



ADX Navigation
June 2022

Contents

1. ADX Navigation	3
1.1. ADVISOR DASHBOARD	4
1.2. TRIP SERVICES PAGE.....	9
2.2.1 Common Features.....	10
2.2.2 Trip Tab	14
2.2.3 Client and Travelers Tab.....	24
2.2.4 Payment Tab	26
2.2.5 Service Fees Tab.....	28
2.2.6 Manage Tab	Error! Bookmark not defined.
1.3. PAYMENT PAGE.....	33

1.ADX Navigation Overview

ADX is an itinerary building platform with complex backend contract integration for air, hotels, activities, and insurance services. Advisors can build custom trip itineraries, select from commissionable services, and add bundle and service fees. All management of client profiles as well as services will be done directly within ADX. Vendor notifications will keep advisors apprised of any changes, cancellations, and payment deadlines.

When working in the ADX system, you will need to familiarize yourself with two main advisor pages: **the advisor dashboard and the trip services page.**

Dashboard

ADX Providers Clients Resources Bookings Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej

ITINERARY BUILDER

AIR

HOTEL

ACTIVITY

INSURANCE

CRUISE

INVOICE TOOL

USING ADX AS: Me

MY QUOTES & BOOKINGS

Filters: Advisors: Me X Clear Filters

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
BOOKED (M)	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🔗 📄	01.25.22	View
ACTION REQ	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🔗 📄	01.19.22	View
TRAVEL	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🔗 📄	01.19.22	View
BOOKED (M)	AK	Sam Smith	The Regent Resort Chiang Mai	04.18.22	🔗 📄	01.17.22	View
TRAVEL	AK	john smith	Courtyard Marriott College Stn	01.24.22	🔗 📄	01.14.22	View
BOOKED (M)	AK	Tom Haggins	Via Rail Canada	01.28.22	🔗 📄	01.10.22	View
ACTION REQ	AK	john smith	Ritz Carlton Marina Del Rey	01.19.22	🔗 📄	01.10.22	View
BOOKED (M)	AK	Tom Haggins	Hertz Rent a Car	01.27.22	🔗 📄	01.10.22	View

CLIENTS TRAVELING IN THE NEXT 10 DAYS

Reference Number	Travelers	Departure
4ZoKRT	Smith/Sarah	Apr 26 2022
4ZoLRM	Jones/Adam	Apr 26 2022
3C5D4F	Duck/Donald	Apr 26 2022
4ZoXE0	Casper/Abigail	Apr 26 2022

NOTICE BOARD

[+ Create](#)

Cara Jones AK

ADX Ref. 51MSUT - Last Ticketing Date Passed Feb 02 2022

ADX Ref. 7W6J0 - Generic Notice

AK

Trip Services Page

ADX Providers Clients Resources Bookings Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej

Round Trip Flights: Los Angeles - Rome

Sunday, June 12, 2022 - Sunday, June 19, 2022

ADX Ref. 3E2TNF | Archive | Copy Quote | Link Bookings quote

Trip

Client & Travelers

Payment

Service Fees

Manage

Refresh Quote

Trip Name: Round Trip Flights: Los Angeles - Rome

Dates: 06/12/2022 06/19/2022 Add details/notes

All Services

View by: 📄 🗑️

Round-Trip Los Angeles to Rome Rename OFFERED

Jun 12, 2022 - Jun 19, 2022

Book Remove

Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules

Palazzo Naiado, Rome Rename OFFERED

Jun 13, 2022 - Jun 18, 2022

Book Remove

Actions: Modify

Travel Select Plan Rename OFFERED

Jun 12, 2022 - Jun 19, 2022

Book Remove

Actions: Modify

Actions: Reorder Services

Client Documents: Insurance offered

Update

Add ADX Service -

Add non-ADX Service -

Send Itinerary

1.1. ADVISOR DASHBOARD

The advisor dashboard is the main landing page in ADX. The purpose of this page is to be the starting point of all ADX quotes and sales, manage your recent itineraries and those ready to travel, access all notifications for active bookings and see Travel Edge promotions pertaining to cruise and hotel.

1. Tool Bar

- a) ADX home page
- b) Providers
- c) Clients
- d) Resources
- e) Commission Display
- f) Search
- g) Advisor Portal

2. Modules

- ITINERARY BUILDER
- AIR
- HOTEL
- ACTIVITY
- INSURANCE
- CRUISE
- INVOICE TOOL

3. Quotes and Bookings

USING ADX AS: Me

MY QUOTES & BOOKINGS [VIEW ALL](#)

Filters: Advisers: Me X [Clear Filters](#)

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	View
OPEN	AK		Round Trip Flights: Los Angeles - Rome	05.12.22	✈️ 🏨	04.26.22	View
BOOKED BY	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🚢 🏨	01.25.22	View
ACTION REQUIRED	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🚢 🏨	01.19.22	View
TRAVELING	AK	Cara Jones	Four Seasons Maui At Wailea	03.14.22	🚢 🏨	01.19.22	View
BOOKED BY	AK	Sam Smith	The Regent Resort Chiang Mai	04.18.22	🚢 🏨	01.17.22	View

4. Traveling Report

CLIENTS TRAVELING IN THE NEXT 10 DAYS

Reference Number	Travelers	Departure
4ZuKMT	Smith/Sarah	Apr 26 2022
4ZuLRM	Jones/Adam	Apr 26 2022
3CSD4F	Duck/Donald	Apr 26 2022
4ZuKTD	Casper/Abigail	Apr 26 2022

