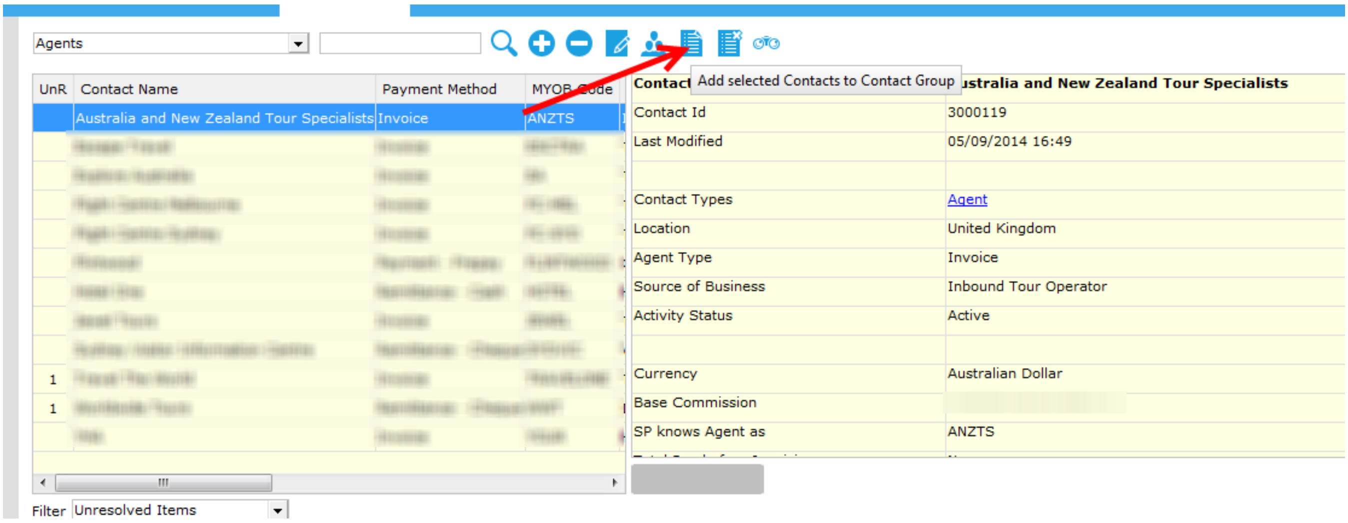
Agent Management/CRM

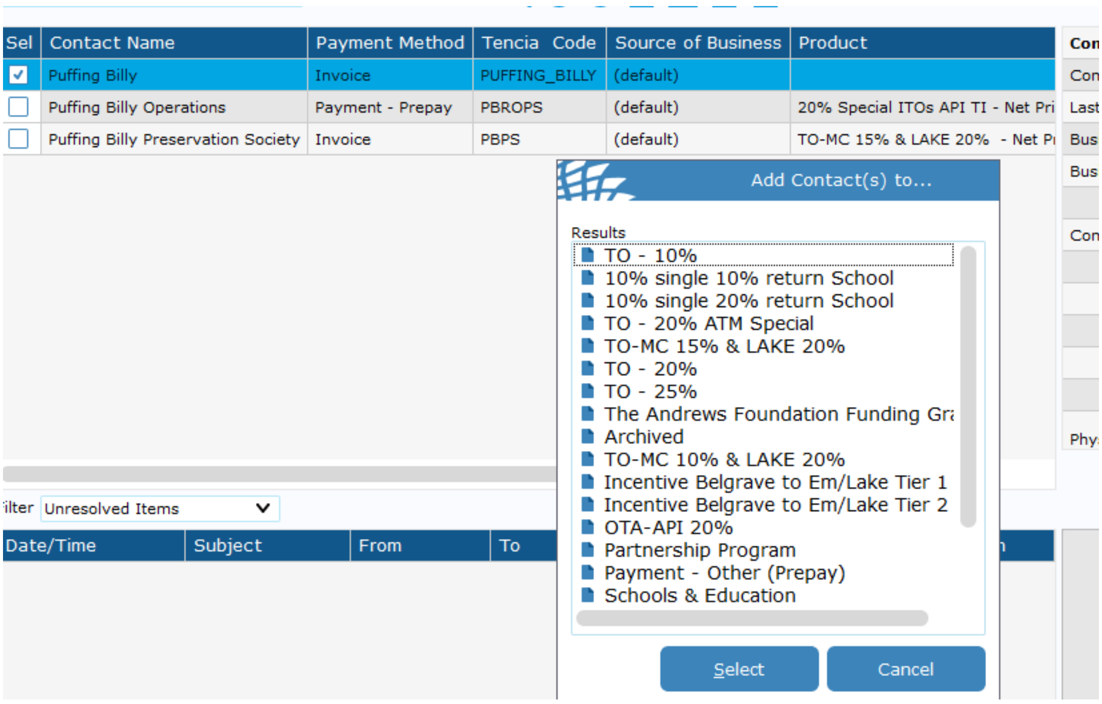
- [How to: Assign or Remove Contacts/Agent to Contact Group(s)]
- [How to: Create or Remove a Contact Group]
- [How to: Add Contact details to a contact (Agent).]
- [How to: Export a list of emails from a Contact Group]
- [How to: Create a New Agent in CustomLinc]

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



3.

