



Quick Guide -  
Communication Profile  
June 2022

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## 1.1. COMMUNICATION PROFILE

The communication profile page will allow customization of content appearing on the itinerary such as advisor signature, default notes and branding and logos. Set your public Travel Edge profile to be visible on the Travel Edge website. It also will store advisor hotel loyalty numbers. **To expand a section, press the v on the right side**

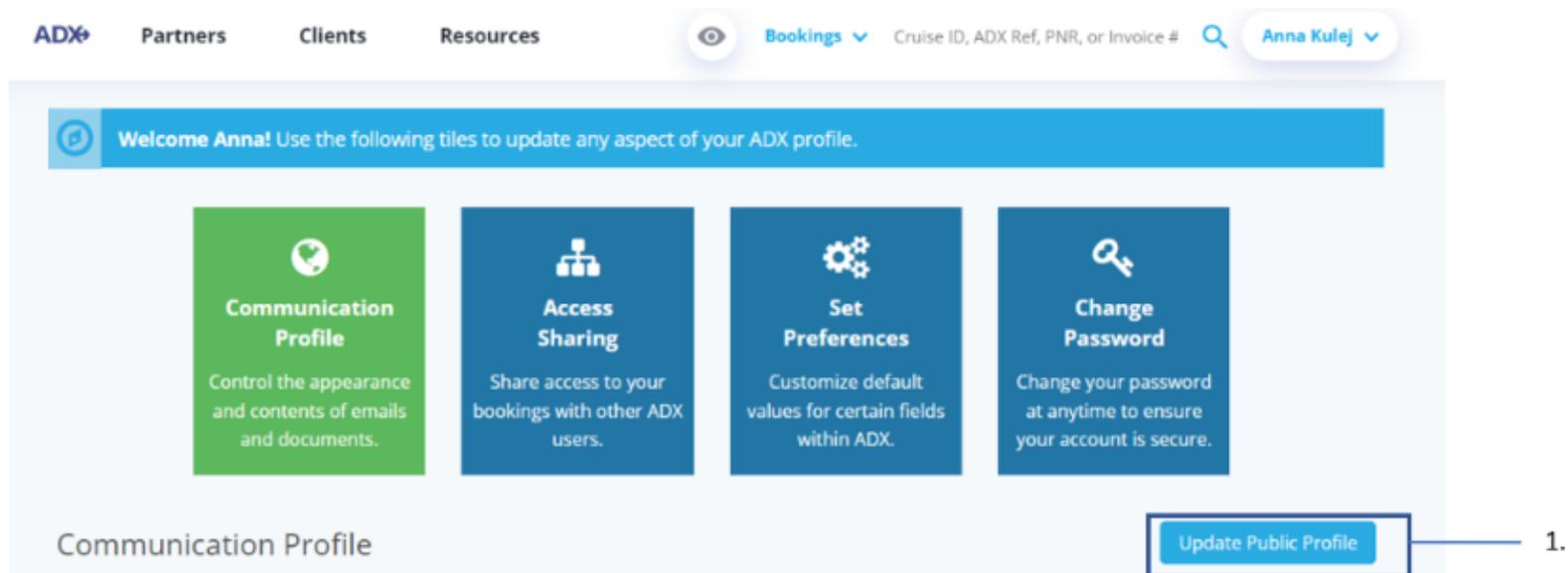
The screenshot displays the ADX user interface. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. The left sidebar contains tiles for 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. The main content area features a 'Welcome Anna!' message and four tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Communication Profile' tile is highlighted with a blue box. Below the tiles, the 'Communication Profile' section is expanded, showing a list of settings with dropdown arrows on the right side:

- Specify Your Address and Upload Your Portrait
- Brand Settings
- Upload Your Logos
- Define Standard Notes for Inclusion in Client Itineraries
- Define Standard Service Descriptions for Planning Fee Agreements
- Customize Body Text of Itinerary Emails
- Define Your Email Signature Block
- Customize Body Text of Bon Voyage and Welcome Home Emails
- Set Advisor Loyalty Number for Hotels

At the bottom of the page, the footer reads 'ADX Copyright TravelEdge 2022 - All Rights Reserved. Version: 7.19.9.13'.

