

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.

The screenshot shows the 'Organisation' contact form in CustomLinc. The form is divided into two main sections: 'Contact Details' on the left and two tables on the right for 'Type' and 'Address'.

Contact Details:

- Code: DTC
- Name: Dylan Test
- Country: Australia
- State: VIC
- Tax Number: (empty)
- Bank: (empty)
- Bank and Branch: (empty)
- Account Number: (empty)
- Swift Code: (empty)
- Account Name: (empty)
- FX Account Number: (empty)
- Parent Organisation: (empty)
- Primary Acct Mgr: (empty)
- Secondary Acct Mgr: (empty)
- Tertiary Acct Mgr: (empty)
- Source: (empty)
- Archived: ☐

Tables:

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

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

Buttons:

- Add, Edit, Remove (for Type and Address tables)
- Next >>, OK, Cancel, Apply (at the bottom)
- Merge (bottom left)

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**.

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

All Contacts

Contact Name	Account Manager	Suburb	City	State	Phone	Fax
Dylan Test						

Filter: Unresolved Items

Date/Time	Subject	From	To	Type	Status	Attach
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Contact Details for Dylan Test:

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	Agent
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)

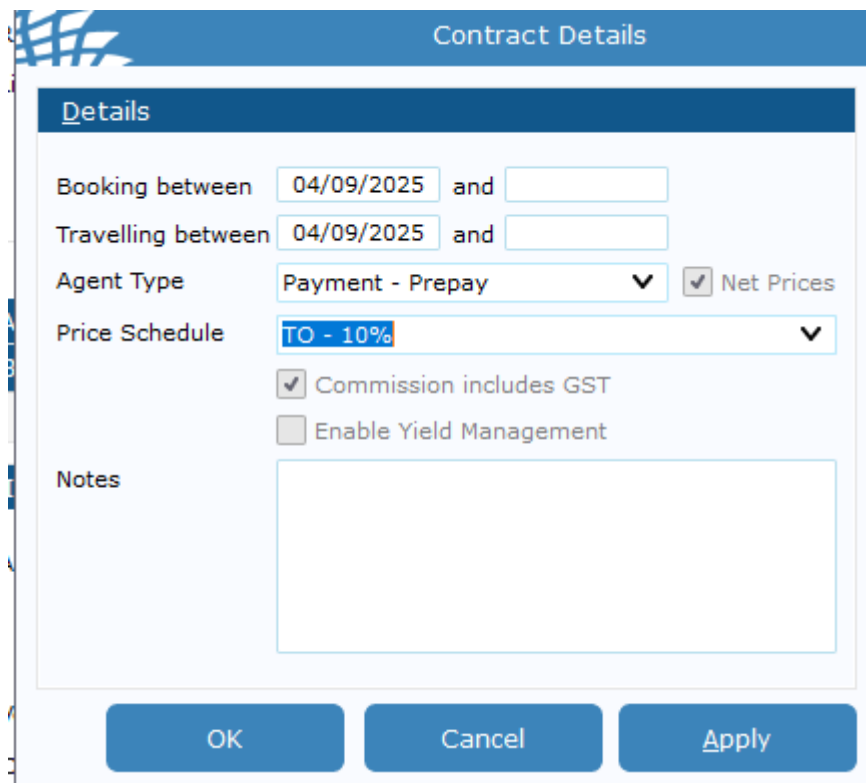
Booking Defaults

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**.

Agent - Dylan Test

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

Revision #4

Created 2025-09-04 00:58:09 UTC by Dylan Healey

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