

Agent Management/CRM

Everything related to management of Agent users. Including Schools.

- [Agent Contact Management](#)
 - [How to: Assign or Remove Contacts/Agent to Contact Group\(s\)](#)
 - [How to: Create or Remove a Contact Group](#)
 - [How to: Add Contact details to a contact \(Agent\).](#)
 - [How to: Export a list of emails from a Contact Group](#)
 - [How to: Create a New Agent in CustomLinc](#)
- [Agent Portal](#)

Agent Contact Management

- Agents**

UnR	Contact Name	Payment Method	MYOB Code	Contact
	Australia and New Zealand Tour Specialists	Invoice	ANZTS	Add selected Contacts to Contact Group Australia and New Zealand Tour Specialists Contact Id: 3000119 Last Modified: 05/09/2014 16:49 Contact Types: Agent Location: United Kingdom Agent Type: Invoice Source of Business: Inbound Tour Operator Activity Status: Active Currency: Australian Dollar Base Commission: SP knows Agent as: ANZTS

Filter: Unresolved Items

3.

Sel	Contact Name	Payment Method	Tencia Code	Source of Business	Product	Con
☒	Puffing Billy	Invoice	PUFFING_BILLY	(default)		Con
☐	Puffing Billy Operations	Payment - Prepay	PBROPS	(default)	20% Special ITOs API TI - Net Pri	Last
☐	Puffing Billy Preservation Society	Invoice	PBPS	(default)	TO-MC 15% & LAKE 20% - Net Pi	Bus

Add Contact(s) to...

Results

- TO - 10%
- 10% single 10% return School
- 10% single 20% return School
- TO - 20% ATM Special
- TO-MC 15% & LAKE 20%
- TO - 20%
- TO - 25%
- The Andrews Foundation Funding Gr
- Archived
- TO-MC 10% & LAKE 20%
- Incentive Belgrave to Em/Lake Tier 1
- Incentive Belgrave to Em/Lake Tier 2
- OTA-API 20%
- Partnership Program
- Payment - Other (Prepay)
- Schools & Education

Select Cancel

filter: Unresolved Items

Date/Time	Subject	From	To
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- This will pop up the list of Contact Groups that can be allocated, double click on the one you wish to add
- Repeat until you have added all the Contact Groups you wish to.

You can add multiple Contacts (agents) to a Contact Group at the same time. However, you **cannot** add multiple **Groups to a Contact**, this has to be done one at a time.

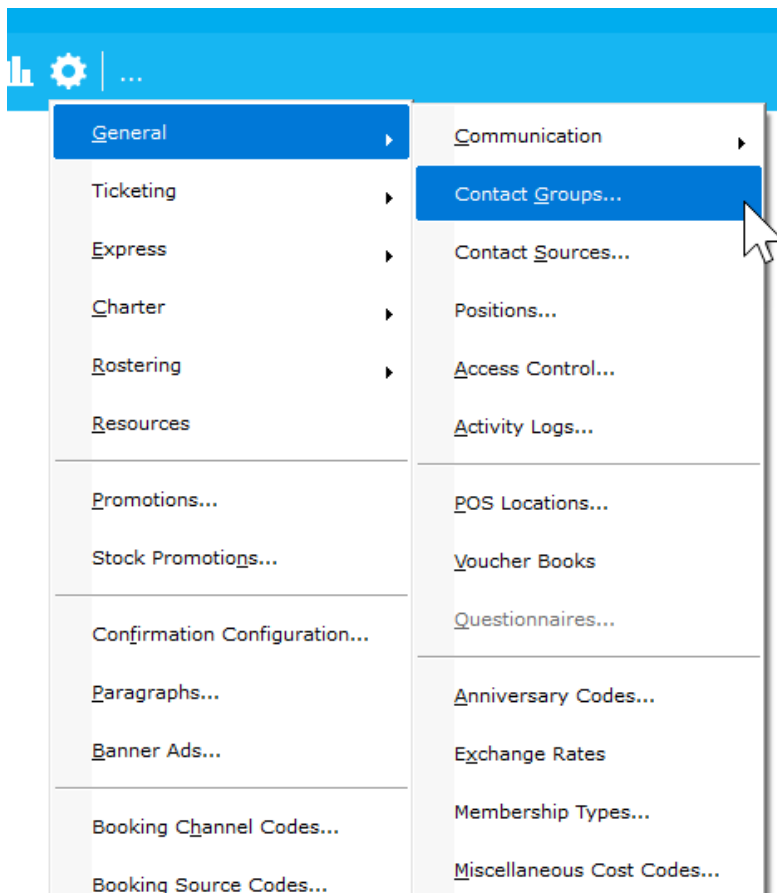
To remove a contact group from a contact