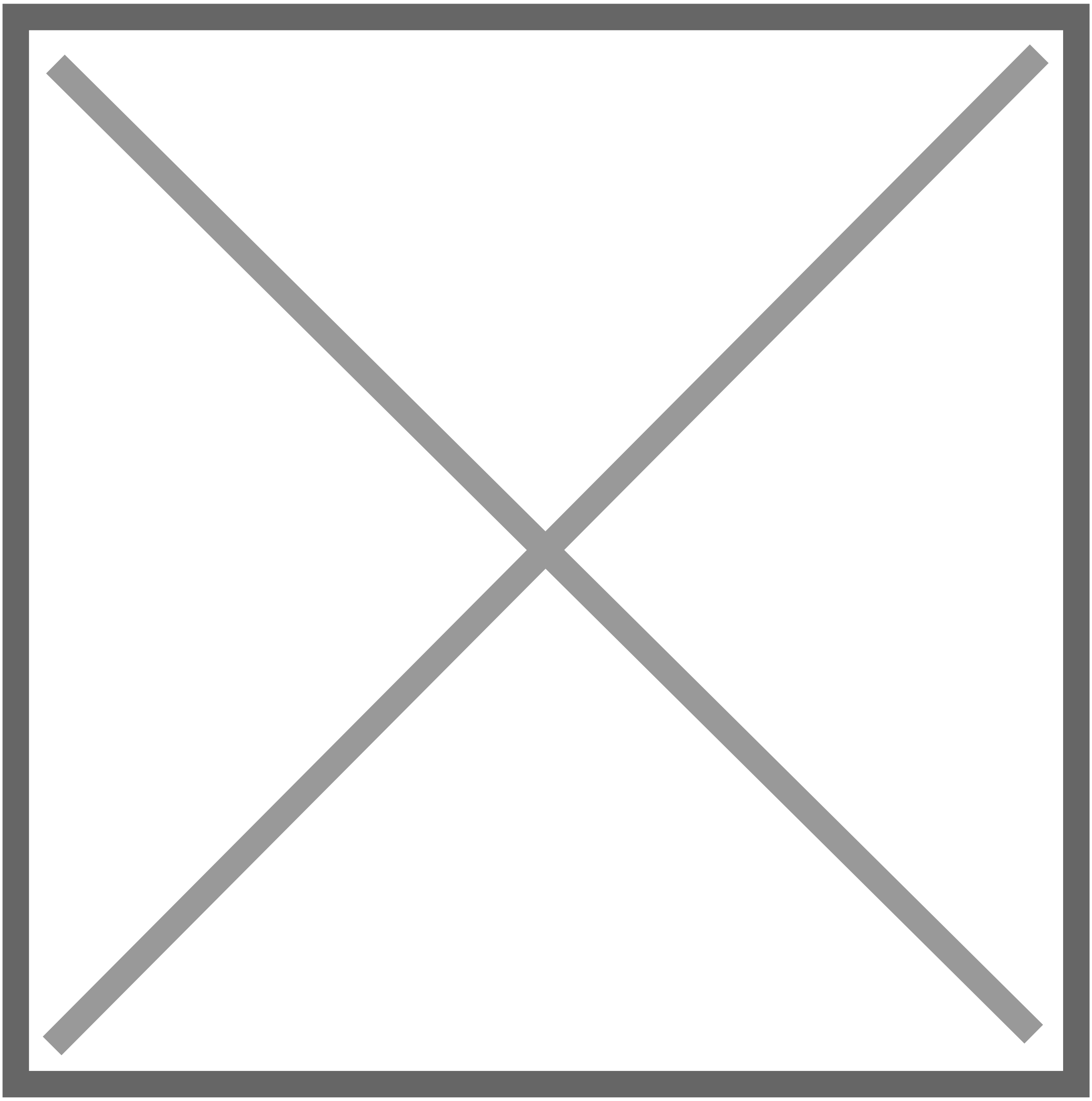


- This will pop up the list of Contact Groups that can be allocated, double click on the one you wish to add
- Repeat until you have added all the Contact Groups you wish to.

> 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.

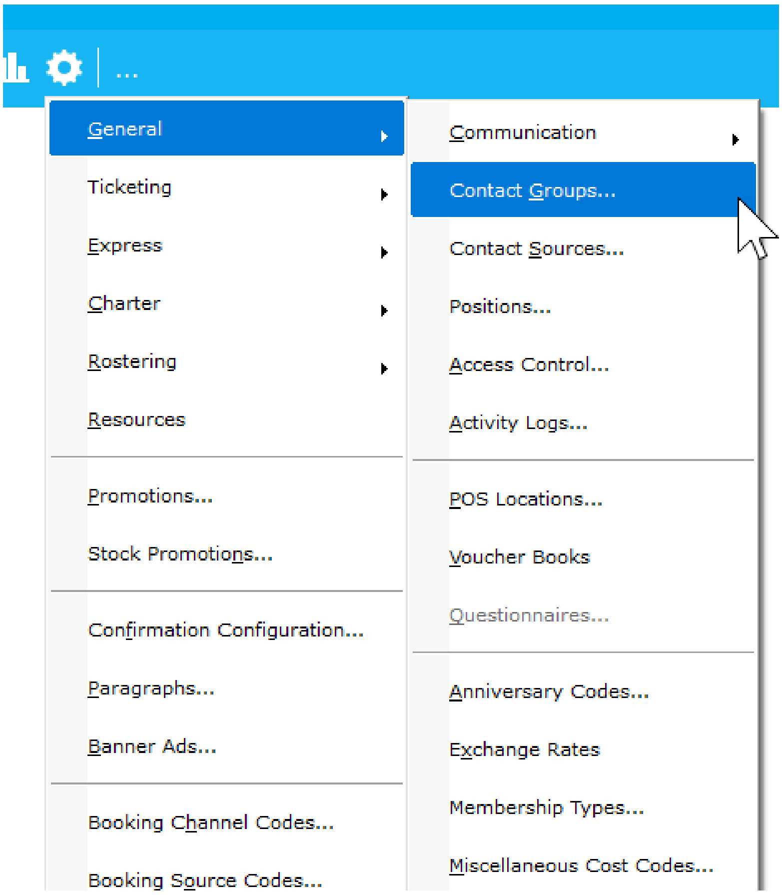
To remove a contact group from a contact

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

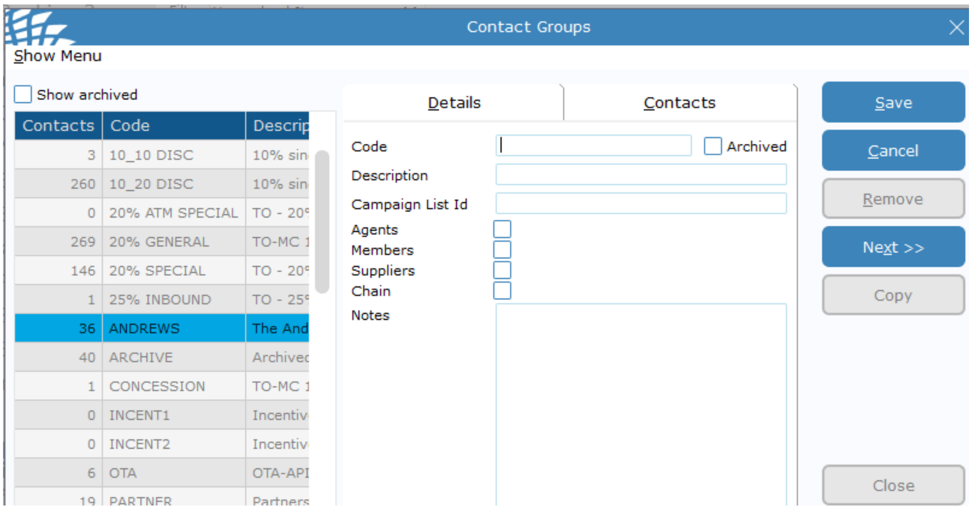


How to: Create or Remove a Contact Group

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



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



You can also edit existing templates by selecting - You cannot ad 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

