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

Contents

How to use this guide 3
1 Module introduction and menu path 4
2 Prerequisites: set up these first 5
3 Step-by-step data entry 6
Part A My dashboard 6
Part B My bookings and vouchers 6
Part C New booking (accommodation voucher) 7
Part D My ledger (account statement) 7
Part E Change password and two-step verification 8
4 Field tables for every screen 9
5 After you save: find, edit, print 10
6 Common errors and how to fix them 11
7 Quick checklist 12

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