DATA ENTRY TRAINING

Arch Travel CRM

Module 3 — Umrah Groups & Packages

Make group packages from an Excel file, register reservations and ticket-only seats, transfer mutamers, and issue Partner API keys.

TRAINING GUIDE · SIMPLE ENGLISH

GROUP MAKER | PACKAGES | REGISTER | RESERVATIONS | GROUP TICKETS | TRANSFER | PARTNER API | 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 **Umrah Groups & Packages** 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

Umrah Groups are ready-made packages with fixed travel dates, flights, hotels and seats. You create them with the **Group Maker** from an Excel file. Customers (or your staff) then book seats as **Umrah Reservations**. Partners can book through the **Umrah Groups API** with a key you issue.

MENU PATH

Umrah top menu → **Umrah** menu group → **Umrah Groups / Packages / Reservations / Group Maker**

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Umrah → Umrah	Umrah Groups · Umrah Packages · Umrah Reservations · Group Maker
Umrah → Booking Import	Nusuk Import to Reservation
Umrah → Advance	Transfer Mutamer - Reservation
Tickets → Ticket Groups	Umrah Group Tickets
Admin → CRM & Customers	Umrah Groups API Keys
Admin Backend → Groups	Groups · Packages · Reservations · Price Adjustment · API List

HOW THE WORK FLOWS

Group Maker Excel file → group + packages → **Umrah Groups** Search packages → **Register** Reservation with passports → **Reservations** Confirm, voucher

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	Admin Backend → Umrah → Setup → Hotels	Makkah Hotel and Medinah Hotel names in the file must match.
Airlines and sectors	Admin Backend → Contacts → Airlines; Umrah → Setup → Sectors	Airline and sectors such as LHE-JED.
Customers	Admin → New Customer	Reservations need a customer. For API or portal use tick **Allow Umrah Group Reservation** on the customer.
Exchange rate	In the package file	The file must give an Exchange Rate.

SECTION 3

3 Step-by-step data entry

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

Part A — Make a group with the Group Maker

Open **Umrah → Umrah → Group Maker** (also the **New Package** button on Umrah Packages).

Umrah Group Maker

1 Download the template
Click **Sample template**. The file is *umrah_group_package_file.xlsx*.

2 Fill the group columns
Group Title, Travel Date, Return Date, Airline, Departure Flight No, Departure Sector (e.g. LHE-JED), Departure ETD, Departure ETA, Arrival Flight No, Arrival Sector, Arrival ETD, Arrival ETA, Baggage, Group Seats.

3 Nights and city
Makkah Nights, Medinah Nights and First City (Makkah or Medinah). Exchange Rate is required.

4 One row per package
Package, Makkah Hotel, Medinah Hotel, Seats and the prices: Sharing, Quad, Triple, Double, Quint, Child Without Bed, Infant.

5 Load File
Click **Load File** and choose the .xlsx or .csv file. Errors are listed.

6 Choose what to do
If a package already exists choose **Skip**, **Update existing** or **Create anyway**. If some rows have errors you can choose **Make group with the valid packages only**.

7 Make Group
Click **Make Group**. Message: *Group created successfully.*

⚠ **WARNING**
No Group Seats or package Seats are given: the group is made with 0 seats. Fill Group Seats or Seats.

Part B — Find packages and register a reservation

Umrah Groups (package search)

1 Search

Open **Umrah Groups**. Use the search box (package, hotel, airline or group code), Sector, Travel date and Duration, then Search.

2 Filter and sort

Use **Seats needed**, Airlines, Makkah hotel, Madinah hotel and the sort buttons (Cheapest, Nearest, Most seats).

3 Book

Open the package and choose a room price to register.

Register Umrah Package

1 Customer and Family Head

Choose Customer: (type to search) and type the Family Head: name.

2 Room Type and PAX

Choose Room Type: (Sharing, Quad Bed, Triple Bed, Double Bed, Quint Bed, Six Bed) and PAX:. Check the Travel Date:.

3 Passengers

For each person fill Passport No, Issue, Expiry, Surname, Given Name, Gender and DOB. Tick Child Without Bed or Additional Baggage if needed.

4 Notes and terms

Add Notes: (the form asks for it). Tick I Accept all the Terms & Conditions.

5 Register

Click Register. A reservation number is created.

Part C — Group ticket-only seats

Umrah Group Ticket Reservation

1 Choose the group
Open **Tickets → Umrah Group Tickets** and pick a group with seats.

2 Customer and passengers
Choose `Customer`, type `Family Head`, and the number of `Adults`, `Childs` and `Infants`.

3 Terms and register
Tick `I have read and agree to the terms and conditions` and click `Register`.

> **NOTE**
> *Each infant must travel with an adult.*

Part D — Manage reservations, imports and transfers

Umrah Reservations

1 Search
Open **Umrah Reservations**. Filter by `Reservation No`, `Customer`, `Group`, `Package`, dates, `Type` (Full Package, Ticket Only), `Status` (On hold, Confirmed, Cancelled), `Voucher created`, `Family Head`, `Booking source` (Application, API, Website). Click `Search`.

2 Open
Use `Action` on the row to open the reservation and its **Mutamers**.

Nusuk Import to Reservation

1 File
Open **Umrah → Booking Import → Nusuk Import to Reservation**. Choose the `File:`; rows show in **Work Sheet**.

2 Details
Optional `IATA:`, `Group No.`, `Group Name.`, `Approval Date:`. Click `Import Mutamers`.

3 Add to reservation
Tick people in **Status**, choose the reservation in `Booking:` and click `Add PAX to Booking`. `Remove Selected` removes wrong rows.

