SIMPLE ENGLISH

SETUP | TRANSPORT VOUCHER | REQUESTS | OUTSOURCE TRIPS | DISPATCH | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Transport** 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

Transport moves guests between airports, hotels and cities. First set up **Routes**, **Vehicles & Types** and **Transport Rates**. Then make a **Transport Voucher** for a customer, attach trips to an **Outsource Trip** if a transporter does the job, and follow the day on the **Dispatch Board**.

MENU PATH

Transports (top menu) → **New Transport Voucher** (menu item)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Transports → Setup	Routes · Vehicles & Types · Transport Rates
Transports → Work	Dashboard · Dispatch Board · Transport Requests · New Transport Voucher · Transport Voucher List
Transports → Outsource	Outsource Trips · New Outsource Trip · Transport Intimation Report
Umrah → Self Hotel Transport	New Transport Request · Request List

HOW THE WORK FLOWS

Setup (Routes, vehicles, rates) → **Voucher** (Customer trips) → **Assign** (Vehicle or outsource trip) → **Dispatch** (Board on the day)

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
Transporters	Service provider accounts	**Transporter:** on vouchers and trips.
Customers	Admin → New Customer	**Customer:** on the voucher.
Exchange rate	SAR rates	**Exchange Rate (PKR per SAR) :**.
Confirm right	Roles & Permissions	To confirm transport vouchers.

SECTION 3

3 Step-by-step data entry

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

Part A — Setup: routes, vehicles, rates

Transport Routes

1 Add Route

Open **Transports → Routes**, click **New**. Type **Route Name *** (**required**), **Full Title** (defaults to the route name), **From City / Sector**, **To City / Sector**, **Default Rate (SAR)**.

2 Kind

Tick **Arrival**, **Departure**, **Inter City** or **Ziyarat**. Add **Arrival Description** / **Departure Description**. Tick **Show on Voucher** and **Active**. Click **Save**.

Vehicles & Transport Types

1 Add Transport Type

Type **Type Name ***, **Short Name**, **Capacity**, **Description**. Tick **Default**, **Private**, **Sharing**, **Show on Voucher**, **Show on Web**, **Active**. **Save**.

2 Add Vehicle

Type **Vehicle Name** or **Plate / Number** (one is needed), **Vehicle Type**, **Model**, **Seats**, **Driver**, **Driver Mobile**, **Notes**. **Save**.

Transport Rates

1 Add Rate

Choose **Route** *and* ***Vehicle Type*** (**required**), optional **Transporter** and **Customer Type**.

2 Prices

Type **Sale (SAR)** and/or **Cost (SAR)**; **Profit** shows. Set **Valid From** / **Valid To**, **Notes**, **Active**. **Save**.

Part B — New Transport Voucher

Open **Transports → New Transport Voucher**.

Transport Voucher — header

1. **Voucher**
   `Voucher No:` is *Created on save*. Set `Voucher Date:`.
2. **Parties**
   Choose `Transporter:` and `Customer:`. Choose `Voucher Status:`.
3. **Guest**
   Type `Guest Name:`, `PAX:`, `Contact #:`, `Notes:` and `Exchange Rate (PKR per SAR) :`.

Transport Voucher — trips

1. **Trip**
   Set `Travel Date`, `Travel Time`, `Transport Type` and `Transport Route`. The saved rate fills `Unit Price` and `Unit Cost`.
2. **Custom price**
   If no rate is saved you see *No saved rate for this type and route; enter the price.* Tick `Custom` and type the price.
3. **Quantity and supplier**
   `Qty`, `Service Provider`, `Commission`.
4. **Vehicle**
   `Vehicle`, `Driver`, `Driver phone`, `Plate` if known.
5. **Add and save**
   Click `Add` for each trip. Check `Total Cost`, `Total Price`, `Total Commission`, `Profit`. Click `Save`.

Part C — Transport requests (self hotel)

When a guest books their own hotel, staff log the pick-up at **Umrah → New Transport Request**.

New Transport Request

1. **Booking**

Choose **Booking:**. **Customer:** fills.

2 **Pick-up**

Checkout: date, **Hotel:**, **Room No:**, **Contact Person:**, **Contact No:**.

3 **Trip**

Sector:, **PAX:**, **Next Hotel:**, **Status:**.

4 **Notes**

Customer Notes:, **KSA Notes:**. Click **Save** or **Save & New**.

Part D — Outsource trips and dispatch

Outsource Trip

1 Trip

Open **Transports → New Outsource Trip**. Set `Trip Date / Time:`, `Route:`, `Vehicle Type:`, `Status:`, `Notes:`.

2 Who drives

`Transporter:` or `Service Provider:`, `Vehicle:`, `Driver / Phone:`, `Vehicle plate:`, `Seats:`.

3 Cost

`Currency:` (SAR/PKR), `Cost SAR :`, `Commission:`, `Exchange Rate (PKR per SAR) :`.

4 Attach vouchers

Tick `Same route` / `Same vehicle type`, click `Find`, tick vouchers and `Attach selected`. `Detach` removes one. Click `Save`.

Dispatch Board

1 Day view

Open **Transports → Dispatch Board**. Click `Today`; filter `City`, `Transporter`, `Vehicle type`, `Status` (Unassigned, Assigned, Completed, Cancelled).

2 Views

Switch `Board` / `Table`; `Excel`, `Print`, `Refresh`. Tick `Auto-refresh 60s`.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Routes

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Route Name *	Unique name.	Yes
Full Title	Defaults to name.	No
From / To City / Sector	Ends.	No
Default Rate (SAR)	Not negative.	No
Arrival / Departure / Inter City / Ziyarat	Kind.	No

Vehicles & Types

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Type Name *	Transport type.	Yes
Capacity	Not negative.	No
Vehicle Name / Plate / Number	One is needed.	Yes
Seats	Not negative.	No
Driver / Driver Mobile	Driver.	No

Transport Rates

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Route *	Route.	Yes
Vehicle Type *	Type.	Yes
Transporter / Customer Type	Optional filters.	No
Sale (SAR) / Cost (SAR)	At least one.	Yes
Valid From / Valid To	From not after To.	No

Transport Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Voucher Date:	Date.	Yes
Transporter:	Transporter.	Yes
Customer:	Customer.	Yes
Voucher Status:	Status.	Yes
Guest Name:	Guest.	Yes
PAX:	Passengers.	Yes
Exchange Rate (PKR per SAR) :	Rate.	Yes
Trip: Travel Date / Time / Transport Type / Route	Each trip.	Yes
Unit Price / Qty / Unit Cost	Prices.	No

Outsource Trip

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Trip Date / Time:	When.	Yes
Route:	Route.	Yes
Transporter: / Service Provider:	Who.	Yes
Status:	Draft, Confirmed, Completed, Cancelled.	Yes
Exchange Rate	Rate.	Yes
Seats / Cost / Commission	Not negative.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find vouchers	**Transport Voucher List**: number or guest, customer, dates, status, transporter, type, route; tick Needs vehicle.
Find trips	**Outsource Trips** by date, transporter, status.
Intimation	**Transport Intimation Report**: Yesterday / Today / Custom, Show Summary, Print, CSV.
Requests	**Transport Requests** (Umrah → Request List).

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.

Setup

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter the route name.	Type **Route Name *** .
Another route is already named ...	Use another name.
Please enter the vehicle name or plate number.	Type one.
Another vehicle already has plate / number ...	Check the plate.
Please enter the type name.	Type **Type Name *** .
Please select the route.	Choose **Route *** .
Please select the vehicle type.	Choose **Vehicle Type *** .
Please enter the sale or cost price.	Type a price.
Valid From cannot be after Valid To.	Fix dates.

Transport voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please set voucher date.	Set **Voucher Date:** .
Please select transporter.	Choose it.
Please select customer.	Choose it.
Please enter guest name.	Type it.
Please enter Pax.	Type **PAX:** .
Please enter exchange rate.	Type the rate.
Please add at least one trip.	Click **Add** .
Please select travel date. (trip ...	Fill that trip.
You are not allowed to confirm service (transport) vouchers.	Save as Reserved.

Requests and trips

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter the Checkout date.	Set **Checkout:**.
Enter the Hotel.	Set **Hotel:**.
Enter the Contact No.	Type it.
Select a valid Sector.	Choose **Sector:**.
Please set the trip date.	Set the date.
Please select the transporter or service provider.	Choose one.
Seats and amounts cannot be negative.	Fix values.

SECTION 7

7 Quick checklist

Setup

- [ ] Routes with kinds
- [ ] Types and vehicles
- [ ] Rates per route and type

Day of travel

- [ ] Vehicles assigned
- [ ] Outsource trips attached
- [ ] Dispatch Board has no Unassigned

Voucher

- [ ] Transporter and customer
- [ ] Guest and PAX
- [ ] Every trip with date, time, type, route
- [ ] Totals checked

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 8 — Ticketing & Ticket Inventory

Issue ticket invoices, record refunds, keep group seat inventory and book passengers on ticket groups.

TRAINING GUIDE · SIMPLE ENGLISH

TICKET INVOICE | REFUND | INVENTORY | GROUP BOOKING | DAILY SALE | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Ticketing & Ticket Inventory** 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

Ticketing covers airline tickets. A **Ticket Invoice** bills a customer for one or more tickets on a PNR. A **Ticket Refund** reverses a ticket. **Ticket Inventory** holds group seats bought from an airline or supplier, and **Group Booking** sells those seats to customers.

MENU PATH

Tickets (top menu) → **New Ticket Invoice** (menu item)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Tickets → Invoices	Ticket Dashboard · New Ticket Invoice · Ticket Lists
Tickets → Refunds	New Ticket Refund · Ticket Refund Lists
Tickets → Groups	Ticket Inventory · Search Group · Umrah Group Tickets · Ticket Booking List · Daily Sale · Group Dashboard

HOW THE WORK FLOWS

Inventory (Seats on a PNR) → **Book** (Group booking or invoice) → **Invoice** (Tickets, fares, accounts) → **Refund** (If cancelled)

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
Customer	Admin → New Customer	**Customer:** on every invoice and booking.
Airline / supplier accounts	Chart of Accounts / Admin Backend	**Ticket Airline:**, **Airline:** or **Service Provider:** (the payable).
Exchange rate	SAR rates	**Exchange Rate (PKR per SAR):**.
Posting right	Roles & Permissions	Without it you can only save as Draft.

SECTION 3

3 Step-by-step data entry

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

Part A — New Ticket Invoice

Open **Tickets → New Ticket Invoice**. The page is **Ticket Invoice**.

