



Quick Guide –
Customize Your Client Itinerary
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.com¹ 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 20678, United States
PRINTED: 09 May 2022

TRAVEL CONSULTANT: Anna Kulej
Office: 1-800-387-2977
2786 MILWAUKEE RD, Beloit
Alabama 35311, United States
TravelEdge Dev Office -TICO# 50023253 Test

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
Vendor: TravelEdge
CONFIRMATION: PFS162723

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
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
CONFIRMATION: 256-6672257

Payment Summary		
Consultation Fee	USD	\$150.00
Total Hotel	USD	\$630.77
Invoice Total	USD	\$780.77
Paid on 05 Oct 2021 - Merchant XXXXXXXXXXXXX1881	USD	\$780.77
Amount Paid	USD	\$780.77
Paid in Full		

TRAVELEDGE CORP.
TRIP REF 51M4W4

INVOICE NO. 29029790
FOR CLIENT: Cara Jones
123 Sunny Drive, Brooklyn
NY 20678, United States
ISSUED: 05 Oct 2021
PRINTED: 09 May 2022

TRAVEL CONSULTANT: Anna Kulej
Office: 1-800-387-2977
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TRAVELERS	BASE	TAXES	TOTAL
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Invoice Total	USD \$630.77
Paid on 05 Oct 2021 - Merchant XXXXXXXXXXXXX1881	USD \$630.77
Amount Paid	USD \$630.77
Paid in Full	

¹ Affiliate agencies email will go out from noreply@adxtravel.com

1.1. 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.



Itinerary Status – Quote, In Progress, Travel Ready

Jones New York Business Trip

Itinerary Status **QUOTE**

Monday, June 20, 2022 - Tuesday, June 21, 2022

For Ms. Greta Jones

Executive Summary of services on the itinerary

DATE	TIME		EVENT	DESCRIPTION
JUN 20	05:34 PM		Departure: Los Angeles (LAX), Terminal 0 Via: Las Vegas	AMERICAN AIRLINES (AA) 739, Economy
			Check-in: St Regis New York	Address: TWO 5TH AVENUE AT 55TH STREET New York 10022 United States
JUN 21	07:00 AM		Arrival: New York (JFK), Terminal 0	
			Check-out: St Regis New York	Address: TWO 5TH AVENUE AT 55TH STREET New York 10022 United States

247 VIP support information



INSURANCE

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



VIP SUPPORT

24/7 Access
Toll-Free (North America): 1 (888) 481-2064
Global: 1 (847) 288-3069

Insurance status

Notes

Trip Description

Air fare and hotel details provided

Trip Description from Trip Services page

Important Information

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

Default notes added on itinerary page



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

Advisor image from Advisor Profile page

Advisor background from Public Profile

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

Advisor Contact from Profile

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	
06:04 PM	06:38 PM		
Jun 20	Jun 20		
Terminal 0	Terminal 1		

Cabin: Economy, Class G
Aircraft: AIRBUS A321XLR/200
Brand: MAIN CABIN
Baggage allowance: 0 Piece/Passenger

Passenger Name:
Greta Jones

4h 18m Layover in Las Vegas

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

See Full Fare Rules & Restrictions (<https://bit.ly/aa-travel-edge.com/air-fare-rules/2214223>)

Note: This AA 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	07:00 AM		
Jun 20	Jun 21		
Terminal 1	Terminal 8		

Cabin: Economy, Class G
Aircraft: BOEING 737-800
Brand: MAIN CABIN
Baggage allowance: 0 Piece/Passenger

Passenger Name:
Greta Jones

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

See Full Fare Rules & Restrictions (<https://bit.ly/aa-travel-edge.com/air-fare-rules/2214223>)

Note: This AA 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	\$1,028.24 USD
Hotel/Meal/Paris La Dron	\$100.00 USD	\$0.00 USD	\$100.00 USD
Deluxe Travel Protection Plan	\$110.00 USD	\$0.00 USD	\$110.00 USD
Parking fee	\$100.00 USD	\$0.00 USD	\$100.00 USD
Total	\$1,310.00 USD	\$1,028.24 USD	\$2,338.24 USD

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 12-30-2025.

