DATA ENTRY TRAINING

Arch Travel CRM

Module 17 — WhatsApp

Link the office WhatsApp number to the CRM, send messages, read recent chats and sync Umrah groups.

TRAINING GUIDE · SIMPLE ENGLISH

START SERVICE | LINK A DEVICE | SEND A MESSAGE | CHATS & GROUPS | 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 **WhatsApp** 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 **WhatsApp** page connects one office WhatsApp phone to the CRM through a small service on the server. Once linked, staff can send a message to any number, read recent chats and see the Umrah WhatsApp groups.

MENU PATH

Admin top menu → **WhatsApp** menu item

You will use these menu items in this guide:

MENU GROUP	ITEMS USED IN THIS GUIDE
Admin → WhatsApp	WhatsApp

HOW THE WORK FLOWS

Install Service packages → **Start** Service running → **Link** Scan QR with phone → **Use** Send, chats, groups

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
Node.js on the server	Server (IT)	*Install did not finish. Node.js must be installed on this server.*
WhatsApp service settings	Web.config (IT)	Without them: *WhatsApp service settings are missing from Web.config.*
Office phone with WhatsApp	Your office	To scan the QR code.
Access	Roles & Permissions	Else *Access denied.*

SECTION 3

3 Step-by-step data entry

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

Part A — Install and start the service

Open **Admin → WhatsApp**. The top shows the status (*Not connected*, *The service is stopped.* etc.).

Service

1. **Install (first time)**
   Click **Install**. Wait for *WhatsApp packages are installed.*

2. **Start**
   Click **Control** to start or stop the service. You see *WhatsApp service is starting. The QR code appears in a few seconds.*

3. **Restart**
   If it hangs, click **Restart Service**.

Part B — Link a device

Link a device

1. **Scan**
   On the office phone open WhatsApp → **Linked devices** → **Link a device** and scan the **WhatsApp QR code**.

2. **New code**
   If the code expired click **New QR code**.

3. **Disconnect**
   Disconnect unlinks the phone. Stopping the service keeps the phone linked.

Part C — Send a message, chats and groups

Send a message

1. **Number**

Type **Phone number with country code** with no + or spaces, e.g. 923001234567.

2 **Message**
Type the **Message** and click **Send**. You see *Message sent.*

Recent chats and Umrah groups

1 **Chats**
Click a chat in **Recent chats** to read **Messages**.

2 **Groups**
Click **Sync Groups** to load WhatsApp groups. Search **Umrah groups**.

SECTION 4

4 Field tables for every screen

Field names are written exactly as on screen.

Send a message

FIELD (AS ON SCREEN)	WHAT TO ENTER	REQUIRE
Phone number with country code	e.g. 923001234567.	Yes
Message	Text.	Yes

SECTION 5

5 After you save: find, edit, print

TASK	HOW
Check status	The status line shows connected / not connected.
Keep running	Start the service after a server restart.

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.

Service

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Install the WhatsApp packages first.	Click **Install**.
Install did not finish. Node.js must be installed on this server.	IT installs Node.js.
The WhatsApp service could not start.	Try **Restart Service**; tell IT.
The WhatsApp service is not running. In the whatsapp-service folder, run start-whatsapp.cmd.	Start it (IT) or click **Control**.
WhatsApp service settings are missing from Web.config.	IT adds settings.
The WhatsApp service folder was not found.	IT checks install.

Sending

MESSAGE ON SCREEN	WHAT IT MEANS AND HOW TO FIX IT
Message was not sent.	Check number and connection.
Not connected.	Link the phone again.
WhatsApp could not be reached.	Check service and internet.
Access denied.	Ask for permission.

SECTION 7

7 Quick checklist

Setup

- [ ] Packages installed
- [ ] Service running
- [ ] Phone linked

Every message

- [ ] Number with country code
- [ ] *Message sent.* shown

Trainee name

Date

Trainer