Ticket Invoice — header

1 Invoice
`Invoice No:` is given on save. Choose `Invoice Date:` and `Customer:`. Add `Order Reference:` and `Note:`.

2 Status
Choose `Invoice Status:`. Save as Draft if you are not allowed to post.

Ticket Invoice Details — a ticket

1 Airline and PNR
Choose `Ticket Airline:`, `Issue Date:`, type `PNR:`.

2 Payable account
Choose **one** payable: `Airline:` **or** `Service Provider:`, not both.

3 Sectors
Click `Add Sector` and fill Flight No., From, To, Departure, Time, Arrival, Baggage, Class, RBD. Choose `Route Type:`.

4 Passenger
Type `Ticket Number:` (format ___-____-___-__), `Title:`, `Surname:`, `Given Name:`, `CNIC:`, `PAX:`, `Passport No:`, `Expiry Date:`, `Nationality:`.

5 Airline side
Type `Basic Fare:`, `Air Comm (%):`, `Taxes:`, `Air WH (%):`, `Airline Charges:`. `Airline Payable:` is calculated.

6 Customer side
Type `Charges:`, `Customer WH (%):`, `Discount (%):`. `Customer Receivable:` and `Profit/Loss:` are calculated.

7 **Add the ticket**
Click **Add Ticket**. Repeat for each passenger. **Copy** copies a ticket line.

Ticket Invoice — totals and save

1 **Check totals**
Net Cost (PKR):, **Net Sale (PKR):**, **Profit/Loss (PKR):** and the SAR equivalents.

2 **Save**
Click **Save**. Use **Print** for the invoice.

> ⚠ **WARNING**
> *You are not allowed to post ticket invoices; save as Draft.* means your role cannot post. Save as Draft and ask a manager.

Part B — Ticket Refund

Open **Tickets → New Ticket Refund**.

Ticket Refund

1 Refund
Refund No: shows *Auto*. Choose Refund Date: and Refund Status:.

2 Ticket
Choose the Ticket:. Passenger, Customer:, PNR:, Invoice No: fill from the invoice.

3 Account
Choose the one Airline: or Service Provider: the ticket was bought from.

4 Amounts
Fill Basic Fare:, Taxes:, Airline Charges:, Air Comm (%):, Air WH (%): → Airline Receivable:; then Charges:, Customer WH (%):, Discount (%): → Customer Payable:.

5 Save
Click Save, then Print. Refund List opens the list.

Part C — Ticket Inventory (group seats)

Open **Tickets → Ticket Inventory** and click Add New.

Ticket Inventory form

1 Header
Airline *and* *PNR* are **required**. Tick Active.

2 Sector & Flights
Sector From, Sector To, outbound and return flight no, date, departure and arrival (HH:MM), Baggage.

3 Sale prices
Adult Price, Child Price, Infant Price (ticket only).

4 Seats
Total Seats. Split with Max Ticket-Only Seats and Max Umrah Seats. Held, Sold and Available update by themselves.

5 **Purchase cost**

Service Provider, Cost Currency, Cost Exchange Rate (PKR per SAR), Cost per Seat, Infant Cost (per infant). Total Purchase Cost (PKR) is calculated.

6 **Save**

Add Notes. Click Save, Save and Close or Save and New. You see *Saved successfully*.

NOTE

The **Ledger Posting** block shows Ledger Status, Posted Amount (PKR) and Posted On for the purchase.

Part D — Book seats on a group

Search Group

1 Find
Open **Tickets → Search Group**. Filter by `Sector`, `Travel Date`, `Category`, `Airlines` or search text.

2 Select
Click `SELECT` on a group with seats (FULL means no seats).

Group Booking

1 Reservation
Choose `Customer` and `Family Head`; type `Adults`, `Childs`, `Infants`.

2 Passengers
Fill each row: Pax Type, Title, Passport No, Surname, Given Name, DOB, Passport Expiry.

3 Register
Click `Register`. Later `Confirm` or `Cancel Booking`.

Customer website (Umrah Group Tickets)

1 Book
Agents use **Book Ticket Seats**: `Customer`, *contact, passengers (Surname* , Passport No , *Date of Birth*), then `Send Booking Request`.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Ticket Invoice

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Invoice Date:	Date.	Yes
Customer:	Who pays.	Yes
Invoice Status:	Draft or posted.	Yes
Ticket Airline:	Airline.	Yes
Issue Date:	Ticket issue.	Yes
PNR:	Booking ref.	Yes
Airline: / Service Provider:	Exactly one payable.	Yes
Ticket Number:	Unique per invoice.	Yes
Surname: / Given Name:	At least one.	Yes
Basic Fare: / Taxes: / Charges:	Amounts.	No
Airline Payable: / Customer Receivable: / Profit/Loss:	Calculated.	Auto

Ticket Refund

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Refund Date:	Date.	Yes
Ticket:	Ticket refunded.	Yes
Airline: / Service Provider:	Exactly one.	Yes
Amounts	Not negative.	No
Airline Receivable: / Customer Payable:	Calculated.	Auto

Ticket Inventory

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Airline *	Airline.	Yes
PNR *	PNR.	Yes
Sector / flights / dates	Route.	No
Adult / Child / Infant Price	Sale.	No
Total Seats / Max Ticket-Only / Max Umrah	Seat pool.	No
Service Provider / Cost per Seat	Purchase.	No
Held / Sold / Available	Calculated.	Auto

Group Booking

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer	Who books.	Yes
Adults / Childs / Infants	At least one adult.	Yes
Passenger rows	One per seat.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find invoices	**Tickets → Ticket Lists**: search by Invoice, PNR or Ticket No, customer, dates, status.
Find refunds	**Tickets → Ticket Refund Lists**.
Inventory	**Ticket Inventory** list shows Total Seats, Held, Sold, Available; **Show in Excel**.
Group bookings	**Ticket Booking List**.
Daily sale	**Daily Sale**: **Start Date**, **End Date**, **Show**.

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.

Ticket invoice

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please Select Invoice Date!	Choose **Invoice Date:**.
Please Select Customer!	Choose **Customer:**.
Please Select Ticket Airline!	Choose **Ticket Airline:**.
Please Select Issue Date!	Choose **Issue Date:**.
Please Enter PNR!	Type **PNR:**.
Please enter the Ticket Number.	Type it.
Please enter the passenger Surname or Given Name.	Type a name.
Please add at least one ticket	Click **Add Ticket**.
Please Select one Payable Account (Airline or Service Provider)!	Choose one.
Please Select only one Payable Account (Airline or Service Provider)!	Clear one.
Ticket number already used on another invoice: ...	Check the number.
No seats left on PNR ...	Inventory is full.
These tickets have a refund and cannot be removed: ...	Refunded tickets stay.

Refund

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please Select Refund Date!	Choose the date.
Please Select Ticket!	Choose **Ticket:**.
Refund amounts cannot be negative.	Fix amounts.
You are not allowed to post refunds; save as Draft.	Save as Draft.

Group booking

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
At least one adult is required.	Add an adult.
Each infant must travel with an adult.	Fix counts.
This group is locked for booking.	Choose another group.
This group has already departed.	Choose a future group.
A confirmed booking cannot be set back to Reserved.	Cancel instead.
Start Date cannot be after End Date.	Fix Daily Sale dates.

SECTION 7

7 Quick checklist

Invoice

- [ ] Date, customer, airline, PNR
- [ ] One payable account
- [ ] Every ticket added with fares
- [ ] Totals checked
- [ ] Printed

Refund

- [ ] Ticket chosen
- [ ] Same supplier account
- [ ] Amounts checked

Inventory & groups

- [ ] Airline and PNR
- [ ] Seats and prices
- [ ] Purchase cost
- [ ] Passengers complete before Register

Trainee name

Date

Trainer

DATA ENTRY TRAINING

Arch Travel CRM

Module 9 — Services

Bill customers for any extra service, such as visas, insurance or ziarat, with price lines and cost lines.

TRAINING GUIDE · SIMPLE ENGLISH

SERVICE INVOICE | PRICE LINES | COST LINES | SERVICE LIST | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Services** 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

A **Service Invoice** bills a customer for a service that is not a ticket, hotel or transport, such as a visa, insurance or ziarat. **Price lines** are what the customer pays. **Cost lines** are what you pay the service provider. The difference is your profit.

MENU PATH

Accounts
top menu
→
New Service Invoice
menu item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Accounts	New Service Invoice · Service List
Admin Backend → Services	Services · Service Types · Service Sale List · Service Cost List

HOW THE WORK FLOWS

Header
Customer, guest, currency
→
Price lines
What the customer pays
→
Cost lines
What the supplier charges
→
Save
Unposted / Posted

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
Service types	Admin Backend → Services → Service Types	**Service Type** on each line.
Customer	Admin → New Customer	**Customer:** .
Service provider	Supplier accounts	**Service Provider:** for cost.
Exchange rate	SAR rates	**Ex Rate:** .

SECTION 3

3 Step-by-step data entry

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

Part A — New Service Invoice

Open **Accounts → New Service Invoice**. The page is **Service Invoice**.

Service Invoice — header

1 Invoice
`Invoice No:` is *Created on save*. Set `Invoice Date:`.

2 Customer and guest
Choose `Customer:`. Type `Inv/Ref No:`, `Guest Name:` and `Description:`.

3 Currency
Choose `Currency:` and type `Ex Rate:`.

4 Status
Choose `Status:`: Unposted, Posted or Void.

5 Supplier
Choose `Service Provider:`. Tick `Custom Commission:` to type your own `Commission:`.

Price lines

1 Add a price line
Choose `Service Type`, type `Detail` and `Amount`. Click `Add`. `X` removes a line.

Cost lines

1 Add a cost line
Choose `Service Type`, `Detail`, `Amount`, `Service Provider`, `Currency` and `Ex Rate`. Click `Add`.

2 Save
Check totals and click `Save`. `Reset` clears the form.

> ⚠ **WARNING**
> If the invoice already has payments, the system warns you (*This invoice has payments of …*). Check with accounts before changing it.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Header

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Invoice Date:	Date.	Yes
Customer:	Who pays.	Yes
Inv/Ref No:	Reference.	Yes
Guest Name:	Guest.	Yes
Description:	What the service is.	Yes
Currency: / Ex Rate:	Currency and rate.	Yes
Status:	Unposted / Posted / Void.	Yes
Service Provider:	Supplier.	Yes
Custom Commission: / Commission:	Own commission.	No

Price line

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Service Type	Type.	Yes
Detail	Text.	No
Amount	Sale amount.	Yes

Cost line

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Service Type	Type.	Yes
Service Provider	Supplier.	Yes
Amount / Currency / Ex Rate	Cost.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find invoices	**Accounts → Service List**: invoice no, ref no or guest, customer, dates, status (Draft, Final, Void); Search, Export.
Reports	Admin Backend **Service Sale List** and **Service Cost List** (read only).

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.

