Caxita Tech Solutions Pvt. Ltd.

CORPORATE BOOKING TOOL

USER DOCUMENTATION

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CBT Documentation

Purpose:

This documentation serves as a reference for understanding and utilizing the Caxita Corporate Booking Tool (CBT) functions to manage corporate clients.

Introduction (CBT)

In today's dynamic and globally connected corporate landscape, efficient management of employee travel is a strategic necessity rather than an administrative task. Large organizations often oversee extensive travel activities involving multiple departments, regions, and budgets. Without a unified solution, managing these activities can lead to inefficiencies such as fragmented processes, lack of visibility, and unnecessary costs. The Corporate booking Tool is an advanced enterprise solution designed to digitize, centralize, and optimize every aspect of corporate travel management. It serves as an end-to-end platform that integrates travel planning, booking, approvals, and analytics within a single, cohesive environment. By leveraging automation, workflow intelligence, and real-time reporting, CBT enables organizations to enforce travel policies, , and gain strategic insights into travel behavior and spending patterns. Beyond operational efficiency, CBT is a strategic business tool that supports corporate governance, financial control, and employee satisfaction. It ensures policy compliance, minimizes manual intervention, and provides management with actionable data to support decision- making and cost optimization.

Work Flow

This workflow outlines the mandatory sequence of steps to configure a new corporate , from initial creation in the Back Office to full user onboarding in the Corporate Admin panel.

Booking Engine Admin Branch Unit Creation Main Branch Setup Booking Engine Admin Supplier & Payment Gateway Configuration (Against Branch)

Corporate Admin Panel (Super-admin logs in) Add Corporate User (corporater user logs in) Region setup Region user(logs in) Company Structure(department) Organization Setup (Roles and Permissions,Designation,Hierarchy, Purpose of travel, Travel policy) Employee & Dependent On-boarding Approval Workflow Execution.

Phase 1: Core Client Setup (CBT Back Office)

Step	Action	CBT Administration Workflow: End-to-End Setup Purpose
1	Create Branch Unit	Establishes the main corporate client (e.g., ‘FedEx’) and defines its financial limits (Credit Limit).
2	Create Main Branch	Next, create the Main Branch (e.g.,FedEx Dubai ,FedEx Kuwait). This action links these physical offices directly to the main company established in step 1
3	System Management - API Management	Map each main branch to the respective APIs. In Supplier Configuration, enable the providers that need to be displayed on the front end.
4	Transition to Corporate Admin	Log into the Corporate Admin portal to continue the setup.

Phase 2: Building the Organization (Corporate Admin)

Step	Action	Menu Path	Key Requirement
5	Logs in as Super Admin and add Corporate User	Add the corporate user and link them to the newly created Branch Unit.	This is the initial user required to perform further process
6	Create Region, Regional Unit	Use the Automatic Option (YES) to quickly create Region and Regional Unit with inherited credit limits . Manual Option (NO) manually the regions and the regional units can be created	Structural divisions
7	Region User	The region user is auto-created, whereas the region and region unit can be created automatically or manually.	Password and username can’t be edited
8	Logs in as region user and add Department	Create departments (e.g., 'Operations','finance'). MUST be mapped against a specific Regional Unit.	Password and username can’t be edited

Phase 3: Defining Rules and Roles (Organization Setup)

This phase establishes the access controls and the approval flow structure.

Step	Action	Menu Path	Purpose
9	Create Roles & Permissions	Define system Access Roles (e.g., 'Approver') and their specific permissions.	Controls what a user can see and do within the system.
10	Create Designation	Define all official Job Titles (e.g., 'Senior Manager') that employees will hold.	Provides the titles required for the hierarchy flow.
11	Create Hierarchy Flow	Define the Approval Workflow sequence, which is built against each Department using the created Designations.	Establishes the mandatory chain of approval for all requests.
12	Purpose of Travel	Define the travel purpose.	Defines the reason for travel, enabling policy compliance, approvals, and accurate reporting

Phase 4: Employee Onboarding

This is the final of assigning all users into the fully defined structure.

Step	Action	Menu Path	Purpose
5	Onboard Corporate Employees	Complete all Profile, Credentials for each user.	CRITICAL: Onboard the Highest Authorized Person First. (The Reporting Manager must exist before their subordinates are onboarded).
6	Assign Role & Reporting	Link the employee to the correct Department, Designation, Role, and most importantly, the existing Reporting Manager.	Makes the user Active and places them correctly within the hierarchy and approval workflow.

Request & Approval

1. Employee sends a Travel Request

› Employee submits travel details through the system.

› Request enters approval queue

2. Approver reviews request in Corporate Admin Panel

› Approver can **Approve** or **Reject** the request.

3. If Rejected

› Employee receives rejection notification.

› Workflow ends.

4. If Approved

› Employee is notified to proceed.

› Employee logs in to **Corporate Booking Tool (CBT).**

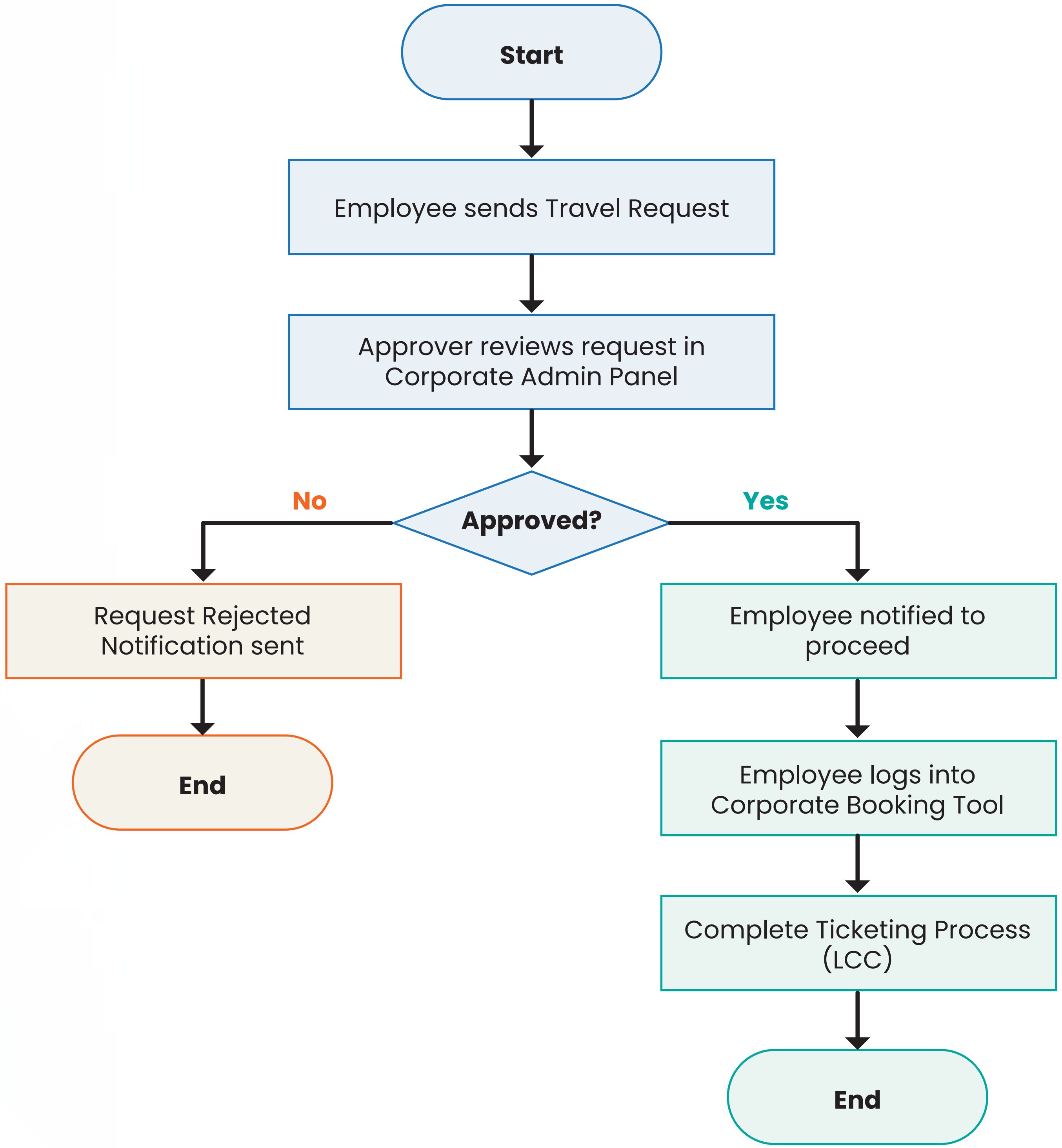
5. Employee completes ticketing (LCC)

› Flight selection

› Passenger details

› Payment / reference validation

› Ticket issuance



GDS Bookings

1. Employee sends a Travel Request

- Employee submits travel details through the system.
- System creates the booking in GDS.
- Booking is placed on Hold and a GDS PNR is generated.
- Request enters the approval queue with the held PNR

2. Approver reviews request in Corporate Admin Panel

- Approver reviews booking details
- Approver can **Approve** or **Reject** the request

3. If Rejected

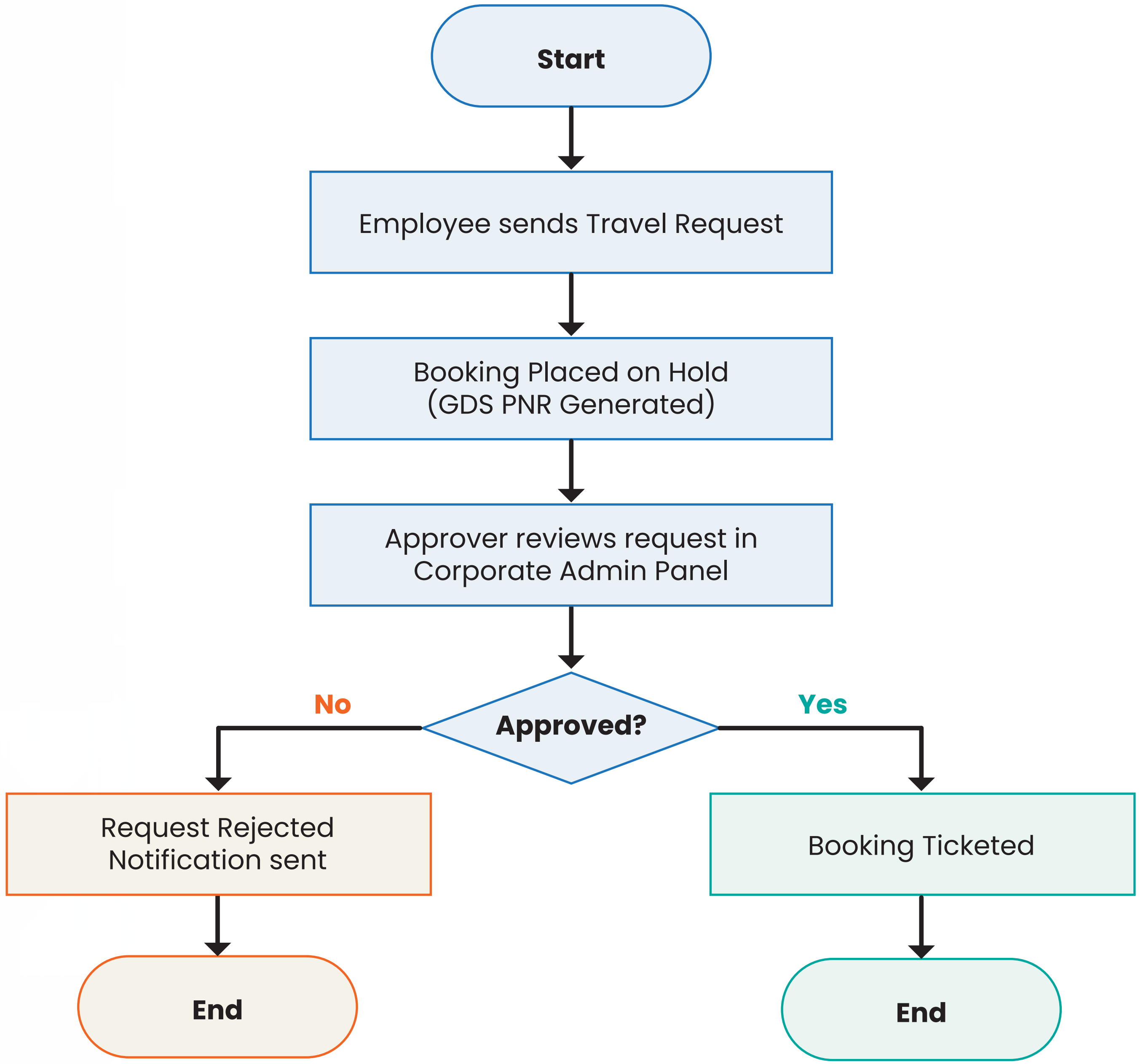
- Booking is cancelled from GDS hold.
- Employee receives rejection notification
- Workflow ends.

4. If Approved

- Booking is automatically sent for ticketing.
- System proceeds with ticket issuance directly from GDS.
- Employee receives confirmation notification.

5. Employee completes ticketing (LCC)

- Ticket is issued against approved PNR.
- Booking status is updated as **Ticketed**.
- Workflow ends.



Key Difference from LCC Flow

- In GDS flow, booking is **held before approval** (PNR generated).
- After approval, **no manual login or action is required by employee**.
- Ticketing happens **automatically upon approval**.

LCC & Quote Requests:

Ticketing is completed by the employee after approval.

The employee initiates and submits a travel request through the Corporate Booking Tool (CBT), which is then routed to the Approver in the Corporate Admin Panel for review and action. The approver can either approve or reject the request.(for LCC,Approval and Quote request) Once the request is approved, the employee must log in to the CBT,click on My booking section , choose the approved transaction and click book now button from there inorder to proceed with and complete the ticketing process.

Back Office Admin Guide

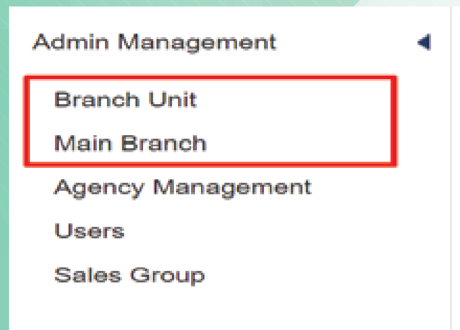
Part 1: CBT Back Office Control Panel Overview

The CBT Back Office provides the necessary control panels to manage all operational, financial, and content aspects of the platform.

Control Panel	Description	Key Functions
1. Online Booking Management	Access to various travel transactions.	Manage Flight, Hotel, Transfers, Activity,car rental,rail bookings made across the platform.
2. Fare Management	Module for defining pricing rules, margins, and currency exchange.	Configure Markups, Discounts, and Currency Conversion rates applied to transactions.
3. Reports Management	Provides access to financial and operational data across all clients.	Centralized Reporting Access-Sales Report,Passenger Sales Report,Account Summary Report, Invoice Payment Status Management
4. Admin Management	(Core Setup) Manages the organizational structure, user access, and client accounts (Branches).	Creation of Branch Units, Main Branches
5. System Management	Technical configuration of external services and core system settings.	API Management and Supplier Configuration (connecting to GDS, LCCs, etc.).

Part 2: Initial Setup: Admin Management (Branch & Main Branch)

STAGE - 1



On-boarding of corporate clients

Create branch unit

Main branch

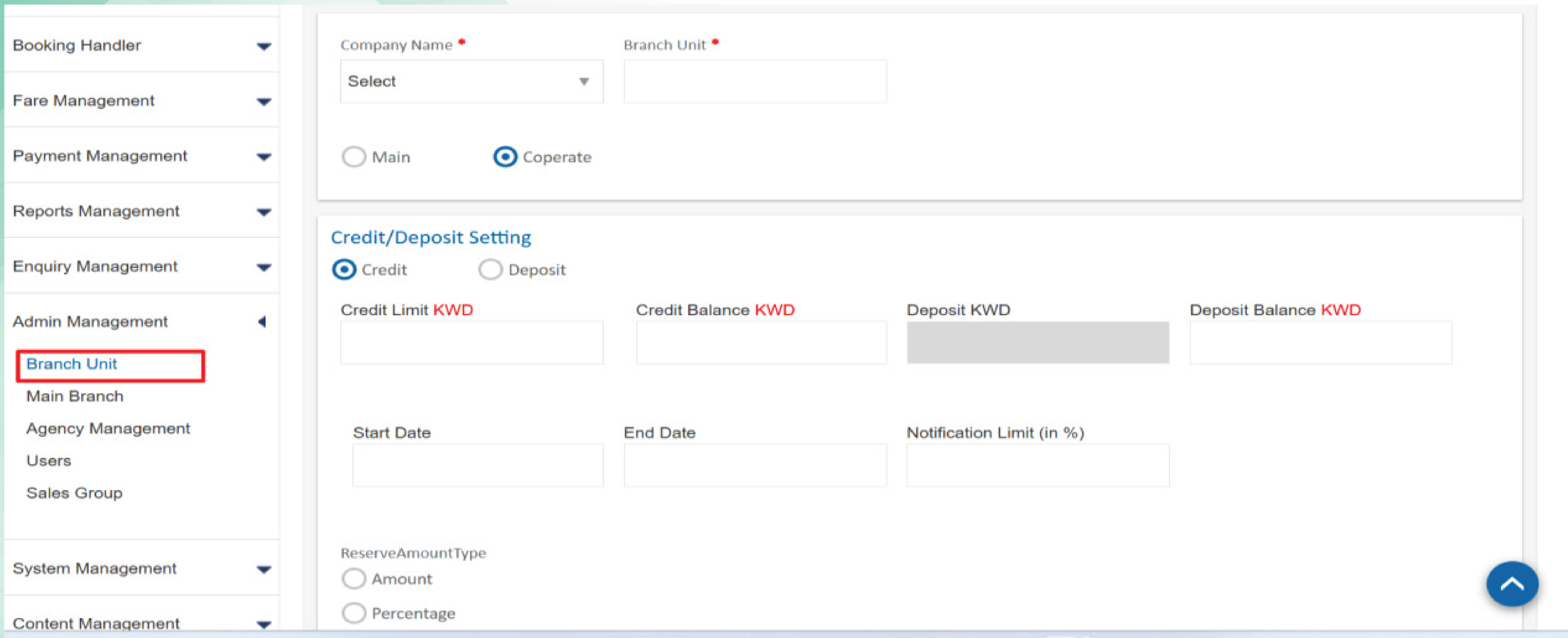
A. Step 1: Creating a Branch Unit

The Branch Unit form defines the top-level entity. Here, Onboards the corporate clients.

Field / Option	Usage and Description
Company Name	The operating entity (Qgo).
Branch Unit	Enter the name for the new branch (e.g., 'FedEx').
Type (Main/Corporate)	**Main:** Used for the central operating entity (Qgo). **Corporate:** Used for corporate clients who book travel (e.g.FedEx).
Credit Setting	Defines the financial terms of the branch. **Crucial for controlling client spending**.
Credit Limit	The maximum credit amount extended to this branch.
Credit Balance	Displays the real-time available credit for the branch.