5. Notice Board

NOTICE BOARD [VIEW ALL](#)

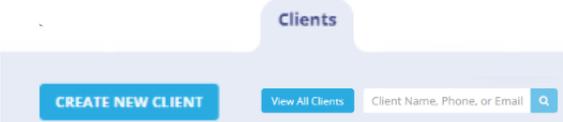
[+ Create](#)

- Cara Jones** AK
ADX Ref. 51MSUT - Last Ticketing Date Passed Feb 02 2022
- ADX Ref. 7W6J0 - Generic Notice AK
Jan 20 2022
- ADX Ref. 6PS/SP - Generic Notice AK
Jan 17 2022

6. Promotions

PROMOTIONS

Type	Title	Starts	Ends	Description	Vendor
📢	NEW - Travel Edge amenity sailings program 2021 - 2023	Apr 05 2021	May 31 2023	Book your clients on any of the attached list of Oceania sailings and they will receive pre-paid Read More Attachments: Oceania Cruises OCAPP - TRAVEL EDGE September 2021 - May 2023.pdf	OCEANACRUISES

	Section		Notes
1.	Tool Bar		<ul style="list-style-type: none"> The tool bar will be accessible from anywhere in ADX
a)	ADX home page 		<ul style="list-style-type: none"> Return to the main dashboard from anywhere within ADX by pressing the ADX icon
b)	Providers 		<ul style="list-style-type: none"> Access provider content including contact information, promotions, preferred partner lists Refer to the Providers section for more information
c)	Clients 		<ul style="list-style-type: none"> Create new client profile Access client profile <ul style="list-style-type: none"> View all clients – see all client profiles Download a client list Search by first name OR last name OR phone # OR email Refer to the Client Profiles section for more information
d)	Resources 		<ul style="list-style-type: none"> Training and support resources including: <ul style="list-style-type: none"> PDF guides webinar registration video links FAQ's, Travel Edge training calendar

		<ul style="list-style-type: none"> ○ <i>support request portal</i> ● <i>Refer to the Access Support section for more information</i>
e)	<p>Commission Display</p> 	<ul style="list-style-type: none"> ● <i>Toggle between showing commission and hiding it on the agent facing pages including all searches and the trip services page</i> <ul style="list-style-type: none"> ○  <i>Commission is OFF</i> ○  <i>Commission is ON</i>
f)	<p>Search</p> 	<ul style="list-style-type: none"> ● <i>Use the v to change the search from bookings to providers</i> ● <i>Bookings - Search for existing reference on your account by entering the ADX reference, air PNR reference number, invoice number</i> ● <i>Search for providers...</i>
g)	<p>Advisor Portal</p> 	<ul style="list-style-type: none"> ● <i>Press the v to expand the profile and account options</i> <ul style="list-style-type: none"> ○ <i>My Profile – customize your advisor profile, set up your Travel Edge profile page, change passwords, set planning fee defaults</i> ○ <i>Reports – Access your advisor statement, unclaimed reports, unreceived reports</i> ○ <i>Lout of out ADX</i> ● <i>Refer to the Advisor Profile section for more information</i>
2.	<p>Modules</p>	<ul style="list-style-type: none"> ● <i>Modules of product types that you can sell directly in ADX</i> <ul style="list-style-type: none"> ○ <i>Air, hotel, activities, insurance</i> ● <i>Cruise and Invoice tool allow for invoicing external services booked outside of ADX</i> ● <i>Itinerary builder allows you to create a shell itinerary with no services on it</i> <ul style="list-style-type: none"> ○ <i>Refer to the Itinerary Builder section for more information</i> ● <i>Blue buttons – Services that you can sell to your clients through ADX</i>

		<ul style="list-style-type: none"> • <i>White buttons – Invoicing of external bookings</i>
3.	Quotes and Bookings	<ul style="list-style-type: none"> • <i>See the most recent 8 quotes and booking created</i> • <i>Use the filters to view by status, agent, quote name, departure, service type, update time frame</i> • <i>Press VIEW to jump directly to that itinerary</i> • <i>Use the “Using ADX AS” to select who’s quotes/bookings/notifications you would like to see</i> <ul style="list-style-type: none"> ○ <i>View ONLY your own items</i> ○ <i>View delegate items</i> ○ <i>View ALL items shared with others within your branch</i> • <i>View All will show ALL references booked in ADX</i> • <i>Refer to the Post Booking Management section for more information</i>
4.	Traveling Report	<ul style="list-style-type: none"> • <i>List of any active ADX references where the travel date begins in the next 10 days</i> • <i>Itineraries that are in CANCELLED/CLOSED status will not appear</i> • <i>Click the ADX reference to open trip services page</i>
5.	Notice Board	<ul style="list-style-type: none"> • <i>All notifications that are sent from vendors for air and hotel will display here</i> • <i>All notifications that are manually set will display here</i> • <i>Clicking on the notification will open the notice for review and actioning</i> • <i>View All will show ALL notifications – actioned and unactioned</i> • <i>Notifications will also display directly on ADX trip reference</i> • <i>Refer to Post Booking Management section for more information</i>
6.	Promotions	<ul style="list-style-type: none"> • <i>Displays current Travel Edge cruise and hotel promotions</i> • <i>Use the v to filter sort by type and vendor</i>

		<ul style="list-style-type: none">• <i>Click on attachment pages to open details provided</i>
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1.2. TRIP SERVICES PAGE

All itineraries built and quoted/booked/ticketed will live on a **trip services page** - the reference page for all of the services pertaining to a single trip. This is where you will view and manage your client trip information. Trip Services will each have their own alpha numeric ADX reference located on the top left corner of the page.