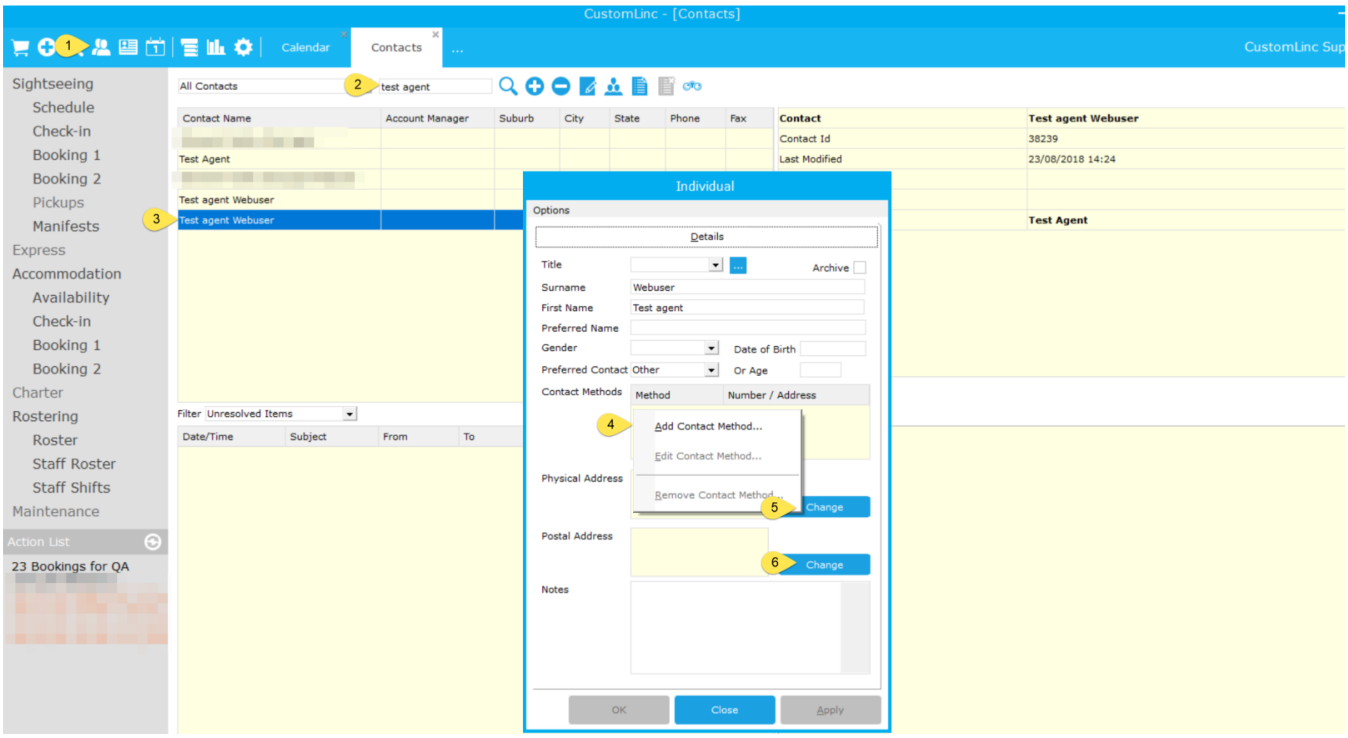
Organisation

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

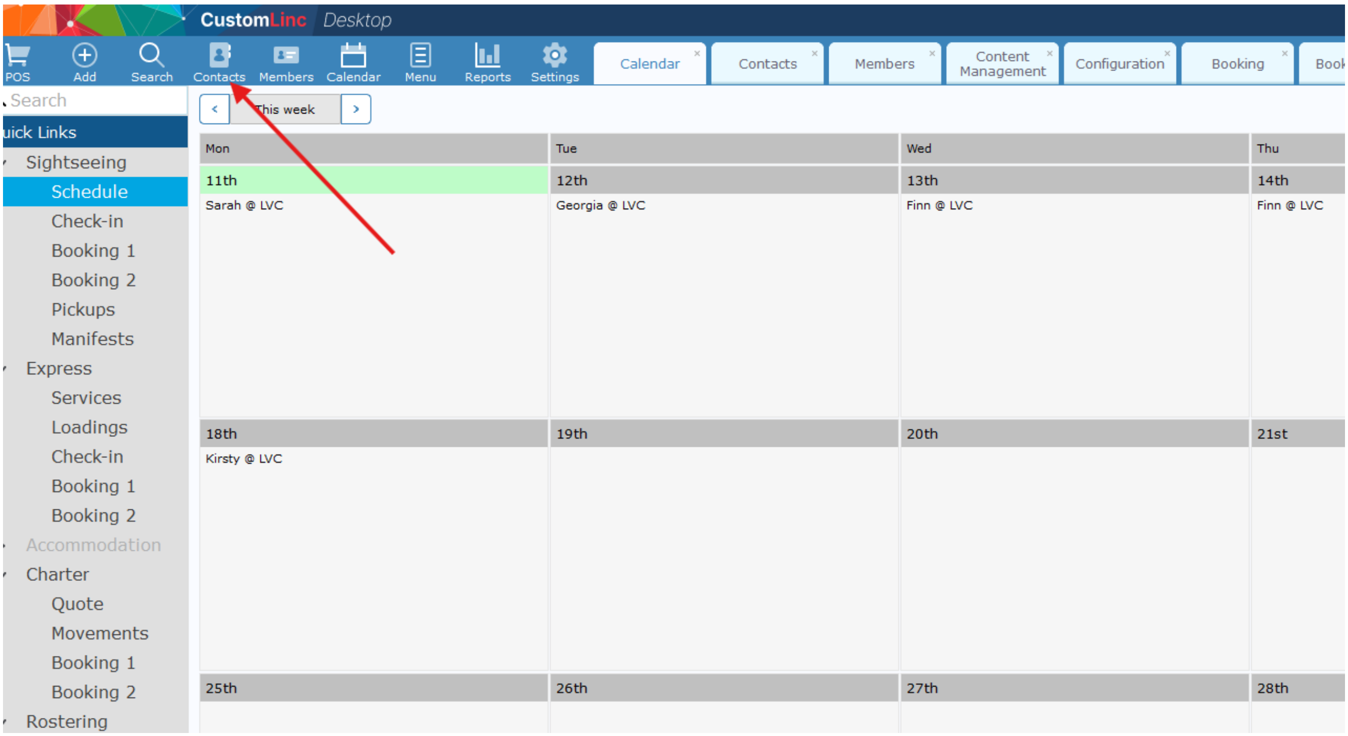
Existing Contact Methods will appear on the right of the screen when the Contact is selected as at 1 below as an example.

