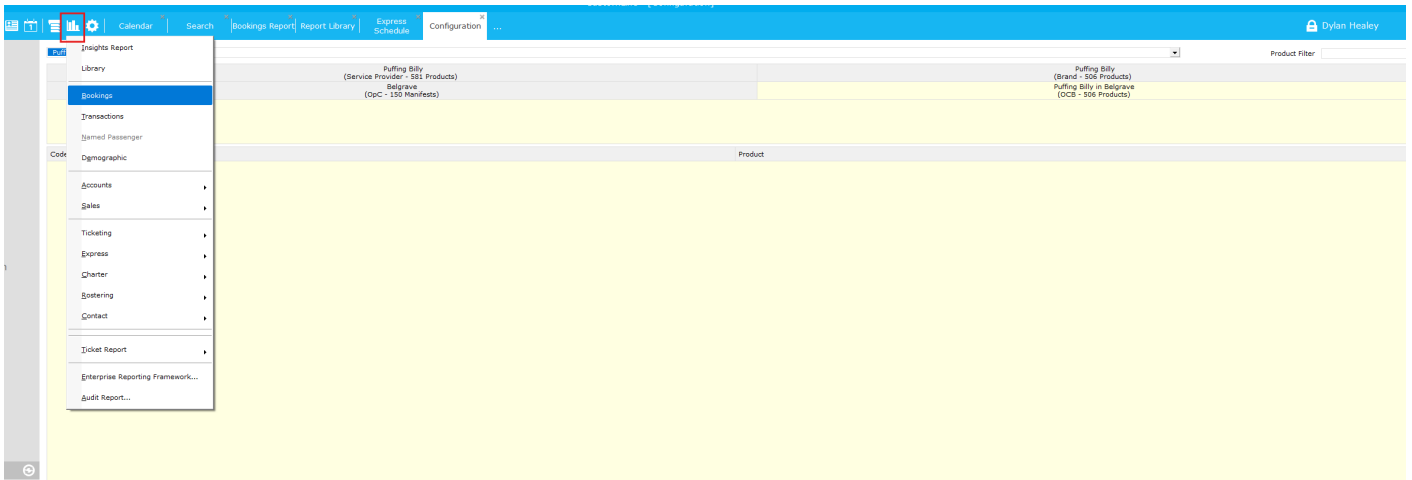


# How to run a Customlinc Report

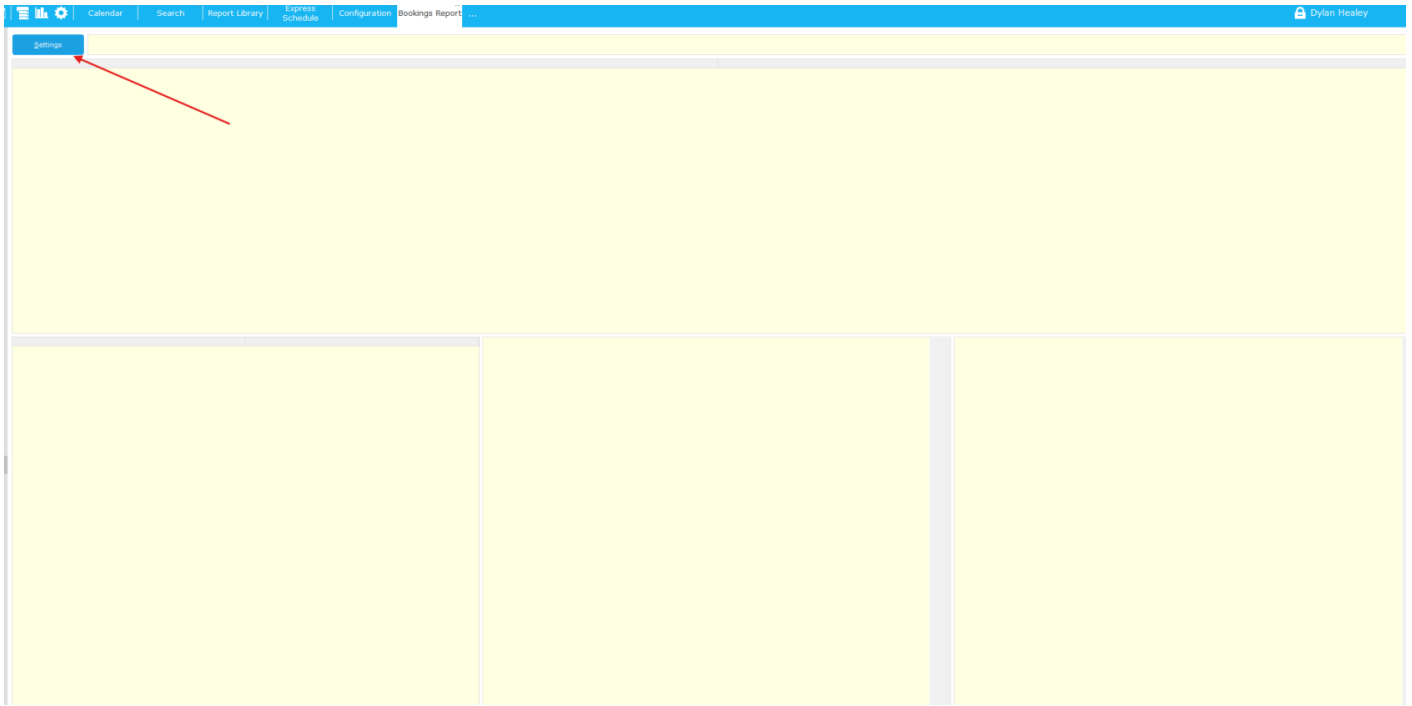
You can run several types of reports within CustomLinc to give more detailed information for large sections of bookings.

