
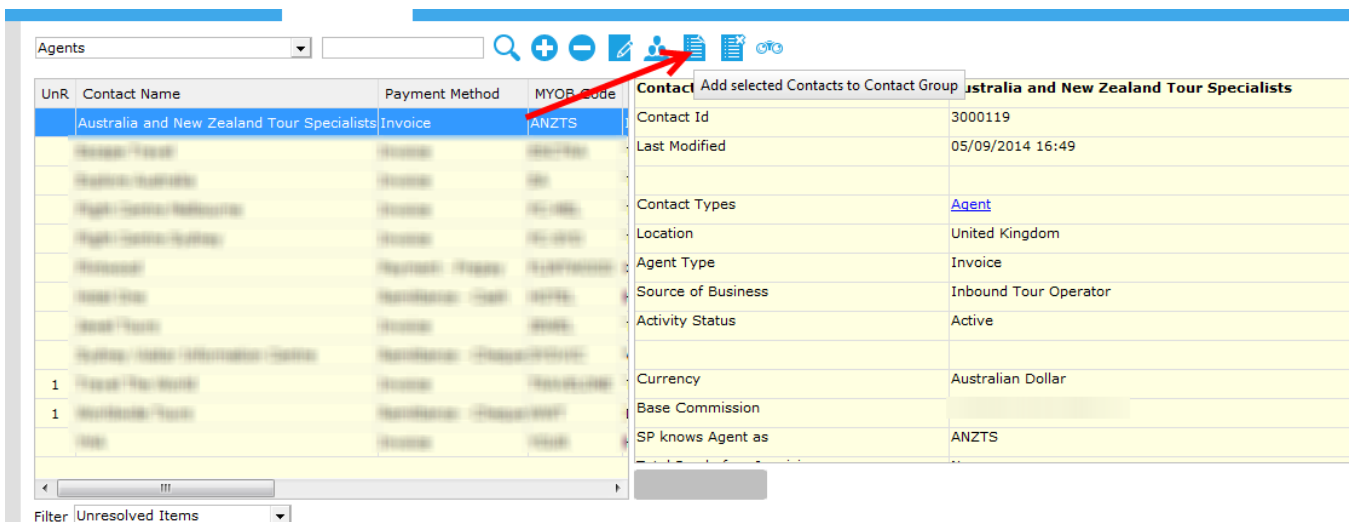


Agent Management/CRM

- [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](#)

How to: Assign or Remove Contacts/Agent to Contact Group(s)

1. Find the **Contact** you wish to allocate to a Contact group
2. Select the  icon



The screenshot shows a software interface with a table of contacts and a detailed view of a selected contact. A red arrow points to the 'X' icon in the toolbar above the table.

UnR	Contact Name	Payment Method	MYOB Code
	Australia and New Zealand Tour Specialists	Invoice	ANZTS

1
1

Filter: Unresolved Items

Contact	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

- 3.

Sel	Contact Name	Payment Method	Tencia Code	Source of Business	Product	Con
<input checked="" type="checkbox"/>	Puffing Billy	Invoice	PUFFING_BILLY	(default)		Con
<input type="checkbox"/>	Puffing Billy Operations	Payment - Prepay	PBROPS	(default)	20% Special ITOs API TI - Net Pri	Last
<input type="checkbox"/>	Puffing Billy Preservation Society	Invoice	PBPS	(default)	TO-MC 15% & LAKE 20% - Net Pri	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

