

Quick Guide – Set Preferences June 2022

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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

	Access Sharing Set Preferences customize default	Change Password Change your password
and contents of emails and documents.	gs with other ADX values for certain field users. within ADX.	ls at anytime to ensure your account is secure.
Customize your default values for certain fiel	ds 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		~
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 does not apply to existing itineraries, especially itine Service Transaction Fees Planning Fee		
•	ineraries as suggested in the amount of \$1!	50 USD
Create a New Planning Fee		
Change Fee You do provide post booking service to your booked flight or to add room in already book		ange fee to change travel dates of

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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and contents of emails bookin and documents.		certain fields at anytime to in ACIK. your account is	
Set Preferences			
Customize your default values for certain fie	ids within ADX		
Air Search Inventory (GDS) Preference	All	~	
Commission Display	On	v	
Files to show upon login ("Using ADX As" field)	Mine Only	~	
Default Client Pay selection (when available)	On	Υ.	
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			
Customiae your service fee defaults			
You can set up default service fees that will appear i	n all new itineraries you will create	. These settings will only apply to	new itineraries and it
does not apply to existing itineraries, especially itine			
Service Transaction Fees			
Planning Fee			
You have added Consultation Fee to all it	ineraries as suggested in the am	ount of \$150 USD	/ 8
Create a New Planning Fee			
G Change Fee			
You do provide post booking service to your	client. Add a value for this work - led hotel.	charge a change fee to change trav	vel dates of

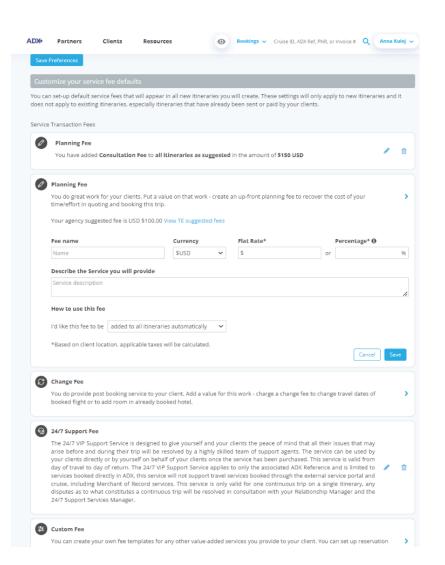
₹	Steps		Notes
	Air search Inventory (GDS) Preference	• Se	r search default elect from:
	Commission display		ommission display on all agent facing pages elect from:
	Files to show upon login (Using ADX as)	as • Do "L • Re	efault for the advisor dashboard quotes and bookings section as well to the notification etermines who's quotes you see upon logging in by defaulting the using ADX as" box elated to sharing permissions and delegations elect from: O Mine only O Everyone that is shared with me
	Default Client Pay selection	sh	elated to the client itinerary and whether the client payment link nows when available or is always hidden elect from: On – always shows on the itinerary when available Off – always off

Default Currency	 Related to air search only CAD and BMD advisors ONLY CAD advisors can select from CAD and USD 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: Show by default 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: Hide basic economy 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: Yes – removes the bio section leaving the signature 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



Air Sea	rch Filters			No Filter Applied		~			
Hide Ag	gent Profile in (lient Itinerary		No		~			
Save P	references								
Custo	mize your ser	vice fee defaul	lts						
					you will create. These ady been sent or paid			w itinerar	ries and it
			,,			-,,,-			
Service	Transaction Fee	S							
Ø	Planning Fee								
 	You do great wr	ork for your clien	nts. Put a value	e on that work - co	ate an up-front plann	ing fee to recove	r the cost of	your	
	-	uoting and book				-			
	time/effort in qu					-			
 3	time/effort in qu Change Fee You do provide booked flight or	post booking se to add room in	rvice to your of already book	client. Add a value	or this work - charge a	a change fee to c	hange travel	-	
 8	time/effort in qu Change Fee You do provide booked flight or	post booking se to add room in	rvice to your of already book	client. Add a value ed hotel.	or this work - charge a	a change fee to c	_	-	
 8	time/effort in qu Change Fee You do provide booked flight or Your agency suj	post booking se to add room in	rvice to your of already book	client. Add a value ed hotel. w TE suggested fee	for this work - charge a	a change fee to c	_	dates of	
 3	time/effort in qu Change Fee You do provide booked flight or Your agency sug Fee name Name	post booking se to add room in ggested fee is US	rvice to your o already book SD \$25.00 View	client. Add a value ed hotel. w TE suggested fee Currency	for this work - charge a	a change fee to c	Percer	dates of	
 3	time/effort in qu Change Fee You do provide booked flight or Your agency sug Fee name Name	post booking se to add room in ggested fee is US	rvice to your o already book SD \$25.00 View	client. Add a value ed hotel. w TE suggested fee Currency	for this work - charge a	a change fee to c	Percer	dates of	
 3	time/effort in qu Change Fee You do provide booked flight or Your agency sug Fee name Name Describe the Se	post booking se to add room in ggested fee is US	rvice to your o already book SD \$25.00 View	client. Add a value ed hotel. w TE suggested fee Currency	for this work - charge a	a change fee to c	Percer	dates of	
	time/effort in qu Change Fee You do provide booked flight or Your agency sug Fee name Name Describe the Se	post booking se to add room In ggested fee is US ervice you will ; tion	rvice to your o already book SD \$25.00 View	client. Add a value ed hotel. w TE suggested fee Currency	for this work - charge a	a change fee to c	Percer	dates of	
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	time/effort in qu Change Fee You do provide booked flight or Your agency sug Fee name Name Describe the Si Service descrip	post booking se to add room in ggested fee is US ervice you will p tion s fee o be added to	ervice to your of already book 5D \$25.00 View provide	client. Add a value ed hotel. w TE suggested fee Currency	for this work - charge a	a change fee to c	Percer	dates of	