The trip services page will be divided into several tabs: **TRIP, CLIENT AND TRAVELERS, PAYMENT, SERVICE FEES, MANAGE**

The screenshot displays the ADX Trip Services Page for a Round Trip Flights: Los Angeles - Rome. The page is organized into several sections:

- Header:** Includes the ADX logo, navigation tabs (Providers, Clients, Resources, Bookings), a search bar for Cruise ID, ADX Ref, PNR, or Invoice #, and a user profile for Anna Kulej.
- Trip Information:** Shows the trip name "Round Trip Flights: Los Angeles - Rome", dates "Sunday, June 12, 2022 - Sunday, June 19, 2022", and the advisor "Sam Smith" (Advisor: Anna Kulej). It also includes an ADX Ref (3E2TNF) and options to Archive, Copy Quote, or Link Bookings.
- Navigation Tabs:** Includes "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage".
- Trip Details:** A form for Trip Name and Dates (06/12/2022 to 06/19/2022) with an "Add details/notes" dropdown.
- All Services:** A list of services with "View by" options. The services listed are:
 - Round-Trip Los Angeles to Rome:** Jun 12, 2022 - Jun 19, 2022. Actions: Select New Flights, Ask Air Support, Seat Plan, Fare Rules.
 - Palazzo Naiado, Rome:** Jun 13, 2022 - Jun 18, 2022. Action: Modify.
 - Travel Select Plan:** Jun 12, 2022 - Jun 19, 2022. Action: Modify.
- Summary and Insurance:** A green box showing an Estimated Quote of USD \$155.00 and Potential Commission of USD \$40.00, with an "Add Insurance" button. Another green box shows Client Documents: Insurance offered, with an "Update" button.
- Footer:** Includes buttons for "Add ADX Service", "Add non-ADX Service", and "Send Itinerary".

2.2.1 Common Features

These features/buttons will be available from **any** selected tabs on the trip services page.

The screenshot shows a web interface for trip services. At the top, there are navigation tabs: 'ADD', 'Providers', 'Clients', 'Resources', 'Bookings', and a search bar. Below this, a header section displays 'Round Trip Flights: Los Angeles - Rome' with dates 'Sunday, June 12, 2022 - Sunday, June 19, 2022' and an 'ADX Ref. 3E2TNF'. A 'Client Information' box on the right shows 'Sam Smith' and 'Advisor: Anita Kulej'. A 'Management Tabs' section includes 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The main content area lists services like 'Round-Trip Los Angeles to Rome' and 'Palazzo Nalada, Rome', each with 'Book' and 'Remove' buttons. At the bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', 'Compare Services', and 'Send Itinerary'. A summary box shows 'Estimated Quote: USD \$155.00' and 'Client Documents: Insurance offered'.

- 1. Trip Details
- 2. ADX reference
- 3. Archive
- 4. Copy Quote
- 5. Link Bookings
- 6. Management Tabs
- 7. Client Information
- 8. Primary Advisor
- 9. Itinerary Status
- 10. Add ADX Services
- 11. Add non ADX Services
- 12. Compare Services
- 13. Send Itinerary

	Section		Notes
1.	Trip details		<ul style="list-style-type: none"> • <i>Trip name and trip start and end dates</i> • <i>Edit the trip name section of the trip tab to change the name</i> • <i>Automatically default to name of first service added</i> • <i>Automatically default to dates based on services added</i>
2.	ADX Reference		<ul style="list-style-type: none"> • <i>Internal alpha numeric reference specific to an ADX itinerary</i> • <i>Use this number in the Quick Search for quick access to the reference</i> • <i>Reference this number when working with ADX support</i>
3.	Archive		<ul style="list-style-type: none"> • <i>Hide itineraries no longer needed – will no longer appear in the quote and bookings section of the dashboard</i> • <i>Archiving can be done from the trip services page and the View All Quotes and bookings page</i> • <i>Refer to the Post Booking Management section for more information</i>
4.	Copy Quote		<ul style="list-style-type: none"> • <i>Copy all of the services on an ADX reference into a new reference</i> • <i>Services MUST be in a quoted status – cannot copy quote if services are booked/paid or the itinerary is Travel Ready status</i>
5.	Link Bookings		<ul style="list-style-type: none"> • <i>Link multiple ADX references together for quick access – ie. multiple clients travelling together</i> • <i>Each linked reference will show linked information in the trip details section</i> • <i>Will not link references with providers, ONLY for internal use</i> • <i>Refer to the Post Booking Management section for more information</i>
6.	Management Tabs		<ul style="list-style-type: none"> • <i>Trip details are divided into different management tabs or sections:</i>