### 1.1.1 Update Public Profile

Create an advisor profile showcasing who you are, your expertise, awards and reviews and be searchable on the Travel Edge website, [advisor page](#). Once you fill in the details make sure you make your profile active. Updates to the profile may take up to 24 hours to appear on the website.



	Steps		Notes
1.	Click Update Public Profile		<ul style="list-style-type: none"><li>• Located on the right side</li></ul>

ADP Partners Clients Resources Bookings Client ID: ADP Ref: PIR, or Invoice # Anna Kulec

Use this page to update your public profile, displayed on the Travel Edge website.  
Please note that the Travel Edge website is updated daily so changes may take up to 24 hours to appear.

SHOW MY PROFILE ON TRAVEL EDGE WEBSITE

1. —————

2. —————

3. —————

4. —————

5. —————

6. —————

7. —————

8. —————

UPDATE IMAGE  
Choose File No file chosen  
Image should be square and at least 200x200 px in size.

NAME SUFFIX \* [Update](#)

DESTINATIONS \* [Update](#)  
NZLL, New Zealand

SPECIALTIES \* [Update](#)  
Golf

LANGUAGES \* [Update](#)  
English

AWARDS  
 CONDÉ NAST TRAVELLER TRAVEL SPECIALIST  
 ASTA TRAVEL AGENT OF THE YEAR  
 LUXURY TRAVEL ADVISOR AWARDS OF EXCELLENCE  
 TRAVEL AND LEISURE A-LIST TRAVEL ADVISOR  
 TRAVEL WISDOM READER'S CHOICE AWARDS  
 Please note: awards will be validated before appearing on TravelEdge.com

FIRST NAME \* Anna  
MIDDLE NAME  
LAST NAME \* Kulec

PHONE \* 416-649-9053  
EMAIL \* anna.kulec@traveledge.com

JOB TITLE/AGENCY NAME \* Advisor  
CITY \* New York, NY

BIOGRAPHY HEADLINE

BIOGRAPHY \*  
 B I U

What started out as a keen desire to plan and organize, turned into a full-time career of creating beautifully crafted memories for my friends, family and clients.

WEBSITE URL  SELLING TRAVEL STATES

FACEDBOOK URL  TWITTER URL

LINKEDIN URL  INSTAGRAM URL

[Add Review](#)

**Reviews & Recommendations**

What an amazing time we had!  
By Sarah Smith - posted on Aug 11, 2021 - travel date Aug 20, 2021 [Edit Review](#)

[Save Changes](#)

	Steps	 Notes
1.	Check box to make profile public	<ul style="list-style-type: none"> <li>• Check the “Make Public” checkbox for the profile to be active</li> <li>• Profile will NOT show on the Travel Edge website if this is not checked</li> <li>• Updates may take 24 hours to appear</li> <li>• Website: <a href="https://www.traveledge.com/our-advisors">https://www.traveledge.com/our-advisors</a></li> </ul>
2.	Fill in contact details	<ul style="list-style-type: none"> <li>• Mandatory fields marked with *</li> </ul>
3.	Upload profile image and banner image	<ul style="list-style-type: none"> <li>• Banner image is mandatory</li> <li>• Banner image appears at the top of the TE profile page as a highlighted image</li> </ul>
4.	Enter a bio and bio headline	<ul style="list-style-type: none"> <li>• Biography is mandatory</li> </ul>
5.	Add specialty information	<ul style="list-style-type: none"> <li>• Highlight destinations you specialize in</li> <li>• Enter specialties you service</li> <li>• Enter languages you service</li> <li>• Highlight awards and accolades you’ve received</li> </ul>
6.	Add social media links	<ul style="list-style-type: none"> <li>•</li> </ul>
7.	Add reviews and client recommendations	<ul style="list-style-type: none"> <li>• Multiple entries permitted</li> </ul>
8.	Save changes	<ul style="list-style-type: none"> <li>• Updates may take up to 24 hours to appear</li> </ul>

### 1.1.2 Specify Address and Upload Portrait

Your default profile will automatically populate based on the office you are associated with. Your communication profile is what will show on the client itinerary. As an IC you can update all information in your communication profile EXCEPT for your email address.

