



Quick Guide –
Creating 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.

The screenshot displays the ADX interface for a client profile. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a dropdown for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right.

The client profile for 'Mr. Sam Smith' (23 March 1990, Male, ID: 5554445555) is shown. It features a row of tool icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL.

The 'Client Information' section includes a sidebar with 'Companions', 'Additional Details and Preferences', 'Loyalty Programs', 'Marketing Fields', and 'Notes'. The main area lists personal details (NAME, BIRTHDAY, GENDER, PHONE, ADVISOR) and address information (INVOICE ADDRESS, BILLING ADDRESS). It also shows 'UPCOMING TRIP' (19 May 2022, 3E2TPT) and 'LAST TRAVELED' (10 April 2022, 51M4NW).

The 'QUOTES & BOOKINGS FOR MR. SAM SMITH' section has tabs for 'All', 'Trips', 'Quotes', and 'Archived'. A table lists various quotes and bookings with columns for Status, Advisor, Client, Quote Name, Depart, Services, and Updated. The table includes a pagination control showing 'Results: 1 - 5 of 78'.

At the bottom, there are sections for 'Sent Emails (5)' and 'Notifications (13)'. A table shows email details with columns for SENT DATE, EMAIL TYPE, ADX REF, EMAIL SUBJECT, and EMAIL ADDRESS.

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS
11 Jan 2022	Quote	7X6E3	Ritz Carlton Marina Del Rey	michael.guber@traveledge.com
5 Jan 2022	Quote	1QJGDA	Residence Inn Downtwn Marriott - 1 nights	anisha.ramathal@triparc.com
7 Oct 2021	Quote	6P5Go5	One Way Flight: Los Angeles to London	smith@smith.com

¹ Clients ONLY pulled and stored in Travel Edge CB

1.1. 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* (M | F)

DATE OF BIRTH NATIONALITY Not Specified KNOWN TRAVELER NUMBER ADDRESS NUMBER

SEND BIRTHDAY GREETING

PRIMARY ADVISOR Anna Kulej

PRIMARY PHONE* PRIMARY EMAIL

SELECT SELECT

PRIMARY FAX

SELECT

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 PROGRAMME

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 system interface. On the left, a quote page for a "Deluxe Travel Protection Plan Quote" is visible, with an advisor named 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, showing a search bar for clients and a "New Client" button. Below the search bar, there is a message: "Please select a client prior to specifying travelers. Check VISA Requirements. Sherpa".

On the right, a "CREATE NEW CLIENT" modal form is open. The form contains the following fields and sections:

- PERSONAL INFORMATION:** TITLE, FIRST NAME*, MIDDLE NAME, LAST NAME*, GENDER* (with icons for M and F).
- CONTACT INFORMATION:** DATE OF BIRTH, NATIONALITY (Not Specified), RESERVATION NUMBER, ADDRESS NUMBER.
- CLIENT PREFERENCE:** SEND BIRTHDAY GREETING.
- ASSIGNMENT:** PRIMARY ADVISOR (Anna Kulej), PRIMARY PHONE* (SELECT), PRIMARY EMAIL (SELECT).
- SEATING AND MEAL PREFERENCE:** SEATING PREFERENCE (Select Seating Preference), MEAL PREFERENCE (None).
- ADDRESS INFORMATION:** INVOICE ADDRESS, ADDRESS 2, CITY, COUNTRY, STATE/PROVINCE, ZIP/POSTAL CODE, USE BILL TO (checkbox).
- BILL TO ADDRESS:** ADDRESS 2, CITY, COUNTRY, STATE/PROVINCE, ZIP/POSTAL CODE.
- OPTIONAL LOYALTY PROGRAM:** TYPE, VENDOR, NUMBER.
- OPTIONAL PASSPORT:** NUMBER, ISSUING COUNTRY (Not Specified), EXPIRY DATE.
- PASSPORT EXPIRY NOTIFICATION.

At the bottom right of the modal, 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