DATA ENTRY TRAINING

Arch Travel CRM

Module 2 — Umrah Vouchers & Accommodation

Turn a booking into an Umrah voucher, make accommodation-only vouchers, assign mutamers, print and export.

TRAINING GUIDE · SIMPLE ENGLISH

CREATE VOUCHER | VOUCHER DETAIL | ACCOMMODATION | ASSIGN MUTAMERS | PRINT & EXPORT | ERRORS | CHECKLIST

For trained staff and customers

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How to use this guide

This guide teaches you to enter data in the **Umrah Vouchers & Accommodation** 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

An **Umrah Voucher** is the travel document for a booking: mutamers, hotels, flights, transport and ziarat. You create it from a booking in two steps (choose mutamers, then fill the voucher). An **Accommodation Voucher** is a hotel-only voucher with no mutamer list. Vouchers are saved as **Draft** or **Approved**, and can be **Void**.

MENU PATH

Umrah (top menu) → **New Umrah Voucher** (Voucher group)

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Umrah → Voucher	**Umrah Voucher List** **New Umrah Voucher** **Accommodation Voucher** **Voucher Export**
Umrah → Advance	**Assign Mutamers to Voucher**
Umrah Booking List	row action **Create Voucher** / **Print Voucher**

HOW THE WORK FLOWS

Booking (Mutamers and package) → **Create Voucher** (Pick mutamers) → **Voucher** (Hotels, flights, transport) → **Approve & print** (Draft → Approved)

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
Umrah booking	Umrah → New Umrah Booking	Vouchers are made from a booking with mutamers.
Hotels and rates	Reservation → Hotel List	Hotel lines, **Rate** and availability.
IATA and visa company	Admin Backend setups	**IATA:** and **Visa Company:**.
Voucher rights	Customer / role settings	Approved save mode and *Allow Star Voucher*.

SECTION 3

3 Step-by-step data entry

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

Part A — Create a voucher from a booking

Open **Umrah → Umrah Booking List** (or **New Umrah Voucher**). Find the booking. Its **Voucher Status** shows *Pending*.

Booking list

1 **Create Voucher**
Open the row actions and click **Create Voucher**. (When a voucher already exists the action is **Print Voucher**.)

New Voucher Mutamers

1 **Pick mutamers**
Tick the mutamers (Passport, Mutamer Name) to put on this voucher.

2 **Create**
Click **Create Voucher**. You see *Voucher created for {0} mutamer(s).* and the voucher form opens.

NOTE
Creating the voucher sets the booking status to **Final**.

Part B — Fill the voucher

Voucher — header

1. **Numbers**
   `Booking No:`, `Date:`; type `Manual/Service No:` if you use paper numbers.

2. **Who**
   `Customer:`, `Branch:`, `Package:`, `IATA:`, `Visa Company:`. Optional `Customized Name on Voucher:`.

3. **Options**
   Tick `Self Accommodation` if the guest has own hotel. Choose `Travel By:`. Tick `Ziarat:` `Makkah` / `Madina`.

4. **Contact**
   `WhatsApp No:` and `Notes:`.

Voucher Detail — grids

1. **Mutamers**
   Check Passport No, Mutamer Name, DOB, PAX, Family Head, Bed, PNR, Visa Number, Visa Rate.

2. **Hotels**
   Fill each **Hotel** line: room type, quantity, check-in, nights, check-out, view, meal plan, rate.

3. **Flights**
   Flight, No, FROM, TO, Date, ETD, ETA.

4. **Transport**
   Transporter, Travel Date, Transport Route, Transport Type.

Voucher — save

1. **Star / VIP**
   Tick `Star Voucher:` or `★ Priority / VIP` if needed.

2. **Uploads**
   Attach files under `Uploads:` (PDF, JPG or PNG).

3 **Save Mode**

Choose **Save Mode:** **Draft** or **Approved** and click **Save**. You see *Voucher saved as ....*

Part C — Accommodation Voucher (hotel only)

Open **Umrah → Accommodation Voucher**.

Voucher, Agent & Guest

1. **Voucher**
   Voucher No:, Date:, Manual No:, IATA:.

2. **Guest**
   Customer: *and* *Passport No:* are **required**. Family Head:, Customized Name on Voucher:, Contact / Mobile:, Group Name:.