## Communication Profile Update Public Profile

Welcome to your communications profile. On this tab you can control the appearance and contents of emails and documents that your clients will receive from you via ADX.

Please click on the headings below to update the various communication profile items.

### Specify Your Address and Upload Your Portrait

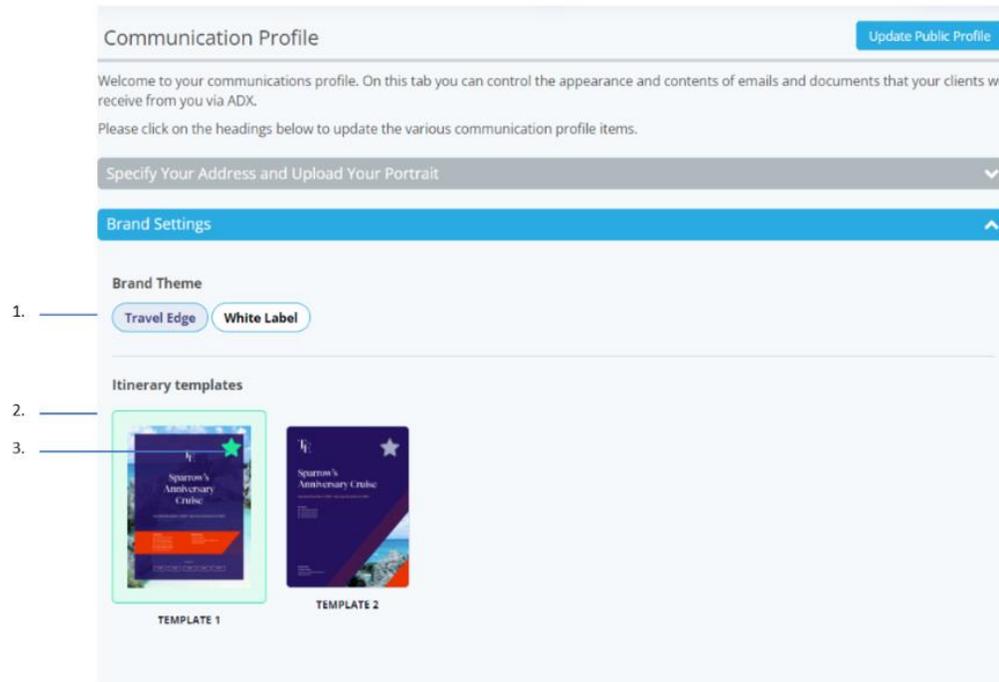
When ADX generates a PDF itinerary, invoice or "compare" table for sending to your clients, there is a section that contains information about you, the advisor. If you would like your address to appear different than your default branch address on client documents, please specify the details below.

**Note - if you are an "inside advisor"/employee, you will not be able to change your email address.**

	<b>Default Profile</b>	<b>Communication Profile</b>
<a href="#">Delete</a>   <a href="#">Change</a>	<b>Name</b> Anna Kulej	<b>Name</b> Anna Kulej
	<b>Company</b> TravelEdge Dev	<b>Company</b> <input type="text" value="Anna's Travel"/>
	<b>Email</b> anna.kulej@traveledge.com	<b>Email</b> anna.kulej@traveledge.com
	<b>Phone</b> 1-800-387-2977	<b>Phone</b> <input type="text" value="1-800-387-2977"/>
	<b>Mobile</b>	<b>Mobile</b> <input type="text"/>
	<b>Fax</b>	<b>Fax</b> <input type="text"/>
	<b>Address</b> Schattau 1 Russbach, Devonshire, 5442, Bermuda	<b>Address</b> ADDRESS <input type="text" value="2786 MILWAUKEE RD"/> <input type="text" value="Address Line 2"/> CITY <input type="text" value="Beloit"/> COUNTRY <input type="text" value="United States"/> <span>▼</span> STATE/PROVINCE <input type="text" value="Alabama"/> <span>▼</span> ZIP/POSTAL CODE <input type="text" value="53511"/>
		<span>Save Profile Changes</span>

### 1.1.3 Brand Settings

The itinerary brand settings allow you choose from two different types of cover letters: **TE branded and White Labeled**  
 The Travel Edge theme showcases the TE colors on the cover page whereas the White Label theme has a white background.