filter: Unresolved Items ▼

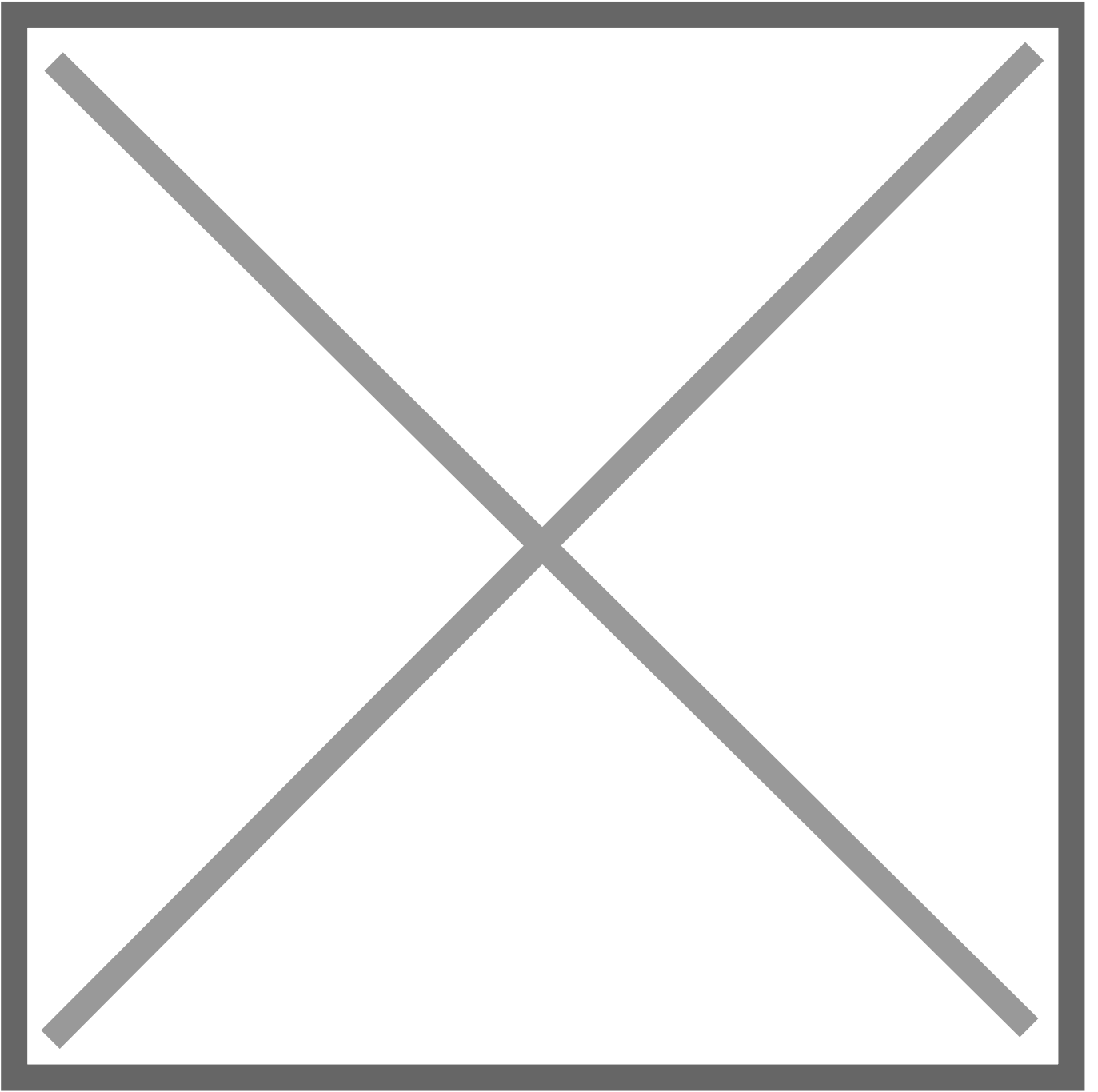
Date/Time	Subject	From	To

- 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.