Service invoice

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please set invoice date.	Set the date.
Please select customer.	Choose **Customer:**.
Please enter Ref No.	Type **Inv/Ref No:**.
Please enter Guest Name.	Type it.
Please enter description.	Type it.
Please select service provider.	Choose it.
Please enter exchange rate.	Type **Ex Rate:**.
Please add at least one price line.	Add a price line.
Please select service type. (price line ...	Fix that line.
Please select service provider. (cost line ...	Fix that line.
Service invoices are available to staff users only.	Use a staff login.
Invoice Date From cannot be after Invoice Date To.	Fix list dates.

SECTION 7

7 Quick checklist

Every invoice

- [ ] Customer, ref no, guest, description
- [ ] Currency and rate
- [ ] At least one price line
- [ ] Cost lines with provider
- [ ] Status chosen
- [ ] Saved

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 10 — Accounts & Finance

Chart of accounts, opening balances, quick and full vouchers, ledgers, statements and SAR rates.

TRAINING GUIDE · SIMPLE ENGLISH

CHART OF ACCOUNTS | OPENINGS | QUICK VOUCHER | NEW VOUCHER | LEDGERS | SAR RATES | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Accounts & Finance** 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

Accounts & Finance holds your chart of accounts and every money entry. Bookings, tickets and services post to the ledger automatically when they are approved. You enter receipts, payments and journal entries yourself with **Quick Voucher** or **New Voucher**, then check them in the ledgers and statements.

MENU PATH

Accounts top menu → **Financial Vouchers** menu group → **Quick Voucher** or New Voucher by Type

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Accounts Setup	**Chart of Accounts** **Opening List**
Financial Vouchers	**Quick Voucher** **Accounts Voucher List**
New Voucher by Type	**Bank Payment (BP)** **Bank Receipt (BR)** **Cash Payment (CP)** **Cash Receipt (CR)** **Journal Voucher (JV)** **Receipt/Payment (RP)**
Ledgers & Statements	**General Ledger / Account** **Customer Ledger** **Supplier / Vendor Statement** **Unreconciled Entries**
Financial Statements	**Trial Balance** **Profit & Loss** **Balance Sheet** **Day Book**
Admin → System Functions	**Account Posting** (re-post bookings)
Admin Backend → Accounts → Setup	**SAR Rates** **Financial Settings**

HOW THE WORK FLOWS

Chart of Accounts Accounts exist → **Opening balances** Start figures → **Vouchers** Receipts, payments, journals → **Ledgers** Check and reconcile → **Statements** Trial Balance, P&L, Balance Sheet

NOTE
Only **Final** vouchers affect balances. A **Draft** voucher is saved but not posted.

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
Chart of Accounts	Accounts → Accounts Setup → Chart of Accounts	Every voucher line needs an account. Only accounts at level **4 - Detail** take transactions.
Branches	Admin Backend → System → Branch	Every voucher needs a **Branch:**.
Departments	Admin Backend → System → Departments	Optional **Department:** on New Voucher.
Categories	Admin Backend → Accounts → Setup → Categories	Optional **Category:** on voucher lines and ledger filter.
SAR Rates	Admin Backend → Accounts → Setup → SAR Rates	Exchange rate between PKR and SAR used by bookings and vouchers.
Financial Settings	Admin Backend → Accounts → Setup → Financial Settings	Default sale, cost, cash and bank accounts used by automatic posting.
Your rights	Admin → Roles & Permissions; employee record	Cash/bank vouchers, back-dated vouchers, posting as Final and other branches need rights.

SECTION 3

3 Step-by-step data entry

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

Part A — Add an account to the Chart of Accounts

Open **Accounts → Accounts Setup → Chart of Accounts**. The tree shows levels 1 Header, 2 Master, 3 Control and 4 Detail.

Chart of Accounts — Add Account

1 Find the parent
Use `Search code / name`, `Nature` and `Show levels up to` to find the parent account. `Expand all` opens the whole tree.

2 Click Add Account
Click `Add Account`. A form opens.

3 Parent Account
Choose the `Parent Account *`. **Required.** The new account is created under it.

4 Account Code
Type the `Account Code` (for example 101010). It must be unique.

> TIP
> Follow the numbering of the other accounts under the same parent.

5 Account Description
Type the account name in `Account Description *`. **Required.**

6 Nature, Type and Transaction Type
Choose `Account Nature` (Assets, Equity, Expenses, Liabilities, Revenue), `Account Type` and `Transaction Type` (Credit or Debit).

7 Transaction Allowed and Branch
Set `Transaction Allowed` to **Yes** for an account that takes entries. Choose the `Branch` if the account belongs to one branch.

8 Save
Click `Save`. The message starts with *Saved account ....*

Part B — Enter opening balances

Open **Accounts → Accounts Setup → Opening List**.

Opening List — Add New

1 Search first
Choose `Account:` or `Branch:` and click `Search` to see existing openings.

2 Add New
Click `Add New`.

3 Account and Branch
Choose `Account:` (**required**) and `Branch:`.

4 Currency and Exchange Rate
Choose `Currency:` PKR or SAR and enter `Exchange Rate:`. Both are required.

5 Debit or Credit
Type the amount in `Debit:` **or** `Credit:`, not both.

> ⚠ **WARNING**
> *Enter either Debit or Credit, not both.*

6 Add
Click `Add`. To change a row, open it and click `Update`.

Part C — Quick Voucher (receive or make a payment)

Open **Accounts → Financial Vouchers → Quick Voucher**. Use it for a simple receipt or payment with one cash/bank account and one party account.

Quick Voucher

1 Voucher Type
Choose `Receive Payment` or `Make Payment` under `Voucher Type:`.

2 Date, Status and Branch
Set `Voucher Date:` (dd/MM/yyyy), `Status:` **Final** or **Draft**, and `Branch:`.

3 Invoice/Ref and Cash Flow
Type an optional `Invoice/Ref:`. Choose `Cash Flow:` (for example Receipts or Payments).

4 Cash/Bank
Choose the `Cash/Bank:` account the money goes into or out of. **Required.**

5 Account
Choose the party in `Account:` (customer, supplier or other ledger). **Required.**

6 Against Invoice
Pick an invoice in `Against Invoice:`, or keep -- *Direct Payment / No Invoice* --. To split one amount over many invoices click `Auto Allocate Amount` or fill `Paying Amount` in **Adjust Multiple / Partial Invoices**, then `Apply & Close`.

7 Currency, Amount and Ex.Rate
Choose `Currency:`, type `Amount:` (more than zero) and `Ex.Rate:`. The SAR value is shown.

8 Description and Save
Write the `Description:` and click `Save`. Use `Print Voucher` to print it. `Reset` clears the form.

Part D — New Voucher by type (BP, BR, CP, CR, JV, RP)

Open **Accounts → New Voucher by Type** and choose the type. Use it for vouchers with many lines, such as a Journal Voucher.

New Voucher — Voucher Details

1 Header
`Voucher No:` is generated. Check `Voucher Type:`, set `Voucher Date:`, `Branch:` (**required**), `Department:` and `Currency:` (PKR, SAR, USD or AED).

2 **Description and Status**

Write **Voucher Description:**. Choose **Voucher Status:** **Final** or **Draft**. Link a **Booking:** only if the voucher belongs to one.

3 **Add a line**

Click **Add Transaction**. Choose **Account:**, optional **Category:** and **Cash Flow:**, type **Particulars:** and **Inv/Ref No:**.

4 **Debit or Credit**

Type the amount in **Debit:** or **Credit:** and the **Exchange Rate:**. Click **Add**. Use **Update** after editing a line.

5 **Balance the voucher**

Add lines until total debit equals total credit.

6 **Save and print**

Click **Save**. Click **Print Voucher** to print.

⚠ **WARNING**

A Final voucher must balance: *Voucher is out of balance. Total Debit (...) must equal Total Credit (...) to post as Final.*

Part E — Ledgers, statements and reconciliation

Ledgers and statements

1 Account Ledger

Accounts → General Ledger / Account. Choose **Account**, **Period**, **Branch**, **Currency** and click **Apply**. Print with **Print**, **Excel** or **CSV**.

2 Customer Ledger

Customer Ledger: choose **Customer:**, **Start Date:**, **End Date:**, **Currency:** and click **Show**.

3 Supplier Statement

Supplier / Vendor Statement: choose **Supplier / Vendor Account**, **From Date**, **To Date** and click **Generate**.

4 Trial Balance

Trial Balance: choose **Branch**, **Currency**, **Period** and **Account levels**, then **Apply**.

5 Unreconciled Entries

Lists postings that do not match their source document. Filter by **Period**, **Party (customer)**, **Module / type**, **Issue type** and click **Apply**. Users with the right can use **Sync / Fix Posting** or **Post reversal**.

6 Account Posting

Admin → Account Posting re-posts old documents. Set **Customer:**, **Booking/Voucher Number:**, dates and **Password:**, then click **Post Bookings**, **Post Star** or **Post Group Reservations**.

> ⚠ **WARNING**
> Use Account Posting only when your accountant asks.

Part F — SAR Rates (Admin Backend)

Open the Admin Backend, menu **Accounts → Setup → SAR Rates**, and click **New**.

SAR Rates

1 Currency and Rate

Enter **Currency** (for example PKR) and **Rate** (how many units equal 1 SAR).

2 Dates

Enter **Effective Date** and, if the rate ends, **Cease Date**.

3 **Limit the rate (optional)**

Fill **Customer Type**, **Customer**, **Service Provider**, **IATA** or **Hotel** only if this rate is for them.

4 **Is Active and save**

Tick **Is Active** and click **Save**.

NOTE

If no SAR rate matches, bookings use rate 1. Keep one active general rate.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Chart of Accounts — Add Account

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Parent Account *	The account above this one.	Yes
Account Code	Unique code, e.g. 101010.	Yes
Account Description *	Account name.	Yes
Account Nature	Assets, Equity, Expenses, Liabilities or Revenue.	No
Account Type	Type from the list.	No
Transaction Type	Credit or Debit.	No
Transaction Allowed	Yes for accounts that take entries.	No
Branch	Branch of the account.	No

Opening List

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Account:	Detail account.	Yes
Branch:	Branch.	No
Currency:	PKR or SAR.	Yes
Debit: / Credit:	One amount, not both. Not negative.	Yes
Exchange Rate:	Rate for the currency.	Yes

Quick Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Voucher Type:	Receive Payment or Make Payment.	Yes
Voucher Date:	dd/MM/yyyy.	Yes
Status:	Final or Draft.	Yes

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Branch:	Branch.	Yes
Invoice/Ref:	Optional reference.	No
Cash Flow:	Cash flow head.	No
Cash/Bank:	Cash or bank account.	Yes
Account:	Party / ledger account.	Yes
Against Invoice:	Invoice or Direct Payment.	No
Currency: / Amount: / Ex.Rate:	Amount above zero and a valid rate.	Yes
Description:	Narration.	No

New Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Voucher No:	Auto Generated.	Auto
Voucher Type:	JV, BP, BR, CP, CR.	Yes
Voucher Date:	Date. Back dates need a right.	Yes
Branch:	Your branch.	Yes
Department:	Optional.	No
Currency:	PKR, SAR, USD or AED.	Yes
Voucher Description:	Remarks.	No
Voucher Status:	Final or Draft.	Yes
Booking:	Linked booking or Direct.	No
Account: (line)	Chart of account for the line.	Yes
Category: / Cash Flow: / Particulars: / Inv/Ref No:	Line details.	No
Debit: / Credit: (line)	One amount above zero.	Yes
Exchange Rate: (line)	Rate.	Yes

SAR Rates (Admin Backend)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Currency	e.g. PKR.	Yes

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Rate	Units per 1 SAR.	Yes
Effective Date / Cease Date	Start and end.	No
Customer Type / Customer / Service Provider / IATA / Hotel	Limit the rate.	No
Is Active	Tick to use.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find a voucher	**Accounts → Accounts Voucher List**. Filter by Voucher No:, Voucher Description:, Voucher Type:, Branch:, Date From:, Date To:, Booking Status: (Posted / Draft) and click Search.
Edit or print	Use the Action button on the row to open, print or see attached documents.
Check balances	Use Account Ledger, Customer Ledger, Supplier Statement and Trial Balance (Part E).
Export	Ledgers and Trial Balance have Print, Excel and CSV.

