



Client Documents  
June 2022

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# 1. Client Documents

ADX has **six (6)** types of client documents that can be sent directly through the system or downloaded:

- Client Itinerary
- Service comparisons (hotel, air)
- Payment Invoice
- Client Statement
- Fee agreement
- Additional emails – Bon Voyage, Welcome Home, Birthday Greeting, Passport Renewals

ADX does not automatically send any communication to clients, this is an advisor driven action. Anything sent out of the ADX system will automatically CC the primary advisor on file. Any client document sent out of the ADX system will also be captured on the trip page as well as the client profile. All emails sent out of the ADX system will come from [noreply@traveledge.com](mailto:noreply@traveledge.com)<sup>1</sup> unless advisor has a Travel Edge email in their profile.

**TRAVELEDGE CORP.** TRIP REF 51M4W4

CLIENT STATEMENT

FOR CLIENT: Cara Jones  
123 Sunny Drive, Brooklyn  
NY 20676, United States

TRAVEL CONSULTANT: Anna Kulej  
Office: 1-800-387-2977

2786 MILWAUKEE RD. Beloit  
Alabama 53511, United States  
TravelEdge Dev Office -TIC04 50023253 Test

PRINTED: 09 May 2022

SERV FEE - CONSULTATION FEE			
BASE	TAXES	TOTAL	
USD \$150.00	USD \$0.00	USD \$150.00	
Invoice Amount: USD \$150.00 Invoice No: 29029791, Issued: 05 Oct 2021 Paid in Full			

SERV FEE INFORMATION CONFIRMATION: PF5162723  
Vendor: TravelEdge

HOTEL - RESIDENCE INN LA JOLLA MARRIOTT, LA JOLLA			
TRAVELERS	BASE	TAXES	TOTAL
Jones/Cara	USD \$630.77	USD \$0.00	USD \$630.77
Invoice Amount: USD \$630.77 Invoice No: 29029790, Issued: 05 Oct 2021 Paid in Full			

HOTEL INFORMATION CONFIRMATION: 256-6672257  
Vendor: Travel Edge - Hotels Property: RESIDENCE INN LA JOLLA MARRIOTT Start: 13 Apr 22 End: 17 Apr 22  
Check In: 12:00 AM Check Out: 12:00 AM Duration: 4 days Smoking: N/A

Payment Summary	
Consultation Fee	USD \$150.00
Total Hotel	USD \$630.77
<b>Invoice Total</b>	<b>USD \$786.77</b>
Paid on 05 Oct 2021 - Merchant XXXXXXXXXXXXX1881	USD \$786.77
<b>Amount Paid</b>	<b>USD \$786.77</b>

**TRAVELEDGE CORP.** TRIP REF 51M4W4

INVOICE NO. 29029790

FOR CLIENT: Cara Jones  
123 Sunny Drive, Brooklyn  
NY 20678, United States

TRAVEL CONSULTANT: Anna Kulej  
Office: 1-800-387-2977

2786 MILWAUKEE RD. Beloit  
Alabama 53511, United States  
TravelEdge Dev Office -TIC04 50023253 Test

ISSUED: 05 Oct 2021  
PRINTED: 09 May 2022

HOTEL : RESIDENCE INN LA JOLLA MARRIOTT, LA JOLLA			
TRAVELERS	BASE	TAXES	TOTAL
Jones/Cara	USD \$630.77	USD \$0.00	USD \$630.77

HOTEL INFORMATION CONFIRMATION: 256-6672257  
Vendor: Travel Edge - Hotels Property: RESIDENCE INN LA JOLLA MARRIOTT Start: 13 Apr 22 End: 17 Apr 22  
Check In: 12:00 AM Check Out: 12:00 AM Duration: 4 days Smoking: N/A

Payment Summary	
Total Hotel	USD \$630.77
<b>Invoice Total</b>	<b>USD \$630.77</b>
Paid on 05 Oct 2021 - Merchant XXXXXXXXXXXXX1881	USD \$630.77
<b>Amount Paid</b>	<b>USD \$630.77</b>

<sup>1</sup> Affiliate agencies email will go out from [noreply@adxtravel.com](mailto:noreply@adxtravel.com)

## 1.1. TYPES OF CLIENT DOCUMENTS

ADX will generate six (6) different types of client facing documents that you can offer to your clients.

### 1.1.1 Client Itinerary

The client itinerary is the main document issued by advisor to the client directly that contains all the service details and final confirmation numbers. The itinerary can be customized on the Advisor Profile, the Trip Services Page, and the Client Itinerary page directly. A few things to remember:

- The itinerary can be fully customized before sending including branding and advisor profile information
- The itinerary is meant to be used as a final document for confirmation numbers

The screenshot displays the ADX interface for managing a client itinerary. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources', along with a search bar and a user profile for 'Anna Kulej'. The main heading is 'Round Trip Flights: New York - Miami' with the dates 'Thursday, May 26, 2022 - Monday, May 30, 2022'. Below this, there are buttons for 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Client & Travelers' section shows the trip name and dates. The 'All Services' section lists two services: 'Round-Trip New York to Miami' and 'Esa Miami Brickell Port'. At the bottom, there are two green boxes: 'Estimated Quote' showing 'USD \$39.00' and 'Potential Commission' showing 'USD \$11.00', and 'Client Documents' showing 'Insurance offered'. A red box highlights the 'Send Itinerary' button at the bottom right, and a red arrow points from the 'Client Documents' section to it.

**TE**

# Round Trip Flights: New York - Miami

Thursday May 26, 2022 - Monday May 30, 2022

**Travelers:**  
Mrs. Cara Jones

**Prepared by:**  
Anna Kulej  
TravelEdge Corp  
anna.kulej@traveledge.com  
1-800-367-2977

## Round Trip Flights: New York - Miami

Itinerary Status **QUOTE**

**Thursday, May 26, 2022 - Monday, May 30, 2022**

For Mrs. Cara Jones

DATE	TIME		EVENT	DESCRIPTION
<b>MAY</b> 26	07:00 AM 10:05 AM		<b>Departure:</b> New York (JFK) , Terminal 4 <b>Arrival:</b> Miami (MIA)	DELTA AIR LINES (DL) 2219,
			<b>Check-in:</b> Esa Miami Brickell Port	<b>Address:</b> 298 SW 15TH STREET Miami Florida 33129 United States
<b>MAY</b> 27			<b>Stay:</b> Esa Miami Brickell Port	<b>Address:</b> 298 SW 15TH STREET Miami Florida 33129 United States
<b>MAY</b> 28			<b>Stay:</b> Esa Miami Brickell Port	<b>Address:</b> 298 SW 15TH STREET Miami Florida 33129 United States
<b>MAY</b> 29			<b>Stay:</b> Esa Miami Brickell Port	<b>Address:</b> 298 SW 15TH STREET Miami Florida 33129 United States
<b>MAY</b> 30	07:50 AM 10:47 AM		<b>Departure:</b> Miami (MIA) <b>Arrival:</b> New York (JFK) , Terminal 4	DELTA AIR LINES (DL) 2767,
			<b>Check-out:</b> Esa Miami Brickell Port	<b>Address:</b> 298 SW 15TH STREET Miami Florida 33129 United States



### INSURANCE

Speak to your advisor about the benefits of purchasing travel insurance today

### Notes

Please feel free to reach out to me any time during your trip at 555-123-4567 for any issues you may encounter as I want to ensure you have the best trip possible.

Thursday,  
May 26,  
2022

### Round-Trip New York to Miami

Traveler:  
Mrs. Cara Jones

#### // DELTA AIR LINES Flight 2219

JFK	MIA	Duration	
New York	Miami	3h 5m	
07:00 AM	10:05 AM		
May 26	May 26		
Terminal 4			

Cabin: , Class: W	Passenger Name
Aircraft: BOEING 737-800	Cara Jones
Brand: DELTA COMFORT PLUS	
Baggage allowance: 0 Piece/Passenger	

#### Frequent Flyer Numbers

Mrs. Cara Jones DELTA AIRLINES: 44443333

[See Full Fare Rules & Restrictions \(http://te-clients.ual.td/tid/air-fare-rules/5166014\)](http://te-clients.ual.td/tid/air-fare-rules/5166014)

Note: This Air Itinerary has been sent as a quote for information purposes only. Pricing and availability are not guaranteed until booked and ticketed.

### Esa Miami Brickell Port

298 SW 15TH STREET  
Miami, Florida, 33129,  
United States  
Phone: 305856-3700

#### // Studio Queen Bed Non Smoking

Check-in	Stay
May 26, 2022	4 Nights

#### Amenities

High Speed Internet	Extended Stay Available	Wheelchair Accessible
Local Calls	Parking	Meal Plan
Pets Allowed	Laundry Facilities	

#### Overview

At Extended Stay America, guests find a friendly home away from home, whether for a day, a week or a month. Each of our 107 spacious suites offers a fully equipped kitchen, free WiFi, and a flat screen TV with premium channels, with free grab and go breakfast and laundry facilities onsite. Only 1 mile from Downtown Miami, close to restaurants, and just 2 miles from the Port Of Miami, our hotel is the convenient, affordable choice for savvy business and leisure travelers. Hotel requires a valid credit card on file upon check in for incidental charges or damages to guest rooms. If no valid credit card or guest is paying cash, a cash room deposit in the amount of 100USD per stay per room is collected. After satisfactory inspection at check out, room deposit will be refunded. Refunds over 100USD will be refunded by check within 14 days of departure. Visit [esa.com/extendedperks](http://esa.com/extendedperks) to join the Extended Perks rewards program. It is free to join and includes exclusive offers from Extended Stay America and hundreds of your favorite brands, no points required!

#### Rate Description

### Pricing

Item	Cost	Taxes and Fees	Total Cost
Round-Trip New York to Miami	\$482.80 USD	\$65.41 USD	\$548.21 USD
Esa Miami Brickell Port	\$1,018.70 USD	\$0.00 USD	\$1,018.70 USD
<b>Total</b>	<b>\$1,501.50 USD</b>	<b>\$65.41 USD</b>	<b>\$1,566.91 USD</b>

### Terms & Conditions

The travel-related products, services, fares and other information (the "Travel Offerings") set forth in this Itinerary, Quote, and/or Invoice, As applicable (Each hereafter referred to as a "Travel Record") are provided by the suppliers of such products and services which may include, without limitation, airlines, cruise line operators, travel insurers, hotels, and local ground operators (in each case a "Supplier" and collectively the "Suppliers").

Passports must be valid at least six months beyond the date of travel. Ensure that you have all documentation required for travel outside of North America. Entry into a country may be refused even if the required information and travel documents are complete.

Living standards and practices at the destination and the standards and conditions there with respect to the provision and utilities, services and accommodation may differ from those found in North America.

No prices increases are permitted after the customer has paid in full. If a price increase is more than 7% (except increases resulting from an increase in GST/PST/HST), the customer has the right to cancel the contract and obtain a full refund.

Additional airline baggage fees may apply. Changes to itinerary may result in airline penalties and fees.

Air Service Prices are subject to change until ticketed and full amount is paid.

Suppliers may charge a fee for any cancellation or modification to your booked Travel Offering. Most travel bookings are non-refundable and cancelled bookings will incur charges. These charges can be up to 100% of the cost of the booking, whether or not your travel has commenced. Please refer to the supplier's terms and conditions for more information.

This Travel record is subject to Terms & Conditions. [Click here to review the Terms & Conditions \(http://www.adxtravel.com/legal\)](http://www.adxtravel.com/legal). Please read and ensure you understand these Terms & Conditions when considering the Travel Offerings. By completing this booking for the Travel Offerings, you agree to the Terms & Conditions.

Each Travel Offering is subject to additional terms and conditions imposed by the applicable Supplier of such Travel Offering, which may vary from the Terms & Conditions.

IT IS YOUR RESPONSIBILITY TO READ AND UNDERSTAND THE SUPPLIER'S TERMS AND CONDITIONS RESPECTING ANY TRAVEL OFFERING. BY COMPLETING THIS BOOKING FOR THE TRAVEL OFFERINGS, YOU ALSO AGREE TO THE SUPPLIER'S TERMS AND CONDITIONS.

In the case of California, registration as a seller of travel does not constitute approval by the State of California.

### Pricing

Item	Cost	Taxes and Fees	Total Cost
Round-Trip New York to Miami	\$482.80 USD	\$65.41 USD	\$548.21 USD
Esa Miami Brickell Port	\$1,018.70 USD	\$0.00 USD	\$1,018.70 USD
<b>Total</b>	<b>\$1,501.50 USD</b>	<b>\$65.41 USD</b>	<b>\$1,566.91 USD</b>

\*Travel Edge Network, a division of Travel Edge (USA) Inc. and Travel Edge (Canada) Inc. \*

## 1.1.2 Service Comparisons

Service comparison documents can be created using the Air, Hotel and Activities modules, to show clients up to four (4) different options on one document. This document is formatted to show a cross section of pricing, class category, and other details of the service. A few things to remember:

- Document type is ONLY available for air, hotel, and activities services
- You need to have at least 2 of the same service type on the reference for the Compare Services button to appear

The screenshot displays the ADX system interface for a flight service comparison. The main content area shows a 'One Way Flight: Los Angeles to New York' for Wednesday, June 22, 2022. Below the flight details, there are four service options listed, each with a 'Book' button. At the bottom, a dark bar contains buttons for 'Add ADX Service -', 'Add non-ADX Service -', 'Compare Services -', and 'Send Itinerary'. A blue box highlights the 'Compare Services -' button, and a blue arrow points from the 'Compare Services -' button to the 'Compare Services -' button.

### 1.1.3 Payment Invoice

Once a payment has been processed on a service, an invoice number will populate under the PAYMENT tab Invoices section. The invoice number is a hyperlink meaning you can send or download the invoice for your client. A few things to remember:

- Invoices will ONLY show for services deemed as confirmed/paid by the vendor
- For hotels, invoices are used for commission tracking purposes ONLY and can differ from what the client pays at check out
- Invoice number can take up to 24 hours to show as synched in ADX and the finance system
- A PENDING invoice has not synched into ADX yet
- An invoice number without the hyperlink is not yet available in the finance system
- Anything over 24 hours reach out to ADX support for assistance in syncing

The screenshot displays the ADX system interface for a booking titled "Spring Break on the West Coast" (Monday, April 11, 2022 - Sunday, April 17, 2022). The booking is managed by Anna Kulej. The interface includes tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. A "COST SUMMARY" table is visible, showing details for Round Trip Flights, San Diego Marriott La Jolla, and a Consultation Fee. Below this is a "PAYMENT SUMMARY" section indicating no payments are present. The "INVOICES" section is highlighted with a red box and contains a table with two entries: a sale for USD 5630.77 and a refund for USD -630.77, both issued on Oct 5, 2021, for Residence Inn La Joll Marriott, La Jolla. A "GENERATE CLIENT STATEMENT" button is also present.

Travel Service	Est. Commission	Taxes	Cost	
Round Trip Flights	USD 5386.79	USD 5461.84	USD 54,614.44	PAID
San Diego Marriott La Jolla		USD 5118.50	USD 51,050.50	
Consultation Fee		USD 50.00	USD 5150.00	PAID
<b>Total</b>	<b>USD 5536.79</b>	<b>USD 5580.34</b>	<b>USD 55,814.94</b>	

Number	Type	Issued	Service	Payment Method	Amount
29029790*	Sale	Oct 5, 2021	Residence Inn La Joll Marriott, La Jolla	XXXXXXXXXXXX1881 CreditCard	USD 5630.77
29029790*	Refund	Oct 5, 2021	Residence Inn La Joll Marriott, La Jolla	XXXXXXXXXXXX1881 CreditCard	USD -630.77



TRIP REF 51M4W4

INVOICE NO. 29029790

TRAVELEDGE CORP.

