

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, Account Number, and Source. 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'.

Address	
Type	Address

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

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
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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
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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

Type	Phone / Fax / Email / Web

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 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

Revision #3

Created 2025-09-04 00:58:09 UTC by Dylan Healey

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