- Right click on the Contact Group you wish to remove
- Select Delete



How to: Create or Remove a Contact Group

1. Go to **Settings > General > Contact Groups**



2. Select **ADD** > fill in template > SAVE



Contact Groups

×

Show Menu

☐ Show archived

Contacts	Code	Descrip
3	10_10 DISC	10% sin
260	10_20 DISC	10% sin
0	20% ATM SPECIAL	TO - 20%
269	20% GENERAL	TO-MC 1
146	20% SPECIAL	TO - 20%
1	25% INBOUND	TO - 25%
36	ANDREWS	The And
40	ARCHIVE	Archived
1	CONCESSION	TO-MC 1
0	INCENT1	Incentiv
0	INCENT2	Incentiv
6	OTA	OTA-API
19	PARTNFR	Partners

Details

Code

☐ Archived

Description

Campaign List Id

Agents

☐

Members

☐

Suppliers

☐

Chain

☐

Notes

Save

Cancel

Remove

Next >>

Copy

Close

You can also edit existing templates by selecting - You cannot add or remove Contacts from the group here. Please refer to [How to: Assign or Remove...](#) | [BookStack](#)

How to: Add Contact details to a contact (Agent).

1. **Contacts** screen
2. Search for Contact
3. Double-click on Contact

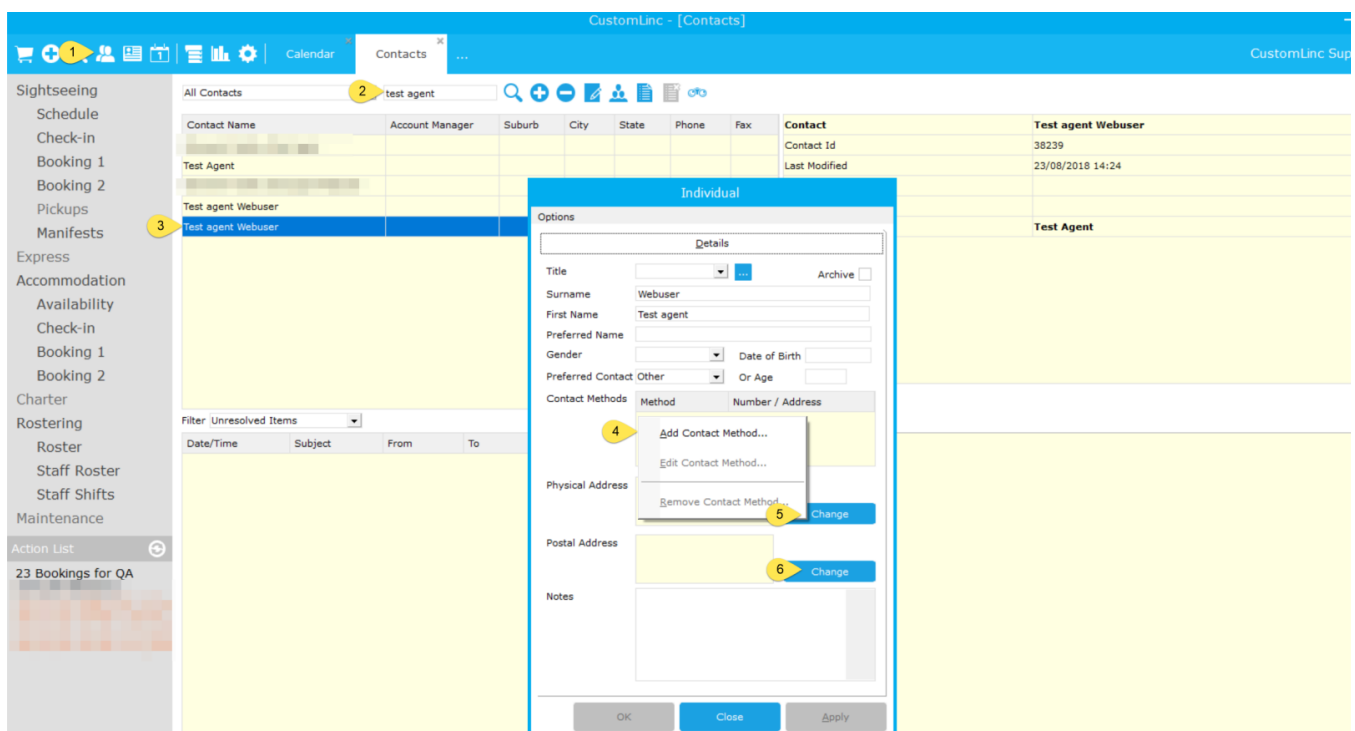
Organisation

4. Select **Add** to add Postal and Physical addresses
5. Select **Add** to add Email, Phone, Fax, Facebook, Twitter and website

Adding_Email_Phone_Address_etc_to_Organisation.png

Individual

4. Right-click under **Contact Methods** and select **Add Contact Method...** to add Email, Phone, Fax, Facebook, Twitter and website
5. Select **Change** to add/edit a Physical Address
6. Select **Change** to add/edit a Postal Address



Changing existing Contact Methods on a Contact

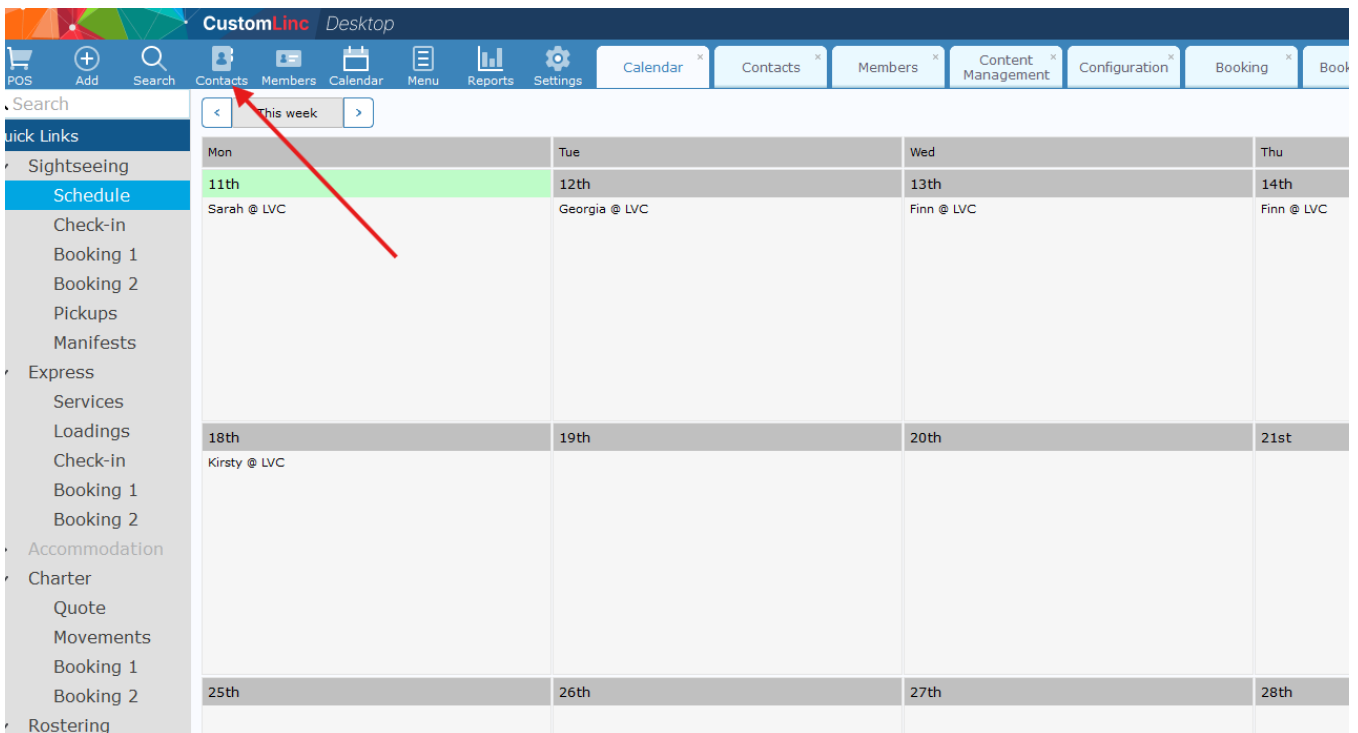
Existing Contact Methods will appear on the right of the screen when the Contact is selected as at 1 below as an example.