		<ul style="list-style-type: none"> ○ <i>Trip – Trip details for all services</i> ○ <i>Client and Travelers – Client and companion information</i> ○ <i>Payments – Process payments and review invoices</i> ○ <i>Service Fees – Add and collect on fees</i> ○ <i>Manage – Review notifications, send client emails</i> ● <i>Press on the blue tab to see the details within that section</i>
7.	Client Information	<ul style="list-style-type: none"> ● <i>Will show once you've assigned a client to the reference</i> ● <i>Assign client through the Client and Travelers tab</i>
8.	Primary Advisor	<ul style="list-style-type: none"> ● <i>Owner of the quote/booking</i> ● <i>If using delegation access this can be changed at the time of the quote creation</i>
9.	Itinerary Status	<ul style="list-style-type: none"> ● <i>Status depends on the ALL services added to an ADX reference</i> ● <i>Refer to the Understanding Statuses sections for more information</i>
10.	Add ADX Services	<ul style="list-style-type: none"> ● <i>Add services bookable through ADX to this reference to build a complete trip itinerary</i> <ul style="list-style-type: none"> ○ <i>Air, hotel, insurance, activity</i> ○ <i>Cruise – uses cruise line inventory for external invoicing purposes</i> ○ <i>Planning fee</i>
11.	Add non-ADX Services	<ul style="list-style-type: none"> ● <i>Add services booked directly with suppliers for commission tracking and itinerary building purposes</i> ● <i>These services are managed external to ADX, with vendors directly</i>
12.	Compare Services	<ul style="list-style-type: none"> ● <i>Send a service comparison of up to 4 different service options</i>

		<ul style="list-style-type: none"> • <i>This will appear when you have more than 1 of the same type of services</i> <ul style="list-style-type: none"> ○ <i>2+ air services</i> ○ <i>2+ hotel services</i> ○ <i>2 + activity services</i>
13.	Send Itinerary	<ul style="list-style-type: none"> • <i>Send a client itinerary with all service details</i> • <i>Can be sent at any time – quoted or after fully booked</i> • <i>Can be sent with or without client information – at quote</i> • <i>Refer to the Customizing the Client Itinerary section for more information</i>

2.2.2 Trip Tab

The trip tab will show the summary of the services either by the service view or a calendar view and be where all management happens for each service. The trip tab will have the following sections:

1. Trip Details and Notes – Customize the reference information to show on the client itinerary
 - Refer to the Customizing the Client Itinerary for more information on full customizations
2. View: Calendar vs Service – Select the view type and reordering options
3. Service Details – Review service details, manage services via the action buttons
4. Reorder Services – change the ordering of the services on the trip page and the itinerary
5. Upsell Insurance

1. Trip Details and Notes

The screenshot displays the ADX Trip Tab interface. At the top, there are navigation tabs: Providers, Clients, Resources, Bookings, and a search bar. The main header shows the trip title "Round Trip Flights: Los Angeles - Rome" and the advisor "Sam Smith". Below this, there are tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. The "Trip" tab is active, showing the trip name "Round Trip Flights: Los Angeles - Rome" and dates "06/12/2022" to "06/19/2022". Below the trip details, there is a list of services under the heading "All Services". The services listed are: "Round-Trip Los Angeles to Rome" (Jun 12, 2022 - Jun 19, 2022), "Round-Trip Los Angeles to Rome" (Jun 12, 2022 - Jun 19, 2022), "Palazzo Naiardo, Rome" (Jun 13, 2022 - Jun 18, 2022), and "Travel Select Plan" (Jun 12, 2022 - Jun 19, 2022). Each service has a "Book" button and a "Remove" button. At the bottom, there is a section for "Estimated Quote" showing "USD \$155.00" and "Potential Commission USD \$40.00", and a section for "Client Documents" showing "Insurance offered". There are buttons for "Add Insurance" and "Update".

ADX® Providers Clients Resources Bookings Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej

ADX Ref. 3E2TNF | Archive | Copy Quote | Link Bookings QUOTE

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

Trip Name **Dates**

Round Trip Flights: Los Angeles - Rome 06/12/2022 06/19/2022 Close ^

Description 1300 characters max Upload Attachments 4MB max

Advisor Background 1300 characters max Upload Cover Image 4MB max

Advisor-only Notes

Hide Cancelled Services Cancel Save changes

*The ideal image size for the client itinerary cover is 1250px height and 970 px width. Please note that all images will be scaled to fit vertically and then centered horizontally. Using images as close as possible to this aspect ratio will allow you to best utilize your images.

a. Trip Name and Date

b. Description

c. Advisor Background

d. Advisor only Notes

e. Hide Cancelled Services

f. Upload Attachments

g. Upload Cover Image

h. Save Changes

	Section		Notes
1.	Trip details and notes		<ul style="list-style-type: none"> • <i>Press the v button to expand the details and notes section</i> • <i>Details includes trip name, dates, description, advisor background, advisor notes and attachments, hiding cancelled services</i> • <i>This section will customize the details of the client itinerary</i>
a.	Trip name and dates		<ul style="list-style-type: none"> • <i>Change the trip name to personalize the ADX reference and client document</i> • <i>Change the dates to add more services to the reference</i>
b.	Description		<ul style="list-style-type: none"> • <i>Add a trip description to show on the client itinerary</i>
c.	Advisor Background		<ul style="list-style-type: none"> • <i>Will pull from the advisor public profile – if active</i> • <i>Details will show on the client itinerary</i> • <i>Can be turned off through the advisor profile</i>
d.	Agent-only notes		<ul style="list-style-type: none"> • <i>Clients do not see this information – agent facing ONLY</i>
e.	Hide Cancelled Services		<ul style="list-style-type: none"> • <i>Opt to hide any services on the ADX reference that is in a cancelled status</i>
f.	Upload Attachements		<ul style="list-style-type: none"> • <i>Added attachments will show on the client itinerary as another file</i> • <i>When sending itinerary out of ADX the added files will send as an attachment in the email with the attached itinerary document</i> • <i>Max file size is 4 MB</i>
g.	Upload Cover Image		<ul style="list-style-type: none"> • <i>Personalize the client itinerary by adding a cover image</i> • <i>Max file size is 4 MB</i>

h.	S:
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2. View: Calendar vs Service