To do this click **Reports** tab in the top left

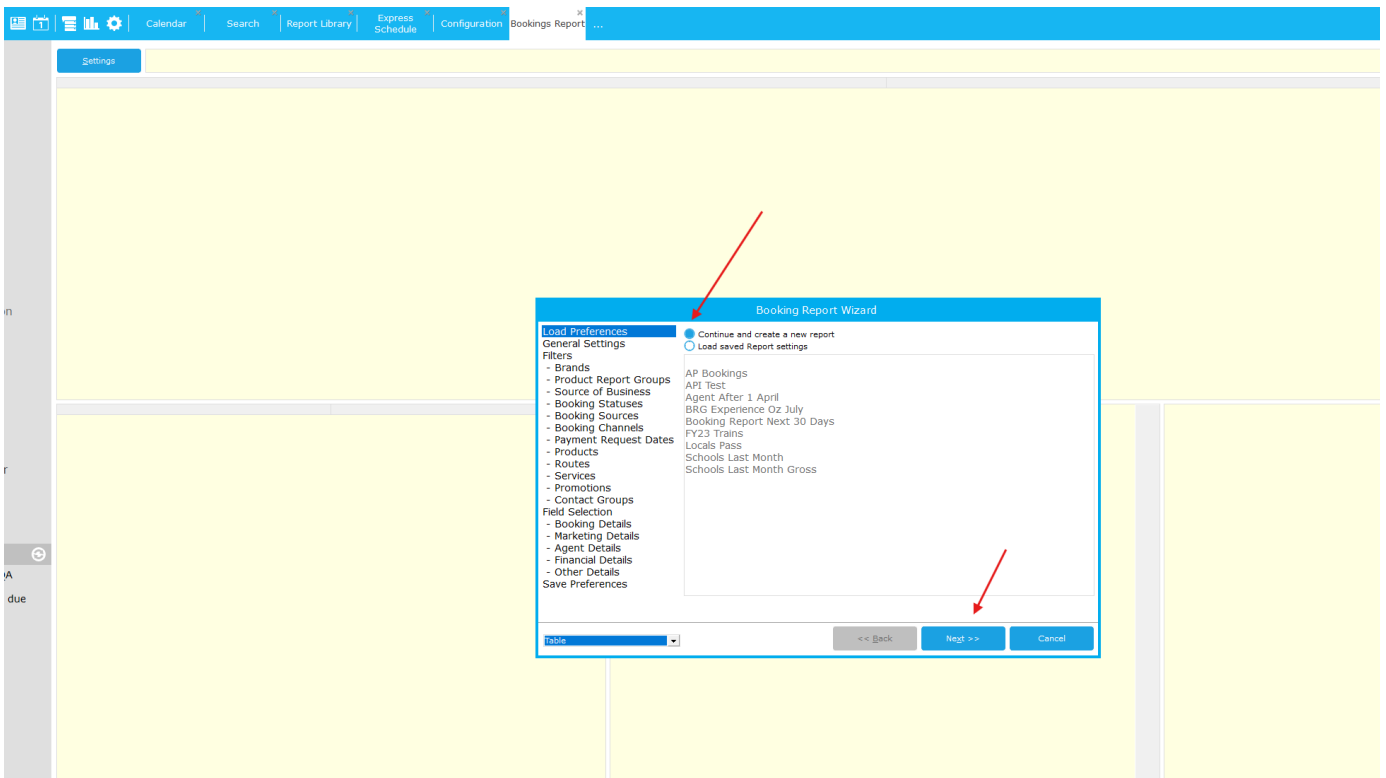


For this example we will run a **Bookings** report.

