



Client Profiles

June 2022

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1. Client Profiles Overview

Client profiles created in ADX will be pushed into and stored in the Travel Edge Client Base system. Advisors who have existing profiles in Client Base will be able to access them using ADX¹. The profile will house basic client information as well as companion profiles, loyalty numbers, marketing options, travel history and all communication out of ADX.

Mr. Sam Smith 23 March 1990, Male | 5554445555

Client Information [Edit](#)

NAME	Mr. Sam Smith	INVOICE ADDRESS	123 Sunny Drive San Diego, California United States
BIRTHDAY	23 March 1990	BILLING ADDRESS	Same as Invoice Address
GENDER	Male	UPCOMING TRIP	19 May 2022, 3E2TPT
PHONE	5554445555	LAST TRAVELED	10 April 2022, 51M4NW
ADVISOR (PRIMARY)	Anna Kulej		

QUOTES & BOOKINGS FOR MR. SAM SMITH

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated	
<input type="checkbox"/>	QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	31.05.22		04.05.22	View
<input type="checkbox"/>	ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	11.05.22		02.05.22	View
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Seattle Airport Marriott	19.05.22		02.05.22	View
<input type="checkbox"/>	PART BOOKED	AK	Sam Smith	Round Trip Flights: Los Angeles ...	12.06.22		26.04.22	View
<input type="checkbox"/>	BOOKED N/A	AK	Sam Smith	The Regent Resort Chiang Mai	18.04.22		17.01.22	View

Results: 1 - 5 of 78

Sent Emails (5) **Notifications (13)**

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS	
11 Jan 2022	Quote	7IX6E3	Ritz Carlton Marina Del Rey	michael.guber@traveledge.com	View
5 Jan 2022	Quote	1QJGDA	Residence Inn Downtwn Marriott - 1 nights	anisha.ramathal@triparc.com	View
7 Oct 2021	Quote	6P5Go5	One Way Flight: Los Angeles to London	smith@smith.com	View

¹ Clients ONLY pulled and stored in Travel Edge CB

1.1.CLIENT PROFILE DETAILS

The client profile can be updated to maintain up to date information. Advisor can also see the full quote and travel history of all records done for anybody associated with a primary client. Lastly, all of the communication coming in and going out of ADX will also be stored on the profile. The client profile is split into sections, click on the section to review the details:

- Client information
- Additional Details and Preferences
- Loyalty Programs
- Marketing Fields
- Notes
- Quote and Booking History
- Communication History

Client Information Edit

NAME	Miss Sarah Smith	EMAIL	sarah@smith.com
BIRTHDAY	4 May 1981	INVOICE ADDRESS	123 Sunny Drive San Diego, California United States, 54323
GENDER	Female	BILLING ADDRESS	Same as Invoice Address
PHONE	416-444-4343	UPCOMING TRIP	None
ADVISOR (PRIMARY)	Anna Kulej	LAST TRAVELED	13 April 2022, 7H13PS

QUOTES & BOOKINGS FOR MISS SARAH SMITH

Archive | Status | Advisor | Client | Quote Name | Depart | Services | Updated

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	One Way Flight: Los Angeles to N...	24.05.22	✈️🌐	05.05.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Deluxe Travel Protection Plan Quote	30.05.22	🛡️🌐	05.05.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Deluxe Travel Protection Plan Quote	15.05.22	🛡️🌐	29.04.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Multiple Air Services	16.10.22	✈️🌐🚗	27.04.22	View
<input type="checkbox"/>	TRAVELED	NR	Sarah Smith	Round Trip Flights: Toronto - Pa...	13.04.22	✈️🌐	28.01.22	View

Results: 1 - 5 of 988

Sent Emails (39) Notifications (380)

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS	View
2 Feb 2022	Quote	7H13PS	Round Trip Flights: Toronto - Paris	john.wippersteg@trip-arc.com	View
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippersteg@trip-arc.com	View
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippersteg@trip-arc.com	View
1 Jun 2021	Quote	4ZoNNQ	Round Trip Flights: Los Angeles - Paris	sarah@smith.com	View

1.1.1 Client Information

Basic information pertaining to the primary client. Pressing EDIT opens the original New Client form for quick and easy edits to all sections, minus marketing fields.

- Name
- Birthdate
- Gender
- Phone number
- Email Address
- Invoice/billing Address
- Loyalty Numbers
- Passport Information

The screenshot shows the ADX interface for a client named Miss Sarah Smith. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources'. A search bar contains the name 'Anna Kulej'. Below the navigation, the client's name 'Miss Sarah Smith' is displayed along with her birthdate '4 May 1981', gender 'Female', phone number '416-444-4343', and email 'sarah@smith.com'. A row of seven blue buttons with icons and dropdown arrows provides quick access to various tools: 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. Below this is a 'Client Information' section with an 'Edit' link. On the left, a sidebar menu lists 'Companions', 'Additional Details and Preferences', 'Loyalty Programs', 'Marketing Fields', and 'Notes'. The main content area displays the client's details in a table format.

NAME	Miss Sarah Smith	EMAIL	sarah@smith.com
BIRTHDAY	4 May 1981	INVOICE ADDRESS	123 Sunny Drive San Diego, California United States, 54323
GENDER	Female	BILLING ADDRESS	Same as Invoice Address
PHONE	416-444-4343	UPCOMING TRIP	None
ADVISOR (PRIMARY)	Anna Kulej	LAST TRAVELED	13 April 2022, 7H13PS

1.1.2 Companions

Create companion profiles linked to the primary client. Each companion will have a relationship association with the client and will be able to be added to an itinerary as a traveler. Companions can also be created on the trip reference and saved to the primary client profile.

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

Miss Sarah Smith 4 May 1981, Female | 416-444-4343 | sarah@smith.com

ITINERARY BUILDER AIR HOTEL ACTIVITY INSURANCE CRUISE INVOICE TOOL

Client Information Companions [+ New Companion](#)

NAME	RELATIONSHIP	BIRTHDAY	
Ms. Amanda Jones	Friend	5 July 1987	Edit
Mr. Gordon Jones	Other	19 November 2000	Edit
Ms. Greta Jones	Friend	4 May 1988	Edit
Ms. Greta Johnson	Friend	16 March 1969	Edit
Ms. Greta Jones	Friend	4 May 1988	Edit
Mr. Jack Jones	Boyfriend	2 May 1988	Edit
Mstr Sammy Smith	Son	11 October 2017	Edit
Ms. Sandy Smith	Wife	4 October 1978	Edit

NEW COMPANION FOR SARAH SMITH

RELATIONSHIP TO CLIENT*
Select Relationship

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER*
 M | F

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER
 Not Specified

SEATING PREFERENCE MEAL PREFERENCE
 Select Seating Preference None

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE
<input type="text"/>	Not Specified	<input type="text"/>

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

1.1.3 Additional Details and Preferences

Information pertaining to travel documents and preferences will show in this section and include:

- Seating preference (advisor facing only)
- Meal preference
- Nationality
- Known Traveler Number
- Redress Number
- Passport information

The screenshot displays a user interface for a travel management system. At the top, there is a navigation bar with links for 'ADX', 'Partners', 'Clients', and 'Resources'. A search bar contains the text 'Bookings' and 'Cruise ID, ADX Ref, PNR, or Invoice #'. A user profile dropdown shows 'Anna Kulej'. Below the navigation, the client's name 'Miss Sarah Smith' is displayed along with her birth date '4 May 1981', gender 'Female', phone number '416-444-4343', and email 'sarah@smith.com'. A row of seven blue buttons with icons and dropdown arrows is visible: 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. On the left, a vertical sidebar lists menu items: 'Client Information', 'Companions', 'Additional Details and Preferences' (which is highlighted), 'Loyalty Programs', 'Marketing Fields', and 'Notes'. The main content area is titled 'Additional Details & Preferences' and includes an 'Edit' link. It contains a table of client preferences and details.

SEATING PREFERENCE	MEAL PREFERENCE		
Aisle	None		
NATIONALITY	KNOWN TRAVELER NUMBER	REDRRESS NUMBER	
United States	000012345		
PASSPORT NO.	ISSUING COUNTRY	EXPIRY DATE	
12344B	United States	7 July 2028	

1.1.4 Loyalty Programs

Client loyalty numbers are stored and pushed automatically at the time of booking. You can store loyalty numbers for the following service types:

- Cruise
- Air
- Hotel

The screenshot shows the ADX client profile interface. At the top, there are navigation tabs: ADX, Partners, Clients, and Resources. A search bar contains the text "Bookings" and "Cruise ID, ADX Ref, PNR, or Invoice #". The user's name "Anna Kulej" is visible in the top right. The main header for the client profile reads "Miss Sarah Smith" followed by "4 May 1981, Female | 416-444-4343 | sarah@smith.com". Below this is a row of seven tool buttons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. The "Loyalty Programs" section is active, showing a table with columns for TYPE, VENDOR, and NUMBER. The table lists five programs: Air (AMERICAN AIRLINES, 12345), Air (BRITISH AIRWAYS, 123456), Hotel (HILTON HOTEL BRANDS, 333222), Hotel (HILTON GARDEN INN, 12345), and Cruise (Celebrity Cruises, 1234567890). An "Edit" link is present in the top right of the table.