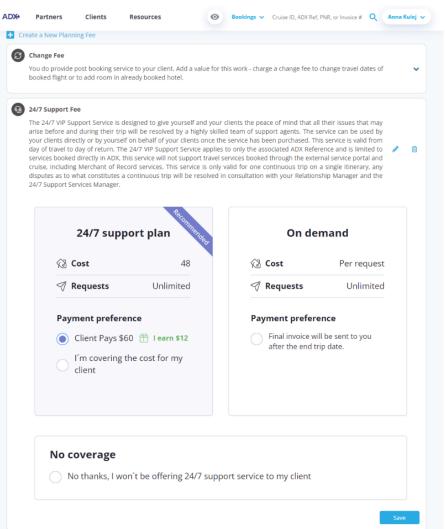
žΞ	Steps		Notes
1.	Open fee type by clicking > button	• \$	Select from Planning fee Change fee Custom fee – name it what you like
2.	Review the TE suggested fee structure		A suggested fee may be set by your office nanager
3.	Fill in the fee details	C C F C C C	Fee name – Will show up on the client document 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		Dptional Will appear on the client itinerary
5.	Select how to use the fee	• A	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	•	

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.

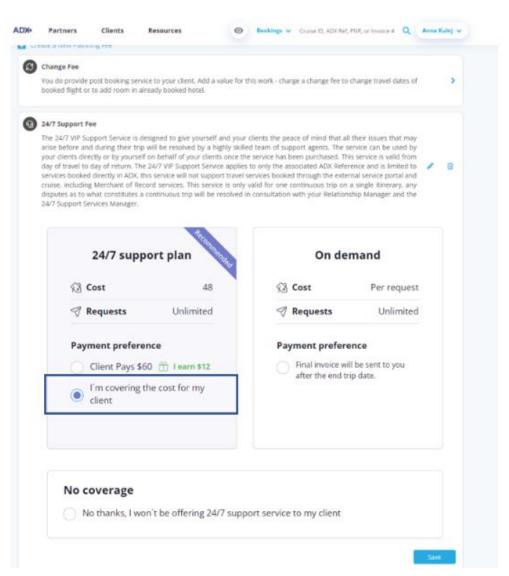
- A fee charge of \$60 will be added to the trip under the payment tab.
- The itinerary will show the cost breakdown including the fee amount.
- \circ ~ The advisor will receive \$12 commission from the sale^2 ~

Cha	nge Fee					
	do provide post booking service ked flight or to add room in alrea		e this work - cha	rge a change fee to	change travel dates of	
24/7	Support Fee					
arise your day serv crus disp	24/7 VIP Support Service is dealy clients directly or by yourself or of travel to day of return. The 24 ices booked directly in ADX: this se, including Merchant of Record utes as to what constitutes a co- fsupport Services Manager.	II be resolved by a highly sk to behalf of your clients once U7 VIP Support Service appli service will not support baw I services. This service is on	illed team of sup the service has t les to only the ai of services booke by valid for one	oport agents. The s been purchased. This sociated ADX Refer d through the exter continuous trip on	ervice can be used by is service is valid from ence and is limited to mal service portal and a single itinerary, any	1 0
	24/7 suppo	rt plan		On de	mand	
	🖓 Cost	48	63	Cost	Per request	
	🖪 Requests	Unlimited	Ż	Requests	Unlimited	ŧ.
	Payment preference	e	Pay	ment prefere	nce	
	Client Pays \$60	🗄 1 earn \$12	0	Final invoice wi after the end tr	ll be sent to you io date.	
	C lient	e cost for my			₩	
	No coverage	t be offering 24/7 sup	oport service	to my client.		

² Amount shown is subject to advisor split

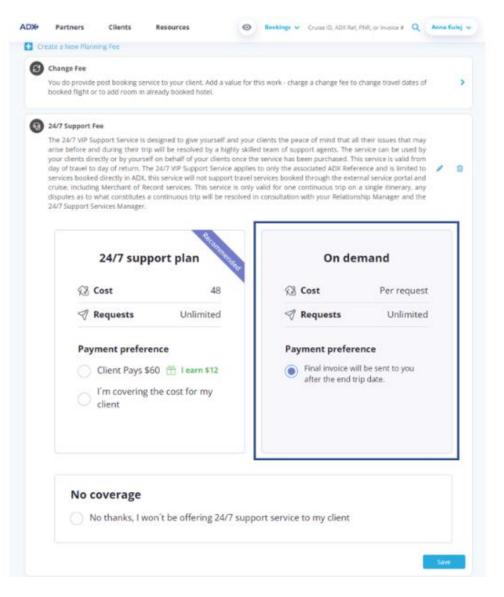
Opt in to 24/7 support and Advisor covers the cost

- 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

- O Client is not charged for a cost upfront
- O Advisor will be charged per call to the 24/7 support team
- O On demand fee schedule will appear on the client itinerary



No Coverage

- o Client is not charged for service
- \circ $\;$ 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

