DATA ENTRY TRAINING

Arch Travel CRM

Module 15 — Public Website & CMS

Run the public website from the CRM: settings, banners, pages and menus, announcements, listings, enquiries, online bookings and payments.

TRAINING GUIDE · SIMPLE ENGLISH

PORTAL SETTINGS | CONTENT | LISTINGS | ENQUIRIES | ONLINE BOOKINGS | PAYMENTS | 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 Portal Settings 6
Part B Banners, pages, menus and announcements 8
Part C Website Listings 9
Part D Enquiries, bookings and payments 10
4 Field tables for every screen 11
5 After you save: find, edit, print 13
6 Common errors and how to fix them 14
7 Quick checklist 16

START HERE

How to use this guide

This guide teaches you to enter data in the **Public Website & CMS** 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 **public website** is managed from **Admin → Website & CMS**. You set the look and contact details in **Portal Settings**, add **Home Banners**, **Pages & Menus** and **Announcements**, choose what is shown in **Website Listings**, and then handle **Enquiries**, **Bookings** and **Payments** that guests send. These pages are for **administrators only**.

MENU PATH

Admin top menu → **Website & CMS** menu group → **Portal Settings** item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → Website & CMS	Portal Settings · File Manager · Announcements · Home Banners · Pages & Menus · Website Listings
Admin → Website Activity	Website Enquiries · Website Hotel Bookings · Website Bookings · Website Payments · Payment Accounts · View Website

HOW THE WORK FLOWS

Settings Title, logo, colours, contact → **Content** Banners, pages, news → **Listings** Packages, hotels, tickets → **Activity** Enquiries, bookings, payments

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
Administrator login	Roles & Permissions	Other users see *Administrators only*.
Packages, hotels, tickets, transport in the CRM	Their modules	Listings show CRM records.
Images	Admin → File Manager	Logo, banners, pictures.

SECTION 3

3 Step-by-step data entry

Follow the parts in order. Each part matches one screen or task.

Part A — Portal Settings

Open **Admin → Portal Settings**. Use the tabs, then click **Save settings**.

General

1 Identity
Website title, **Website title (Arabic)**, **Tagline**, **Tagline (Arabic)**, **Logo**, **Site icon (favicon)**.

2 Colours
Main colour and **Accent colour** (#RRGGBB), or pick a theme: **Haram green**, **Madinah emerald**, **Kiswah black**, **Royal blue**, **Maroon**.

3 Google
Footer text, **Home page title for Google**, **Home page description for Google**.

Contact & social

1 Contact
Phone, **WhatsApp number**, **Email**, **Office address**, **Office address (Arabic)**, **Google Maps embed link**.

2 Social
Facebook, **Instagram**, **YouTube**, **X / Twitter**, **TikTok**.

Home page and booking

1 Hero
Hero title, **Hero text**, **Home Page Sections** (at least one), **Items per home section**.

2 Prices
Default currency, **Show prices on the website**, **Hotel prices on the website come from**.

3 **Online booking**
Tick **Guests can book hotels online**, **Guests can book transport online**, **Guests can book Umrah packages online**, **Guests can book group tickets online**. Set **Hours to pay a website booking**, **How to pay (when no payment account is set up)**, **Cancellation policy**.

Why choose us, Maintenance, Sample data

1 **Why choose us**
Add block: **Title**, **Order**, **Text**, **Icon** (Font Awesome name), **Show on the website**.

2 **Maintenance**
Tick **Maintenance mode** and type **Maintenance message**. Visitors see the message.

3 **Sample data**
Load sample data fills a demo website; **Remove sample data** clears it.

NOTE
The **Security** and **Backups** tabs (two-step verification for staff, Data Wipe users, **Back up now**) are covered in the *Administration & System Setup* guide.

Part B — Banners, pages, menus and announcements

Home Banners

1 Add banner
Click **Add banner**. **Title ***, **Order**, **Text**, **Background image**, **Background video (optional)**.

2 Button
Button text (e.g. View packages) and **Button link** (e.g. /umrah-packages).

3 Dates
Show from, **Show until**, **Active**. Click **Save banner**.

Pages & Menus

1 New page
New page: **Title**, ***Web address***, **Order**, **Short summary**, **Top image**, **Content**, Google title/description. Tick **Show contact details, enquiry form and map** and **Published (visible on the website)**. **Save page**.

2 New link
Menus → **New link**: **Menu** (Header or Footer), **Text**, ***Link***, **Order**, **Open in a new tab**, **Show**. **Save link**.

Announcements

1 New announcement
New announcement: **Title**, ***Web address***, **Summary**, **Image**, **Text** (and Arabic), **Publish date**, Google title/description.

