

Quick Guide – Tracking Sent Documents

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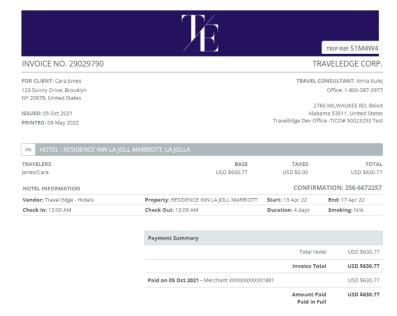
1. Client Documents

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 unless advisor has a Travel Edge email in their profile.

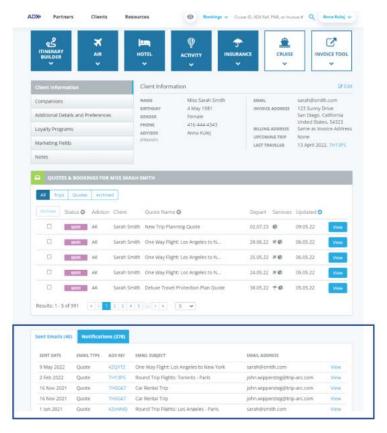


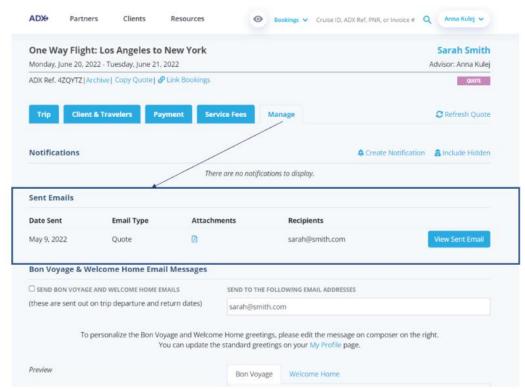


¹ Affiliate agencies email will go out from noreply@adxtravel.com

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.





Trip Services Page

Client Profile