
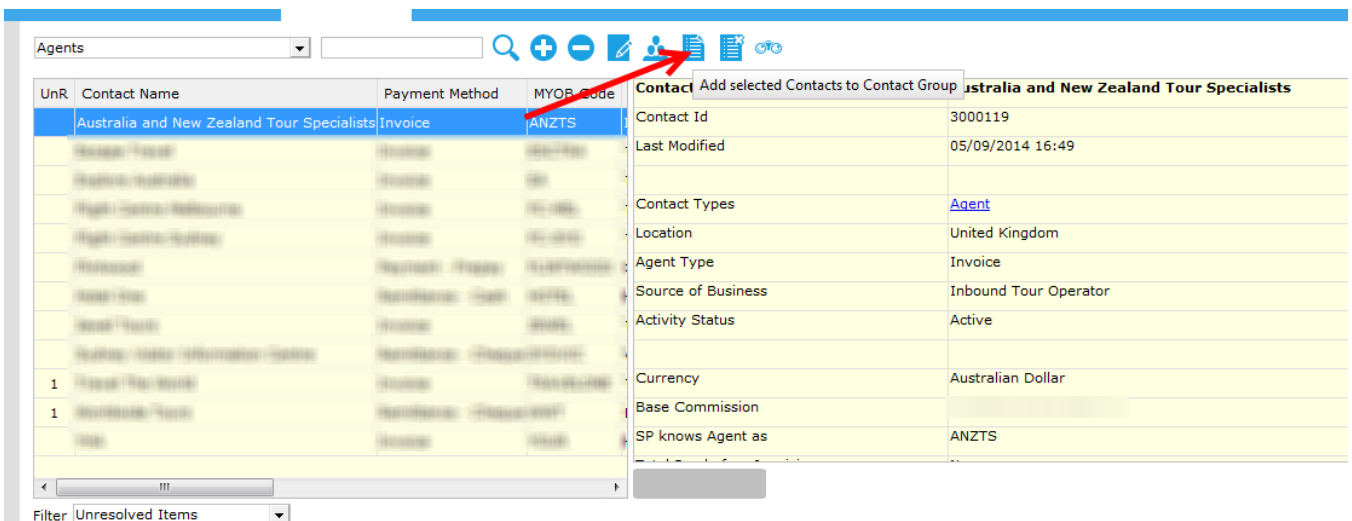


# Agent Management/CRM

- [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



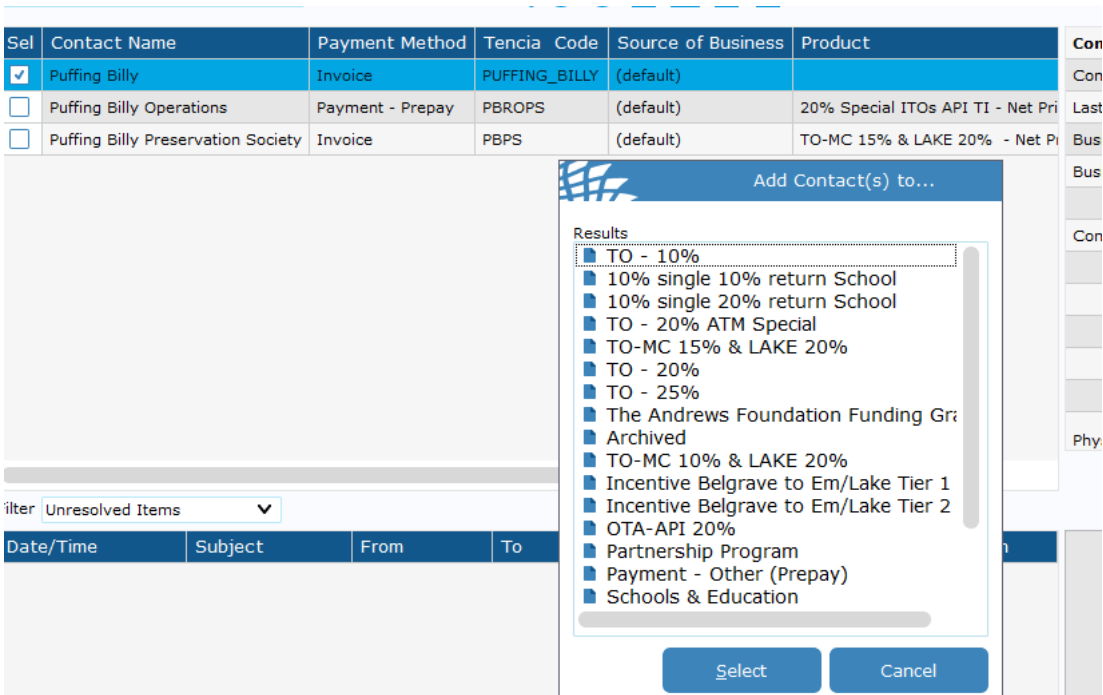
The screenshot shows a software interface with a table of contacts and a detailed view of a selected contact. A red arrow points to the 'X' icon in the top toolbar, which is used to add selected contacts to a contact group.

