

User Management

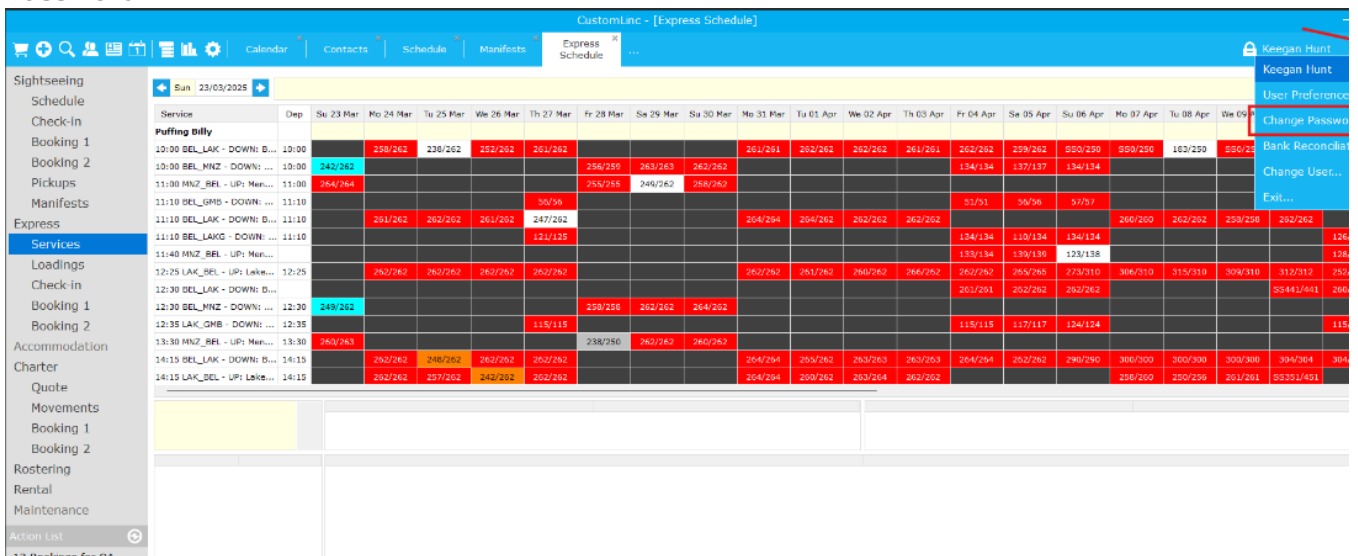
Documentation on management of end users (Staff/Vols) inside of CustomLinc

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Custom Linc Password Change

This article will show you how to change your password in Custom Linc

1. Open Custom Linc. At the top right, hit the drop-down arrow and select "Change Password".



2. Enter your old password, followed by your new password.

A screenshot of the 'Change Password' dialog box. The dialog has a title bar that says 'Change Password'. Inside, there are three input fields: 'Old Password', 'New Password', and 'Confirm Password'. The 'New Password' field has a question mark icon next to it. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

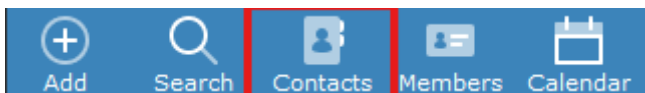
Creating a New User / CustomLinc

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



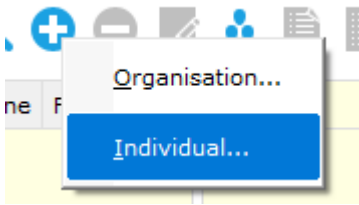
2. Change the dropdown to **Service Provider** and click magnifier button

Service Provider 

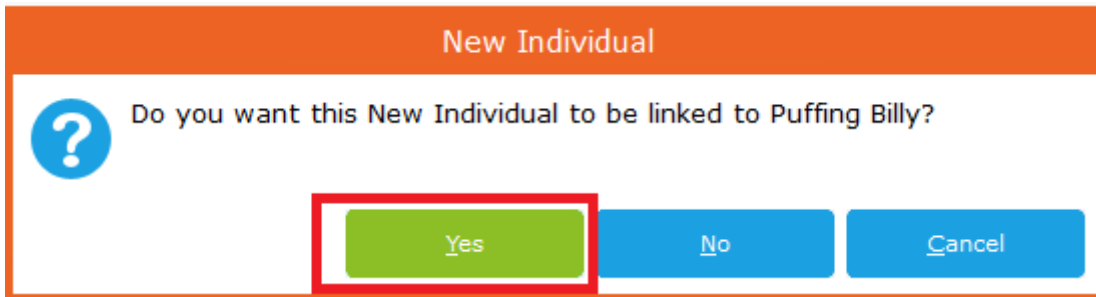
3. From the returned list, highlight **Puffing Billy**

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
Puffing Billy		BELGRAVE		VIC		
Testman Mark						

Contact
Contact Id

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

MTEST

[Change Password](#)

PIN

Expiry

10/01/24

☐ Archive

Position

User's Position Title

Default OCB

Puffing Billy

Send Emails

from Organisation (default / recommended)