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

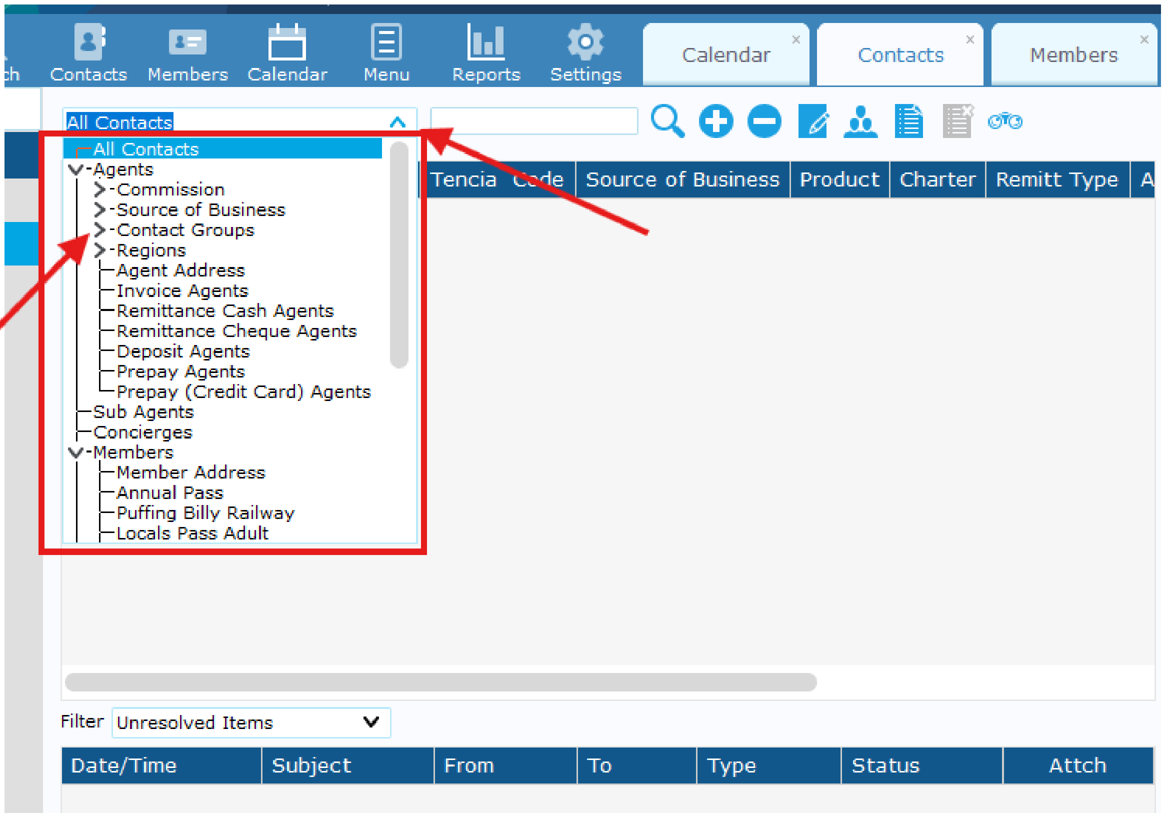
Changing_existing_Contact_Methods_on_a_Contact.png