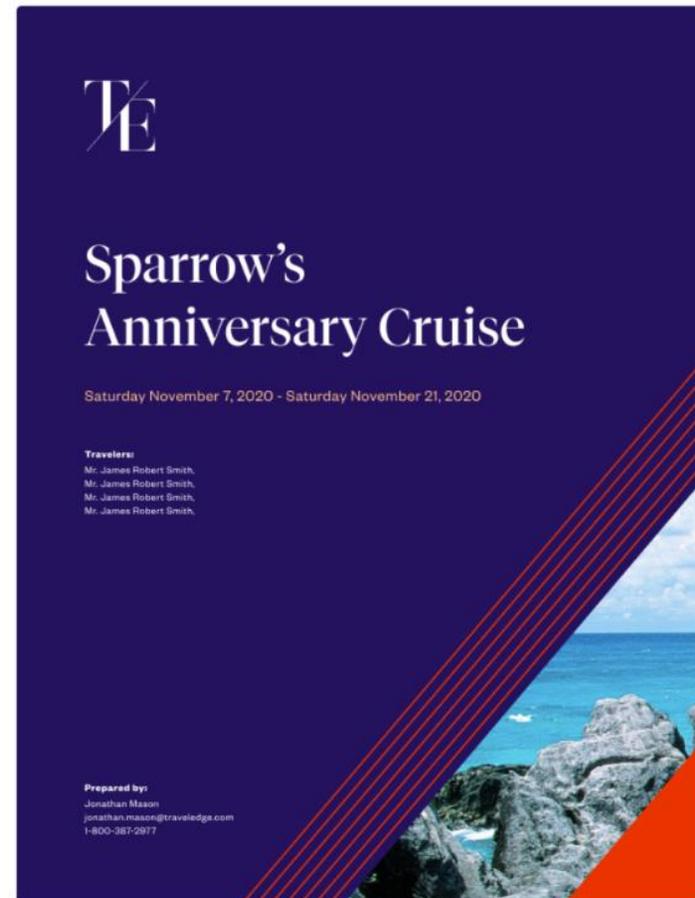
☰	Section	✍️	Notes
1.	Click on brand theme to select	•	<i>Toggle between the Travel Edge and the White Label brand themes</i>
2.	Click on template to review	•	<i>Enlarge image to review</i>
3.	Click star in corner to select	•	<i>This will set the default for the itinerary</i>

## Travel Edge Templates

Template 1



Template 2



# White Label Templates

Template 1



**Sparrow's  
Anniversary Cruise**

Sat Novr 7, 2020 - Sun Nov 21, 2020

**Travelers:**  
Mr. James Robert Smith, Ms. Alida McLocking

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com, 1-800-387-2977

× Template 2



**Sparrow's  
Anniversary Cruise**

Saturday November 7, 2020 - Saturday November 21, 2020

**Travelers:**  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com  
1-800-387-2977

× Template 3



**Sparrow's  
Anniversary Cruise**

Saturday November 7, 2020 - Saturday November 21, 2020

**Travelers:**  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com  
1-800-387-2977

### 1.1.4 Upload Your Logo

Your logo can be uploaded and used in three different ways on the client itinerary:

- On the title page
- On the footer of each page
- On the invoice and comparison documents

Brand Settings

Upload Your Logos

ADX provides you with the ability to customize all of the documents you send to clients with your own logos. Below you will find three different upload sections relating to specific parts of the customer experience. Each of these sections allows you to upload a logo with proportions that will optimize the visual experience for yourself and your clients.