3. **Pax**
   Adults:, Childs:, Infants:; Total Pax: and Beds: fill. Choose Package:.

Hotel & Room Details

1. **Tick a hotel**
   Tick **Makkah** and/or **Madina** and choose the hotel.

2. **Room line**
   Room Type, Qty, Checkin, Nights, Checkout, Confirm No, View Type, Meal Plan, Excl Night., Status.

3. **Rates**
   Rate loads from the rate list (*No rate* if none). Total Amount is calculated.

Flights, transport and save

1. **Flights**
   Tick Allow Flight Information to add flights.

2. **Transport**
   Add Transporter, Travel Date, Transport Route, Transport Type, BRN, Amount.

3. **Save**
   Type Notes:, choose Save Mode: (Draft / Approved / Void) and click Save. You see *Voucher saved successfully!*

Part D — Assign mutamers, print and export

Assign Mutamers to Voucher

1 **Step 1**
Choose **Customer:** and click **Search**. Tick the mutamers (Passport, Mutamer Name, PAX, Visa No, Group Name).

2 **Step 2**
Choose the **Booking:**. Tick **Delete existing PAX** only to replace the current list. Click **Assign**.

Print

1 **Print Voucher**
From the list click **Print Voucher**, then **Print Voucher** on the page.

Voucher Export

1 **Export**
Choose **Export Type:**, **Check Field:**, **Date From:**, **Date To:**, optional **Exclude:**; click **Show**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Voucher (from booking)

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Booking No: / Date:	From the booking.	Auto
Manual/Service No:	Paper number.	No
Customer: / Branch: / Package:	Booking details.	Yes
IATA: / Visa Company:	Agent and visa company.	No
Self Accommodation / Travel By: / Ziara	Options.	No
WhatsApp No: / Notes:	Contact.	No
Star Voucher: / Priority / VIP	Flags.	No
Save Mode:	Draft or Approved.	Yes

Accommodation Voucher

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Date:	Voucher date.	Yes
IATA:	Agent.	Yes
Customer: *	Customer.	Yes
Passport No: *	Lead guest passport.	Yes
Adults: / Childs: / Infants:	At least one.	Yes
Hotel line	At least one ticked hotel.	Yes
Rate / Total Amount	From rate list.	Auto
Save Mode:	Draft / Approved / Void.	Yes

Assign Mutamers

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Customer:	Step 1.	Yes
Mutamers	Ticked rows.	Yes
Booking:	Step 2.	Yes
Delete existing PAX	Replace list.	No

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Find vouchers	**Umrah Voucher List**: Voucher No, Customer, Branch, dates, status (Draft, Approved, Void), group, package, hotels, room type; **Search**.
Change status	Use **Action** on the list to approve, void or print.
Uploads	Voucher uploads take PDF, JPG or PNG only.

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.

Voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please choose a Save Mode (Draft or Approved).	Choose **Save Mode:**.
This booking is locked and cannot be changed.	Ask a manager.
Your account is not allowed to save vouchers as ...	Save as Draft.
This customer is not allowed Star vouchers (Allow Star Voucher is not ticked).	Untick Star or update the customer.
Invalid booking reference.	Open from the booking list.

Accommodation voucher

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select the voucher date.	Set **Date:**.
Please select an IATA.	Choose **IATA:**.
Please select a customer.	Choose **Customer: ***.
Please enter the passport no.	Type **Passport No: ***.
Please enter the number of adults, childs or infants.	Type counts.
Please tick at least one hotel and fill in its details.	Tick Makkah or Madina.

Assign and export

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Please select customer in step 1 to display Mutamers.	Choose customer.
Please select Mutamers from grid in Step 1.	Tick mutamers.
Please select booking from step 2 to transfer Mutamers.	Choose booking.
All selected passports are already in booking ...	Nothing to add.
Enter Date From and Date To.	Set dates.

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Only PDF, JPG or PNG files can be uploaded.	Change file type.

SECTION 7

7 Quick checklist

Before save

- [ ] Right mutamers picked
- [ ] Hotels with dates and rates
- [ ] Flights and transport
- [ ] Save Mode chosen

After save

- [ ] Voucher Status not Pending
- [ ] Approved when final
- [ ] Printed for the guest
- [ ] Uploads attached

Trainee name _____ Date _____ Trainer _____