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

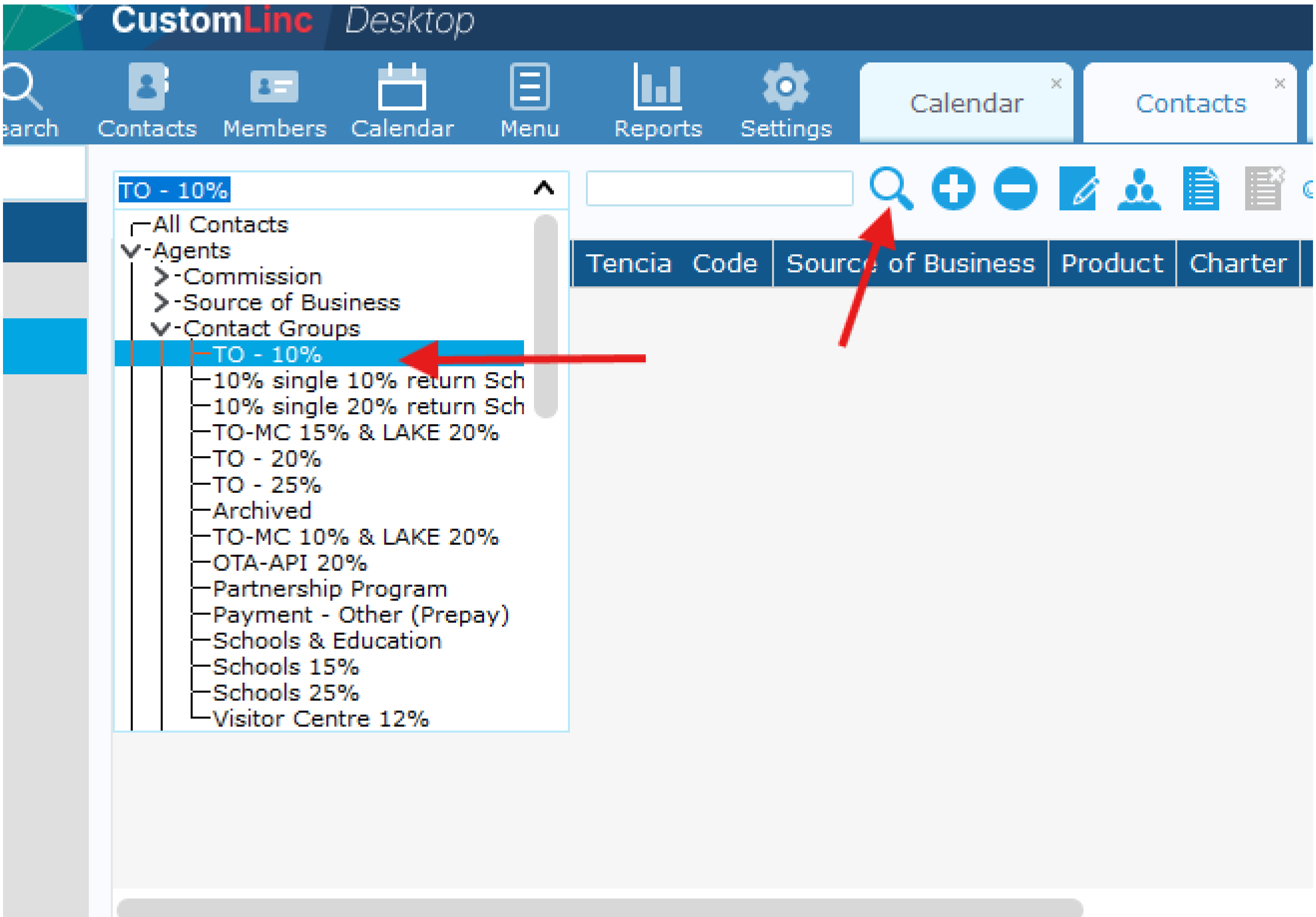
1. Go to **Contacts**



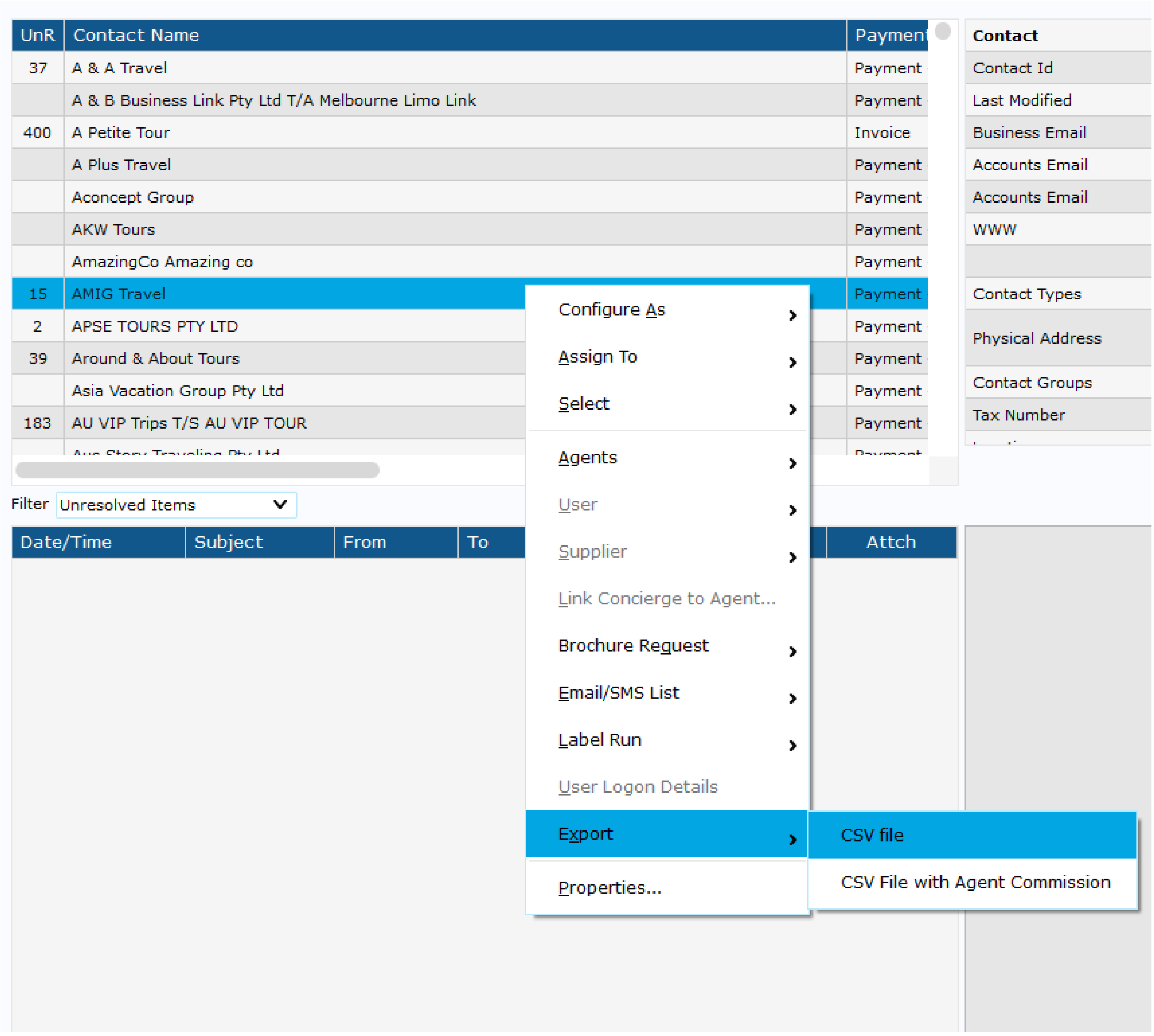
2. Select the Contacts drop down to search for a contact filter.
   - From here you can click the arrows to expand the filters, the following are examples.
     - **Contact Groups** are managed on a per agent basis - an Agent (contact) can have **multiple Contact Groups** associated.
     - **Commission** 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



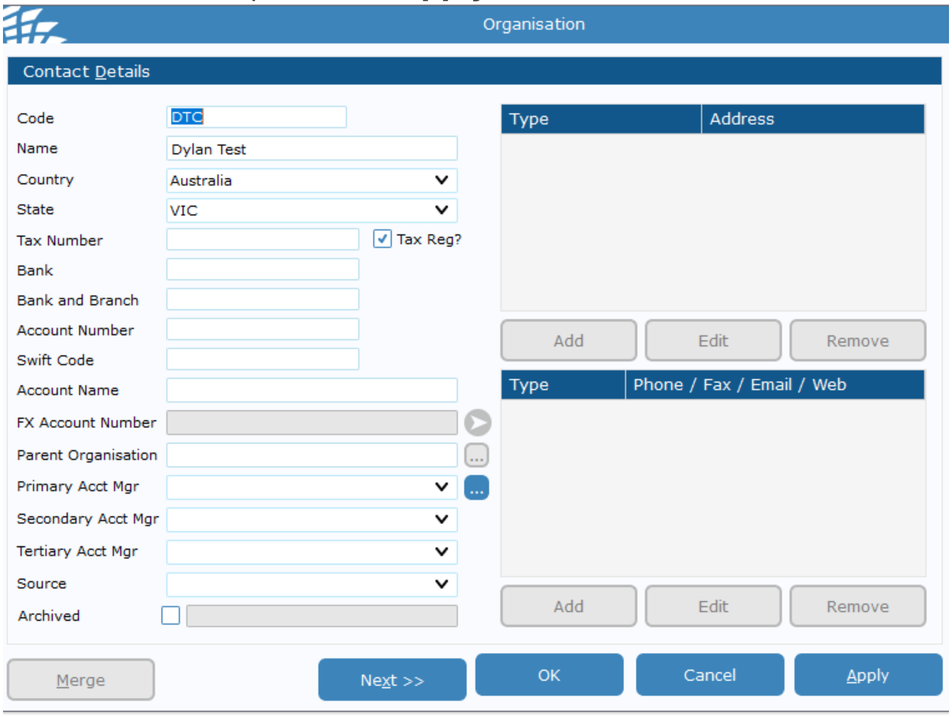
5. It will ask you to select a save locations, then it should automatically open up.

   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.