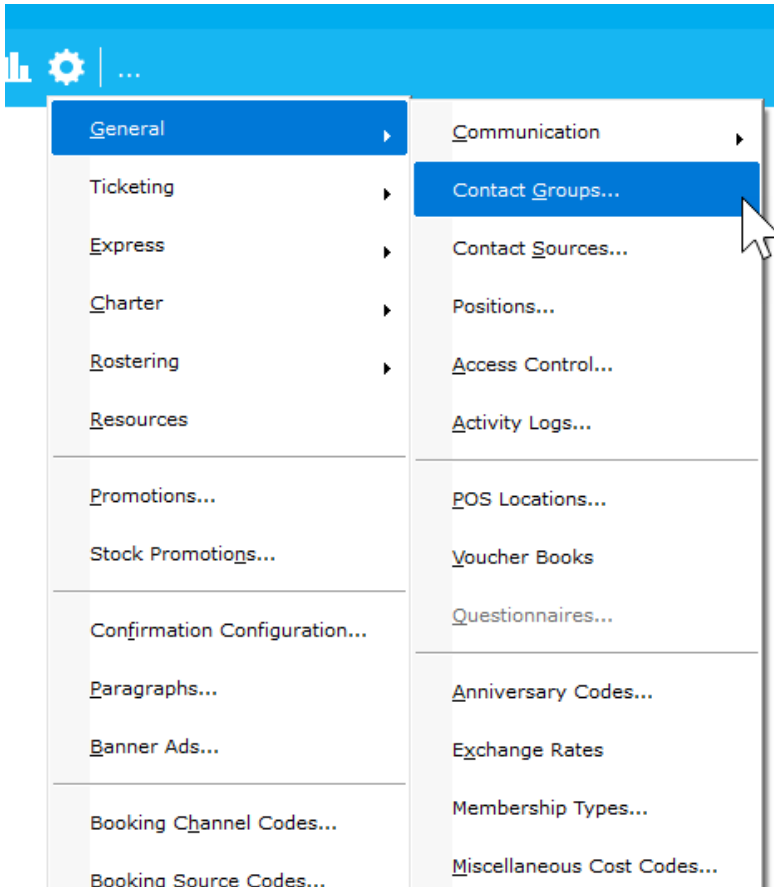
To remove a contact group from a contact

- 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

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:

Contacts

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 Remo... | BookStack](#)

