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 _____