TIP
Posted automatic vouchers (bookings, tickets, services) are changed from their own module, not from New Voucher.

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.

Chart of Accounts and Opening

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Account Code is required.	Type an **Account Code**.
Account Description / Title is required.	Type the **Account Description ***.
Please select Account to continue!	Choose **Account:**.
Please enter Currency to continue!	Choose **Currency:**.
Please enter Exchange Rate to continue!	Type the rate.
Please enter Debit or Credit to continue!	Type one amount.
Enter either Debit or Credit, not both.	Clear one of the two boxes.
Debit and Credit cannot be negative.	Use positive amounts.

Quick Voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter a valid Voucher Date.	Use dd/MM/yyyy.
Please select a Branch.	Choose **Branch:**.
Please select a Cash/Bank Account.	Choose **Cash/Bank:**.
Please select a Ledger / Party Account.	Choose **Account:**.
Please enter a valid Amount greater than zero.	Type an amount above 0.
Please enter a valid Exchange Rate.	Type the rate.
Both Cash/Bank account and Ledger account must be selected.	Fill both accounts.

New Voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select an Account for this transaction line.	Choose the line **Account:**.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter either a Debit or Credit amount greater than zero.	Type one amount.
Please add at least one transaction line before saving.	Click **Add Transaction** first.
Voucher lines must contain debit and credit amounts greater than zero.	Remove empty lines.
Voucher is out of balance. Total Debit (...) must equal Total Credit (...) to post as Final.	Balance the voucher or save as Draft.
Cash / bank vouchers are not enabled for your account.	Ask for the right, or use JV.
You are not allowed to post ... vouchers as Final; save as Draft.	Save as Draft. A senior user posts it.
You are not allowed to save back-dated vouchers.	Use today's date or ask for the right.
You can only save vouchers for your own branch (...	Choose your own branch.

Ledgers

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select an account.	Choose **Account** then **Apply**.
Please select Start Date and End Date.	Fill the period.
Select a Customer then Show.	Choose **Customer:**.
Please select a supplier account.	Choose the supplier.
You do not have permission to run Sync / Fix Posting (...	Ask an accountant with the right.

SECTION 7

7 Quick checklist

Setup

- [ ] Chart of Accounts has the detail accounts
- [ ] SAR rate is active
- [ ] Opening balances entered once

Before Final

- [ ] Debit equals credit
- [ ] Linked invoice or booking correct
- [ ] Draft only when not sure

Every voucher

- [ ] Correct type and date
- [ ] Branch chosen
- [ ] Cash/Bank and party account correct
- [ ] Amount and exchange rate checked
- [ ] Description written

Month end

- [ ] Customer and supplier ledgers checked
- [ ] Unreconciled Entries reviewed
- [ ] Trial Balance printed

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 11 — HR & Payroll

Departments and positions, employee records, attendance, leaves, advances and loans, and monthly payroll.

TRAINING GUIDE · SIMPLE ENGLISH

SETUP | EMPLOYEES | ATTENDANCE | LEAVES | ADVANCES | PAYROLL | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **HR & Payroll** 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

HR & Payroll keeps your staff records and pays salaries. Set up departments, positions and holidays first, add each employee, mark attendance and leaves during the month, record advances and loans, then generate and post the payroll.

MENU PATH

HR
top menu → **Employees / Attendance / Leaves / Payroll**
menu items

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
HR	HR Dashboard · Employees · Setup (Departments, Positions, Holidays)
HR	Attendance · Leaves · Payroll · Advances & Loans
Admin Backend → HR Management	Employee (staff login and rights)

HOW THE WORK FLOWS

Setup
Departments, positions, holidays
→ **Employees**
Profile, job and salary
→ **Month**
Attendance, leaves, advances
→ **Payroll**
Generate, approve & post, pay

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
Branches	Admin Backend → System → Branch	**Branch** on the employee.
Salary accounts	Accounts → Chart of Accounts	**Salary Expense A/C**, **Salary Payable A/C** and **Advance Against Salary A/C**.
Cash / payment account	Chart of Accounts	**Payment Account** for advances.
HR settings	Admin Backend → HR Management → Settings	Leave allowances and payroll defaults.

SECTION 3

3 Step-by-step data entry

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

Part A — HR Setup: departments, positions, holidays

Open **HR → Setup (Departments, Positions, Holidays)**. Click **New** on the list you need.

HR Setup

1 Add Department
Type **Department *** (**required**), optional **Code** and **Description**. Tick **Active**. Click **Save**.

2 Add Position
Type **Position *** and choose its **Department**. Click **Save**.

3 Add Holiday
Type **Holiday**, ***From*** and **To**. Click **Save**.

Part B — Add an employee

Open **HR → Employees** and click **New Employee**. The form is **Add Employee**.

Add Employee

1 Profile
Employee Code (unique), **Full Name *** (**required**), **Father Name**, **Gender**, **Marital Status**, **Date of Birth**, **CNIC / ID No.**, **Blood**.

2 Job
Department, **Position**, **Supervisor** (not the same person), **Branch**, **Joining Date**, **Leaving Date**.

3 Salary
Basic Salary, **Gross Salary** (basic + allowances, not less than basic), **Currency**.

4 Accounts
Salary Expense A/C, **Salary Payable A/C**, **Advance Against Salary A/C**.

5 Contact
Mobile, **Office Mobile**, **Email**, **City**, **Country**, **Address**, **Emergency Contact**, **Emergency Phone**, **Relation**.

6 **Save**

Tick **Active** and click **Save**.

NOTE

Staff logins and the rights *Allow Final Booking* / *Allow Final Hotel Voucher* are on the employee record in the Admin Backend (HR Management → Employee).

Part C — Attendance and leaves

Attendance

1 Daily Sheet
Choose **Date** and **Department**, click **Load**. Mark each employee, use **Apply** to set many at once, then **Save Sheet**.

2 Monthly Register
Choose **Month** and click **Show** to see the month.

Leaves

1 Apply Leave
Click **New**. Choose **Employee**, ***Leave Type***, **From *** and **To**. **Days** is filled (whole or half days). Add **Reason / Notes**. Click **Submit**.

2 Approve or reject
In **Leave Applications** find the leave (**Search**) and click **Approve**, **Reject** or **Cancel**.

3 Leave Balance
Check the balance before approving.

Part D — Advances and loans

New Advance / Loan

1 Employee and kind
Click **New**. Choose **Employee *** and **Kind** (Advance or Loan) and **Date**.

2 Amount and recovery
Type **Amount *** and the **Monthly** installment (between 0 and the amount). Choose **Recover From**.

3 Payment account
Choose the **Payment Account** (default: Configured cash account). Add **Notes**. Click **Save**.

Part E — Monthly payroll

Payroll

1 Choose month
Choose `Month`, optional `Department` and `Status`, click `Show`.

2 Generate Drafts
Click `Generate Drafts`. One Draft slip per employee is made.

3 Check slips
Open a slip, change amounts if needed and click `Save Draft`. Amounts cannot be negative.

4 Approve & Post
Tick the slips and click `Approve & Post`. The salary is posted to accounts.

5 Mark Paid
After paying, tick the slips and click `Mark Paid`. `Reopen to Draft` reverses a mistake; `Cancel` cancels a slip.

6 Print
Open a slip and click `Print` for the salary slip.

⚠ **WARNING**
Only Draft slips can be edited. Reopen it first.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

HR Setup

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Department *	Department name, unique.	Yes
Code / Description	Optional.	No
Position *	Position title, unique.	Yes
Holiday *	Holiday title.	Yes
From * / To	To not before From.	Yes

Add Employee

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Employee Code	Unique code.	No
Full Name *	Name.	Yes
Father Name / Gender / Marital Status / Date of Birth / CNIC / ID No. / Blood	Personal.	No
Department / Position / Supervisor / Branch	Job.	No
Joining Date / Leaving Date	Leaving not before joining.	No
Basic Salary / Gross Salary	Not negative; gross not less than basic.	No
Currency	Salary currency.	No
Salary Expense A/C / Salary Payable A/C / Advance Against Salary A/C	Accounts.	No
Mobile / Office Mobile / Email / City / Country / Address	Contact.	No
Emergency Contact / Emergency Phone / Relation	Emergency.	No
Active	Tick for current staff.	No

Leaves

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Employee *	Employee.	Yes
Leave Type *	Type.	Yes
From *	Start date.	Yes
To	Not before From.	No
Days	Whole or half days.	Auto
Reason / Notes	Reason.	No

Advances & Loans

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Employee *	Employee.	Yes
Kind	Advance or Loan.	No
Date	Date.	No
Amount *	Amount.	Yes
Monthly	Installment, 0 to amount.	No
Recover From / Payment Account / Notes	Details.	No

Payroll

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Month	Payroll month.	Yes
Department / Status	Filters.	No
Notes (slip)	Notes.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find an employee	**Employees**: filter by department, position and status; click **Search**.
Edit	Open the employee, change, **Save**.
Outstanding advances	**Advances & Loans → Outstanding by Employee**. **Close**, **Cancel** or **Reopen** an advance.
Salary slips	**Payroll → Salary Slips** by month and status (Draft, Approved, Paid, Cancelled).

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.

Setup and employees

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter the department name.	Type **Department *** .
Please enter the position title.	Type **Position *** .
Please enter the holiday title.	Type **Holiday *** .
End date cannot be before the start date.	Fix the dates.
Please enter the employee name.	Type **Full Name *** .
Salary cannot be negative.	Fix the salary.
Gross salary cannot be less than basic salary.	Raise gross or lower basic.
Leaving date cannot be before the joining date.	Fix the dates.
Another employee already has code ...	Use another code.
An employee cannot supervise themselves.	Choose another supervisor.

