



Quick Guide –  
Customize Fee Defaults  
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

## 1.2.1 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.

**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 v  
Hide Agent Profile in Client Itinerary No v

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. v

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

Fee name

Currency

Flat Rate\*

Percentage\* ⓘ

3. Name \$USD v \$ or %

Describe the Service you will provide

4. Service description

How to use this fee

I'd like this fee to be added to all itineraries automatically v

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

<sup>1</sup> 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.

## 1.2.2 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 Travel Edge system. The page is titled '24/7 Support Fee' and includes a description of the service. Below the description, there are three main options for configuring the fee:

- 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

A 'Save' button is located at the bottom right of the form.

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 – This is the default on your account!**

- 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 sale<sup>2</sup>

The screenshot shows the '24/7 Support Fee' configuration page in the ADX system. The page is titled '24/7 Support Fee' and includes a 'Recommended' badge. The main content area is divided into two columns: '24/7 support plan' and 'On demand'. The '24/7 support plan' section shows a cost of 48 and unlimited requests. Under the 'Payment preference' section, the 'Client Pays \$60' option is selected, and 'I earn \$12' is displayed next to it. The 'On demand' section shows a cost of 'Per request' and unlimited requests. Under its 'Payment preference' section, the 'Final invoice will be sent to you after the end trip date' option is selected. At the bottom, there is a 'No coverage' section with the 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.

<sup>2</sup> 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.

The screenshot shows the ADX interface with a navigation bar at the top containing 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. Below the navigation bar, there are two main sections: 'Change Fee' and '24/7 Support Fee'. The '24/7 Support Fee' section contains a detailed description of the service and two main options: '24/7 support plan' (marked as 'Recommended') and 'On demand'. The '24/7 support plan' option shows a cost of 48 and unlimited requests. Under 'Payment preference', the option 'I'm covering the cost for my client' is selected. 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.' A 'No coverage' option is also present at the bottom, with the text '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.

**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.

**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

**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.

**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.

### 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.

<b>24/7 support plan</b>	<i>Recommended</i>
<b>Cost</b>	48
<b>Requests</b>	Unlimited
<b>Payment preference</b>	
<input type="radio"/> Client Pays \$60 <b>I earn \$12</b>	
<input type="radio"/> I'm covering the cost for my client	

<b>On demand</b>	
<b>Cost</b>	Per request
<b>Requests</b>	Unlimited
<b>Payment preference</b>	
<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

**Clients can reach me at this phone number**

Save