	Section		Notes
2.	View by: Calendar vs. Service	•	<i>Toggle between calendar and service views</i>

- | | | |
|--|--|---|
| | | <ul style="list-style-type: none">○  <i>Calendar view – use the date picker to toggle between days</i>○  <i>Service view – see list of all services</i>● <i>View will default to calendar</i> |
|--|--|---|

Round Trip Flights: Los Angeles - Rome Sam Smith
Advisor: Anna Kulej

Sunday, June 12, 2022 - Sunday, June 19, 2022
 ADX Ref: 3E2TNF [Archive] Copy Quote | Link Bookings Quote

- Trip
- Client & Travelers
- Payment
- Service Fees
- Manage

Refresh Quote

Trip Name: Round Trip Flights: Los Angeles - Rome
 Dates: 06/12/2022 - 06/19/2022
 Add details/notes

All Services View by: [Grid] [List]

3. Service Details

Round-Trip Los Angeles to Rome Quote

Jun 12, 2022 - Jun 19, 2022 Book

Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules Remove

Round-Trip Los Angeles to Rome Quote

Jun 12, 2022 - Jun 19, 2022 Book

Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules Remove

GDS: Sabre
 AIR SUPPORT HOURS
 Mon-Fri: 10:00 am EDT - 7:00 pm EDT

SERVICE DETAILS

Sunday, June 12, 2022 - Los Angeles (LAX) to Rome (FCO)

<p>Los Angeles (LAX) to Montréal (YUL) Jun 12, 2022 AIR CANADA Flight 774 Class: S Cabin: Economy Aircraft: 788 Baggage Allowance: 1 Piece/Passenger 2h 51m Layover in Montréal</p>	<p>Duration: 5h 19m Departure: 7:55 AM Terminal: 6 Arrival: 4:14 PM Terminal:</p>
<p>Montréal (YUL) to Rome (FCO) Jun 12, 2022 AIR CANADA Flight 892 Class: S Cabin: Economy</p>	<p>Duration: 8h 0m Departure: 7:05 PM Terminal: Arrival: 9:05 AM</p>

- Add ADX Service -
- Add non-ADX Service -
- Compare Services -
- Send Itinerary

	Section		Notes
3.	Service details		<ul style="list-style-type: none"> • <i>Each service on the reference will have its on section or box</i> • <i>Applicable action buttons such as change, cancel, etc. will appear for each service</i> • <i>Expand the details by pressing v button</i> • <i>All relevant information will show under each service section – ie. Ticketing deadlines for air, cancel policy information for hotel, vendor contact information for insurance, etc.</i> • <i>For Calendar view – each service will appear ONLY if it applies to that day</i> <ul style="list-style-type: none"> ○ <i>Use calendar day toggle to see each day</i> • <i>For service view – each service will be listed</i>

Round Trip Flights: Los Angeles - Rome Sam Smith

Sunday, June 12, 2022 - Sunday, June 19, 2022 Advisor: Anna Kulej

ADX Ref. 3E2TNF | Archive | Copy Quote | Link Bookings QUOTE

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

Trip Name: Round Trip Flights: Los Angeles - Rome
Dates: 06/12/2022 06/19/2022 Add details/notes

All Services View by:

- ✈ Round-Trip Los Angeles to Rome OFFERED
Jun 12, 2022 - Jun 19, 2022
Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules Book Remove
- ✈ Round-Trip Los Angeles to Rome OFFERED
Jun 12, 2022 - Jun 19, 2022
Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules Book Remove
- 🏰 Palazzo Naiado, Rome OFFERED
Jun 13, 2022 - Jun 18, 2022
Actions: Modify Book Remove

4. Reorder Services

Actions: Reorder Services

Estimated Quote
Potential Commission USD \$155.00 USD \$40.00
Add Insurance

Client Documents:
Insurance offered
Update

Add ADX Service - Add non-ADX Service - Compare Services - Send Itinerary

	Section		Notes
4.	<p>Reorder Services</p> <div data-bbox="296 342 722 716"> <p>REORDER SERVICES ✕</p> <p>Please drag-and-drop the services below to arrange the order in which you would like to have them displayed. This order will be reflected on any outgoing client documents.</p> <ul style="list-style-type: none"> ✈️ ROUND-TRIP LOS ANGELES TO ROME (1) JUN 12 - JUN 19 ✈️ ROUND-TRIP LOS ANGELES TO ROME (2) JUN 12 - JUN 19 🏨 PALAZZO NAIADO, ROME JUN 13 - JUN 18 <p>Upon saving, you will apply the current ordering to all days of the quote. Any previous quote-wide service ordering will be updated for the services listed above. Any existing day-specific order you may have saved takes precedence and will remain intact.</p> <p>Cancel Save Changes</p> </div>		

ADX Providers Clients Resources Bookings Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej

ADX Ref. 3E2TNF [Archive] Copy Quote Link Bookings

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

Trip Name Dates
 Round Trip Flights: Los Angeles - Rome 06/12/2022 06/19/2022 Add details/notes

All Services View by:

- Round-Trip Los Angeles to Rome Jun 12, 2022 - Jun 19, 2022 Book Remove
 Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules
- Round-Trip Los Angeles to Rome Jun 12, 2022 - Jun 19, 2022 Book Remove
 Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules
- Palazzo Naiado, Rome Jun 13, 2022 - Jun 18, 2022 Book Remove
 Actions: Modify

Actions: Reorder Services

Estimated Quote Potential Commission USD \$155.00 USD \$40.00 Add Insurance

Client Documents: Insurance offered Update

Add ADX Service Add non-ADX Service Compare Services Send Itinerary

5. Upsell Insurance

	Section	 Notes
5.	Reorder Services	<ul style="list-style-type: none"> • Add insurance to the trip • Update insurance offered communication in terms and conditions <ul style="list-style-type: none"> ○ Offered ○ Purchased ○ Offered and declined

2.2.3 Client and Travelers Tab

The client and travelers tab will host all information related to the client profile and the travelers assigned to the services. Refer to the Client Profiles section for more information.

The screenshot displays the ADX interface for managing a client and travelers for a specific trip. The top navigation bar includes 'Providers', 'Clients', and 'Resources'. The main header shows the trip details: 'Round Trip Flights: Los Angeles - Rome' for the dates 'Sunday, June 12, 2022 - Sunday, June 19, 2022'. The client is identified as 'Sam Smith' with an advisor 'Anna Kulej'. A search bar at the top right contains the name 'Anne Kulej'. Below the header, there are tabs for 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Client & Travelers' tab is active, showing 'CLIENT AND TRAVELERS INFO' with the client name 'Sam Smith' and phone number '5554445555'. A 'CONTACT INFORMATION FOR THIS TRIP' section provides instructions on data entry. Below this, a 'Traveler' section is shown for 'Mr. Sam Smith', born 'Mar 23, 1990'. This section includes a form with fields for 'TITLE' (Mr.), 'FIRST NAME' (Sam), 'MIDDLE NAME' (optional), 'LAST NAME' (Smith), 'GENDER' (Male), 'DATE OF BIRTH' (23 Mar 1990), 'NATIONALITY' (United States), 'PASSPORT NUMBER' (1111111), 'ISSUING COUNTRY' (United States), 'EXPIRY DATE' (2 Jan 2025), 'REDRESS NUMBER', and 'KNOWN TRAVELER NUMBER'. There is also a 'SAVE AS COMPANION' checkbox. At the bottom, there are fields for 'CONTACT EMAIL ADDRESS' and 'CONTACT PHONE NUMBER', and a 'SEATING PREFERENCE' and 'MEAL PREFERENCE' section. A 'FIND' button is located next to the traveler's name. The bottom of the interface features buttons for 'Add ADX Service', 'Add non-ADX Service', 'Compare Services', and 'Send Itinerary'.

Client and Travelers

a. Client assignment

b. Companion assignment

	Section		Notes
4.	Clients and Travelers		<ul style="list-style-type: none"> • <i>Assign Client and travelers to the trip</i> • <i>Create new client OR pull in existing client information</i> • <i>Assign companions as travelers to specific services</i> • <i>Manage and confirm travel information</i>
a.	Client assignment		<ul style="list-style-type: none"> • <i>Client can be pulled in from existing profile OR create new client</i>
b.	Companion Assignment		<ul style="list-style-type: none"> • <i>Assign travelers to a service</i> • <i>Pull existing companions by pressing the  button</i> • <i>Create new companions and save them under the client profile</i>

2.2.4 Payment Tab

The Payment Tab will show all action buttons as well as all financial information for the full trip.

The screenshot displays the ADX interface for a travel booking. The top navigation bar includes 'Providers', 'Clients', 'Resources', 'Bookings', and a search field. The main header shows 'Round Trip Flights: Los Angeles - Rome' with dates 'Sunday, June 12, 2022 - Sunday, June 19, 2022' and advisor 'Sam Smith'. Below the header is a navigation bar with tabs: 'Trip', 'Client & Travelers', 'Payment' (selected), 'Service Fees', and 'Manage'. A 'Refresh Quote' button is also present.

a. Cost Summary

Travel Service	Est. Commission	Taxes	Cost	
Round-Trip Los Angeles to Rome	USD \$0.00	USD \$1,092.54	USD \$2,492.54 UPDATE PRICE	Book
Round-Trip Los Angeles to Rome	USD \$0.00	USD \$1,022.96	USD \$2,422.96 UPDATE PRICE	Book
Palazzo Nalado, Rome	USD \$298.89	USD \$0.00	USD \$3,455.26	Book
Consultation Fee		USD \$0.00	USD \$150.00	Add
24/7 Support		USD \$0.00	USD \$60.00	Payment
Total	USD \$508.89	USD \$2,115.50	USD \$8,580.76	

b. Payment summary

Service	FOPs	Type	Due	Amount
24/7 Support		Balance		USD \$60.00
Total Owning				USD \$60.00

c. Invoices

No invoices present at this time.

At the bottom of the interface, there are buttons for 'Add ADX Service -', 'Add non-ADX Service -', 'Compare Services -', and 'Send Itinerary'.