1. Double-click on the Contact Method
2. Change details as required and select **OK**

Changing_existing_Contact_Methods_on_a_Contact.png

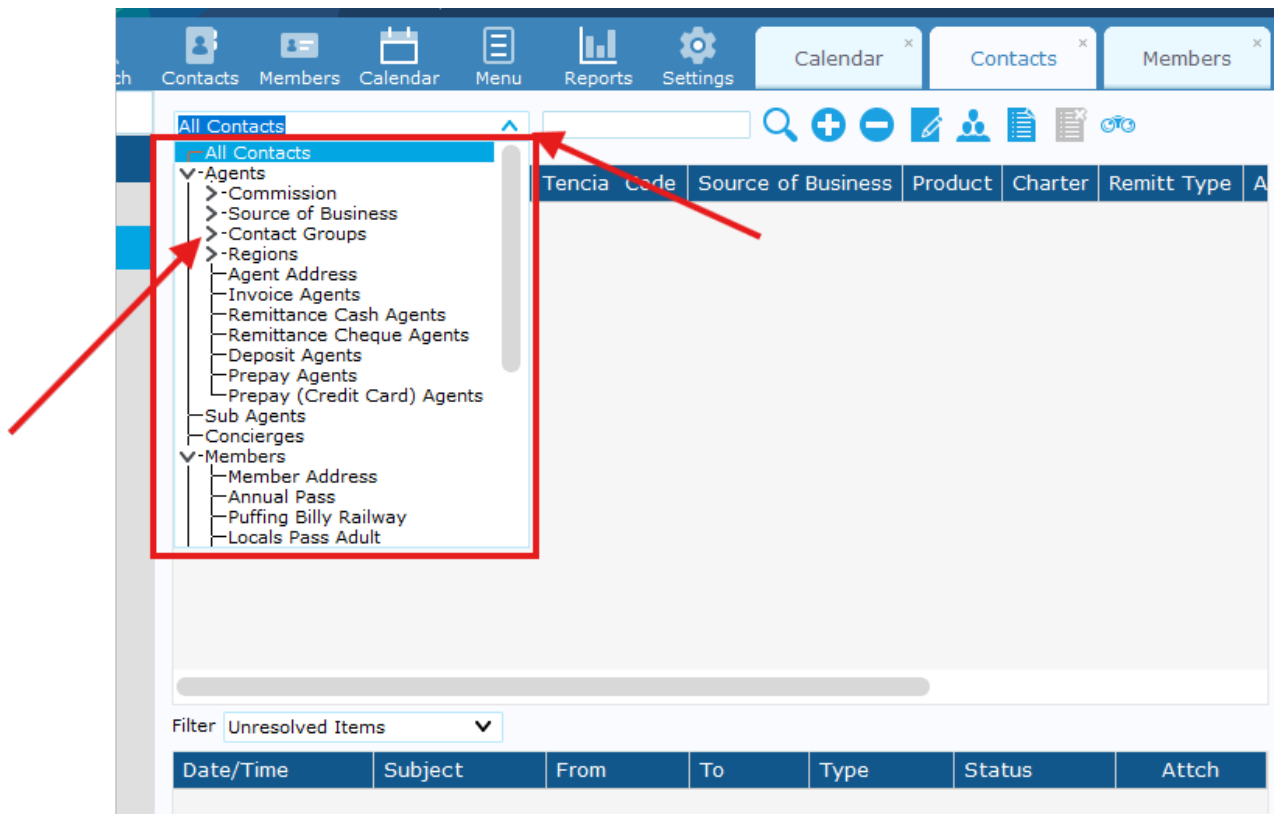
How to: Export a list of emails from a Contact Group

