



Quick Guide –
Set Preferences
June 2022

Contents

1.1.	SET PREFERENCES	3
1.2.1	General System Defaults.....	4
1.2.2	Customize Fee Defaults.....	7
1.2.3	Customize 247 Fee Defaults.....	10

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

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

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 at anytime to ensure your account is secure.

Set Preferences

Customize your default values for certain fields within ADX

Air Search Inventory (GDS) Preference	All
Commission Display	On
Files to show upon login ("Using ADX As" field)	Mine Only
Default Client Pay selection (when available)	On
Default Currency	USD
Client Itinerary View Quote Preference	Show by Default
Client Itinerary Canceled Services Visibility	No Filter Applied
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
You have added **Consultation Fee** to all itineraries as suggested in the amount of **\$150 USD**

Create a New Planning Fee

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.

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.

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Change your password at anytime to ensure your account is secure.

Set Preferences

Customize your default values for certain fields within ADX

Air Search Inventory (GDS) Preference	All
Commission Display	On
Files to show upon login ("Using ADX As" field)	None Only
Default Client Pay selection (when available)	On
Default Currency	USD
Client Itinerary View Quote Preference	
Client Itinerary Canceled Services Visibility	Show by Default
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.

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	Steps		Notes
	Air search Inventory (GDS) Preference		<ul style="list-style-type: none"> • <i>Air search default</i> • <i>Select from:</i> <ul style="list-style-type: none"> ○ <i>All – shows both Amadeus and Sabre inventory</i> ○ <i>Sabre – shows ONLY Sabre inventory</i> • <i>Useful if you are planning to use the Sabre emulator to manage your bookings</i>
	Commission display		<ul style="list-style-type: none"> • <i>Commission display on all agent facing pages</i> • <i>Select from:</i> <ul style="list-style-type: none"> ○ <i>On – commission shows</i> ○ <i>Off – commission is hidden</i>
	Files to show upon login (Using ADX as)		<ul style="list-style-type: none"> • <i>Default for the advisor dashboard quotes and bookings section as well as the notification</i> • <i>Determines who's quotes you see upon logging in by defaulting the "using ADX as" box</i> • <i>Related to sharing permissions and delegations</i> • <i>Select from:</i> <ul style="list-style-type: none"> ○ <i>Mine only</i> ○ <i>Everyone that is shared with me</i>
	Default Client Pay selection		<ul style="list-style-type: none"> • <i>Related to the client itinerary and whether the client payment link shows when available or is always hidden</i> • <i>Select from:</i> <ul style="list-style-type: none"> ○ <i>On – always shows on the itinerary when available</i> ○ <i>Off – always off</i>

	Default Currency	<ul style="list-style-type: none"> • <i>Related to air search only</i> • <i>CAD and BMD advisors ONLY</i> <ul style="list-style-type: none"> ○ <i>CAD advisors can select from CAD and USD</i> ○ <i>BMD advisors can select from BMD and USD</i>
	Client Itinerary Cancelled Services Visibility	<ul style="list-style-type: none"> • <i>Relates to whether cancelled services show on the itinerary or are left off</i> • <i>Options are:</i> <ul style="list-style-type: none"> ○ <i>Show by default</i> ○ <i>Hide by default</i>
	Air Search Filters	<ul style="list-style-type: none"> • <i>Relates to air basic fares in the search results</i> • <i>To remove all basic fares always select HIDE basic economy in the filter</i> • <i>Options are:</i> <ul style="list-style-type: none"> ○ <i>Hide basic economy</i> ○ <i>No filter</i>
	Hide Agent Profile in Client Itinerary	<ul style="list-style-type: none"> • <i>Relates to the client itinerary agent profile section</i> • <i>Hide or show the agent bio section on the document every time</i> • <i>Options are:</i> <ul style="list-style-type: none"> ○ <i>Yes – removes the bio section leaving the signature</i> ○ <i>No – leaves the bio section on the document</i>

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

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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

You have added **Consultation Fee** to all itineraries as suggested in the amount of **\$150 USD**

Planning Fee

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.

Your agency suggested fee is USD \$100.00 [View TE suggested fees](#)

Fee name	Currency	Flat Rate*	Percentage*
<input type="text" value="Name"/>	<input type="text" value="\$USD"/>	<input type="text" value="\$"/>	<input type="text" value="or %"/>

Describe the Service you will provide

How to use this fee

I'd like this fee to be

*Based on client location, applicable taxes will be calculated.

[Cancel](#) [Save](#)

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.

24/7 Support Fee

The 24/7 VIP Support Service is designed to give yourself and your clients the peace of mind that all their issues that may arise before and during their trip will be resolved by a highly skilled team of support agents. The service can be used by your clients directly or by yourself on behalf of your clients once the service has been purchased. This service is valid from day of travel to day of return. The 24/7 VIP Support Service applies to only the associated ADX Reference and is limited to services booked directly in ADX, this service will not support travel services booked through the external service portal and cruise, including Merchant of Record services. This service is only valid for one continuous trip on a single itinerary, any disputes as to what constitutes a continuous trip will be resolved in consultation with your Relationship Manager and the 24/7 Support Services Manager.