TYPE	VENDOR	NUMBER
Air	AMERICAN AIRLINES	12345
Air	BRITISH AIRWAYS	123456
Hotel	HILTON HOTEL BRANDS	333222
Hotel	HILTON GARDEN INN	12345
Cruise	Celebrity Cruises	1234567890

Please NOTE: Updating loyalty numbers on the client profile will NOT retroactively make updates to any itineraries where the client is attached. To make changes to ACTIVE quotes and bookings, please do so on the trip reference directly.

1.1.5 Client Marketing Fields

Set and manage client marketing options through ADX directly. Marketing codes can be used for informational purposes only **OR** you can opt your client into receiving monthly marketing **Arrive** emails with your advisor personalization automatically attached.

To opt into client marketing select the TE Marketing field under section 7. Marketing.

The screenshot shows the ADX interface for a client named Miss Sarah Smith. The main profile page includes a navigation bar with 'Partners', 'Clients', and 'Resources'. Below the client name, there are icons for 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. The 'Marketing Fields' section is highlighted, showing options for 'Opt-out' and 'Edit'. The 'Marketing' field is set to 'TE Marketing'. A modal window titled 'EDIT MARKETING FIELDS' is open, showing various marketing options. The '7. Marketing' section is highlighted with a blue box, and the 'TE MARKETING' checkbox is selected. Other sections include '4. Trip Frequency', '5. Client Status', '6. Life Cycle', and '8. Interests'. The modal window has 'Cancel' and 'Save' buttons at the bottom.

Section	Option	Status
4. Trip Frequency	1/YEAR	<input type="checkbox"/>
	2-3/YEAR	<input type="checkbox"/>
	4-5/YEAR	<input type="checkbox"/>
	OVER 5/YEAR	<input type="checkbox"/>
5. Client Status	VIP	<input type="checkbox"/>
	CLIENT	<input type="checkbox"/>
	REFERRAL	<input type="checkbox"/>
6. Life Cycle	SINGLE	<input type="checkbox"/>
	MARRIED	<input type="checkbox"/>
7. Marketing	DIRECT MAIL	<input type="checkbox"/>
	EMAIL CAMPAIGN	<input type="checkbox"/>
	NO NOTIFICATIONS (OVERALL)-NOVCC	<input type="checkbox"/>
	NO ANNIVERSARY-NOANN	<input type="checkbox"/>
	NO BIRTHDAY-NOBODY	<input type="checkbox"/>
	NO BON VOYAGE-NOBVE	<input type="checkbox"/>
	TE MARKETING	<input checked="" type="checkbox"/>
8. Interests	4-WHEEL DRIVE EXPEDITION	<input type="checkbox"/>
	ADULT EDUCATION	<input type="checkbox"/>
	ADVENTURE	<input type="checkbox"/>
	ART/THEATRE	<input type="checkbox"/>
	BALLOONING	<input type="checkbox"/>
	BIRDING	<input type="checkbox"/>
	CELEBRATION TRAVEL	<input type="checkbox"/>
	CLIMBING	<input type="checkbox"/>
	CRUISE-BARGE	<input type="checkbox"/>
	CRUISE-EXPEDITION	<input type="checkbox"/>
	CRUISE-LARGE SHIP	<input type="checkbox"/>
	CRUISE-RIVER	<input type="checkbox"/>

1.1.6 Notes

Client notes ONLY appear on the client itinerary and do not transfer to any client facing documents or records.

The screenshot shows a user interface for a client profile. At the top, there are navigation tabs: ADX, Partners, Clients, and Resources. A 'Bookings' dropdown menu is visible, along with a search bar containing 'Cruise ID, ADX Ref, PNR, or Invoice #' and a user profile for 'Anna Kulej'. The main header identifies the client as 'Miss Sarah Smith', born 4 May 1981, Female, with contact information 416-444-4343 and sarah@smith.com. Below the header is a row of seven service buttons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A left-hand sidebar contains a menu with options: Client Information, Companions, Additional Details and Preferences, Loyalty Programs, Marketing Fields, and Notes (which is currently selected). The main content area is titled 'Notes' and contains a text box with the following text: 'VIP client. Travels yearly to Madrid for business. Prefers first class AA. Set up to send birthday greetings automatically.' A 'Save Changes' button is located at the bottom right of the notes section.

1.1.7 Birthday and Passport Reminders

ADX can be configured to send your primary clients automatic birthday greetings and passport renewals. Customize the messaging in your advisor profile and check the opt in boxes on the client profile. Passport renewal reminder will get sent to the primary client **90 days** before the expiry date stored in the client profile.



Happy Birthday & Best Wishes!

Hello,

Happy Birthday - May this special day be filled with lots of happy moments, and may the year to come be filled with health, happiness and travel!

All the best,



Passport Expiry Notification

My records indicate that your passport is expiring soon. Please be sure to renew it so that you are ready for your next adventure!

You can find the passport renewal form at <https://travel.state.gov/content/passports/en/passports/forms.html>.

All the best,

First, set up your default messaging for both message types in your advisor profile.

1. ADX Partners Clients Resources Bookings

2. Communication Profile
Control the appearance and contents of emails and documents.

3. Communication Profile
Welcome to your communications profile. On this tab you can control the appearance and contents of emails and documents that your clients will receive from you via ADX.

4. Customize Body Text of Itinerary Emails

5. Passport Expiry Notification

6. All the best.

7. Save Email Templates

	Steps		Notes
1.	Open MY PROFILE		<ul style="list-style-type: none"> • Name located at the top right corner • Press the v button • Select MY PROFILE
2.	Click COMMUNICATION PROFILE tab		<ul style="list-style-type: none"> •
3.	Click the “Customize Body Text of Itinerary Emails” header		<ul style="list-style-type: none"> • Sixth tab down in the list • Details will expand down
4.	Click the Birthday Greeting/Passport Renewal tab		<ul style="list-style-type: none"> •
5.	Customize body of the email text		<ul style="list-style-type: none"> •
6.	Review the formatting of the text entered		<ul style="list-style-type: none"> •
7.	Click SAVE EMAIL TEMPLATE		<ul style="list-style-type: none"> •

On the client form check the boxes to set up the automatic email distribution. This can be done at the time of the client profile creation or edited after creating the profile.

CREATE NEW CLIENT

TITLE: [v] FIRST NAME*: [] MIDDLE NAME: [] LAST NAME*: [] GENDER*: [M] | [F]

DATE OF BIRTH: [] NATIONALITY: [Not Specified] KNOWN TRAVELER NUMBER: [] REDRESS NUMBER: []

SEND BIRTHDAY GREETING

PRIMARY ADVISOR: [Anna Kulej]

PRIMARY PHONE*: [SELECT] PRIMARY EMAIL: [SELECT]

PRIMARY FAX: [SELECT]

SEATING PREFERENCE: [Select Seating Preference] MEAL PREFERENCE: [None]

ADDRESS INFORMATION

INVOICE ADDRESS: [] COUNTRY: []

ADDRESS 2: [] STATE/PROVINCE: [v]

CITY: [] ZIP/POSTAL CODE: [] Use as bill to:

BILL TO ADDRESS: [] COUNTRY: [v]

ADDRESS 2: [] STATE/PROVINCE: [v]

CITY: [] ZIP/POSTAL CODE: []

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X
[v]	[]	[]	[]

OPTIONAL PASSPORT

NUMBER: [] ISSUING COUNTRY: [Not Specified] EXPIRY DATE: [] [v] [v] [v] [v] X

PASSPORT EXPIRY NOTIFICATION

[Cancel] [Create New Client]

CREATE NEW CLIENT

TITLE: [v] FIRST NAME*: [] MIDDLE NAME: [] LAST NAME*: [] GENDER*: [M] | [F]

DATE OF BIRTH: [] NATIONALITY: [Not Specified] KNOWN TRAVELER NUMBER: [] REDRESS NUMBER: []

SEND BIRTHDAY GREETING

PRIMARY ADVISOR: [Anna Kulej]

PRIMARY PHONE*: [SELECT] PRIMARY EMAIL: [SELECT]