1. Go to **Contacts**

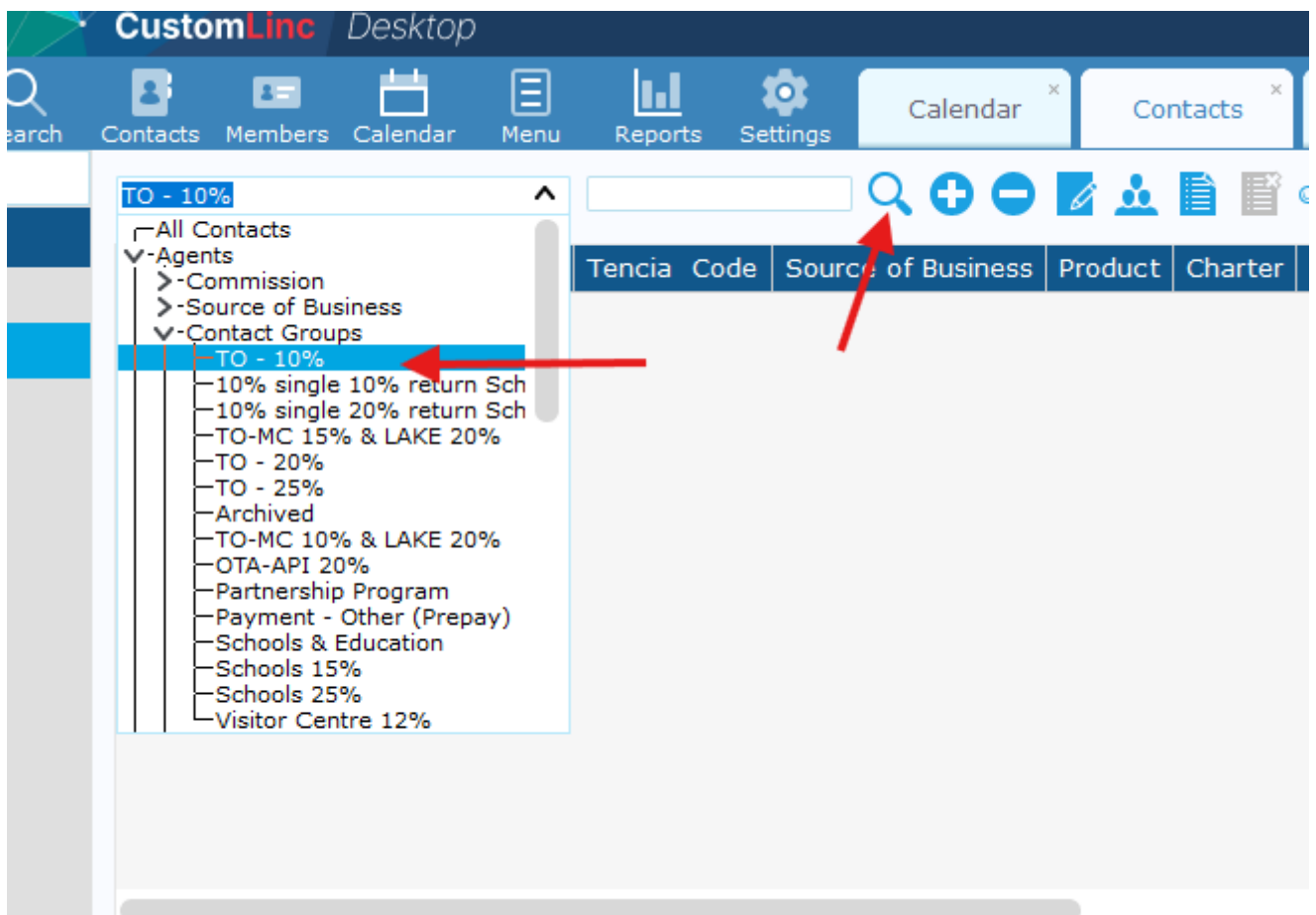


2. Select the Contacts drop down to search for a contact filter.

- From here you can click the arrows to expand the filters, the following are examples.
 - **Contact Groups** are managed on a per agent basis - an Agent (contact) can have **multiple Contact Groups** associated.
 - **Commission** is managed per Agent under **contract** an agent will only have **one active commission** at a time.



3. Select a filter and click **search** (Magnifying Glass)



4. Once all agents are loaded, **right click** any agent on the left side, select Export > CSV file

UnR	Contact Name	Payment	Contact
37	A & A Travel	Payment	Contact Id
	A & B Business Link Pty Ltd T/A Melbourne Limo Link	Payment	Last Modified
400	A Petite Tour	Invoice	Business Email
	A Plus Travel	Payment	Accounts Email
	Aconcept Group	Payment	Accounts Email
	AKW Tours	Payment	WWW
	AmazingCo Amazing co	Payment	
15	AMIG Travel	Payment	Contact Types
2	APSE TOURS PTY LTD	Payment	Physical Address
39	Around & About Tours	Payment	Contact Groups
	Asia Vacation Group Pty Ltd	Payment	Tax Number
183	AU VIP Trips T/S AU VIP TOUR	Payment	
	Aus Star Traveling Pty Ltd	Payment	

Date/Time	Subject	From	To

Filter	Unresolved Items

Attach

Export	CSV file

Properties...	CSV File with Agent Commission

5. It will ask you to select a save locations, then it should automatically open up.