Field / Option	Usage and Description
Period /Duration	Defines the validity period for the credit.
Notification Limit (in %)	The percentage threshold at which a notification email is sent regarding nearing the credit limit.
Reserve Amount Type	Select whether the remaining amount is tracked as an **Amount** or a **Percentage.**
Subdomain url	Allows to set subdomain for corporate
Branch logo	Allows the user to upload and set a logo specific to the branch. The selected logo will be displayed in branch(corporate panel)
Is Active	Check Is-Active to activate the branch unit.

Note : *The Reserved Amount is intended to be a separate pool, meaning it can be used directly for business travel without waiting for the employee/department allocations to be emptied or It can be used even if the amounts allocated to departments or employees are not yet empty. It acts as a separate, central pool of funds.*



Step 2: Creating a Main Branch

The Main Branch form is used to categorize the branches under branch unit and configure the operational and contact details for the established branch .This setup requires filling out distinct sections: **Company Details**, **Contact Details**

Company Details

Field / Option	Usage and Description
Company Name	Select the parent company from the dropdown.
Branch Unit	Select the Branch Unit name created in Step 1.
Main Branch Name	The specific name of this entity (e.g., 'FedEx Kuwait').
Address Line City Code	Geographical details for contact
Currency Code	The primary operational currency for this main branch (e.g., KWD).
Countries	Select the countries this Main Branch is authorized to operate in or book travel for. Use the arrow buttons to move countries between the available list and the selected list.
Agency Types	Define the operational role of this Main Branch **(Travel Agent)**.

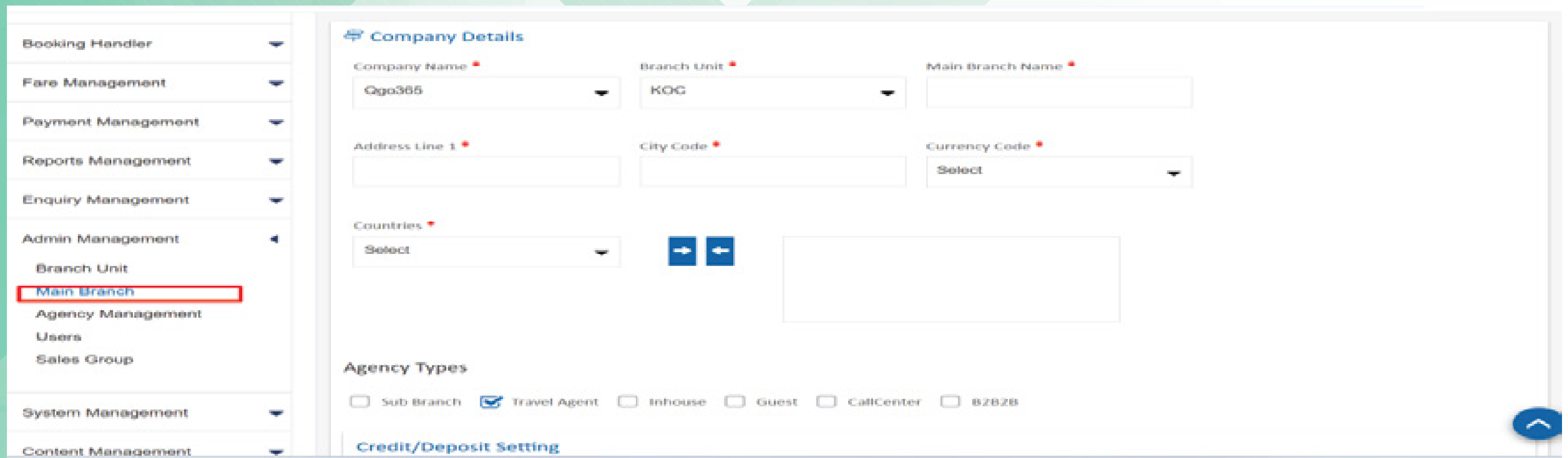
Contact Details & Settings

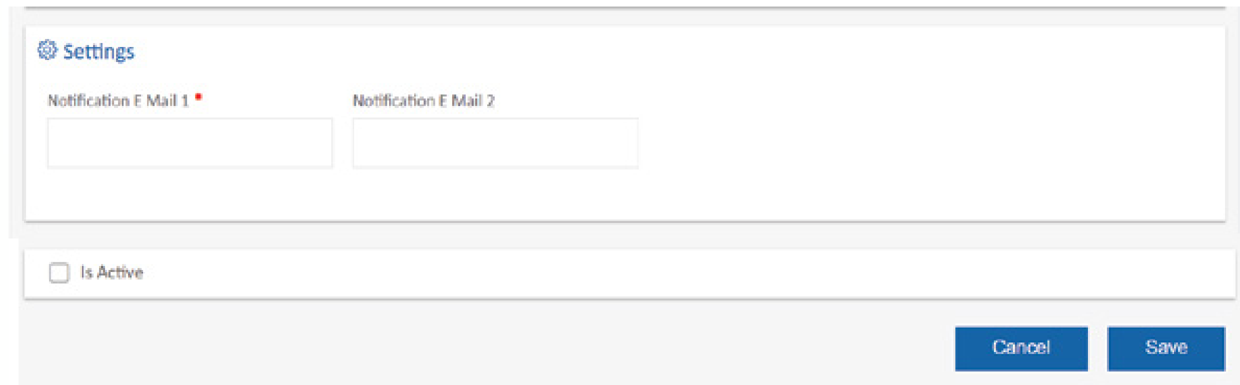
This section is vital for system notifications and support.

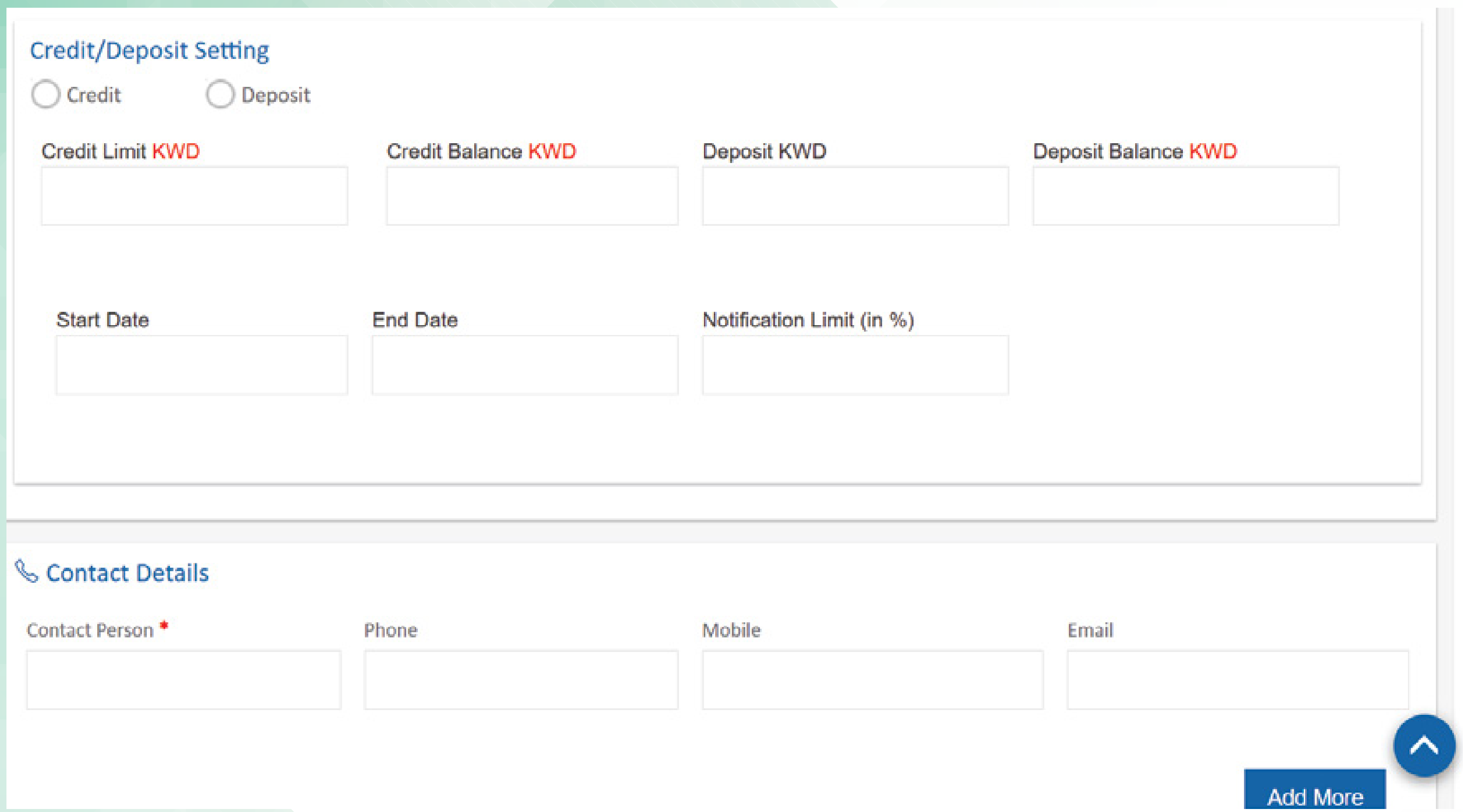
Field / Option	Usage and Description
Contact Person	The primary point of contact for this Main Branch.
Phone, Mobile, Email	Corresponding contact details. Use the Add More button to input multiple contact persons.
Notification E Mail 1	**Mandatory**. The primary email address for receiving critical system alerts, booking confirmations, and financial notifications.
Notification E Mail 2	A secondary or backup email address for alerts.

IS ACTIVE -if checked ,means active for use

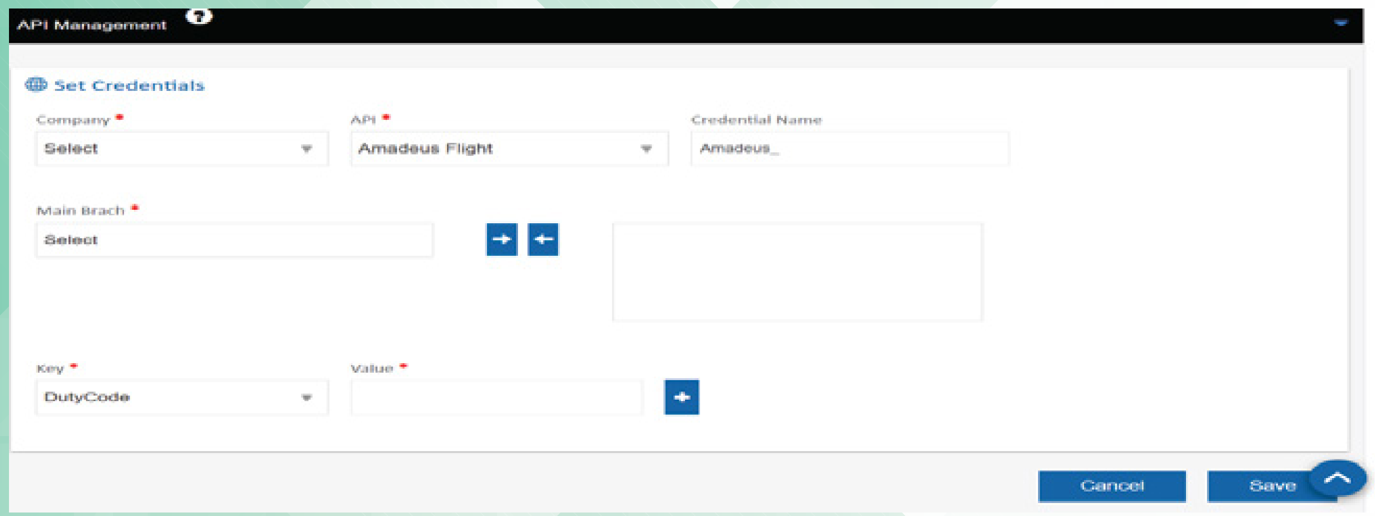
After filling all required fields across the three sections, click Save to create the Main Branch.





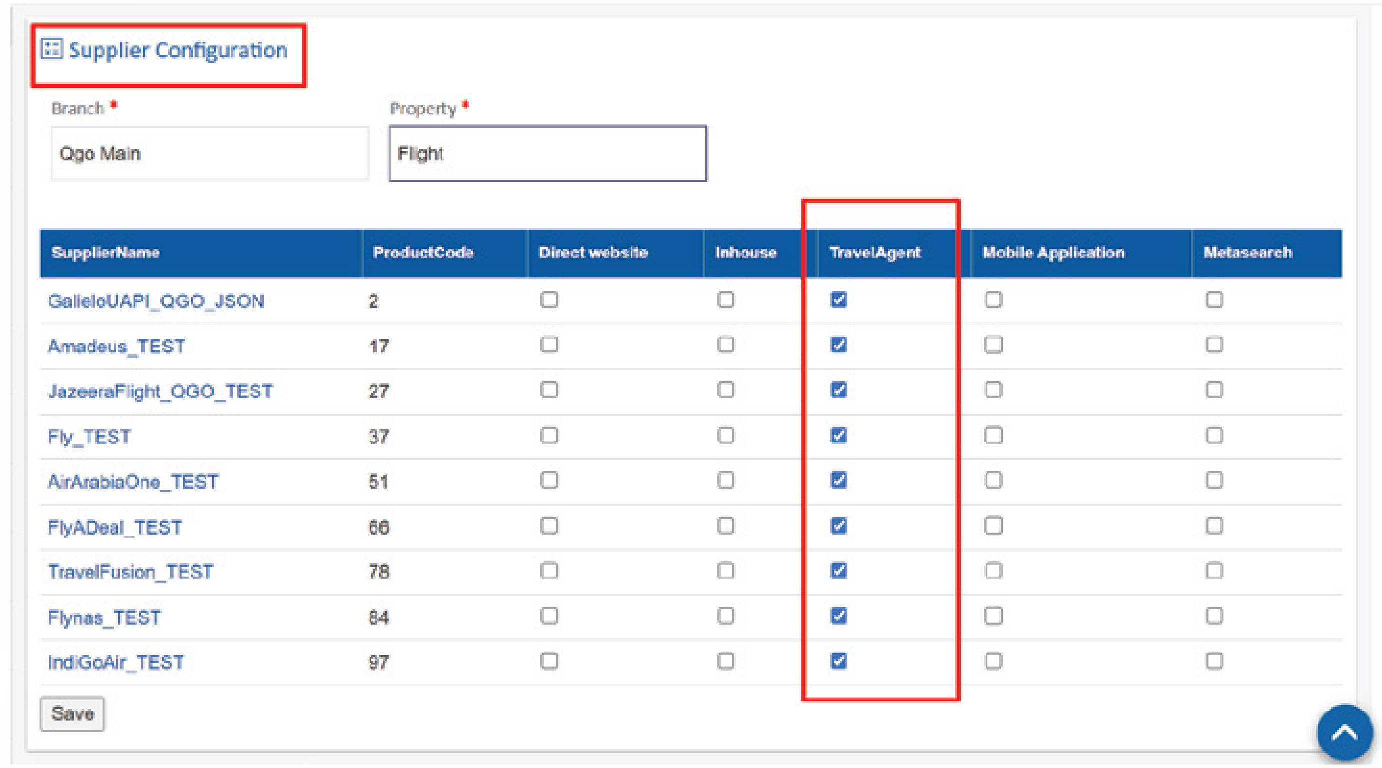


API MANAGEMENT CONFIGURATION



The API Management Set Credentials form, which is used to configure the API access keys for different organizational branches after they have been created. This process is crucial for associating API usage with branch.Choose the main branch from dropdown and map each main branch to the respective APIs.The right arrow ( ) is used to assign/map the selected main branch.The left arrow ( ) is used to remove/unmap the mapped main branch.

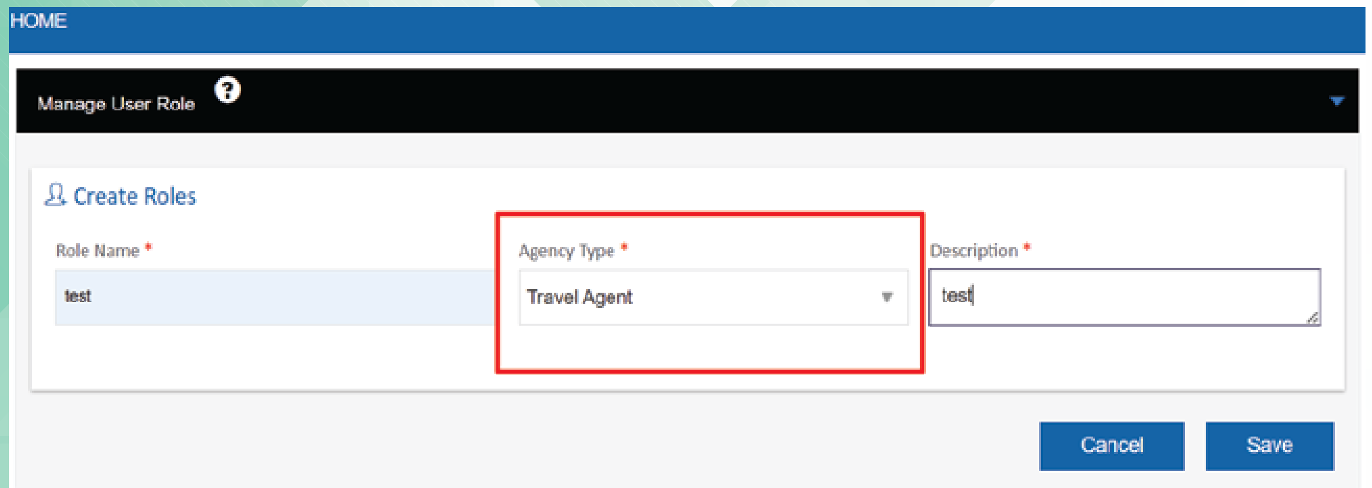
SUPPLIER CONFIGURATION



Enabling the supplier in the **Supplier Configuration** is the crucial step after setting up the API credentials, then only it activates the provider

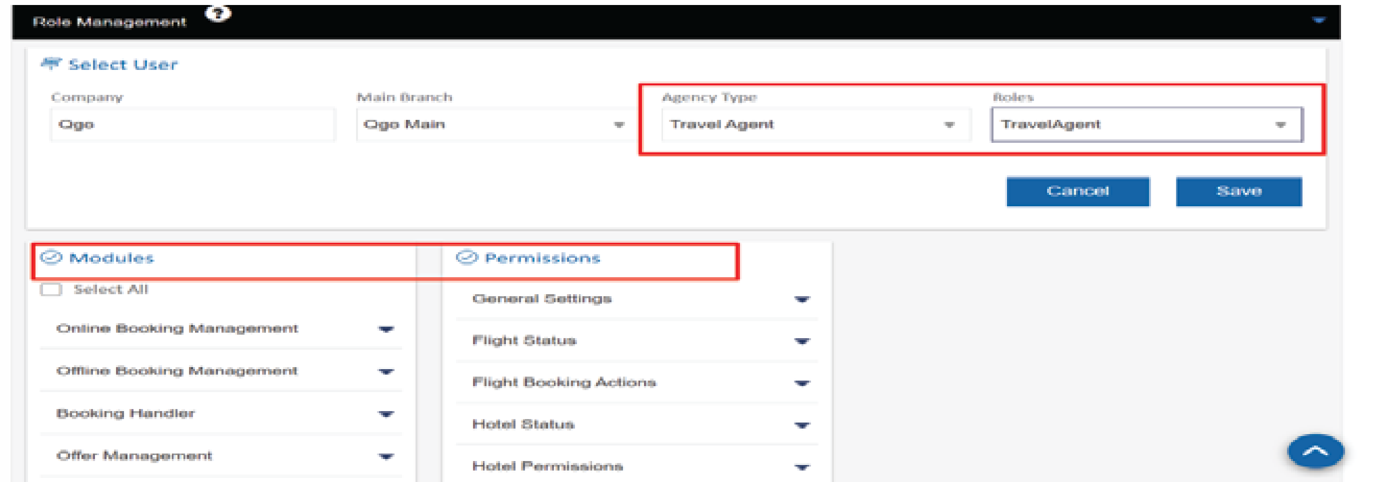
NOTE : *Following the creation of the branch unit and main branches, a transition to the corporate admin branch is required to proceed with further onboarding process.*

AGENCY TYPE – TRAVEL AGENT ROLE



Creating a role involves assigning a name, specifying its operational type (Agency Type), and providing a description. Roles are crucial for managing permissions and access levels across the Corporate Booking Tool (CBT) .