**Upload your title page logo**

This is the logo for the title page of the client itinerary. Please provide an image with a height of at least 50 pixels and no more than 600 pixels. The width should be no larger than 600 pixels, it will scale vertically and then center horizontally. The recommended size for the picture is a height of 85 pixels with a width of 85 pixels. The image size limit is 200 KB. The recommended image format is .png, .bmp or .gif to support the transparent background functionality on the title page. Please contact ADX support if your image is not displaying as expected or contact advisor services if you need additional assistance.

+ Choose File No file chosen

**Upload your footer logo**

This is the logo for the footer of the client itinerary. Please provide an image with a height of at least 25 pixels and no more than 600 pixels. The width should be no larger than 970 pixels, it will scale vertically and then center horizontally. The recommended size for the picture is a height of 50 pixels with a width of 200 pixels. The image size limit is 200 KB. Please contact ADX support if your image is not displaying as expected or contact advisor services if you need additional assistance.

+ Choose File No file chosen

**Upload your invoice/compare logo**

When ADX generates an invoice or "compare" table for sending to your clients, a logo is included. You can create a personalized logo and upload it to ADX. It will appear on any PDF generated after it has been uploaded. Please just be sure to follow the image guidelines: Height of 180 pixels is highly recommended for best quality. Maximum Width is 970 pixels and recommended width is 600 pixels. The maximum file size is 200KB.



+ Choose File No file chosen

Remove Logo

When uploading files be sure to **check the requirements for each logo type** to ensure it will look proper on the client document.

### Upload your title page logo

This is the logo for the title page of the client itinerary. Please provide an image with a width of 600 pixels, it will scale vertically and then horizontally to a height of 85 pixels with a width of 85 pixels. The image size limit is 200 KB. The image will have a transparent background functionality on the title page. Please contact ADX support services if you need additional assistance.

1.   No file chosen

### Upload your footer logo

This is the logo for the footer of the client itinerary. Please provide an image with a width of 970 pixels, it will scale vertically and then horizontally to a height of 50 pixels with a width of 200 pixels. The image size limit is 200 KB. Please contact advisor services if you need additional assistance.

2.   No file chosen

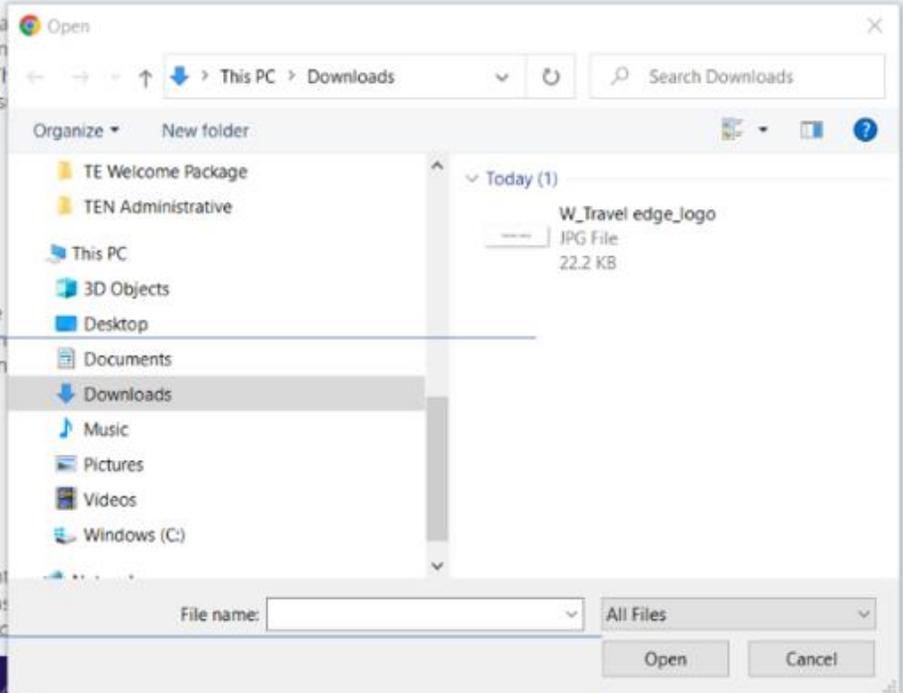
### Upload your invoice/compare logo

When ADX generates an invoice or "compare" table for sending to your client, it will appear on any PDF generated after it has been uploaded. Please provide an image with a width of 970 pixels, it will scale vertically and then horizontally to a height of 50 pixels with a width of 200 pixels. The image size limit is 200 KB. Please contact advisor services if you need additional assistance. **Highly recommended for best quality. Maximum Width is 970 pixels and recommended height is 50 pixels.**