UnR	Contact Name	Payment Method	MYOB Code
	Australia and New Zealand Tour Specialists	Invoice	ANZTS
	...	...	...
1	...	...	...
1	...	...	...

Contact: 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.



The screenshot shows a software interface with a table of contacts and a dialog box for adding contacts to a group. The dialog box is titled 'Add Contact(s) to...' and displays a list of results.

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

**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

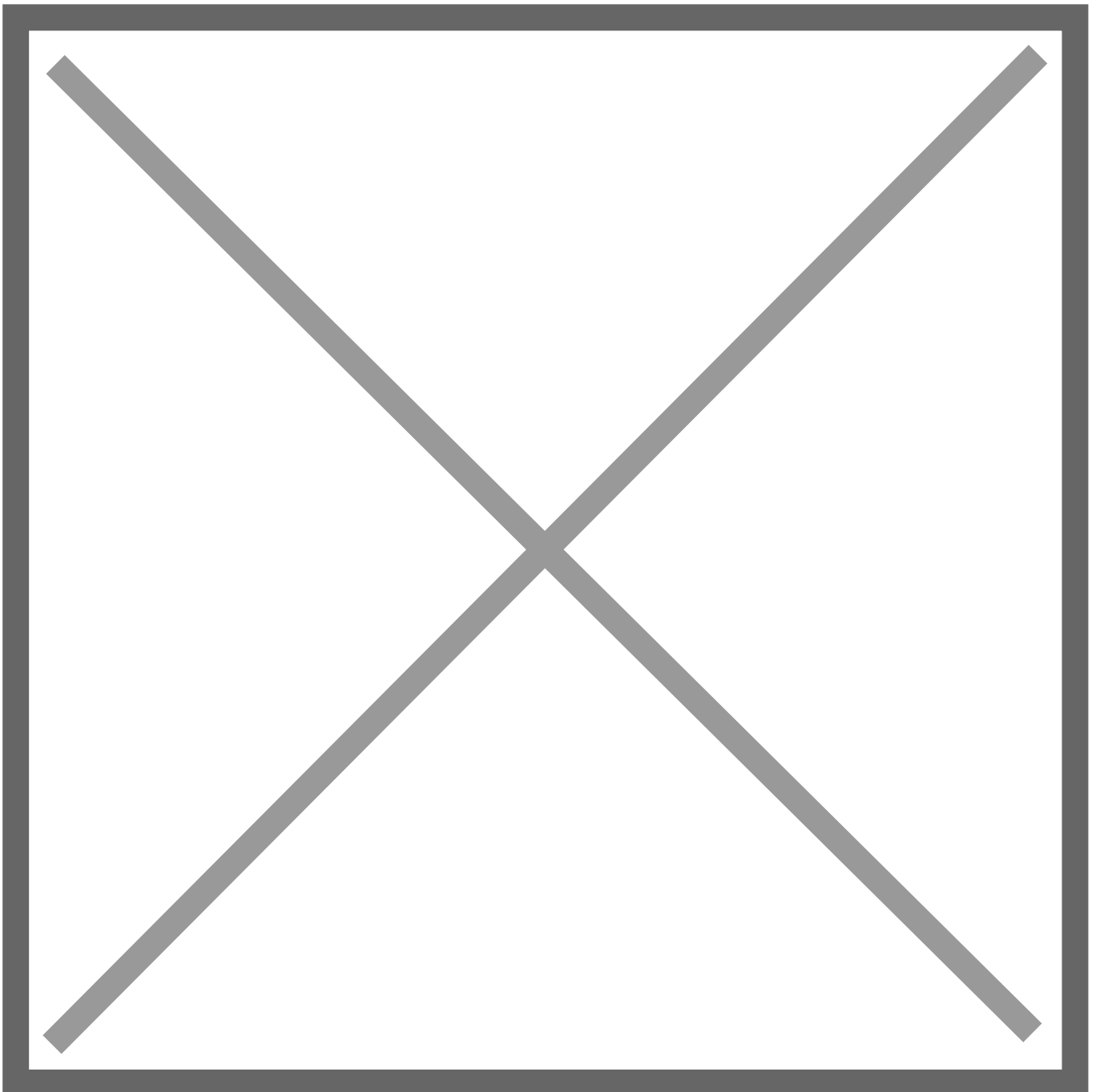
Buttons: Select, Cancel

- 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

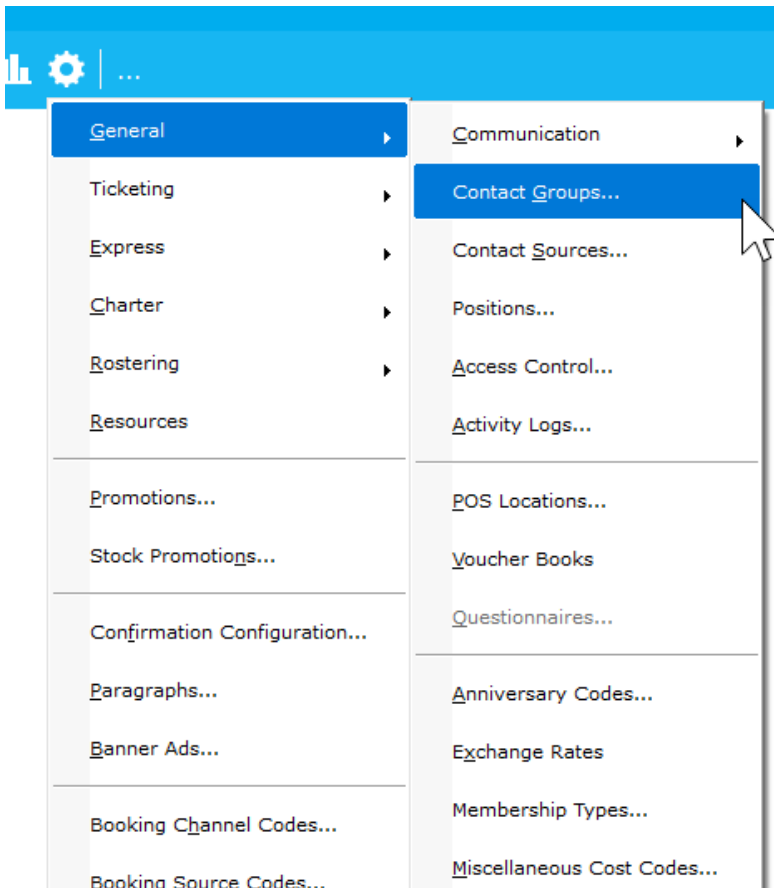
- Right click on the Contact Group you wish to remove
- Select Delete





# 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%
<b>36</b>	<b>ANDREWS</b>	<b>The And</b>
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 Remove...](#) | [BookStack](#)