PRIMARY FAX: [SELECT]

CREATE NEW CLIENT

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER* M F

DATE OF BIRTH NATIONALITY KNOWN TRAVELLER NUMBER REDRESS NUMBER

SEND BIRTHDAY GREETING

PRIMARY ADVISOR

PRIMARY PHONE* SELECT PRIMARY EMAIL SELECT

PRIMARY FAX SELECT

SEATING PREFERENCE MEAL PREFERENCE

ADDRESS INFORMATION

INVOICE ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE Use as bill to

BILL TO ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE
<input type="text"/>	<input type="text" value="Not Specified"/>	<input type="text"/> <input type="text"/> <input type="text"/>

PASSPORT EXPIRY NOTIFICATION

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE
<input type="text"/>	<input type="text" value="Not Specified"/>	<input type="text"/> <input type="text"/> <input type="text"/>

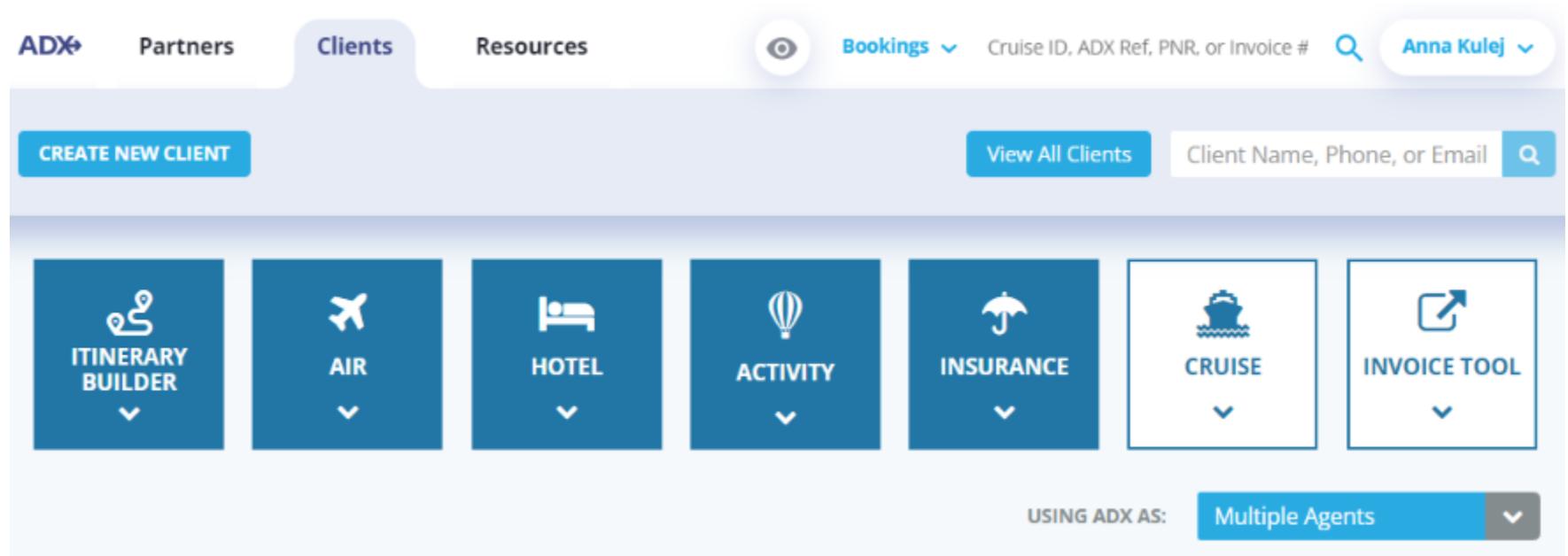
PASSPORT EXPIRY NOTIFICATION

1.2. REVIEW THE CLIENT FORM

The client form will gather basic client information required to book services in ADX. It will also allow for storage of extra information designed to make the booking and payment process easier.

Mandatory fields are marked with a * and include:

- First name
- Last name
- Ender
- Phone number



CREATE NEW CLIENT

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER* M | F

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER

SEND BIRTHDAY GREETING

PRIMARY ADVISOR

PRIMARY PHONE* PRIMARY EMAIL

PRIMARY FAX

SEATING PREFERENCE MEAL PREFERENCE

ADDRESS INFORMATION

INVOICE ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE Use as bill to

BILL TO ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

OPTIONAL PASSPORT

NUMBER ISSUING COUNTRY EXPIRY DATE X

PASSPORT EXPIRY NOTIFICATION

CREATE NEW CLIENT

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER* M | F

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER

SEND BIRTHDAY GREETING

PRIMARY ADVISOR

PRIMARY PHONE* PRIMARY EMAIL

PRIMARY FAX

	Steps		Notes
	Title		<ul style="list-style-type: none"> •
	First Name		<ul style="list-style-type: none"> • <i>Required field</i> • <i>Should match what is on the traveling docs ie. passport</i>
	Middle Name		<ul style="list-style-type: none"> • <i>Should match what is on the traveling docs</i>
	Last Name		<ul style="list-style-type: none"> • <i>Should match what is on the traveling docs</i>
	Gender		<ul style="list-style-type: none"> • <i>Required field</i>
	Date of Birth		<ul style="list-style-type: none"> • <i>Will determine maturity type for services such as air</i>
	Nationality		<ul style="list-style-type: none"> • <i>Will be passed on air bookings</i>
	Known Traveler Number		<ul style="list-style-type: none"> • <i>Will be passed on air bookings</i> • <i>Example: Global Entry, NEXUS</i>
	Redress Number		<ul style="list-style-type: none"> • <i>Will be passed on air bookings</i>
	Send Birthday Greetings		<ul style="list-style-type: none"> • <i>Birthday greeting email would go out of ADX automatically when box is checked</i> • <i>ADX will use the date of birth entered in the profile</i> • <i>Message can be customized in profile</i>
	Primary Phone		<ul style="list-style-type: none"> • <i>Must be unique to your client and not entered before</i> • <i>Mandatory field</i>
	Primary Email		<ul style="list-style-type: none"> •

	Primary Fax	•
--	-------------	---

CREATE NEW CLIENT

TITLE: FIRST NAME*: MIDDLE NAME: LAST NAME*: GENDER*: M F

DATE OF BIRTH: NATIONALITY: KNOWN TRAVELER NUMBER: REDRESS NUMBER:

SEND BIRTHDAY GREETING

PRIMARY ADVISOR:

PRIMARY PHONE*: PRIMARY EMAIL:

PRIMARY FAX:

SEATING PREFERENCE: MEAL PREFERENCE:

ADDRESS INFORMATION

INVOICE ADDRESS: COUNTRY:

ADDRESS 2: STATE/PROVINCE:

CITY: ZIP/POSTAL CODE: Use as bill to:

BILL TO ADDRESS: COUNTRY:

ADDRESS 2: STATE/PROVINCE:

CITY: ZIP/POSTAL CODE:

OPTIONAL LOYALTY PROGRAMS

TYPE: VENDOR: NUMBER:

OPTIONAL PASSPORT

NUMBER: ISSUING COUNTRY: EXPIRY DATE:

PASSPORT EXPIRY NOTIFICATION

SEATING PREFERENCE:

MEAL PREFERENCE:

ADDRESS INFORMATION

INVOICE ADDRESS:

COUNTRY:

ADDRESS 2:

STATE/PROVINCE:

CITY:

ZIP/POSTAL CODE: Use as bill to:

BILL TO ADDRESS:

COUNTRY:

ADDRESS 2:

STATE/PROVINCE:

CITY:

ZIP/POSTAL CODE:

	Steps		Notes
	Seating Preference		<ul style="list-style-type: none"> • <i>This does NOT get passed to the air record</i> • <i>It is meant as a note for the advisor</i>
	Meal Preference		<ul style="list-style-type: none"> • <i>Gets passed on to the air record</i>
	Invoice Address Information		<ul style="list-style-type: none"> • <i>Address that appears on client invoice</i> • <i>Click Use as Bill To if same as invoice address – will allow for easier entry on the payment page</i>
	Bill to Address		<ul style="list-style-type: none"> • <i>Used on payment page for credit card processing when available</i>

CREATE NEW CLIENT

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER*
M | F

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER
Not Specified

SEND BIRTHDAY GREETING

PRIMARY ADVISOR
Anna Kulej

PRIMARY PHONE* PRIMARY EMAIL
SELECT SELECT

PRIMARY FAX
SELECT

SEATING PREFERENCE MEAL PREFERENCE
Select Seating Preference None

ADDRESS INFORMATION

INVOICE ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE Use as bill to

BILL TO ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE			X
	Not Specified				

PASSPORT EXPIRY NOTIFICATION

Cancel

Create New Client

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE			X
	Not Specified				

PASSPORT EXPIRY NOTIFICATION

Cancel

Create New Client

	Steps		Notes
	Optional Loyalty Programs		<ul style="list-style-type: none"> • <i>Store loyalty information for all bookable services in ADX</i> • <i>Air, hotel loyalty info will automatically pass on to the booking if number is in the profile</i>
	Optional Passport		<ul style="list-style-type: none"> • <i>Will pass onto air bookings automatically</i>
	Passport Expiry Notification		<ul style="list-style-type: none"> • <i>Check box to have ADX send an automatic passport expiry reminder to the email on the profile</i> • <i>Passport information must be available on the profile</i> • <i>Email would go out 90 days before passport expiry</i>

1.3. CREATE A CLIENT PROFILE

A client profile only has to be **created ONCE** and it will be saved in the system for future use. A profile can be created from two different places:

- the Advisor Dashboard
- the Trip Services page

The form will be identical in terms of content, just a different starting point in the system.