In the CSV you will find an **EmailBusiness** header - This is the primary contact for each agent.

6. You can highlight all cells email cells then **copy & paste** these into the **To** section in Outlook.

How to: Create a New Agent in CustomLinc

1. Go to **Contacts** > Add Contact (+) > Click **Organisation**
2. **Fill in the Name & any other relevant data on the left side** - A code is required but is not used unless they are on account.

We would recommend doing some sort of Business initials like PBR or PBRB for example.

> **Hit Apply**

You will fill in Business Address and Contact Email in step 5.

Organisation

Contact Details

Code: DTC

Name: Dylan Test

Country: Australia

State: VIC

Tax Number: ☒ Tax Reg?

Bank:

Bank and Branch:

Account Number:

Swift Code:

Account Name:

FX Account Number:

Parent Organisation:

Primary Acct Mgr:

Secondary Acct Mgr:

Tertiary Acct Mgr:

Source:

Archived: ☐

Type:

Type	Address
------	---------

Add Edit Remove

Type:

Type	Phone / Fax / Email / Web
------	---------------------------

Add Edit Remove

Merge Next >> OK Cancel Apply

3. Select **"Agent"** > Click **Okay**

4. Select Apply, and close the windows to get back into the contact page

Agent - Dylan Test

Details

Tencia Code: DTC

Activity Status *: Active

Remittance Type:

Source of Business *: (default)

Report Category:

Licence No.:

Consolidate: ☐

Send details to...