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

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

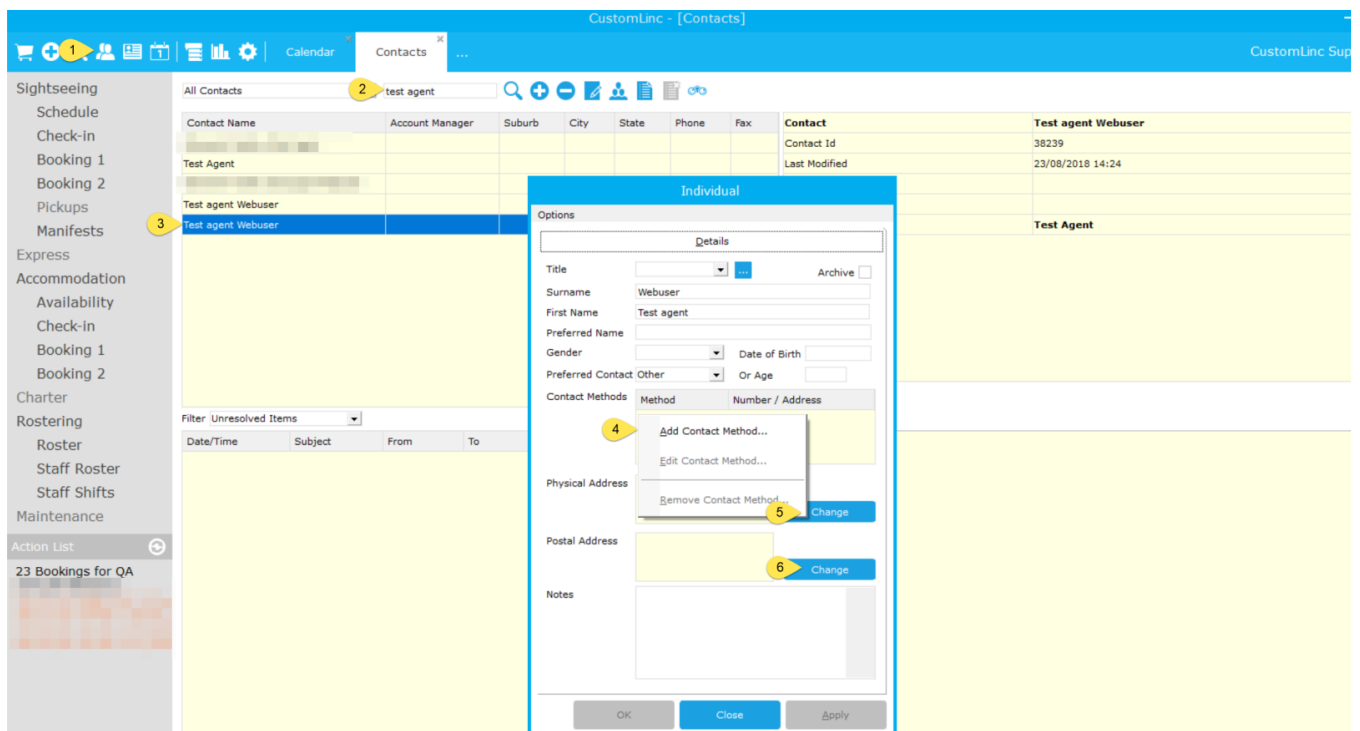
## Organisation

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

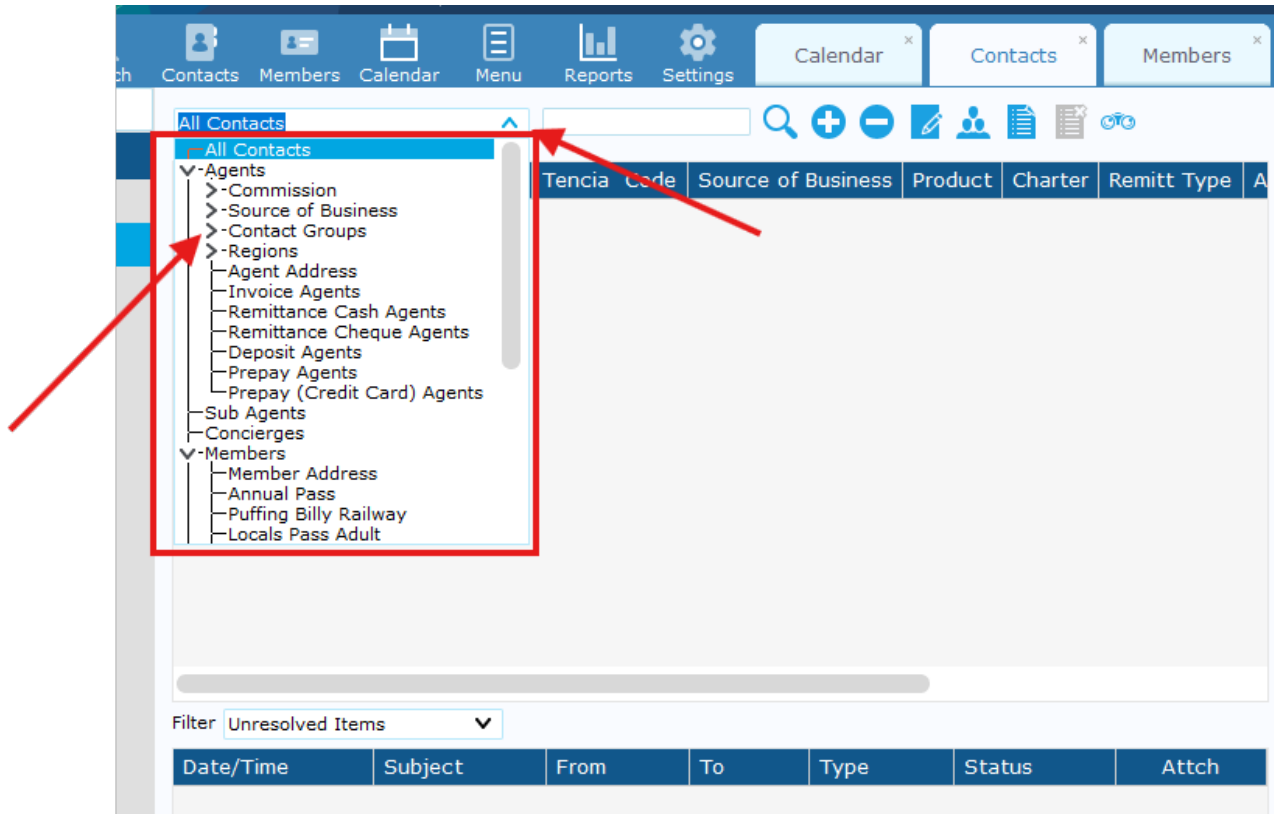
## 1. Go to **Contacts**

The screenshot shows the CustomLinc Desktop interface. The top navigation bar includes tabs for Calendar, Contacts, Members, Content Management, Configuration, and Booking. The 'Contacts' tab is selected. A red arrow points to the 'Contacts' tab. The main area displays a calendar grid for the week of the 11th to 14th. The grid shows the following contacts:

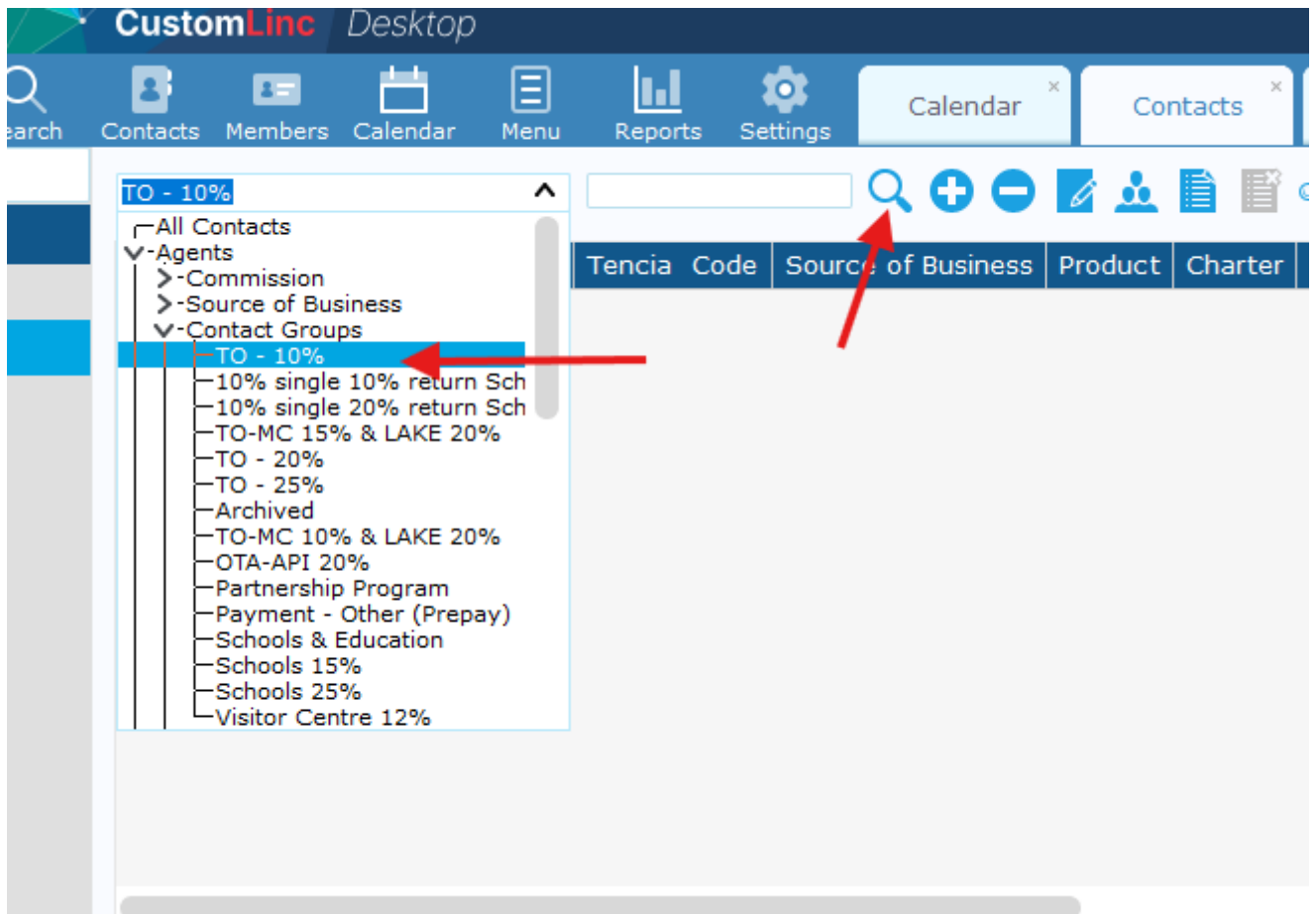
Mon	Tue	Wed	Thu
11th Sarah @ LVC	12th Georgia @ LVC	13th Finn @ LVC	14th Finn @ LVC
18th Kirsty @ LVC	19th	20th	21st
25th	26th	27th	28th

## 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 Stay 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 'Organisation' and 'Contact Details'. It contains various input fields for contact information, including Code, Name, Country, State, Tax Number, Bank, and Account Number. There are also two tables for adding additional information: one for 'Address' and one for 'Phone / Fax / Email / Web'. The 'Address' table has columns for 'Type' and 'Address'. The 'Phone / Fax / Email / Web' table has columns for 'Type' and 'Phone / Fax / Email / Web'. At the bottom of the form, there are buttons for 'Merge', 'Next >>', 'OK', 'Cancel', and 'Apply'.

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"/>

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

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

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**.

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						

<b>Contact</b>	<b>Dylan Test</b>
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  and

Travelling between  and

Agent Type   Net Prices

Price Schedule   Commission includes GST  
 Enable Yield Management

Notes

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