1.3.1 From the Dashboard

Client can be created from the dashboard without having a quote in the system. The profile can be accessed at a later time and assigned to a quote as needed.

1. ADK Partners Clients Resources Bookings v Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej v

2. CREATE NEW CLIENT View All Clients Client Name, Phone, or Email

3. ITINERARY BUILDER AIR HOTEL ACTIVITY INSURANCE CRUISE INVOICE TOOL USING ADX AS: Multiple Agents

4. CREATE NEW CLIENT

CREATE NEW CLIENT

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER*

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER ADDRESS NUMBER

SEND BIRTHDAY GREETING

PRIMARY ADVISOR Anna Kulej

PRIMARY PHONE* PRIMARY EMAIL

PRIMARY FAX

SEATING PREFERENCE Select Seating Preference MEAL PREFERENCE None

ADDRESS INFORMATION

INVOICE ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE Use as bill to

BILL TO ADDRESS COUNTRY

ADDRESS 2 STATE/PROVINCE

CITY ZIP/POSTAL CODE

OPTIONAL LOYALTY PROGRAM

TYPE VENDOR NUMBER

OPTIONAL PASSPORT

NUMBER ISSUING COUNTRY EXPIRY DATE

PASSPORT EXPIRY NOTIFICATION

CREATE Create New Client

	Steps		Notes
1.	Press the CLIENTS tab		<ul style="list-style-type: none"> • Located at the top of the header • Section below will expand
2.	Press CREATE NEW CLIENT button		<ul style="list-style-type: none"> • This will open the create client form
3.	Fill in the client form		<ul style="list-style-type: none"> • Mandatory fields are indicated with an * (first name, last name, gender, phone number²)
4.	Press CREATE NEW CLIENT button at the bottom		<ul style="list-style-type: none"> • Client will be saved in TE Client Base • IF phone number already exists, you will see a validation error letting you know you can't create the client • IF you receive validation error, try searching for the client instead of creating a new one

² Phone number must be unique in Client Base

1.3.2 From the Trip Services Page

Client can be created directly from a quote and added to the reference. The client form will live under the “Client & Travelers” tab on the trip services page.

The image shows a screenshot of the ADX (Adventure Dynamics) interface. On the left, a quote page for a "Deluxe Travel Protection Plan Quote" is visible, with the advisor listed as Anna Kulej. The quote is for the dates Monday, May 30, 2022 - Friday, June 3, 2022. The quote reference is ADX Ref. 6NAAAX7. The quote page has tabs for "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". A "CLIENT AND TRAVELERS INFO" section is highlighted, containing a search bar for clients and a "New Client" button. A horizontal line is drawn across the quote page, and a vertical line is drawn from the "New Client" button to a "CREATE NEW CLIENT" modal form on the right.

The "CREATE NEW CLIENT" modal form contains the following fields:

- TITLE (dropdown)
- FIRST NAME* (text input)
- MIDDLE NAME (text input)
- LAST NAME* (text input)
- GENDER* (dropdown)
- DATE OF BIRTH (dropdown)
- NATIONALITY (dropdown, value: Not Specified)
- WINROW TRAVELER NUMBER (text input)
- ADDRESS NUMBER (text input)
- SEND BIRTHDAY GREETING
- PRIMARY ADVISOR (dropdown, value: Anna Kulej)
- PRIMARY PHONE* (dropdown)
- PRIMARY EMAIL (dropdown)
- PRIMARY FAX (dropdown)
- SEATING PREFERENCE (dropdown, value: Select Seating Preference)
- MEAL PREFERENCE (dropdown, value: None)
- ADDRESS INFORMATION (BILL TO ADDRESS):
 - ADDRESS (text input)
 - COUNTRY (dropdown)
 - ADDRESS 2 (text input)
 - STATE/PROVINCE (dropdown)
 - CITY (text input)
 - ZIP/POSTAL CODE (text input)
 - USA 44 04 00 (checkbox)
- OPTIONAL LOYALTY PROGRAMME:
 - TYPE (dropdown)
 - VENDOR (text input)
 - NUMBER (text input)
- OPTIONAL PASSPORT:
 - NUMBER (text input)
 - ISSUING COUNTRY (dropdown, value: Not Specified)
 - EXPIRY DATE (dropdown)
- PASSPORT EXPIRY NOTIFICATION

At the bottom right of the modal form, there are "Cancel" and "Create New Client" buttons.

	Steps		Notes
1.	Open the ADX reference		<ul style="list-style-type: none"> • <i>The trip services page for a specific trip</i>
2.	Press on the Clients & Travelers tab		<ul style="list-style-type: none"> • <i>Second in the list</i>
3.	Press the New Client button		<ul style="list-style-type: none"> • <i>Located on the right side</i> • <i>Will open the new client form</i>
4.	Fill in the client information on the form		<ul style="list-style-type: none"> • <i>Mandatory fields marked with an *</i>
5.	Press the CREATE NEW CLIENT button		<ul style="list-style-type: none"> • <i>Client will be saved in TE Client Base</i> • <i>IF phone number already exists, you will see a validation error letting you know you can't create the client</i> • <i>IF you receive validation error, try searching for the client instead of creating a new one</i>

	Steps	 Notes
6.	Press the NEW CLIENT button	<ul style="list-style-type: none"> • <i>This will open the create client form</i>
7.	Fill in the client form	<ul style="list-style-type: none"> • <i>Mandatory fields are indicated with an * (first name, last name, phone number³)</i> • <i>Optional fields include: title, birth dates, traveler numbers, email, fax, seating and meal preferences, invoice address, billing address, loyalty information, passport information</i> • <i>Information relevant to service bookings will get passed automatically on to the booking record</i>
8.	Check option to send birthday greeting and passport renewal reminder (optional)	<ul style="list-style-type: none"> • <i>Formatting of these emails can be reviewed through the advisor profile communication tab</i> • <i>Emails would get sent to client automatically IF check box is checked off</i>
9.	Press CREATE NEW CLIENT button at the bottom	<ul style="list-style-type: none"> • <i>Client will be saved in TE Client Base</i> • <i>IF phone number already exists, you will see a validation error letting you know you can't create the client</i> • <i>IF you receive validation error, try searching for the client instead of creating a new one</i>

³ Phone number must be unique in Client Base

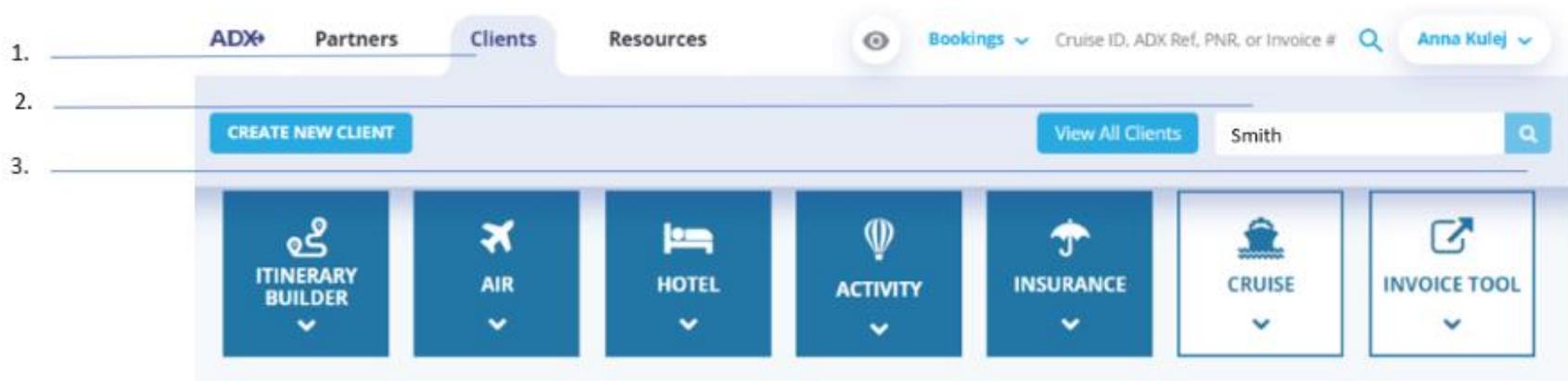
1.4. ACCESSING CLIENT PROFILES

Once a client is created, you can access the profile to manage and update content stored. The client profile can be accessed via the client search in the header or from the client profile link anytime a client is assigned to a trip.