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

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

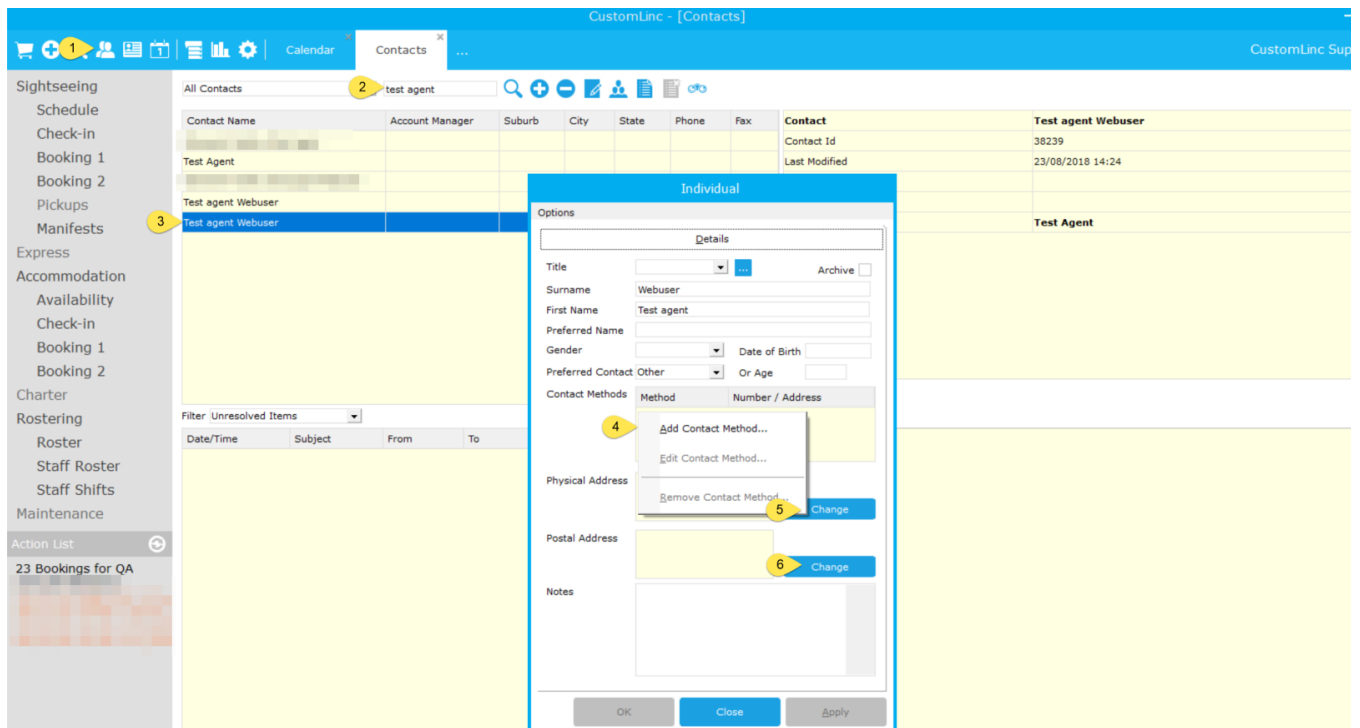
Organisation

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

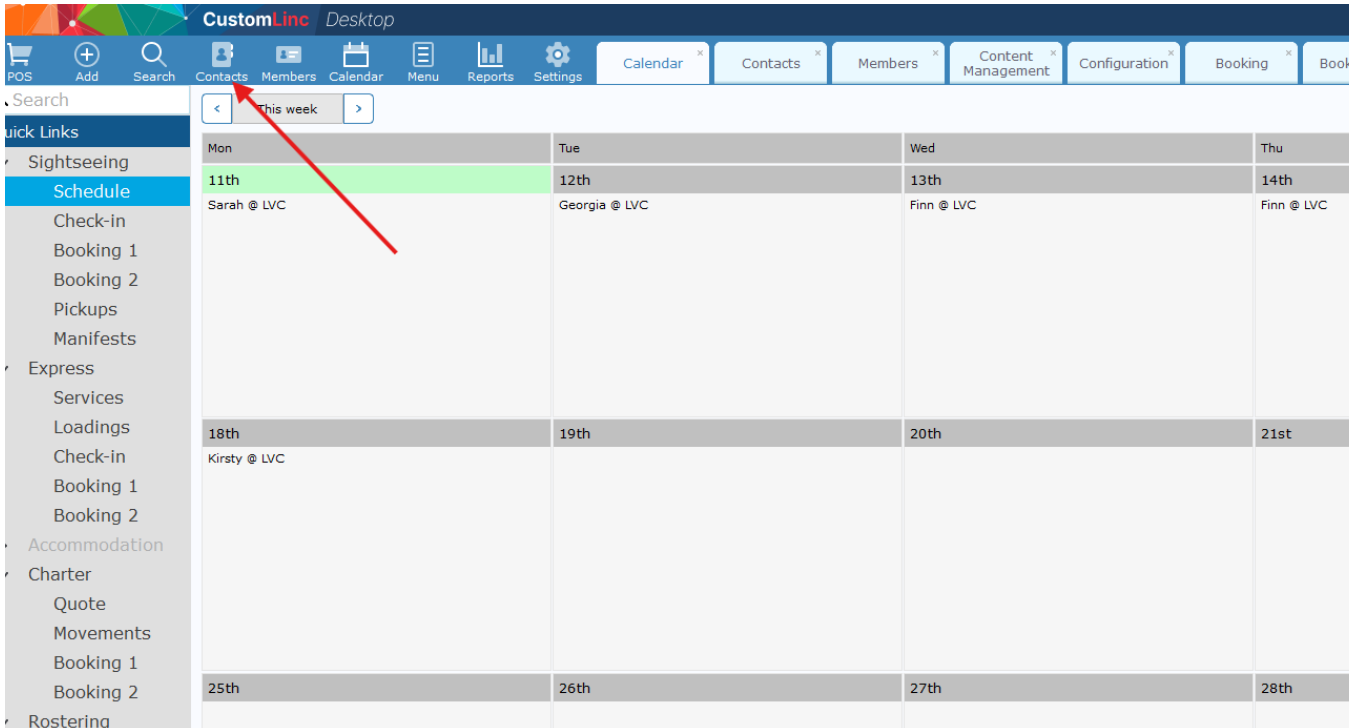
Existing Contact Methods will appear on the right of the screen when the Contact is selected as at 1 below as an example.

