



Quick Guide -
Access Sharing
June 2022

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1.1. ACCESS SHARING

ADX accounts are set up to be shareable with other advisors within the same office. Advisor can choose the level of visibility of client and data information they are comfortable with. Advisors cannot share content with anyone outside of their assigned office.

To protect advisor privacy, ADX defaults to **NOT** sharing clients and booking information. Advisors will need to go into their profile page and set the permissions to the sharing level manually.

There are three levels of permissions in ADX: **not shared, shared with other advisors within their branch, delegations.**

The screenshot shows the ADX user profile page for Anna Kulej. The navigation bar includes 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. The main content area features a welcome message and four tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Access Sharing' section is expanded, showing 'Client Sharing Status for Independent Contractors' with a status of 'Not Shared' and three buttons: 'Share access with inside advisors' and 'Share access with inside advisors and ICs'. Below this is the 'Delegation to specific advisors' section with a form to add new delegations. The 'EXISTING DELEGATIONS' table shows one delegation for Norah Rahamim, set to 'Indefinitely'.

| Advisor | Start Date | End Date |
|---------------|--------------|--------------|
| Norah Rahamim | Indefinitely | Indefinitely |

1.2.1 Set Access Permissions

Set client sharing permissions by selecting the desired status. Shared accounts will be able to see and access client information as well as ADX quotes and bookings. Access can be changed at any time.

- **Not Shared** – Nobody except manager
- **Share access with inside advisors** – Only internal employees and managers
- **Share with Inside Advisors and IC's** – All branch employees, ICs, and managers

ADX Partners Clients Resources Bookings Cruise ID, ADX Ref, PNR, or invoice # Anna Kulej

Welcome Anna! Use the following tiles to update any aspect of your ADX profile.

- Communication Profile**
Control the appearance and contents of emails and documents.
- Access Sharing**
Share access to your bookings with other ADX users.
- Set Preferences**
Customize default values for certain fields within ADX.
- Change Password**
Change your password anytime to ensure your account is secure.

Access Sharing

Client Sharing Status for Independent Contractors

I acknowledge that by clicking either of the buttons at right that I willingly share access to my client information and client itineraries with "inside advisors" (employees) of the Branch to which I am affiliated, or with "inside advisors" and "Independent contractors" (ICs) of the Branch to which I am affiliated for the purpose of providing seamless service to my clients, and that I may revoke shared access to my client information and client itineraries at any time by revisiting this page.

Status:

Delegation to specific advisors

ADVISOR INDEFINITELY SPECIFIC DATES TO

EXISTING DELEGATIONS

| Advisor | Start Date | End Date |
|---------------|--------------|--------------|
| Norah Rahamim | Indefinitely | Indefinitely |

When sharing permissions are set to SHARED, **your quotes/bookings and client profiles will be visible to your colleagues associated with your branch.**

The screenshot shows the ADX dashboard with a navigation bar at the top containing 'Partners', 'Clients', 'Resources', and 'Bookings'. Below the navigation bar are several tool icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. The main content area is titled 'MY QUOTES & BOOKINGS' and contains a table with the following columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. The 'ADVISOR' column is highlighted with a blue box. The table contains several rows of quote data, including 'Travel Select Plan Quote' and 'Courtyard ATL Marietta I-75'.

Quotes and Bookings – Agent column will indicate the primary owner of that quote. You will be able to see and access all quotes/bookings that are shared

The screenshot shows a 'CLIENT SEARCH RESULTS' window with a table of client information. The table has columns for Client, Email, Phone, and Agent. The 'Agent' column is highlighted with a blue box. The table contains several rows of client data, including 'Mr. Smith, Sarah', 'Mr. Smith, Sam', and 'Mrs. Smith, Sam'. Each row has a 'View' button next to the Agent name.

Clients – Agent column will indicate the primary owner of that client. You will be able to access client profiles and attach these clients to your bookings.

1.2.2 Setting Delegations

Delegates are advisors who have full shared access to another advisors' ADX account (i.e., clients and bookings). Delegates can/will:

- access all bookings and clients without needing the primary advisors ADX password
- modify and action all items for the other advisor
- receive all notifications relating to the primary advisors' itineraries.
- receive all the primary advisors' notifications and will be able to action on their behalf.

Welcome Anna! Use the following tiles to update any aspect of your ADX profile.

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Share access to your bookings with other ADX users.
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Customize default values for certain fields within ADX.
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Change your password at anytime to ensure your account is secure.

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Status:

Delegation to specific advisors

1. — ADVISOR INDEFINITELY SPECIFIC DATES TO 3.