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 \(http://www.advttravel.com/legal\)](http://www.advttravel.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

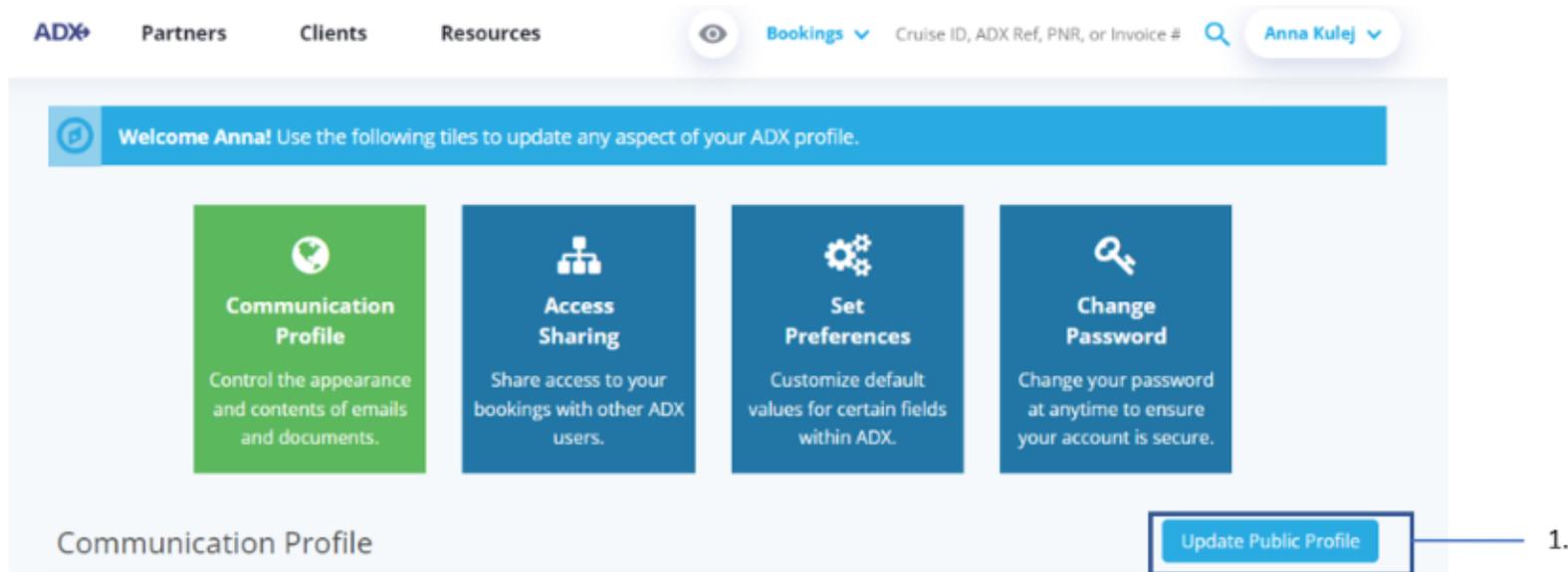
1.2.2 Default Customization – Advisor Profile

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 Advisor Profile page. At the top, there is a navigation bar with 'ADX' logo, 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a search icon. The user's name 'Anna Kulej' is displayed in the top right. 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' (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), and 'Change Password' (Change your password at anytime to ensure your account is secure). Below the tiles is the 'Communication Profile' section, which includes an 'Update Public Profile' button. The section contains a welcome message and a list of items to update, each 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.



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

ADM Partners Clients Resources Bookings Choose ID, ADI, Net, PIR, or Invoice # Anna Kulej

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

1. —————

2. —————

3. —————

4. —————

5. —————

6. —————

7. —————

8. —————

UPDATE AVATAR

Choose File You file chosen

IMAGE SHOULD BE SQUARE AND AT LEAST 200x200 px in size.

IMAGE BROWSE [Update](#)

UPDATE AVATAR

FIRST NAME * Anna

MIDDLE NAME

LAST NAME * Kulej

PHONE * 416-648-9053

EMAIL * anna.kulej@traveledge.com

JOB TITLE/AGENCY NAME * Advisor

CITY * New York, NY

BIOGRAPHY HEADLINE

BIOGRAPHY *

B I U **☰ ☲ ☳**

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.