Attendance and leaves

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select the date.	Choose **Date** .
Attendance cannot be marked more than a month ahead.	Use a nearer date.
Please select the employee.	Choose the employee.
Please select the leave type.	Choose **Leave Type *** .
Days must be whole or half days.	Use .0 or .5.
Split a leave that crosses the year end into two applications.	Make two leaves.
This employee already has a pending / approved leave (#...	Check the existing leave.
Only pending leaves can be approved.	Only pending leaves change.

Advances and payroll

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter the amount.	Type **Amount *** .
The installment must be between 0 and the amount.	Fix **Monthly** .
Please select the month.	Choose **Month** .
Payroll cannot be generated more than one month ahead.	Pick the right month.
Only Draft slips can be edited. Reopen it first.	Use **Reopen to Draft** .
Amounts cannot be negative.	Fix the amounts.
Select at least one slip.	Tick slips first.

SECTION 7

7 Quick checklist

Setup

- [ ] Departments, positions, holidays
- [ ] Salary accounts in chart

Employee

- [ ] Name, code, department, position
- [ ] Joining date and salary
- [ ] Accounts chosen
- [ ] Emergency contact

Every month

- [ ] Attendance saved daily
- [ ] Leaves approved or rejected
- [ ] Advances recorded

Payroll

- [ ] Drafts generated and checked
- [ ] Approved & posted
- [ ] Marked paid
- [ ] Slips printed

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 12 — Overseas Employment

Register job applicants, link them to employers and projects, track protector, visa and departure, and keep their sale, cost and payments.

TRAINING GUIDE · SIMPLE ENGLISH

SETUP | EMPLOYERS & PROJECTS | APPLICANT | CHILD RECORDS | FINANCE | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Overseas Employment** 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

Overseas Employment (OEP) is for recruitment for jobs abroad. You set up jobs, statuses and fees, add **Employers** and their **Projects** (demands), then register each **Applicant** with passport, protector, visa and departure details. Each applicant also has a sale, cost and payment record. This module is in the **Admin Backend**.

MENU PATH

Admin Backend left navigation → **Overseas** group → **Applicant List** item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Overseas	Applicant List · Projects
Overseas → Setup	Employer List · Job List · Job Status List · Academic Qualification List · Protector Status List · Passport Status List · Service Sale List · Service Cost List · Funds and Fee List

HOW THE WORK FLOWS

Setup Jobs, statuses, fees → **Employer & project** Demand for jobs → **Applicant** Profile, passport, protector, visa → **Finance** Sale, cost, payments

NOTE
Field names in the Admin Backend come from the system and may look like *Registration No*, *Date Of Birth* or *Is Active*.

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
Countries and passport statuses	Admin Backend setups	Nationality, country and passport status.
Agencies (service providers)	Admin Backend	Agency on projects and applicants.
Customers / agents	CRM → Customers	Customer and commission agent.
Banks	Admin Backend	Fee receipts.

SECTION 3

3 Step-by-step data entry

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

Part A — Setup lists

Open **Overseas → Setup**. Each list works the same: click **New**, fill, **Save**.

LIST	FIELDS
Job List	Title, Is Active
Job Status List	Status, Is Active
Academic Qualification List	Title, Is Active
Protector Status List	Status, Is Active
Service Sale List	Title, Default Amount, Is Active
Service Cost List	Title, Default Amount, Is Active
Funds and Fee List	Fee Receipt Title, Bank, Default Amount, Is Active

Part B — Employers and projects

Employer

1 New employer
Setup → Employer List → New. Type `Full Name`, `License No`, `Contact Person`, `Phone`, `Mobile`, `Email`, `Address`, `City`.

2 Required
`Full Name`, `Country` and `User Name` are **required** (employer portal login).

3 Save
Tick `Is Active` and **Save**.

Project

1 New project
Overseas → Projects → New. `Project No`, `Project Date`, `Title` (**required**), `Employer`, `Agency`, `Country`, `City`.

2 **Permission and visa**

Permission No, **Permission Date**, **Visa No**, **Start Date**, **End Date**, **Status**.

3 **Demand**

In the demand grid add each **Job** with **Man Power**, **Salary**, **Currency**, **Sale Amount**. Nominated, Recommended, Approved and Travelled show progress.

Part C — Register an applicant

Open **Overseas → Applicant List** and click **New**.

Applicant — registration

1 Registration
Registration No, Registration Date, Registration Type, Reference No, Customer.

2 Job
Agency, Project, Employer, Job, Job Status, Salary, Salary Currency, Contract Period.

Applicant — personal

1 Name
Full Name (required), Father Name, Gender, Date Of Birth, Place Of Birth, Marital Status, Religion, Nationality, CNIC, Height, Weight.

2 Contact
Mobile, Phone, Email, Address, City, Country.

3 Next of kin
Next Of Kin Name, Next Of Kin Relation, Next Of Kin CNIC, Next Of Kin Contact, Next Of Kin Address.

Applicant — passport, protector, visa

1 Passport
Passport No, Passport Issue Date, Passport Expiry Date, Passport Issue Place, Passport Status.

2 Protector
Protector Status, Protector No, Protector Date, Permission No.

3 Visa and travel
Visa No, Visa Date, Departure Date.

4 Login
User Name for the applicant portal. Use the **Reset Password** action to make a new password.

5 Save
Click **Save**.

Part D — Applicant records and finance

After the first save, the applicant has tabs (child grids). Click **New** in a tab to add a row.

TAB	FIELDS
Academic	Education, Institute, Board, Passing Year, Grade, Notes
Technical	Title, Institute, Duration, Passing Year, Notes
Experience	Employer Name, Job Title, Country, From Date, To Date, Notes
Language	Language, Speaking, Reading, Writing
Driving License	License Type, License No, Country, Issue Date, Expiry Date
Funds / Fee	Fee, Bank, Receipt No, Date, Amount, Notes
Document	Title, Document Type, File, Date, Notes
Sale	Service, Qty, Amount, Net Amount, Notes
Cost	Service, Service Provider, Qty, Amount, Net Amount, Notes
Payment	Voucher, Amount, Payment Date, Notes
Commission	Agent, Amount, Paid, Voucher, Notes

NOTE
Use the **Update Applicant Finance** action to refresh Total Sale, Discount, Net Sale, Total Payments, Balance, Total Cost, Net Cost and Profit Loss after adding sale, cost or payment rows.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Employer

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Full Name	Employer name.	Yes
Country	Country.	Yes
User Name	Portal login.	Yes
License No / Contact Person / Phone / Mobile / Email	Details.	No
Is Active	Active.	No

Project

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Title	Project title.	Yes
Project No / Project Date	Numbering.	No
Employer / Agency / Country / City	Who and where.	No
Permission No / Visa No / Start Date / End Date / Status	Permission.	No

Applicant

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Full Name	Applicant name.	Yes
Registration No / Date / Type	Registration.	No
Project / Employer / Job / Salary	Job.	No
Passport No / dates / Passport Status	Passport.	No
Protector Status / No / Date	Protector.	No
Visa No / Visa Date / Departure Date	Visa.	No
Total Sale / Net Sale / Balance / Profit Loss	Calculated.	Auto

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find applicants	**Applicant List**: use the search box and column filters.
Track a project	Open the project to see Nominated, Recommended, Approved and Travelled counts.
Reset a login	Select an applicant and use **Reset Password**.

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.

Validation

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
"Full Name" must not be empty.	Type the name (applicant or employer).
"Title" must not be empty.	Type the project title.
"Country" must not be empty.	Choose the employer country.
"User Name" must not be empty.	Type the employer user name.

SECTION 7

7 Quick checklist

Setup

- [ ] Jobs, statuses, fees
- [ ] Employer with login
- [ ] Project with demand

Applicant

- [ ] Full name and CNIC
- [ ] Project, employer, job
- [ ] Passport and protector
- [ ] Documents uploaded
- [ ] Sale, cost, payments
- [ ] Finance updated

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 13 — Customers & Contacts

Create customers (agents) with their login, credit rules and permissions, and keep IATA, visa companies, banks, airlines, transporters and service providers.

TRAINING GUIDE · SIMPLE ENGLISH

NEW CUSTOMER | CREDIT RULES | PERMISSIONS | CUSTOMER LIST | CONTACTS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Customers & Contacts** 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

A **customer** is the agent or company you sell to. Every booking, ticket and invoice needs one. The customer record also creates the customer's **portal login** and controls what the customer may do in the portal. Other contacts (IATA, visa companies, banks, airlines, transporters, service providers) are kept in the Admin Backend.

MENU PATH

Admin (top menu) → **CRM & Customers** (menu group) → **New Customer** (or Customer List)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → CRM & Customers	New Customer, Customer List
Admin Backend → Contacts	Customers, Banks, Visa Companies, IATA, Transporters, Service Providers, Airlines
Admin Backend → Contacts → Setup	Customer Types

HOW THE WORK FLOWS

Customer Types and Branch (Setup) → **New Customer** (Details and login) → **Update Customer Finance** (Receivable account) → **Permissions** (Portal rights) → **Use** (Bookings, invoices)

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
Customer Types	Admin Backend → Contacts → Setup → Customer Types	**Type *** is required on every customer.
Branches	Admin Backend → System → Branch	**Branch *** is required.
Service providers / SPO	Admin Backend → Contacts → Service Providers	Optional **SPO**, **Service Provider Link** and **Commission Service Provider**.
Chart of Accounts	Accounts → Chart of Accounts	The customer's **Receivable Account** is set with **Update Customer Finance**.

SECTION 3

3 Step-by-step data entry

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

Part A — Create a new customer

Open **Admin → CRM & Customers → New Customer**.

New Customer — details

1 Full Name
Type the customer or agency name in `Full Name *`. **Required.**

2 Type and Branch
Choose `Type` *and* `Branch`. Both **required**. `Category` (A, B, C, D) is optional.

3 Contact details
Fill `Contact Person`, `Passport No`, `Address`, `Address Line 2`, `City`, `Mobile`, `Email` and `Telephone`.

4 Country
Choose `Country *` (Pakistan, KSA or N/A). **Required.**

5 Links
Optional: `Service Provider Link`, `Commission Service Provider`, `SPO`, `VAT No` and `Portal Currency` (Pak Rupees or Saudi Riyal).

6 Credit rules
`Credit Limit` stops approvals above the limit. Tick `Advance Required For Voucher` if the customer must pay before a voucher is approved.

> ⓘ **NOTE**
> The `Receivable Account` box says *Set with Update Customer Finance*.