**FOR CLIENT:** Cara Jones  
123 Sunny Drive, Brooklyn  
NY 20678, United States

**TRAVEL CONSULTANT:** Anna Kulej  
Office: 1-800-387-2977

**ISSUED:** 05 Oct 2021  
**PRINTED:** 09 May 2022

2786 MILWAUKEE RD, Beloit  
Alabama 53511, United States  
TravelEdge Dev Office -TICO# 50023253 Test

**HOTEL : RESIDENCE INN LA JOLLA MARRIOTT, LA JOLLA**

TRAVELERS	BASE	TAXES	TOTAL
Jones/Cara	USD \$630.77	USD \$0.00	USD \$630.77

HOTEL INFORMATION		CONFIRMATION: 256-6672257	
<b>Vendor:</b> Travel Edge - Hotels	<b>Property:</b> RESIDENCE INN LA JOLLA MARRIOTT	<b>Start:</b> 13 Apr 22	<b>End:</b> 17 Apr 22
<b>Check In:</b> 12:00 AM	<b>Check Out:</b> 12:00 AM	<b>Duration:</b> 4 days	<b>Smoking:</b> N/A

Payment Summary	
Total Hotel	USD \$630.77
<b>Invoice Total</b>	<b>USD \$630.77</b>
<b>Paid on 05 Oct 2021</b> - Merchant XXXXXXXXXXXX1881	USD \$630.77
<b>Amount Paid Paid in Full</b>	<b>USD \$630.77</b>

### Legal

THE TRAVEL-RELATED PRODUCTS, SERVICES, FARES AND OTHER INFORMATION (THE "TRAVEL OFFERINGS") SET FORTH IN THIS ITINERARY, QUOTE, AND/OR INVOICE, AS APPLICABLE (EACH HEREAFTER REFERRED TO AS A "TRAVEL RECORD") ARE PROVIDED BY THE SUPPLIERS OF SUCH PRODUCTS AND SERVICES WHICH MAY INCLUDE, WITHOUT LIMITATION, AIRLINES, CRUISE LINE OPERATORS, TRAVEL INSURERS, HOTELS, AND LOCAL GROUND OPERATORS (IN EACH CASE A "SUPPLIER" AND COLLECTIVELY THE "SUPPLIERS").

PASSPORTS MUST BE VALID AT LEAST SIX MONTHS BEYOND THE DATE OF TRAVEL. ENSURE THAT YOU HAVE ALL DOCUMENTATION REQUIRED FOR TRAVEL OUTSIDE OF NORTH AMERICA. ENTRY INTO A COUNTRY MAY BE REFUSED EVEN IF THE REQUIRED INFORMATION AND TRAVEL DOCUMENTS ARE COMPLETE.

LIVING STANDARDS AND PRACTICES AT THE DESTINATION AND THE STANDARDS AND CONDITIONS THERE WITH RESPECT TO THE PROVISION AND UTILITIES, SERVICES AND ACCOMMODATION MAY DIFFER FROM THOSE FOUND IN NORTH AMERICA.

NO PRICES INCREASES ARE PERMITTED AFTER THE CUSTOMER HAS PAID IN FULL. IF A PRICE INCREASE IS MORE THAN 7% (EXCEPT INCREASES RESULTING FROM AN INCREASE IN GST/PST/HST), THE CUSTOMER HAS THE RIGHT TO CANCEL THE CONTRACT AND OBTAIN A FULL REFUND.

SUPPLIERS MAY CHARGE A FEE FOR ANY CANCELLATION OR MODIFICATION TO YOUR BOOKED TRAVEL OFFERING. MOST TRAVEL BOOKINGS ARE NON-REFUNDABLE AND CANCELLED BOOKINGS WILL INCUR CHARGES. THESE CHARGES CAN BE UP TO 100% OF THE COST OF THE BOOKING, WHETHER OR NOT YOUR TRAVEL HAS COMMENCED. PLEASE REFER TO THE SUPPLIER'S TERMS AND CONDITIONS FOR MORE INFORMATION.

### 1.1.4 Client Statement

A client statement will be available on any ADX service that has a synched payment invoice. The statement will reflect all invoices for all services on one reference as well as amounts owing. The client statement will appear under the PAYMENT tab Invoices section. A few things to remember:

- Client statement button will ONLY appear when there is a synched invoice on the reference
- Client statement will compile ALL service invoices on to one document

The screenshot displays the ADX client portal interface for a booking titled "Spring Break on the West Coast" (Monday, April 11, 2022 - Sunday, April 17, 2022). The booking is managed by Cara Jones, Advisor: Anna Kulej. The "Payment" tab is selected, showing a "COST SUMMARY" table with columns for Travel Service, Est. Commission, Taxes, and Cost. The total cost is USD 55,814.94. Below the cost summary is a "PAYMENT SUMMARY" section with the message "No payments present at this time." The "INVOICES" section is highlighted with a blue box and contains a "GENERATE CLIENT STATEMENT" button. The invoices table lists two entries: a sale for USD 630.77 and a refund for USD -630.77, both issued on Oct 5, 2021, for Residence Inn La Joll Marriott, La Jolla.

Number	Type	Issued	Service	Payment Method	Amount
29029790*	Sale	Oct 5, 2021	Residence Inn La Joll Marriott, La Jolla	XXXXXXXXXXXX1881 CreditCard	USD 630.77
29029790*	Refund	Oct 5, 2021	Residence Inn La Joll Marriott, La Jolla	XXXXXXXXXXXX1881 CreditCard	USD -630.77



CLIENT STATEMENT

TRAVELEDGE CORP.

FOR CLIENT: Cara Jones  
123 Sunny Drive, Brooklyn  
NY 20678, United States

TRAVEL CONSULTANT: Anna Kulej  
Office: 1-800-387-2977

PRINTED: 09 May 2022

2786 MILWAUKEE RD, Beloit  
Alabama 53511, United States  
TravelEdge Dev Office -TICO# 50023253 Test

SERV FEE : CONSULTATION FEE			
	BASE	TAXES	TOTAL
	USD \$150.00	USD \$0.00	USD \$150.00
			<b>Invoice Amount: USD \$150.00</b>
			<i>Invoice No: 29029791, Issued: 05 Oct 2021</i>
			<i>Paid in Full</i>

SERV FEE INFORMATION

CONFIRMATION: PF5162723

Vendor: TravelEdge

HOTEL : RESIDENCE INN LA JOLL MARRIOTT, LA JOLLA			
TRAVELERS	BASE	TAXES	TOTAL
Jones/Cara	USD \$630.77	USD \$0.00	USD \$630.77
			<b>Invoice Amount: USD \$630.77</b>
			<i>Invoice No: 29029790, Issued: 05 Oct 2021</i>
			<i>Paid in Full</i>
			<b>Invoice Amount: USD \$-630.77</b>
			<i>Invoice No: 29029790, Issued: 05 Oct 2021</i>
			<i>Refund Issued</i>

HOTEL INFORMATION

CONFIRMATION: 256-6672257

Vendor: Travel Edge - Hotels	Property: RESIDENCE INN LA JOLL MARRIOTT	Start: 13 Apr 22	End: 17 Apr 22
Check In: 12:00 AM	Check Out: 12:00 AM	Duration: 4 days	Smoking: N/A

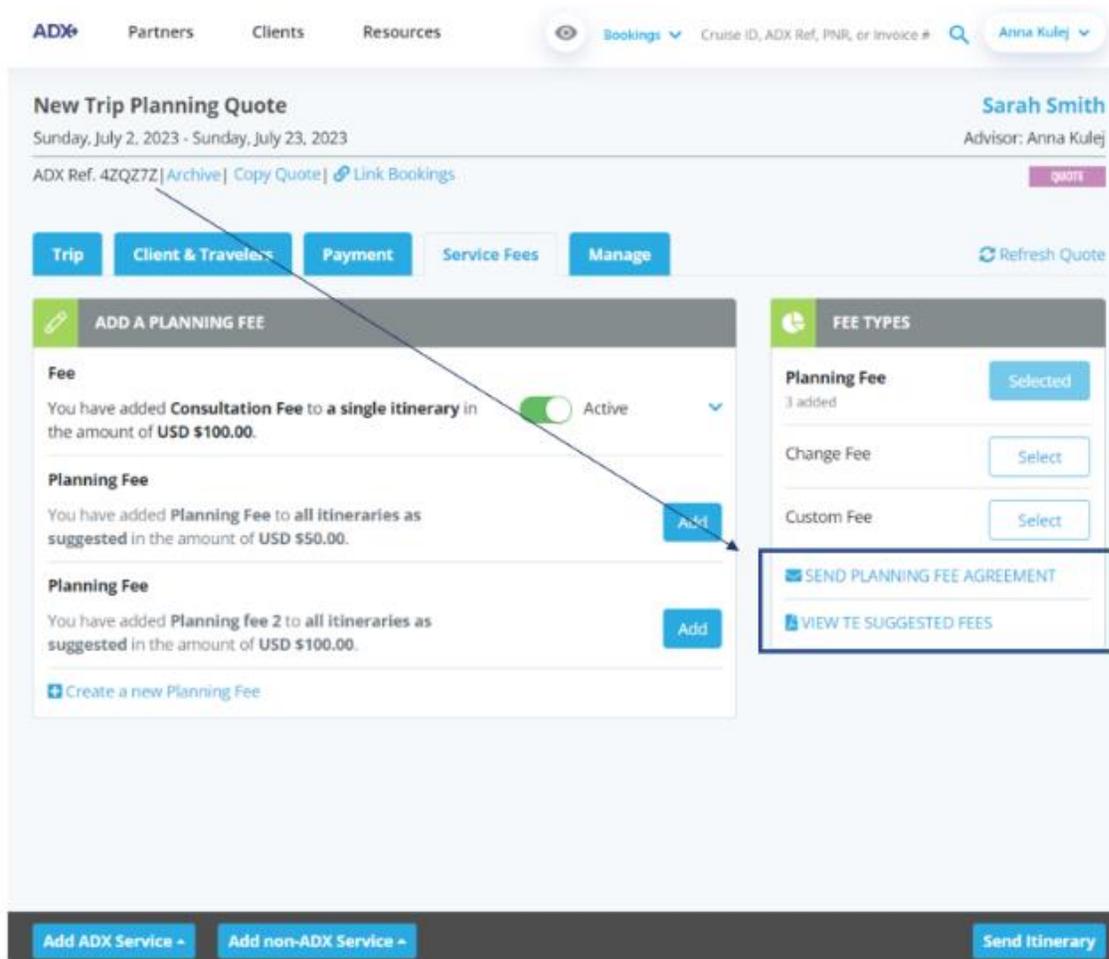
Payment Summary	
Consultation Fee	USD \$150.00
Total Hotel	USD \$0.00
<b>Invoice Total</b>	<b>USD \$150.00</b>
Paid on 05 Oct 2021 - Merchant:XXXXXXXXXXXX1881	USD \$150.00
<b>Amount Paid</b>	<b>USD \$150.00</b>

Legal

### 1.1.5 Fee Agreement

A planning fee agreement is generated when creating a planning fee through the Invoice tool automatically creates a client fee agreement that can be printed, downloaded, or emailed to your client. A few things to remember:

- The fee agreement ONLY creates when using the Planning Fee flow through the invoice tool
- Fee agreement will appear under the SERVICE FEES tab
- The fee agreement is not mandatory
- Refer to the Invoice Tool Guide for more information on this functionality





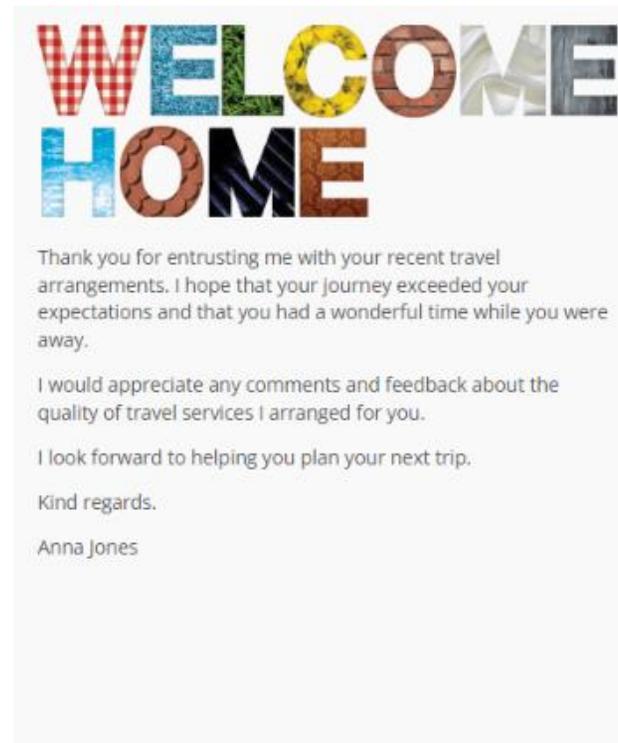
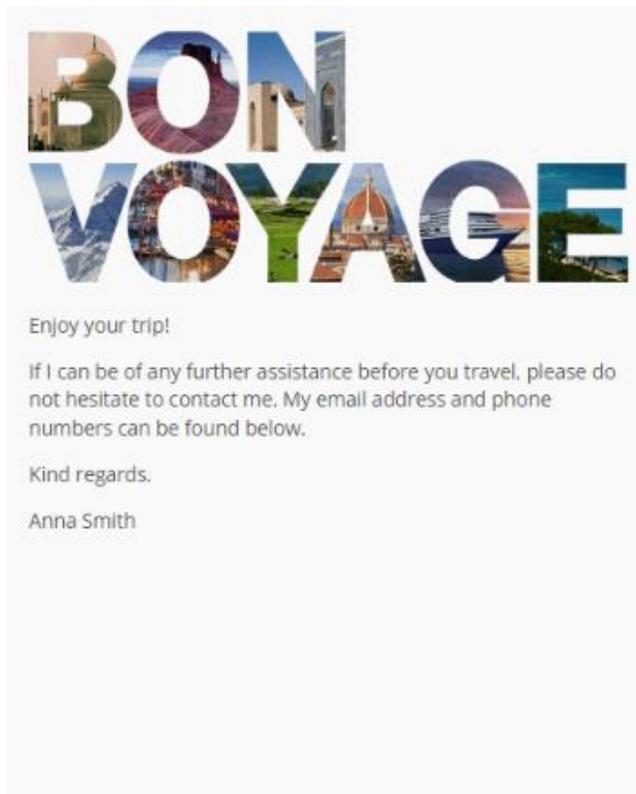
## 1.1.6 Additional Emails

Advisors can also opt into ADX sending clients additional emails such as:

- *Bon Voyage* – 1 day before trip start date
- *Welcome Home* – 1 day after trip end date
- *Birthday Greetings* – On date of birth indicated on client profile
- *Passport Reminders* – 90 days before expiration entered on client profile

Additional emails can all be opted in or out of and defaults can be customized on the advisor profile. A few things to remember:

- Additional emails are OPTIONAL and do not automatically send to your clients
- These documents cannot be downloaded to send, they auto send from [noreply@traveledge.com](mailto:noreply@traveledge.com) to your client
- Customize the Bon Voyage/Welcome Home email formatting on your client profile OR/AND the trip services page
- Opt into the Birthday Greeting and Passport Reminder emails on the client profile



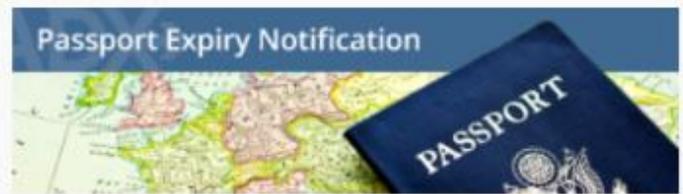


Hello,

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,

Anna Smith



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,

Anna Smith

## 1.2.CLIENT ITINERARY

The client itinerary is the main client facing document that can be emailed and/or downloaded as a final travel document. The itinerary will contain all the travel details, confirmation numbers and advisor contact information. The itinerary can be customized for content, branding and length from three different areas in the system:

- Default Customizations - Advisor Profile: Set defaults for logos, branding, notes, messaging
- Trip Specific Customizations – Trip Services Page: Add specific trip details, names, images
- Itinerary Documents Customizations – Add/remove sections



## 1.2.1 Itinerary Review

The itinerary is broken down into sections that can be customized for content, branding and length.