DESTINATIONS * [Update](#)

NZLL, New Zealand

INTERESTS * [Update](#)

Golf

LANGUAGES * [Update](#)

English

AWARDS

GLOBE TRAVEL TRAVELER TRAVEL SPECIALIST

ASIA TRAVEL AGENT OF THE YEAR

LUXURY TRAVEL ADVISOR AWARDS OF EXCELLENCE

TRAVEL AND LEISURE A LIST TRAVEL ADVISOR

TRAVEL WEEKLY READER'S CHOICE AWARDS

Please note: awards will be validated before appearing on TravelEdge.com

WEBSITE URL

TELEPHONE NUMBER

FACEDBOOK URL

TWITTER URL

LINKEDIN URL

INSTAGRAM URL

[Add Review](#)

Reviews & Recommendations

What an amazing time we had!

By Sarah Smith - posted on Aug 11, 2021 - travel date Aug 20, 2021 [Edit Review](#)

[Save Changes](#)

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

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!

The screenshot shows the ADX user interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar. Below the navigation is a row of four cards: Communication Profile (green), Access Sharing (blue), Set Preferences (blue), and Change Password (blue). A line labeled '1.' points to the Communication Profile card. Below this is the 'Communication Profile' section with an 'Update Public Profile' button. A line labeled '2.' points to the 'Specify Your Address and Upload Your Portrait' heading. Below this heading is a paragraph of text and a note. A line labeled '3.' points to the 'Default Profile' section, which includes a portrait photo of Anna Kulej and a list of contact details. A line labeled '4.' points to the 'Communication Profile' section, which includes a list of contact details and address fields. A line labeled '5.' points to the 'Save Profile Changes' button at the bottom right.

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	ADDRESS 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	•	<i>Image must be in jpg, jpeg, png or gif format</i>
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.

1. Communication Profile
Control the appearance and contents of emails and documents.

2. Brand Settings

3. Brand Theme
Travel Edge White Label

4. Itinerary templates
TEMPLATE 1 TEMPLATE 2

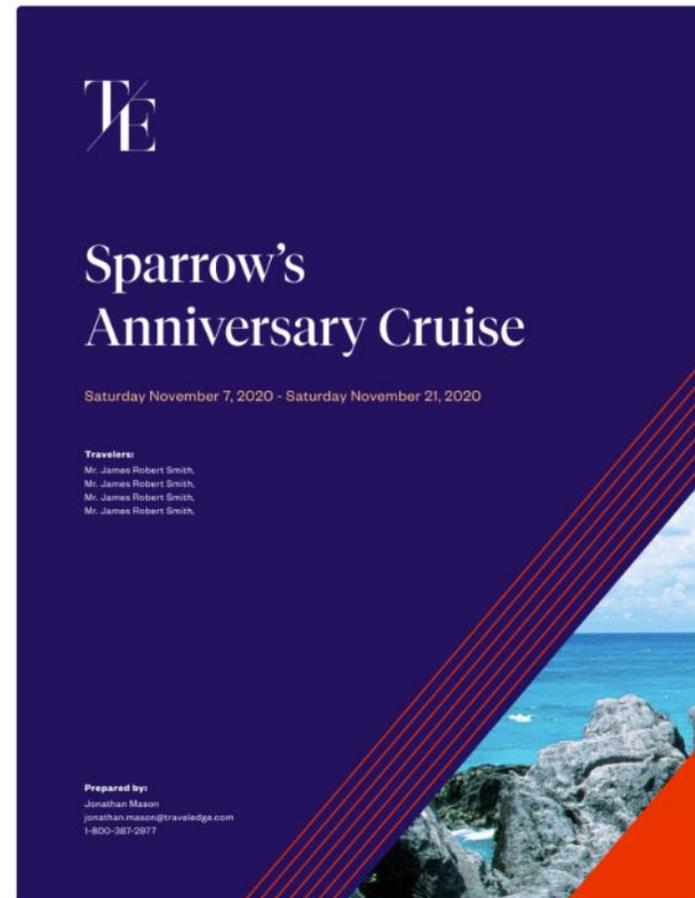
	Section		Notes
1.	Click Communication Profile	•	
2.	Press v on Brand Settings	•	
3.	Press on desired brand theme	•	<ul style="list-style-type: none"> • <i>Travel Edge has TE branded colours</i> • <i>White Label has a white background</i>
4.	Click star in corner to select	•	<ul style="list-style-type: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