MANAGE ROLE



After defining the "TravelAgent" role, the next crucial step is assigning the specific **Modules** and **Permissions** to ensure the Travel Agent can execute their duties.

Role Permissions Configuration for Travel Agent

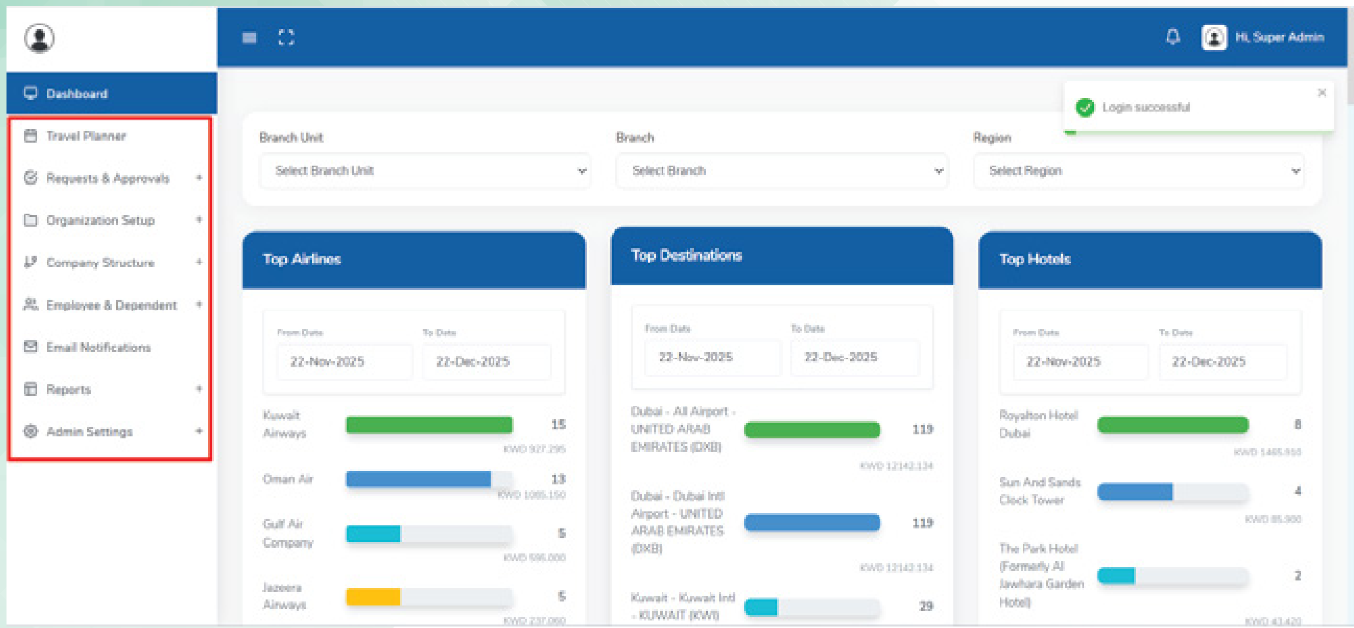
This form manages the specific access rights for a user assigned the TravelAgent role, determining exactly what they can view and execute within the system.Without granting these permissions, the role will not function correctly.

CORPORATE ADMIN GUIDE

Corporate Admin Dashboard Navigation Contents

The following items are accessible after logging into the Corporate Admin system:

> Dashboard
> Requests & Approvals
> Organization Setup
> Company Structure
> Employee & Dependent
> Admin Setting



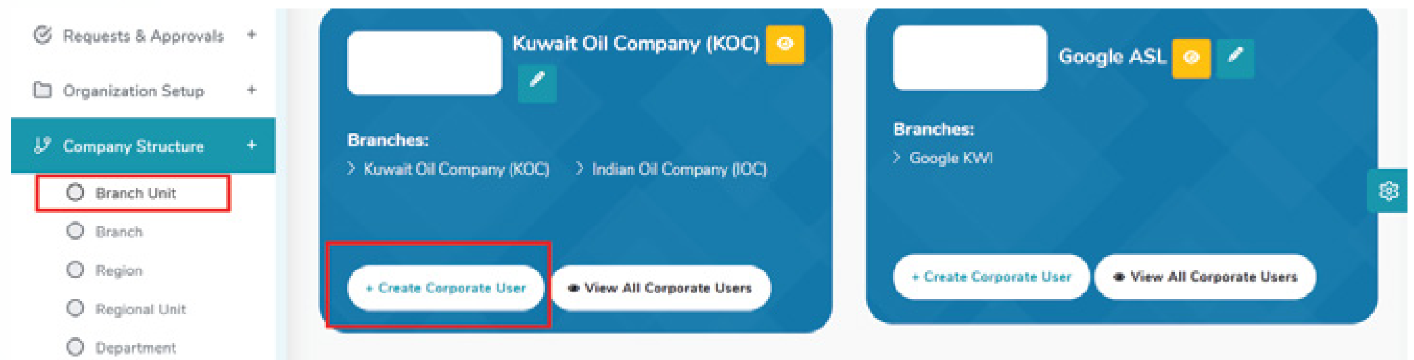
Company Structure

The Company Structure section defines the organizational hierarchy of the company within the system. It breaks down the organization into five key levels:

> Branch Unit
> Branch
> Region
> Region User
> Regional Unit
> Department

Branch Unit

> It allows the admin to **view all onboarded branch units**
> **Corporate users must be created and mapped directly against the specific Branch Unit** they belong to.



Corporate User form

Create and assign a new Corporate User within the admin panel. This process ensures the new user is correctly linked to their Branch Unit and assigned the appropriate access role.

Credentials and Profile Setup

Profile Information

Complete the mandatory fields in the Profile section to establish the user's personal and contact information.

Field	Description
Title	Select the appropriate honorific (e.g., Mr., Ms.).
First Name / Last Name	Enter the user's full name.
Phone Code / Phone Numbe	Enter the full contact phone number, including the country code.
Email	Enter the user's corporate email address. This is a critical contact point for the system.

Credentials

Define the secure login information the user will use to access the platform.

Field	Description
Username	Enter the unique login identifier for the user (often the corporate email address).
Password / Confirm Password	Set and confirm a secure password for the new user's initial login.

Branch Unit

Field	Description
Branch Unit	Select the specific operational group (Branch Unit) to which the new user belongs (e.g., Kuwait Oil Company (KOC)). This assignment determines the user's scope of work and data visibility.

Role

Field	Description
Role	Select the primary access role for the user. By default, this is the **Corporate User** role, which defines their general access level and permissions within the system.

Profile Picture

This section is for uploading an image associated with the user's profile within the system.

Field	Description
Choose File	Allows the administrator to select and upload a profile image (photo) for the new user. This field is typically **optional** but recommended for personalized user experience.

Status

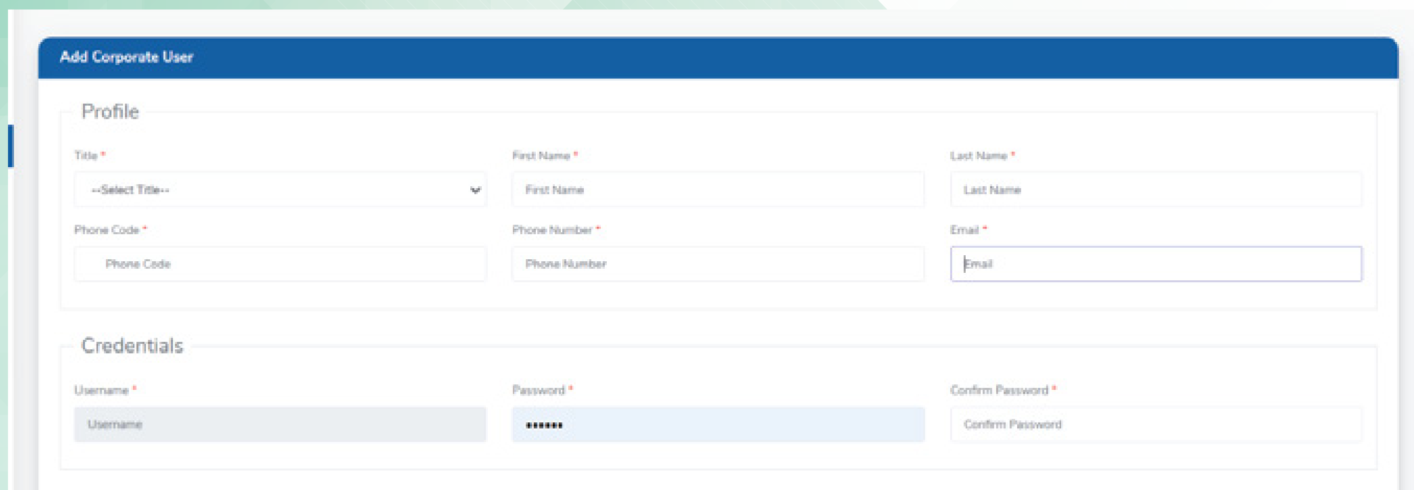
This section defines the initial operational status of the user account upon creation.

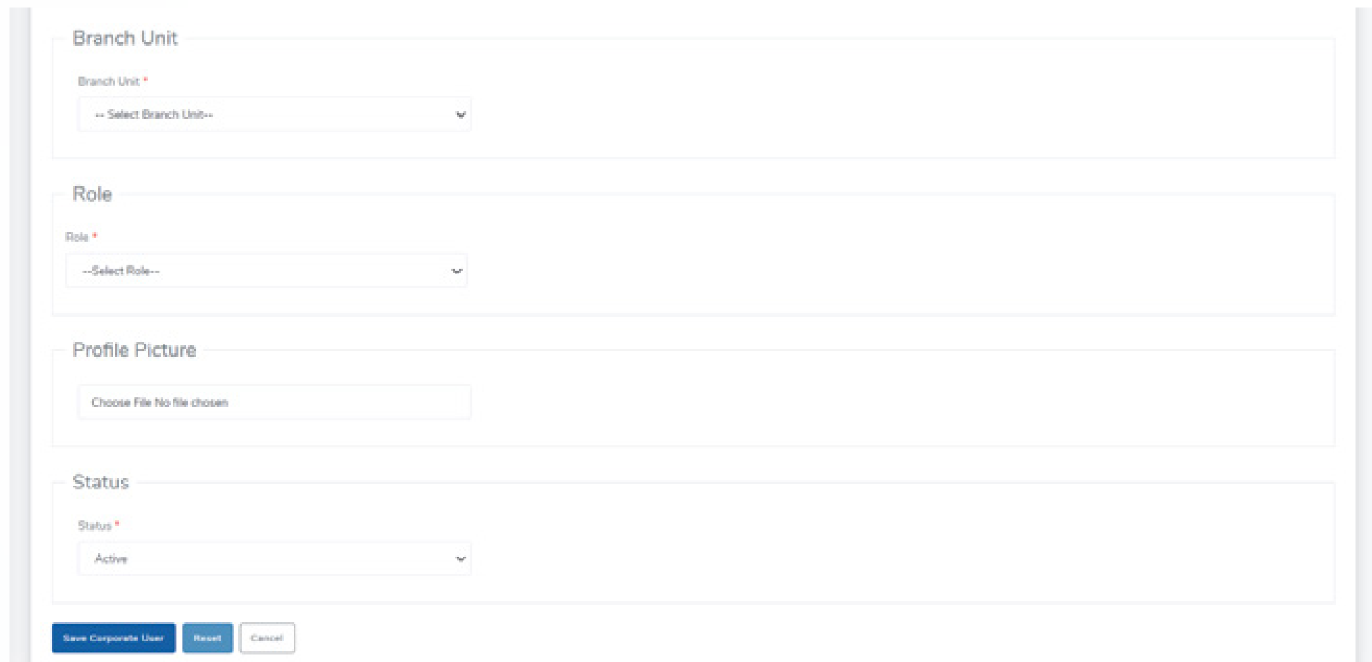
Field	Description
Status	Sets the current accessibility of the user account. The default and standard setting is **Active**, meaning the user can immediately log in and access the system upon completion.

Action Buttons

Once all necessary fields are complete, the following actions can be taken:

Button	Function
Save Branch User	Submits all entered data and finalizes the creation of the new user account, making it immediately available for login (if Status is Active).
Reset	Clears all data entered in the form fields, allowing the administrator to start the process over.
Cancel	Exits the user creation form without saving any changes.





Branch

Function: It is used to **view all established branches**
Region Creation in Branch Form

Automatic Creation Option

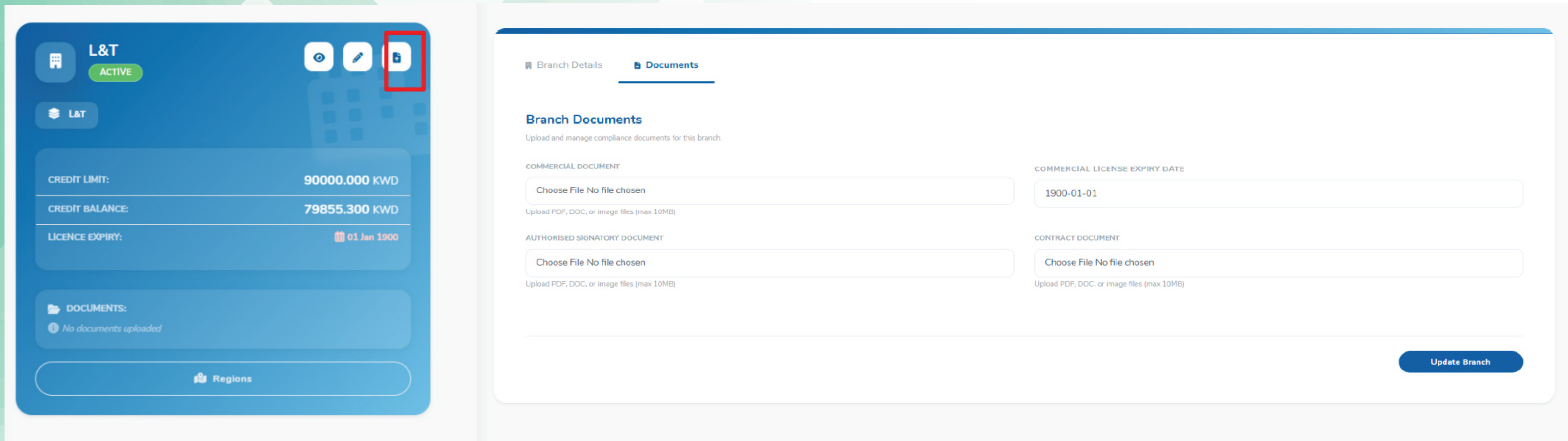
Upon clicking the **Create Region** button, a prompt will display: *"Do you want to create Region and Regional Unit automatically?"*

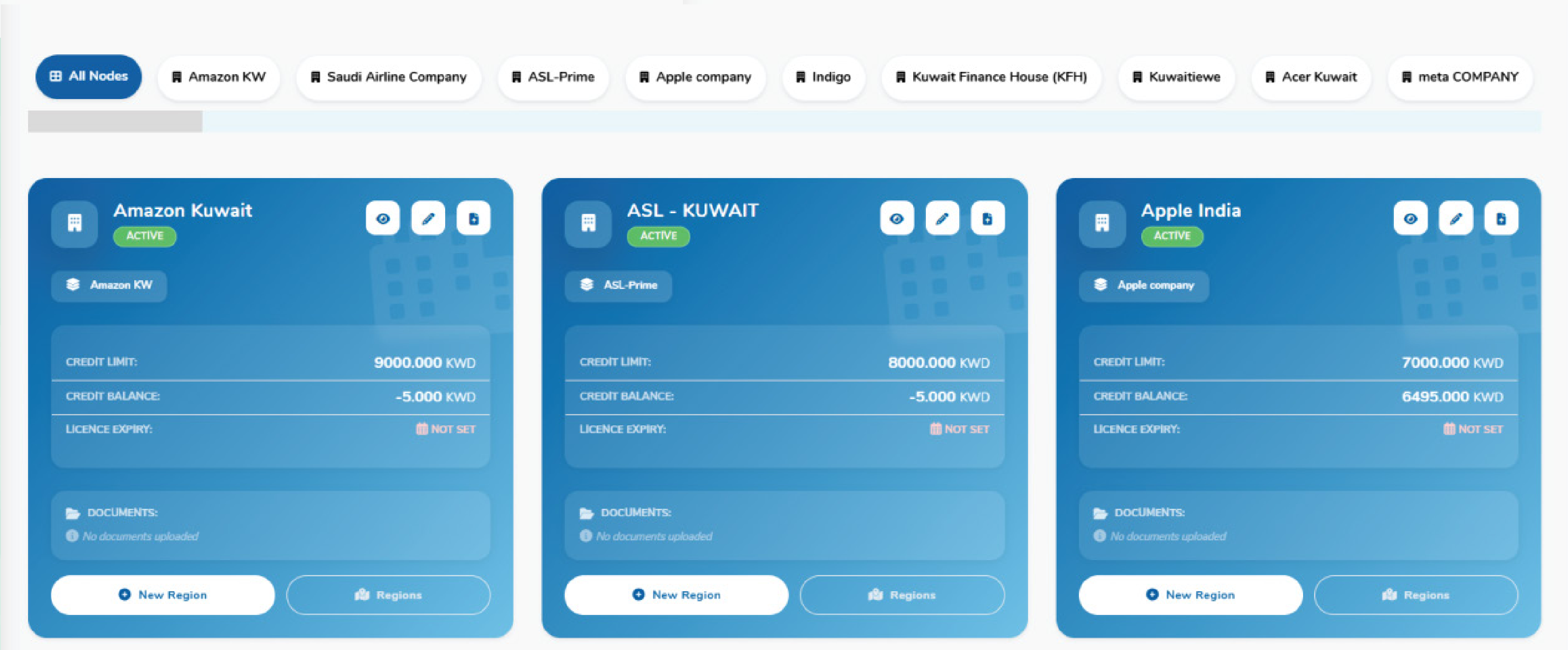
Option	Action	Outcome
YES	Select **YES** to automatically generate the Region and Regional Unit structures.	The new **Region** and **Regional Unit** are created instantly. The system will automatically assign the credit balance to these new units, inheriting the limits set for the main **Branch** to ensure immediate operability.