Logo uploaded from Advisor Profile

Brand default from Advisor Profile

Cover Image from Trip Services page

Trip name from Trip Services page

Monday June 20, 2022 – Tuesday June 21, 2022

Traveler details on Trip Page

Advisor info from Advisor Profile

**Travelers:**  
Ms. Greta Jones

**Prepared by:**  
Anna Kulej  
Anna's Travel  
Anna.Kulej@traveledge.com  
855-444-5666

Itinerary Status – Quote, In Progress, Travel Ready

Executive Summary of services on the itinerary

24/7 VIP support information

Insurance status

Trip Description from Trip Services page

Default notes added on itinerary page

Advisor image from Advisor Profile page

Advisor background from Public Profile

Advisor Contact from Profile

**Jones New York Business Trip** Itinerary Status **QUOTE**

**Monday, June 20, 2022 – Tuesday, June 21, 2022**

For Ms. Greta Jones

DATE	TIME		EVENT	DESCRIPTION
JUN 20	05:04 PM		<b>Departure:</b> Los Angeles (LAX) , Terminal 0 <b>Via:</b> Las Vegas	AMERICAN AIRLINES (AA) 735, Economy
			<b>Check-in:</b> St Regis New York	<b>Address:</b> TWO 5TH AVENUE AT 65TH STREET New York 10022 United States
JUN 21	07:00 AM		<b>Arrival:</b> New York (JFK) , Terminal B	
			<b>Check-out:</b> St Regis New York	<b>Address:</b> TWO 5TH AVENUE AT 65TH STREET New York 10022 United States

**INSURANCE**

Speak to your advisor about the benefits of purchasing travel insurance today

**VIP SUPPORT**

24/7 Access  
**Toll-Free (North America):** 1 (800) 481-2064  
**Global:** 1-(847) 288-3069

**Notes**

**Trip Description**  
Air fare and hotel details provided

**Important Information**  
I found the following itineraries for you. Let me know what you think!

---



Hello Greta,

What started out as a keen desire to plan and organize, turned into a live long career of creating beautifully crafted memories for my friends, family and clients.

Sincerely,  
*Anna Kulej*

Anna's Travel  
 Anna.Kulej@worldviewtravel.com  
 555-444-5666

Monday,  
June 20,  
2022

Service details ordered by  
calendar view on Trip Services  
page

**One-way Los Angeles to New York**

**Traveler:**  
Ms. Greta Jones

**AMERICAN AIRLINES Flight 739**

LAX	LAS	Duration	American Airlines
Los Angeles	Las Vegas	5h 14m	
06:24 PM	06:38 PM		
Jun 20	Jun 20		
Terminal 0	Terminal 1		

<b>Cabin:</b> Economy, Class G	<b>Passenger Name:</b> Greta Jones
<b>Aircraft:</b> AIRBUS A321XLR/200	
<b>Brand:</b> MAIN CABIN	
<b>Baggage allowance:</b> 0 Piece/Passenger	

**4h 15m Layover in Las Vegas**

AA-NONREFUNDABLE BY FLT TIME OR NOVALLEPRIVATE FARE APPLIED - CHECK RULES FOR CORRECT TICKET/INVALIDATING CARRIER - AACORP ID/ACONT CODE USED: EDG01

See Full Fare Rules & Restrictions @ <https://www.aa.com/airfare-rules/2014220>

**Note:** This Air Itinerary has been sent as a quote for information purposes only. Pricing and availability are not guaranteed until booked and ticketed.

**AMERICAN AIRLINES Flight 335**

LAS	JFK	Duration	American Airlines
Las Vegas	New York	5h 4m	
10:58 PM	01:00 AM		
Jun 20	Jun 21		
Terminal 1	Terminal 8		

<b>Cabin:</b> Economy, Class G	<b>Passenger Name:</b> Greta Jones
<b>Aircraft:</b> BOEING 737-800	
<b>Brand:</b> MAIN CABIN	
<b>Baggage allowance:</b> 0 Piece/Passenger	

AA-NONREFUNDABLE BY FLT TIME OR NOVALLEPRIVATE FARE APPLIED - CHECK RULES FOR CORRECT TICKET/INVALIDATING CARRIER - AACORP ID/ACONT CODE USED: EDG01

See Full Fare Rules & Restrictions @ <https://www.aa.com/airfare-rules/2014220>

**Note:** This Air Itinerary has been sent as a quote for information purposes only. Pricing and availability are not guaranteed until booked and ticketed.

Pricing breakout by service

**Pricing**

Item	Cost	Taxes and Fees	Total Cost
Round Trip Los Angeles to Paris	\$1,000.00 USD	\$1,028.24 USD	\$1,928.24 USD
Hotels/Meals/Paris La Stron	\$100.00 USD	\$0.00 USD	\$100.00 USD
Deluxe Travel Protection Plan	\$110.00 USD	\$0.00 USD	\$110.00 USD
Packing Fee	\$100.00 USD	\$0.00 USD	\$100.00 USD
<b>Total</b>	<b>\$1,310.00 USD</b>	<b>\$1,028.24 USD</b>	<b>\$2,338.24 USD</b>

Terms and Conditions

**Terms & Conditions**

The travel-related products, services, fares and other information (the "Travel Offerings") set forth in this Itinerary, Quote, and/or Invoice, as applicable (Each hereafter referred to as a "Travel Record") are provided by the suppliers of such products and services which may include, without limitation, airlines, cruise line operators, travel insurers, hotels, and local ground operators (in each case a "Supplier" and collectively the "Suppliers").

Passports must be valid at least six months beyond the date of travel. Ensure that you have all documentation required for travel outside of North America. Entry into a country may be refused even if the required information and travel documents are complete.

Living standards and practices at the destination and the standards and conditions there with respect to the provision and utilities, services and accommodation may differ from those found in North America.

No price increases are permitted after the customer has paid in full. If a price increase is more than 7% (except increases resulting from an increase in GST/PST/HST), the customer has the right to cancel the contract and obtain a full refund.

Additional airline baggage fees may apply. Changes to itinerary may result in airline penalties and fees.

Air Service Prices are valid until 12-30-2021.

Suppliers may charge a fee for any cancellation or modification to your booked Travel Offering. Most travel bookings are non-refundable and cancelled bookings will incur charges. These charges can be up to 100% of the cost of the booking, whether or not your travel has commenced. Please refer to the supplier's terms and conditions for more information.

This Travel record is subject to Terms & Conditions. [Click here to review the Terms & Conditions](http://www.adtravel.com/legal) (http://www.adtravel.com/legal). Please read and ensure you understand these Terms & Conditions when considering the Travel Offerings. By completing this booking for the Travel Offerings, you agree to the Terms & Conditions.

Each Travel Offering is subject to additional terms and conditions imposed by the applicable Supplier of such Travel Offering, which may vary from the Terms & Conditions.

IT IS YOUR RESPONSIBILITY TO READ AND UNDERSTAND THE SUPPLIER'S TERMS AND CONDITIONS RESPECTING ANY TRAVEL OFFERING. BY COMPLETING THIS BOOKING FOR THE TRAVEL OFFERINGS, YOU ALSO AGREE TO THE SUPPLIER'S TERMS AND CONDITIONS.

In the case of California, registration as a seller of travel does not constitute approval by the State of California.

Terms and Conditions pricing

**Pricing**

Item	Cost	Taxes and Fees	Total Cost
One-way Los Angeles to New York	\$349.64 USD	\$55.42 USD	\$405.06 USD
St Regis New York	\$1,245.00 USD	\$244.52 USD	\$1,489.52 USD

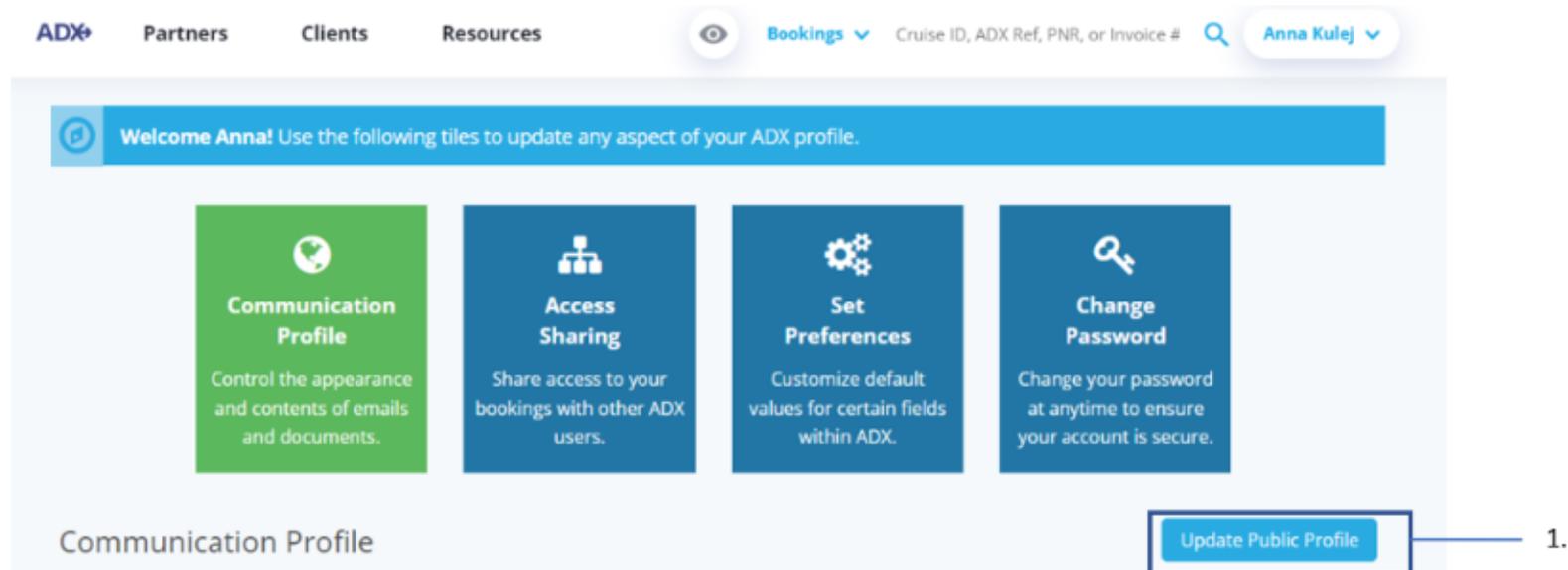
## 1.2.2 Default Customization – Advisor Profile

Set defaults for messaging, logos and branding details. These defaults are set up once and available every time you use the documents. The defaults are set from the advisor profile page.

The screenshot shows the ADX user interface. At the top, there is a navigation bar with 'ADX' logo, 'Partners', 'Clients', 'Resources', 'Bookings' dropdown, a search bar with 'Cruise ID, ADX Ref, PNR, or Invoice #' and a search icon, and a user profile 'Anna Kulej' dropdown. Below the navigation bar is a blue banner with a welcome message: 'Welcome Anna! Use the following tiles to update any aspect of your ADX profile.' Below the banner are four blue tiles: 'Communication Profile' (with a globe icon), 'Access Sharing' (with a group icon), 'Set Preferences' (with a gear icon), and 'Change Password' (with a key icon). Each tile has a brief description of its function. Below the tiles is the 'Communication Profile' section, which includes an 'Update Public Profile' button and a list of settings to be updated, each in a grey bar with a dropdown arrow: 'Specify Your Address and Upload Your Portrait', 'Brand Settings', 'Upload Your Logos', 'Define Standard Notes for Inclusion in Client Itineraries', 'Define Standard Service Descriptions for Planning Fee Agreements', 'Customize Body Text of Itinerary Emails', 'Define Your Email Signature Block', 'Customize Body Text of Bon Voyage and Welcome Home Emails', and 'Set Advisor Loyalty Number for Hotels'.

1.2.2.1 ADVISOR BIOGRAPHY - PUBLIC PROFILE

Create an advisor profile showcasing who you are, your expertise, awards and reviews and be searchable on the Travel Edge website, [advisor page](#). Once you fill in the details make sure you make your profile active. Updates to the profile may take up to 24 hours to appear on the website. The information from the bio description will automatically populate on to the itinerary.



 <b>Steps</b>	 <b>Notes</b>	
1.	Click Update Public Profile	<ul style="list-style-type: none"> <li>• <i>Located on the right side</i></li> </ul>

ADP Partners Clients Resources Settings Create & Add New PSL or Invoice & Anna Kulej

1. Use this page to update your public profile, displayed on the Travel Edge website.  
Please note that the Travel Edge website is updated daily so changes may take up to 24 hours to appear.  
 SHOW MY PROFILE ON TRAVEL EDGE WEBSITE

2. 

3. **UPDATE IMAGE**  
Choose File No file chosen  
Image should be square and at least 300x300 px in size.  
IMAGE SIZES

4. **BIOGRAPHY HEADLINE**  
**BIOGRAPHY**  
What started out as a keen desire to plan and organize, turned into a five long career of creating beautifully crafted memories for my friends, family and clients.