2 Publish
Tick **Published** and optional **Featured (shown first)**. **Save announcement**.

File Manager

1 Upload
Upload files; **Copy link** to use a file in a page or banner.

Part C — Website Listings

Open **Website Listings**. Choose a tab: **Umrah packages**, **Hotels**, **Group tickets**, **Umrah group tickets**, **Transport & ziyarat**.

Website listing

1 Edit
Click **Edit** on a CRM record.

2 Text
Title on the website (and Arabic), **Web address ***, **Order**, **Short text**, **Description**, Google title/ description.

3 Price and pictures
Optional **"Price from" override**. **Main image** and gallery (**Add picture**, one picture per line).

4 Show
Tick **Show on the website** and **Featured (home page)**. **Save**. You see *Saved and shown on the website.*

Part D — Enquiries, bookings and payments

Website Enquiries

1. **Work an enquiry**
   Filter New / In progress / Closed. **Open** one, set **Status**, type **Staff notes** (e.g. Called back, sent quotation), **Save**.

Website Hotel Bookings / Website Bookings

1. **Open**
   Filter Reserved (to confirm), Confirmed, Payment overdue, Cancelled. **Open** a booking.

2. **Payment**
   Check **Payments sent by the guest**; type **Amount paid**, **Payment reference**.

3. **Link to CRM**
   Type the **CRM booking number** of the booking or voucher you made in the CRM. Add **Staff notes**.

4. **Confirm**
   Click **Confirm and email guest** (only reserved bookings). **Send email** sends again. **Cancel booking** needs a reason.

Website Payments

1. **Check**
   Filter To check / Verified / Rejected. Open the payment and view the **Receipt**.

2. **Verify**
   Type **Credit to the booking** and optional **Note**, click **Verify and add to booking**. Or **Reject** with the reason in **Note** (the guest sees it).

Payment Accounts

1. **Add account**
   Add account: **Method**, **Bank or wallet name**, **Account title**, **Account number / wallet mobile number**, **IBAN**, **Branch**, **Instructions for guests**, **Order**, **Active (shown to guests)**. **Save**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Portal Settings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Website title / Tagline / Logo	Identity.	No
Main colour / Accent colour	#RRGGBB.	No
Email	Valid email.	No
Google Maps embed link	Embed address only.	No
Home Page Sections	At least one on.	Yes
Guests can book ...	Online booking switches.	No
Hours to pay a website booking	Payment time.	No
Maintenance mode / message	Closes the site.	No

Banners / Pages / Announcements

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Title *	Title.	Yes
Web address *	Page address (pages, news).	Yes
Button link	Needed with button text.	No
Show from / Show until	Until not before from.	No
Menu / Text * / Link *	Menu link.	Yes

Listings

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Web address *	Address.	Yes
Title on the website	Title.	No
Show on the website / Featured	Visibility.	No

Bookings & payments

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Amount paid	Not negative.	No
Guest email	Valid email.	No
CRM booking number	Link to CRM.	No
Credit to the booking	Amount to credit.	Yes
Method / Bank or wallet name / Account number	Payment account.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Check the site	Click **View website** on any page.
Guest self-service	Guests use *booking number + PIN* to see, pay or cancel, and *booking number + passport number* for booking status.

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.

Settings

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Colours must be in the form #RRGGBB.	Fix the colour code.
Map link must be a Google Maps embed address (https://www.google.com/maps/embed?...).	Use the embed link.
Enter a valid email address.	Fix email.
Turn on at least one home page section.	Tick a section.
Icon must be a Font Awesome name such as ...	Use a valid icon name.

Content

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter a title.	Type **Title *** .
Enter a page title.	Type it.
Write the announcement text.	Fill **Text** .
Enter the page the button opens, e.g. /umrah-packages.	Fill **Button link** .
The end date is before the start date.	Fix dates.
Enter the menu text.	Fill **Text *** .
Choose Header or Footer.	Choose **Menu** .

Activity

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Choose a status.	Choose **Status** .
Only reserved bookings can be confirmed.	Booking already changed.
Enter the reason for cancelling.	Type a reason.
The amount paid cannot be negative.	Fix amount.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter the amount to credit to the booking.	Type amount.
Choose the payment method.	Choose **Method**.
The IBAN does not look right (e.g. PK36SCBL0000001123456702).	Check IBAN.

SECTION 7

7 Quick checklist

Setup

- [ ] Title, logo, colours
- [ ] Contact and social
- [ ] Home sections and banners
- [ ] Payment accounts

Daily

- [ ] New enquiries answered
- [ ] Reserved bookings confirmed
- [ ] Payments verified
- [ ] CRM booking number linked

Content

- [ ] Pages published, menus linked
- [ ] Listings shown with pictures

Trainee name _____ Date _____ Trainer _____