2. —

EXISTING DELEGATIONS

| Advisor | Start Date | End Date | |
|---------------|--------------|--------------|-------------------------------------------|
| Norah Rahamim | Indefinitely | Indefinitely | <input type="button" value="End/Cancel"/> |

|  | Steps |  | Notes |
|-----------------------------------------------------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Search by first or last name | | <ul style="list-style-type: none"> • <i>Find advisor name</i> • <i>Advisor must be associated with the same office</i> |
| 2. | Specify identify dates of sharing | | <ul style="list-style-type: none"> • <i>Set indefinite access with no end date</i> • <i>Set specific date frame for start and end</i> |
| 3. | Press ADD | | <ul style="list-style-type: none"> • <i>Once delegate is saved they will appear in the existing delegations box</i> |

1.2.3 Removing delegations

Delegation access can be removed by the advisor at any point regardless of the time parameters set. To remove the delegation access press End/Cancel on the existing delegation's section.

The screenshot shows the ADX user profile management interface. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. A welcome message for 'Anna Kulej' is displayed. Below this are four main action tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Access Sharing' section is expanded, showing 'Client Sharing Status for Independent Contractors' with a status of 'Not Shared' and buttons to 'Share access with inside advisors' and 'Share access with inside advisors and ICs'. Below this is the 'Delegation to specific advisors' section with input fields for 'ADVISOR' and 'TO', and radio buttons for 'INDEFINITELY' and 'SPECIFIC DATES'. At the bottom, the 'EXISTING DELEGATIONS' table is highlighted with a red box.

| Advisor | Start Date | End Date | |
|---------------|--------------|--------------|----------------------------|
| Norah Rahamim | Indefinitely | Indefinitely | End/Cancel |

1.2.4 Accessing Delegate Bookings

Once delegations are set in the primary advisor profile, delegates will have access to all quotes and bookings of the primary advisor via the dashboard. The delegate will receive all notifications that pertain to any bookings made by the primary advisor and will be able to action on their behalf.

Changing the view on the main dashboard will allow advisors to go between different accounts **without having to share passwords.**

The screenshot shows the ADX dashboard interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar. Below these are several tool icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A dropdown menu for 'USING ADX AS:' is open, showing options: ME (checked), NORAH RAHAMIM, and ALL. Below the menu is a section for 'MY QUOTES & BOOKINGS' with a filter for 'Advisors: Me'. A table lists various quotes with columns for STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. A blue box highlights the 'ADVISOR' column in the table.

| STATUS | ADVISOR | CLIENT | QUOTE NAME | DEPART | SERVICES | UPDATED | View |
|------------|---------|-------------|----------------------------------------------------|----------|----------|----------|------|
| QUOTE | AK | Sarah Smith | Deluxe Travel Protection Plan Quote | 05.15.22 | ✈️🛡️ | 04.29.22 | View |
| QUOTE | AK | | Cour Des Vosges - 4 nights | 05.23.22 | 🏠🛡️ | 04.28.22 | View |
| QUOTE | AK | Sarah Smith | Multiple Air Services | 10.16.22 | ✈️🛡️ | 04.27.22 | View |
| QUOTE | AK | | Multi-City Flight: Los Angeles - New York - Boston | 05.15.22 | ✈️🛡️ | 01.20.22 | View |
| QUOTE | AK | | Celebrity Constellation | 01.13.23 | 🚢🛡️ | 01.18.22 | View |
| QUOTE | AK | | AmaSiena | 08.25.22 | 🚢🛡️ | 01.18.22 | View |
| ACTION REQ | AK | Sam smith | COURTYARD SEDONA MARIOTT | 01.24.22 | 🚗🛡️ | 01.13.22 | View |
| QUOTE | AK | | Welcome to the NEW Client Itinerary | 01.25.22 | ✈️🛡️ | 01.12.22 | View |

|  | Steps |  | Notes |
|-----------------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Press V button on USING ADX AS section | | <ul style="list-style-type: none"> • <i>Located on main dashboard</i> • <i>Will show list of agents who have set you as a delegate</i> |
| 2. | Select checkbox next to name in drop down | | <ul style="list-style-type: none"> • <i>Delegating advisor must add advisor in their profile before this shows up in your list</i> • <i>Select ALL to see everyone who has delegated to you</i> |
| 3. | View delegating advisor's bookings | | <ul style="list-style-type: none"> • <i>Changing USING ADX AS will change the view on the dashboard</i> • <i>The ADVISOR column will show initials of primary owner of the reference</i> |

1.2.5 Creating Quotes on Behalf Of

Once delegations are set in the primary advisor profile, quotes can be **created on behalf of other advisors**. **Quote owner needs to be changed at the time of creating the quote**. Changes after the quote is created would require ADX and finance team assistance. Quote owner can be changed for all modules offered in ADX.