5. **RESIDENCES \***  
NULL, New Zealand   
**HOBBIES \***  
Golf   
**LANGUAGES \***  
English   
**AWARDS**  
 CONDE NAST TRAVELLER TRAVEL SPECIALIST  
 ASTA TRAVEL AGENT OF THE YEAR  
 LUXURY TRAVEL ADVISOR AWARDS OF EXCELLENCE  
 TRAVEL AND LEISURE ALIST TRAVEL ADVISOR  
 TRAVEL WISDOM READERS' CHOICE AWARDS  
Please note: awards will be validated before appearing on TravelEdge.com

6. **FIRST NAME \*** Anna **MIDDLE NAME** **LAST NAME \*** Kulej  
**PHONE \*** 415-640-9093 **EMAIL \*** anna.kulej@traveledge.com  
**JOB TITLE/COMPANY NAME \*** Advisor **CITY \*** New York, NY

7. **WEBSITE URL** **WELLING TRAVEL YNCC**  
**FACEBOOK URL** **YOUTUBE URL**  
**LINKEDIN URL** **INSTAGRAM URL**

8. **Reviews & Recommendations**  
What an amazing time we had!  
By Sarah Smith - posted on Aug 11, 2021 - travel date Aug 20, 2021

	Steps		Notes
1.	Check box to make profile public		<ul style="list-style-type: none"> <li>• Check the “Make Public” checkbox for the profile to be active</li> <li>• Profile will NOT show on the Travel Edge website if this is not checked</li> <li>• Updates may take 24 hours to appear</li> <li>• Website: <a href="https://www.traveledge.com/our-advisors">https://www.traveledge.com/our-advisors</a></li> </ul>
2.	Fill in contact details		<ul style="list-style-type: none"> <li>• Mandatory fields marked with *</li> </ul>
3.	Upload profile image and banner image		<ul style="list-style-type: none"> <li>• Banner image is mandatory</li> <li>• Banner image appears at the top of the TE profile page as a highlighted image</li> </ul>
4.	Enter a bio and bio headline		<ul style="list-style-type: none"> <li>• Biography is mandatory</li> <li>• This section will show on the client itinerary automatically</li> </ul>
5.	Add specialty information		<ul style="list-style-type: none"> <li>• Highlight destinations you specialize in</li> <li>• Enter specialties you service</li> <li>• Enter languages you service</li> <li>• Highlight awards and accolades you’ve received</li> </ul>
6.	Add social media links		<ul style="list-style-type: none"> <li>•</li> </ul>
7.	Add reviews and client recommendations		<ul style="list-style-type: none"> <li>• Multiple entries permitted</li> </ul>
8.	Save changes		<ul style="list-style-type: none"> <li>• Updates may take up to 24 hours to appear</li> </ul>

### 1.2.2.2 ADVISOR CONTACT AND IMAGE

Set your advisor contact information on your communication profile for it to show on the itinerary. The default profile is what is used when creating your advisor account. All fields except your email can be updated on your communication profile. Upload an image to show on the itinerary OR leave it blank, it's up to you!

1. Communication Profile

2. Specify Your Address and Upload Your Portrait

3. Default Profile

4. Communication Profile

5. Save Profile Changes

Field	Default Profile	Communication Profile
Name	Anna Kulej	Anna Kulej
Company	Travel Edge HQ	Anna's Travel
Email	Anna.Kulej@worldviewtravel.com	Anna.Kulej@traveledge.com
Phone	714-540-7400	555-444-5666
Mobile		
Fax	714-979-6040	714-979-6040
Address	Suite 1700, 333 City Blvd, West Orange, California, 92868, United States	10 Fun Street Address Line 2 CITY New York COUNTRY United States STATE/PROVINCE New York ZIP/POSTAL CODES 20456

	Steps		Notes
1.	Click Communication profile	•	
2.	Press v on Specify Your Address and Upload Your Portrait	•	<i>First tab</i>
3.	Upload your advisor image	•	<ul style="list-style-type: none"> <li>• <i>Image must be in jpg, jpeg, png or gif format</i></li> <li>• <i>Max file size is 200kb</i></li> </ul>
4.	Update communication profile	•	<i>Everything except for email can be updated</i>
5.	Press SAVE PROFILE CHANGES	•	

### 1.2.2.3 BRAND SETTINGS

The itinerary brand settings allow you choose from two different types of cover pages: **TE branded and White Labeled**  
The Travel Edge theme showcases the TE colors on the cover page whereas the White Label theme has a white background.

The screenshot displays the ADX user interface. At the top, there is a navigation bar with 'ADX', 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a search icon. The user's name 'Anna Kulej' is visible in the top right. Below the navigation bar is a blue banner with the text 'Welcome Anna! Use the following tiles to update any aspect of your ADX profile.' Below the banner are four tiles: 'Communication Profile' (green), 'Access Sharing' (blue), 'Set Preferences' (blue), and 'Change Password' (blue). A line labeled '1.' points to the 'Communication Profile' tile. Below the tiles is the 'Communication Profile' section, which includes a 'Specify Your Address and Upload Your Portrait' dropdown menu, a 'Brand Settings' dropdown menu (highlighted with a blue bar and a line labeled '2.'), and two radio buttons for 'Brand Theme': 'Travel Edge' (selected) and 'White Label' (highlighted with a line labeled '3.'). Below the brand theme section is the 'Itinerary templates' section, which shows two templates: 'TEMPLATE 1' (a dark blue cover with a star and a green star icon) and 'TEMPLATE 2' (a dark blue cover with a star). A line labeled '4.' points to the 'TEMPLATE 1' cover.

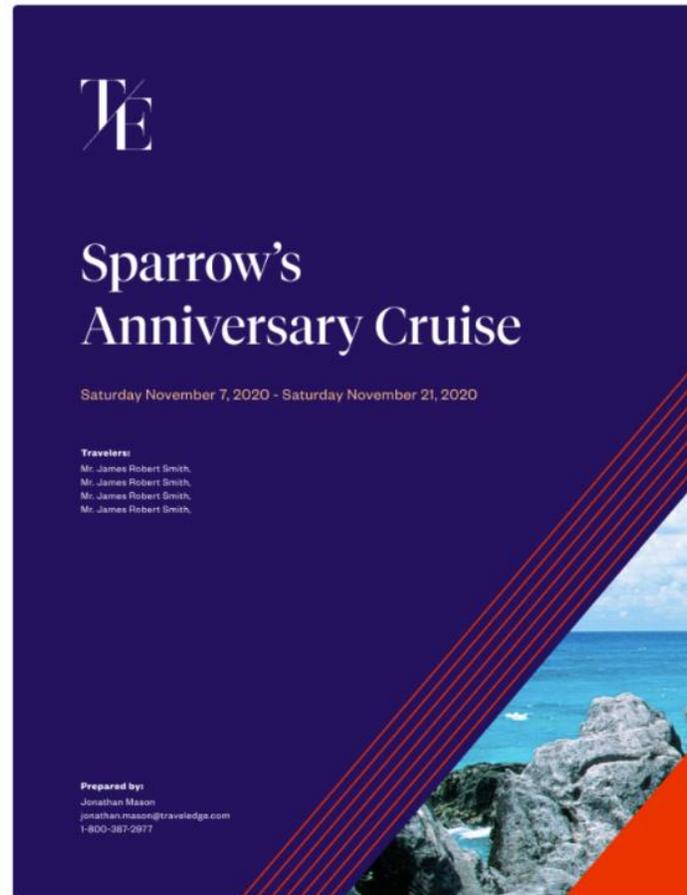
	Section		Notes
1.	Click Communication Profile	•	
2.	Press v on Brand Settings	•	
3.	Press on desired brand theme	•	<ul style="list-style-type: none"> <li>• <i>Travel Edge has TE branded colours</i></li> <li>• <i>White Label has a white background</i></li> </ul>
4.	Click star in corner to select	•	<ul style="list-style-type: none"> <li>• <i>This will set the default for the itinerary</i></li> </ul>

## Travel Edge Templates

Template 1



Template 2



## White Label Templates

Template 1



**Sparrow's  
Anniversary Cruise**

Sat Novr 7, 2020 - Sun Nov 21, 2020

**Travelers:**  
Mr. James Robert Smith, Ms. Alida McLaughlin

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com, 1-800-387-2977

\* Template 2



**Sparrow's  
Anniversary Cruise**

Saturday November 7, 2020 - Saturday November 21, 2020

**Travelers:**  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith.

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com  
1-800-387-2977

\* Template 3



**Sparrow's  
Anniversary Cruise**

Saturday November 7, 2020 - Saturday November 21, 2020

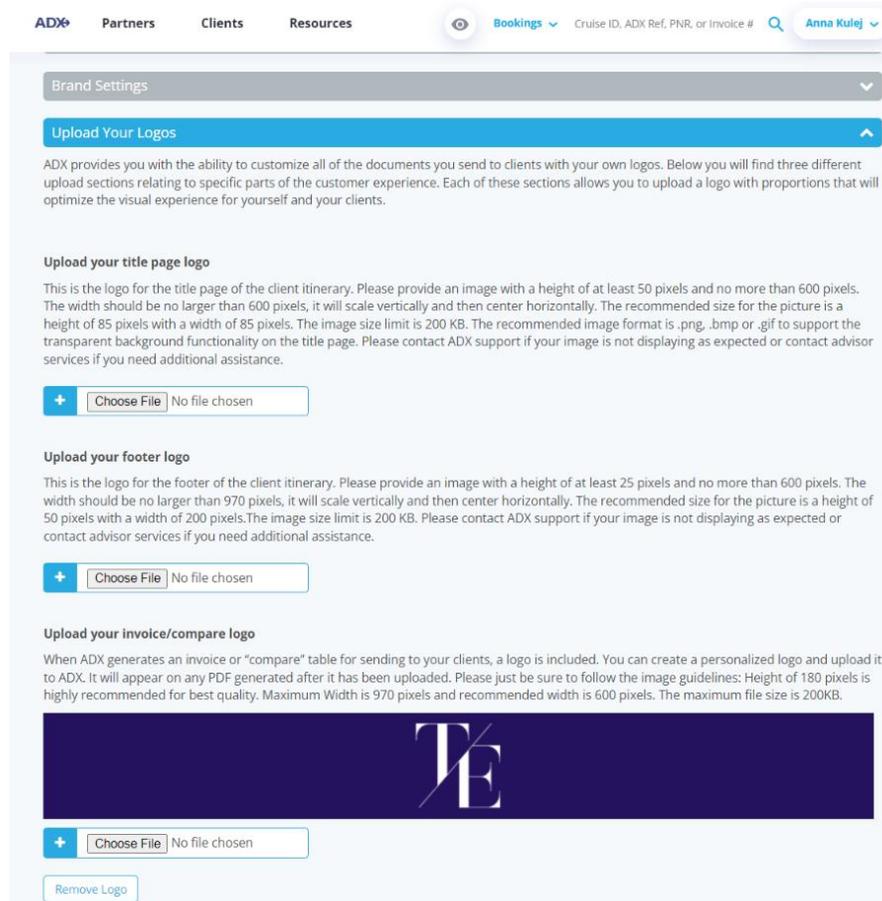
**Travelers:**  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith,  
Mr. James Robert Smith.

**Prepared by:**  
Jonathan Mason  
jonathan.mason@traveledge.com  
1-800-387-2977

#### 1.2.2.4 UPLOADING LOGOS

Your logo can be uploaded and used in three different ways on the client itinerary:

- On the title page
- On the footer of each page
- On the invoice and comparison documents



When uploading files be sure to **check the requirements for each logo type** to ensure it will look proper on the client document.

ADP Partners Clients Resources Settings | [Bookings](#) | [Create ID: ADX Ref: PDR, or modify it](#) | [Area View](#)

**Communication Profile**

Control the appearance and contents of emails and documents.

**Access Sharing**

Share access to your bookings with other ADX users.

**Set Preferences**

Customize default values for certain fields within ADX.

**Change Password**

Change your password at anytime to ensure your account is secure.

### Communication Profile Update Public 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.

Please click on the headings below to update the various communication profile items.

Specify Your Address and Upload Your Portrait

Brand Settings

**Upload Your Logos**

ADX provides you with the ability to customize all of the documents you send to clients with your own logos. Below you will find three different upload sections relating to specific parts of the customer experience. Each of these sections allow you to upload a logo with proportions that will optimize the visual experience for yourself and your clients.

**Upload your title page logo**

This is the logo for the title page of the client itinerary. Please provide an image with a height of 85 pixels with a width of 85 pixels. The image size limit is 200 KB. The recommended background functionality on the title page. Please contact ADX support if you need additional assistance.

+ Choose File No file chosen

**Upload your footer logo**

This is the logo for the footer of the client itinerary. Please provide an image with a height of 50 pixels with a width of 200 pixels. The image size limit is 200 KB. Please contact ADX support if you need additional assistance.

+ Choose File No file chosen

**Upload your invoice/compare logo**

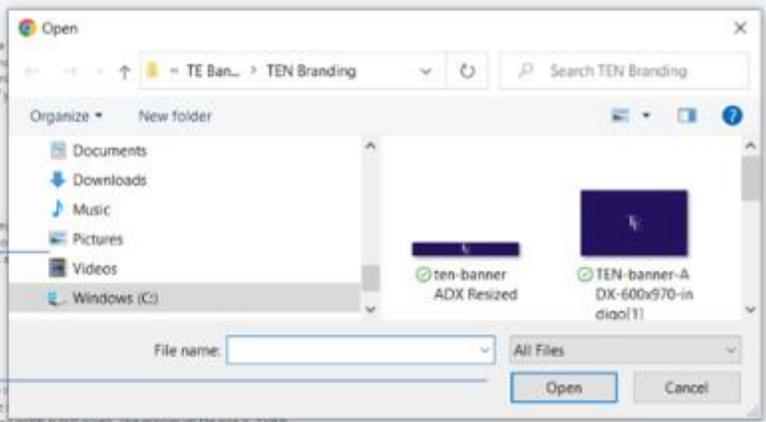
When ADX generates an invoice or "compare" table for sending to your clients, a logo will appear on any PDF generated after it has been uploaded. Please just be sure the logo is highly recommended for best quality. Maximum Width is 970 pixels and recommended width is 400 pixels. The maximum file size is 200KB.

+ Choose File No file chosen

TE

+ Choose File No file chosen

Remove Logo



1.
2.
3.
4.
5.
6.

	Steps		Notes
1.	Click Communication Profile	•	
2.	Click v on Upload Your Logo	•	<i>Third tab down</i>
3.	Click CHOOSE FILE	•	<ul style="list-style-type: none"> <li>• <i>Select from title page, footer, invoice/compare</i></li> <li>• <i>Maximum file size 200 mb</i></li> <li>• <i>Check the min-max height size requirement</i></li> <li>• <i>Check the width min-max size requirement</i></li> <li>• <i>Recommended:</i> <ul style="list-style-type: none"> <li>○ <i>For title logo – 85h x 85w pixels</i></li> <li>○ <i>For footer logo - 50h x 200w pixels</i></li> </ul> </li> <li>• <i>For invoice – 180h x 600w pixels</i></li> </ul>
4.	Locate the file on your computer	•	
5.	Press OPEN	•	<ul style="list-style-type: none"> <li>• <i>This will attach the file to the logo selected</i></li> <li>• <i>If file does not meet requirements an error will appear, and file will not attach</i></li> </ul>
6.	Verify logo	•	<i>Logo will show on page when attached</i>

### 1.2.2.5 DEFINE STANDARD NOTES

Create notes on your profile to easily add to the client itineraries. You can create unlimited notes in your profile.

The screenshot shows the ADX user profile page for Anna Kulej. The navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. A welcome message at the top says 'Welcome Anna! Use the following tiles to update any aspect of your ADX profile.' Below this are four tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Communication Profile' section is expanded, showing options to 'Specify Your Address and Upload Your Portrait', 'Brand Settings', and 'Upload Your Logos'. The 'Define Standard Notes for Inclusion in Client Itineraries' section is also expanded, providing instructions on how to use standard notes. A list of note types includes 'Quote', 'Ticketed', 'Air Compare', and 'Hotel Compare'. A text area contains the example note: 'I found the following itineraries for you. Let me know what you think!'. A '+ Add Note' button is at the bottom left, and a 'Save Message' button is at the bottom right.

