DATA ENTRY TRAINING

Arch Travel CRM

Module 7 — Transport

Set up routes, vehicles and rates, make transport vouchers, run outsource trips and dispatch from the board.

TRAINING GUIDE · SIMPLE ENGLISH

SETUP | TRANSPORT VOUCHER | REQUESTS | OUTSOURCE TRIPS | DISPATCH | 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 **Transport** 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

Transport moves guests between airports, hotels and cities. First set up **Routes**, **Vehicles & Types** and **Transport Rates**. Then make a **Transport Voucher** for a customer, attach trips to an **Outsource Trip** if a transporter does the job, and follow the day on the **Dispatch Board**.

MENU PATH

Transports (top menu) → **New Transport Voucher** (menu item)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Transports → Setup	Routes · Vehicles & Types · Transport Rates
Transports → Work	Dashboard · Dispatch Board · Transport Requests · New Transport Voucher · Transport Voucher List
Transports → Outsource	Outsource Trips · New Outsource Trip · Transport Intimation Report
Umrah → Self Hotel Transport	New Transport Request · Request List

HOW THE WORK FLOWS

Setup (Routes, vehicles, rates) → **Voucher** (Customer trips) → **Assign** (Vehicle or outsource trip) → **Dispatch** (Board on the day)

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
Transporters	Service provider accounts	**Transporter:** on vouchers and trips.
Customers	Admin → New Customer	**Customer:** on the voucher.
Exchange rate	SAR rates	**Exchange Rate (PKR per SAR) :**.
Confirm right	Roles & Permissions	To confirm transport vouchers.

SECTION 3

3 Step-by-step data entry

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

Part A — Setup: routes, vehicles, rates

Transport Routes

1 Add Route

Open **Transports → Routes**, click **New**. Type **Route Name *** (**required**), **Full Title** (defaults to the route name), **From City / Sector**, **To City / Sector**, **Default Rate (SAR)**.

2 Kind

Tick **Arrival**, **Departure**, **Inter City** or **Ziyarat**. Add **Arrival Description** / **Departure Description**. Tick **Show on Voucher** and **Active**. Click **Save**.

Vehicles & Transport Types

1 Add Transport Type

Type **Type Name ***, **Short Name**, **Capacity**, **Description**. Tick **Default**, **Private**, **Sharing**, **Show on Voucher**, **Show on Web**, **Active**. **Save**.

2 Add Vehicle

Type **Vehicle Name** or **Plate / Number** (one is needed), **Vehicle Type**, **Model**, **Seats**, **Driver**, **Driver Mobile**, **Notes**. **Save**.

Transport Rates

1 Add Rate

Choose **Route** *and* ***Vehicle Type*** (**required**), optional **Transporter** and **Customer Type**.

2 Prices

Type **Sale (SAR)** and/or **Cost (SAR)**; **Profit** shows. Set **Valid From** / **Valid To**, **Notes**, **Active**. **Save**.

Part B — New Transport Voucher

Open **Transports → New Transport Voucher**.

Transport Voucher — header

1. **Voucher**
   `Voucher No:` is *Created on save*. Set `Voucher Date:`.
2. **Parties**
   Choose `Transporter:` and `Customer:`. Choose `Voucher Status:`.
3. **Guest**
   Type `Guest Name:`, `PAX:`, `Contact #:`, `Notes:` and `Exchange Rate (PKR per SAR) :`.

Transport Voucher — trips

1. **Trip**
   Set `Travel Date`, `Travel Time`, `Transport Type` and `Transport Route`. The saved rate fills `Unit Price` and `Unit Cost`.
2. **Custom price**
   If no rate is saved you see *No saved rate for this type and route; enter the price.* Tick `Custom` and type the price.
3. **Quantity and supplier**
   `Qty`, `Service Provider`, `Commission`.
4. **Vehicle**
   `Vehicle`, `Driver`, `Driver phone`, `Plate` if known.
5. **Add and save**
   Click `Add` for each trip. Check `Total Cost`, `Total Price`, `Total Commission`, `Profit`. Click `Save`.

Part C — Transport requests (self hotel)

When a guest books their own hotel, staff log the pick-up at **Umrah → New Transport Request**.

New Transport Request

1. **Booking**

Choose **Booking:**. **Customer:** fills.

2 **Pick-up**

Checkout: date, **Hotel:**, **Room No:**, **Contact Person:**, **Contact No:**.

3 **Trip**

Sector:, **PAX:**, **Next Hotel:**, **Status:**.

4 **Notes**

Customer Notes:, **KSA Notes:**. Click **Save** or **Save & New**.