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

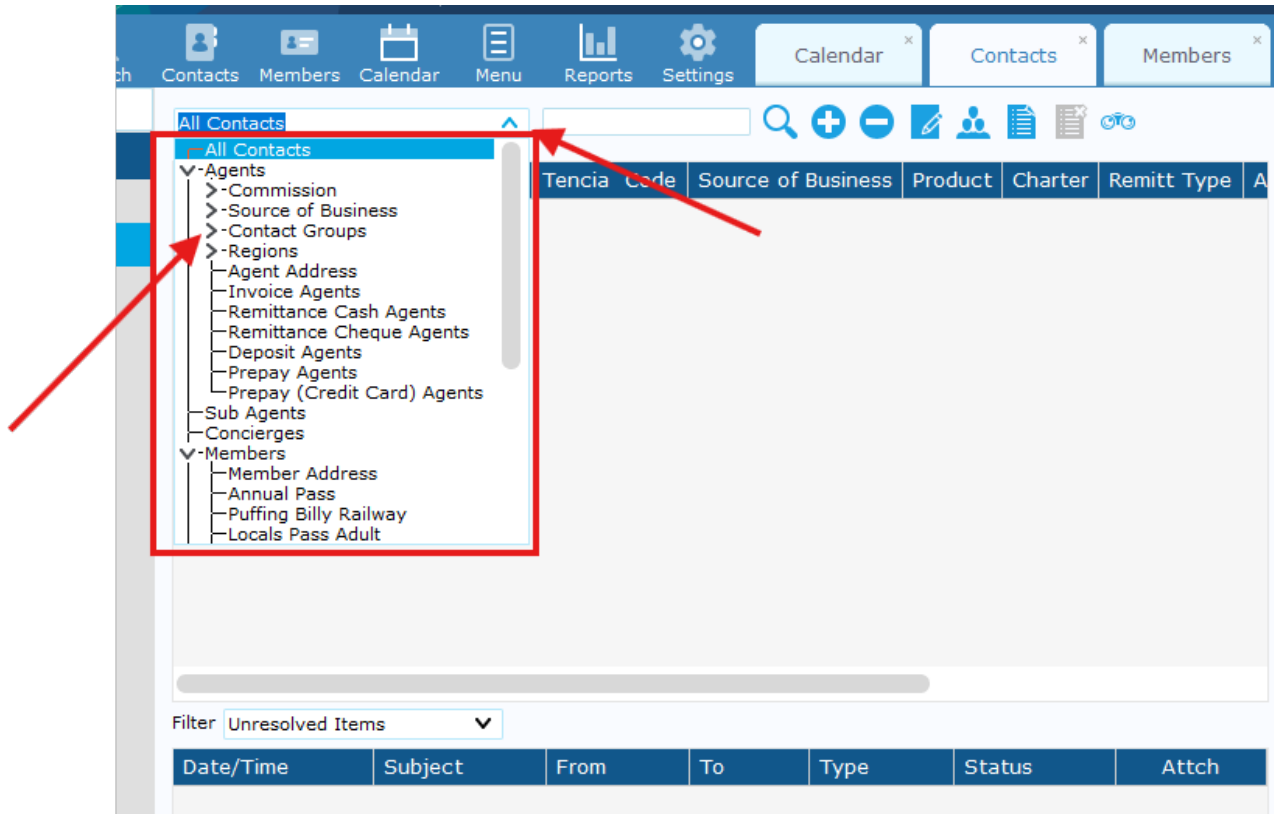
1. Go to **Contacts**



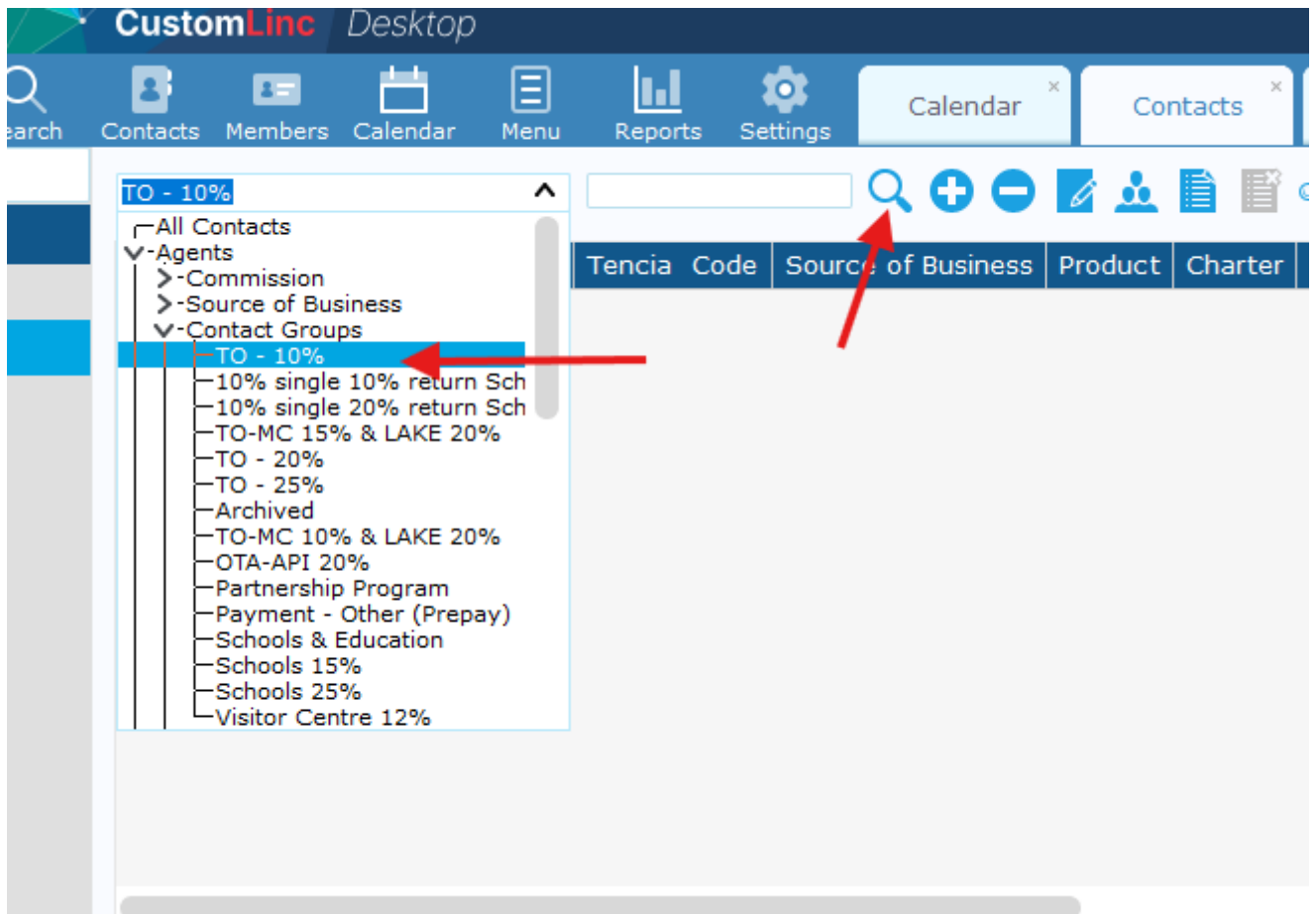
The screenshot shows the CustomLine Desktop interface. The top navigation bar includes tabs for POS, Add, Search, Contacts, Members, Calendar, Menu, Reports, Settings, and several open tabs: Calendar, Contacts, Members, Content Management, Configuration, Booking, and Book. A red arrow points to the 'Contacts' tab. Below the navigation bar is a search bar and a 'Quick Links' sidebar. The main area displays a calendar grid for 'This week' with columns for Mon, Tue, Wed, and Thu. The grid shows dates 11th, 12th, 13th, 14th, 18th, 19th, 20th, 21st, 25th, 26th, 27th, and 28th. Contact names are listed under specific dates: Sarah @ LVC on the 11th, Georgia @ LVC on the 12th, Finn @ LVC on the 13th, and Kirsty @ LVC on the 18th.