1. Communication Profile

2. Define Standard Notes for Inclusion in Client Itineraries

3. + Add Note

4. I found the following itineraries for you. Let me know what you think!

5. Save Message

	Steps		Notes
1.	Click Communication Profile	•	
2.	Click v on Define Standard Notes for Inclusion in Client Itineraries	•	<i>Fourth option down</i>
3.	Press ADD NOTE	•	<i>Name the note</i>
4.	Add note details	•	
5.	Press SAVE MESSAGE	•	<ul style="list-style-type: none"> <li>• <i>Note will be saved on profile</i></li> <li>• <i>Note will appear on client itinerary page and be available to be added</i></li> </ul>

### 1.2.2.6 CUSTOMIZE BODY TEXT OF EMAIL

This section will let you set what appears in the client email when sending out the client itinerary. Each tab will let you set verbiage for all the different types of client documents that are available, we will be focusing on the client itinerary.

1. Communication Profile

2. Customize Body Text of Itinerary Emails

3. Client Itinerary

4. Hello,  
Please find attached the quote for your upcoming trip.  
If you have any questions please give me a call.  
Best Regards,

5. Save Email Templates

	<b>Steps</b>		<b>Notes</b>
1.	Click Communication Profile	•	
2.	Click v on Customize Body Text of Itinerary Emails	•	<i>Sixth tab down</i>
3.	Confirm on Client Itinerary Tab	•	<ul style="list-style-type: none"> <li>• <i>Defaulted option</i></li> <li>• <i>First in the list</i></li> </ul>
4.	Add email communication	•	
5.	Press SAVE EMAIL TEMPLATES	•	

### 1.2.2.8 DEFINE YOUR EMAIL SIGNATURE

Customize the signature that appears in the body of all emails sent out of ADX.

1. ———

2. ———

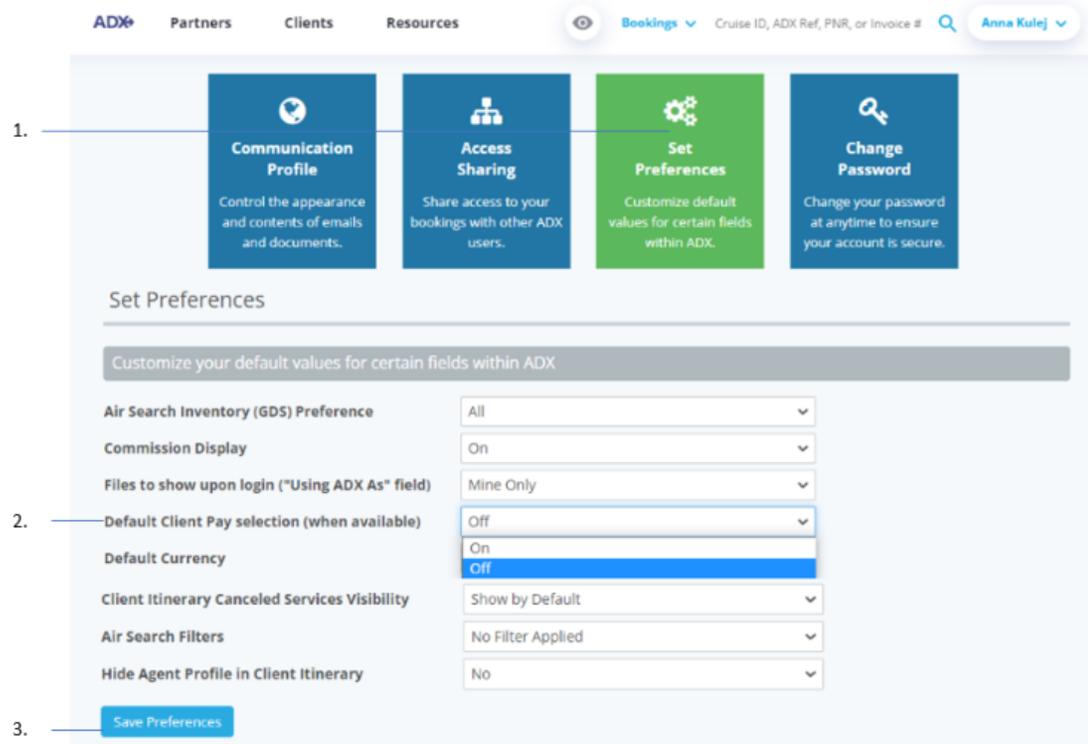
3. ———

4. ———

	Steps		Notes
1.	Click Communication Profile	•	
2.	Click v on Define Your Email Signature Block	•	<i>Seventh tab down</i>
3.	Define signature	•	
4.	Press SAVE EMAIL SIGNAUTRE	•	

### 1.2.2.9 DEFAULT CLIENT PAY OPTION

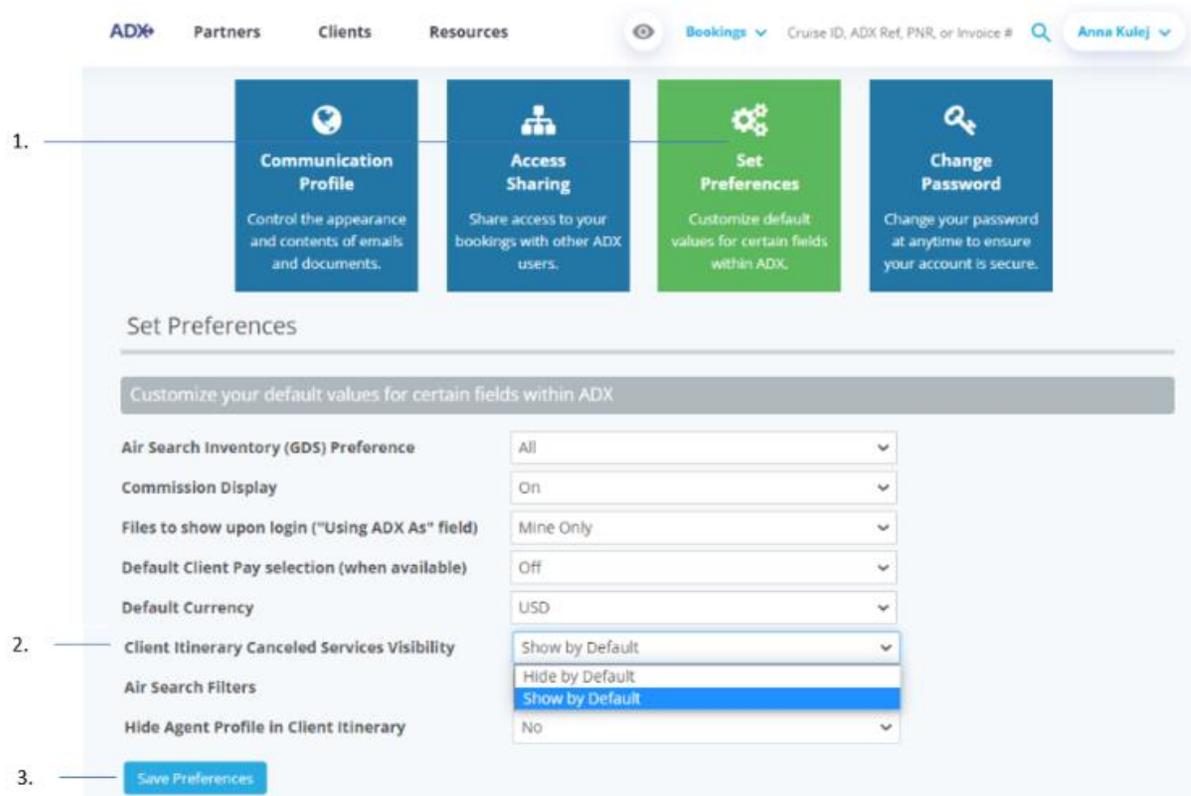
Client Pay allows you to add a payment link on the client itinerary for your client to process their own payments for applicable services. Set the default to ALWAYS show on the itinerary or remove it completely if you don't plan on utilizing this functionality.



☰	Steps	✍️	Notes
1.	Click Set Preferences	•	
2.	Click v for Default Client Pay selection	•	<ul style="list-style-type: none"> <li>• <i>Fourth option down</i></li> <li>• <i>Select ON or OFF</i></li> </ul>
3.	Press SAVE PREFERENCES	•	

### 1.2.2.10 CANCELED SERVICE VISIBILITY

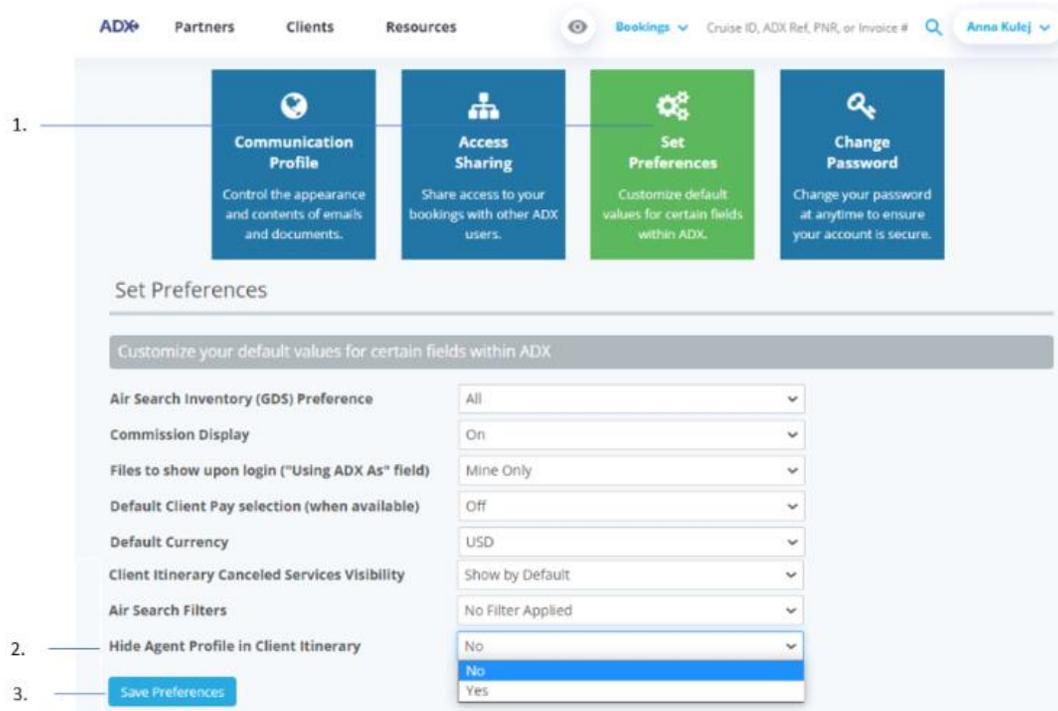
Default option of whether any cancelled services on the reference appear on the client itinerary or get removed automatically.



☰	Steps	✍️	Notes
1.	Click Set Preferences	•	
2.	Click v for Client Itinerary Canceled Services Visibility	•	<ul style="list-style-type: none"> <li>• Sixth option down</li> <li>• Select HIDE or SHOW by default</li> </ul>
3.	Press SAVE PREFERENCES	•	

### 1.2.2.11 HIDE/SHOW AGENT BIO

The agent biography pulls from the public profile page. When active, the itinerary will show the advisor photo as well as the biography paragraph within the executive summary section. Advisor has the option to default this section to be turned on or off on the document. If turned off, the document will simply show a signature line.



☰	Steps	✍️	Notes
1.	Click Set Preferences	•	
2.	Click v for Hide Agent Profile in Client Itinerary	•	<ul style="list-style-type: none"> <li>• Eighth option down</li> <li>• Select No or YES to hide profile</li> </ul>
3.	Press SAVE PREFERENCES	•	

### 1.2.3 Trip Specific Customization – Trip Services Page

Customizations related to specific trips are done directly on the trip reference page. You can personalize the trip name, descriptions, photos and ordering of the services through the TRIP tab of each reference.

The screenshot displays the ADX interface for a trip reference. At the top, navigation links include 'Partners', 'Clients', and 'Resources'. A search bar contains 'Anna Kulej'. The main header shows the trip name 'Jones New York Business Trip' and the advisor 'Sarah Smith'. Below this, the dates 'Monday, June 20, 2022 - Tuesday, June 21, 2022' and the ADX reference '4ZQY TZ' are visible. A 'QUOTE' button is present. A tabbed interface shows 'Trip' as the active tab, with other tabs for 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. A 'Refresh Quote' button is also available. The 'Trip Name' field contains 'Jones New York Business Trip', and the 'Dates' field shows '06/20/2022' to '06/21/2022'. An 'Add details/notes' dropdown is next to the dates. Under 'All Services', two services are listed: 'One-way Los Angeles to New York' and 'St Regis New York'. Each service has a 'Book' button and a 'Remove' button. The 'One-way Los Angeles to New York' service has a 'Rename' link and 'Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules'. The 'St Regis New York' service has a 'Rename' link and 'Actions: Modify'. A 'Reorder Services' action is available. At the bottom, there are two green boxes: 'Estimated Quote' showing 'USD \$36.00' and 'Potential Commission' showing 'USD \$9.00' with an 'Add Insurance' button; and 'Client Documents' showing 'Insurance offered' with an 'Update' button. The footer contains 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary' buttons.

### 1.2.3.1 CUSTOMIZE DETAILS AND NOTES

Personalize the itinerary buy updating the trip name, add a trip description, confirm your advisor background, attach pretendent documents and a cover image.

The screenshot displays the ADX system interface for customizing a trip. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. The main header shows the trip name 'Jones New York Business Trip', the dates 'Monday, June 20, 2022 - Tuesday, June 21, 2022', and the advisor 'Sarah Smith'. The ADX reference number is '4ZQY TZ'. The interface is divided into several sections: 'Trip Name' (Jones New York Business Trip), 'Dates' (06/20/2022 to 06/21/2022), 'Description' (Air fare and hotel details provided), 'Advisor Background' (What started out as a keen desire to plan and organize, turned into a live long career of creating beautifully crafted memories for my friends, family and clients.), and 'Advisor-only Notes' (Sent May 10th. Need to follow up.). There are also sections for 'Upload Attachments' and 'Upload Cover Image', both with 'Choose File' buttons. A 'Save changes' button is located at the bottom right.

1. ADX Ref. 4ZQY TZ | Archive | Copy Quote | Link Bookings
2. Trip | Client & Travelers | Payment | Service Fees | Manage
3. Trip Name: Jones New York Business Trip
4. Description: Air fare and hotel details provided
5. Upload Attachments: Choose File | No file chosen
6. Upload Cover Image: Choose File | No file chosen
7. Advisor Background: What started out as a keen desire to plan and organize, turned into a live long career of creating beautifully crafted memories for my friends, family and clients.
8. Advisor-only Notes: Sent May 10th. Need to follow up.

	Steps		Notes
1.	Open the ADX reference	•	
2.	Click the TRIP tab	•	
3.	Update the Trip Name	•	<i>This shows on the title page</i>
4.	Add a description	•	<i>This shows on the executive summary section</i>
5.	Upload an attachment file	•	<i>This will get added as an attachment on the itinerary page</i>
6.	Upload a cover image	•	<i>This image will show on the title page</i>
7.	Confirm Advisor Background information	•	<i>This will pull from Public Profile</i>
8.	Press SAVE CHANGES	•	

### 1.2.3.2 HOTEL AND ACTIVITIES DESCRIPTIONS

Hotel and activities description details can get lengthy with redundant information for your client. You can edit the description fields on the service to streamline the information provided.