After clicking, bookings you will need to go to **Settings**



Select **continue and create a new report** then **Next**



Configure your search parameters.

Here I have selected to define my own dates of Date of Travel from 1/12/2024 to 31/12/2024, and only for travel booked under the agent WINE HOP

**Booking Report Wizard**

Load Preferences

**General Settings**

Filters

- Brands
- Product Report Groups
- Source of Business
- Booking Statuses
- Booking Sources
- Booking Channels
- Payment Request Dates
- Products
- Routes
- Services
- Promotions
- Contact Groups

Field Selection

- Booking Details
- Marketing Details
- Agent Details
- Financial Details
- Other Details

Save Preferences

Output Type:

Date range:

From Date:

To Date:

Use:

Group or FITs:

Sales Office:

Booked By:

Agent:

Account Manager:

Sightseeing  
 Express  
 Accommodation  
 Charter

Exclude Package Products  
 Exclude Package Components  
 Package Bookings Only  
 Include Last Year's Bookings  
 Include Open Dated Bookings  
 Include Advanced Sales Fields  
 Bookings with public notes  
 Unreconciled Bookings Only

Table 
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Next >>
Cancel

The next area is **filters**, here you can filter for certain things such as products, promotions and booking channels.

**Booking Report Wizard**

Load Preferences

**General Settings**

**Filters**

- Brands
- Product Report Groups
- Source of Business
- Booking Statuses
- Booking Sources
- Booking Channels
- Payment Request Dates
- Products
- Routes
- Services
- Promotions
- Contact Groups

Field Selection

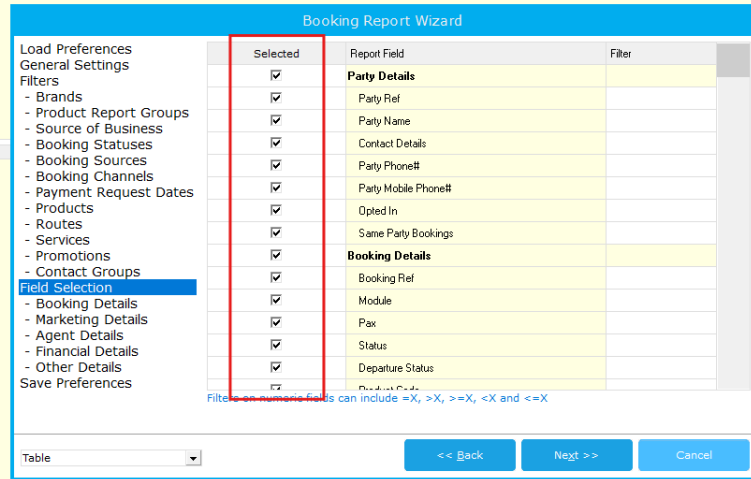
- Booking Details
- Marketing Details
- Agent Details
- Financial Details
- Other Details

Save Preferences

Selected	Brand
✓	Puffing Billy
✓	Puffing Billy Railway Social Club

Table 
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Next >>
Cancel

The next area is **Field Selection**, this is where you will choose what information you want to see from the data that is grabbed. This includes, party numbers, pax, product codes, party name, cost and so much more.



We recommend using as few of these as required to keep your data relevant.

Finally if you want to reuse this report in future you can save the report, **Save Preferences** will only be available if you loaded a saved report at the start. **Save Preferences As** allows you create a new saved report.



Hit finish and your report will be generated.

