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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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 _____