The screenshot displays a travel management system interface for a trip named "Jones New York Business Trip". At the top, there are navigation tabs: "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". A callout labeled "1." points to the "Trip" tab. Below the navigation is a summary section with "Trip Name" (Jones New York Business Trip) and "Dates" (06/20/2022 to 06/21/2022). A callout labeled "2." points to a service card for "St Regis New York" with dates "Jun 20, 2022 - Jun 21, 2022". The card includes "Actions: Modify" and "Remove", and lists details such as "Rate Type: TE Preferred Partner Sabre", "Check In: Jun 20, 2022", "Check Out: Jun 21, 2022", "Phone: 1-212-753-4500", "Website: WWW.STREGIS.COM", and "Address: TWO 5TH AVENUE AT 55TH STREET, New York, United States, 10022". A callout labeled "3." points to the "SERVICE DETAILS" section, which contains fields for "Rate Name: STARS", "Rooms: 1 Room (2 Adults)", "Hotel Overview" (Year Built: 1904, Year Remodeled: 2013), "Hotel Benefits" (No benefits specified), and "Rate Description" (STARS EXCLUSIVE RATE - AUTHORIZED TRAVEL ADVISORS ONLY, INCLUDES WIFI, DELUXE - BUTLER SERVICE, GUEST ROOM, 2 DOUBLES A DAILY DESTINATION FEE OF USD 5...).

	<b>Steps</b>		<b>Notes</b>
1.	Open the Trip tab		•
2.	Expand the service details		• <i>Press the v to expand</i>
3.	Press the EDIT button on the section		<ul style="list-style-type: none"> <li>• <i>Edits will be saved</i></li> <li>• <i>You can revert to the original text after customizing</i></li> </ul>

### 1.2.3.3 REORDERING SERVICES

Depending on what order you quote your services in, the itinerary may show them out of order – hotel before the air for example. This can be easily fixed by reordering the services on the trip tab.

The screenshot displays the ADX system interface for a trip named "Jones New York Business". A modal dialog titled "REORDER SERVICES" is open, prompting the user to drag-and-drop services to rearrange their order. The dialog lists two services: "ONE-WAY LOS ANGELES TO NEW YORK" and "ST REGIS NEW YORK", both for the dates JUN 20 - JUN 21. Below the list, a message states: "Upon saving, you will apply the current ordering to all days of the quote. Any previous quote-wide service ordering will be updated for the services listed above. Any existing day-specific order you may have saved takes precedence and will remain intact." The dialog has "Cancel" and "Save Changes" buttons.

Numbered callouts indicate the following elements:

1. Trip tab (Client & Travelers)
2. Actions: Reorder Services
3. Refresh Quote button
4. Save Changes button

	<b>Steps</b>		<b>Notes</b>
1.	Open the Trip tab	•	
2.	Press REORDER SERVICES	•	
3.	Reorder services	•	<i>Drag and drop the services into the order desired</i>
4.	Press SAVE CHANGES	•	

## 1.2.4 Itinerary Document Customization – Itinerary Page

The client itinerary length and content can be controlled directly on the itinerary page before emailing or downloading the document. These customizations would be done every time you send the itinerary document. **REMEMBER: To save changes on the client itinerary you MUST press the Save/View Client Itinerary Changes button for them to take effect.**

1. —————

The screenshot shows a web interface for managing a business trip. At the top, there are navigation tabs: 'ADD', 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a dropdown menu. The user's name 'Anna Kulej' is visible in the top right. The main header displays the trip name 'Jones New York Business Trip' and the dates 'Monday, June 20, 2022 - Tuesday, June 21, 2022'. The advisor's name 'Sarah Smith' and 'Advisor: Anna Kulej' are also shown. Below the header, there are several tabs: 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. A 'Refresh Quote' button is located on the right. The 'Trip Name' field contains 'Jones New York Business Trip' and the 'Dates' field shows '06/20/2022' and '06/21/2022'. Below this, there is a section for 'All Services' with a 'View by' dropdown. Two services are listed: 'One-way Los Angeles to New York' and 'St Regis New York'. Each service has a 'Book' button and a 'Remove' button. At the bottom, there are two summary boxes: 'Estimated Quote' showing 'USD \$36.00' and 'Potential Commission' showing 'USD \$9.00', and 'Client Documents' showing 'Insurance offered'. A dark footer bar contains three buttons: 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

2. —————

	Steps		Notes
1.	Open the trip reference	•	
2.	Press SEND ITINERARY	•	<i>Settings are changed directly on the itinerary page before sending/downloading</i>

### 1.2.4.1 SELECT SERVICES AND ADDITIONAL INFORMATION

You can select what services to show and remove from the itinerary by unselecting the service checkboxes. Unselecting a service will remove that entire section from the client document including pricing breakouts.

The screenshot shows the ADX interface for customizing a client itinerary. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. The main content area is titled '< BACK TO ITINERARY' and contains several sections:

- SPECIFY EMAIL CONTENTS:** Fields for FROM (noreply@traveledge.com), TO (sarah@smith.com), SUBJECT (Jones New York Business Trip), and BODY (Hello, Please find attached details for your itinerary. If you have any questions please give me a call. Best Regards, Anna Kulej).
- ATTACHMENTS:** Client Itinerary (See Below)
- CUSTOMIZE CLIENT ITINERARY:**
  - Travel Services:** A section with a blue border and numbered callouts 1 through 4. It contains a list of services with checkboxes:
    - 1.  ONE-WAY LOS ANGELES TO NEW YORK
    - 2.  IN-ST REGIS NEW YORK
    - 3.  PLANNING FEE (PAYABLE)
    - 4.  24/7 SUPPORT (PAYABLE)
  - Additional Information:**  DISPLAY AIRFARE BRAND INFORMATION,  DISPLAY HOTEL MAP
  - INCLUDE CLIENT PAYMENT LINK:** A green box with a title and a date/time selector (06/20/2022, 00:00 AM, Eastern Time (ET)).
  - Cover Page:**  HIDE COVER PAGE
  - Detailed Services:**  HIDE DETAILED SERVICES

	Steps		Notes
1.	Check/uncheck box next to service to remove		<ul style="list-style-type: none"> <li>• <i>Unchecked services will not show on the client itinerary</i></li> </ul>
2.	Check/uncheck box next to additional information		<ul style="list-style-type: none"> <li>• <i>Display or hide air branded information</i></li> <li>• <i>Display or hide hotel map</i></li> </ul>
3.	Check/uncheck planning fee		<ul style="list-style-type: none"> <li>• <i>Fees are added through the trip services page</i></li> </ul>
4.	Check/Uncheck 247 support service		<ul style="list-style-type: none"> <li>• <i>24/7 service added through the trip service page</i></li> </ul>

### 1.2.4.2 CLIENT PAY LINK

Default setting from the advisor profile will determine whether the link will automatically be added or not. You can check/uncheck the link on the document manually as well. You can also set the parameters around the length of time the link is valid for.

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

[← BACK TO ITINERARY](#)

**SPECIFY EMAIL CONTENTS**

FROM: noreply@traveledge.com

TO: sarah@smith.com

SUBJECT: Jones New York Business Trip

BODY

**B I U** Normal Default

Hello,  
Please find attached details for your itinerary.  
If you have any questions please give me a call.  
Best Regards,  
Anna Kulej

Edits here apply to this message only - please see your advisor profile to edit your default signature and email text.

ATTACHMENTS [Client Itinerary \(See Below\)](#)

**CUSTOMIZE CLIENT ITINERARY**

Travel Services

Please check all services you want to appear on the client itinerary. Additional Information

ONE-WAY LOS ANGELES TO NEW YORK  DISPLAY AIRFARE BRAND INFORMATION

IN ST REGIS NEW YORK  DISPLAY HOTEL MAP

PLANNING FEE (PAYABLE)

24/7 SUPPORT (PAYABLE)

**1.** This itinerary includes services eligible for client payment.  **INCLUDE CLIENT PAYMENT LINK**  
Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

**2.** 06/20/2022 00:00 AM Eastern Time (ET)

Cover Page

HIDE COVER PAGE

Detailed Services

HIDE DETAILED SERVICES

	<b>Steps</b>		<b>Notes</b>
1.	Check/uncheck the Include client payment link checkbox		<ul style="list-style-type: none"> <li>• <i>Unchecked services will not show on the client itinerary</i></li> </ul>
2.	Set date and time parameters		<ul style="list-style-type: none"> <li>• <i>This sets the active timeframe for the link</i></li> <li>• <i>Once the date/time has passed the client will no longer be able to use the link to process payment</i></li> </ul>

1.2.4.3 COVER PAGE

You can remove the cover page from the client document by checking the Hide cover page box.



< BACK TO ITINERARY

SPECIFY EMAIL CONTENTS

FROM: noreply@traveledge.com

TO: sarah@smith.com

SUBJECT: Jones New York Business Trip

BODY:
 

**B I U** Normal Default

Hello,  
Please find attached details for your itinerary.

If you have any questions please give me a call.

Best Regards,

Anna Kulej

Edits here apply to this message only - please see your advisor profile to edit your default signature and email text.

ATTACHMENTS Client Itinerary (See Below)

CUSTOMIZE CLIENT ITINERARY

Travel Services

Please check all services you want to appear on the client itinerary.

Additional Information

ONE-WAY LOS ANGELES TO NEW YORK

DISPLAY AIRFARE BRAND INFORMATION

IN ST REGIS NEW YORK

DISPLAY HOTEL MAP

PLANNING FEE (PAYABLE)

24/7 SUPPORT (PAYABLE)

This itinerary includes services eligible for client payment.

INCLUDE CLIENT PAYMENT LINK

Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

06/20/2022 00:00 AM Eastern Time (ET)

Cover Page

HIDE COVER PAGE

Detailed Services

HIDE DETAILED SERVICES

1.2.4.4 EXECUTIVE SUMMARY

Depending on what type of document you are sending to your client, you can display or hide flight segments in the executive summary section by checking/unchecking the box.

### Round Trip Flights: Los Angeles - New York

Itinerary Status **QUOTE**

**Sunday, September 18, 2022 – Saturday, September 24, 2022**

No assigned travelers.

DATE	TIME		EVENT	DESCRIPTION
<b>SEP</b> <b>18</b>	06:30 AM 02:38 PM		<b>Departure:</b> Los Angeles (LAX) , Terminal 0 <b>Arrival:</b> Miami (MIA) <b>Via:</b> Miami	AMERICAN AIRLINES (AA) 529, Economy
	05:50 PM 08:45 PM		<b>Departure:</b> Miami (MIA) <b>Arrival:</b> New York (JFK) , Terminal 8	AMERICAN AIRLINES (AA) 1247, Economy
<b>SEP</b> <b>18</b>			<b>Check-in:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>19</b>			<b>Stay:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>20</b>			<b>Stay:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>21</b>			<b>Stay:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>22</b>			<b>Stay:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>23</b>			<b>Stay:</b> New York Marriott Downtown	<b>Address:</b> 85 WEST ST AT ALBANY ST New York 10006 United States
<b>SEP</b> <b>24</b>	09:00 AM 12:00 PM		<b>Departure:</b> New York (JFK) , Terminal 8 <b>Arrival:</b> Austin (AUS) <b>Via:</b> Austin	AMERICAN AIRLINES (AA) 2813, Economy
	01:44 PM 02:53 PM		<b>Departure:</b> Austin (AUS) <b>Arrival:</b> Los Angeles (LAX) , Terminal 0	AMERICAN AIRLINES (AA) 533, Economy

### Travel Services

Please check all services you want to appear on the client itinerary.

Additional Information

ROUND-TRIP LOS ANGELES TO NEW YORK

DISPLAY AIRFARE BRAND INFORMATION

NEW YORK MARRIOTT DOWNTOWN

DISPLAY HOTEL MAP

24/7 SUPPORT

AUTOMATICALLY ADDED FEE

### Cover Page

HIDE COVER PAGE

### Executive Summary

DISPLAY ALL FLIGHT SEGMENTS IN THE EXECUTIVE SUMMARY

### Detailed Services

HIDE DETAILED SERVICES

### Financial Information

HIDE THE PRICING SECTION

HIDE FINANCIAL INFORMATION FROM THE T&CS. PLEASE BE AWARE THAT IN DOING SO YOU ACCEPT ALL LEGAL RESPONSIBILITY FOR ANY REGULATORY COMPLIANCE COMPLAINTS THAT ARE RAISED FROM THE USE OF THIS DOCUMENT RELATED TO THE DISPLAY OF PRICING.

INCLUDE PRICE PER PASSENGER BREAKDOWN FOR ADX AIR SERVICES.

INCLUDE HOTEL RATE PER NIGHT FOR ADX HOTELS.

### Hotel Information

HIDE ALL BUT THE FIRST AND LAST DAY OF A HOTEL STAY

HIDE HOTEL - HOW TO GET THERE SECTION

### Tour Information

HIDE ALL BUT THE FIRST AND LAST DAY OF TOURS

### Cruise Information

HIDE ALL BUT THE FIRST AND LAST DAY OF NON-ADX CRUISE

### 1.2.4.5 REMOVE DETAILED SERVICE INFORMATION

To remove all of the details of the services and in turn shorten the client document to just the executive summary section, you can hide the detailed service section for each service.

Monday,  
June 20,  
2022

**St Regis New York**

TWO 5TH AVENUE AT 55TH STREET  
New York, 10022,  
United States  
Phone: 1-212-753-4500

---

# Stars Exclusive Rate

Check-in	Stay
Jun 20, 2022	1 Night

---

**Amenities**

Bar	Fitness Center	Restaurant
Business Center	High Speed Internet	Rollaway Bed Available
Concierge	Laundry Facilities	Room Service
Crib Available	Meeting Room Available	Wheelchair Accessible
Dining Room	Parking	
Dry cleaning	Recreation facilities	

**Overview**

Year Built - 1904 Year Remodeled - 2010 Additional Property Description - Since its founding by John Jacob Astor over a century ago, The St. Regis New York has established itself as one of Manhattan's most alluring luxury hotels. Our historic 5-star hotel has evolved to reflect the rich heritage of St. Regis, while infusing the timeless elegance that has come to define it. Every element of the hotel is carefully considered, from the richly decorated rooms and designer suites to the graceful public spaces, highlighted by a regal rooftop ballroom with sweeping Manhattan views. Exceptional dining at Astor Court and the world-class King Cole Bar - home to the nation's first Bloody Mary - further enhance the experience. Enjoy thoughtful hotel amenities, including the treasured St. Regis Butler Service and usage of the chauffeur-driven Bentley House Car to explore the best of NYC during your next stay.