Manual Creation Option

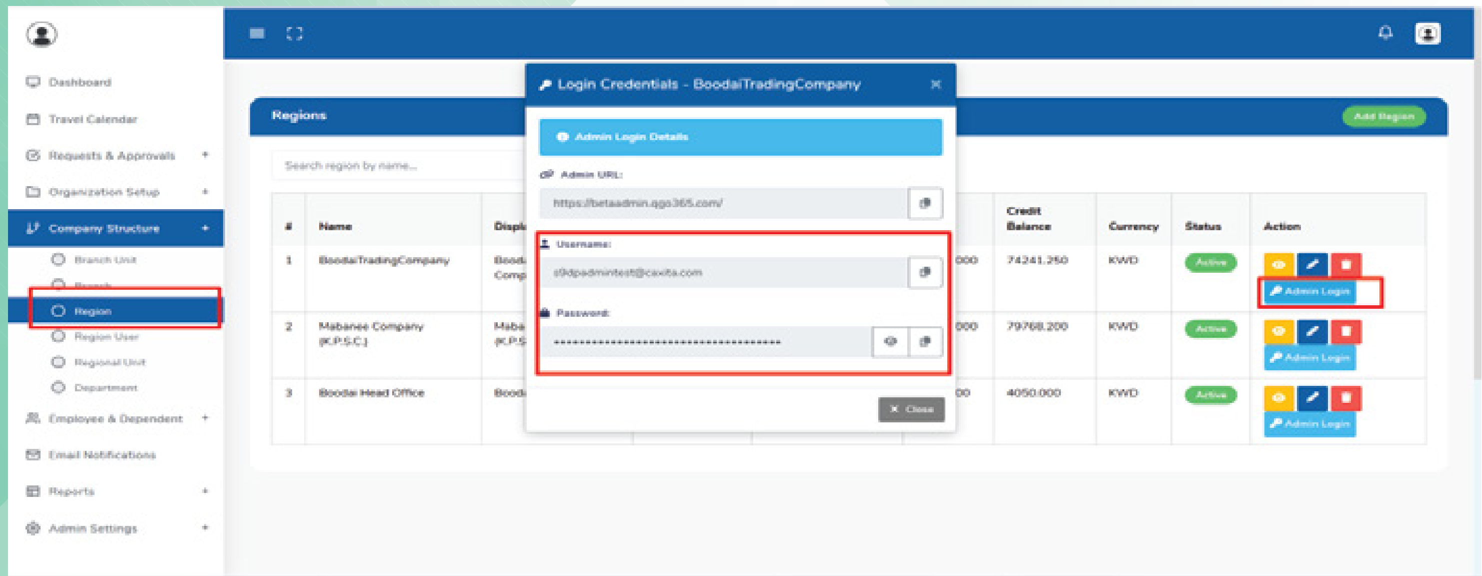
Option	Action	Outcome
NO	Select **NO** to proceed with a manual setup.	The creation process becomes **manual**. The corporate user must individually enter all required **Region** and **Regional Unit** details. Setting a specific **credit limit** for these manually created units is **optional**.

Document upload



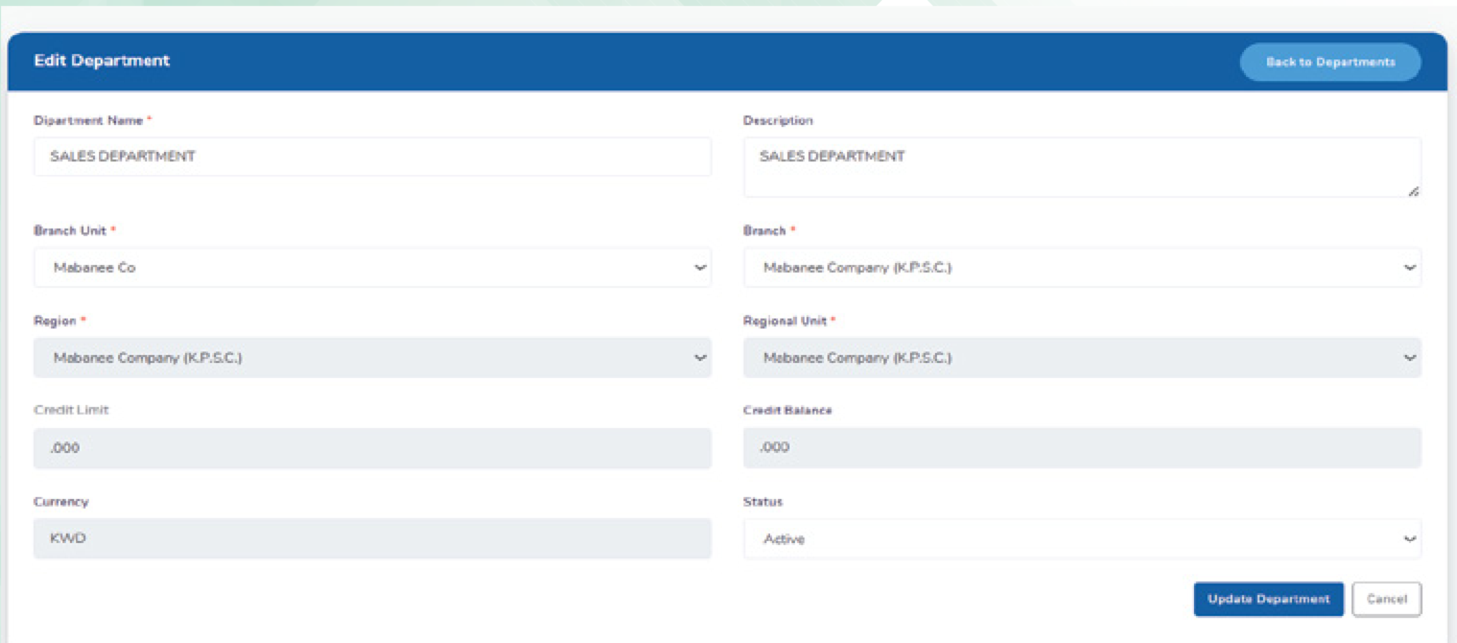


Region User



DEPARTMENT

This form is used to establish a new Department within the organization's structure. Crucially, the Department must be linked to the relevant existing organizational entities, ensuring it is positioned correctly in the company hierarchy.



Department Details

These fields define the identity and basic information for the new department.

Field	Description	Requirement
Name	The formal, unique name of the Department.	Mandatory
Display Name	A shortened or client-facing name for the Department, used in reports and headers.	Mandatory
Description	A brief explanation of the Department's function or purpose.	Optional

Organizational Mapping

This section is essential for linking the new Department to the established company structure, ensuring it is created against the Regional Unit.

Field	Description	Requirement
Branch Unit	Select the **Branch Unit** that oversees this Department.	Mandatory
Branch	Select the primary **Branch** under which this Department falls.	Mandatory
Region	Select the **Region** where this Department is geographically or functionally located.	Mandatory
Regional Unit	Select the specific **Regional Unit** that this Department is created against.	Mandatory

Financial and Status Details

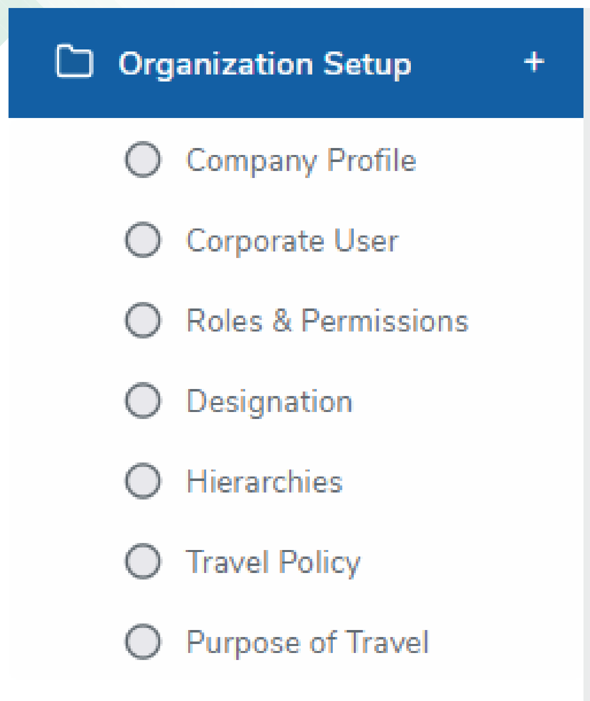
These fields finalize the operational and financial settings for the Department.

Field	Description	Requirement
Credit Limit	Enter the maximum financial allowance or budget for the Department's operations.	Optional
Status	Sets the initial operational status. Typically set to Active to allow immediate use and allocation of users.	Mandatory

ORGANIZATION SETUP

The next process is **Organization Setup**. This section is a central hub for defining the foundational administrative rules and user entitlements for the entire system.

> Corporate Profile
> Corporate User
> Roles & Permissions
> Designation
> Hierarchies
> Travel Policy
> Purpose of Travel



Starting with Designation creation in the Organization Setup section

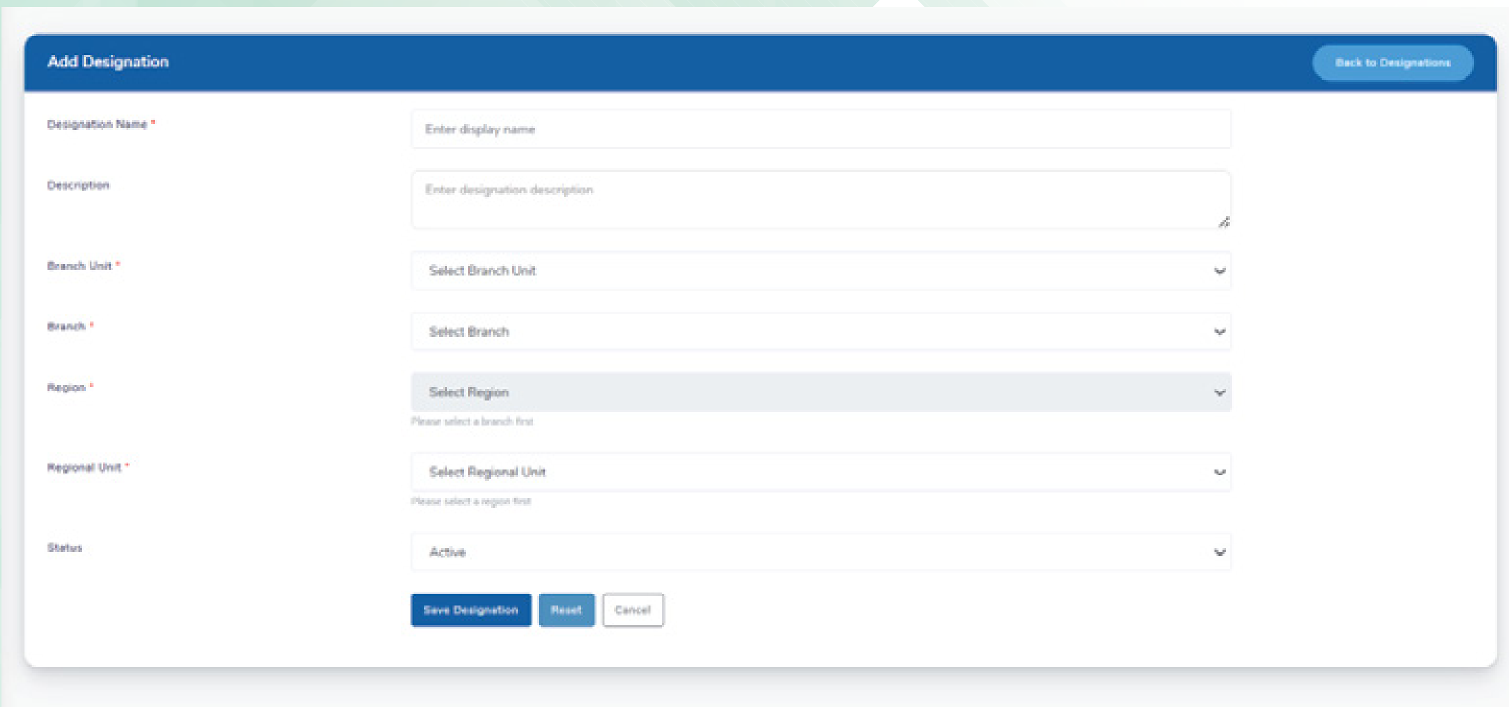
DESIGNATION CREATION FORM

This form is used to define and set up the job titles (Designations) within the system. These designations will be assigned to Corporate Users to accurately reflect their role and position in the company hierarchy.

Designation Details

The following fields establish the identity and operational status of the new designation.

Field	Description	Requirement
Name	The official, formal job title or name of the designation (e.g., Senior Manager).	Mandatory
Description	A brief explanation of the responsibilities or purpose of this designation.	Optional
Status	Sets the operational status. Set to Active to make the designation immediately assignable to users.	Mandatory (Selection)



The next step is creating the Hierarchy flow, which is crucial for establishing the approval structure within the system.

HIERARCHY FLOW CREATION

This form is used to define the **Approval Workflow Hierarchy** for a specific department. The hierarchy determines the reporting structure and the order in which requests must be approved.

Hierarchy Details

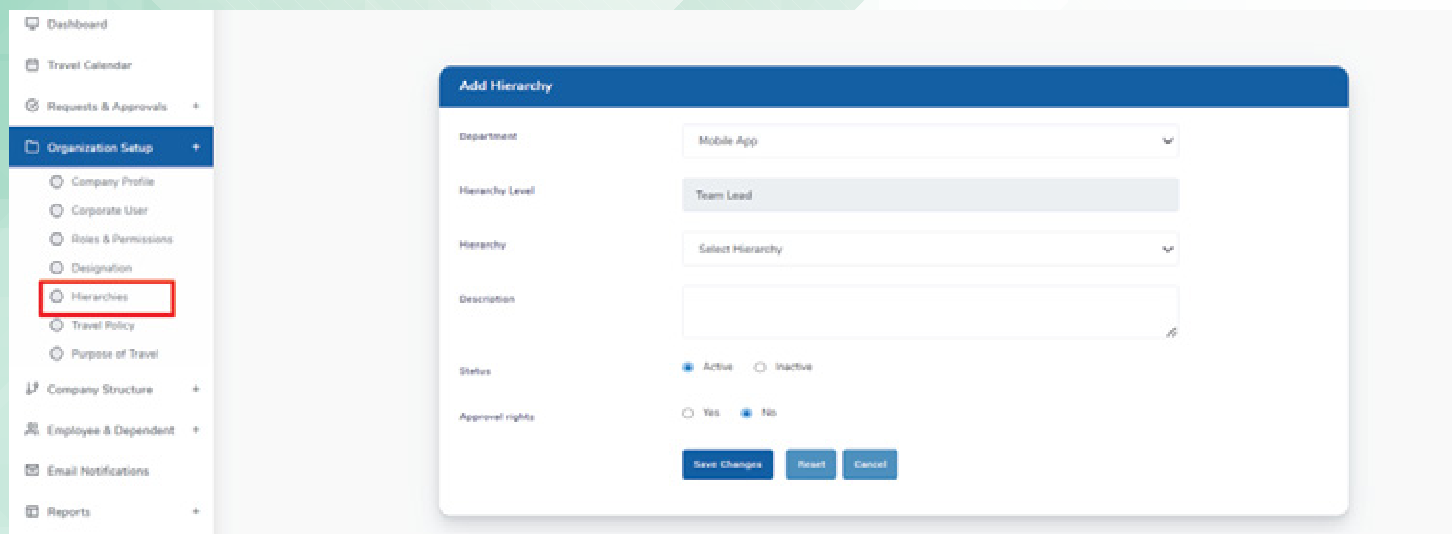
The hierarchy flow is **created against each Department** to ensure that approval steps are specific to that group's operational needs. The flow is built based on **Designations** (job titles).

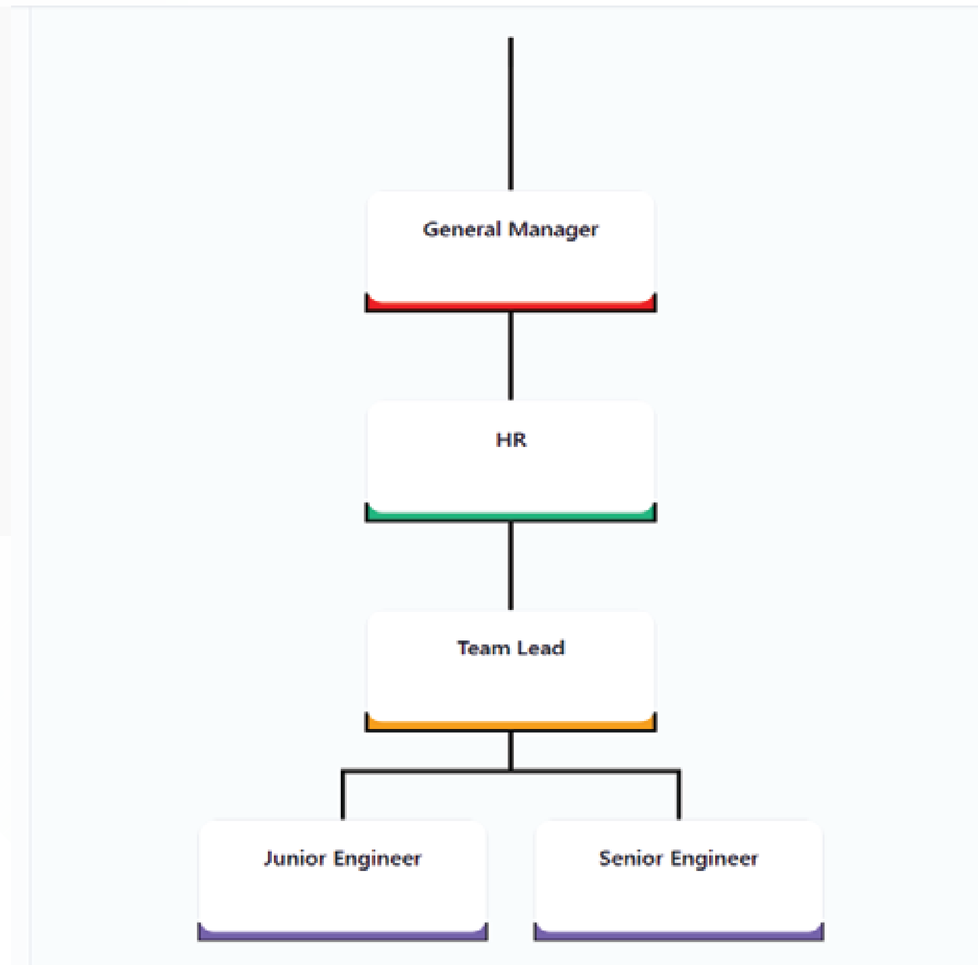
Field	Description	Purpose
Department	Select the specific Department (e.g., **Operations**) for which this approval hierarchy will apply.	Mandatory
Hierarchy Level	This field defines the specific **level** or step within the hierarchy (e.g., **Team Lead Operations**). This level is typically based on a defined **Designation**.	Mandatory
Hierarchy	Select the **next reporting level** or individual in the approval chain to whom the current level reports.	Mandatory
Description	A brief explanation of the approval flow for this level.	Optional

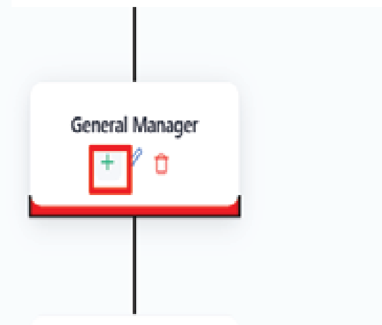
Status and Approval Rights

These fields finalize the operational status and function of this specific hierarchy level.

