



Quick Guide –  
Companion 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 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' (DOB: 23 March 1990, Male, ID: 5554445555) is shown. Below the name are several 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 shows:
 

- 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

The 'QUOTES & BOOKINGS FOR MR. SAM SMITH' section has tabs for 'All', 'Trips', 'Quotes', and 'Archived'. A table lists the following items:
 

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated	View
<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>

 Results: 1 - 5 of 78

The bottom section shows 'Sent Emails (5)' and 'Notifications (13)'. A table lists the following emails:
 

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS	View
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. 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.

### 1.5.1 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 modal form titled 'NEW COMPANION FOR SARAH SMITH' is open, showing fields for relationship, name, gender, date of birth, nationality, and optional loyalty programs and 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	<a href="#">Edit</a>
Mr. Gordon Jones	Other	19 November 2000	<a href="#">Edit</a>

4. NEW COMPANION FOR SARAH SMITH

5. RELATIONSHIP TO CLIENT\*  
Select Relationship

TITLE FIRST NAME\* MIDDLE NAME LAST NAME\* GENDER\*  
[Dropdown] [Text] [Text] [Text] [Radio M] [Radio F]

DATE OF BIRTH NATIONALITY KNOWN TRAVELER NUMBER REDRESS NUMBER  
[Dropdown] [Dropdown] [Text] [Text]

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

OPTIONAL LOYALTY PROGRAMS

TYPE	VENDOR	NUMBER	X
[Dropdown]	[Text]	[Text]	[Text]

OPTIONAL PASSPORT

NUMBER	ISSUING COUNTRY	EXPIRY DATE	X
[Text]	Not Specified [Dropdown]	[Dropdown] [Dropdown]	[Text]

6. [Cancel] Save Profile

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

### 1.5.2 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 for Cruise ID, ADX Ref, PNR, or Invoice #. The user is logged in as Anna Kulej. The main heading is "One Way Flight: Los Angeles to New York" for the dates Wednesday, May 25, 2022 - Wednesday, May 25, 2022. The advisor is Sarah Smith, with Anna Kulej as the advisor. A "QUOTE" button is visible. Below this, there are tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. A "Refresh Quote" button is also present. The "CLIENT AND TRAVELERS INFO" section shows the client as Sarah Smith with phone number 416-444-4343 and an "IS TRAVELING" checkbox. A note states: "CONTACT INFORMATION FOR THIS TRIP: Unique data is entered per traveler, see fields below or clear and use client details for all travelers." The main form area contains fields for: TITLE (dropdown), FIRST NAME, MIDDLE NAME (optional), LAST NAME, GENDER (radio buttons for M, O, F), DATE OF BIRTH (dropdowns for day, month, year), NATIONALITY (dropdown), PASSPORT NUMBER, REDRESS NUMBER, ISSUING COUNTRY (dropdown), KNOWN TRAVELER NUMBER, and EXPIRY DATE (dropdowns for day, month, year). There is a "SAVE AS COMPANION" checkbox and a "Remove Traveler" link. At the bottom, there are links for "Check VISA Requirements", "Sherpa", and a "New Traveler" button. A "Save Changes" button is located at the bottom right.

1. ADX Ref. 2IFXZW | Archive | Copy Quote | Link Bookings
2. CLIENT: Sarah Smith | Phone: 416-444-4343
3. TITLE, FIRST NAME, MIDDLE NAME optional, LAST NAME
4. GENDER, DATE OF BIRTH, NATIONALITY, PASSPORT NUMBER, REDRESS NUMBER, ISSUING COUNTRY, KNOWN TRAVELER NUMBER, EXPIRY DATE
5. New Traveler

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

### 1.5.3 Edit/Delete Companion Profiles

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

The screenshot shows the ADX interface for a client profile. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar. The client profile for Miss Sarah Smith is displayed, with a navigation menu on the left containing Client Information, Companions, Additional Details and Preferences, and Loyalty Programs. The main area shows a list of companions with columns for Name, Relationship, and Birthday. A modal form titled 'EDIT COMPANIONS: GORDON JONES (OTHER OF SARAH SMITH)' is open, allowing for editing of the companion's details.

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	<a href="#">Edit</a>
Mr. Gordon Jones	Other	19 November 2000	<a href="#">Edit</a>
Ms. Grata Jones	Son	4 May 1988	<a href="#">Edit</a>

EDIT COMPANIONS: GORDON JONES (OTHER OF SARAH SMITH)

RELATIONSHIP TO CLIENT\*

Other

TITLE FIRST NAME\* MIDDLE NAME LAST NAME\* GENDER\*

Mr. Gordon Jones M | F

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