**Rate Description**

STARS EXCLUSIVE RATE -AUTHORIZED TRAVEL ADVISORS ONLY-, INCLUDES WIFI, DELUXE - BUTLER SERVICE, GUEST ROOM, 2 DOUBLES A DAILY DESTINATION FEE OF USD 50 PLUS TAX WILL BE ADDED TO THE ROOM RATE  
FEE INCLUDES A FOOD AND BEVERAGE CREDIT OF USD 50 AND MORE  
MAX OCCUPANCY- 3 GUESTS DELUXE, 2 DOUBLES, 450SQFT/41SQM, LIVING/SITTING AREA, WIRELESS INTERNET, FOR A FEE, WIRED INTERNET, FOR A FEE RATE INCLUDES COMPLIMENTARY BREAKFAST FOR 2 DAILY, EARLY CHECK IN AND LATE CHECK OUT IF AVAILABLE WELCOME AMENITY AND GM NOTE WELCOMING GUEST  
UPGRADE OF ROOM TYPE IF AVAILABLE  
GUARDIAN ANGEL SERVICE 4 HOURS RESPONSE ST  
REGIS AND LUXURY COLLECTION 100 USD FOOD AND BEVERAGE CREDIT THE CREDIT CAN ONLY BE USED ON INCIDENTAL SPEND THAT HAS INCURRED DURING THE STAY UP TO 100 USD THIS INCLUDES DINING SERVICES ONLY AND EXCLUDES THE MINIBAR CREDIT MUST BE USED DURING THE ORIGINAL RESERVATION AND IS NOT VALID ON CONSECUTIVE RESERVATIONS IN THE SAME HOTEL THE CREDIT CANNOT BE APPLIED TOWARD THE ROOM RATE AND IS NOT VALID ON ROOM AND TAX GRATUITIES SERVICE CHARGES OR SERVICES PROVIDED BY A THIRD PARTY THERE WILL BE NO REFUND ISSUED ON ANY UNUSED PORTION OF THE CREDIT THE CREDIT IS NONTRANSFERABLE AND CANNOT BE COMBINED WITH ANY OTHER OFFER OR PROMOTION

**How to get there**

Primary Airport - EWR - Newark Liberty International Airport - 16.00 MI SW Other Airports - JFK - John F Kennedy International Airport - 16.00 MI SE LGA - LaGuardia Airport - 12.00 MI E Directions to Property from EWR - Newark Liberty International Airport - Take Interstate 95 (New Jersey Turnpike) Northbound. Follow signs to the Lincoln Tunnel (Pay \$6 toll). Exit the tunnel and follow signs for uptown (to the left). You will be on 10th Avenue. Turn Right (east) onto 40th Street. Proceed 6 blocks to the east. Turn left (North) onto Madison Avenue. At 55th Street, turn left (west). The St. Regis is on 55th Street between Madison and Fifth Avenues, on the left hand side. Directions to Property from JFK - John F Kennedy International Airport - Upon leaving the airport, follow signs to

< BACK TO ITINERARY

SPECIFY EMAIL CONTENTS

FROM:

TO:

SUBJECT:

BODY:   
**B I U** Normal Default

Hello,  
 Please find attached details for your itinerary.  
 If you have any questions please give me a call.  
 Best Regards,  
 Arma Klutj

Edits here apply to this message only - please see your advisor profile to edit your default signature and email text.

ATTACHMENTS Client Itinerary (See Below)

CUSTOMIZE CLIENT ITINERARY

Travel Services

- Please check all services you want to appear on the client itinerary. Additional Information
- ONE-WAY LOS ANGELES TO NEW YORK  DISPLAY AIRFARE BRAND INFORMATION
  - 1-NIGHT REGIS NEW YORK  DISPLAY HOTEL MAP
  - PLANNING FEE (PAYABLE)
  - 24/7 SUPPORT (PAYABLE)

This itinerary includes services eligible for client payment.  INCLUDE CLIENT PAYMENT LINK

Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

Cover Page

HIDE COVER PAGE

Detailed Services

HIDE DETAILED SERVICES

1.2.4.6 FINANCIAL INFORMATION

Pricing breakdowns are shown in the pricing section as well as in the terms and conditions. You can opt to hide these sections by checking the box next to the selection. You can also opt to show the per person pricing when an air service is on an itinerary, the default is to have this breakdown turned off.

**Pricing**

Item	Cost	Taxes and Fees	Total Cost
One-way Los Angeles to New York	\$349.64 USD	\$55.42 USD	\$405.06 USD
St Regis New York	\$1,245.00 USD	\$244.52 USD	\$1,489.52 USD
Planning Fee	\$50.00 USD	\$0.00 USD	\$50.00 USD
24/7 Support	\$60.00 USD	\$0.00 USD	\$60.00 USD
<b>Total</b>	<b>\$1,704.64 USD</b>	<b>\$299.94 USD</b>	<b>\$2,004.58 USD</b>

**Terms & Conditions**

The travel-related products, services, fares and other information (the "Travel Offerings") set forth in this Itinerary, Quote, and/or Invoice, as applicable (Each hereafter referred to as a "Travel Record") are provided by the suppliers of such products and services which may include, without limitation, airlines, cruise line operators, travel insurers, hotels, and local ground operators (in each case a "Supplier" and collectively the "Suppliers").

Passports must be valid at least six months beyond the date of travel. Ensure that you have all documentation required for travel outside of North America. Entry into a country may be refused even if the required information and travel documents are complete.

Living standards and practices at the destination and the standards and conditions there with respect to the provision and utilities, services and accommodation may differ from those found in North America.

No price increases are permitted after the customer has paid in full. If a price increase is more than 7% (except increases resulting from an increase in GST/PST/HST), the customer has the right to cancel the contract and obtain a full refund.

Additional airline baggage fees may apply. Changes to itinerary may result in airline penalties and fees.

Air Service Prices are subject to change until ticketed and full amount is paid.

Suppliers may charge a fee for any cancellation or modification to your booked Travel Offering. Most travel bookings are non-refundable and cancelled bookings will incur charges. These charges can be up to 100% of the cost of the booking, whether or not your travel has commenced. Please refer to the supplier's terms and conditions for more information.

This Travel record is subject to Terms & Conditions. [Click here to review the Terms & Conditions \(http://www.adxtravel.com/legal\)](http://www.adxtravel.com/legal). Please read and ensure you understand these Terms & Conditions when considering the Travel Offerings. By completing this booking for the Travel Offerings, you agree to the Terms & Conditions.

Each Travel Offering is subject to additional terms and conditions imposed by the applicable Supplier of such Travel Offering, which may vary from the Terms & Conditions.

IT IS YOUR RESPONSIBILITY TO READ AND UNDERSTAND THE SUPPLIER'S TERMS AND CONDITIONS RESPECTING ANY TRAVEL OFFERING. BY COMPLETING THIS BOOKING FOR THE TRAVEL OFFERINGS, YOU ALSO AGREE TO THE SUPPLIER'S TERMS AND CONDITIONS.

In the case of California, registration as a seller of travel does not constitute approval by the State of California.

**Pricing**

Item	Cost	Taxes and Fees	Total Cost
One-way Los Angeles to New York	\$349.64 USD	\$55.42 USD	\$405.06 USD
St Regis New York	\$1,245.00 USD	\$244.52 USD	\$1,489.52 USD

**Travel Services**

Please check all services you want to appear on the client itinerary.

**✈️ ROUND-TRIP LOS ANGELES TO NEW YORK**

**🏨 NEW YORK MARRIOTT DOWNTOWN**

**📞 24/7 SUPPORT**

**📄 AUTOMATICALLY ADDED FEE**

**Additional Information**

**DISPLAY AIRFARE BRAND INFORMATION**

**DISPLAY HOTEL MAP**

**Cover Page**

**HIDE COVER PAGE**

**Executive Summary**

**DISPLAY ALL FLIGHT SEGMENTS IN THE EXECUTIVE SUMMARY**

**Detailed Services**

**HIDE DETAILED SERVICES**

**Financial Information**

**HIDE THE PRICING SECTION**

**HIDE FINANCIAL INFORMATION FROM THE T&CS. PLEASE BE AWARE THAT IN DOING SO YOU ACCEPT ALL LEGAL RESPONSIBILITY FOR ANY REGULATORY COMPLIANCE COMPLAINTS THAT ARE RAISED FROM THE USE OF THIS DOCUMENT RELATED TO THE DISPLAY OF PRICING.**

**INCLUDE PRICE PER PASSENGER BREAKDOWN FOR ADX AIR SERVICES.**

**INCLUDE HOTEL RATE PER NIGHT FOR ADX HOTELS.**

**Hotel Information**

**HIDE ALL BUT THE FIRST AND LAST DAY OF A HOTEL STAY**

**HIDE HOTEL - HOW TO GET THERE SECTION**

**Tour Information**

**HIDE ALL BUT THE FIRST AND LAST DAY OF TOURS**

**Cruise Information**

**HIDE ALL BUT THE FIRST AND LAST DAY OF NON-ADX CRUISE**

### 1.2.4.7 SERVICE SPECIFIC INFORMATION

Sections related to specific service type will have extra customizations that you can control on the client itinerary. For example, you can choose to hide all but the first and last days for hotel and, tour and cruise trips as well as the getting there information for hotel.

**Financial Information**

- HIDE THE PRICING SECTION
- HIDE FINANCIAL INFORMATION FROM THE T&C. PLEASE BE AWARE THAT IN DOING SO YOU ACCEPT ALL LEGAL RESPONSIBILITY FOR ANY REGULATORY COMPLIANCE COMPLAINTS THAT ARE RAISED FROM THE USE OF THIS DOCUMENT RELATED TO THE DISPLAY OF PRICING.
- INCLUDE PRICE PER PASSENGER BREAKDOWN FOR AIR AIR SERVICES.

**Hotel Information**

- HIDE ALL BUT THE FIRST AND LAST DAY OF A HOTEL STAY
- HIDE HOTEL - HOW TO GET THERE SECTION

**Tour Information**

- HIDE ALL BUT THE FIRST AND LAST DAY OF TOURS

**Cruise Information**

- HIDE ALL BUT THE FIRST AND LAST DAY OF NON-AIR CRUISE

**Insurance Offerings**

As some jurisdictions require travel insurance to be offered to all clients, ADX includes messaging on all client documents about any insurance products that have been sold or declined. If insurance has been sold through ADX documents will automatically reflect this detail.

- INSURANCE OFFERED**  
Use this option when you have sent a quote for travel insurance to your client, and they have not responded yet.
- INSURANCE PURCHASED IN ADX**  
This option is only available when insurance has been sold or invoiced via ADX. Return to the Trip Services Page to quote & sell insurance using ADX or add an external invoice for an insurance product sold outside of ADX and this option will be automatically selected.
- INSURANCE PURCHASED**  
Use this option if you have sold insurance to your client and have not invoiced through ADX. Please provide the name of the insurance product or policy:
- INSURANCE OFFERED AND DECLINED**  
Choose this option if you have offered your client travel insurance and they have chosen not to purchase a policy through you. Also use this option if your client has purchased an insurance policy themselves.

**Itinerary Notes**

Use this section to include notes and comments for your clients within the PDF travel document you are sending.

**NOTE TEXT**

Rich text editor with options: Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Normal, Default, and Link/Unlink icons.

**PREDEFINED NOTES**

- 
- 
- 
- 

[Save/View Client Itinerary Changes](#)

#### 1.2.4.8 INSURANCE OFFERING

Insurance offering messaging gets added to the Terms and Conditions to meet some jurisdiction requirements. When insurance is purchased directly through ADX the default will set to the purchased status. When advisors are adding insurance externally or the client has declined, that messaging can be selected on the itinerary page.

##### Terms & Conditions

The travel-related products, services, fares and other information (the "Travel Offerings") set forth in this Itinerary, Quote, and/or Invoice, As applicable (Each hereafter referred to as a "Travel Record") are provided by the suppliers of such products and services which may include, without limitation, airlines, cruise line operators, travel insurers, hotels, and local ground operators (in each case a "Supplier" and collectively the "Suppliers").

Passports must be valid at least six months beyond the date of travel. Ensure that you have all documentation required for travel outside of North America. Entry into a country may be refused even if the required information and travel documents are complete.

Trip cancellation and out-of-province insurance was offered and declined.

Living standards and practices at the destination and the standards and conditions there with respect to the provision and utilities, services and accommodation may differ from those found in North America.

No price increases are permitted after the customer has paid in full. If a price increase is more than 7% (except increases resulting from an increase in GST/PST/HST), the customer has the right to cancel the contract and obtain a full refund.

Additional airline baggage fees may apply. Changes to itinerary may result in airline penalties and fees.

Air Service Prices are subject to change until ticketed and full amount is paid.

Suppliers may charge a fee for any cancellation or modification to your booked Travel Offering. Most travel bookings are non-refundable and cancelled bookings will incur charges. These charges can be up to 100% of the cost of the booking, whether or not your travel has commenced. Please refer to the supplier's terms and conditions for more information.

This Travel record is subject to Terms & Conditions. [Click here to review the Terms & Conditions \(http://www.adxtravel.com/legal\)](http://www.adxtravel.com/legal).

Please read and ensure you understand these Terms & Conditions when considering the Travel Offerings. By completing this booking for the Travel Offerings, you agree to the Terms & Conditions.

Each Travel Offering is subject to additional terms and conditions imposed by the applicable Supplier of such Travel Offering, which may vary from the Terms & Conditions.

IT IS YOUR RESPONSIBILITY TO READ AND UNDERSTAND THE SUPPLIER'S TERMS AND CONDITIONS RESPECTING ANY TRAVEL OFFERING. BY COMPLETING THIS BOOKING FOR THE TRAVEL OFFERINGS, YOU ALSO AGREE TO THE SUPPLIER'S TERMS AND CONDITIONS.

In the case of California, registration as a seller of travel does not constitute approval by the State of California.

#### Financial Information

- HIDE THE PRICING SECTION
- HIDE FINANCIAL INFORMATION FROM THE T&C. PLEASE BE AWARE THAT IN DOING SO YOU ACCEPT ALL LEGAL RESPONSIBILITY FOR ANY REGULATORY COMPLIANCE COMPLAINTS THAT ARE RAISED FROM THE USE OF THIS DOCUMENT RELATED TO THE DISPLAY OF PRICING.
- INCLUDE PRICE PER PASSENGER BREAKDOWN FOR ADX AIR SERVICES.

#### Hotel Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF A HOTEL STAY
- HIDE HOTEL - HOW TO GET THERE SECTION

#### Tour Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF TOURS

#### Cruise Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF NON-ADX CRUISE

#### Insurance Offerings

As some jurisdictions require travel insurance to be offered to all clients, ADX includes messaging on all client documents about any insurance products that have been sold or declined. If insurance has been sold through ADX documents will automatically reflect this detail.

##### INSURANCE OFFERED

Use this option when you have sent a quote for travel insurance to your client, and they have not responded yet.

##### INSURANCE PURCHASED IN ADX

This option is only available when insurance has been sold or invoiced via ADX. Return to the Trip Services Page to quote & sell Insurance using ADX or add an external invoice for an insurance product sold outside of ADX and this option will be automatically selected.

##### INSURANCE PURCHASED

Use this option if you have sold insurance to your client and have not invoiced through ADX. Please provide the name of the insurance product or policy:

##### INSURANCE OFFERED AND DECLINED

Choose this option if you have offered your client travel insurance and they have chosen not to purchase a policy through you. Also use this option if your client has purchased an insurance policy themselves.

#### Itinerary Notes

Use this section to include notes and comments for your clients within the PDF travel document you are sending.

##### NOTE TEXT

**B I U** Normal Default

##### PREDDEFINED NOTES

- 
- 
- 
- 

[Save/View Client Itinerary Changes](#)

1.2.4.9 ADDING ITINERARY NOTES

Predefined notes are set up on the advisor profile and show under the Itinerary Notes section to be added. Any note created on the profile will appear in the list and can be added by clicking on the note title. Agents can also create a manual note for the itinerary by entering the text into the text box and pressing the SAVE button to add it.