CLIENT SEARCH RESULTS ×				
<input checked="" type="checkbox"/> ONLY VIEW MY CLIENTS				
Client	Email	Phone	Agent	
Miss Smith, Sarah	sarah@smith.com	416-444-4343	Anna Kulej	View
Mr. Smith, Jack M	jack@smith.com	5554641414	Anna Kulej	View
Ms. Smith, Sarah	sarah@j.com	5554445454	Anna Kulej	View
Mrs. Smith, Sarah A	saraha@smith.com	4164444443	Anna Kulej	View

1.4.1 Client Search

The client search box is accessible from any page in ADX via the CLIENTS section in the header. Existing clients can be searched by first name OR last name OR phone number OR email. The search criteria is limited to those search forms, entering FIRST LAST name will warrant no results. The client search will show a list of all clients that match the criteria. Once the list is available, you will be able to access the profile.



	Steps		Notes
1.	Press CLIENTS tab in the header		<ul style="list-style-type: none"> Section will expand down
2.	Enter search criteria		<ul style="list-style-type: none"> Search by <i>FIRST</i> or <i>LAST</i> name or <i>PHONE NUMBER</i> or <i>EMAIL</i> Searching by <i>FIRST LAST</i> will not show results Search must be specific to the format indicated
3.	Press  button		<ul style="list-style-type: none">

 CLIENT SEARCH RESULTS ✕

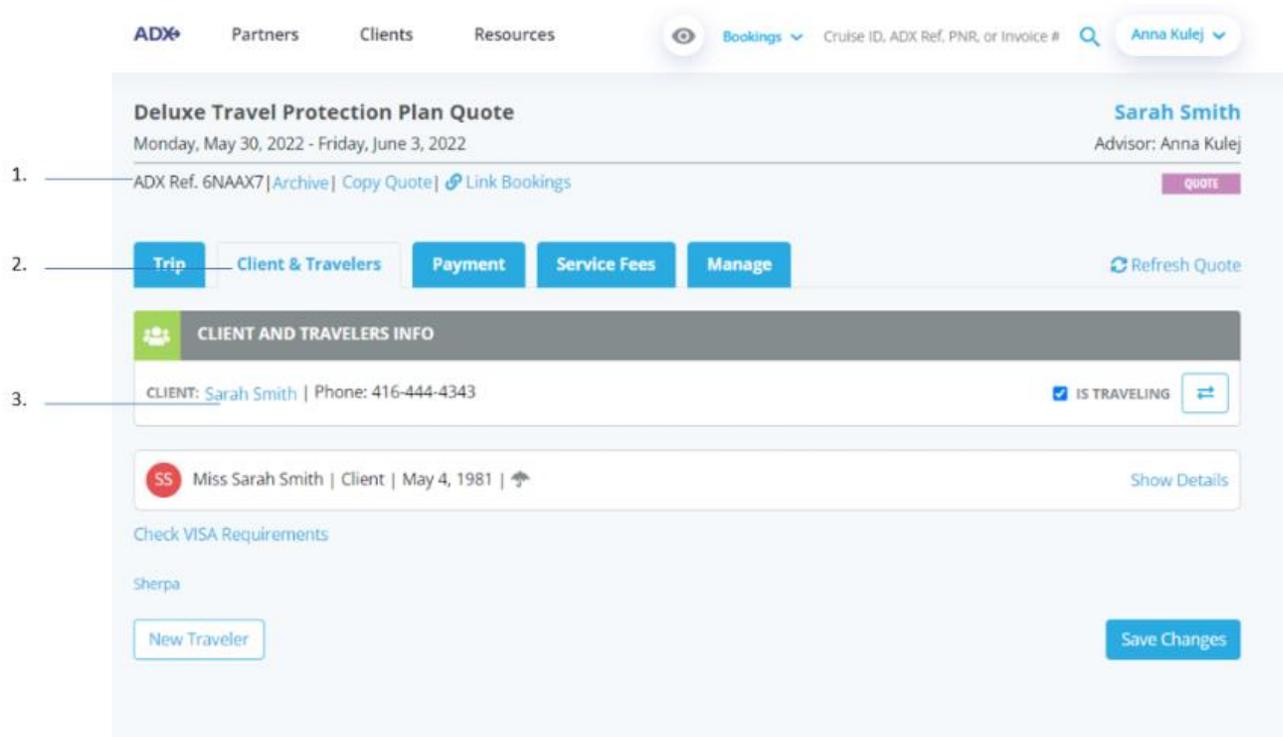
4. ONLY VIEW MY CLIENTS

Client	Email	Phone	Agent	
Mr. Smith, Michael		123-123-1567	Michael Maytag	View
Mrs. Smith, Norah Laura	n.s@smith.com	4164141441	Demo ADX	View
Mr. Smith, Jack	jack.smith@demo.com	313-956-7894	Demo ADX	View
Smith/John Corporate		2312314124421	Demo ADX	View
Mr. smith, sam		416-898-9633	Norah Rahamim	View
Mr. Smith, Brad		4144444444	Norah Rahamim	View
Mr. Smith, larry	dd@d.com	416-909-9999	Norah Rahamim	View

	Steps	 Notes
4.	Check the “Only View My Clients” check box – as needed	<ul style="list-style-type: none"> Client list will show all advisors clients who have opted to share within your branch To ONLY see your list of clients select the checkbox
5.	Locate the client in the list	<ul style="list-style-type: none">
6.	Press VIEW button	<ul style="list-style-type: none"> Will open the profile page for that client

1.4.2 Client Profile Link

A client profile can be accessed from the trip reference page, anytime a client is assigned to the trip.



	Steps	 Notes
1.	Open the ADX reference	<ul style="list-style-type: none"> • Trip Services page for specific trip
2.	Click on the Client and Travelers tab	<ul style="list-style-type: none"> • Once client is added the name will show in the client section
3.	Click on client name	<ul style="list-style-type: none"> • Client name will be a blue hyperlink • A new page will open with the client profile

1.5. VIEW COMPLETE CLIENT LIST

Advisor can search for a client from their FULL client list versus searching for a name.

The screenshot shows the ADX interface with the 'Clients' tab selected. The top navigation bar includes 'ADX', 'Partners', 'Clients', and 'Resources'. A search bar at the top right contains 'Anna Kulej'. Below the navigation bar, there is a 'CREATE NEW CLIENT' button and a 'View All Clients' button. A search input field is labeled 'Client Name, Phone, or Email'. Below these are seven service tiles: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A modal window titled 'ALL CLIENTS' is open, displaying a table of clients. The table has columns for Client, Email, Phone, and Advisor, and a 'View' button for each row. A 'Download All Excel Report' link and an alphabetical filter 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z' are also visible. A checkbox for 'ONLY VIEW MY CLIENTS' is checked.

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

2. CREATE NEW CLIENT View All Clients Client Name, Phone, or Email

3. ALL CLIENTS

4. Download All Excel Report A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ONLY VIEW MY CLIENTS

Client	Email	Phone	Advisor
Mr. April, Jeffery		5557773434	Anna Kulej
Mrs. Jones, Amy		5557775656	Anna Kulej
Ms. Kulej, Anna Last traveled 26 Nov 2017 7GW30N	akulej@gmail.com	4164147379	Anna Kulej
Traveledge Corporate Test Corporate		+1 (999) 999-9999	Anna Kulej

	Steps		Notes
1.	Press CLIENTS tab		<ul style="list-style-type: none"> • <i>Located in the header</i> • <i>Expands section down</i>
2.	Press VIEW ALL CLIENTS		<ul style="list-style-type: none"> • <i>List of ALL clients shared with you</i>
3.	Apply “Only View My Client’s” filter as needed		<ul style="list-style-type: none"> • <i>Clients for all advisors sharing in your office will show</i> • <i>Use filter to only see your own clients</i>
4.	Select letter of alphabet to jump to filter to		<ul style="list-style-type: none"> •

1.6. DOWNLOAD CLIENT LIST

You can download a full list of your client profiles in an Excel format with the following information: First/last name, DOB, email, phone number, mailing address, passport info (number and expiry), companion info (name and DOB).