Field	Description
Status	Sets the operational state of this level in the flow. Select Active to enable it for use in approval workflows.
Approval rights	Determines if the user at this hierarchy level has the authority to approve requests: **Yes** grants approval power, while **No** means they are only a reviewer or reporting level.

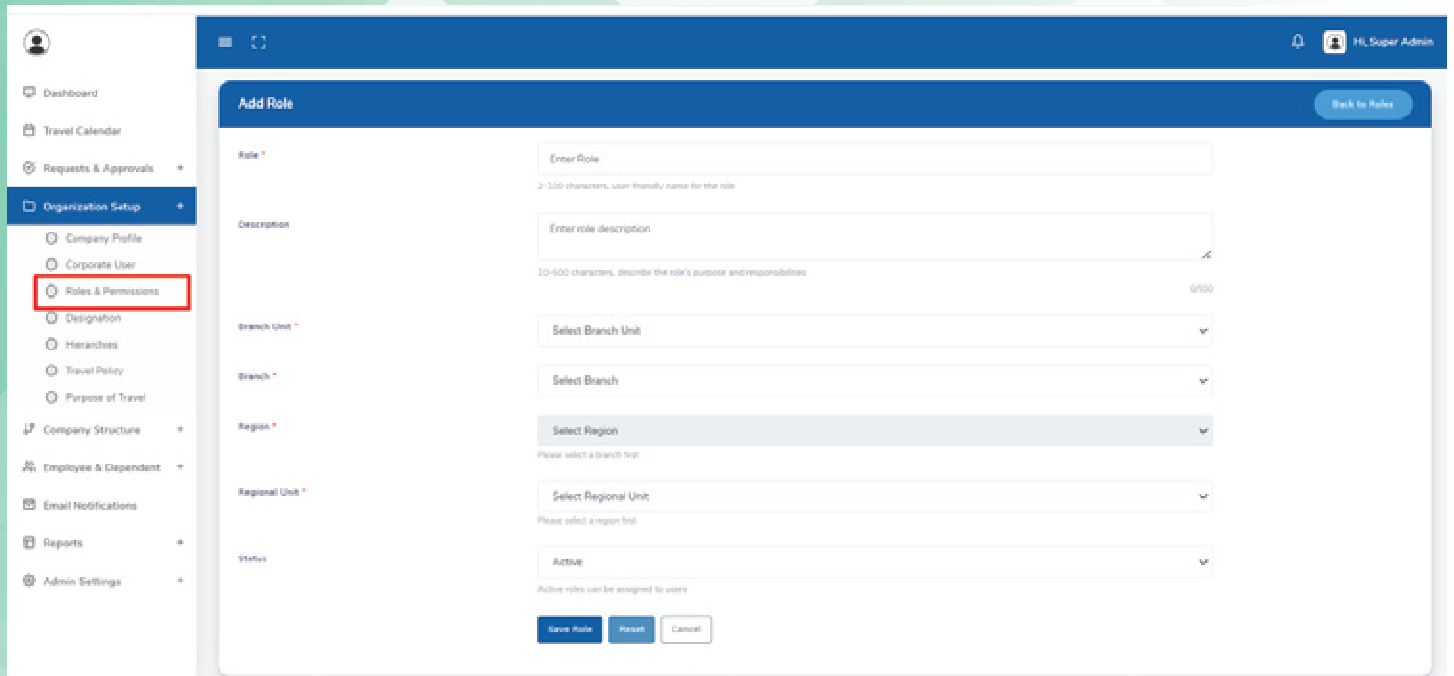




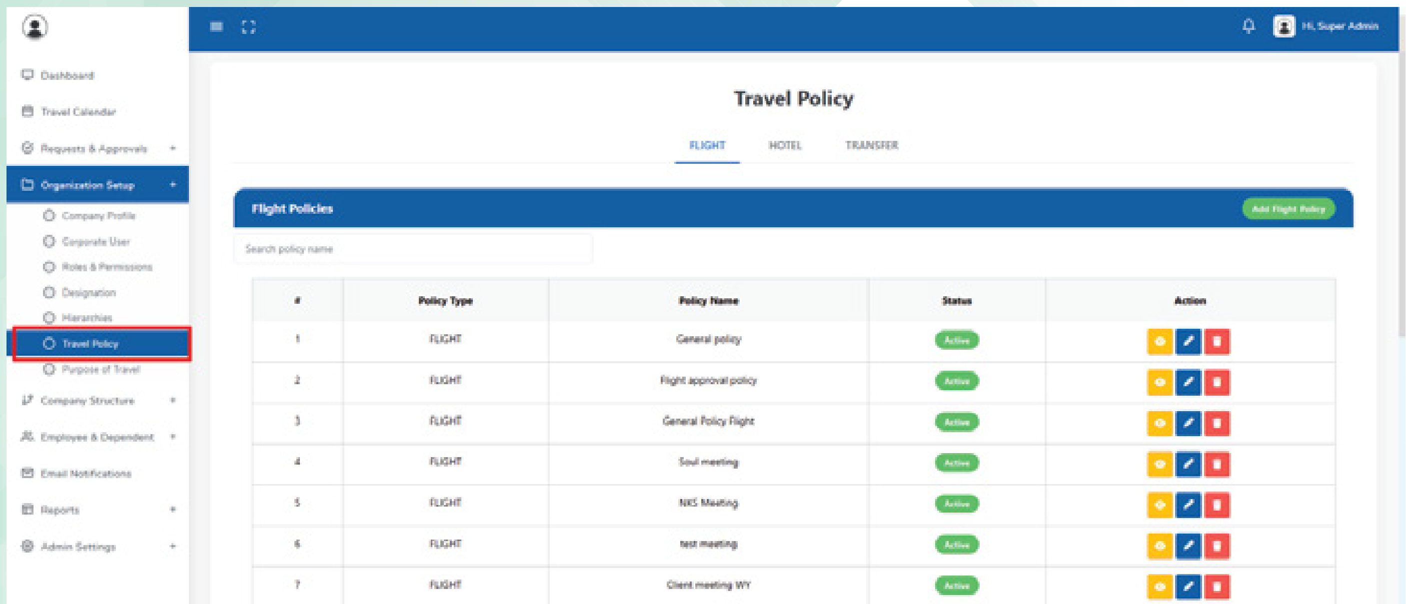


ROLES AND PERMISSION

Role creation and assigning permissions against the role.



ROLES AND PERMISSION



Travel Policy Management

This page allows the Admin to define, manage, and assign various travel policies (Flight, Hotel, and Transfer) to different users or groups within the organization. These policies enforce corporate spending limits, class of travel restrictions, and other compliance rules directly within the booking tool.

Creating a New Travel Policy

This form is where you define the specific rules and restrictions for employee travel. Parameters on the left can be drag and drop selecting a Policy Type, can create a highly customized policy that automatically guides employees toward compliant bookings.

Select the Policy Type

First, determine the scope of this policy by selecting one of the radio buttons:

- **General Policy**: This is the default policy that applies to **all employees** unless a more specific policy (Role Based or Department Based) overrides it. Use this for company-wide standards.
- **Role Based Policy**: Select this if the policy will apply only to employees with a specific **Designation or Role** (e.g., only "Executives" are allowed Business Class).
- **Department Based Policy**: Select this if the policy will apply only to employees belonging to a specific **Department** (e.g., the "Sales" team has a different lodging budget than the "IT" team).

Define the Policy Criteria (The Rules)

Use the buttons on the left (highlighted in red) to define the specific rules and restrictions this policy will enforce. Drag and drop these buttons will open configuration fields where you can add, remove, or restrict options:

Complete Flight Policy Parameter Definitions

This table defines all available criteria for setting rules within a corporate travel policy for flight bookings.

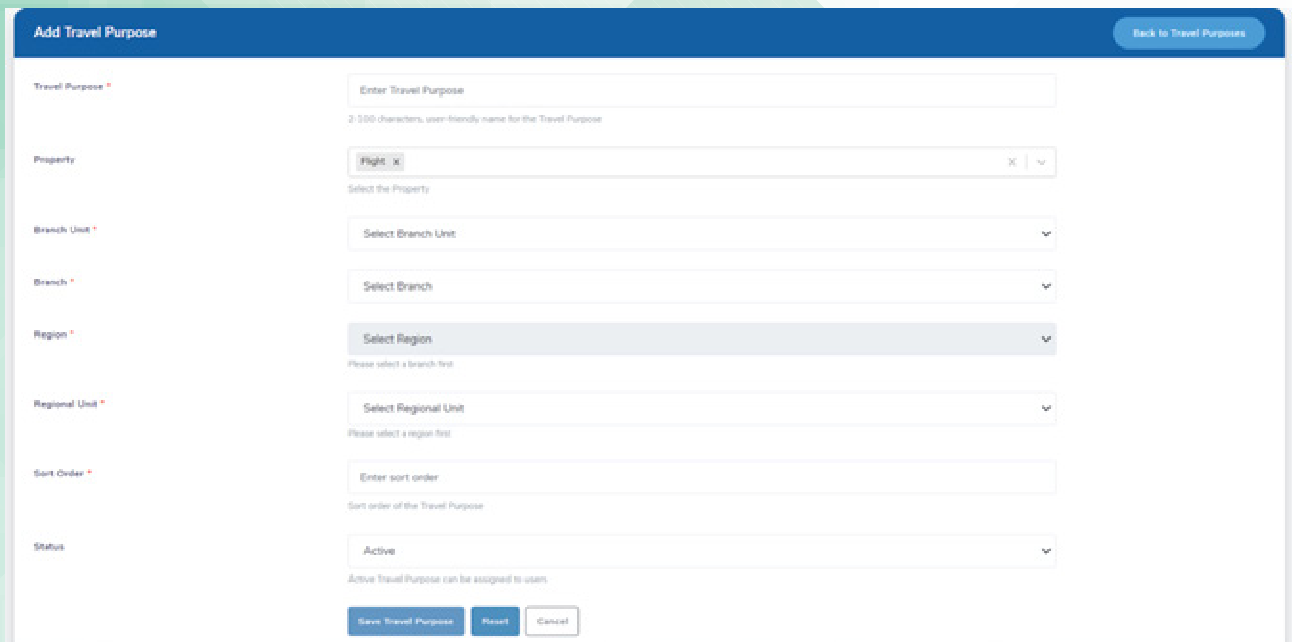
Parameter	Purpose & Content	Example Policy Application
Route	Geographical restrictions based on origin, destination, or connections.	Prevent booking a flight from restricted routes
Haul Type	Define rules based on the duration of the journey	If any segment duration exceeds the configured haul type (e.g., > 6 hours): system allows user to upgrade to higher class.
Cabin Class	Set the maximum allowed class of service for travelers under this policy. Options include Economy, Premium Economy, Business, or First Class.	Only Executives are permitted to book Business Class for international travel.
Travel Purpose	Tie the policy to the Reason for Travel selected by the employee during the booking request.	Apply stricter cost limits for 'Training' trips than for 'Client Visit' trips.
Carrier Type	Restrict or mandate the use of specific airlines based on their service category (e.g., Full-Service vs. Low-Cost).	Restrict the use of Low-Cost Carriers to ensure a consistent travel experience for employees.
Flight Arrival Preference	Define preferred or restricted arrival times for the traveler.	Restrict booking flights that arrive between 1:00 AM and 5:00 AM to avoid impacting the traveler's first day of business.
Preferred Airlines	Designate specific airlines that employees must prioritize, typically based on corporate negotiated rates or loyalty programs.	Mandate booking with the company's preferred vendor.
Restricted Airlines	**Explicitly block certain airlines** from being booked due to safety ratings, poor service history, or other corporate decisions.	Block all bookings on Airline X due to recent service complaints.
Group Or Individual	Set rules differently depending on whether the booking is for a single person or a larger group traveling together.	Allow for a higher ticket price threshold when the booking is for a Group of 5 or more travelers.

Complete Policy Details

Fill in the required information to activate and manage the policy:

› **Purpose of Travel:** (If applicable) Select the specific travel purpose this policy is tied to or can choose multi purpose of travel
› **Policy Name:** A clear, concise name (e.g., 'Managers - Domestic Economy Policy').
› **Description:** A brief summary of what the policy covers (e.g., 'Applies to all managers for domestic travel only. Restricts flights to 4-star hotels.').
› **Effective From/To Date:** Define the period during which this policy will be active and enforced.
› **Active Toggle:** Ensure the 'Active' switch in the top-right corner is ON to apply the policy immediately after saving.

TRAVEL PURPOSE FORM



This form is used by the Admin to define and manage the standardized list of reasons for employee travel. These defined purposes are then linked to specific **Travel Policies.**

Name: Enter a user-friendly name for the travel purpose (e.g., Client Meeting, Annual Conference, Internal Audit). This is the name employees will see in the booking tool.

Property: Multi-select dropdown allowing selection of applicable modules (Flight, Hotel, Transfer).

> Branch Unit – Dropdown to select the relevant branch unit.
> Branch – Dropdown to select the applicable branch.
> Region – Dropdown to select the associated region.
> Regional Unit – Dropdown to select the regional unit.

Sort Order

Enter a **numerical value** to determine where this purpose appears in the dropdown list.

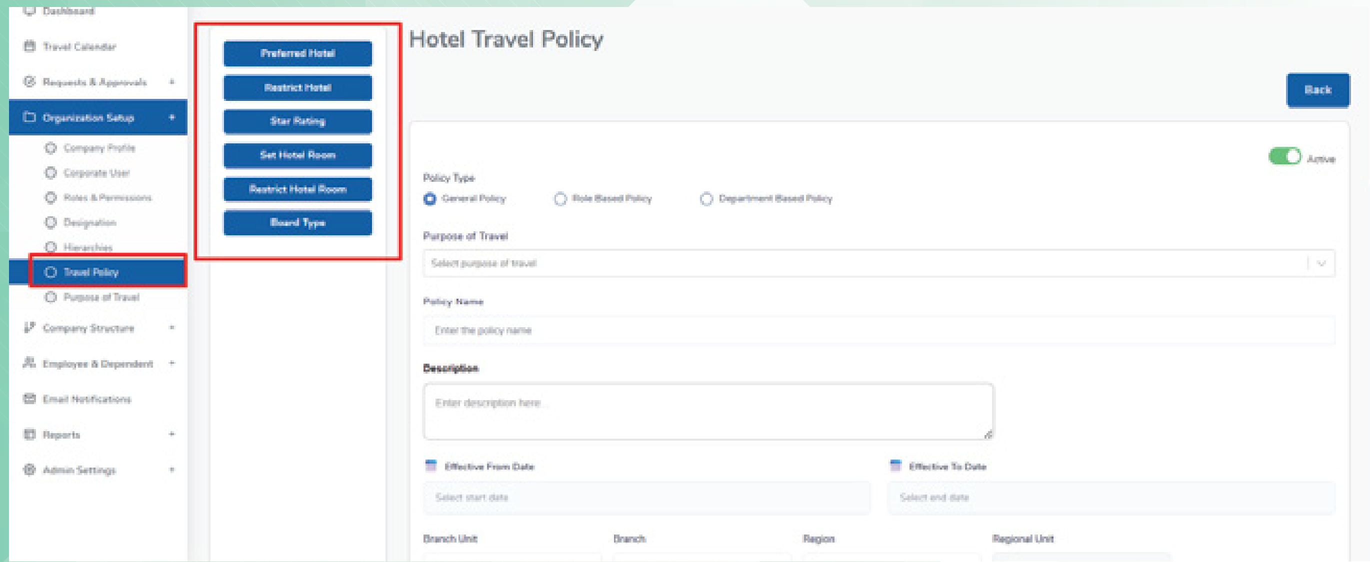
Status

Select the status. Choose **Active** to make this travel purpose immediately available for use in employee travel requests.

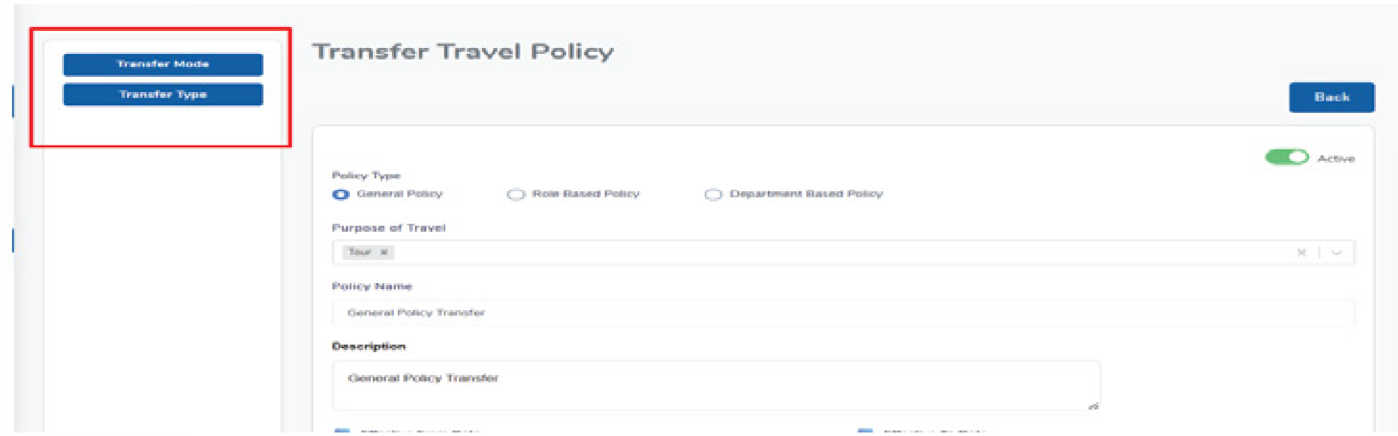
Click **Save Travel Purpose** to add the new entry to the system.

