



Quick Guide –  
Accessing 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 ADX<sup>1</sup>. 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 is present with the text 'Bookings' and a dropdown menu for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right.

The main profile header for 'Mr. Sam Smith' includes his birthdate '23 March 1990', gender 'Male', and ID '5554445555'. Below this are several tool icons: 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'.

The 'Client Information' section is divided into two columns. The left column contains a list of tabs: 'Companions', 'Additional Details and Preferences', 'Loyalty Programs', 'Marketing Fields', and 'Notes'. The right column displays the following details:

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

Below the client information is a section titled 'QUOTES & BOOKINGS FOR MR. SAM SMITH'. It features tabs for 'All', 'Trips', 'Quotes', and 'Archived'. A table lists the following items:

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	<a href="#">View</a>
<input type="checkbox"/>	ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	11.05.22		02.05.22	<a href="#">View</a>
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Seattle Airport Marriott	19.05.22		02.05.22	<a href="#">View</a>
<input type="checkbox"/>	PART BOOKED	AK	Sam Smith	Round Trip Flights: Los Angeles ...	12.06.22		26.04.22	<a href="#">View</a>
<input type="checkbox"/>	BOOKED N/A	AK	Sam Smith	The Regent Resort Chiang Mai	18.04.22		17.01.22	<a href="#">View</a>

At the bottom of the table, it shows 'Results: 1 - 5 of 78' with pagination controls.

Below the quotes section are two tabs: 'Sent Emails (5)' and 'Notifications (13)'. The 'Sent Emails' tab is active, showing a table with the following data:

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

<sup>1</sup> Clients ONLY pulled and stored in Travel Edge CB

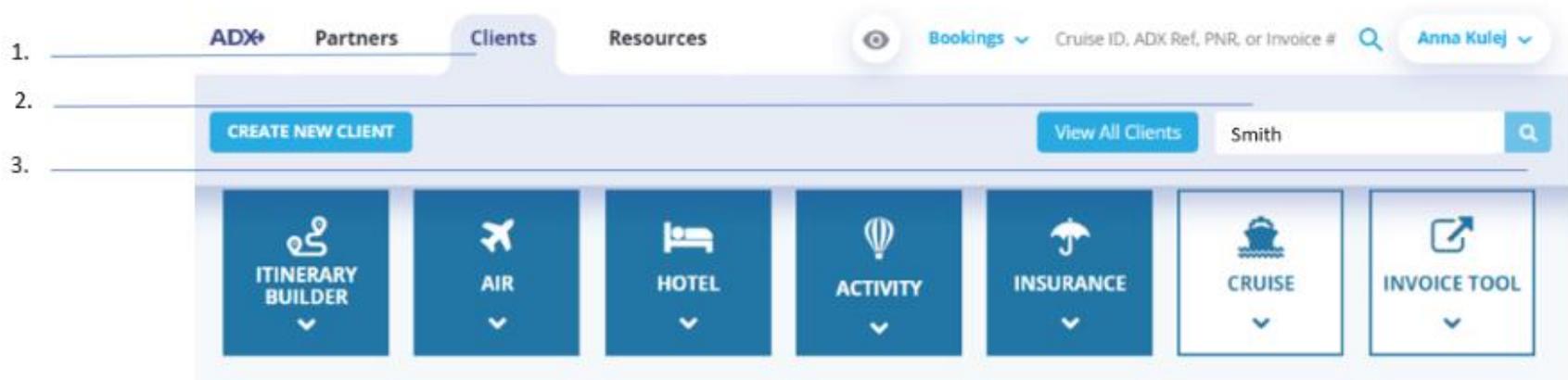
### 1.1. ACCESSING CLIENT PROFILES

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

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

 CLIENT SEARCH RESULTS ✕

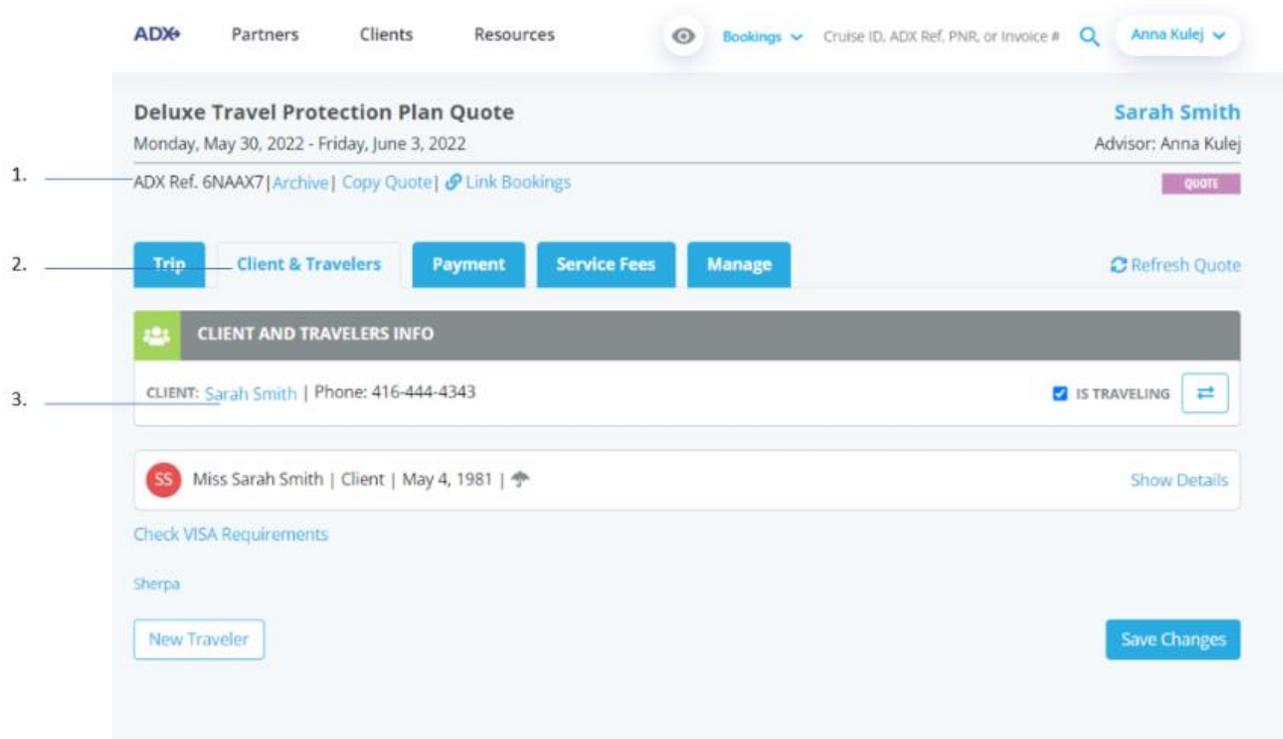
4.  ONLY VIEW MY CLIENTS

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

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

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

