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 _____