The file will be stored in your DOWNLOADS folder on your computer.

The screenshot shows the ADX interface with a modal window titled 'ALL CLIENTS'. The modal contains a 'Download All Excel Report' button, a search bar with the text 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z', and a checkbox labeled 'ONLY VIEW MY CLIENTS'. Below this is a table with the following data:

Client	Email	Phone	Agent	
Mrs. April, Sammy		5558889898	aDX CADDemo	View
Ms. Jones, April		4167777778	aDX CADDemo	View

A	B	C	D	E	F	G	H
First Name	Last Name	Birth Date	Email	Phone	Mailing Address	Passport Info	Companion info
Sarah	Smith	APR 04 1970	sarah@smith.com	(416) 555-4545	123 St. , Ontario, Canada, M8M 3M3		Jackie Jones(Jun 03 1982); Sally Smith(Dec 09 2018); Sam Smith(Apr 03 1976)
Sammy	April			5558889898			
April	Jones			4167777778	66 South St. , California, United States, 90876		
Kelly	Jones	FEB 16 1982		7775555656			
Mandy	Jones	AUG 07 1992		5556665656			

	Steps		Notes
1.	Press CLIENT LOOKUP button	•	
2.	Press VIEW ALL CLIENTS	•	
3.	Press Download All Excel Report	•	<ul style="list-style-type: none"> File will download as an excel file Stored in your DOWNLOADS folder on your computer Will ONLY show your clients

1.7. CREATING AND MANAGING COMPANION PROFILES

Companions are created and housed under a primary client profile. Companions can be created from the client profile or on the fly on the trip reference. NOTE: Editing profile details will NOT update any active references. To update details on active trips please update the reference directly.

1.7.1 Create Companion Profiles – From Client Profile

The client profile page will have its own section for companions. Any companions created and stored under the profile will be accessible when applying travelers to a trip.

The screenshot shows the ADX client profile page for Miss Sarah Smith. The page includes navigation tabs (ADX, Partners, Clients, Resources), a search bar, and a user profile (Anna Kulej). The main content area is titled 'Miss Sarah Smith' and includes a 'Companions' section with a 'New Companion' button. A table lists existing companions: Ms. Amanda Jones (Friend, 5 July 1987) and Mr. Gordon Jones (Other, 19 November 2000). A 'NEW COMPANION FOR SARAH SMITH' form is shown below, with fields for relationship, name, gender, date of birth, nationality, and optional loyalty/passport information.

1. Miss Sarah Smith 4 May 1981, Female | 416-444-4343 | sarah@smith.com

2. Client Information
Companions
Additional Details and Preferences

3. Companions

NAME	RELATIONSHIP	BIRTHDAY	
Ms. Amanda Jones	Friend	5 July 1987	Edit
Mr. Gordon Jones	Other	19 November 2000	Edit

4. NEW COMPANION FOR SARAH SMITH

5. RELATIONSHIP TO CLIENT*
Select Relationship

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER*
 M F

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER

SEATING PREFERENCE MEAL PREFERENCE
 Select Seating Preference None

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE	X
<input type="text"/>	Not Specified	<input type="text"/>	<input type="checkbox"/>

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

	Steps		Notes
1.	Open client profile		<ul style="list-style-type: none"> • <i>Pull up profile by client info OR view all search</i>
2.	Click COMPANIONS tab		<ul style="list-style-type: none"> • <i>Tabs located on LEFT side</i>
3.	Click NEW COMPANION button		<ul style="list-style-type: none"> • <i>Will open a form</i>
4.	Select relationship type from list		<ul style="list-style-type: none"> • <i>Relationship must be established</i> • <i>Select one option from the list</i>
5.	Fill out companion information		<ul style="list-style-type: none"> • <i>Mandatory fields are first name, last name, gender</i>
6.	Click SAVE PROFILE		<ul style="list-style-type: none"> • <i>Companion will now show in companion list</i>

1.7.2 Create Companion Profiles – From Trip Reference

A companion can be created from the trip services page once a client is attached to a trip.

The screenshot shows the ADX system interface for managing a trip. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar with the user name 'Anna Kulej'. The main heading is 'One Way Flight: Los Angeles to New York' with the dates 'Wednesday, May 25, 2022 - Wednesday, May 25, 2022'. The advisor is 'Sarah Smith' and the advisor name is 'Anna Kulej'. A 'QUOTE' button is visible.

1. A line points to the 'ADX Ref. 2IFXZW' text, which includes links for 'Archive', 'Copy Quote', and 'Link Bookings'.

2. A line points to the 'CLIENT AND TRAVELERS INFO' section, which shows 'CLIENT: Sarah Smith | Phone: 416-444-4343' and an 'IS TRAVELING' checkbox.

3. A line points to the 'TITLE' dropdown menu in the traveler information form.

4. A line points to the 'SAVE AS COMPANION' checkbox in the traveler information form.

5. A line points to the 'New Traveler' button at the bottom left and the 'Save Changes' button at the bottom right.

The traveler information form includes fields for: TITLE, FIRST NAME, MIDDLE NAME (optional), LAST NAME, GENDER (M/F), DATE OF BIRTH, NATIONALITY, PASSPORT NUMBER, REDRESS NUMBER, ISSUING COUNTRY, KNOWN TRAVELER NUMBER, and EXPIRY DATE. A 'Remove Traveler' button is located at the bottom right of the form.

	Steps		Notes
1.	Open ADX reference		<ul style="list-style-type: none"> • <i>Pull up profile by client info OR view all search</i>
2.	Assign Client to itinerary		<ul style="list-style-type: none"> • <i>Search by first name OR last name OR phone number OR email</i> • <i>Create new client using the New Client Form</i>
3.	Fill in companion information into traveler section		<ul style="list-style-type: none"> •
4.	Check the Save as Companion checkbox		<ul style="list-style-type: none"> • <i>This will save the new companion profile to the client assigned to this record</i>
5.	Save Changes		<ul style="list-style-type: none"> • <i>Relationship must be established</i> • <i>Select one option from the list</i>

1.7.3 Edit/Delete Companion Profiles

Existing companion information can be edited or deleted from the primary client profile.

The screenshot shows the ADX client profile for Miss Sarah Smith. The main navigation includes ADX, Partners, Clients, Resources, Bookings, and a search bar. The client profile header shows the name and contact information. Below this are service buttons for Itinerary Builder, Air, Hotel, Activity, Insurance, Cruise, and Invoice Tool. A sidebar menu on the left contains Client Information, Companions, Additional Details and Preferences, and Loyalty Programs. The main content area displays a table of companions with columns for Name, Relationship, and Birthday. A modal window titled 'EDIT COMPANIONS: GORDON JONES (OTHER OF SARAH SMITH)' is open, showing a form to edit the companion's details. The form includes fields for Relationship to Client, Title, First Name, Middle Name, Last Name, Gender, Date of Birth, Nationality, Known Traveller Number, Address Number, Seating Preference, Meal Preference, Optional Loyalty Programs, and Optional Passport.

1. Miss Sarah Smith 4 May 1981, Female | 416-444-4343 | sarah@smith.com

2. Client Information

3. Companions

4. Additional Details and Preferences

5. Loyalty Programs

NAME	RELATIONSHIP	BIRTHDAY	
Ms. Amanda Jones	Friend	5 July 1987	Edit
Mr. Gordon Jones	Other	19 November 2000	Edit
Ms. Grata Jones	Son	4 May 1988	Edit

EDIT COMPANIONS: GORDON JONES (OTHER OF SARAH SMITH)

RELATIONSHIP TO CLIENT*

Other

TITLE FIRST NAME* MIDDLE NAME LAST NAME* GENDER*

Mr. Gordon Middle Name Jones M | F

DATE OF BIRTH NATIONALITY KNOWN TRAVELLER NUMBER ADDRESS NUMBER

19 Nov 2000 United States

SEATING PREFERENCE MEAL PREFERENCE

Select Seating Preference None

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE
	Not Specified	

Cancel Delete Companion Save Profile

	Steps		Notes
1.	Open client profile		<ul style="list-style-type: none"> • <i>Pull up profile by client info OR view all function</i>
2.	Press COMPANIONS tab		<ul style="list-style-type: none"> • <i>Tabs located on LEFT side</i>
3.	Press EDIT button		<ul style="list-style-type: none"> • <i>Located next to existing companion name</i>
4.	Edit information (if applicable)		<ul style="list-style-type: none"> •
5.	Press Save Profile OR Delete Companion button		<ul style="list-style-type: none"> •

1.8. CLIENT MARKETING

Set Travel Edge **marketing fields** through the client profile page.

