



Quick Guide –
Tracking Sent Documents
June 2022

Contents

1. Client Documents	3
1.1. TRACKING SENT DOCUMENTS	4

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.

TRIP REF 51M4W4
TRAVELEDGE CORP.

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 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
		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 JOLL 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: 29029791, issued: 05 Oct 2021	
		Paid in Full	

HOTEL INFORMATION

Vendor: Travel Edge - Hotels
Check In: 12:00 AM

Property: RESIDENCE INN LA JOLL MARRIOTT
Check Out: 12:00 AM
Duration: 4 days
Smoking: N/A

Start: 13 Apr 22
End: 17 Apr 22

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 XXXXXXXXXX1881	USD \$780.77
Amount Paid	USD \$780.77

TRIP REF 51M4W4
TRAVELEDGE CORP.

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

HOTEL : RESIDENCE INN LA JOLL MARRIOTT, LA JOLLA

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

HOTEL INFORMATION

Vendor: Travel Edge - Hotels
Check In: 12:00 AM

Property: RESIDENCE INN LA JOLL MARRIOTT
Check Out: 12:00 AM
Duration: 4 days
Smoking: N/A

Start: 13 Apr 22
End: 17 Apr 22

CONFIRMATION: 256-6672257

Payment Summary

Total Hotel	USD \$630.77
Invoice Total	USD \$630.77
Paid on 05 Oct 2021 - Merchant XXXXXXXXXX1881	USD \$630.77
Amount Paid	USD \$630.77

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

1.1. 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: Anna Kulej (PRIMARY)

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

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	New Trip Planning Quote	02.07.23		09.05.22
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	One Way Flight: Los Angeles to N...	20.06.22		06.05.22
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	One Way Flight: Los Angeles to N...	25.05.22		06.05.22
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	One Way Flight: Los Angeles to N...	24.05.22		05.05.22
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Deluxe Travel Protection Plan Quote	30.05.22		05.05.22

Results: 1 - 5 of 991

Sent Emails (48)

SENT DATE	EMAIL TYPE	ADX REF	EMAIL SUBJECT	EMAIL ADDRESS
9 May 2022	Quote	4ZQY7Z	One Way Flight: Los Angeles to New York	sarah@smith.com
2 Feb 2022	Quote	7H13PS	Round Trip Flights: Toronto - Paris	john.wippensteg@trip-arc.com
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippensteg@trip-arc.com
16 Nov 2021	Quote	7H0G67	Car Rental Trip	john.wippensteg@trip-arc.com
1 Jun 2021	Quote	4Z0HHQ	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: 4ZQY7Z | Archive | Copy Quote | Link Bookings

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