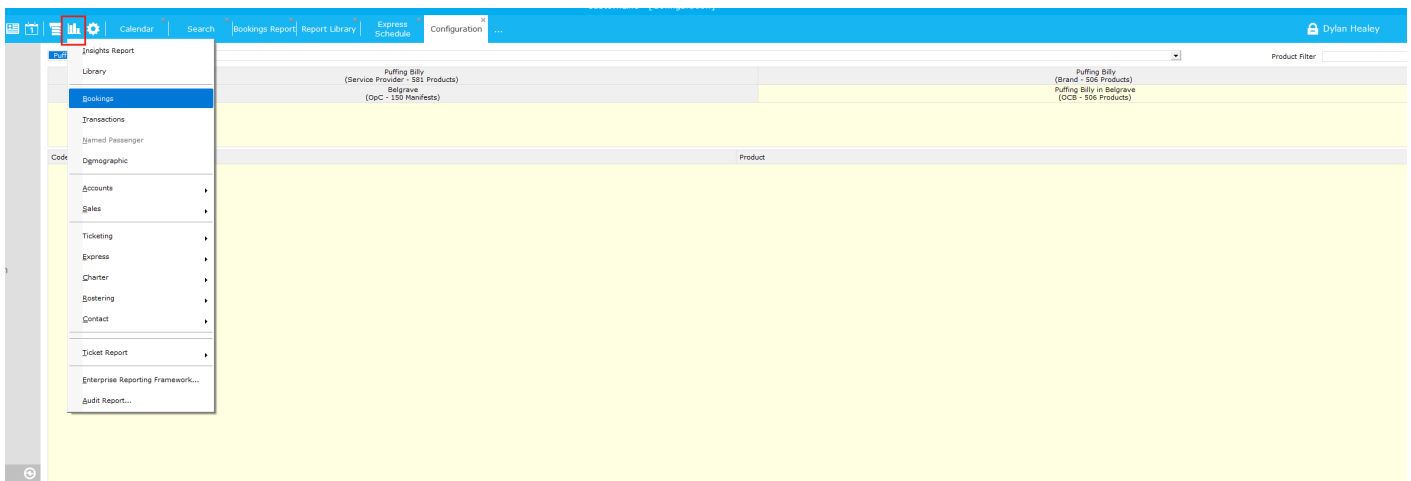


How to run a Customlinc Report

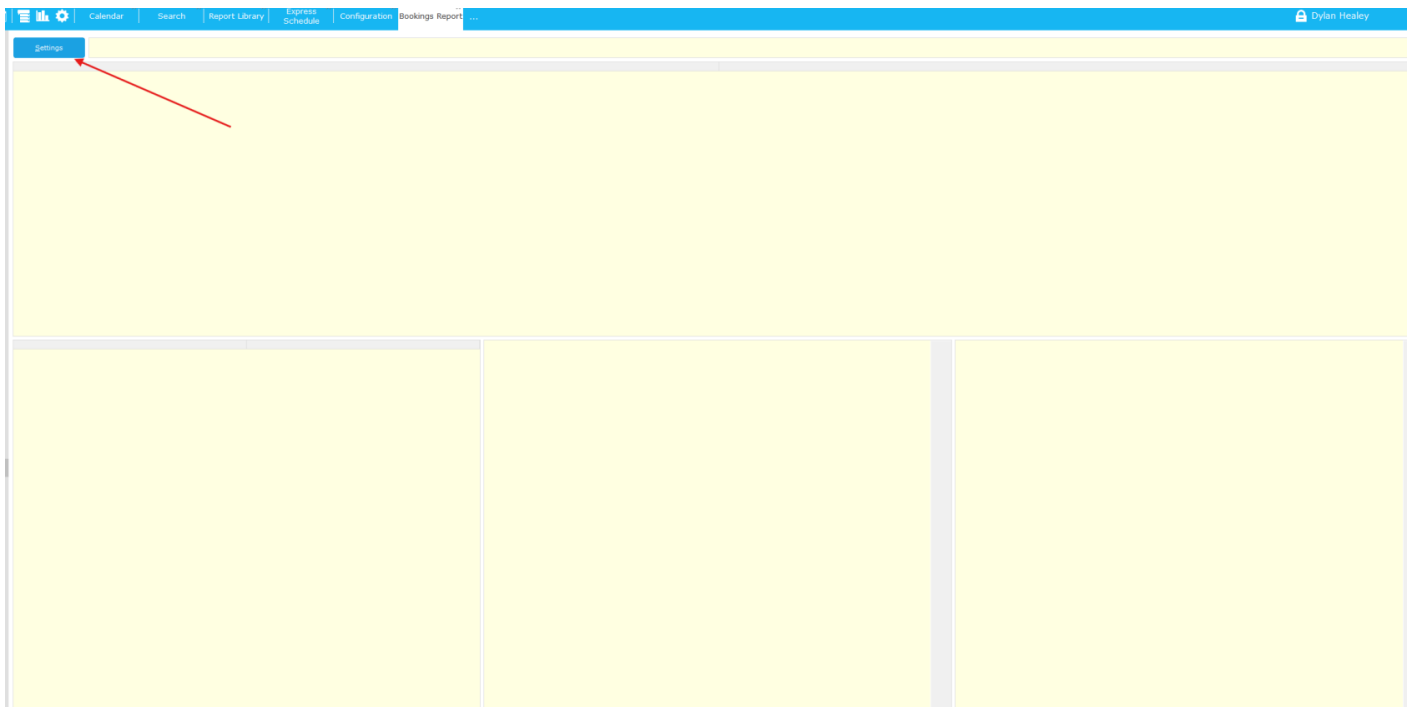
You can run several types of reports within CustomLinc to give more detailed information for large sections of bookings.