Vendor Name:

CustomLine Network:

Split Payments:

Send agent confirmation (External Channels): ☐

Send customer confirmation (External Channels): ☐

Booking Defaults

Search

Merge Concierge

OK

Close

Apply

5. You should see the user on the left-hand side - **double click** and fill in contact details such as **address and email contact**.

Contacts

Account Manager

Suburb

City

State

Phone

Fax

Filter: Unresolved Items

Date/Time

Subject

From

To

Type

Status

Attach

Contact

Contact Id: 960849

Last Modified: 04/09/2025 11:59

Contact Types: Agent

Location: Australia - VIC

Source of Business: (default)

Activity Status: Active

SP knows Agent as: DTC

Total Pax before Invoicing: No

Organisation

Contact Details

Code:

Name:

Country: ▼

State: ▼

Tax Number: ☒ Tax Reg?

Bank:

Bank and Branch:

Account Number:

Swift Code:

Account Name:

FX Account Number: ▶

Parent Organisation: ...

Primary Acct Mgr: ▼ ...

Secondary Acct Mgr: ▼

Tertiary Acct Mgr: ▼

Source: ▼

Archived: ☐

Type	Address

Add
Edit
Remove

Type	Phone / Fax / Email / Web

Add
Edit
Remove

Merge
OK
Close
Apply

6. **Apply & close** this window > **Double Click "Agent"** in the contact type tab.

Contacts Members Calendar Menu Reports Settings Calendar Express Schedule Configuration Express Loadings Booking Status Messages Search 1003072 FOD BENEDI Report Library Transactions Report Contacts ...

All Contacts

Contact Name	Account Manager	Suburb	City	State	Phone	Fax
Dylan Test						

Contact	Dylan Test
Contact Id	960849
Last Modified	04/09/2025 11:59
Contact Types	Agents ←
Location	Australia - VIC
Source of Business	(default)
Activity Status	Active
SP knows Agent as	OTC
Total Pax before Invoicing	No

Filter: Unresolved Items

Date/Time	Subject	From	To	Type	Status	Attach

7. Go to the **contracts** area> **Right click** the grey space > Click **Add**

Agent - Dylan Test

Details
Contracts
Integration
Booking Defaults
Modules
Brands
Advanced Options
Snippets

Details

Tencia Code
Activity Status *
Remittance Type
Source of Business * (default)
Report Category
Licence No.

Agent Contracts

Booking From	Booking To	Travelling From	Travelling To	Description	Type	Net
Add...						

Integration

API Key
Send details to...
Vendor Name
CustomLinc Network
Split Payments
☐ Send agent confirmation (External Channels)
☐ Send customer confirmation (External Channels)