Part B — Login and portal permissions

New Customer — login and permissions

1 User Name
Type the portal `User Name *`. **Required** and must be unique.

2 **Status**

Tick **Is Active**. Tick **Blocked** only to stop all new work for this customer. Tick **Change Password On First Logon** for a new login.

3 **Voucher rights**

Tick **Allow Draft Voucher**, **Allow Final Voucher** and **Allow Star Voucher** as agreed.

4 **Portal options**

Tick only what the customer may do, for example **Allow Booking Edit**, **Allow IATA Change**, **Allow Visa Update**, **Allow Payment Upload**, **Allow Ticket Reservation**, **Allow Umrah Group Reservation**, **Allow Promotional Offers**.

5 **Restrictions**

Optional: **Voucher Hours Restriction**, blocked dates **Date From** / **Date To**, **Booking Start Date** / **Booking End Date**, **Readonly**, **Group Booking View Only**.

6 **Save**

Click **Save**, **Save and New** or **Save and Close**. The page shows **Customer saved**.

7 **Update Customer Finance**

After saving, click **Update Customer Finance** to create or link the receivable account.

> ⚠ **WARNING**
> *Save the customer before updating its finance.*

Part C — Other contacts (Admin Backend)

Open the Admin Backend, menu **Contacts**, choose the list and click **New**. Fill the fields, then **Save**.

Contacts

1. **IATA**
   Required: `Full Name`, `Visa Company`, `Country`, `User Name`. Optional accounts: Accounts Payable, Sale Account, Cost Account, `Transport Cost`, `Transport Payable`. Tick `Default for New Booking` for the main IATA.

2. **Visa Companies**
   Required: `Full Name`, `Country`, `User Name`. Optional: Zero Rate, Voucher Footer Text.

3. **Banks**
   Required: Bank Name/Account and `Country`. Link the bank's chart Account.

4. **Airlines**
   Required: `Code`, `Full Name`, `Country`, `User Name`. Optional: `ID` (IATA code), `BSP`, commission and WH percentages, accounts.

5. **Transporters and Service Providers**
   Fill Full Name, contact details and the Sale, Cost and Payable accounts. Tick Is Active.

6. **Customer Types**
   Type Name, Description, Is Default, Is Active.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

New Customer

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Full Name *	Customer / agency name.	Yes
Type *	Customer type.	Yes
Branch *	Branch.	Yes
Category	A, B, C or D.	No
Contact Person / Passport No / Address / Address Line 2 / City	Contact details.	No
Country *	Pakistan, KSA or N/A.	Yes
Mobile / Email / Telephone	Contact.	No
Receivable Account	Set with Update Customer Finance.	Auto
Service Provider Link / Commission Service Provider / SPO	Links.	No
VAT No	Tax number.	No
Credit Limit	Maximum balance.	No
Advance Required For Voucher	Payment before approval.	No
Portal Currency	Pak Rupees or Saudi Riyal.	No
User Name *	Unique portal login.	Yes
Is Active / Blocked / Change Password On First Logon	Status.	No
Allow ... boxes	Portal permissions.	No
Voucher Hours Restriction / Date From / Date To	Dates.	No
Booking Start Date / Booking End Date	Booking window.	No
Logo	Customer logo (if Allow Logo and Name).	No

IATA (Admin Backend)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Full Name	IATA name.	Yes
Visa Company	Linked visa company.	Yes
Country	Country.	Yes
User Name	Login name.	Yes
Default for New Booking	Main IATA.	No

Airlines (Admin Backend)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Code	Airline code.	Yes
Full Name	Airline name.	Yes
Country	Country.	Yes
User Name	Login name.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find a customer	**Admin → Customer List**. Search and click the customer to open it.
Edit	Open the customer, change fields, click **Save**.
History	**Audit History** on the customer list shows who changed what (When, User, Action, Field, Old, New).
Delete	Select the customer and click **Delete**. A customer with bookings cannot be deleted.

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.

Customer

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
This user name is already in use.	Choose another **User Name *** .
Save the customer before updating its finance.	Click **Save** first.
Type was not found.	Reload and choose **Type *** again.
Branch was not found.	Reload and choose **Branch *** again.
Customers can be changed by staff users only.	Sign in with a staff account.
Select a customer first.	Pick a row in the list.
This customer is used by other records and cannot be deleted.	Untick **Is Active** instead.
Nothing to save.	Change something, then save.

Contacts (Admin Backend)

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
"Full Name" must not be empty.	Fill Full Name.
"Country" must not be empty.	Choose Country.
"User Name" must not be empty.	Fill User Name.
"Visa Company" must not be empty.	IATA needs a visa company.
"Code" must not be empty.	Airline needs a code.
"Bank Name/Account" must not be empty.	Fill the bank name.

SECTION 7

7 Quick checklist

Before

- [ ] Customer type and branch exist
- [ ] Name and phone confirmed

Record

- [ ] Full Name, Type, Branch, Country
- [ ] Unique User Name
- [ ] Credit Limit and Advance rule agreed

After saving

- [ ] Update Customer Finance done
- [ ] Portal permissions ticked as agreed
- [ ] Login sent to customer securely

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 14 — Customer (Agent) Portal

What an agent or customer sees after sign-in: dashboard, bookings, vouchers, account statement, new booking and account security.

TRAINING GUIDE · SIMPLE ENGLISH

DASHBOARD | MY BOOKINGS | NEW BOOKING | MY LEDGER | PASSWORD & 2-STEP | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Customer (Agent) Portal** 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

The **Customer portal** is the CRM as seen by an agent (customer) login. A customer sees only their own data: **My dashboard**, **My bookings**, **My ledger** and **New booking**. All other CRM pages are blocked for them. Staff create the login on the customer record and use this guide to train their agents.

MENU PATH

Sign in
with the customer user name
→
My dashboard
home page

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Customer menu	Dashboard · My bookings · My ledger · New booking
User menu (top right)	Change Password · Two-step verification · Sign Out

HOW THE WORK FLOWS

Login made
Staff: customer record
→
Sign in
My dashboard
→
Work
Bookings, vouchers, ledger
→
Secure
Password, 2-step

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
Customer record with login	Admin → New Customer	**User Name**, *password and the* Allow ...* options decide what the agent can do.
Linked account	Customer record	If the login has no customer, the portal shows *Account not linked*.

SECTION 3

3 Step-by-step data entry

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

Part A — My dashboard

After sign-in the agent lands on **My dashboard** (*Welcome*).

My dashboard

1. **Cards**
   Total bookings (all your Umrah bookings), **Upcoming departures** (departing today or later), **Amount due** or **Advance / credit**, and **Current balance**.

2. **Recent bookings**
   The latest bookings with Departure. Click **Open** for one or **View all**.

3. **Quick links**
   Create booking, **Open your ledger**, **Change password**.

Part B — My bookings and vouchers

My bookings

1. **Filter**
   Type in **Search**, choose **Status** (All statuses) and **Travel** (Any date, Upcoming, Past, No date yet).

2. **Read a row**
   Each booking shows Departure, Return, Travellers, Voucher and Invoice.

3. **Open**
   Click **Open** to see the booking. Use the voucher link to print a voucher (All my vouchers).

4. **Help**
   WhatsApp us contacts the office.

Part C — New booking (accommodation voucher)

Click **New booking**. It opens the **Accommodation Voucher** form (see the *Umrah Vouchers & Accommodation* guide).

Accommodation Voucher (agent)

1 Guest
Fill `Passport No: *`, `Family Head:`, `Contact / Mobile:`, `Adults:`, `Childs:`, `Infants:`. The customer is your own account.

2 Hotels
Tick **Makkah** and/or **Madina**, choose the hotel, room type, dates, view and meal plan. The rate loads.

3 Save
Choose `Save Mode:` and click `Save`.

> **NOTE**
> Agent bookings may wait for staff approval. Staff see them under *Customer bookings waiting for approval* (Admin → Android App Control) and in the booking lists.

Part D — My ledger (account statement)

My account statement

1 Period
Choose **From** date (or This month / This financial year) and **Currency**. Click `Apply`; `Reset` clears.

2 Read
Opening balance, Date, Voucher / Ref, Description, Debit, Credit, Balance. Totals: Invoices & charges, Payments & credits, Closing balance.

3 Export
`Export CSV` or `Print / PDF`. `Back to my bookings`.

Part E — Change password and two-step verification

Change your password

1 Open

User menu → **Change Password**.

2 Fill

Type `Current password`, `New password` (at least 4 characters) and `Confirm new password`. Click `Change password`.

Two-step verification

1 Turn on

User menu → **Two-step verification**. Scan the QR code with an authenticator app (or use `Can't scan? Enter this key manually`). Type the `Code from the app` and click `Turn on`.

2 Recovery codes

Save your recovery codes: `Copy` or `Print`, then click **I saved them — continue**.

3 Change or turn off

Type `Enter a current code from your app to make changes`, then `New recovery codes`, `Generate a new key` or `Turn off`.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

My ledger filters

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
From	Start date.	No
Currency	Statement currency.	No

Change your password

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Current password	Now.	Yes
New password	At least 4 characters.	Yes
Confirm new password	Same again.	Yes

Two-step verification

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Code from the app	6-digit code.	Yes
Recovery code	Use if phone is lost.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Follow a booking	**My bookings → Open**: status, voucher, invoice.
Check balance	**My ledger**: amount due or advance.
Get help	**WhatsApp us** on My bookings.

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.

Portal

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Account not linked	Staff must link the login to a customer record.
No bookings yet	Nothing booked on this account.
No ledger yet	No transactions yet.

Password

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
The current password is not correct.	Type the right current password.
The new password must have at least 4 characters.	Use a longer password.
The new passwords do not match.	Type the same in both.
Your form expired. Please try again.	Reload the page.

Two-step

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
That code did not match. Make sure the time on your phone is set automatically and try the newest code.	Fix phone time; use the newest code.
Your administrator requires two-step verification.	Turn it on to continue.
Two-step verification is turned off by the administrator.	Not available now.

SECTION 7

7 Quick checklist

Staff before handing over

- [ ] Customer record with user name
- [ ] Allow options ticked
- [ ] Agent can sign in and see My dashboard

Agent

- [ ] Password changed
- [ ] Two-step on
- [ ] Recovery codes saved
- [ ] Knows My bookings and My ledger

Trainee name

Date

Trainer

DATA ENTRY TRAINING

Arch Travel CRM

Module 15 — Public Website & CMS

Run the public website from the CRM: settings, banners, pages and menus, announcements, listings, enquiries, online bookings and payments.

TRAINING GUIDE · SIMPLE ENGLISH

PORTAL SETTINGS | CONTENT | LISTINGS | ENQUIRIES | ONLINE BOOKINGS | PAYMENTS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Public Website & CMS** 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

The **public website** is managed from **Admin → Website & CMS**. You set the look and contact details in **Portal Settings**, add **Home Banners**, **Pages & Menus** and **Announcements**, choose what is shown in **Website Listings**, and then handle **Enquiries**, **Bookings** and **Payments** that guests send. These pages are for **administrators only**.