Hotel Policy Parameter

Parameter	Purpose & Content	Example Policy Application
Preferred Hotel	Designate specific hotels or hotel chains that employees must prioritize due to corporate agreements or cost efficiency.	Mandate that employees book a room at the 'Global Stay' chain if available, to maximize corporate discounts and rewards.
Restrict Hotel	Explicitly block certain hotels or hotel chains from being booked, often due to high cost, poor location, or lack of corporate services.	Block all luxury hotels with a nightly rate exceeding the maximum price limit of the policy.
Star Rating	Set the minimum and/or maximum star rating for hotels that employees are allowed to book.	Require all hotel bookings to have a minimum rating of 3 Stars and a maximum rating of 4 Stars.
Set Hotel Room	Define the specific room type (e.g. standard, executive, suite) that employees are allowed or restricted from booking.	Set the default booking to a Standard Room only, regardless of the traveler's designation.
Restrict Hotel Room	Explicitly block certain, usually premium, room types (e.g., suites, rooms with special views) from being selected.	Restrict the booking of Executive Suites for all staff below the Vice President level.
Board Type	Specify the meal plan or board basis that is allowed or required for the booking (e.g., Room Only, Bed and Breakfast, Half Board).	Mandate that the booking is for Bed and Breakfast (B&B) to ensure the traveler has a meal before starting their day.



Transfer Policy Parameter



Parameter	Purpose & Content	Example Policy Application
Transfer Mode	Define the type of vehicle that is allowed (e.g.,standard, premium).	mandate the booking of **Standard** for all staff below the Director level
Transfer Type	Define the **range of the transfer** (e.g., shared,private)	Can be shared or private.

Employee & Dependent

> Manage Employee

> Manage Dependent

This process, accessed via Manage Employee, is for onboarding new corporate employees. It is crucial to follow the highest authorized person first principle, meaning Reporting Managers and high-level Designations/Roles must be created before their subordinates to ensure the approval and reporting hierarchies are correctly established.

Employee & Dependent: Corporate Employee Onboarding

The Employee Onboarding form integrates new users into the system, mapping them to the organization's structure and defining their access and financial settings.

Profile Information

This section captures the mandatory personal and official contact details for the employee.

Field	Description	Requirement
Employee No	The unique company identifier for the employee.	Mandatory
Title, First Name, Last Name	The employee's full name.	Mandatory
Official Phone Code / Number / Email	The employee's official work contact details.	Mandatory
Personal Phone Code / Number / Email	The employee's personal contact details.	Non-Mandatory
Nationality	The employee's nationality.	Mandatory
Address	The employee's physical address.	Non-Mandatory

Credentials

This section defines the user's login access.

Field	Description	Requirement
Username	The unique identifier for login (e.g., qgorequest@qgo365.com).	Automatic generation of above above given givem email id- Mandatory
Password / Confirm Password	Set and confirm the initial secure password.	Mandatory

Role & Reporting (Critical Section)

This is the most critical section as it links the employee to the pre-configured organization structure and reporting flow.

Field	Description	Dependency Notes
Branch Unit, Branch, Region, Regional Unit	Defines the employee's location and organizational mapping.	Selection cascade: **Branch** selection is needed before **Region**, and so on.
Department	Select the specific **Department** the employee belongs to.	Mandatory
Designation	Select the employee's job title (from **Organization Setup**).	Mandatory
Role	Select the employee's system access role (e.g., Corporate User, Approver).	Mandatory
Reporting Manager	Select the employee's direct manager from the list of existing, onboarded employees.	HIGH PRIORITY: The manager must be onboarded **first** to appear in this list.

Document Details

This section captures mandatory travel and identification documents.

Field	Description	Requirement
Passport Number	The unique passport number.	Mandatory
Passport Expiry Date	The date of the passport expires.	Mandatory
Passport Issued Country	The country that issued the passport	Mandatory

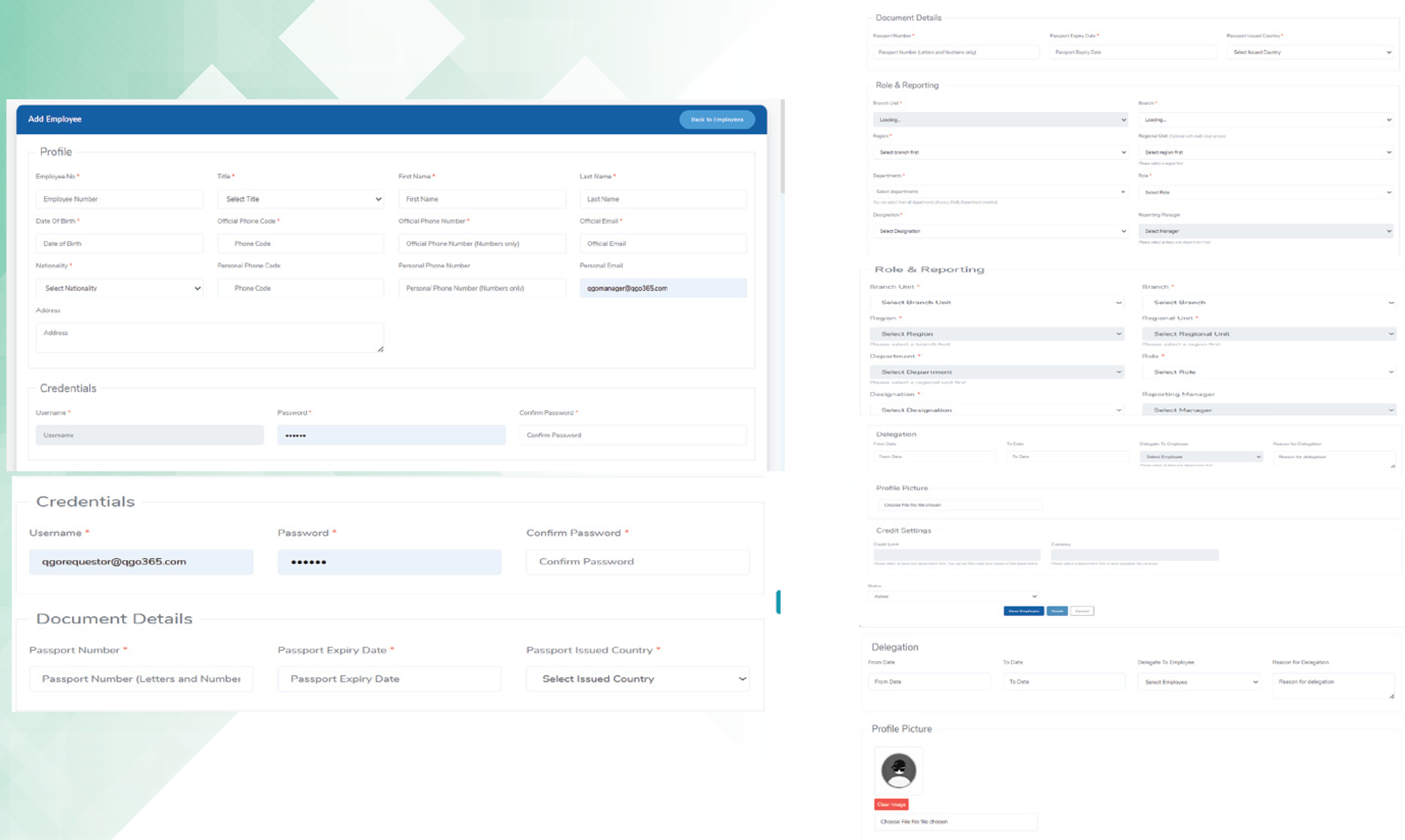
Credit Settings and Status

Field	Description
Profile Picture	Option to upload a photo for the user's profile.
Credit Limit	The specific financial limit allocated to this employee, which auto-populates based on the selected Department's settings.
Currency	The operational currency for the employee, which auto-populates based on the Department's setup.
Status	The account's operational state. Set to Active to allow the employee to log in immediately.

Document Details

This section captures mandatory travel and identification documents.

Field	Description	Requirement
Passport Number	The unique passport number.	Mandatory
Passport Expiry Date	The date of the passport expires.	Mandatory
Passport Issued Country	The country that issued the passport	Mandatory


Add Employee
Back to Employees
Profile
Employee No *
Employee Number
Title *
Select Title
First Name *
First Name
Last Name *
Last Name
Date Of Birth *
Date of Birth
Official Phone Code *
Phone Code
Official Phone Number *
Official Phone Number (Numbers only)
Official Email *
Official Email
Nationality *
Select Nationality
Personal Phone Code
Phone Code
Personal Phone Number
Personal Phone Number (Numbers only)
Personal Email
qgomanager@qgo365.com
Address
Address
Credentials
Username *
Username
Password *
Confirm Password *
Confirm Password
Credentials
Username *
qgorequestor@qgo365.com
Password *
Confirm Password *
Confirm Password
Document Details
Passport Number *
Passport Number (Letters and Numbe
Passport Expiry Date *
Passport Expiry Date
Passport Issued Country *
Select Issued Country
Document Details
Role & Reporting
Role & Reporting
Branch Unit *
Select Branch Unit
Branch *
Select Branch
Region *
Select Region
Regional Unit *
Select Regional Unit
Department *
Select Department
Role *
Select Role
Designation *
Select Designation
Reporting Manager
Select Manager
Delegation
Profile Picture
Credit Settings
Delegation
From Date
From Date
To Date
To Date
Delegate To Employee
Select Employee
Reason for Delegation
Reason for delegation
Profile Picture
Clear Image
Choose File No file chosen

The Delegation feature allows an employee to temporarily assign their approval authority to another employee for a specified period. This ensures continuity of operations during absences such as leave, travel, or unavailability.

Fields Description

From Date

Select the start date from which the delegation will be effective.

To Date

Select the end date until which the delegation will remain active. After this date, delegation will automatically expire.

Delegate To Employee

Choose the employee to whom the responsibilities and approvals will be delegated during the selected period.

Reason for Delegation

Enter the reason for delegating responsibilities (e.g., leave, business travel, unavailability).

Functionality:

During the delegation period all approvals, and requests assigned to the delegator will be routed to the selected delegate.

Delegation is date-bound and automatically deactivates once the end date is reached.

This feature ensures uninterrupted workflow and timely approvals without manual intervention.

MANAGE DEPENDENT

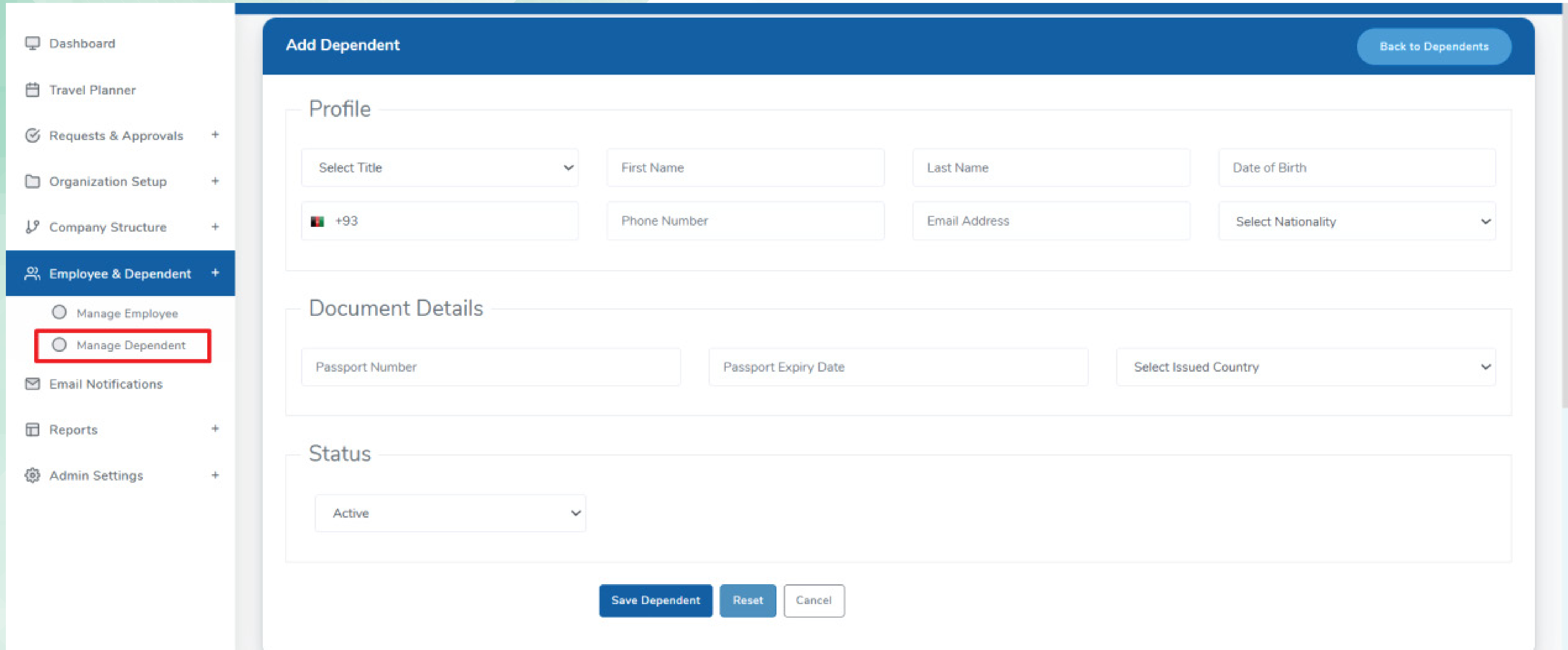
The **Manage Dependent** module allows employees or administrators to add and maintain dependent details for travel purposes.

Add Dependent:

Capture personal details such as name, date of birth, contact information, and nationality.

Enter passport details including passport number, expiry date, and issued country.

Set the dependent status as **Active** or **Inactive**.



REQUEST AND APPROVAL

This section details the process for handling all Requests & Approvals submitted by employees through the Corporate Booking Tool (CBT).

Request Initiation: The employee submits a travel request through the Corporate Booking Tool (CBT).

Request Routing: The submitted request is automatically routed to the designated Manager or Approver within the Corporate Admin Panel based on the organization's pre-defined approval structure (e.g., Level 1, Level 2).

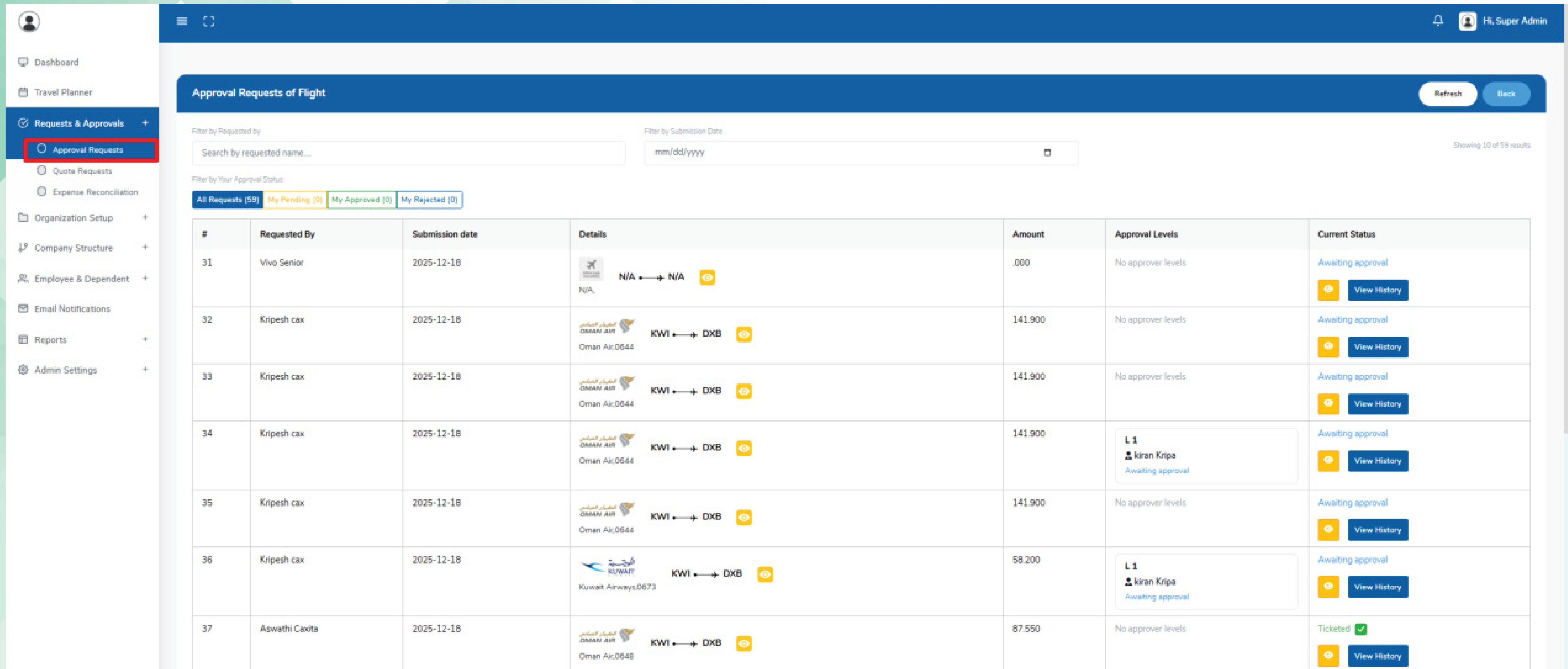
Review and Action: The designated Approver logs into the Corporate Admin Panel and navigates to the 'Approval Requests' section. Here, the approver must review the request details, and either Approve or Reject the request.

Note: *If the request requires multiple approvals (multi-level), it will proceed sequentially until all levels are approved or a rejection is issued.*

Completion of Booking:

Upon Approval: Once the request receives the final required approval, the employee must log back into the CBT to proceed with and complete the ticketing process (e.g., payment, final confirmation).

Upon Rejection: If the request is rejected at any level, the employee must submit an entirely new request.


Dashboard
Travel Planner
Requests & Approvals
Approval Requests
Quote Requests
Expense Reconciliation
Organization Setup
Company Structure
Employee & Dependent
Email Notifications
Reports
Admin Settings
Hi, Super Admin
Approval Requests of Flight
Refresh
Back
Filter by Requested by
Search by requested name...
Filter by Submission Date
mm/dd/yyyy
Showing 10 of 59 results
Filter by Your Approval Status
All Requests (59)
My Pending (0)
My Approved (0)
My Rejected (0)
| Requested By | Submission date | Details | Amount | Approval Levels | Current Status
31 | Vivo Senior | 2025-12-18 | N/A → N/A N/A, | .000 | No approver levels | Awaiting approval View History
32 | Kripesh cax | 2025-12-18 | Oman Air,0644 KWI → DXB | 141.900 | No approver levels | Awaiting approval View History
33 | Kripesh cax | 2025-12-18 | Oman Air,0644 KWI → DXB | 141.900 | No approver levels | Awaiting approval View History
34 | Kripesh cax | 2025-12-18 | Oman Air,0644 KWI → DXB | 141.900 | L 1 kiran Kripa Awaiting approval | Awaiting approval View History
35 | Kripesh cax | 2025-12-18 | Oman Air,0644 KWI → DXB | 141.900 | No approver levels | Awaiting approval View History
36 | Kripesh cax | 2025-12-18 | Kuwait Airways,0673 KWI → DXB | 58.200 | L 1 kiran Kripa Awaiting approval | Awaiting approval View History
37 | Aswathi Caxita | 2025-12-18 | Oman Air,0648 KWI → DXB | 87.550 | No approver levels | Ticketed View History

SEND QUOTE

> An employee can send one Quote Request with up to three quotations.
> Multiple quotations (maximum 3) are allowed within a single quote request.
> Once submitted, the shared quote request along with all quotations will be visible in the Quote Requests listing for review and approval.

