

Creating a New User / CustomLinc

This procedure details the steps required to add a new user to the CustomLinc system. This will typically occur when a new employee commences with the organisation. Before account set up can take place an approved new user request must be submitted via the IT helpdesk.

The CustomLinc user set up process is divided into two parts, adding an individual to the service provider and converting the individual to a user.

1. Adding the Individual to the Service Provider

1. From within the CustomLinc client click the Contact Search button



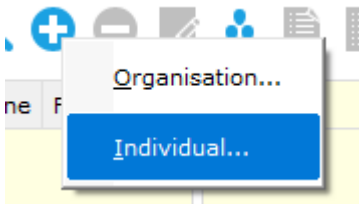
2. Change the dropdown to **Service Provider** and click magnifier button

Service Provider 

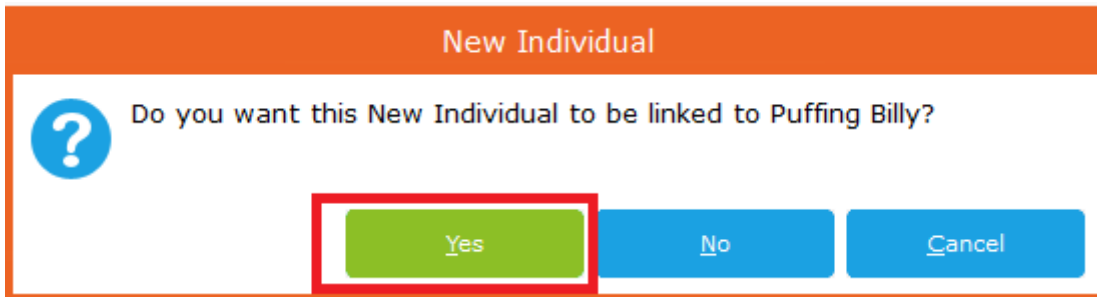
3. From the returned list, highlight **Puffing Billy**

Contact Name	Account Manager	Suburb	City	State
The Grand on Cathies Lane		WANTIRNA SOUTH		VIC
Ranges Hotel Gembrook		GEMBROOK		VIC
Puffing Billy		BELGRAVE		VIC
Mary Eats Cake		MONTROSE		VIC
Lakeside Visitor Centre		EMERALD		VIC
Gembrook Bakery				
Elevation at Emerald		EMERALD		VIC
Burrinja Cafe		UPWEY		VIC

4. Click the + button and select **Individual**



5. When prompted to confirm whether you'd like to add a new individual to Puffing Billy, click Yes



6. Enter the information for the individual and click **Ok**

Individual

Options

Details

Positions

Title Mr ...

Surname John

First Name Smith

Preferred Name

Gender Male ▼

Preferred Contact Other ▼

Archive ☐

Date of Birth

Or Age

Contact Methods

Method	Number / Address

Physical Address Change

Postal Address Change

Notes

OK
Cancel
Apply

7. When asked if you would like the individual to be added as a concierge click **No**

The record for the individual has now been added against the Service Provider.

2. Convert the Individual to a User

1. From the contacts windows, right click the new individual record, move the pointer to **Configure As** and select **User**

Service Provider

Contact Name	Account Manager	Suburb	City	State	Phone	Fax	Contact
Puffing Billy		BELGRAVE		VIC			Contact Id
Testman Mark							

Configure As

Assign To

Select

Agents

User

Supplier

Account Manager

Client

Concierge

Crew Member...

User...

Mechanic

2. From the User Details window enter the details of the user account.

To set the password click the blue ***Change Password*** text. A password field will be displayed that the user's password can be entered into. If the user is not with you at the time of setting a password, use a generic password for now, the user can change their password once logged in.

User Id is the first letter of the first name and the full surname

Details		
User Id	<input type="text" value="MTEST"/>	<input checked="" type="checkbox"/> Sightseeing <input checked="" type="checkbox"/> Express <input type="checkbox"/> Accommodation <input type="checkbox"/> Charter <input type="checkbox"/> Rostering <input type="checkbox"/> Maintenance <input type="checkbox"/> Smart Phone/Offline User <input type="checkbox"/> Is a Shared User <input type="checkbox"/> Allow Auto Logon <input type="checkbox"/> Filter Products
	Change Password	
PIN	<input type="text"/>	
Expiry	<input type="text" value="10/01/24"/>	
	<input type="checkbox"/> Archive	
Position	<input type="text" value="User's Position Title"/>	
Default OCB	<input type="text" value="Puffing Billy"/> ▼	
Send Emails	<input type="text" value="from Organisation (default / recommended)"/> ▼	
Auto Open	<input type="text" value="None"/> ▼	
	<input type="checkbox"/> Send bookings CSV backup file	

Tick the applicable role for the user and select the applicable Op Centre Brand (OCB). In

most cases the OCB will be **Puffing Billy**

Roles	
Assigned	Role
<input type="checkbox"/>	Accounts
<input type="checkbox"/>	Administrator
<input type="checkbox"/>	Customer Service Centre
<input type="checkbox"/>	Dispatch/ Supervisor
<input type="checkbox"/>	Management
<input type="checkbox"/>	Marketing Assistant
<input type="checkbox"/>	Marketing Volunteer
<input checked="" type="checkbox"/>	Reservations
<input type="checkbox"/>	Station Master
<input type="checkbox"/>	System Support
<input type="checkbox"/>	Train Supervisor
<input type="checkbox"/>	Web User

Op Centre Brands	
Assigned	Op Centre Brand
<input checked="" type="checkbox"/>	Puffing Billy
<input type="checkbox"/>	Puffing Billy - Excursion Train
<input type="checkbox"/>	Puffing Billy Railway Social Club

3. Click the **Ok** button

The user account has now been created and the user will be able to log in

Revision #1

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