



Quick Guide –
Client Marketing
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

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

Status	Advisor	Client	Quote Name	Depart	Services	Updated	
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	31.05.22		04.05.22	View
ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	11.05.22		02.05.22	View
TRAVEL-READY	AK	Sam Smith	Seattle Airport Marriott	19.05.22		02.05.22	View
PART BOOKED	AK	Sam Smith	Round Trip Flights: Los Angeles ...	12.06.22		26.04.22	View
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	7X6E3	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 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 'Bookings' and a search icon. To the right, the user's name 'Anna Kulej' is displayed. Below the navigation, the client's name 'Miss Sarah Smith' is shown along with her birth date '4 May 1981, Female' and contact information '416-444-4343 | 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. Below this, a sidebar on the left lists menu items: Client Information, Companions, Additional Details and Preferences, Loyalty Programs, Marketing Fields (highlighted), and Notes. The main content area is titled 'Marketing Fields' and includes an 'Opt-out' link and an 'Edit' icon. A descriptive text states: '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'.' Below this, a table lists marketing fields with their values and edit links.

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

1.3.1 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.

5. Cancel Save

	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>

1.3.2 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 top navigation bar includes 'Partners', 'Clients', and 'Resources'. The client's name and contact information are displayed at the top. Below this are several tool icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A sidebar on the left contains a list of sections: Client Information, Companions, Additional Details and Preferences, Loyalty Programs, Marketing Fields (highlighted), and Notes. The main content area shows 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 the Marketing Fields section.

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>

1.3.3 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.

[Cancel](#) [Confirm](#)