The screenshot displays the ADX user interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right. Below the navigation is a row of seven module buttons: ITINERARY BUILDER, AIR, HOTEL (highlighted in green), ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A line labeled '1.' points to this row.

Below the modules is the 'NEW HOTEL SEARCH' section. It contains a 'HOTEL SEARCH' form with a search bar and a 'SEARCH BY' dropdown set to 'Destination'. A line labeled '2.' points to the search bar. Below the search bar are fields for 'CHECK IN DATE' (05/03/2022), 'CHECK OUT DATE' (05/04/2022), 'NIGHTS' (1), and 'ROOMS' (1 ROOM, 2 ADULTS). Below these are 'HOTEL CHAINS (OPTIONAL / MAX 3)' with an 'Include' radio button selected and a search field.

At the bottom of the form is the 'QUOTE OWNER' dropdown menu, which is open and shows a list of names: Anna Kulej (highlighted), Anna Kulej, and Norah Rahamim. A line labeled '3.' points to this dropdown. To the right of the dropdown is a 'CURRENCY' dropdown set to '\$USD'. At the bottom right of the form are buttons for 'Save for Later' and 'Search', and a link for 'View Saved and Previous Searches'.

|  | Steps |  | Notes |
|-----------------------------------------------------------------------------------|------------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Open module | | <ul style="list-style-type: none"> • <i>Press on service type to begin</i> • <i>Each module will have a Quote Owner box</i> |
| 2. | Fill in your search criteria | | <ul style="list-style-type: none"> • |
| 3. | Select name in drop down | | <ul style="list-style-type: none"> • <i>Delegating advisor must add in profile before this shows up</i> • <i>Changing this will create the quote under the advisor specified as the owner</i> |

1.2.6 Managing Delegate Notice Board

Managing delegates will have access to the primary advisors notice board and notifications.

Switching the Using ADX as field will change the view on the dashboard notice board and reflect the agent selected.

Delegates will also **receive an email** anytime a new notification is received. Managing delegate will have the ability to manage (confirm/reject) all notifications that need to be actioned.

The screenshot displays the ADX dashboard interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains the text 'Cruise ID, ADX Ref, FNR, or Invoice #' and a user profile for 'Anna Kulej'. A dropdown menu labeled 'USING ADX AS:' is set to 'Norah Rahamim'. Below this, the 'MY QUOTES & BOOKINGS' section is visible, featuring a filter for 'Advisors: Norah Rahamim' and a table of quotes. The table has columns for STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. A 'VIEW ALL' link is present in the top right of this section. Below the quotes table is a 'CLIENTS TRAVELING IN THE NEXT 10 DAYS' section, which currently shows 'No clients traveling in the next 10 days'. At the bottom right, a 'NOTICE BOARD' section is highlighted with a blue box. It includes a 'Create' button and a list of notifications for different advisors: 'ADX Ref. 3C7AYo - Generic Notice Mar 29 2022', 'Brad Smith ADX Ref. 3C4KSG - Special Instructions Jun 12 2020', and 'Sarah Smith ADX Ref. 42MNZo - Special Instructions Mar 22 2019'. A blue arrow points from the 'USING ADX AS:' dropdown to the 'NOTICE BOARD' section.

| STATUS | ADVISOR | CLIENT | QUOTE NAME | DEPART | SERVICES | UPDATED | VIEW |
|-----------|---------|-----------------|-------------------------------------------|----------|----------|----------|------|
| BOOKED NR | NR | Brad Smith | Black Car Network | 05.20.22 | ✈️ | 05.02.22 | View |
| QUOTE | NR | | One Way Flight: New York to London | 04.29.22 | ✈️ | 04.26.22 | View |
| QUOTE | NR | sam smith | Lunch Cruise - La Marina de Paris | 04.28.22 | 🚢 | 04.21.22 | View |
| QUOTE | NR | michael halogen | Delta Airlines | 04.21.22 | ✈️ | 04.14.22 | View |
| QUOTE | NR | | Lunch Cruise - La Marina de Paris | 04.28.22 | 🚢 | 04.13.22 | View |
| QUOTE | NR | | Intercontinental Paris Le Gran - 1 nights | 04.11.22 | 🏠 | 04.11.22 | View |
| QUOTE | NR | john johnson | Blackfoot Inn | 04.28.22 | ✈️ | 04.06.22 | View |
| QUOTE | NR | trust | | 04.29.22 | ✈️ | 04.04.22 | View |