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 McLocking

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,
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

The screenshot shows the 'Brand Settings' section of the ADX interface. It features a navigation bar with 'ADX', 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a dropdown menu for 'Anna Kulej'. Below the navigation, there is a 'Brand Settings' dropdown menu and an 'Upload Your Logos' section. The 'Upload Your Logos' section contains three sub-sections: 'Upload your title page logo', 'Upload your footer logo', and 'Upload your invoice/compare logo'. Each sub-section includes a 'Choose File' button and a 'Remove Logo' button. The 'Upload your invoice/compare logo' section also displays a preview of a logo with the letters 'TE' on a dark blue background.

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** Guide | ADP Ref. PKB, or Invoic... Area Billing



Communication Profile
Control the appearance and contents of emails and documents.



Access Sharing
Share access to your bookings with other ADP users.



Set Preferences
Customize default values for certain fields within ADP.



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

1. 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 ADP.

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

Specify Your Address and Upload Your Portrait

Brand Settings

2. Upload Your Logs

ADP 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 allows you to upload a logo with proportions that will optimize the visual experience for yourself and your clients.

3. 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 ADP support if you need additional assistance.

4. 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 ADP support if you need additional assistance.

5. Upload your invoice/compare logo

When ADP 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 highly recommended for best quality. Maximum Width is 970 pixels and recommended width is 500 pixels. The maximum file size is 200KB.

6.

Open

TE Ban... > TEN Branding

Search TEN Branding

Organize New folder

- Documents
- Downloads
- Music
- Pictures
- Videos
- Windows (C:)



ten-banner
ADX Resized



TEN-banner-ADP-600x970-in-diao(1)

File name:

All Files

Open Cancel



	Steps	 Notes
1.	Click Communication Profile	<ul style="list-style-type: none"> •
2.	Click v on Upload Your Logo	<ul style="list-style-type: none"> • <i>Third tab down</i>
3.	Click CHOOSE FILE	<ul style="list-style-type: none"> • <i>Select from title page, footer, invoice/compare</i> • <i>Maximum file size 200 mb</i> • <i>Check the min-max height size requirement</i> • <i>Check the width min-max size requirement</i> • <i>Recommended:</i> <ul style="list-style-type: none"> ○ <i>For title logo – 85h x 85w pixels</i> ○ <i>For footer logo - 50h x 200w pixels</i> • <i>For invoice – 180h x 600w pixels</i>
4.	Locate the file on your computer	<ul style="list-style-type: none"> •
5.	Press OPEN	<ul style="list-style-type: none"> • <i>This will attach the file to the logo selected</i> • <i>If file does not meet requirements an error will appear, and file will not attach</i>
6.	Verify logo	<ul style="list-style-type: none"> • <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 interface. At the top, there is a navigation bar with 'ADX+', 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a search icon, with a dropdown menu showing 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is displayed in the top right.

A blue banner at the top of the profile area says: 'Welcome Anna! Use the following tiles to update any aspect of your ADX profile.' Below this 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.

The 'Communication Profile' section is expanded, showing a list of items: 'Specify Your Address and Upload Your Portrait', 'Brand Settings', 'Upload Your Logos', and 'Define Standard Notes for Inclusion in Client Itineraries'. A line labeled '2.' points to the 'Define Standard Notes' item.

The 'Define Standard Notes' section contains a text area with the following text: 'When you are preparing to send an itinerary, invoice or "compare" table to your clients, ADX gives you the ability to add or edit notes that will be included in the PDF. To save you from re-typing or copying & pasting the same content into each itinerary, you can define one or more standard messages that you can insert into the itinerary before sending it out. You can also pick one message to be defaulted into all PDFs generated by ADX.' Below this text area is a list of note types: 'Quote', 'Ticketed', 'Air Compare', and 'Hotel Compare'. A line labeled '3.' points to the '+ Add Note' button.

Below the list of note types is a text input field containing the text: 'I found the following itineraries for you. Let me know what you think!'. A line labeled '4.' points to this text input field. Below the text input field is a 'Save Message' button. A line labeled '5.' points to this button.