Auto Open

None

☐ Send bookings CSV backup file

☒ Sightseeing

☒ Express

☐ Accommodation

☐ Charter

☐ Rostering

☐ Maintenance

☐ Smart Phone/Offline User

☐ Is a Shared User

☐ Allow Auto Logon

☐ Filter Products

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
☐	Accounts
☐	Administrator
☐	Customer Service Centre
☐	Dispatch/ Supervisor
☐	Management
☐	Marketing Assistant
☐	Marketing Volunteer
☒	Reservations
☐	Station Master
☐	System Support
☐	Train Supervisor
☐	Web User

Op Centre Brands	
Assigned	Op Centre Brand
☒	Puffing Billy
☐	Puffing Billy - Excursion Train
☐	Puffing Billy Railway Social Club

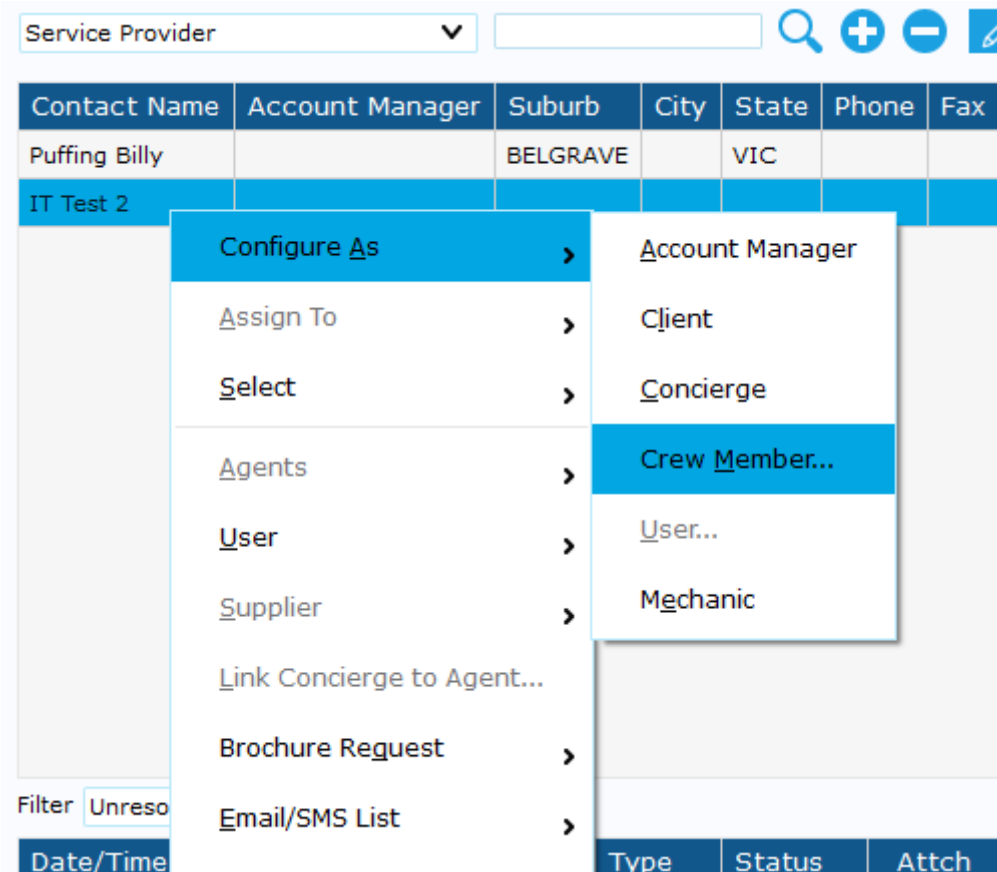
3. Click the **Ok** button

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

Adding RFID - Custom Linc

This article will show you how to add an RFID tag to a user's account in Custom Linc.

1. Firstly, you will have to convert the staff member to a crew member. Search the user in Custom Linc. Right click the user and select "Configure as > Crew Member".



2. This box will open up. Click "Depot" on the left-hand side and click "Apply".

Details

Notes

RFID Tags

Depots

Roles

Skills

Qualifications

Resource Types

Search

Details for IT Test

Depots

From	To	Depot
------	----	-------

Roles

☐ Show All

Assigned	Role
----------	------

Skills

☐ Show All

Assigned	Skill
----------	-------

Qualifications

Type	License #	Exp Date	Payroll
------	-----------	----------	---------

OK

Cancel

Apply

3. This box will appear, in "Depot", select "Puffing Billy". hit apply and then close.

[illegible]

4. In the left column head to "RFID Tags", right click in the empty space under "RFID No" and click add.

Details

Notes

RFID Tags

Depots

Roles

Resource Types

Search

Details for IT Test 2

RFID Tags

RFID No

Add...

Delete...

Properties...