	Section		Notes
a.	Cost Summary		<ul style="list-style-type: none"> • <i>List of all services added to the reference including total cost</i> • <i>Breakout of commission, taxes and cost per service</i> • <i>Book/pay buttons for each service</i>
b.	Payment Summary		<ul style="list-style-type: none"> • <i>See list of items with a balance owing</i>
c.	Invoices		<ul style="list-style-type: none"> • <i>Auto generated invoices for any service sold within ADX</i> • <i>Each travel ready service will contain its own invoice and invoice number</i> • <i>Refer to the Post Booking Management section for more information</i>

2.2.5 Service Fees Tab

The Service Fees tab will contain any default fees set up through the advisor profile page. You will also be able to create new fees that pertain to a specific itinerary. Refer to the Post Booking Management section for more information on fees.

The screenshot displays the ADX interface for a round trip flight from Los Angeles to Rome. The top navigation bar includes 'Partners', 'Clients', 'Resources', and 'Bookings'. The main header shows the trip details: 'Round Trip Flights: Los Angeles - Rome' for the dates 'Sunday, June 12, 2022 - Sunday, June 19, 2022'. The advisor is identified as 'Sam Smith' with the name 'Anna Kulej' and a 'QUOTE' button. Below the header is a navigation bar with tabs: 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Service Fees' tab is active, showing a 'Refresh Quote' button. On the left, a 'Service Fee Tab' label points to the navigation bar, and 'a. Fee types' points to the 'ADD A PLANNING FEE' section. 'b. Fee management' points to the 'Planning Fee' management area. The 'ADD A PLANNING FEE' section shows a 'Planning Fee' management card with a toggle switch set to 'Active' and a value of 'USD \$150.00'. A 'Create a new Planning Fee' link is also present. On the right, the 'FEE TYPES' section lists 'Planning Fee' (1 added, Selected), 'Change Fee', '24/7 Support Fee' (1 added), and 'Custom Fee', each with a 'Select' button. At the bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', 'Compare Services', and 'Send Itinerary'.

	Section		Notes
1.	Fee types		<ul style="list-style-type: none"> • Fees bucketed into three types: Planning fee, change fee, custom fee • Fees created in profile will show under the name of the fee • Manage the fee by making it active or inactive • Create new fees • Add 247 product • Review and send a planning fee agreement to your client • Review the Travel Edge suggested fee structure
2.	Fee management		<ul style="list-style-type: none"> • Make fees active/inactive • Use the v to expand the details and edit the fee information • Add multiples of the same type of fee

2.2.6 Manage Tab

Manage all notifications and communications related to the specific ADX reference. Itineraries with new notifications will display a red number in the corner of the tab. Set up your bon voyage and welcome home emails to send automatically before and after the trip commences.

Manage Tab — Trip Client & Travelers Payment Service Fees **Manage** Refresh Quote

a. Notifications — Notifications Create Notification Include Hidden
There are no notifications to display.

b. Sent Emails — Sent Emails
There are no emails to display.

c. Bon Voyage and Welcome Home emails — **Bon Voyage & Welcome Home Email Messages**

SEND BON VOYAGE AND WELCOME HOME EMAILS (these are sent out on trip departure and return dates)

SEND TO THE FOLLOWING EMAIL ADDRESSES
Enter a list of valid emails separated by commas

To personalize the Bon Voyage and Welcome Home greetings, please edit the message on composer on the right. You can update the standard greetings on your [My Profile](#) page.

Preview

Bon Voyage Welcome Home

EMAIL SUBJECT
Bon Voyage!

B I U [List Icons] [Align Icons] Normal Default [Link Icon]

Enjoy your trip!
If I can be of any further assistance before you travel, please do not hesitate to contact me. My email address and phone numbers can be found below.
Kind regards.

Add ADX Service - Add non-ADX Service - Compare Services - Send Itinerary

	Section		Notes
a)	Notifications		<ul style="list-style-type: none"> • <i>All vendor notifications will be stored in this section</i> • <i>Review, action and hide notifications</i> • <i>Create generic reminders for specific itineraries</i> • <i>A red number in the corner of the Manage tab indicates the number of unactioned messages for this itinerary</i>
b)	Sent emails		<ul style="list-style-type: none"> • <i>History of sent client documents out of ADX – client itinerary, comparison, invoice, client statement</i> • <i>Ability to view the sent email body and file attachments</i>
c)	Sent Emails		<ul style="list-style-type: none"> • <i>Review history of any support tickets opened from a specific reference</i>
d)	Bon Voyage and Welcome Home Emails		<ul style="list-style-type: none"> • <i>Opt-in to auto send these the day before and day after the trip</i> • <i>Customize the body of both emails</i>

1.3. PAYMENT PAGE

The Payment Page will be standard across all service types. The page allows you to select what services to process payment for in one batch. Once the credit card information is entered, each service checked will be processed individually and will generate one invoice per transaction. The payment page will allow you to add or manage added service fees. It will allow you to make quoted services payable to transact in one batch. The payment page will also let you select your insurance offerings that are reflected on the client itinerary Terms and Conditions section.

The screenshot shows the ADX payment interface for a flight booking. At the top, there are navigation links for 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a dropdown menu for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right. The main heading is 'One Way Flight: Los Angeles to London' with the dates 'Sunday, July 17, 2022 - Monday, July 18, 2022'. The advisor is 'sam smith' and 'Advisor: Anna Kulej'. The ADX reference is '100DNE' and a 'PART BOOKED' status is shown.