Employee ID – Displays the employee identifier.

Requested By – Shows the requester's name/designation.

Submission Date – Date on which the quote request was submitted.

Details – Displays airline options with route details.

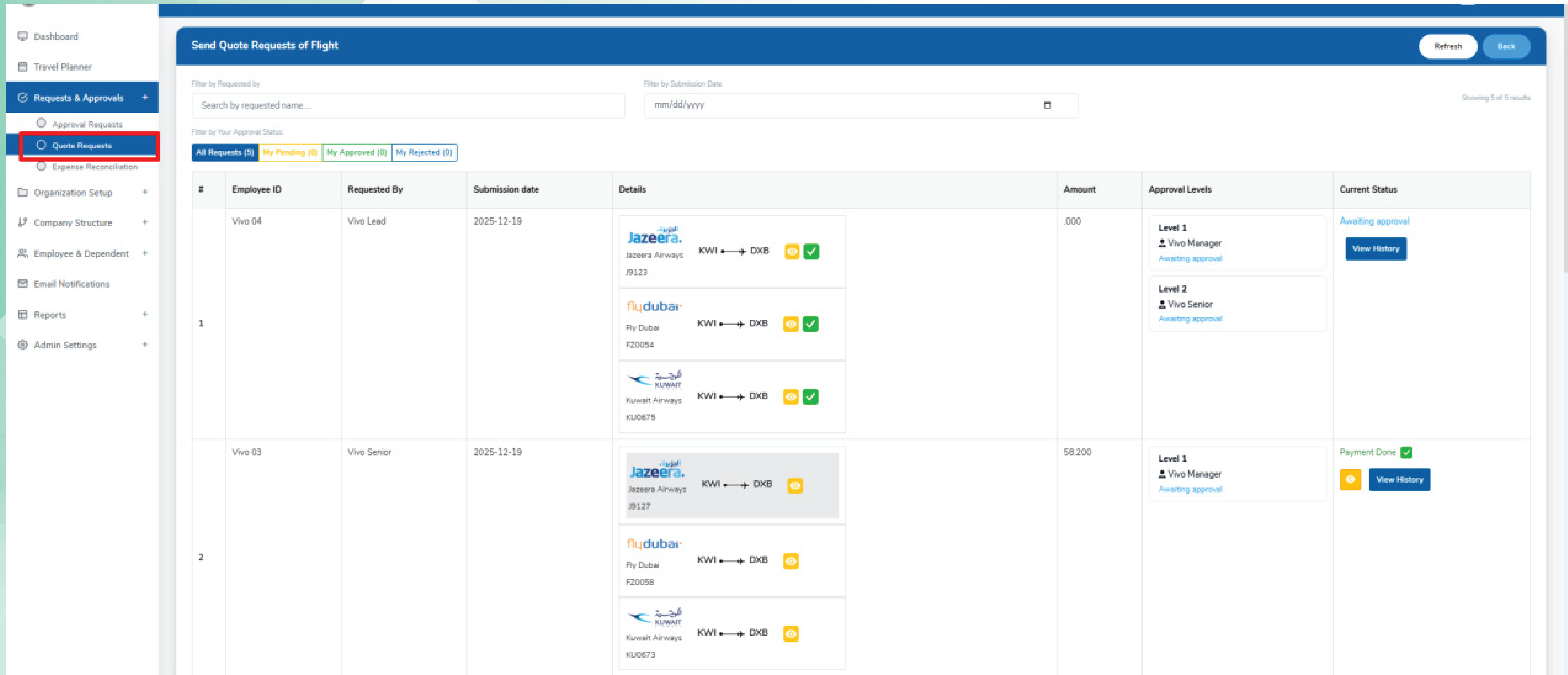
Amount – Shows the quoted amount.

Approval Levels – Displays approval hierarchy and current approval status per level.

Current Status – Shows the overall request status (e.g., Awaiting Approval, Payment Done).

View History – Button to view approval and status history.

After the quote is approved, the user should be required to **log in to the CBT web portal**. Once logged in, the user must proceed to the **Booking Form** and complete the booking **from quote request**



Travel calendar

The **Travel Calendar** provides a calendar-based view of planned and ongoing travel activities.

Details Displayed

Employee Name,Source and Destination,Purpose of Travel

Each travel request is shown on the respective travel dates for easy tracking and visibility.

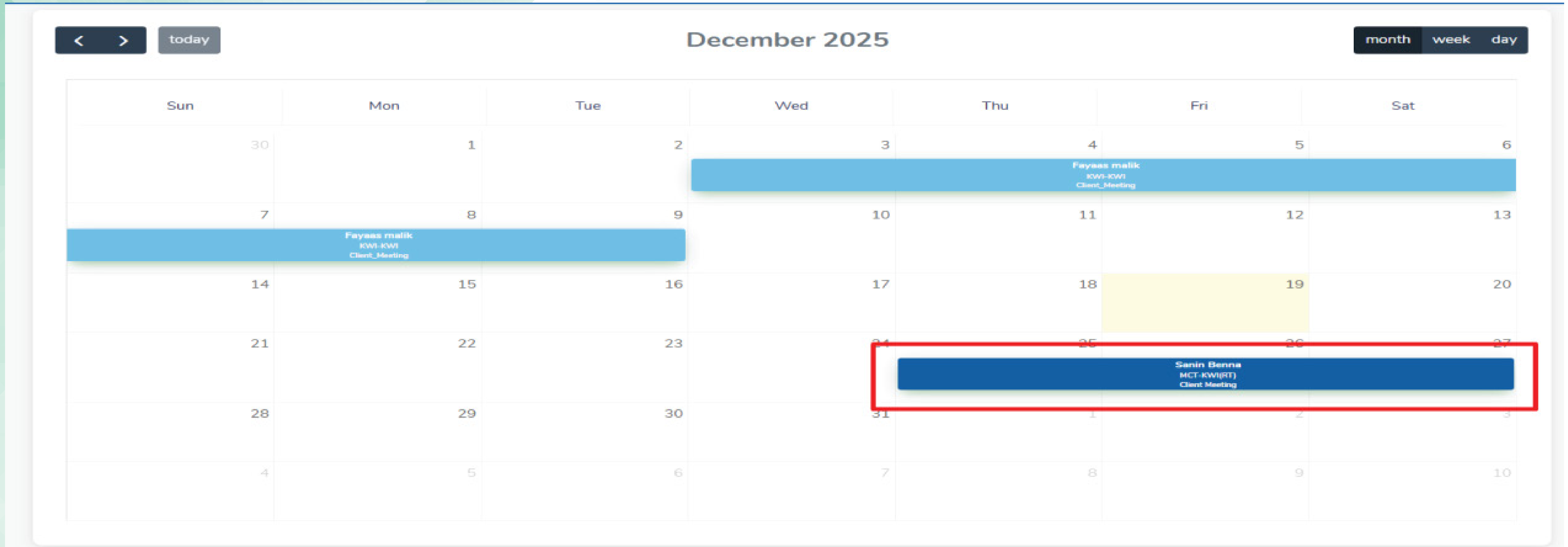
Access & Visibility:

An employee can view their own travel details in the calendar.

A Reporting Manager can view:

Their own travel details, and

The travel details of all employees under their department.



MANAGE DEPENDENT

The **Reports** module provides insights into travel bookings, expenses, and patterns across the organization.

Available Reports

Sales Report: Displays sales details and revenue generated from travel bookings.

Cabin Class Report: Shows booking distribution based on cabin class (Economy, Business, First, etc.).

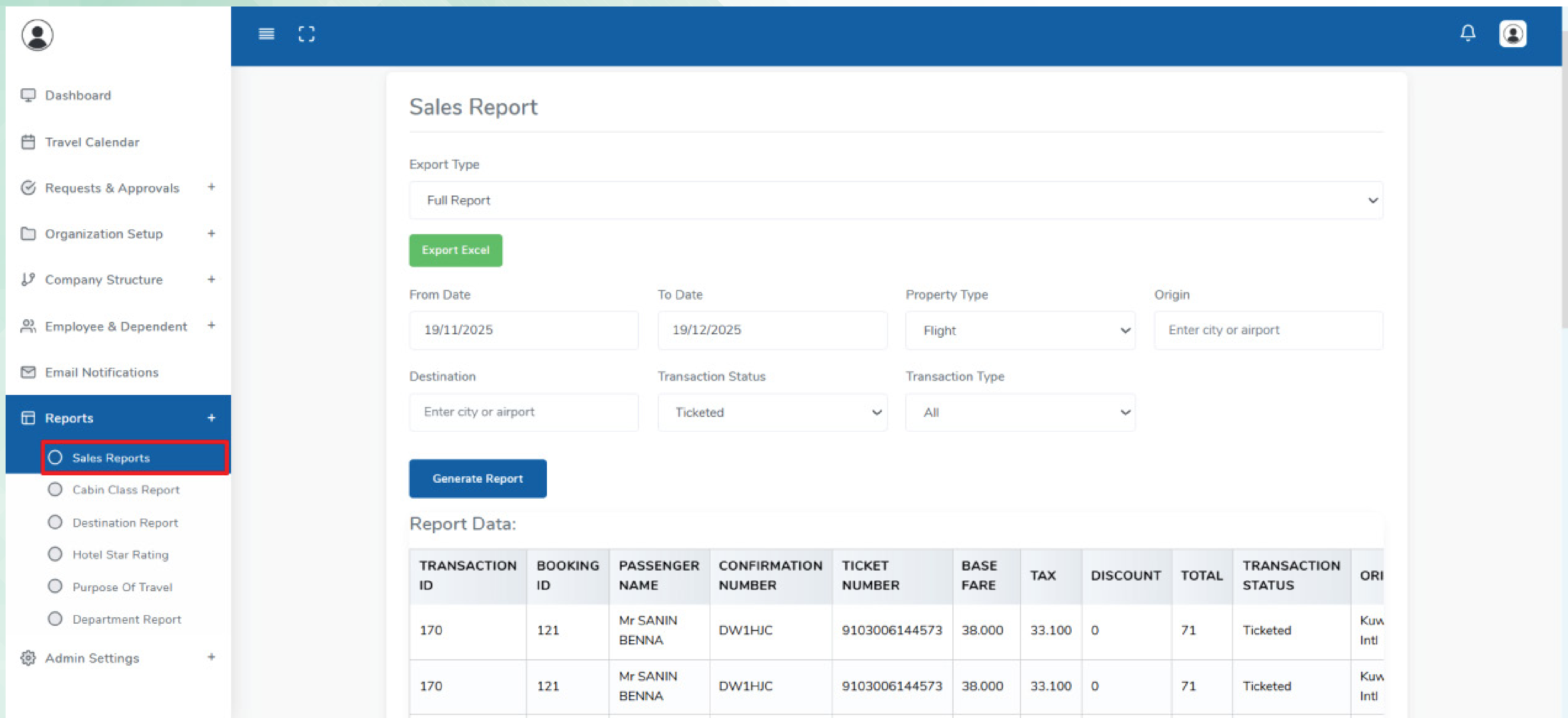
Destination Report: Provides insights into frequently traveled destinations.

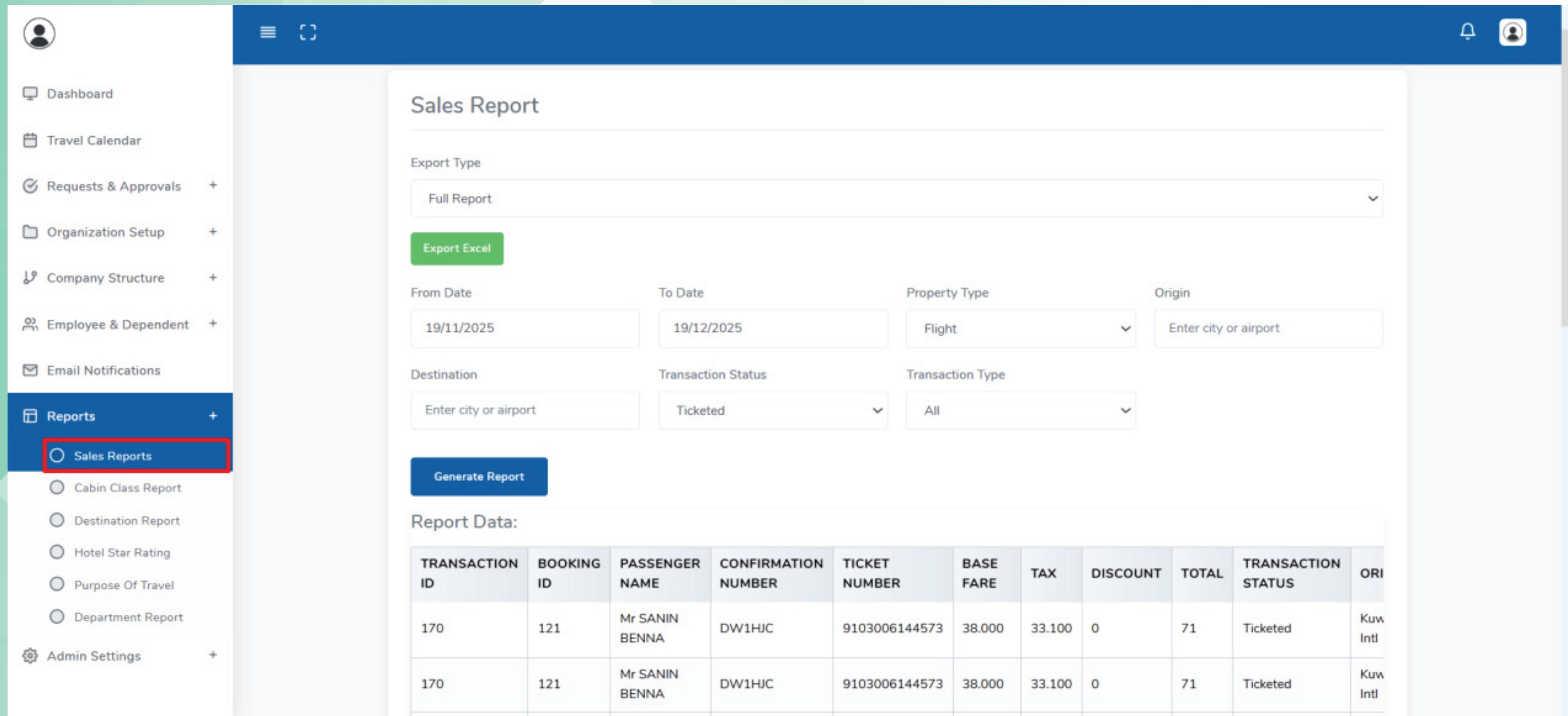
Hotel Star Rating Report: Displays hotel bookings grouped by star rating.

Purpose of Travel Report: Shows travel revenue categorized by the purpose of travel (e.g., Client Meeting, Team Meeting).

Department Report: Displays travel data and expenses grouped by department.

Non-AirReport: Displays consolidated revenue details for non-air bookings(Hotel,Transfer,Train,Rental car).