	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"> • <i>Note will be saved on profile</i> • <i>Note will appear on client itinerary page and be available to be added</i>

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

	Steps		Notes
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"> • <i>Defaulted option</i> • <i>First in the list</i>
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.

The screenshot shows the ADX user interface. At the top, there is a navigation bar with 'ADX' and 'Partners', 'Clients', 'Resources', and 'Bookings' (with a dropdown arrow). A search bar contains 'Anna Kotej'. Below the navigation bar are four main menu items: 'Communication Profile' (green), 'Access Sharing' (blue), 'Set Preferences' (blue), and 'Change Password' (blue). A blue line with the number '1.' points to the 'Communication Profile' menu item.

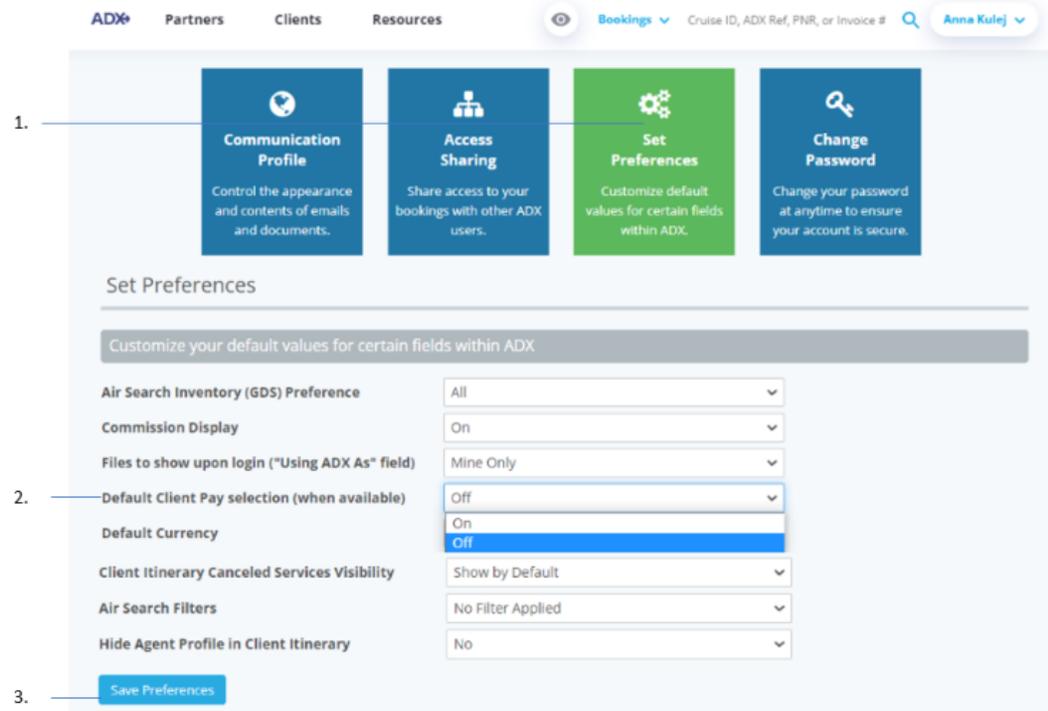
The 'Communication Profile' section is active, showing a 'Welcome to your communications profile...' message and a list of settings to update. A blue line with the number '2.' points to the 'Define Your Email Signature Block' item in this list.

The 'Define Your Email Signature Block' section contains a text area for the signature. A blue line with the number '3.' points to the text area. The text in the area is: 'Anna Smith', 'Office: 714-540-7400', 'Fax: 714-979-4040', 'Email: Anna.Smith@traveledge.com', '2 Queen St E', 'Toronto, California 54323', 'United States'. A blue line with the number '4.' points to the 'Save Email Signature' button at the bottom right of the text area.