MENU PATH

Admin top menu → **Website & CMS** menu group → **Portal Settings** item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → Website & CMS	Portal Settings · File Manager · Announcements · Home Banners · Pages & Menus · Website Listings
Admin → Website Activity	Website Enquiries · Website Hotel Bookings · Website Bookings · Website Payments · Payment Accounts · View Website

HOW THE WORK FLOWS

Settings Title, logo, colours, contact → **Content** Banners, pages, news → **Listings** Packages, hotels, tickets → **Activity** Enquiries, bookings, payments

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	Roles & Permissions	Other users see *Administrators only*.
Packages, hotels, tickets, transport in the CRM	Their modules	Listings show CRM records.
Images	Admin → File Manager	Logo, banners, pictures.

SECTION 3

3 Step-by-step data entry

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

Part A — Portal Settings

Open **Admin → Portal Settings**. Use the tabs, then click **Save settings**.

General

1 Identity
Website title, **Website title (Arabic)**, **Tagline**, **Tagline (Arabic)**, **Logo**, **Site icon (favicon)**.

2 Colours
Main colour and **Accent colour** (#RRGGBB), or pick a theme: **Haram green**, **Madinah emerald**, **Kiswah black**, **Royal blue**, **Maroon**.

3 Google
Footer text, **Home page title for Google**, **Home page description for Google**.

Contact & social

1 Contact
Phone, **WhatsApp number**, **Email**, **Office address**, **Office address (Arabic)**, **Google Maps embed link**.

2 Social
Facebook, **Instagram**, **YouTube**, **X / Twitter**, **TikTok**.

Home page and booking

1 Hero
Hero title, **Hero text**, **Home Page Sections** (at least one), **Items per home section**.

2 Prices
Default currency, **Show prices on the website**, **Hotel prices on the website come from**.

3 **Online booking**
Tick **Guests can book hotels online**, **Guests can book transport online**, **Guests can book Umrah packages online**, **Guests can book group tickets online**. Set **Hours to pay a website booking**, **How to pay (when no payment account is set up)**, **Cancellation policy**.

Why choose us, Maintenance, Sample data

1 **Why choose us**
Add block: **Title**, **Order**, **Text**, **Icon** (Font Awesome name), **Show on the website**.

2 **Maintenance**
Tick **Maintenance mode** and type **Maintenance message**. Visitors see the message.

3 **Sample data**
Load sample data fills a demo website; **Remove sample data** clears it.

NOTE
The **Security** and **Backups** tabs (two-step verification for staff, Data Wipe users, **Back up now**) are covered in the *Administration & System Setup* guide.

Part B — Banners, pages, menus and announcements

Home Banners

1 Add banner
Click **Add banner**. **Title ***, **Order**, **Text**, **Background image**, **Background video (optional)**.

2 Button
Button text (e.g. View packages) and **Button link** (e.g. /umrah-packages).

3 Dates
Show from, **Show until**, **Active**. Click **Save banner**.

Pages & Menus

1 New page
New page: **Title**, ***Web address***, **Order**, **Short summary**, **Top image**, **Content**, Google title/description. Tick **Show contact details, enquiry form and map** and **Published (visible on the website)**. **Save page**.

2 New link
Menus → **New link**: **Menu** (Header or Footer), **Text**, ***Link***, **Order**, **Open in a new tab**, **Show**. **Save link**.

Announcements

1 New announcement
New announcement: **Title**, ***Web address***, **Summary**, **Image**, **Text** (and Arabic), **Publish date**, Google title/description.

2 Publish
Tick **Published** and optional **Featured (shown first)**. **Save announcement**.

File Manager

1 Upload
Upload files; **Copy link** to use a file in a page or banner.

Part C — Website Listings

Open **Website Listings**. Choose a tab: **Umrah packages**, **Hotels**, **Group tickets**, **Umrah group tickets**, **Transport & ziyarat**.

Website listing

1 Edit
Click **Edit** on a CRM record.

2 Text
Title on the website (and Arabic), **Web address ***, **Order**, **Short text**, **Description**, Google title/ description.

3 Price and pictures
Optional **"Price from" override**. **Main image** and gallery (**Add picture**, one picture per line).

4 Show
Tick **Show on the website** and **Featured (home page)**. **Save**. You see *Saved and shown on the website.*

Part D — Enquiries, bookings and payments

Website Enquiries

1. **Work an enquiry**
   Filter New / In progress / Closed. **Open** one, set **Status**, type **Staff notes** (e.g. Called back, sent quotation), **Save**.

Website Hotel Bookings / Website Bookings

1. **Open**
   Filter Reserved (to confirm), Confirmed, Payment overdue, Cancelled. **Open** a booking.

2. **Payment**
   Check **Payments sent by the guest**; type **Amount paid**, **Payment reference**.

3. **Link to CRM**
   Type the **CRM booking number** of the booking or voucher you made in the CRM. Add **Staff notes**.

4. **Confirm**
   Click **Confirm and email guest** (only reserved bookings). **Send email** sends again. **Cancel booking** needs a reason.

Website Payments

1. **Check**
   Filter To check / Verified / Rejected. Open the payment and view the **Receipt**.

2. **Verify**
   Type **Credit to the booking** and optional **Note**, click **Verify and add to booking**. Or **Reject** with the reason in **Note** (the guest sees it).

Payment Accounts

1. **Add account**
   Add account: **Method**, **Bank or wallet name**, **Account title**, **Account number / wallet mobile number**, **IBAN**, **Branch**, **Instructions for guests**, **Order**, **Active (shown to guests)**. **Save**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Portal Settings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Website title / Tagline / Logo	Identity.	No
Main colour / Accent colour	#RRGGBB.	No
Email	Valid email.	No
Google Maps embed link	Embed address only.	No
Home Page Sections	At least one on.	Yes
Guests can book ...	Online booking switches.	No
Hours to pay a website booking	Payment time.	No
Maintenance mode / message	Closes the site.	No

Banners / Pages / Announcements

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Title *	Title.	Yes
Web address *	Page address (pages, news).	Yes
Button link	Needed with button text.	No
Show from / Show until	Until not before from.	No
Menu / Text * / Link *	Menu link.	Yes

Listings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Web address *	Address.	Yes
Title on the website	Title.	No
Show on the website / Featured	Visibility.	No

Bookings & payments

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Amount paid	Not negative.	No
Guest email	Valid email.	No
CRM booking number	Link to CRM.	No
Credit to the booking	Amount to credit.	Yes
Method / Bank or wallet name / Account number	Payment account.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Check the site	Click **View website** on any page.
Guest self-service	Guests use *booking number + PIN* to see, pay or cancel, and *booking number + passport number* for booking status.

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.

Settings

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Colours must be in the form #RRGGBB.	Fix the colour code.
Map link must be a Google Maps embed address (https://www.google.com/maps/embed?...).	Use the embed link.
Enter a valid email address.	Fix email.
Turn on at least one home page section.	Tick a section.
Icon must be a Font Awesome name such as ...	Use a valid icon name.

Content

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter a title.	Type **Title *** .
Enter a page title.	Type it.
Write the announcement text.	Fill **Text** .
Enter the page the button opens, e.g. /umrah-packages.	Fill **Button link** .
The end date is before the start date.	Fix dates.
Enter the menu text.	Fill **Text *** .
Choose Header or Footer.	Choose **Menu** .

Activity

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Choose a status.	Choose **Status** .
Only reserved bookings can be confirmed.	Booking already changed.
Enter the reason for cancelling.	Type a reason.
The amount paid cannot be negative.	Fix amount.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter the amount to credit to the booking.	Type amount.
Choose the payment method.	Choose **Method**.
The IBAN does not look right (e.g. PK36SCBL0000001123456702).	Check IBAN.

SECTION 7

7 Quick checklist

Setup

- [ ] Title, logo, colours
- [ ] Contact and social
- [ ] Home sections and banners
- [ ] Payment accounts

Daily

- [ ] New enquiries answered
- [ ] Reserved bookings confirmed
- [ ] Payments verified
- [ ] CRM booking number linked

Content

- [ ] Pages published, menus linked
- [ ] Listings shown with pictures

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 16 — Android App Control

Connect Firebase, set what the Android app shows, publish updates, manage phones and permissions, and send inbox messages and phone alerts.

TRAINING GUIDE · SIMPLE ENGLISH

FIREBASE | APP SETTINGS | PEOPLE & DEVICES | APP INBOX | PHONE ALERTS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **Android App Control** 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

Android app control is one page for everything about the mobile apps (the customer app and the CRM staff app). First connect **Firebase** so phones can receive alerts. Then set the app content, modules and APK updates and **publish** them. You can also see registered phones, approve customer booking requests, set staff permissions, and send messages. Only an **administrator** can use this page.

MENU PATH

Admin
top menu
→
Android App Control
Website & CMS group

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin	**Android App Control** (old links App Management, App Notifications, App Workspace and Firebase open this page)

HOW THE WORK FLOWS

Connect Firebase
google-services.json + server credential
→
App settings
Content, modules, APK
→
Publish
Draft → app
→
Communicate
Inbox and alerts

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	Roles & Permissions	*Only an administrator can configure Firebase.*
Firebase project files	Firebase console (Google)	CRM and Flutter **google-services.json** and the **service-account JSON**.
APK download link	Your web host	**HTTPS APK download link** for updates.

SECTION 3

3 Step-by-step data entry

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

Part A — Connect Firebase

Open the **Connect Firebase** section.

Connect Firebase

1. **Import app files**
   Use **Import CRM google-services.json** and **Import Flutter google-services.json** (under 128 KB). The IDs fill in.

2. **Check IDs**
   Project ID (not the display name), **Sender ID / project number** (numbers), **CRM Android app ID**, **CRM Android API key**, **Flutter Android app ID**, **Flutter Android API key**.

3. **Server credential**
   Use **Upload service-account JSON** (under 32 KB) from the same Firebase project.

4. **Save and test**
   Click **Save configuration**. Then **Check Google authentication**. You see *Google authentication verified.* **Reload saved settings** reloads.

NOTE
The check does not send a notification. After saving, open the app and enable notifications from Profile.

Part B — Android app settings and publishing

App content

1. **Text**
   Welcome text, Announcement, Banner title, Banner opens (No action, Hotel Kruki, Tickets, Umrah groups, Voucher preview), Banner description.

2. **Modules and Home page**
   Turn modules on or off and choose the home page blocks.

APK updates

1. **Version**
   Latest version code, Minimum supported code (older apps must update), Display version.

2. **Download**
   HTTPS APK download link and Release notes.

Maintenance

1. **Pause**
   Tick Pause app booking changes and type Message shown in the app.

Publish

1. **Save draft**
   Click Save draft, then Preview saved draft to see **App preview**.

