ADX

Quick Guide –
Set Preferences
June 2022

Contents

1.1. SET PREFERENCES

ADX System preferences can be changed through the advisor profile **Set Preferences** block. Setting these preferences will set defaults for every time you log into ADX and needs to only be set once.

This section will allow to:

- Set general system defaults
- Customize fee defaults
- Customize 247 fee default

1.2.1 General System Defaults

General system defaults will make it easier to use ADX in a consistent manner that works best for your business. General defaults relate to inventory search, commission displays, currencies and itinerary settings.

☑	Steps	✎	Notes

	Air search Inventory (GDS) Preference		• *Air search default*
			• *Select from:*
			   ○ *All – shows both Amadeus and Sabre inventory*
			   ○ *Sabre – shows ONLY Sabre inventory*
			• *Useful if you are planning to use the Sabre emulator to manage your bookings*

	Commission display		• *Commission display on all agent facing pages*
			• *Select from:*
			   ○ *On – commission shows*
			   ○ *Off – commission is hidden*

	Files to show upon login (Using ADX as)		• *Default for the advisor dashboard quotes and bookings section as well as the notification*
			• *Determines who's quotes you see upon logging in by defaulting the "using ADX as" box*
			• *Related to sharing permissions and delegations*
			• *Select from:*
			   ○ *Mine only*
			   ○ *Everyone that is shared with me*

	Default Client Pay selection		• *Related to the client itinerary and whether the client payment link shows when available or is always hidden*
			• *Select from:*
			   ○ *On – always shows on the itinerary when available*
			   ○ *Off – always off*

	Default Currency	• *Related to air search only*
		• *CAD and BMD advisors ONLY*
		    o *CAD advisors can select from CAD and USD*
		    o *BMD advisors can select from BMD and USD*

	Client Itinerary Cancelled Services Visibility	• *Relates to whether cancelled services show on the itinerary or are left off*
		• *Options are:*
		    o *Show by default*
		    o *Hide by default*

	Air Search Filters	• *Relates to air basic fares in the search results*
		• *To remove all basic fares always select HIDE basic economy in the filter*
		• *Options are:*
		    o *Hide basic economy*
		    o *No filter*

	Hide Agent Profile in Client Itinerary	• *Relates to the client itinerary agent profile section*
		• *Hide or show the agent bio section on the document every time*
		• *Options are:*
		    o *Yes – removes the bio section leaving the signature*
		    o *No – leaves the bio section on the document*

1.2.2 Customize Fee Defaults

Service fee defaults can be created through the profile and accessed on the trip service page. Fees can be created as:

- Planning fees
- Change fees
- Custom Fees

ADX•   Partners   Clients   Resources   👁   **Bookings** ˅   Cruise ID, ADX Ref, PNR, or Invoice #   🔍   (Anna Kulej ˅)

Air Search Filters	No Filter Applied ˅
Hide Agent Profile in Client Itinerary	No ˅

[Save Preferences]

Customize your service fee defaults

You can set-up default service fees that will appear in all new itineraries you will create. These settings will only apply to new itineraries and it does not apply to existing itineraries, especially itineraries that have already been sent or paid by your clients.

Service Transaction Fees

✏ **Planning Fee**

1. ————————— You do great work for your clients. Put a value on that work - create an up-front planning fee to recover the cost of your time/effort in quoting and booking this trip.   ›

🔄 **Change Fee**

You do provide post booking service to your client. Add a value for this work - charge a change fee to change travel dates of booked flight or to add room in already booked hotel.   ˅

2. ————————— Your agency suggested fee is USD $25.00 View TE suggested fees

Fee name	Currency	Flat Rate*	Percentage* ❶
3. ————————— | Name | $USD ˅ | $ | or   % |

Describe the Service you will provide

4. ————————— Service description

5. ————————— **How to use this fee**

I'd like this fee to be   [added to all itineraries automatically ˅]

added to all itineraries automatically
displayed on all itineraries as suggested

*Based on client locat

6. ————————— [Cancel] [Save]

	Steps		Notes

1.	Open fee type by clicking > button		• *Select from*
			  ○ *Planning fee*
			  ○ *Change fee*
			  ○ *Custom fee – name it what you like*

2.	Review the TE suggested fee structure		• *A suggested fee may be set by your office manager*
3.	Fill in the fee details		• *Fee name – Will show up on the client document* • *Currency – US, CAD, BMD[1]* • *Flat rate OR Percentage – Charge a flat fee or % of the entire trip and all the services added to one reference* • *Describe the service – Notes that will show up with the fee name*
4.	Add fee description		• *Optional* • *Will appear on the client itinerary*
5.	Select how to use the fee		• *Added to all itineraries automatically – the fee will default to ON and will show on client documents and payment page automatically* • *As Suggested – the fee will default to OFF and will not appear on client documents or payment page until you turn it ON to make it visible*
4.	Press SAVE		•

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[1] Advisors located in the US will ONLY have access to USD currency. Advisors located in Canada will have USD and CAD access to currency. Advisors located in Bermuda will have access to USD and BMD currency.

1.2.3   Customize 247 Fee Defaults

Travel Edge offers a **24/7 VIP Support Plan** that can be sold to your clients to offer a piece of mind. Earn commission when charging your client OR opt to pay for the plan out of your commission… it is up to you!

The VIP support service applies to ONLY the associated ADX reference for which the service was applied and is limited to services booked in ADX. Coverage is valid from the date of the client's departure to the date of return. Service is applicable only to one continuous excursion with a maximum of nine passengers.

The plan settings can be configured to add your selection automatically to every itinerary. You will have options for coverage and payment preferences as follows:

Opt into 24/7 support and client pays for the fee.
- o   A fee charge of $60 will be added to the trip under the payment tab.
- o   The itinerary will show the cost breakdown including the fee amount.
- o   The advisor will receive $12 commission from the sale[2]

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[2] Amount shown is subject to advisor split

Opt in to 24/7 support and Advisor covers the cost
- No extra payment is collected from the client.
- The fee of $48 will get deducted from the advisor commission by finance.
- Itinerary will not show the cost amount.

Opt out of 24/7 support and provide on demand cost

○ Client is not charged for a cost upfront

○ Advisor will be **charged per call** to the 24/7 support team

○ On demand fee schedule will appear on the client itinerary

No Coverage

o Client is not charged for service
o Advisor can add their own phone number to add as a contact
o 24/7 number will NOT show on the client itinerary
o IF client does call 24/7 support the On Demand fee structure will apply