Marketing fields are NOT preset and need to be manually added to each client profile. For clients to receive their **complimentary monthly marketing Arrive publication**, you MUST fill in the marketing fields in ADX and select the TE Marketing option in the form. If the TE Marketing option is not checked, the Arrive publication does not get distributed.

The more information you can include on a client the more marketing can drill down to the type of marketing material that should be sent to your client.

The screenshot shows the ADX interface for a client profile. At the top, there are navigation tabs: ADX, Partners, Clients, and Resources. A search bar contains the text "Bookings" and "Cruise ID, ADX Ref, PNR, or Invoice #". The user's name "Anna Kulej" is visible in the top right. The client profile for "Miss Sarah Smith" is displayed, with her birth date "4 May 1981, Female" and contact information "416-444-4343 | sarah@smith.com". Below the profile header are seven blue buttons with icons and labels: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. The "Marketing Fields" section is active, showing a list of fields with their values and edit options. The fields are: Age Category (Under 35), Total Trip Budget (Up to \$3,000), Client Status (VIP), and Marketing (TE Marketing). Each field has an "Edit" link. There is also an "Opt-out" link in the top right of the Marketing Fields section.

Field	Value	Action
Age Category	Under 35	Edit
Total Trip Budget	Up to \$3,000	Edit
Client Status	VIP	Edit
Marketing	TE Marketing	Edit

1.8.1 Adding Marketing fields

A new client profile will default to NO fields being active. Advisor will set these manually on each client profile.

1. Miss Sarah Smith 4 May 1981, Female | 416-444-4343 | sarah@smith.com

2. Marketing Fields

3. Notes

Marketing Fields

Travel Edge markets to your clients on your behalf based on the options you choose. If you would prefer Travel Edge to not market to your clients, please click 'opt-out'.

There are no Marketing fields selected for this client yet.

Get Started

EDIT MARKETING FIELDS

1. Age Category

OVER 65 UNDER 35 36-50

51 TO 65

2. Total Trip Budget

UP TO \$3,000 \$3,000 - \$8,000 \$8,000 - \$15,000

\$15,000 +

3. Trip Duration

1-4 DAYS 5-10 DAYS 11-20 DAYS

21 DAYS +

4.

Cancel Save

5.

	Steps		Notes
1.	Search and select client profile		<ul style="list-style-type: none"> • <i>See Client Lookup section</i>
2.	Click on Marketing Fields tab		<ul style="list-style-type: none"> •
3.	Click GET STARTED		<ul style="list-style-type: none"> • <i>Will open the marketing form with options</i>
4.	Click checkboxes to set marketing field		<ul style="list-style-type: none"> •
5.	Press SAVE		<ul style="list-style-type: none"> • <i>Profile will reflect the fields selected</i>

1.8.2 Editing Marketing Fields

The marketing fields can be edited at any time. You can edit a section in the form OR open the entire form to edit as a whole.

The screenshot shows the ADX client profile for Miss Sarah Smith. The page includes navigation tabs (Partners, Clients, Resources), a search bar, and a profile header with contact information. Below the header are seven tool buttons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A sidebar on the left contains a menu with options: Client Information, Companions, Additional Details and Preferences, Loyalty Programs, Marketing Fields (highlighted), and Notes. The main content area displays the Marketing Fields section, which includes an 'Opt-out' link and a list of fields with 'Edit' links. A red box highlights the 'Edit' links for each field.

1. Miss Sarah Smith 4 May 1981, Female | 416-444-4343 | sarah@smith.com

2. Marketing Fields

3. Marketing Fields

Marketing Fields		Opt-out	Edit
Travel Edge markets to your clients on your behalf based on the options you choose. If you would prefer Travel Edge to not market to your clients, please click 'opt-out'.			
Age Category	36-50		Edit
Client Status	VIP		Edit
Life Cycle	Married		Edit
Marketing	TE Marketing		Edit
Interests	All Inclusive, Birding, Hiking		Edit

	Steps		Notes
1.	Search and select client profile		<ul style="list-style-type: none"> • <i>See Client Lookup section</i>
2.	Click on Marketing Fields tab		<ul style="list-style-type: none"> •
3.	Press EDIT		<ul style="list-style-type: none"> • <i>Edit at the top of the form opens the whole form</i> • <i>Edit next to section opens that section on the form</i>

1.8.3 Opt Out Option

Select the opt out option if you've previously selected marketing categories however your client no longer wants to receive any further communication from Travel Edge. This will remove all fields from the form automatically.

Client Information	Marketing Fields 🚫 Opt-out ✎ Edit
Companions	Travel Edge markets to your clients on your behalf based on the options you choose. If you would prefer Travel Edge to not market to your clients, please click 'opt-out'.
Additional Details and Preferences	Age Category 36-50 ✎ Edit
Loyalty Programs	Total Trip Budget \$3,000 - \$8,000 ✎ Edit
Marketing Fields	Trip Duration 5-10 days ✎ Edit



If your client does not want marketing emails, then please click the 'Confirm' button to remove all the selected fields.

1.9. ASSIGNING CLIENT AND COMPANIONS TO A TRIP

Once your client and companion profiles are created and you have a quote in ADX, you will be able to assign the client and companion to the itinerary and assign travelers to each service. After you assign the primary client to the itinerary, you can indicate that the client is traveling and easily pull in relevant information OR add travelers from your companion list.

The screenshot displays the ADX interface for a flight quote. At the top, there are navigation links: ADX, Partners, Clients, Resources, Bookings, and a search bar for Cruise ID, ADX Ref, PNR, or Invoice #. The user's name, Anna Kulej, is shown in the top right. The main heading is "One Way Flight: Los Angeles to New York" with the dates "Sunday, July 17, 2022 - Monday, July 18, 2022" and the advisor "Advisor: Anna Kulej". Below this, there are links for "ADX Ref. 10090V", "Archive", "Copy Quote", and "Link Bookings", along with a "QUOTE" button. A navigation bar contains buttons for "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage", with a "Refresh Quote" button on the right. A section titled "CLIENT AND TRAVELERS INFO" features a search bar labeled "CLIENT:" with the placeholder text "Search by name, phone, or email" and a magnifying glass icon, followed by a "+ New Client" button. Below the search bar, there is a message: "Please select a client prior to specifying travelers." and a link for "Check VISA Requirements". At the bottom, the word "Sherpa" is visible.

1. ADX Ref. 10090V | Archive | Copy Quote | Link Bookings
2. Trip | Client & Travelers | Payment | Service Fees | Manage
3. CLIENT: Search by name, phone, or email | + New Client

	Steps		Notes
1.	Open the ADX reference	•	
2.	Click the CLIENT AND TRAVELERS tab	•	
3.	Add client	•	<ul style="list-style-type: none"> • <i>Pull in existing client by entering first name OR last name OR phone number OR email into the search</i> • <i>Create a new client</i>

1.9.1 Client as Traveler

When the client is a traveler on the itinerary, check the IS TRAVELING checkbox to automatically pull in relevant information into the traveler section.

The screenshot displays the 'CLIENT AND TRAVELERS INFO' section of the ADX interface. At the top, there are navigation tabs: Trip, Client & Travelers, Payment, Service Fees, and Manage. The 'CLIENT AND TRAVELERS INFO' section includes a client summary line with the name 'Sarah Smith' and phone number '416-444-4343', and a checked 'IS TRAVELING' checkbox. Below this is a section for 'CONTACT INFORMATION FOR YOUR TRIP' with a note: 'Unique data is entered per traveler, see fields below or clear and use client details for all travelers.' The main form contains fields for personal information: Title (Miss), First Name (Sarah), Middle Name (optional), Last Name (Smith), Gender (Female), Date of Birth (4 May 1981), Nationality (United States), and a 'SAVE AS CLIENT' button. It also includes fields for Passport Number (123448), Address Number, Home Country (United States), and Known Traveler Number (000012345). There is an 'EXPIRY DATE' field set to 7 Jul 2028. A section for 'One-way Los Angeles to New York' includes fields for Contact Email Address and Contact Phone Number, with a note: 'Using individual contact information - clear and use client details for all travelers.' Below this are fields for Seating Preference (Aisle), Meal Preference (None), Loyalty Airline (AA, BA), and Loyalty # (12345, 123456). At the bottom, there are buttons for '+ Add Airline Loyalty Program', '+ Add/View Special Instructions', and 'Remove Traveler'. A 'Check Visa Requirements' link is also present. At the very bottom, there are buttons for 'New Traveler', 'Save Changes', 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

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

One Way Flight: Los Angeles to New York

Sunday, July 17, 2022 - Monday, July 18, 2022

ADX Ref: 100BoV | Archive | Copy Quote | Link Bookings

Sarah Smith
Advisor: Anna Kulej

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

CLIENT AND TRAVELERS INFO

CLIENT: Sarah Smith | Phone: 416-444-4343 IS TRAVELING

CONTACT INFORMATION FOR THIS TRIP: Unique data is entered per traveler, see fields below or clear and use client details for all travelers.