Depots

	To	Depot
08/0		Puffing Billy

Roles

☐ Show All

Assigned	Role

Resource Types

Assigned	Resource Type
☐	Dining Car
☐	Excursion Train
☐	POLAR EXPRESS

OK

Cancel

Apply

- This will show a box with tag no, when clicked into the dialogue box, swipe the RFID tag onto the RFID reader you are assigning to that user. Then hit ok.



User Details

Options

- Details
- Roles
- Op Centre Brand:
- Depots
- Notes
- Signature
- Alerts Members
- Wheelchair Alert
- Crew Roles visible in
- Portal Workstations

Search

Details

User Id

DHEALEY

☒ Sightseeing
 ☒ Express
 ☐ Accommodation
 ☒ Charter
 ☒ Rostering
 ☐ Maintenance
 ☒ CustomLinc Portal / Offline User
 ☐ Is a Shared User
 ☐ Allow Auto Logon
 ☐ Filter Products
 ☐ Use Single Sign On

PIN

Expiry

27/06/2026

☐ Archive

Position

Default OCB

Puffing Billy

Send Emails

from Organisation (default / recommended)

Auto Open

None

☐ Send bookings CSV backup file

Reset Password

Clear SSO Token

Roles

Assigned	Role
☒	Administrator
☒	System Support
☐	Accounts

OK

Close

Apply

3. To confirm this has been done you can see the expiry date no longer shows under Contact Types

Contact	Dylan Healey
Contact Id	421946
Last Modified	10/07/2025 11:39
Business Email	dylan.healey@pbr.org.au
Contact Types	User Staff Member

4. Please leave a Note under the user to note they have an RFID attached.

Options

Details

Roles

Op Centre Brand:

Depots

Alerts Members

Portal Workstations

Search

User Details

Details

User Id

EFITZSIMONS

PIN

Expiry

10/10/2025

☐ Archive

Position

Default OCB

Puffing Billy

Send Emails

from Organisation (default / recommended)

Auto Open

None

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Reset Password

Clear SSO Token

☒ Sightseeing

☒ Express

☐ Accommodation

☐ Charter

☐ Rostering

☐ Maintenance

☐ CustomLinc Portal / Offline User

☐ Is a Shared User

☐ Allow Auto Logon

☐ Filter Products

☐ Use Single Sign On

Roles

Assigned	Role
☒	Administrator
☒	Customer Service Centre
☒	Dispatch/ Supervisor

OK

Close

Apply

Show All

User Details

Options

Details

Roles

Op Centre Brand:

Depots

Notes

Signature

Alerts Members

Wheelchair Alert

Crew Roles visible in

Portal Workstations

Search

Notes

Signature

Unreconciled Bookings

☐ Send all Unreconciled Bookings 

OK

Cancel

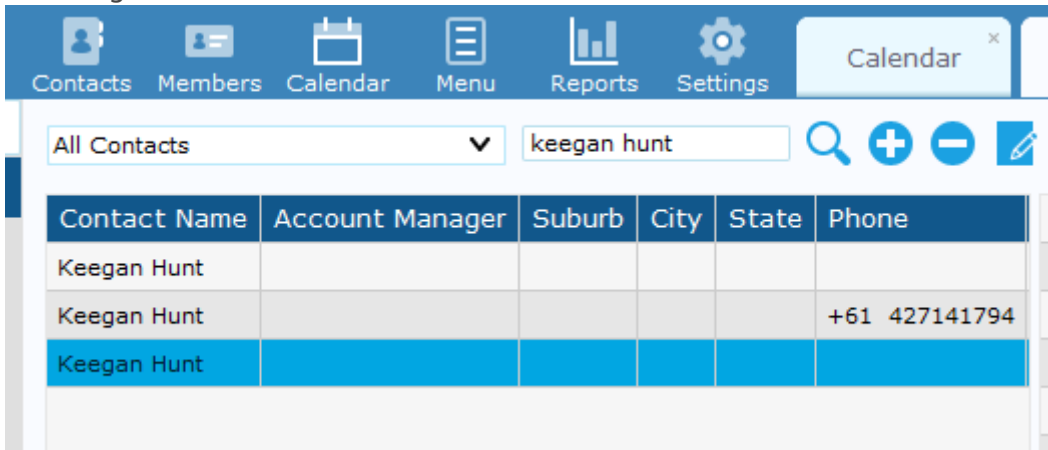
Apply

5. The user can low login using RFID.

Removing RFID - CustomLinc

This article will show you how to remove an RFID tag from a user.

1. Open Custom Linc, select "Contacts" and search for the desired person to remove the RFID tag from.



2. Click on the user's name to open the menu on the right and select "staff".



3. Click on RFID tags, right click on the RFID number and select delete. Then click ok in the bottom right.

Details for Keegan Hunt

Details

Notes

RFID Tags

Depots

Roles

Resource Types

Search

RFID Tags

RFID No

0221059387

Add...

Delete...

Properties...

Depots

F

To

Depot

Roles

Show All

Assigned

Role

...

Resource Types

Assigned

Resource Type

☐

Dining Car

☐

Excursion Train

☐

POLAR EXPRESS

OK

Cancel

Apply

4. RFID has now been removed.