To do this click **Reports** tab in the top left

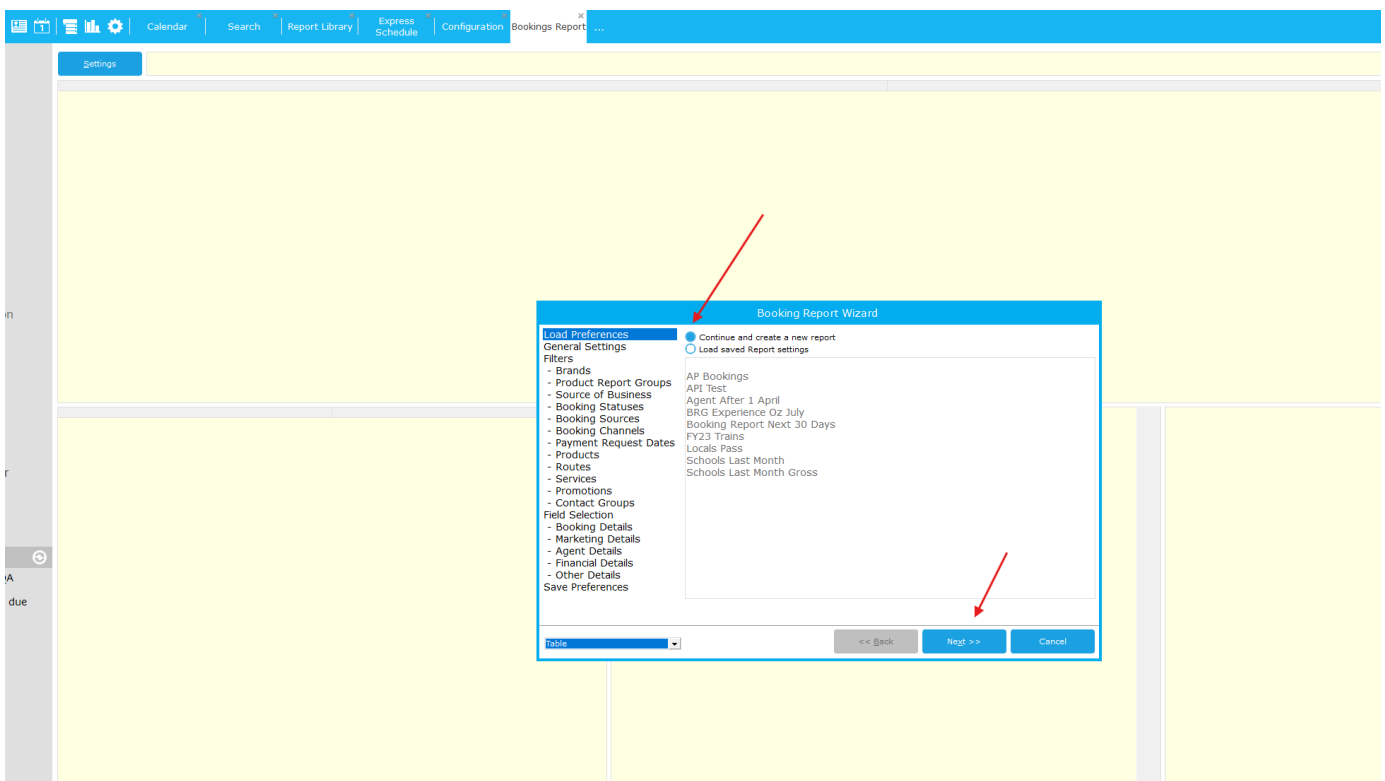


For this example we will run a **Bookings** report.

After clicking, bookings you will need to go to **Settings**



Select **continue and create a new report** then **Next**



Configure your search parameters.

Here I have selected to define my own dates of Date of Travel from 1/12/2024 to 31/12/2024, and only for travel booked under the agent WINE HOP

Booking Report Wizard

Load Preferences
General Settings
 Filters
 - Brands
 - Product Report Groups
 - Source of Business
 - Booking Statuses
 - Booking Sources
 - Booking Channels
 - Payment Request Dates
 - Products
 - Routes
 - Services
 - Promotions
 - Contact Groups
 Field Selection
 - Booking Details
 - Marketing Details
 - Agent Details
 - Financial Details
 - Other Details
 Save Preferences

Output Type: List
 Date range: User Defined
 From Date: 01/12/2024
 To Date: 31/12/2024
 Use: Date of Travel
 Group or FITs: All Bookings
 Sales Office:
 Booked By:
 Agent: WINE HOP
 Account Manager:
☒ Sightseeing
☒ Express
☐ Accommodation
☐ Charter
☐ Exclude Package Products
☐ Exclude Package Components
☐ Package Bookings Only
☐ Include Last Year's Bookings
☐ Include Open Dated Bookings
☐ Include Advanced Sales Fields
☐ Bookings with public notes
☐ Unreconciled Bookings Only

Table << Back Next >> Cancel

The next area is **filters**, here you can filter for certain things such as products, promotions and booking channels.