	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

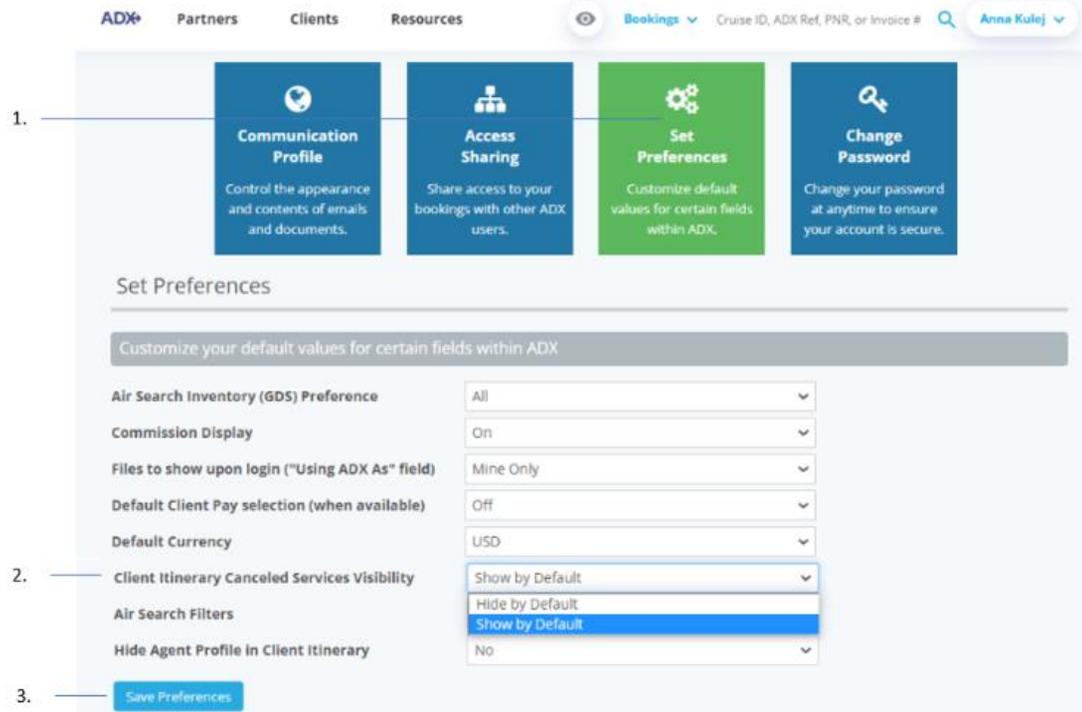
Client Pay allows you to add a payment link on the client itinerary for your client to process their own payments for applicable services. Set the default to ALWAYS show on the itinerary or remove it completely if you don't plan on utilizing this functionality.



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

1.2.2.10 Canceled Service Visibility

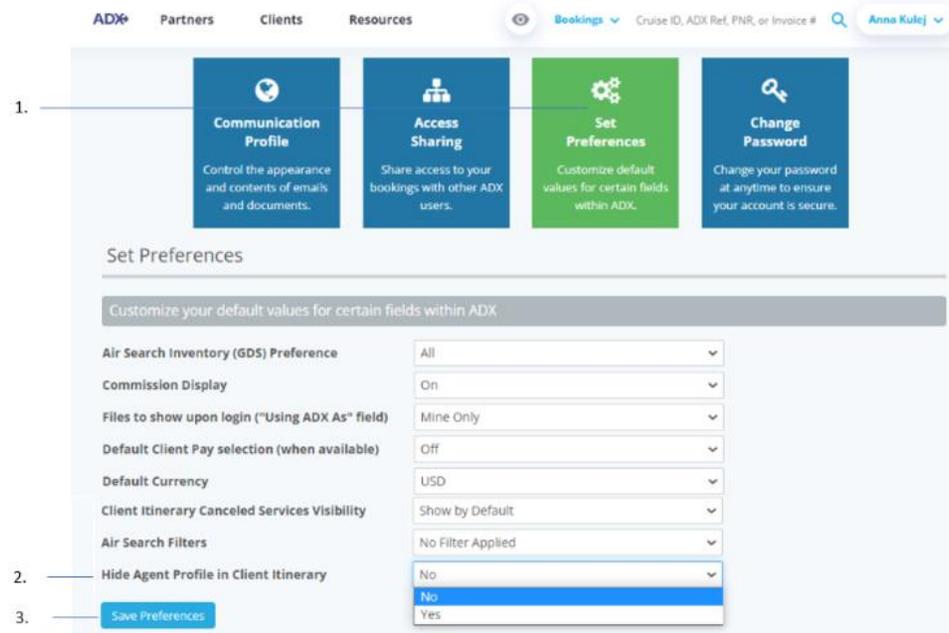
Default option of whether any cancelled services on the reference appear on the client itinerary or get removed automatically.