3.   No file chosen



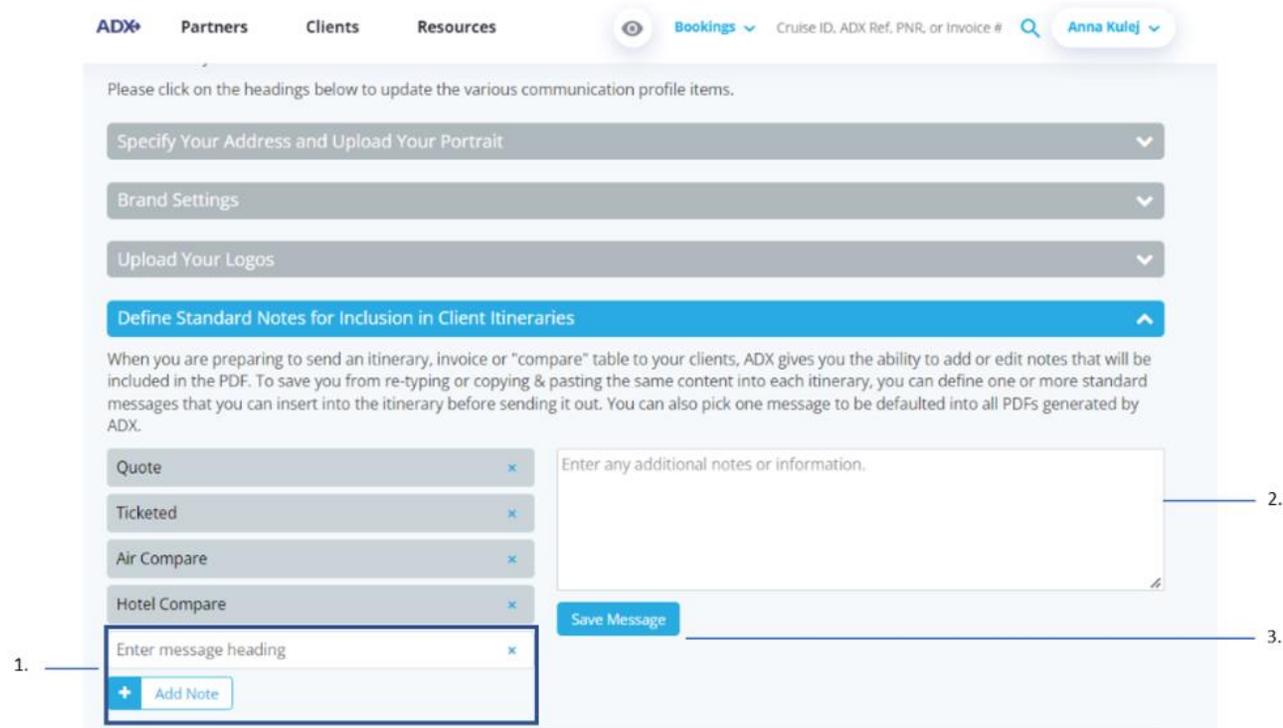
No file chosen



	Steps		Notes
1.	Click CHOOSE FILE on the logo type		<ul style="list-style-type: none"> <li>• <i>Select from title page, footer, invoice/compare</i></li> <li>• <i>Maximum file size 200 mb</i></li> <li>• <i>Check the min-max height size requirement</i></li> <li>• <i>Check the width min-max size requirement</i></li> <li>• <i>Recommended:</i> <ul style="list-style-type: none"> <li>○ <i>For title logo – 85h x 85w pixels</i></li> <li>○ <i>For footer logo - 50h x 200w pixels</i></li> <li>○ <i>For invoice – 180h x 600w pixels</i></li> </ul> </li> </ul>
2.	Locate the file on your computer		<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press OPEN		<ul style="list-style-type: none"> <li>• <i>This will attach the file to the logo selected</i></li> <li>• <i>If file does not meet requirements an error will appear and file will not attach</i></li> </ul>