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

### Jones New York Business Trip

Monday, June 20, 2022 – Tuesday, June 21, 2022

For Ms. Greta Jones

DATE	TIME	EVENT	DESCRIPTION
JUN 20		Check-in: St Regis New York	Address: TWO 5TH AVENUE AT 55TH STREET New York 10022 United States
	05:24 PM	Departure: Los Angeles (LAX) , Terminal 0 Via: Las Vegas	AMERICAN AIRLINES (AA) 739, Economy
JUN 21	07:00 AM	Arrival: New York (JFK) , Terminal 8	
		Check-out: St Regis New York	Address: TWO 5TH AVENUE AT 55TH STREET New York 10022 United States

**VIP SUPPORT**  
 24/7 Access  
 Toll-Free (North America): 1 (888) 481-2004  
 Global: 1-(547) 288-3059

**Notes**

Trip Description  
 Air fare and hotel details provided

**Important Information**  
 I found the following itineraries for you. Let me know what you think!



Hello Greta,

What started out as a keen desire to plan and organize, turned into a life long career of creating beautifully crafted memories for my friends, family and clients.

Sincerely,

Anna Kulej

#### Financial Information

- HIDE THE PRICING SECTION
- HIDE FINANCIAL INFORMATION FROM THE FACE. PLEASE BE AWARE THAT IN DOING SO YOU ACCEPT ALL LEGAL RESPONSIBILITY FOR ANY REGULATORY COMPLIANCE COMPLAINTS THAT ARE RAISED FROM THE USE OF THIS DOCUMENT RELATED TO THE DISPLAY OF PRICING.
- INCLUDE PRICE PER PASSENGER BREAKDOWN FOR ADX AIR SERVICES

#### Hotel Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF A HOTEL STAY
- HIDE HOTEL - HOW TO GET THERE SECTION

#### Tour Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF TOURS

#### Cruise Information

- HIDE ALL BUT THE FIRST AND LAST DAY OF NON-ADX CRUISE

#### Insurance Offerings

As some jurisdictions require travel insurance to be offered to all clients, ADX includes messaging on all client documents about any insurance products that have been sold or declined. If insurance has been sold through ADX documents will automatically reflect this detail.

##### INSURANCE OFFERED

Use this option when you have sent a quote for travel insurance to your client, and they have not responded yet.

##### INSURANCE PURCHASED IN ADX

This option is only available when insurance has been sold or invoiced via ADX. Return to the Trip Services Page to quote & sell insurance using ADX or add an external invoice for an insurance product sold outside of ADX and this option will be automatically selected.

##### INSURANCE PURCHASED

Use this option if you have sold insurance to your client and have not invoiced through ADX. Please provide the name of the insurance product or policy:

##### INSURANCE OFFERED AND DECLINED

Choose this option if you have offered your client travel insurance and they have chosen not to purchase a policy through you. Also use this option if your client has purchased an insurance policy themselves.

#### Itinerary Notes

Use this section to include notes and comments for your clients within the PDF travel document you are sending.

##### NOTE TEXT

**B** **I** **U** **🔗** **☰** **☰** Normal **⌵** Default **⌵** **🔗**

##### PREFERRED NOTE

- Quote
- Ticketed
- Air Compare
- Hotel Compare

[Save/View Client Itinerary Changes](#)

### 1.3.SETTING UP AUTOMATED EMAILS

The additional emails in ADX need to be opted into in order for client to receive them. They DO NOT get automatically sent without advisor consent. Email defaults can also be formatted in the advisor profile.

#### 1.3.1 Opting Into Automated Emails

All additional emails MUST be opted into before ADX can send them to your client. The Opt In will happen in two places:

- **Client Profile** – Birthday Greeting, Passport Renewal
- **Trip Services Page** – Bon Voyage, Welcome Home

##### 1.3.1.1 CLIENT PROFILE OPT INS

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

The image displays two screenshots of the 'CREATE NEW CLIENT' form. The left screenshot shows the full form with a blue box highlighting the 'SEND BIRTHDAY GREETING' checkbox. The right screenshot is a zoomed-in view of the form, showing the 'SEND BIRTHDAY GREETING' checkbox is unchecked. A blue arrow points from the checkbox in the left screenshot to the checkbox in the right screenshot.

**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  MAIL 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  EXPIRE DATE

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

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

OPTIONAL LOYALTY PROGRAMS

TYPE  VENDOR  NUMBER

OPTIONAL PASSPORT

NUMBER  ISSUING COUNTRY  EXPIRY DATE

PASSPORT EXPIRY NOTIFICATION

### 1.3.1.2 TRIP SERVICES PAGE OPT INS

Each trip can opt into sending out Bon Voyage and Welcome Home. This is done on each individual trip reference and is related to the dates of ALL the services on the reference. Check the SEND EMAILS checkbox on the MANAGE tab of each trip reference.

The screenshot displays the ADX system interface for a trip reference. At the top, there are navigation tabs: Partners, Clients, Resources, Bookings, and a search bar. The main header shows the trip details: "Round Trip Flights: New York - Miami" for the dates Thursday, May 26, 2022 - Monday, May 30, 2022. The advisor is listed as Anna Kulej. Below the header, there are tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. The Manage tab is active, and a red arrow points to the "SEND BON VOYAGE AND WELCOME HOME EMAILS" checkbox in the "Bon Voyage & Welcome Home Email Messages" section. This section also includes a field for "SEND TO THE FOLLOWING EMAIL ADDRESSES" with the value "cara@jones.com". Below this, there is a preview of the email message, which includes a "BON VOYAGE" graphic and the text: "Enjoy your trip! If I can be of any further assistance before you travel, please do not hesitate to contact me. My email address and phone numbers can be found below. Kind regards." The interface also features a "USE DEFAULT" checkbox and a "Save" button at the bottom right of the email configuration area.

### 1.3.2 Setting up Default Messaging

Default messaging can be customized for all additional emails through the client profile. You set defaults once and they will be utilized every time the emails are sent.

1. ADX Partners Clients Resources Settings

2. Communication Profile

3. Customize Body Text of Itinerary Emails

4. Client Itinerary Compare Table Client Statement Invoice Planning Fee Agreement Itinerary Greeting Passport Renewal

5. Passport Expiry Notification

6. All the best.

7. Save Email Templates

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

### Communication Profile

Update Public 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 ADI.

Please click on the headings below to update the various communication profile items.

- Specify Your Address and Upload Your Portrait
- Brand Settings
- Upload Your Logos
- Define Standard Notes for Inclusion in Client Itineraries
- Define Standard Service Descriptions for Planning Fee Agreements
- Customize Body Text of Itinerary Emails
- Define Your Email Signature Block

8. **Customize Body Text of Bon Voyage and Welcome Home Emails**

You can set ADI to automatically send your clients Bon Voyage and Welcome Home emails before/after they travel. We have provided default wording for these emails, but you can customize the text below if you prefer.

**Note - ADI will use the email signature you have defined above so no need to put your name and contact information in the default text of this message.**

9. You have the option of automatically sending clients well wishes on their trip departure and return dates. To customize these standard greetings, please edit the information on the right. You will be able to tailor them for each client, if desired, on their trip quote page.

10. **BON VOYAGE**

Enjoy your trip!  
If I can be of any further assistance before you travel, please do not hesitate to contact me. My email address and phone numbers can be found below.  
Kind regards.

Bon Voyage Welcome Home

EMAIL SUBJECT  
Bon Voyage!

**B I U** [List] [Link] [Image] [Table] [Code] [Quote] [Unquote] [Undo] [Redo] [Font] [Size]

Enjoy your trip!  
If I can be of any further assistance before you travel, please do not hesitate to contact me. My email address and phone numbers can be found below.  
Kind regards.

11. Preview [USE DEFAULT] Save

12. Set Advisor Loyalty Number for Hotels

	Steps		Notes
8.	Click "Customize Body Text of Bon Voyage and welcome Home Emails"	•	<i>Eighth tab down in the list</i>
9.	Click the Bon Voyage/Welcome Home tab	•	
10.	Customize text	•	
11.	Click "Use Default" checkbox	•	<i>The default text will be used every time emails go out</i>
12.	Click SAVE	•	

## 1.4. DOCUMENT DELIVERY

Client documents do not get automatically sent via ADX. Advisor can choose to send directly from ADX or download the file as a PDF. Documents sent out of ADX directly will come from **noreply@traveledge.com**<sup>2</sup>. Primary advisor will be cc'd on all outbound emails out of ADX.

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

[+ BACK TO ITINERARY](#)

Specify Email Contents

FROM:

TO:

SUBJECT:

BODY

**B I U** Normal Default

Hello,  
Please find attached the invoice for your upcoming trip.  
If you have any questions please give me a call.  
Best Regards,  
Anna Kulej

Edits here apply to this message only – please see your advisor profile to edit your default signature and email text.

ATTACHMENTS: Invoice (See Below)

REMINDER: It is your responsibility to remind your clients of any conditions related to the purchase of travel services that may affect their decision to purchase, including health warnings, travel advisories or construction at destination properties.

Invoice Starts Below

TRIP REF 51M4W4

INVOICE NO. 29029790 TRAVELEDGE CORP.

FOR CLIENT: Cara Jones  
123 Sunny Drive, Brooklyn  
NY 20678, United States

TRAVEL CONSULTANT: Anna Kulej  
Office: 1-800-387-2977

ISSUED: 05 Oct 2021  
PRINTED: 10 May 2022

2786 MILWAUKEE RD, Beloit  
Alabama 53511, United States  
TravelEdge Dev Office -TICO# 50023253 Test

---

HOTEL : RESIDENCE INN LA JOLLA MARRIOTT, LA JOLLA

TRAVELERS	BASE	TAXES	TOTAL
Jones/Cara	USD \$630.77	USD \$0.00	USD \$630.77

HOTEL INFORMATION CONFIRMATION: 256-6672257

[Download PDF](#)
[Send Email](#)

<sup>2</sup> Affiliate partners will see noreply@adxtravel.com

### 1.4.1 Sending Client Documents

Advisors can opt to send the client documents directly out of the ADX system. Doing so would track the document sent on the client profile as well as on the trip services page for that reference. The document would be delivered from address [noreply@traveledge.com](mailto:noreply@traveledge.com)<sup>3</sup> and document would be attached to the email as a PDF. Primary advisor will be CC'd automatically on the email.

1. FROM: noreply@traveledge.com

2. TO: sarah@smith.com

3. SUBJECT: One Way Flight: Los Angeles to New York

4. CUSTOMIZE CLIENT ITINERARY

5. HIDE THE PRICING SECTION

<sup>3</sup> Affiliate partners will see [noreply@adxtravel.com](mailto:noreply@adxtravel.com)

	Steps		Notes
1.	Verify FROM field		<ul style="list-style-type: none"> <li>• <i>If you have your TE email in your communication profile you can change this from no reply to your TE by pressing the v</i></li> <li>• <i>If you have a custom email in your communication profile you will not be able to change this</i></li> </ul>
2.	Verify the TO field		<ul style="list-style-type: none"> <li>• <i>If client's email is in their profile it will auto populate</i></li> <li>• <i>To send to multiple users use the , and add the email</i></li> </ul>
3.	Verify/update subject and body of the email		<ul style="list-style-type: none"> <li>• <i>Default will pull in from advisor profile</i></li> </ul>
4.	Customize the document as needed		<ul style="list-style-type: none"> <li>• <i>Each email type will have its own customization available</i></li> <li>• <i>Customizing the email requires you to press the SAVE button before emailing to generate the update</i></li> </ul>
5.	Press SEND EMAIL		<ul style="list-style-type: none"> <li>• <i>Located at the bottom right of the page</i></li> </ul>

## 1.4.2 Downloading Client Documents

Documents can be downloaded to send and save on your computer. This feature will be available for the following types of documents:

- Client Itinerary
- Service comparisons
- Payment Invoice
- Client Statement
- Fee Agreement

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

[← BACK TO ITINERARY](#)

**SPECIFY EMAIL CONTENTS**

FROM: noreply@traveledge.com

TO: sarah@smith.com

SUBJECT: One Way Flight: Los Angeles to New York

BODY:

**B I U** Normal : Default

Hello,  
Please find attached the quote for your upcoming trip.

If you have any questions please give me a call.

Best Regards,  
Anna Kulej

Edits here apply to this message only - please see your advisor profile to edit your default signature and email text.

ATTACHMENTS [Client Itinerary \(See Below\)](#)

**CUSTOMIZE CLIENT ITINERARY**

Travel Services

Please check all services you want to appear on the client itinerary. Additional Information

ONE-WAY LOS ANGELES TO NEW YORK  DISPLAY AIRFARE BRAND INFORMATION

1.  HIDE COVER PAGE

Detailed Services

HIDE DETAILED SERVICES

Financial Information

2.  HIDE THE PRICING SECTION

[Download PDF](#) [Send Email](#)

	Steps		Notes
1.	Customize as required and available		<ul style="list-style-type: none"><li>• <i>Different email types allow for different customizations</i></li><li>• <i>IF customizing press SAVE before downloading file</i></li></ul>
2.	Press DOWNLOAD PDF button		<ul style="list-style-type: none"><li>•</li></ul>

## 1.5. TRACKING SENT DOCUMENTS

Sending client documents out of ADX will track the original document content as well as the date sent. Tracking information can be found on the client profile as well as on the individual trip services page under the MANAGE tab. You will be able to review the original email sent as well as RESEND directly from the trip page.

**Client Profile**

Client Information

NAME: Miss Sarah Smith  
 BIRTHDAY: 4 May 1981  
 GENDER: Female  
 PHONE: 416-444-4343  
 ADVISOR (PRIMARY): Anna Kulej

EMAIL: sarah@smith.com  
 INVOICE ADDRESS: 123 Sunny Drive, San Diego, California, United States, 94323  
 BILLING ADDRESS: Same as Invoice Address  
 UPCOMING TRIP: None  
 LAST TRAVELLED: 13 April 2022, 7H13PS

**QUOTES & BOOKINGS FOR MISS SARAH SMITH**

Quote Name	Depart	Services	Updated
New Trip Planning Quote	02.07.23		09.05.22
One Way Flight: Los Angeles to N...	20.06.22		06.05.22
One Way Flight: Los Angeles to N...	25.05.22		06.05.22
One Way Flight: Los Angeles to N...	24.05.22		05.05.22
Deluxe Travel Protection Plan Quote	30.05.22		05.05.22

**Sent Emails (48)**

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS
9 May 2022	Quote	4ZQVYZ	One Way Flight: Los Angeles to New York	sarah@smith.com
2 Feb 2022	Quote	7H13PS	Round Trip Flights: Toronto - Paris	john.wippersteg@trip-arc.com
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippersteg@trip-arc.com
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippersteg@trip-arc.com
1 Jun 2021	Quote	4Z0HND	Round Trip Flights: Los Angeles - Paris	sarah@smith.com

Client Profile

**One Way Flight: Los Angeles to New York**  
 Monday, June 20, 2022 - Tuesday, June 21, 2022

ADP Ref: 4ZQVYZ | Archive | Copy Quote | Link Bookings

**Manage**

**Sent Emails**

Date Sent	Email Type	Attachments	Recipients
May 9, 2022	Quote		sarah@smith.com

**Bon Voyage & Welcome Home Email Messages**

SEND BON VOYAGE AND WELCOME HOME EMAILS (these are sent out on trip departure and return dates)

SEND TO THE FOLLOWING EMAIL ADDRESSES: sarah@smith.com

To personalize the Bon Voyage and Welcome Home greetings, please edit the message on composer on the right. You can update the standard greetings on your My Profile page.

Preview: Bon Voyage | Welcome Home

Trip Services Page