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

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

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 Bookings interface for a specific trip reference. At the top, there is a navigation bar with 'ADx' logo, 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a filter for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is visible in the top right.

The main header for the trip is 'Jones New York Business Trip', with the dates 'Monday, June 20, 2022 - Tuesday, June 21, 2022'. The advisor is 'Sarah Smith' and 'Advisor: Anna Kulej'. The ADX reference number is '4ZQYTZ'. There are links for 'Archive', 'Copy Quote', and 'Link Bookings', along with a 'QUOTE' button.

Below the header are navigation tabs: 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. A 'Refresh Quote' button is also present.

The 'Trip Name' and 'Dates' section shows a form with 'Jones New York Business Trip' in the name field and dates '06/20/2022' and '06/21/2022' in the date fields. There is an 'Add details/notes' dropdown.

The 'All Services' section shows a list of services. The first service is 'One-way Los Angeles to New York' with dates 'Jun 20, 2022 - Jun 21, 2022'. It has an 'OFFERED' status, a 'Book' button, and a 'Remove' button. The actions for this service are 'Select New Flights', 'Ask Air Support', 'Seat Plan', and 'Fare Rules'. The second service is 'St Regis New York' with the same dates. It also has an 'OFFERED' status, a 'Book' button, and a 'Remove' button. The action for this service is 'Modify'. There is a 'Reorder Services' action button.

The bottom section contains two summary boxes. The first is 'Estimated Quote' showing 'USD \$36.00' and 'Potential Commission USD \$9.00' with an 'Add Insurance' button. The second is 'Client Documents' showing 'Insurance offered' with an 'Update' button.

At the very bottom, there are three buttons: 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

1.2.3.1 Customize Details and Notes

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

	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 service titled "Jones New York Business Trip". At the top, there are navigation tabs: "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". Callout 1 points to these tabs. Below the tabs, the "Trip Name" is "Jones New York Business Trip" and the "Dates" are "06/20/2022" to "06/21/2022". Callout 2 points to a service card for "St Regis New York". The card shows the dates "Jun 20, 2022 - Jun 21, 2022", a "Book" button, and "Actions: Modify". It also lists "Rate Type: TE Preferred Partner Sabre", "Check In: Jun 20, 2022", "Check Out: Jun 21, 2022", "Phone: 1-212-753-4500", and "Website: WWW.STREGIS.COM". The "Address" is "TWO 5TH AVENUE AT 55TH STREET, New York, United States, 10022". A "Cancellation Policy" section states "Refundable before 6/19/2022 12:00:00 AM". An "Other Information" section includes "INCLUDES TAXES AND SURCHARGES", "UPON EARLY DEPARTURE, AN EARLY DEPARTURE CHARGE OF ONE NIGHT ROOM AND APPLICABLE TAX APPLIES.", and "COMMITMENT: HTTPS://CLEAN.MARROTT.COM". Callout 3 points to the "HOTEL DETAILS" section, which includes "Rate Name: STARS", "Rooms: 1 Room (2 Adults)", "Hotel Overview" (Year Built: 1904, Remodeled: 2013), "Hotel Benefits" (No benefits specified), and "Rate Description" (STARS EXCLUSIVE RATE - AUTHORIZED TRAVEL ADVISORS ONLY...). At the bottom, there are buttons for "Add ADX Service", "Add non-ADX Service", and "Send Itinerary".

	Steps		Notes
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"> • <i>Edits will be saved</i> • <i>You can revert to the original text after customizing</i>

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 reorder them. 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 note 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 UI elements:

1. Trip tab (Client & Travelers)
2. Reorder Services action in the Actions menu
3. Refresh Quote button
4. View by dropdown menu

	Steps		Notes
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.**

The screenshot shows the ADX client itinerary page for a trip titled "Jones New York Business Trip" from Monday, June 20, 2022, to Tuesday, June 21, 2022. The page is managed by Sarah Smith, with an advisor Anna Kulej. A callout "1." points to the "ADX Ref. 4ZQYZZ" and "Archive" link. The page features a navigation bar with tabs for "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". Below this, there are input fields for "Trip Name" (Jones New York Business Trip) and "Dates" (06/20/2022 to 06/21/2022). The "All Services" section lists two services: "One-way Los Angeles to New York" and "St Regis New York", each with "Book" and "Remove" buttons. At the bottom, there are sections for "Estimated Quote" (USD \$36.00) and "Client Documents" (Insurance offered). A callout "2." points to the bottom navigation bar which includes "Add ADX Service", "Add non-ADX Service", and "Send Itinerary" buttons.