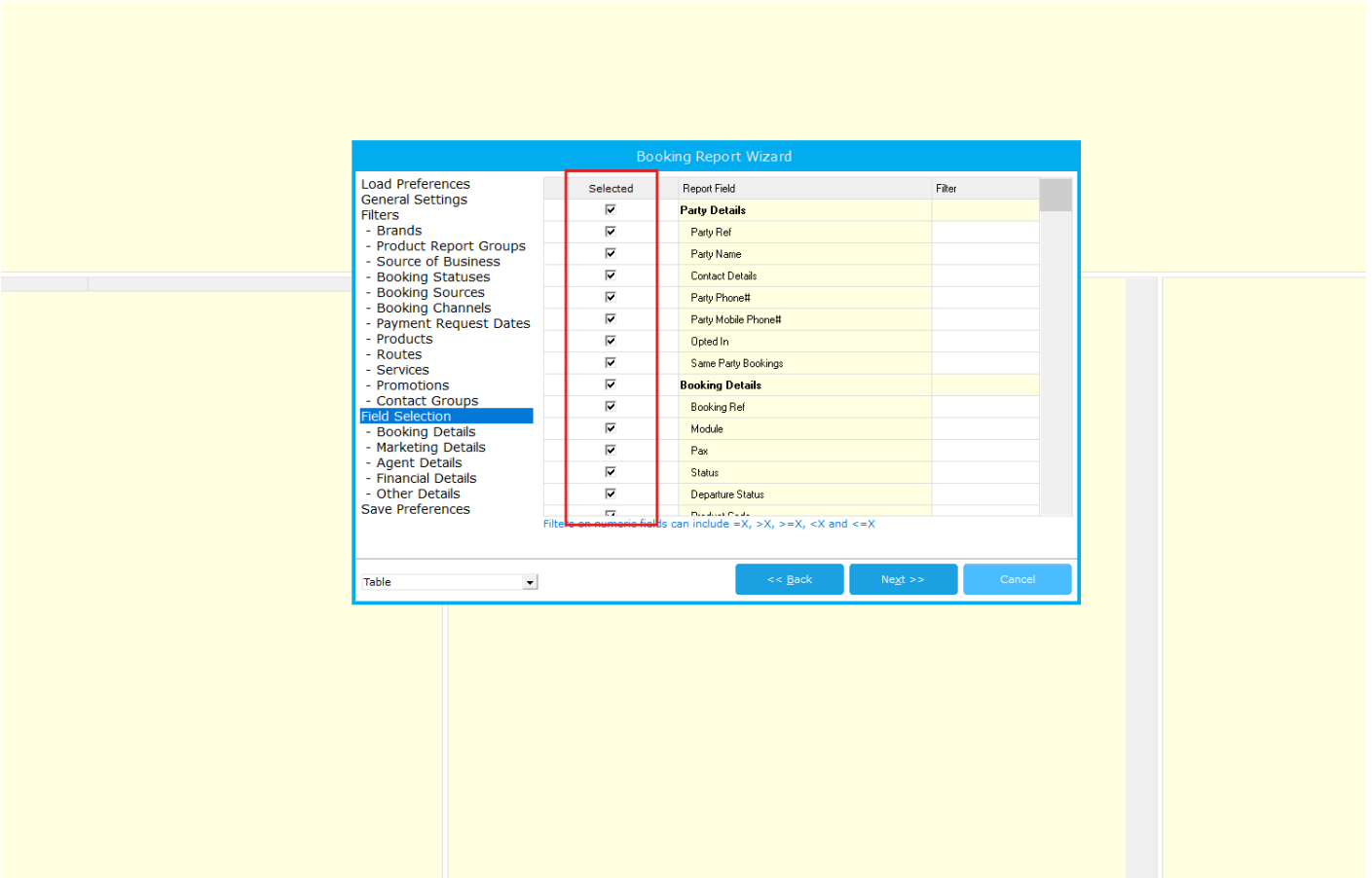
Booking Report Wizard

Load Preferences
General Settings
Filters
 - Brands
 - Product Report Groups
 - Source of Business
 - Booking Statuses
 - Booking Sources
 - Booking Channels
 - Payment Request Dates
 - Products
 - Routes
 - Services
 - Promotions
 - Contact Groups
 Field Selection
 - Booking Details
 - Marketing Details
 - Agent Details
 - Financial Details
 - Other Details
 Save Preferences