Custom Fee

You can create your own fee templates for any other value-added services you provide to your client. You can set up reservation

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

2. [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.](#) ▾
3. Your agency suggested fee is USD \$25.00 [View TE suggested fees](#)

Fee name

Currency

Flat Rate*

Percentage* ⓘ

Name

\$USD ▾

\$

or

%

Describe the Service you will provide

Service description



4. [How to use this fee](#)
5. I'd like this fee to be

added to all itineraries automatically ▾

added to all itineraries automatically

*Based on client location displayed on all itineraries as suggested

6. [Cancel](#) [Save](#)

	Steps		Notes
1.	Open fee type by clicking > button		<ul style="list-style-type: none"> • <i>Select from</i> <ul style="list-style-type: none"> ○ <i>Planning fee</i> ○ <i>Change fee</i> ○ <i>Custom fee – name it what you like</i>
2.	Review the TE suggested fee structure		<ul style="list-style-type: none"> • <i>A suggested fee may be set by your office manager</i>
3.	Fill in the fee details		<ul style="list-style-type: none"> • <i>Fee name – Will show up on the client document</i> • <i>Currency – US, CAD, BMD¹</i> • <i>Flat rate OR Percentage – Charge a flat fee or % of the entire trip and all the services added to one reference</i> • <i>Describe the service – Notes that will show up with the fee name</i>
4.	Add fee description		<ul style="list-style-type: none"> • <i>Optional</i> • <i>Will appear on the client itinerary</i>
5.	Select how to use the fee		<ul style="list-style-type: none"> • <i>Added to all itineraries automatically – the fee will default to ON and will show on client documents and payment page automatically</i> • <i>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</i>
4.	Press SAVE		<ul style="list-style-type: none"> •

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 screenshot shows the '24/7 Support Fee' configuration page in the ADX system. The page has a top navigation bar with links for 'Partners', 'Clients', 'Resources', and 'Bookings'. A search bar and a user profile 'Anna Kulej' are also present. The main content area is titled '24/7 Support Fee' and includes a detailed description of the service. Below the description, there are two main options: '24/7 support plan' (marked as 'Recommended') and 'On demand'. Each option has a table for 'Cost' and 'Requests', and a 'Payment preference' section. The '24/7 support plan' option shows a cost of 48 and unlimited requests, with a payment preference of 'Client Pays \$60' (selected) and 'I earn \$12'. The 'On demand' option shows a cost of 'Per request' and unlimited requests, with a payment preference of 'Final invoice will be sent to you after the end trip date.' At the bottom, there is a 'No coverage' option with a radio button. A 'Save' button is located at the bottom right of the form.

24/7 Support Fee

The 24/7 VIP Support Service is designed to give yourself and your clients the peace of mind that all their issues that may arise before and during their trip will be resolved by a highly skilled team of support agents. The service can be used by your clients directly or by yourself on behalf of your clients once the service has been purchased. This service is valid from day of travel to day of return. The 24/7 VIP Support Service applies to only the associated ADX Reference and is limited to services booked directly in ADX, this service will not support travel services booked through the external service portal and cruise, including Merchant of Record services. This service is only valid for one continuous trip on a single itinerary, any disputes as to what constitutes a continuous trip will be resolved in consultation with your Relationship Manager and the 24/7 Support Services Manager.

Option	Cost	Requests	Payment preference
24/7 support plan (Recommended)	48	Unlimited	<input checked="" type="radio"/> Client Pays \$60 I earn \$12 <input type="radio"/> I'm covering the cost for my client
On demand	Per request	Unlimited	<input type="radio"/> Final invoice will be sent to you after the end trip date.

No coverage

☐ No thanks, I won't be offering 24/7 support service to my client

Save

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.

- A fee charge of \$60 will be added to the trip under the payment tab.
- The itinerary will show the cost breakdown including the fee amount.
- The advisor will receive \$12 commission from the sale²

The screenshot shows the '24/7 Support Fee' configuration page in the ADX Partners interface. The page has a top navigation bar with 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. Below the navigation bar, there's a 'Create a New Planning Fee' button. The main content area is titled '24/7 Support Fee' and includes a description of the service. Below the description, there are two main options: '24/7 support plan' (marked as 'Recommended') and 'On demand'. The '24/7 support plan' shows a cost of 48 and unlimited requests. The 'On demand' option shows a cost of 'Per request' and unlimited requests. Both options have a 'Payment preference' section. In the '24/7 support plan' section, the 'Client Pays \$60' option is selected, and 'I earn \$12' is displayed next to it. The 'On demand' section has a 'Final invoice will be sent to you after the end trip date' option. At the bottom, there is a 'No coverage' section with a radio button option 'No thanks, I won't be offering 24/7 support service to my client'. A 'Save' button is located at the bottom right of the form.

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.

ADX Partners Clients Resources Bookings Cruise ID, ADX Ref, PINR, or Invoice # Anna Kulej

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.

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24/7 support plan *Recommended*

Cost 48

Requests Unlimited

Payment preference

☐ Client Pays \$60 I earn \$12

☒ I'm covering the cost for my client

On demand

Cost Per request

Requests Unlimited

Payment preference

☐ Final invoice will be sent to you after the end trip date.

No coverage

☐ No thanks, I won't be offering 24/7 support service to my client

Save

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

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Create a New Planning Fee

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24/7 support plan *Recommended*

Cost 48

Requests Unlimited

Payment preference

☐ Client Pays \$60 *I earn \$12*

☐ I'm covering the cost for my client

On demand

Cost Per request

Requests Unlimited

Payment preference

☒ Final invoice will be sent to you after the end trip date.

No coverage

☐ No thanks, I won't be offering 24/7 support service to my client

Save

No Coverage

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

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booked flight or to add room in already booked hotel.

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24/7 support plan

Cost 48

Requests Unlimited

Payment preference

☐ Client Pays \$60 **I earn \$12**

☐ I'm covering the cost for my client

On demand

Cost Per request

Requests Unlimited

Payment preference

☐ Final invoice will be sent to you after the end trip date.

No coverage

☒ No thanks, I won't be offering 24/7 support service to my client

Clients can reach me at this phone number

Save