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 _____