Selected	Brand
☒	Puffing Billy
☒	Puffing Billy Railway Social Club

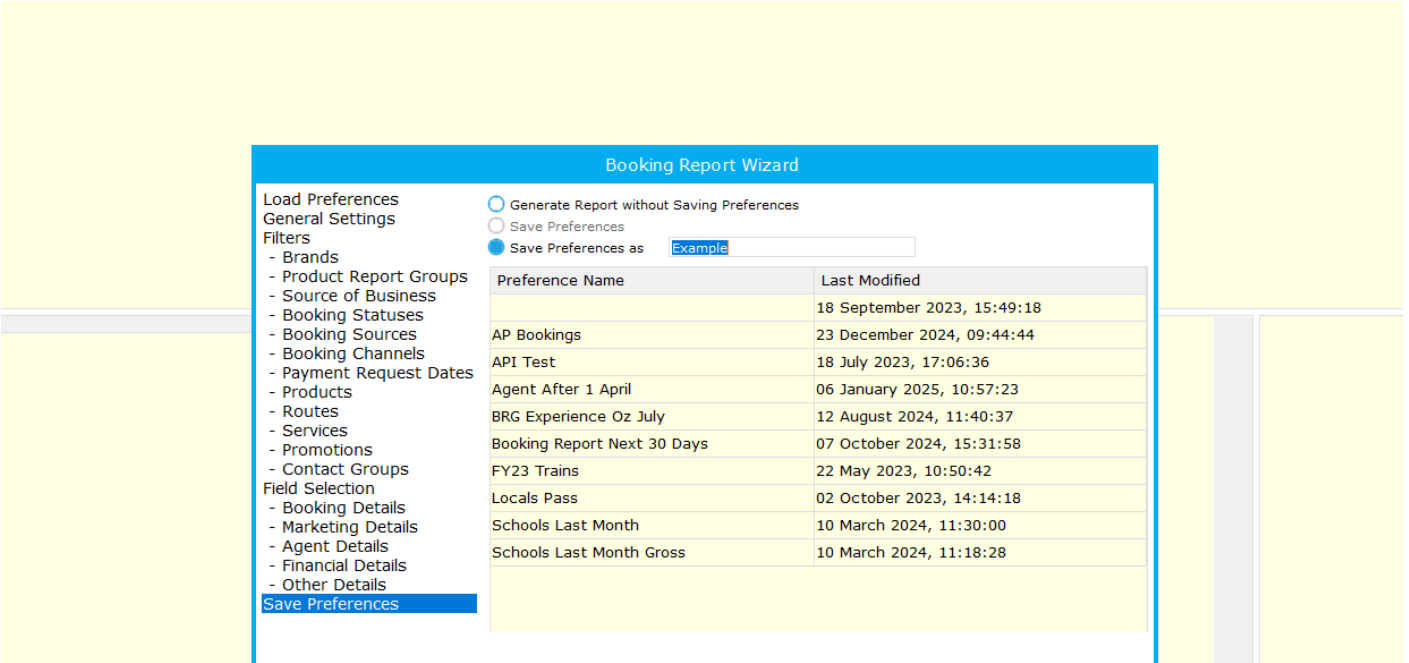
Table << Back Next >> Cancel

The next area is **Field Selection**, this is where you will choose what information you want to see from the data that is grabbed. This includes, party numbers, pax, product codes, party name, cost and so much more.



We recommend using as few of these as required to keep your data relevant.

Finally if you want to reuse this report in future you can save the report, **Save Preferences** will only be available if you loaded a saved report at the start. **Save Preferences As** allows you create a new saved report.



Hit finish and your report will be generated.