### 1.1.5 Define Standard Notes for Inclusion in Client Itineraries

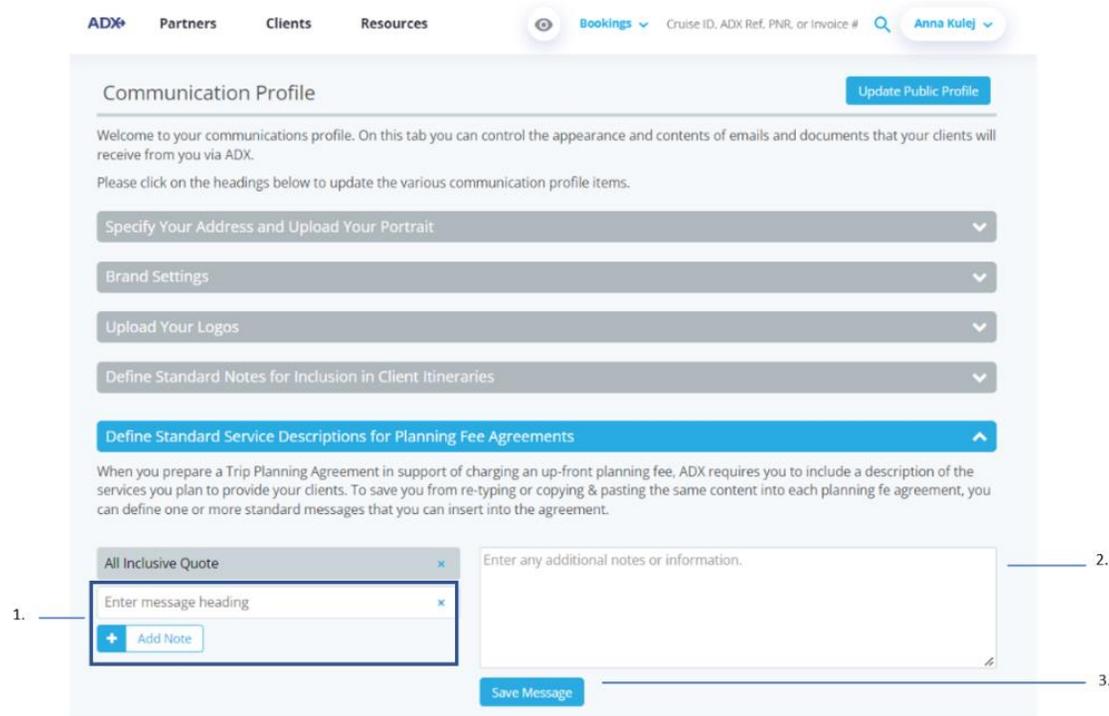
Create predefined notes in your profile to quickly add messaging to your client itineraries. You can create unlimited notes in your profile.



	Steps	 Notes
1.	Press ADD NOTE to create a new note and heading	<ul style="list-style-type: none"> <li>• <i>Heading will appear in list</i></li> </ul>
2.	Enter verbiage to appear in note	<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press SAVE MESSAGE	<ul style="list-style-type: none"> <li>• <i>Note will be saved on profile</i></li> <li>• <i>Note will appear on client itinerary page and be available to be added</i></li> </ul>

### 1.1.6 Define Description for Planning Fee Agreement

Create predefined notes in your profile to quickly add messaging to your planning fee agreements. You can create unlimited notes in your profile.



	Steps	 Notes
1.	Press ADD NOTE to create a new note and heading	<ul style="list-style-type: none"> <li>• <i>Heading will appear in list</i></li> </ul>
2.	Enter verbiage to appear in note	<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press SAVE MESSAGE	<ul style="list-style-type: none"> <li>• <i>Note will be saved on profile</i></li> <li>• <i>Note will appear on planning fee agreement page and be available to be added</i></li> </ul>



### 1.1.8 Define Your Email Signature

Customize the signature that appears in the body of all emails sent out of ADX.