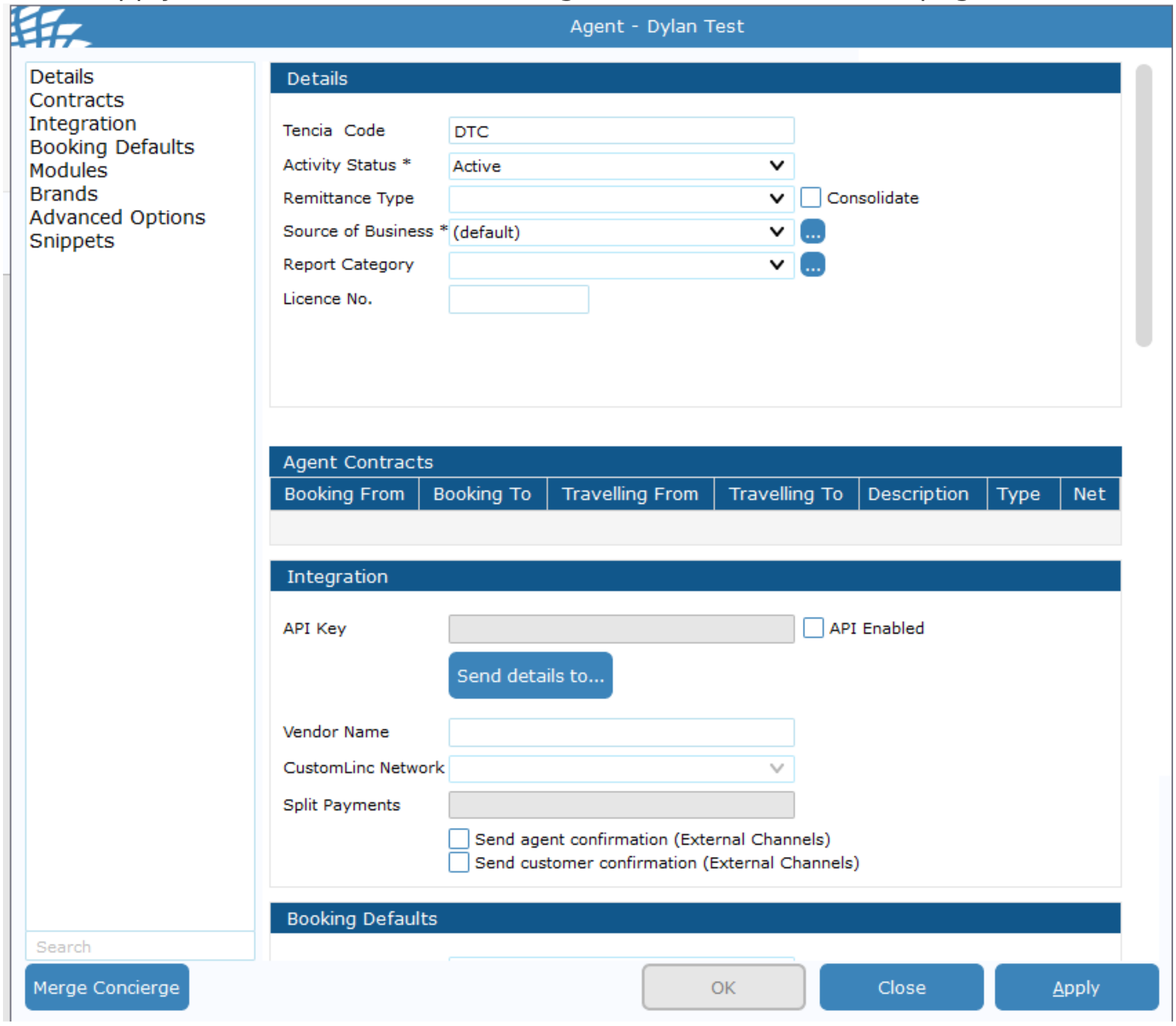
How to: Create a New Agent in CustomLinc