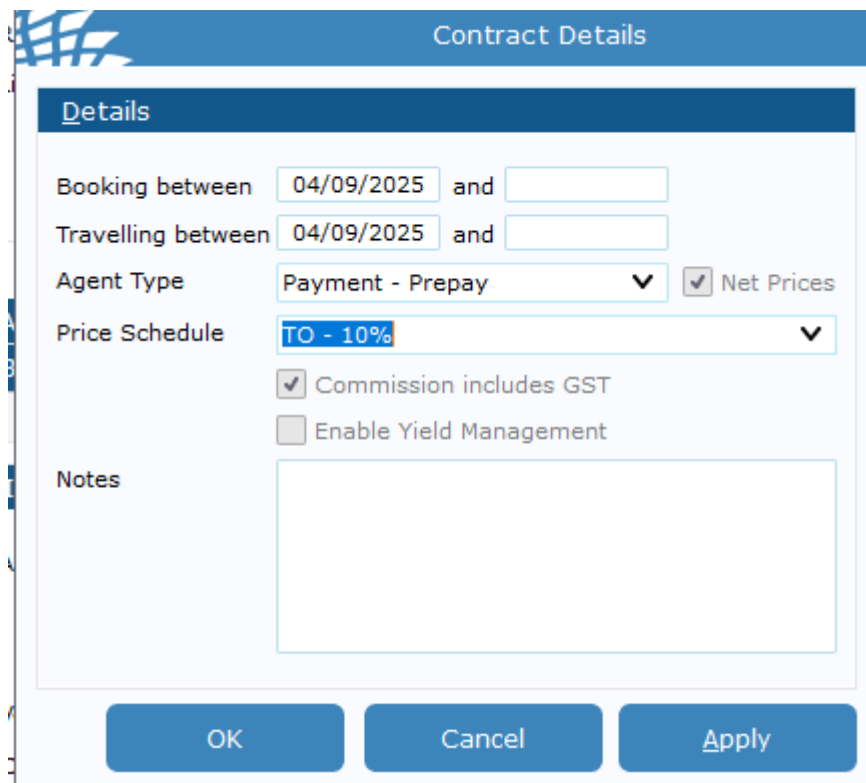
Booking Defaults

Merge Concierge
OK
Close
Apply

8. Fill in details:

- Booking Between - *Usually set day after request to prevent any issues with any bookings made that day;*
- Travelling between *Usually set day after request to prevent any issues with any bookings made that day ;*
- **Agent type** is the payment process the agent uses (**Invoice or Prepaid**);
- **Price schedule** is their commission rate.

If an end date is put into this field the contract will be removed after that date.



The image shows a 'Contract Details' dialog box with a blue header bar. Inside, there's a 'Details' section with several fields: 'Booking between' and 'Travelling between' both have '04/09/2025' in the first date field and an empty second field. 'Agent Type' is set to 'Payment - Prepay' with a dropdown arrow, and 'Net Prices' is checked. 'Price Schedule' is set to 'TO - 10%' with a dropdown arrow. Below these are two checkboxes: 'Commission includes GST' (checked) and 'Enable Yield Management' (unchecked). A 'Notes' section with a text area is at the bottom. At the very bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

Contract Details

Details

Booking between 04/09/2025 and

Travelling between 04/09/2025 and

Agent Type Payment - Prepay ☒ Net Prices

Price Schedule TO - 10%

☒ Commission includes GST

☐ Enable Yield Management

Notes

OK Cancel Apply

9. If the Agent is a school, you also need to go to **Booking Defaults > Booking Source** and set it to **School**.

Details

Contracts

Integration

Booking Defaults

Modules

Brands

Advanced Options

Snippets

Booking Defaults

Currency *

Australian Dollar

Booking Method

Booking Source

Country/State

Pickup Point

Web Lead Time (hrs)

Web Edit Lead Time

Modules

☐ Use in Accommodation

☐ Use in Charter

☐ Use in Express

☒ Use in Sightseeing

Can book Product from these Brands

Sel	Brand
☐	Puffing Billy

Advanced Options

Agent Ref	Default to Source of Business
Default Promotion	
Allow Partial Receipt	false
Allow Receipt All	false
Allow Series Bookings	false
Exempt from Deposit	false
Filter Products offered to this Agent	false

Search

Merge Concierge

OK

Cancel

Apply

10. Finally go to brands and make sure Puffing Billy is ticked for the agent. > click **Apply** then close.



- Details
- Contracts
- Integration
- Booking Defaults
- Modules
- Brands**
- Advanced Options
- Snippets

Can book Product from these Brands

Sel	Brand
☒	Puffing Billy

Advanced Options

Agent Ref	Default to Source of Business
Default Promotion	
Allow Partial Receipt	false
Allow Receipt All	true
Allow Series Bookings	false
Exempt from Deposit	false
Filter Products offered to this Age	false
Confirmation Display Amount	Default

Snippets

Name	Size
------	------

Search

Merge Concierge

OK

Cancel

Apply

Agent Portal