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	Contact Types
15	AMIG Travel	Payment	Physical Address
2	APSE TOURS PTY LTD	Payment	Contact Groups
39	Around & About Tours	Payment	Tax Number
	Asia Vacation Group Pty Ltd	Payment	
183	AU VIP Trips T/S AU VIP TOUR	Payment	
	Aus Start Traveling Pty Ltd	Payment	

Filter: Unresolved Items

Date/Time	Subject	From	To	Attach

- Configure As >
- Assign To >
- Select >
- Agents >
- User >
- Supplier >
- Link Concierge to Agent...
- Brochure Request >
- Email/SMS List >
- Label Run >
- User Logon Details
- Export >
- Properties...

- CSV file
- 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** - 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**

The screenshot shows the 'Organisation' contact details form in CustomLinc. The form is titled 'Contact Details' and is divided into two main sections: 'Contact Details' and 'Address/Phone/Fax/Email/Web'.

Contact Details Section:

- Code: DTC
- Name: Dylan Test
- Country: Australia
- State: VIC
- Tax Number: [Empty] Tax Reg?
- 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:

Address/Phone/Fax/Email/Web Section:

- Table with columns: Type, Address
- Buttons: Add, Edit, Remove
- Table with columns: Type, Phone / Fax / Email / Web
- Buttons: Add, Edit, Remove

Bottom Buttons: 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: [] Consolidate

Source of Business *: (default)

Report Category: []

Licence No.:

Agent Contracts

Booking From	Booking To	Travelling From	Travelling To	Description	Type	Net
--------------	------------	-----------------	---------------	-------------	------	-----

Integration

API Key: [] API Enabled

Send details to...

Vendor Name:

CustomLinc 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**.

All Contacts

Contact	Name	Account Manager	Suburb	City	State	Phone	Fax
Dylan Test							

Filter: Unresolved Items

Date/Time	Subject	From	To	Type	Status	Attach
-----------	---------	------	----	------	--------	--------

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: DTC

Total Pax before Invoicing: No

Organisation

Contact Details

Code	<input type="text" value="DTC"/>
Name	<input type="text" value="Dylan Test"/>
Country	<input type="text" value="Australia"/> ▼
State	<input type="text" value="VIC"/> ▼
Tax Number	<input type="text"/> <input checked="" type="checkbox"/> Tax Reg?
Bank	<input type="text"/>
Bank and Branch	<input type="text"/>
Account Number	<input type="text"/>
Swift Code	<input type="text"/>
Account Name	<input type="text"/>
FX Account Number	<input type="text"/>
Parent Organisation	<input type="text"/>
Primary Acct Mgr	<input type="text"/> ▼
Secondary Acct Mgr	<input type="text"/> ▼
Tertiary Acct Mgr	<input type="text"/> ▼
Source	<input type="text"/> ▼
Archived	<input type="checkbox"/> <input type="text"/>

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.

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
BP knows Agent as	DTC
Total Pax before Invoicing	No

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 ▼ Consolidate

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

Vendor Name

CustomLinc Network ▼

Split Payments

Send agent confirmation (External Channels)

Send customer confirmation (External Channels)

Booking Defaults

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.

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. Finally go to brands and make sure Puffing Billy is ticked for the agent. > Hit apply and Close



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

Can book Product from these Brands	
Sel	Brand
<input checked="" type="checkbox"/>	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