Row	Party Ref	Party Name	Contact Details	Party Phone#	Party Mobile Phone#	Opted In	Same Party Bookings	Booking Ref	Module	Pax	Status	Departure Status	Product Code	Product Name	Package Name	Package Code	Package Type	Product	Report Group Code	Product	Report Group Name	Date of Travel
1	1572862	WINE HOP				Unsubscribed	1	887790	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		01/12/2024	
2	1572871	WINE HOP				Unsubscribed	1	887799	Sightseeing	48	Boar	Closed	XU141158EL-LAKS	2:15pm Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		01/12/2024	
3	1572872	WINE HOP				Unsubscribed	1	887800	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		02/12/2024	
4	1572875	WINE HOP				Unsubscribed	1	887803	Sightseeing	48	Boar	Closed	XU14115LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO			EXCURSION		Excursion Trains		02/12/2024	
5	1572876	WINE HOP				Unsubscribed	1	887804	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		03/12/2024	
6	1572880	WINE HOP				Unsubscribed	1	887808	Sightseeing	48	Boar	Closed	XU14115LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO			EXCURSION		Excursion Trains		03/12/2024	
7	1572883	WINE HOP				Unsubscribed	1	887811	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		04/12/2024	
8	1572884	WINE HOP				Unsubscribed	1	887812	Sightseeing	24	Boar	Closed	XU111108EL-LAKS	11:10 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		04/12/2024	
9	1572885	WINE HOP				Unsubscribed	1	887813	Sightseeing	48	Conf	Closed	XU14115LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO			EXCURSION		Excursion Trains		04/12/2024	
10	1572886	WINE HOP				Unsubscribed	1	887814	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		05/12/2024	
11	1572888	WINE HOP				Unsubscribed	1	887816	Sightseeing	48	Boar	Closed	XU14115LAK-BELS	2:15pm Lakeside dep to Belgrave / Single TO			EXCURSION		Excursion Trains		05/12/2024	
12	1572890	WINE HOP				Unsubscribed	1	887818	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		06/12/2024	
13	1572893	WINE HOP				Unsubscribed	1	887821	Sightseeing	48	Boar	Closed	XU141158EL-LAKS	2:15pm Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		06/12/2024	
14	1572894	WINE HOP				Unsubscribed	1	887822	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		07/12/2024	
15	1572896	WINE HOP				Unsubscribed	1	887824	Sightseeing	24	Boar	Closed	XU111108EL-LAKS	11:10 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		07/12/2024	
16	1572897	WINE HOP				Unsubscribed	1	887825	Sightseeing	48	Boar	Closed	XU141158EL-LAKS	2:15pm Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		07/12/2024	
17	1572900	WINE HOP				Unsubscribed	1	887828	Sightseeing	24	Boar	Closed	XU101008EL-LAKS	10:00 Bel dep to Lakeside / Single TO			EXCURSION		Excursion Trains		08/12/2024	

From here you can double click an item in this list to be taken to the actual booking, you can also right click and export as a **.CSV** if you would like to look at this in excel.

You can traverse between the report and bookings with the tabs at the top.

Row	Party Ref	Party Name	Contact Details	Party Phone#	Party Mobile Phone#	Opted In	Same Party Bookings	Booking Ref	Module	Pax	Stat
1	1572862	WINE HOP				Unsubscribed	1	887790	Sightseeing	24	Boar
2	1572871	WINE HOP				Unsubscribed	1	887799	Sightseeing	48	Boar
3	1572872	WINE HOP				Unsubscribed	1	887800	Sightseeing	24	Boar
4	1572875	WINE HOP				Unsubscribed	1	887803	Sightseeing	48	Boar
5	1572876	WINE HOP				Unsubscribed	1	887804	Sightseeing	24	Boar
6	1572880	WINE HOP				Unsubscribed	1	887808	Sightseeing	48	Boar
7	1572883	WINE HOP				Unsubscribed	1	887811	Sightseeing	24	Boar
8	1572884	WINE HOP				Unsubscribed	1	887812	Sightseeing	24	Boar
9	1572885	WINE HOP				Unsubscribed	1	887813	Sightseeing	48	Conf
10	1572886	WINE HOP				Unsubscribed	1	887814	Sightseeing	24	Boar
11	1572888	WINE HOP				Unsubscribed	1	887816	Sightseeing	48	Boar
12	1572890	WINE HOP				Unsubscribed	1	887818	Sightseeing	24	Boar
13	1572893	WINE HOP				Unsubscribed	1	887821	Sightseeing	48	Boar
14	1572894	WINE HOP				Unsubscribed	1	887822	Sightseeing	24	Boar
15	1572896	WINE HOP				Unsubscribed	1	887824	Sightseeing	24	Boar
16	1572897	WINE HOP				Unsubscribed	1	887825	Sightseeing	48	Boar
17	1572900	WINE HOP				Unsubscribed	1	887828	Sightseeing	24	Boar

Revision #1

Created 2025-01-22 11:41:15 UTC by Dylan Healey

Updated 2025-01-22 13:13:19 UTC by Dylan Healey