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**

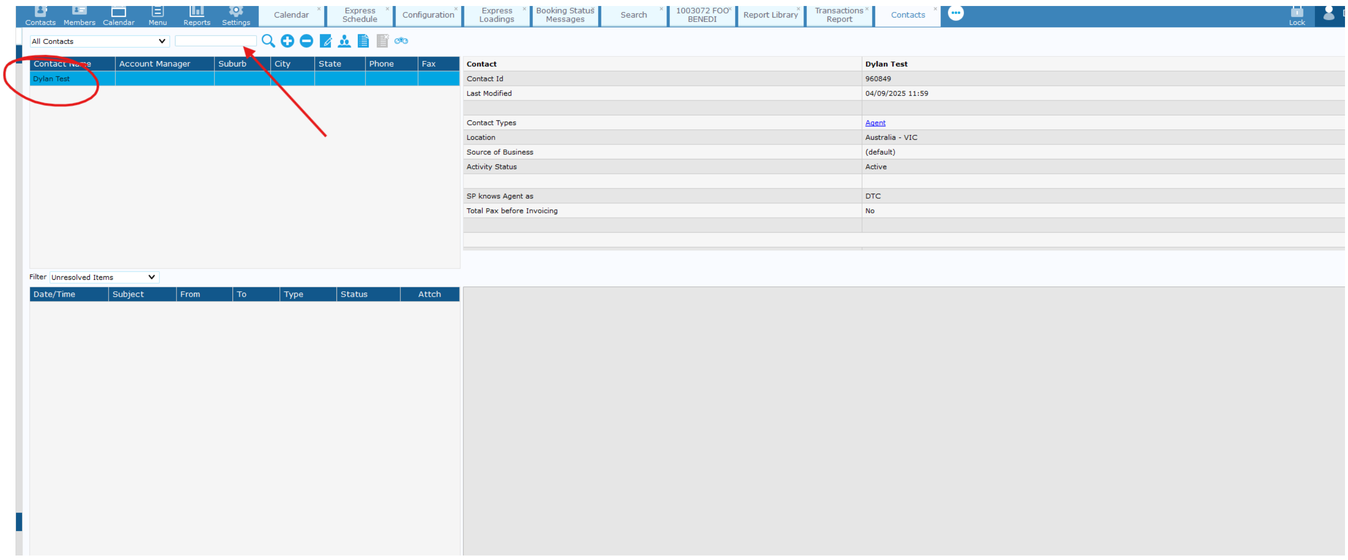


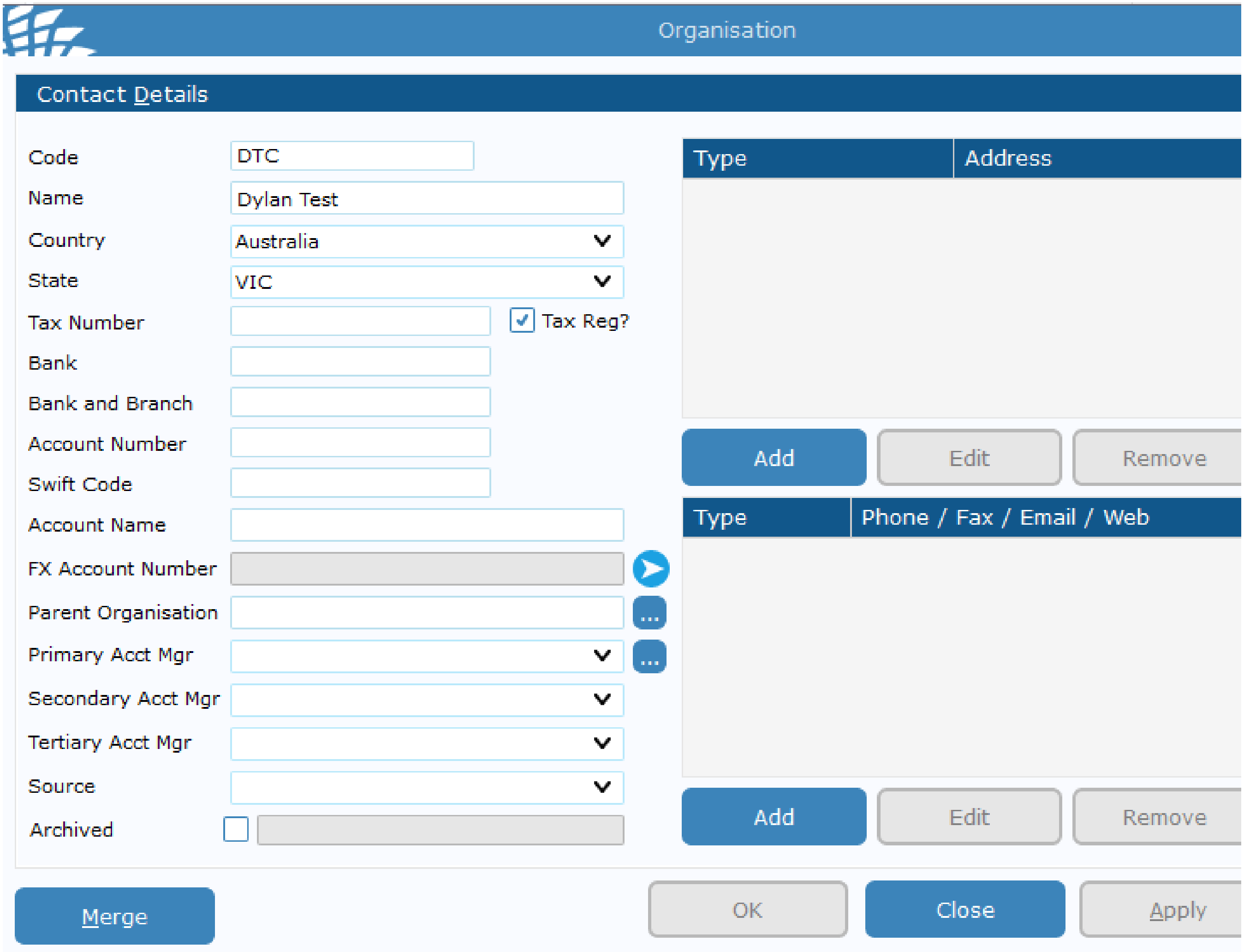
3. Select "**Agent**" > Click **Okay**

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

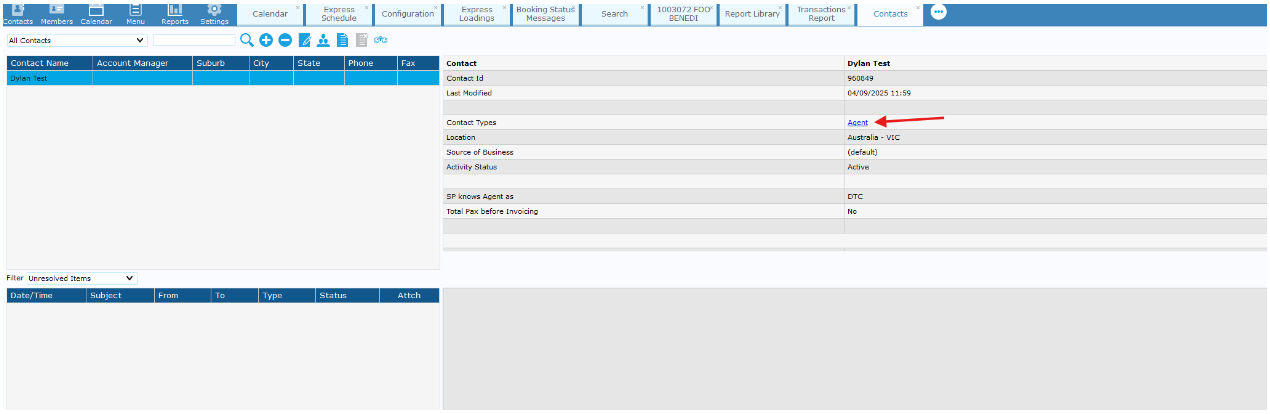


5. You should see the user on the left-hand side - **double click** and fill in contact details such as **address and email contact.**

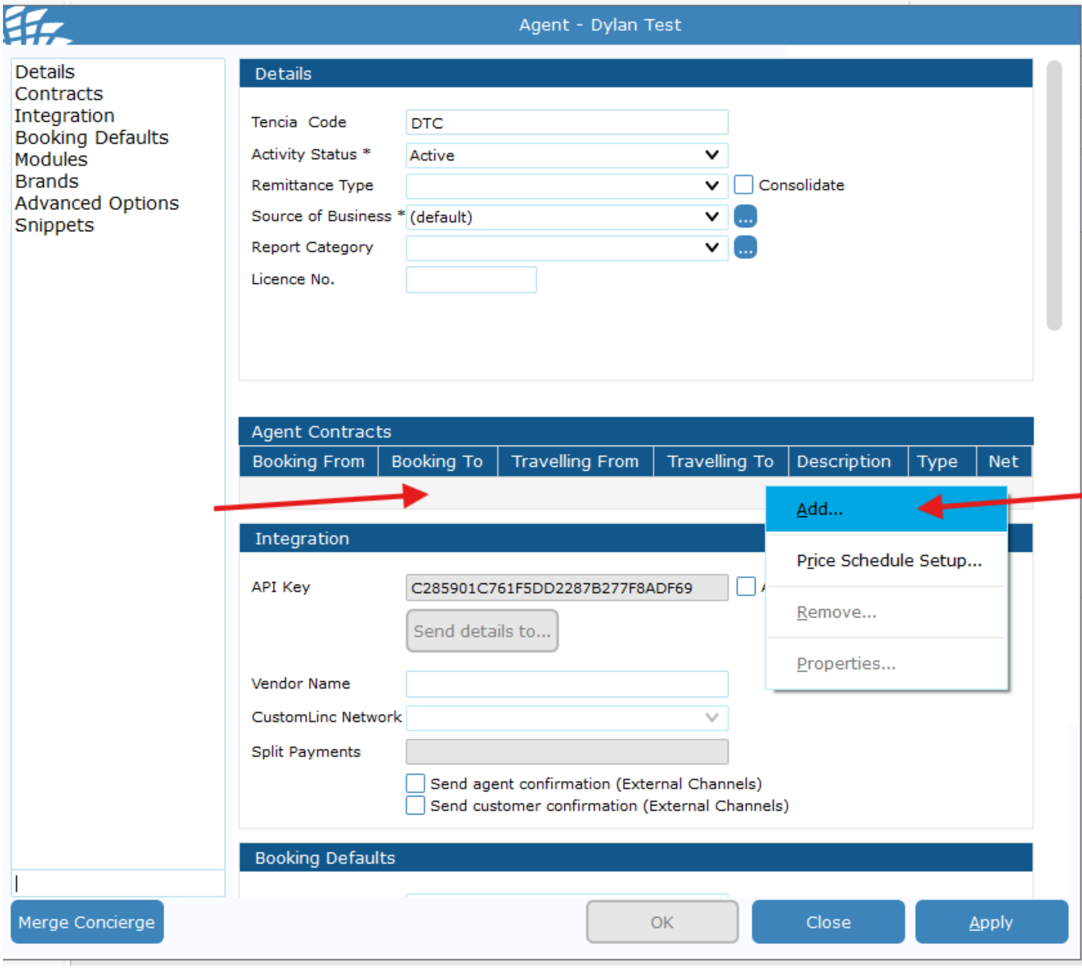




6. **Apply** & **close** this window > **Double Click "Agent"** in the contact type tab.