Transfer Mutamers (reservation)

1. **Step 1**
   Choose the source **Reservation:**, click **Search** and tick the mutamers.

2. **Option 1**
   Choose another reservation in Step 2 and click **Transfer**.

3. **Option 2**
   Or split them into a new reservation: choose **Package:** and **Room Type:** and click **Reservation Split**.

   > ⚠ **WARNING**
   > *At least one mutamer must stay in reservation ...*

Part E — Partner API keys (basics)

Open **Admin → Umrah Groups API Keys**. Only administrators can issue keys.

Umrah Groups API Keys

1. **Find the customer**
   Type in **Customer ID or name** and click **Search**.

2. **Issue key**
   Click **Issue key** (or **Replace key** if one exists).

3. **Copy the key**
   A new key was issued. Copy it now, or open the documentation with the key. It is not stored in readable form. Use **Open documentation with key** to give the partner a printable guide (Download PDF).

4. **Revoke**
   Click **Revoke** to stop a key at once.

> ⚠ **WARNING**
> The customer must be active, not blocked, and have **Allow Umrah Group Reservation** ticked, or API calls are refused.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Group Maker file (columns)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Group Title	Name of the group.	Yes
Travel Date	Departure date.	Yes
Return Date	After the Travel Date.	No
Airline / flight / sector / ETD / ETA columns	Sectors as two airport codes, e.g. LHE-JED.	No
Group Seats / Seats	Seats for group and package.	No
Makkah Nights / Medinah Nights	At least one.	Yes
First City	Makkah or Medinah.	No
Exchange Rate	Rate for prices.	Yes
Package / Makkah Hotel / Medinah Hotel	Package row.	Yes
Sharing / Quad / Triple / Double / Quint / Child Without Bed / Infant	Prices.	No

Register Umrah Package

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer:	Search and pick.	Yes
Family Head:	Main contact.	Yes
Room Type:	Room type.	Yes
PAX:	Number of people.	Yes
Travel Date:	Travel date of the package.	Yes
Passport No / Issue / Expiry / Surname / Given Name / DOB	Per passenger. Check against the passport.	No
Child Without Bed / Additional Baggage	Options.	No
Notes:	Requests or booking notes. The form marks it required.	Yes
I Accept all the Terms & Conditions	Must tick.	Yes

Umrah Group Ticket Reservation

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer	Customer.	Yes
Family Head	Name.	Yes
Adults / Childs / Infants	Numbers.	Yes
I have read and agree to the terms and conditions	Must tick.	Yes

Transfer Mutamers

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Reservation: (Step 1)	Source.	Yes
Reservation: (Step 2)	Target (Option 1).	No
Package: / Room Type: (Option 2)	For a split.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find packages	**Umrah → Umrah Packages**: filter Package Code, Group Code, Makkah Hotel, Madinah Hotel, Active and click Search.
Find reservations	**Umrah Reservations** (Part D).
Change group prices	Admin Backend → Groups → Price Adjustment, or re-load the file with **Update existing**.
API partner guide	Admin → Umrah Groups API Keys → documentation → Download PDF.

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.

Group Maker

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select a package file first.	Choose the file, then **Load File**.
Select an Excel file (.xlsx) or a .csv file.	Use the template format.
The package file has errors. Correct them and try again.	Fix the rows listed.
Group Title is required.	Fill Group Title.
Travel Date is required.	Fill Travel Date.
Return Date must be after the Travel Date.	Fix the dates.
First City must be Makkah or Medinah.	Use one of the two.
Exchange Rate is required.	Fill Exchange Rate.
Enter the Makkah Nights and / or Medinah Nights.	Fill the nights.

Reservations and tickets

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Customer is required. / Family head is required. / Room type is required. / PAX is required. / Travel date is required. / Notes are required.	Fill the field shown in red on Register Umrah Package.
Please provide Family Head name.	Type **Family Head:**.
Please select Room Type.	Choose **Room Type:**.
Please select a customer.	Choose **Customer**.
Please accept the terms and conditions.	Tick the terms box.
Select at least one passenger.	Enter passengers.
Each infant must travel with an adult.	Add an adult.
This customer is blocked from booking this group.	Ask your manager.
No seats are available in this group.	Choose another group.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
No ticket-only seats are left on this stock.	Choose another group.

Transfer and import

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select reservation from step 1 and click Search.	Pick the source reservation.
Please select Mutamers from grid in Step 1.	Tick people.
Select a different reservation in step 2; the mutamers are already in this reservation.	Pick another target.
Please select the Package for the new reservation.	Choose **Package:**.
Please select the Room Type for the new reservation.	Choose **Room Type:**.
Please select Booking!	Choose the reservation in **Booking:**.
Please select the mutamers to add in the Status list.	Tick rows in Status.

API keys

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Enter a customer ID or part of the name.	Type in the search box.
No customers matched.	Try another name.

SECTION 7

7 Quick checklist

Group file

- [ ] Template used
- [ ] Title, dates, nights, exchange rate filled
- [ ] Hotel names match setup
- [ ] Seats filled

Reservation

- [ ] Right customer and room type
- [ ] Passports, expiry and DOB checked
- [ ] Terms ticked

API

- [ ] Customer allowed group reservations
- [ ] Key copied once and sent securely
- [ ] Old key revoked

Trainee name _____ Date _____ Trainer _____