The screenshot shows the ADX system interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar with the user name 'Anna Kulej'. Below the navigation, there is a list of configuration options, each with a dropdown arrow. The options are: 'Upload Your Logos', 'Define Standard Notes for Inclusion in Client Itineraries', 'Define Standard Service Descriptions for Planning Fee Agreements', 'Customize Body Text of Itinerary Emails', and 'Define Your Email Signature Block'. The 'Define Your Email Signature Block' option is highlighted in blue and has an upward arrow. Below this option, there is a text area with the following content: 'When you send an itinerary, invoice, client statement, planning fee agreement or "compare" table via ADX, it will be attached to an email as a PDF document. We have provided a simple default email signature for you. If you would like to include additional information in your email signature, please provide the information below.' Below the text area, there is a section titled 'EMAIL SIGNATURE (APPLIES TO ALL TEMPLATES):' followed by a rich text editor. The rich text editor has a toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, and Unlink. The text in the editor is: 'Anna Smith', 'Office : 714-540-7400', 'Fax : 714-979-6040', 'Email : Anna.Smith@AnnaTravel.com', '2 Queen St E', 'Toronto, California 54323', and 'United States'. At the bottom right of the page, there is a blue button labeled 'Save Email Signature'.

### 1.1.9 Customize Bon Voyage and Welcome Home Emails

Bon Voyage and Welcome Home emails can be opted in on each individual trip page. Set up defaults to automatically pull in the messaging every time. When opted in, these messages will go out the day before the trip start date and the day after the trip end date, based on the service dates of one full ADX reference.

The screenshot shows the ADX system interface for customizing email templates. At the top, there are navigation tabs: ADX, Partners, Clients, and Resources. A search bar contains the text "Bookings" and "Cruise ID, ADX Ref, PNR, or Invoice #". A user profile dropdown shows "Anna Kulej".

The main content area is titled "Customize Body Text of Itinerary Emails" and "Define Your Email Signature Block". The active section is "Customize Body Text of Bon Voyage and Welcome Home Emails".

Below the title, there is a paragraph: "You can set ADX to automatically send your clients Bon Voyage and Welcome Home emails before/after they travel. We have provided default wording for these emails, but you can customize the text below if you prefer." A note follows: "Note - ADX will use the email signature you have defined above so no need to put your name and contact information in the default text of this message."

The interface is split into two columns. The left column contains a preview of the email template. The right column contains the editing area.

**Preview:**

You have the option of automatically sending clients well wishes on their trip departure and return dates.

To customize these standard greetings, please edit the information on the right. You will be able to tailor them for each client, if desired, on their trip quote page.

**BON VOYAGE**

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.

Anna Smith

**Editing Area:**

Buttons: Bon Voyage (selected), Welcome Home

EMAIL SUBJECT: Bon Voyage!

Rich text editor toolbar: B, I, Ix, bulleted list, numbered list, link, unlink, image, video, Font, Size

Text: 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.  
Anna Smith

Bottom: Preview,  USE DEFAULT, Save

### 1.1.10 Set Advisor Loyalty Number for Hotels

Advisors can save their **advisor hotel program loyalty numbers** for Hyatt, Four Seasons and Fairmont in their profile. When booking with any of these programs, ADX will automatically send the advisor number to the hotel to recognize the booking accordingly.

1. ———

2. ———

3. ———

4. ———

	<b>Steps</b>		<b>Notes</b>
1.	Select the hotel chain program		<ul style="list-style-type: none"> <li>• Available to select from Hyatt, Four Seasons, Fairmont</li> </ul>
2.	Enter loyalty number		<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press ADD		<ul style="list-style-type: none"> <li>•</li> </ul>
4.	Review loyalty numbers on the profile		<ul style="list-style-type: none"> <li>• Edit to change any information</li> <li>• Delete to remove a loyalty number</li> </ul>