Bookings Report														
Booking Dates: 01/12/2024-31/12/2024, Use Date Type: Date of Travel, Group Or FITs: All Bookings, Sales Office: , Booked By: , Agent: WINE HOP, OCBA=Pufling Billy Railway Social Club, Product: , Include Direct Bookings, Booking Statuses=Agent Allocation;Boarded;Carrage Hire max pax adjustment;Confirmed;Confirmed - Outstanding balance;Gift Voucher;Gift Voucher redeemed;No Show;Pending GYG;Pending web payment;Quoted;Upgraded														
Row	Party Ref	Party Name	Contact Details	Party Phone#	Party Mobile Phone#	Opted In	Same Party Bookings	Booking Ref	Module	Pax	Status	Departure Status	Product Code	Product Name
1	1572862	WINE HOP				Unsubscribed	1	887790	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
2	1572871	WINE HOP				Unsubscribed	1	887799	Sightseeing	48	Boarded	Closed	XU14:15BEL-LAKS	2:15pm Bel dep to Lakeside / Single TO
3	1572872	WINE HOP				Unsubscribed	1	887800	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
4	1572875	WINE HOP				Unsubscribed	1	887803	Sightseeing	48	Boarded	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
5	1572876	WINE HOP				Unsubscribed	1	887804	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
6	1572880	WINE HOP				Unsubscribed	1	887808	Sightseeing	48	Boarded	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
7	1572883	WINE HOP				Unsubscribed	1	887811	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
8	1572884	WINE HOP				Unsubscribed	1	887812	Sightseeing	24	Boarded	Closed	XU11:00BEL-LAKS	11:10 Bel dep to Lakeside / Single TO
9	1572885	WINE HOP				Unsubscribed	1	887813	Sightseeing	48	Confirmed	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
10	1572886	WINE HOP				Unsubscribed	1	887814	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
11	1572888	WINE HOP				Unsubscribed	1	887816	Sightseeing	48	Boarded	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
12	1572890	WINE HOP				Unsubscribed	1	887818	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
13	1572893	WINE HOP				Unsubscribed	1	887821	Sightseeing	48	Boarded	Closed	XU14:15BEL-LAKS	2:15pm Bel dep to Lakeside / Single TO
14	1572894	WINE HOP				Unsubscribed	1	887822	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
15	1572896	WINE HOP				Unsubscribed	1	887824	Sightseeing	24	Boarded	Closed	XU11:00BEL-LAKS	11:10 Bel dep to Lakeside / Single TO
16	1572897	WINE HOP				Unsubscribed	1	887825	Sightseeing	48	Boarded	Closed	XU14:15BEL-LAKS	2:15pm Bel dep to Lakeside / Single TO
17	1572900	WINE HOP				Unsubscribed	1	887828	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO

From here you can double click an item in this list to be taken to the actual booking, you can also right click and export as a **.CSV** if you would like to look at this in excel.

You can traverse between the report and bookings with the tabs at the top.

Bookings Report														
Booking Dates: 01/12/2024-31/12/2024, Use Date Type: Date of Travel, Group Or FITs: All Bookings, Sales Office: , Booked By: , Agent: WINE HOP, OCBA=Pufling Billy Railway Social Club, Product: , Include Direct Bookings, Booking Statuses=Agent Allocation;Boarded;Carrage Hire max pax adjustment;Confirmed;Confirmed - Outstanding balance;Gift Voucher;Gift Voucher redeemed;No Show;Pending GYG;Pending web payment;Quoted;Upgraded														
Row	Party Ref	Party Name	Contact Details	Party Phone#	Party Mobile Phone#	Opted In	Same Party Bookings	Booking Ref	Module	Pax	Status	Departure Status	Product Code	Product Name
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8	1572884	WINE HOP				Unsubscribed	1	887812	Sightseeing	24	Boarded	Closed	XU11:00BEL-LAKS	11:10 Bel dep to Lakeside / Single TO
9	1572885	WINE HOP				Unsubscribed	1	887813	Sightseeing	48	Confirmed	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
10	1572886	WINE HOP				Unsubscribed	1	887814	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO
11	1572888	WINE HOP				Unsubscribed	1	887816	Sightseeing	48	Boarded	Closed	XU14:15LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO
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17	1572900	WINE HOP				Unsubscribed	1	887828	Sightseeing	24	Boarded	Closed	XU10:00BEL-LAKS	10:00 Bel dep to Lakeside / Single TO

Revision #1

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