Dashboard
Travel Calendar
Requests & Approvals
Organization Setup
Company Structure
Employee & Dependent
Email Notifications
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Sales Report
Export Type
Full Report
Export Excel
From Date
19/11/2025
To Date
19/12/2025
Property Type
Flight
Origin
Enter city or airport
Destination
Enter city or airport
Transaction Status
Ticketed
Transaction Type
All
Generate Report
Report Data:
TRANSACTION ID
BOOKING ID
PASSENGER NAME
CONFIRMATION NUMBER
TICKET NUMBER
BASE FARE
TAX
DISCOUNT
TOTAL
TRANSACTION STATUS
170
121
Mr SANIN BENNA
DW1HJC
9103006144573
38.000
33.100
0
71
Ticketed
170
121
Mr SANIN BENNA
DW1HJC
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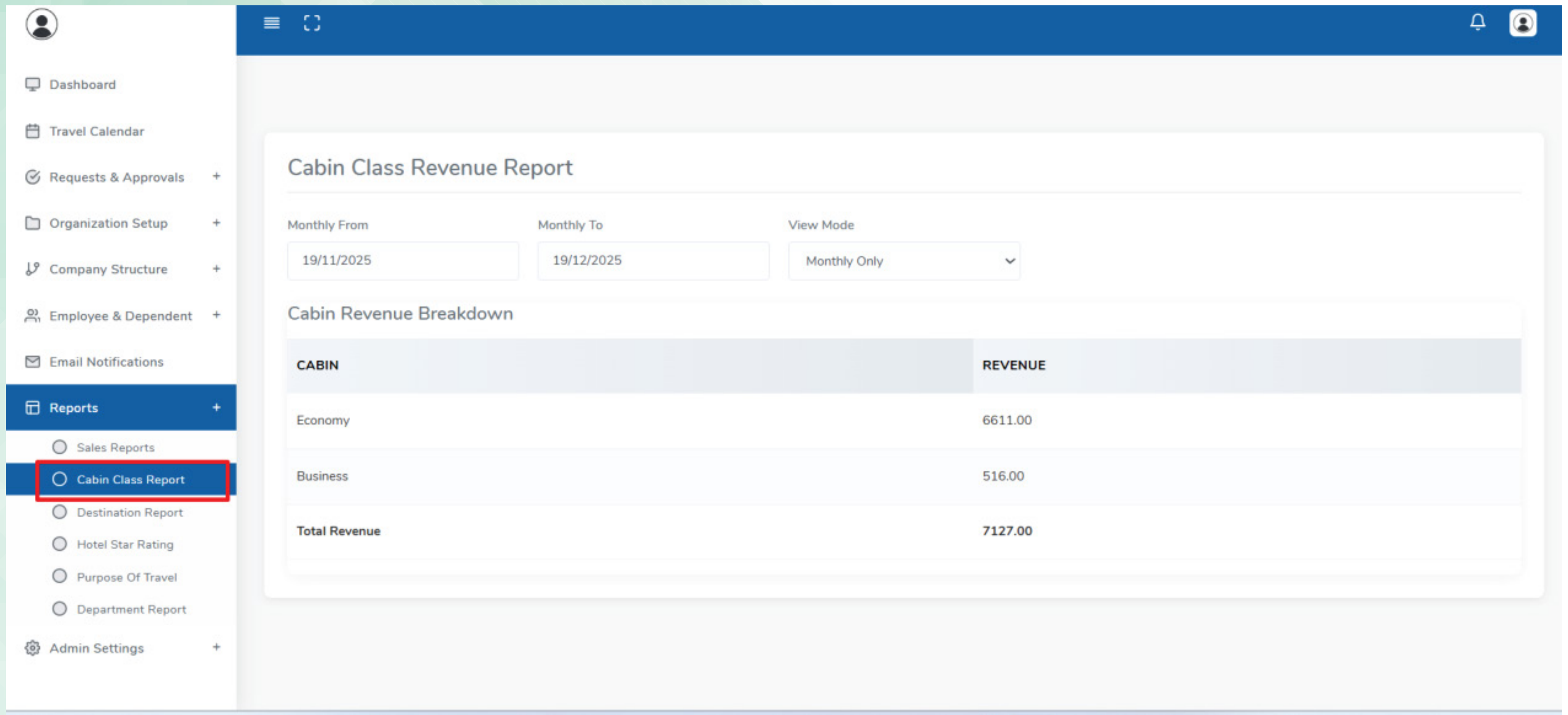
33.100
0
71
Ticketed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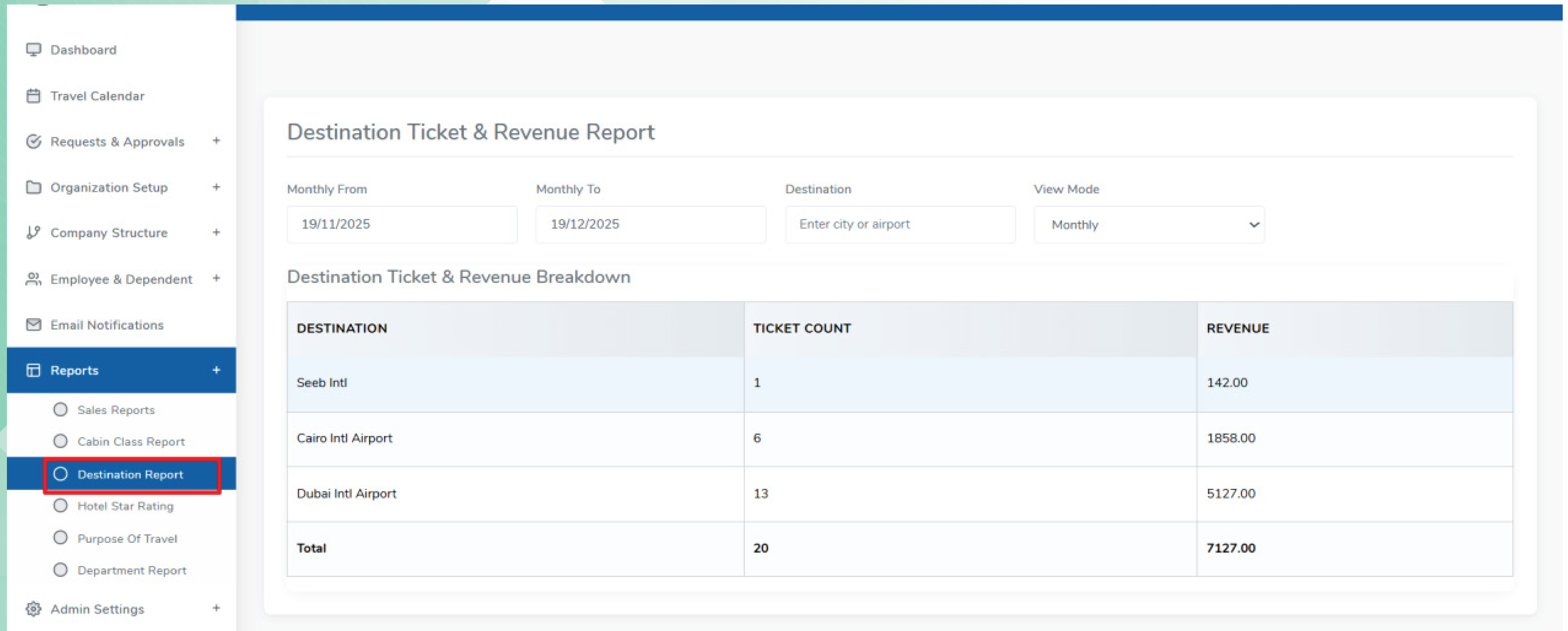
Email Notifications
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Cabin Class Revenue Report
Monthly From
19/11/2025
Monthly To
19/12/2025
View Mode
Monthly Only
Cabin Revenue Breakdown
CABIN
REVENUE
Economy
6611.00
Business
516.00
Total Revenue
7127.00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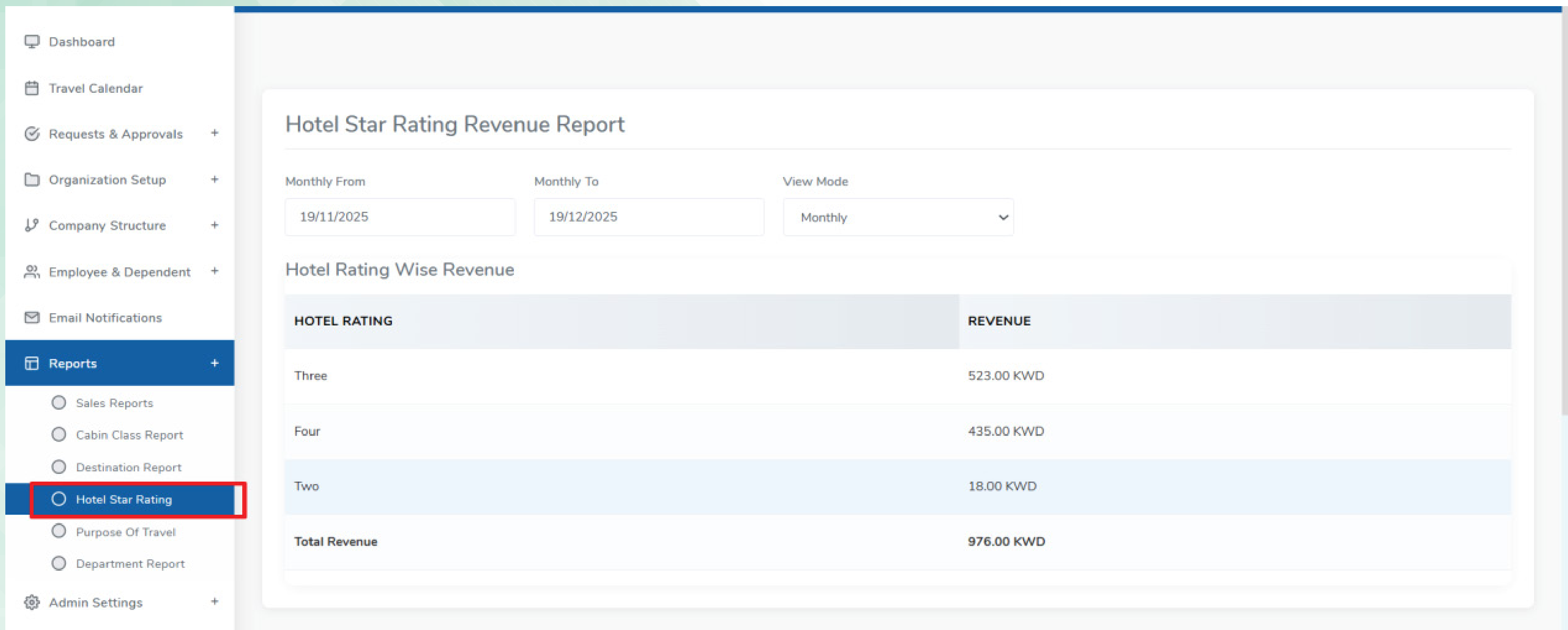
Employee & Dependent
Email Notifications
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Destination Ticket & Revenue Report
Monthly From
19/11/2025
Monthly To
19/12/2025
Destination
Enter city or airport
View Mode
Monthly
Destination Ticket & Revenue Breakdown
DESTINATION
TICKET COUNT
REVENUE
Seeb Intl
1
142.00
Cairo Intl Airport
6
1858.00
Dubai Intl Airport
13
5127.00
Total
20
7127.00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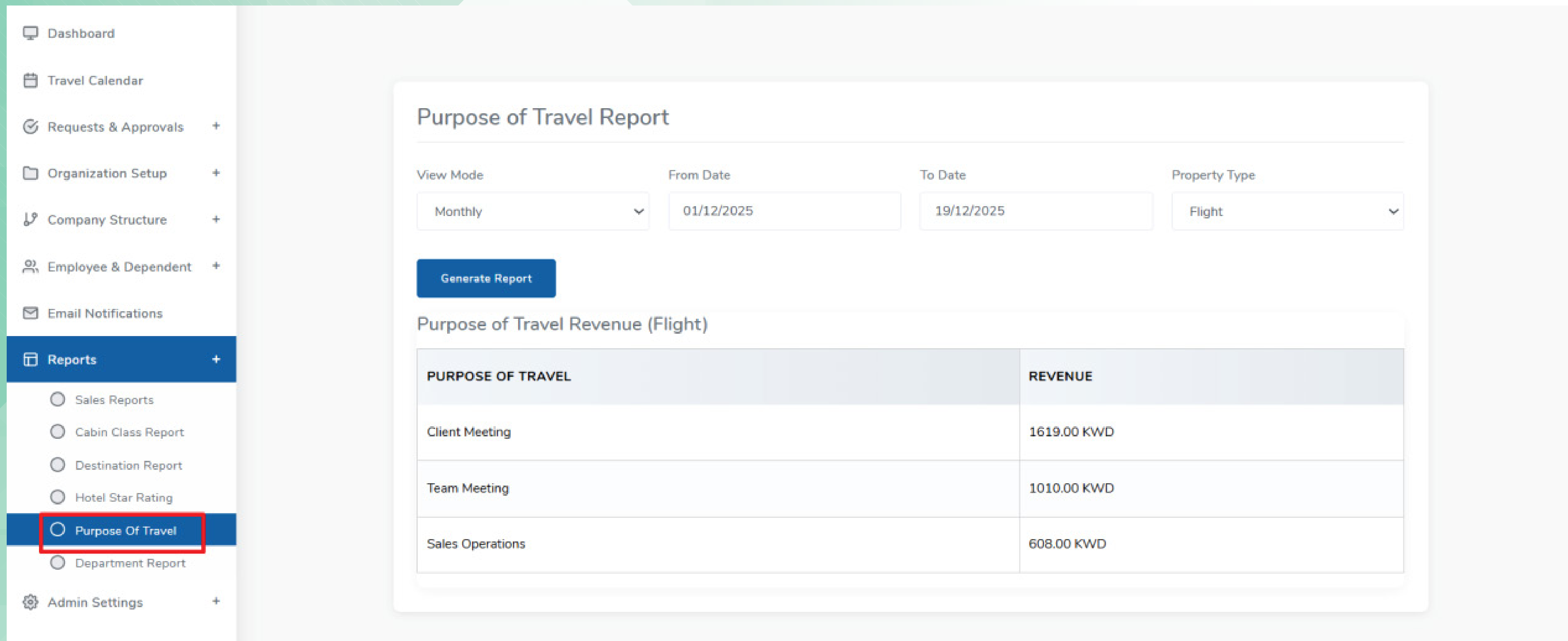
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Hotel Star Rating Revenue Report
Monthly From
19/11/2025
Monthly To
19/12/2025
View Mode
Monthly
Hotel Rating Wise Revenue
HOTEL RATING
REVENUE
Three
523.00 KWD
Four
435.00 KWD
Two
18.00 KWD
Total Revenue
976.00 KWD


Dashboard
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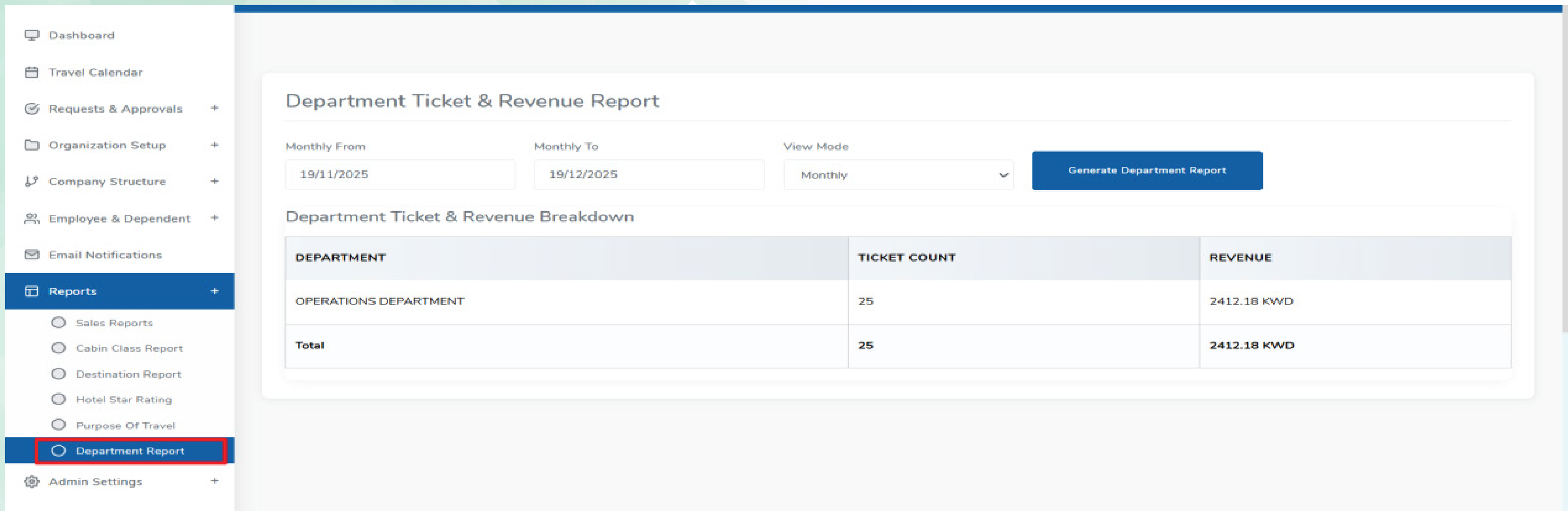
Organization Setup
Company Structure
Employee & Dependent
Email Notifications
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Purpose of Travel Report
View Mode
Monthly
From Date
01/12/2025
To Date
19/12/2025
Property Type
Flight
Generate Report
Purpose of Travel Revenue (Flight)
PURPOSE OF TRAVEL
REVENUE
Client Meeting
1619.00 KWD
Team Meeting
1010.00 KWD
Sales Operations
608.00 KWD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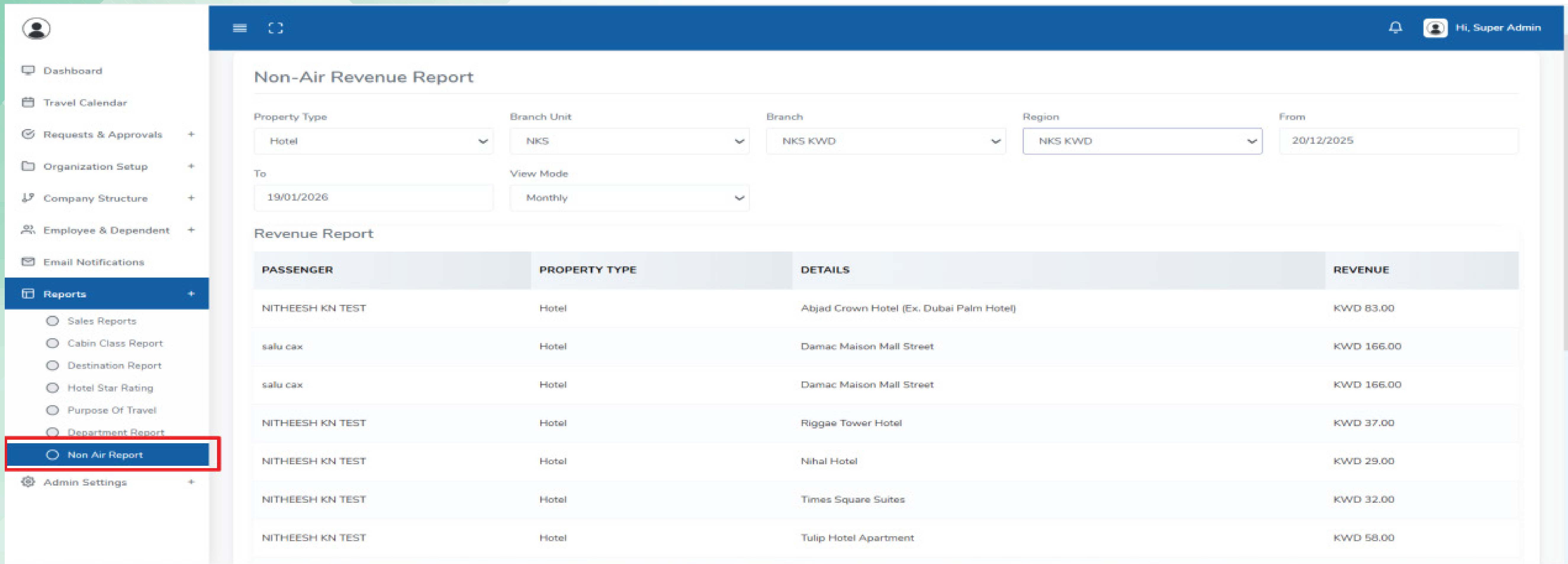
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Admin Settings
Department Ticket & Revenue Report
Monthly From
19/11/2025
Monthly To
19/12/2025
View Mode
Monthly
Generate Department Report
Department Ticket & Revenue Breakdown
DEPARTMENT
TICKET COUNT
REVENUE
OPERATIONS DEPARTMENT
25
2412.18 KWD
Total
25
2412.18 KWD


Hi, Super Admin
Dashboard
Travel Calendar
Requests & Approvals
Organization Setup
Company Structure
Employee & Dependent
Email Notifications
Reports
Sales Reports
Cabin Class Report
Destination Report
Hotel Star Rating
Purpose Of Travel
Department Report
Non Air Report
Admin Settings
Non-Air Revenue Report
Property Type
Hotel
Branch Unit
NKS
Branch
NKS KWD
Region
NKS KWD
From
20/12/2025
To
19/01/2026
View Mode
Monthly
Revenue Report
PASSENGER
PROPERTY TYPE
DETAILS
REVENUE
NITHEESH KN TEST
Hotel
Abjad Crown Hotel (Ex. Dubai Palm Hotel)
KWD 83.00
salu cax
Hotel
Damac Maison Mall Street
KWD 166.00
salu cax
Hotel
Damac Maison Mall Street
KWD 166.00
NITHEESH KN TEST
Hotel
Riggae Tower Hotel
KWD 37.00
NITHEESH KN TEST
Hotel
Nihal Hotel
KWD 29.00
NITHEESH KN TEST
Hotel
Times Square Suites
KWD 32.00
NITHEESH KN TEST
Hotel
Tulip Hotel Apartment
KWD 58.00

THANK YOU

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Manama

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