2. **Publish**
   Click Publish to app. It appears in **Published versions** and **Change history**.

Part C — People, devices and requests

User permissions

1. **Rule**
   Type the Exact CRM username, set what the user may do in the app, click Save permissions. With no rule, staff keep default CRM access.

Registered devices

1. **Find**
   Use **Find user or device**. Remove a phone that should not get alerts.

Booking requests

1. **Review**
   Filter **Status** (Pending, In review, Completed, Declined, All). Open a customer booking waiting for approval and process it.

Support contacts

1. **Contacts**
   Support email, **Support phone**, **Working hours**. Click **Save support contacts**.

Part D — App inbox and phone alerts

App inbox

1. **Write**
   Title and Message. Choose Audience: All eligible users or Selected users (Find a user).

2. **Publish**
   Click Preview message, check **Review before publishing**, then Publish to app inbox.

Phone alerts

1. **Recipients**
   Choose All eligible phones or Selected users.

2. **Send**
   Type the message, click Review recipients, then Send this notification. See **Send history**.

3. **Pending**
   If some phones are pending use Continue pending phones or Stop pending phones.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Connect Firebase

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
CRM / Flutter google-services.json	Under 128 KB.	Yes
Project ID	Firebase project ID.	Yes
Sender ID / project number	Numbers only.	Yes
Android app ID / API key	From the json file.	Yes
Service-account JSON	Under 32 KB, same project.	Yes

App settings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Welcome text / Announcement / Banner	App home.	No
Latest version code / Minimum supported code / Display version	Updates.	No
HTTPS APK download link	Must be https.	No
Pause app booking changes / Message	Maintenance.	No

Inbox / alerts

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Title / Message	Content.	Yes
Audience / Recipients	Who gets it.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Check alerts	**Booking alerts** and **Phones registered for alerts** show which phones get alerts.
Staff phones	**Staff phones signed in to CRM** lists staff devices.
History	**Change history**, **Access change history**, **Send history**.

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.

Firebase

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Choose a google-services.json file smaller than 128 KB.	Pick the right file.
The selected file is not valid JSON.	Download it again.
This is a server credential. Use the Server credential upload below.	Upload it in Server credential.
Enter the Firebase project ID, not its display name.	Use the ID.
Enter the numeric Firebase sender / project number.	Numbers only.
The service account must belong to the Firebase project being saved.	Use the same project.
Google authentication failed. Check the service account, key status, server time and internet connection.	Check the key and server time.
Only an administrator can configure Firebase.	Use an admin login.

Devices and page

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Choose a registered phone.	Pick a phone first.
That phone is no longer registered.	Refresh the list.
Administrator access required.	Use an admin login.
The control page could not reach CRM.	Reload the page.

SECTION 7

7 Quick checklist

Setup

- [ ] Both google-services.json imported
- [ ] Service account uploaded
- [ ] Google authentication verified

Every release

- [ ] Version codes and APK link
- [ ] Draft previewed
- [ ] Published

Daily

- [ ] Booking requests reviewed
- [ ] Messages sent to the right audience

Trainee name _____ Date _____ Trainer _____

DATA ENTRY TRAINING

Arch Travel CRM

Module 17 — WhatsApp

Link the office WhatsApp number to the CRM, send messages, read recent chats and sync Umrah groups.

TRAINING GUIDE · SIMPLE ENGLISH

START SERVICE | LINK A DEVICE | SEND A MESSAGE | CHATS & GROUPS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **WhatsApp** 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

The **WhatsApp** page connects one office WhatsApp phone to the CRM through a small service on the server. Once linked, staff can send a message to any number, read recent chats and see the Umrah WhatsApp groups.

MENU PATH

Admin top menu → **WhatsApp** menu item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → WhatsApp	WhatsApp

HOW THE WORK FLOWS

Install Service packages → **Start** Service running → **Link** Scan QR with phone → **Use** Send, chats, groups

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
Node.js on the server	Server (IT)	*Install did not finish. Node.js must be installed on this server.*
WhatsApp service settings	Web.config (IT)	Without them: *WhatsApp service settings are missing from Web.config.*
Office phone with WhatsApp	Your office	To scan the QR code.
Access	Roles & Permissions	Else *Access denied.*

SECTION 3

3 Step-by-step data entry

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

Part A — Install and start the service

Open **Admin → WhatsApp**. The top shows the status (*Not connected*, *The service is stopped.* etc.).

Service

1. **Install (first time)**
   Click **Install**. Wait for *WhatsApp packages are installed.*

2. **Start**
   Click **Control** to start or stop the service. You see *WhatsApp service is starting. The QR code appears in a few seconds.*

3. **Restart**
   If it hangs, click **Restart Service**.

Part B — Link a device

Link a device

1. **Scan**
   On the office phone open WhatsApp → **Linked devices** → **Link a device** and scan the **WhatsApp QR code**.

2. **New code**
   If the code expired click **New QR code**.

3. **Disconnect**
   Disconnect unlinks the phone. Stopping the service keeps the phone linked.

Part C — Send a message, chats and groups

Send a message

1. **Number**

Type **Phone number with country code** with no + or spaces, e.g. 923001234567.

2 **Message**
Type the **Message** and click **Send**. You see *Message sent.*

Recent chats and Umrah groups

1 **Chats**
Click a chat in **Recent chats** to read **Messages**.

2 **Groups**
Click **Sync Groups** to load WhatsApp groups. Search **Umrah groups**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Send a message

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Phone number with country code	e.g. 923001234567.	Yes
Message	Text.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Check status	The status line shows connected / not connected.
Keep running	Start the service after a server restart.

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.

Service

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Install the WhatsApp packages first.	Click **Install**.
Install did not finish. Node.js must be installed on this server.	IT installs Node.js.
The WhatsApp service could not start.	Try **Restart Service**; tell IT.
The WhatsApp service is not running. In the whatsapp-service folder, run start-whatsapp.cmd.	Start it (IT) or click **Control**.
WhatsApp service settings are missing from Web.config.	IT adds settings.
The WhatsApp service folder was not found.	IT checks install.

Sending

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Message was not sent.	Check number and connection.
Not connected.	Link the phone again.
WhatsApp could not be reached.	Check service and internet.
Access denied.	Ask for permission.

SECTION 7

7 Quick checklist

Setup

- [ ] Packages installed
- [ ] Service running
- [ ] Phone linked

Every message

- [ ] Number with country code
- [ ] *Message sent.* shown

Trainee name

Date

Trainer

DATA ENTRY TRAINING

Arch Travel CRM

Module 18 — KPI & Task Tracking

Measure the business with KPI definitions and scorecards, and track staff tasks from New to Completed with a history.

TRAINING GUIDE · SIMPLE ENGLISH

TASK TYPES | TASKS | SET STATUS | KPI DEFINITIONS | SCORECARDS | ERRORS | CHECKLIST

For trained staff and customers

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START HERE

How to use this guide

This guide teaches you to enter data in the **KPI & Task Tracking** 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

Both tools are in the **Admin Backend**. **Task Tracking** gives each job (call a customer, get a confirmation, deliver passports) a number, an owner, a priority and a status. Every status change is saved in the task **History**. **KPI** (Key Performance Indicators) counts or sums records over a period, for example bookings this month, and shows them in **Scorecards**.

MENU PATH

Admin Backend (left navigation) → **Task Tracking** (group) → **All Task List** (item)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Task Tracking	All Task List, Task Types
KPI	Definition, Scorecard

HOW THE WORK FLOWS

Task types (Type and default owner) → **Task** (Subject, owner, priority) → **Status** (New → In Progress → Completed) → **KPI** (Definitions → scorecard)

NOTE
KPI screens are standard Admin Backend screens. Field names on your screen may differ slightly from this guide.

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
Employees	HR / Admin Backend → HR Management → Employee	**Assigned To** and **Default Owner**.
Customers and bookings	CRM	Optional links on a task.

SECTION 3

3 Step-by-step data entry

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

Part A — Task types

Task Types

1 New type
Open **Task Tracking → Task Types** and click **New**.

2 Fill
`Type` (**required**), `Default Owner` (employee who gets these tasks), tick `Active`. **Save**.

Part B — Create and work a task

Task

1 New task
Open **Task Tracking → All Task List** and click **New**. `Number` is the task number.

2 What
`Subject` (**required**) and `Type`.

3 Who
`Assigned To` (employee) and `Priority`: Low, Normal, High or Urgent.

4 Links
Optional `Customer`, `Booking`, `Confirmation No`. Tick `Receive SMS` if needed.

5 Notes and save
Type `Notes` and **Save**. The history shows *Task created*.

Set Status

1 Change status
Select the task and use the **Set Status** action (*Change task status and log it to History*).

2 **Statuses**
New, In Progress, Waiting, Completed, Cancelled.

3 **History**
Each change adds a line *Status changed from …* with who and when.

Part C — KPI definitions and scorecards

KPI Definition

1. **New KPI**
   Open **KPI → Definition** and click **New**. Give it a name.

2. **What to measure**
   Choose the record type (e.g. bookings), the filter (criteria) and the expression (e.g. count or sum).

3. **Period**
   Choose the range (e.g. this month) and the range to compare (e.g. last month).

4. **Zones**
   Set the green and red zones so good and bad results show in colour. Tick active and **Save**.

KPI Scorecard

1. **New scorecard**
   Open **KPI → Scorecard**, click **New**, name it and add the KPI definitions to show. **Save**.

2. **Read**
   Open the scorecard to see the current value, the previous value and the trend.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Task Types

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Type	Type name.	Yes
Default Owner	Employee.	No
Active	Use this type.	No

Task

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Number	Task number.	No
Subject	What to do.	Yes
Status	New / In Progress / Waiting / Completed / Cancelled.	No
Assigned To	Employee.	No
Type	Task type.	No
Priority	Low / Normal / High / Urgent.	No
Customer / Booking / Confirmation No	Links.	No
Receive SMS	SMS updates.	No
Notes	Details.	No

KPI Definition (standard)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Name	KPI name.	Yes
Record type / criteria / expression	What to measure.	Yes
Range / compare range	Periods.	No
Green / red zone	Colours.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
My tasks	**All Task List**: filter by Assigned To, Status, Priority.
Follow up	Open a task and read **History**.
Scorecards	Open the KPI scorecard at the start of each week or month.

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.

Validation

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
"Subject" must not be empty.	Type a subject.
"Type" must not be empty.	Type the task type name.

SECTION 7

7 Quick checklist

Tasks

- [ ] Types with default owner
- [ ] Every task has subject, owner, priority
- [ ] Status kept up to date
- [ ] Completed or cancelled when done

KPI

- [ ] Definitions with right filter and period
- [ ] Zones set
- [ ] Scorecard reviewed

Trainee name _____ Date _____ Trainer _____

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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START HERE

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 _____