	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 breakdowns.

The screenshot shows the ADX interface for editing a client document. At the top, there are navigation tabs: Partners, Clients, Resources, Bookings, and a search bar. Below this is a section titled "SPECIFY EMAIL CONTENTS" with fields for FROM (noreply@traveledge.com), TO (sarah@smith.com), and SUBJECT (Jones New York Business Trip). The BODY field contains a draft email with a signature. Below the email content is an "ATTACHMENTS" section with a link to "Client Itinerary (See Below)".

The main section is "CUSTOMIZE CLIENT ITINERARY". It is divided into "Travel Services" and "Additional Information".

- Travel Services:**
 - 1. IF ONE-WAY LOS ANGELES TO NEW YORK
 - 2. 1N/1T REGIS NEW YORK
 - 3. PLANNING FEE (PAYABLE)
 - 4. 24/7 SUPPORT (PAYABLE)
- Additional Information:**
 - DISPLAY AIRFARE BRAND INFORMATION
 - DISPLAY HOTEL MAP

Below these options is a green banner for "INCLUDE CLIENT PAYMENT LINK" with a date and time selector set to 06/20/2022 at 00:00 AM Eastern Time (ET). At the bottom, there are sections for "Cover Page" (with a "HIDE COVER PAGE" checkbox) and "Detailed Services" (with a "HIDE DETAILED SERVICES" checkbox).

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

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.

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: Jones New York Business Trip

BODY: 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.

ONE-WAY LOS ANGELES TO NEW YORK

14th ST REGIS NEW YORK

PLANNING FEE (PAYABLE)

24/7 SUPPORT (PAYABLE)

Additional Information

DISPLAY AIRFARE BRAND INFORMATION

DISPLAY HOTEL MAP

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

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

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,

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.
[X] ONE-WAY LOS ANGELES TO NEW YORK
[X] ST REGIS NEW YORK
[X] PLANNING FEE (PAYABLE)
[X] 24/7 SUPPORT (PAYABLE)
Additional Information
[] DISPLAY AIRFARE BRAND INFORMATION
[] DISPLAY HOTEL MAP

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
SEP 18	06:30 AM 02:38 PM		Departure: Los Angeles (LAX) , Terminal O Arrival: Miami (MIA) Via: Miami	AMERICAN AIRLINES (AA) 529, Economy
	05:50 PM 08:45 PM		Departure: Miami (MIA) Arrival: New York (JFK) , Terminal B	AMERICAN AIRLINES (AA) 1247, Economy
SEP 18			Check-in: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 19			Stay: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 20			Stay: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 21			Stay: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 22			Stay: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 23			Stay: New York Marriott Downtown	Address: 85 WEST ST AT ALBANY ST New York 10006 United States
SEP 24	09:00 AM 12:00 PM		Departure: New York (JFK) , Terminal B Arrival: Austin (AUS) Via: Austin	AMERICAN AIRLINES (AA) 2813, Economy
	01:44 PM 02:53 PM		Departure: Austin (AUS) Arrival: Los Angeles (LAX) , Terminal O	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 - 2013 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,
 Anna Kulig

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

14 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.

AM

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
Total	\$1,704.64 USD	\$299.94 USD	\$2,004.58 USD

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.

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

1.2.4.7 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 ADX AIR SERVICES

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- HIDE HOTEL - HOW TO GET THERE SECTION

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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 [List Icon] [Text Icon] Normal Default [Link Icon]

PREDEFINED NOTES

- Quote
- Ticketed
- Air Compare
- Hotel Compare

[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.

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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

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) 738, Economy
JUN 21	07:00 AM		Arrival: New York (LFK) , Terminal B	
			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) 481-2064
 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 live long career of creating beautifully crafted memories for my friends, family and clients.

Sincerely,

Anna Kulej

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B *I* U Normal : Default :

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Quote

Ticketed

Air Compare

Hotel Compare

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