Miss Sarah Smith | Client | May 4, 1981 | Show Details

Check VISA Requirements

Sherra

New Traveler Save Changes

4.

	Steps		Notes
1.	Check the "IS TRAVELING" checkbox		<ul style="list-style-type: none"> Available once the client has been assigned to the itinerary Once checked the client details will pull into the traveler box
2.	Verify the traveler information		<ul style="list-style-type: none">
3.	Press SAVE CHANGES		<ul style="list-style-type: none"> The form will close
4.	Verify traveler information is saved		<ul style="list-style-type: none"> Traveler name should be the same as client name

1.9.2 Companion as Traveler

A client's companion can be assigned as a traveler on any itinerary by pulling from the companion list.

The screenshot shows a travel booking system interface. At the top, there are navigation tabs: "Partners", "Clients", "Resources", "Bookings", and "Cruise ID, ADX Ref, PNR, or Invoice #". A user profile "Anna Kulej" is visible in the top right. The main heading is "One Way Flight: Los Angeles to New York" with dates "Monday, June 20, 2022 - Tuesday, June 21, 2022". The client name "Sarah Smith" and advisor "Anna Kulej" are listed. Below this are tabs for "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". A "Refresh Quote" button is also present.

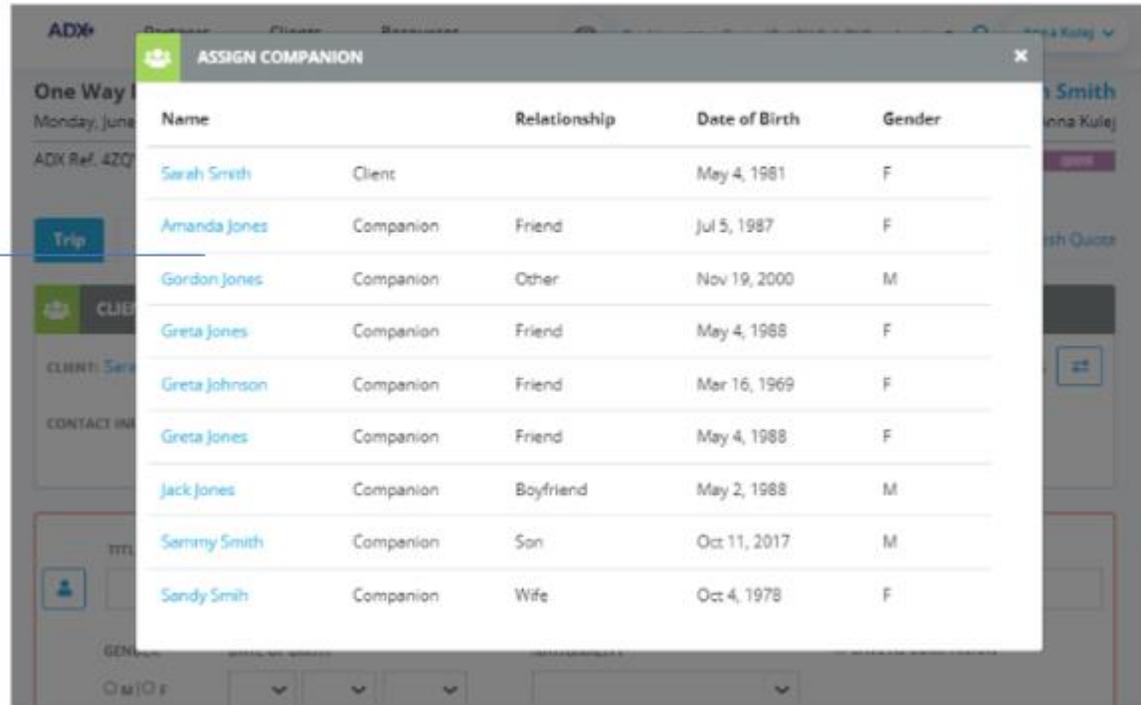
Section 1 (indicated by a blue line and the number "1.") is titled "CLIENT AND TRAVELERS INFO". It contains the client information: "CLIENT: Sarah Smith | Phone: 416-444-4342" and a checkbox labeled "IS TRAVELING". Below this is a note: "CONTACT INFORMATION FOR THIS TRIP: Unique data is entered per traveler, see fields below or clear and use client details for all travelers."

Section 2 (indicated by a blue line and the number "2.") is a form to add a traveler. It includes fields for "TITLE", "FIRST NAME", "MIDDLE NAME optional", and "LAST NAME". There are also fields for "GENDER" (M/F), "DATE OF BIRTH", "NATIONALITY", and a checkbox "SAVE AS COMPANION". Further down are fields for "PASSPORT NUMBER", "ADDRESS NUMBER", "ISSUING COUNTRY", and "KNOWN TRAVELER NUMBER". An "EXPIRY DATE" field is also present. Below these fields is a section for the flight: "One-way Los Angeles to New York" with a "DEFER" button. This section includes "CONTACT EMAIL ADDRESS" and "CONTACT PHONE NUMBER" fields, with a note: "Using individual contact information - clear and use client details for all travelers." There are also dropdown menus for "SEATING PREFERENCE" and "MEAL PREFERENCE". At the bottom of the form are buttons for "+ Add Airline Loyalty Program" and "+ Add/View Special Instructions", and a "Remove Traveler" link.

At the bottom of the page, there are links for "Check USA Requirements", "Share", "New Traveler", and "Save Changes".

	Steps		Notes
1.	Assign client	•	
2.	Click the  icon	•	<i>This will open the companion list associated with the client</i>

3.



 Steps	 Notes
3. Click the companion name	<ul style="list-style-type: none">Click the name in blue to add to the service

ADP Partners Clients Resources Bookings Cruise ID, ADI Ref, PNR, or Invoice # Anna Riley

One Way Flight: Los Angeles to New York Sarah Smith
 Monday, June 20, 2022 - Tuesday, June 21, 2022 Advisor: Anna Riley

ADP Ref: 420YTZ | Archive | Copy Quotes | Link Bookings View

Trip Class & Travellers Payment Service Fees Manage Refresh Quote

CLIENT AND TRAVELERS INFO

Client: Sarah Smith | Phone: 416-444-4342 IS TRAVELING OFF

CONTACT INFORMATION FOR THIS TRIP: Unique data is entered per traveler, see fields below or clear and use client details for all travelers.

TITLE: OFF Ms. FIRST NAME: MIDDLE NAME: (optional) LAST NAME:

SEX: Clear Male Female GENDER: Male DATE OF BIRTH: NATIONALITY: Save as combination

PASSPORT NUMBER: RESIDENCE NUMBER:

ISSUING COUNTRY: KNOWN TRAVELER NUMBER:

EXPIRY DATE:

+ One-way Los Angeles to New York View

CONTACT EMAIL ADDRESS: CONTACT PHONE NUMBER:

Using individual contact information - clear and use client details for all travelers.

SMILING PREFERENCES: MAIL PREFERENCES:

+ Add Airline Loyalty Program
+ Add New Special Instructions

Remove Traveler

Check VISA Requirements

Traveler: Save Changes

Add ADP Service + Add non ADP Service + Send Itinerary

4.

5.

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

One Way Flight: Los Angeles to New York Sarah Smith
 Monday, June 20, 2022 - Tuesday, June 21, 2022 Advisor: Anna Kulej
 ADX Ref. 4ZQYTY | Archive | Copy Quote | Link Bookings QUOTE

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

CLIENT AND TRAVELERS INFO

CLIENT: Sarah Smith | Phone: 416-444-4343 IS TRAVELING ⇄

CONTACT INFORMATION FOR THIS TRIP: Unique data is entered per traveler, see fields below or clear and use client details for all travelers.

6. GJ Ms. Greta Jones | Companion | May 4, 1988 | Show Details

[Check VISA Requirements](#)

Sherpa

New Traveler Save Changes

	Steps	 Notes
4.	Verify information	<ul style="list-style-type: none"> Companion information will automatically populate
5.	Press SAVE CHANGES	<ul style="list-style-type: none"> Save the traveler information to associate it with the service
6.	Verify traveler added	<ul style="list-style-type: none">