Part D — Outsource trips and dispatch

Outsource Trip

1 Trip

Open **Transports → New Outsource Trip**. Set `Trip Date / Time:`, `Route:`, `Vehicle Type:`, `Status:`, `Notes:`.

2 Who drives

`Transporter:` or `Service Provider:`, `Vehicle:`, `Driver / Phone:`, `Vehicle plate:`, `Seats:`.

3 Cost

`Currency:` (SAR/PKR), `Cost SAR :`, `Commission:`, `Exchange Rate (PKR per SAR) :`.

4 Attach vouchers

Tick `Same route` / `Same vehicle type`, click `Find`, tick vouchers and `Attach selected`. `Detach` removes one. Click `Save`.

Dispatch Board

1 Day view

Open **Transports → Dispatch Board**. Click `Today`; filter `City`, `Transporter`, `Vehicle type`, `Status` (Unassigned, Assigned, Completed, Cancelled).

2 Views

Switch `Board` / `Table`; `Excel`, `Print`, `Refresh`. Tick `Auto-refresh 60s`.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Routes

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Route Name *	Unique name.	Yes
Full Title	Defaults to name.	No
From / To City / Sector	Ends.	No
Default Rate (SAR)	Not negative.	No
Arrival / Departure / Inter City / Ziyarat	Kind.	No

Vehicles & Types

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Type Name *	Transport type.	Yes
Capacity	Not negative.	No
Vehicle Name / Plate / Number	One is needed.	Yes
Seats	Not negative.	No
Driver / Driver Mobile	Driver.	No

Transport Rates

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Route *	Route.	Yes
Vehicle Type *	Type.	Yes
Transporter / Customer Type	Optional filters.	No
Sale (SAR) / Cost (SAR)	At least one.	Yes
Valid From / Valid To	From not after To.	No

Transport Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Voucher Date:	Date.	Yes
Transporter:	Transporter.	Yes
Customer:	Customer.	Yes
Voucher Status:	Status.	Yes
Guest Name:	Guest.	Yes
PAX:	Passengers.	Yes
Exchange Rate (PKR per SAR) :	Rate.	Yes
Trip: Travel Date / Time / Transport Type / Route	Each trip.	Yes
Unit Price / Qty / Unit Cost	Prices.	No

Outsource Trip

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Trip Date / Time:	When.	Yes
Route:	Route.	Yes
Transporter: / Service Provider:	Who.	Yes
Status:	Draft, Confirmed, Completed, Cancelled.	Yes
Exchange Rate	Rate.	Yes
Seats / Cost / Commission	Not negative.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find vouchers	**Transport Voucher List**: number or guest, customer, dates, status, transporter, type, route; tick Needs vehicle.
Find trips	**Outsource Trips** by date, transporter, status.
Intimation	**Transport Intimation Report**: Yesterday / Today / Custom, Show Summary, Print, CSV.
Requests	**Transport Requests** (Umrah → Request List).

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.

Setup

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please enter the route name.	Type **Route Name *** .
Another route is already named ...	Use another name.
Please enter the vehicle name or plate number.	Type one.
Another vehicle already has plate / number ...	Check the plate.
Please enter the type name.	Type **Type Name *** .
Please select the route.	Choose **Route *** .
Please select the vehicle type.	Choose **Vehicle Type *** .
Please enter the sale or cost price.	Type a price.
Valid From cannot be after Valid To.	Fix dates.

Transport voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please set voucher date.	Set **Voucher Date:** .
Please select transporter.	Choose it.
Please select customer.	Choose it.
Please enter guest name.	Type it.
Please enter Pax.	Type **PAX:** .
Please enter exchange rate.	Type the rate.
Please add at least one trip.	Click **Add** .
Please select travel date. (trip ...	Fill that trip.
You are not allowed to confirm service (transport) vouchers.	Save as Reserved.

Requests and trips

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter the Checkout date.	Set **Checkout:**.
Enter the Hotel.	Set **Hotel:**.
Enter the Contact No.	Type it.
Select a valid Sector.	Choose **Sector:**.
Please set the trip date.	Set the date.
Please select the transporter or service provider.	Choose one.
Seats and amounts cannot be negative.	Fix values.

SECTION 7

7 Quick checklist

Setup

- [ ] Routes with kinds
- [ ] Types and vehicles
- [ ] Rates per route and type

Day of travel

- [ ] Vehicles assigned
- [ ] Outsource trips attached
- [ ] Dispatch Board has no Unassigned

Voucher

- [ ] Transporter and customer
- [ ] Guest and PAX
- [ ] Every trip with date, time, type, route
- [ ] Totals checked

Trainee name _____ Date _____ Trainer _____