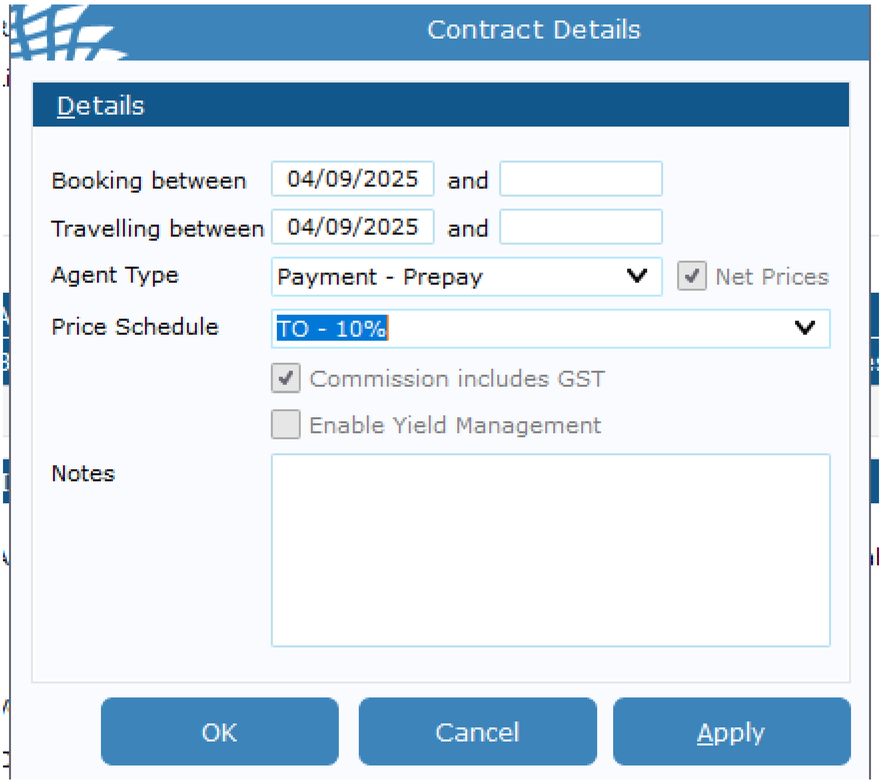


7. Go to the **contracts** area> **Right click** the grey space > Click **Add**

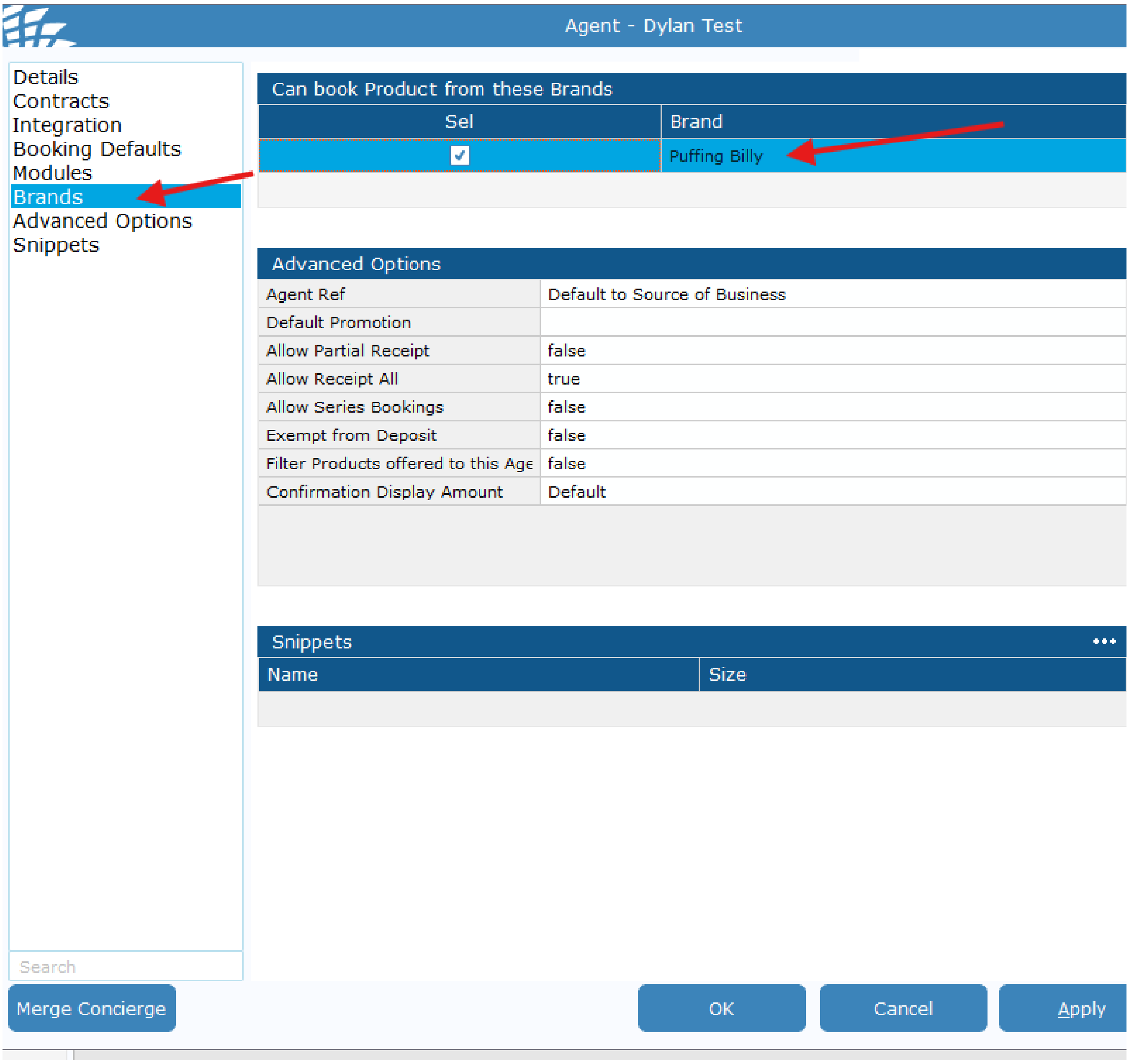


8. Fill in details:
    - Booking Between - *Usually set day after request to prevent any issues with any bookings made that day*;
    - Travelling between *Usually set day after request to prevent any issues with any bookings made that day* ;
    - **Agent type** is the payment process the agent uses (**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.



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


Agent - Dylan Test
Details
Contracts
Integration
Booking Defaults
Modules
Brands
Advanced Options
Snippets
Search
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
Merge Concierge
OK
Cancel
Apply