



Quick Guide –
Document Delivery
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.

CLIENT STATEMENT
TRAVELEDGE CORP.
TRIP REF 51M4W4

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
Vendor: TravelEdge
CONFIRMATION: PF5162723

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

INVOICE NO. 29029790
TRAVELEDGE CORP.
TRIP REF 51M4W4

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
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	
Total Hotel	USD \$630.77
Invoice Total	USD \$630.77
Paid on 05 Oct 2021 - Merchant XXXXXXXXXXXXX1881	USD \$630.77
Amount Paid	USD \$630.77

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

1.1. 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**². Primary advisor will be cc'd on all outbound emails out of ADX.

The screenshot shows the ADX interface for composing an email. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', and 'Bookings'. A search bar contains 'Cruise ID, ADX Ref, PNR, or Invoice #' and a user profile 'Anna Kulej'. The email composition form includes fields for 'FROM' (anna.kulej@traveledge.com), 'TO' (cara@jones.com), and 'SUBJECT' (Invoice #). The 'BODY' field contains a message: 'Hello, Please find attached the invoice for your upcoming trip. If you have any questions please give me a call. Best Regards, Anna Kulej'. Below the body is an 'ATTACHMENTS' section with 'Invoice (See Below)' and a 'REMINDER' section with a disclaimer. The bottom part of the screenshot shows a preview of an invoice document with the Traveledge logo and the following details:

INVOICE NO. 29029790 TRIP REF 51M4W4
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

² Affiliate partners will see noreply@adxtravel.com

1.2.1 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.com³ and document would be attached to the email as a PDF. Primary advisor will be CC'd automatically on the email.

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

< BACK TO ITINERARY

SPECIFY EMAIL CONTENTS

1. FROM noreply@traveledge.com

2. TO sarah@smith.com

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

BODY

H 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

4. Cover Page

HIDE COVER PAGE

Detailed Services

HIDE DETAILED SERVICES

5. Financial Information

HIDE THE PRICING SECTION

Download PDF Send Email

³ Affiliate partners will see noreply@adxtravel.com

	Steps		Notes
1.	Verify FROM field		<ul style="list-style-type: none"> • <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> • <i>If you have a custom email in your communication profile you will not be able to change this</i>
2.	Verify the TO field		<ul style="list-style-type: none"> • <i>If client's email is in their profile it will auto populate</i> • <i>To send to multiple users use the , and add the email</i>
3.	Verify/update subject and body of the email		<ul style="list-style-type: none"> • <i>Default will pull in from advisor profile</i>
4.	Customize the document as needed		<ul style="list-style-type: none"> • <i>Each email type will have its own customization available</i> • <i>Customizing the email requires you to press the SAVE button before emailing to generate the update</i>
5.	Press SEND EMAIL		<ul style="list-style-type: none"> • <i>Located at the bottom right of the page</i>

1.2.2 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

The screenshot shows the ADX interface for customizing a client itinerary email. The top navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar with 'Cruise ID, ADX Ref, PNR, or Invoice #' and a user profile 'Anna Kulej'. A 'BACK TO ITINERARY' link is visible. The 'SPECIFY EMAIL CONTENTS' section includes fields for 'FROM' (noreply@traveledge.com), 'TO' (sarah@smith.com), and 'SUBJECT' (One Way Flight: Los Angeles to New York). The 'BODY' section has a rich text editor with a signature 'Anna Smith'. Below this is an 'ATTACHMENTS' section with a link to 'Client Itinerary (See Below)'. The 'CUSTOMIZE CLIENT ITINERARY' section has two columns: 'Travel Services' and 'Additional Information'. Under 'Travel Services', the checkbox 'ONE-WAY LOS ANGELES TO NEW YORK' is checked. Under 'Additional Information', the checkbox 'DISPLAY AIRFARE BRAND INFORMATION' is unchecked. Below these are sections for 'Cover Page' (with 'HIDE COVER PAGE' unchecked), 'Detailed Services' (with 'HIDE DETAILED SERVICES' unchecked), and 'Financial Information' (with 'HIDE THE PRICING SECTION' unchecked). At the bottom, there are 'Download PDF' and 'Send Email' buttons. A red '1.' points to the 'Cover Page' section, and a red '2.' points to the 'Financial Information' section.

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