Below the header, there is a 'Credit Card' section with an '+ Add Payment Method' button. The main content is divided into three sections:

- SERVICES READY TO BE PAID**: A table with columns for service name, cost, and actions. It includes '24/7 Support' (USD \$60.00), 'Automatically Added fee' (USD \$100.00, non-refundable), and 'One-way Los Angeles to London' (USD \$872.30, July 17-18, 2022) with a 'Split Payment' link. A 'Total to be paid' of USD \$872.30 is shown.
- SERVICES REQUIRING ACTION**: A table with columns for service name, cost, and actions. It includes 'Nomad Hotel London' (GBP £585.00, July 17-18, 2022) with a 'Make Payable' link, and 'Suggested Planning Fee' (USD \$50.00) with an 'Add Fee' link. An 'Outstanding balance' of GBP £585.00 and USD \$50.00 is shown.
- INSURANCE OFFERINGS**: A section with a disclaimer and three radio button options: 'Insurance Offered', 'Insurance Purchased In ADX', and 'Insurance Offered and Declined'. The 'Insurance Offered and Declined' option is selected.

Splitting credit card

Selecting services to be paid

Services requiring action

Insurance Offering

Payment Details

Terms and Conditions

Process payment

The screenshot displays the ADP client portal interface for a flight booking. At the top, there are navigation links for 'Partners', 'Clients', and 'Resources'. The main heading is 'One Way Flight: Los Angeles to London' for the dates Sunday, July 17, 2022, to Monday, July 18, 2022. The user is identified as 'sam smith' with the address 'Advisor: Anna Kaley'. Below this, there are buttons for 'Credit Card' and 'Add Payment Method'. The 'SERVICES READY TO BE PAID' section includes a table with columns for service name and cost. The 'SERVICES REQUIRING ACTION' section includes a table with columns for service name and cost. The 'INSURANCE OFFERING' section contains several radio button options for insurance coverage. The 'PAYMENT DETAILS' section includes a form for entering credit card information, including card number, name, address, and expiration date. At the bottom, there are links for 'Back to Trip Services' and 'Add and Manage Client Details', and a 'Pay and Book' button.

SERVICES READY TO BE PAID	COST
<input type="checkbox"/> 24/7 Support	USD 862.00
<input type="checkbox"/> Automatically Add Fee <small>See it on itinerary</small>	USD 1,000.00
<input checked="" type="checkbox"/> One way Los Angeles to London <small>Jul 17, 2022 - Jul 18, 2022</small>	USD 842.00 Split Payment
Add a service fee	
Total to be paid:	USD 842.00

SERVICES REQUIRING ACTION	COST
<input type="checkbox"/> Normal Hotel London <small>Jul 17, 2022 - Jul 18, 2022</small>	GBP 625.00 Make Payment
Suggested Planning Fee	USD 950.00 Add Fee
Outstanding balance:	GBP 625.00 USD 898.00

INSURANCE OFFERING
As some jurisdictions require travel insurance to be offered to all clients, ADP includes messaging on all client documents about any insurance products that have been sold or declined. If insurance has been sold through ADP documents, will automatically reflect this detail.

Insurance Offered
Use this option when you have sent a quote for travel insurance to your client, and they have not responded yet.

Insurance Purchased in ADP
This option is only available when insurance has been sold or invoiced via ADP. Return to the Trip Services Page to quote & sell insurance using ADP or add an external invoice for an insurance product sold outside of ADP and this option will be automatically selected.

Insurance Purchased
Use this option if you have sold insurance to your client and have not invoiced through ADP. Please provide the name of the insurance product or policy.

Insurance Offered and Declined
Choose this option if you have offered your client travel insurance and they have chosen not to purchase a policy through you. Also use this option if your client has purchased an insurance policy themselves.

PAYMENT DETAILS

CREDIT CARD

Invoice amount: USD 842.00

ADDRESS:

Customer:

CARDHOLDER NAME: First Name Last Name

CARD NUMBER:

EXPIRES: /

CVV:

CREDIT CARD:

Terms & Conditions

The Payment Details section above requires that you collect and enter your client's confidential and personal information, including the client's residential address, credit card number, expiration date and verification number. You acknowledge and agree that you have obtained the consent of your client to collect and enter this information for the sole purpose of booking the product or service above, and that you will not use this information for any other purpose. Once you enter the information above, you will not store or retain the information. You are solely responsible for verifying that your client is providing you with their credit card information and not credit card information that the client is not authorized to use.

[Back to Trip Services](#) I want to see the Terms and Conditions [Pay and Book](#)

	Section		Notes
	Splitting credit card		<ul style="list-style-type: none"> • Split credit cards available for AIR on multiple ticket itineraries • Split credit cards by service • Add payment method tab for each credit card used
	Selecting services to be paid		<ul style="list-style-type: none"> • Check box to be added to payment process • Uncheck box to remove it from being added to payment process • Will show only payable status services
	Services requiring action		<ul style="list-style-type: none"> • Add service fees that are suggested – not active • Make sellable services payable and available to be added to payment process
	Insurance Offering		<ul style="list-style-type: none"> • Offering type will be added to terms and conditions on client itinerary • Sold in ADX will automatically be selected when sold policy through ADX • Manually add information OR select declined
	Payment details		<ul style="list-style-type: none"> • Manually enter credit card information • CC information is not pulled or stored anywhere
	Terms and Conditions		<ul style="list-style-type: none"> • Read and verify the terms before processing credit card payment
	Process payment		<ul style="list-style-type: none"> • Button will process all payment of services selected in services to be paid section • Each payment will process individually and produce a individual invoice