



Quick Guide –  
Searching for Itineraries  
June 2022

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## 1. Post Booking Management

All bookings can be managed directly through ADX. This section will show you extra functionality related to post booking management within the platform. Learn more about topics related to:

- Clients Traveling in 10 Days
- Searching for Itineraries
- Copy an Itinerary Quote
- Link Bookings
- Reordering of Services on an Itinerary
- Removing Quoted Service from a Reference
- Changing Trip Service Views
- Building Multi Service Itineraries
- Archiving Full Itineraries
- Visa Requirements and Sherpa
- Itinerary Notes
- Resending Emails
- Creating Notifications
- Managing Notifications
- Service Fees
- 24/7 Support Fees
- Splitting Payment
- Client Pay
- Manager Access

## 1.1. SEARCHING FOR ITINERARIES

Once you have started building your ADX references, there are several ways you can search for them after the fact.

- ADX Bookings Search
- My Quotes and Bookings Filters
- View All Page
- Client Specific Trips

Client Profile - Trips  
ADX Bookings Search

The screenshot shows the ADX Bookings Search interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains the text "Cruise ID, ADX Ref, PNR, or Invoice #". The user's name "Anna Kulej" is displayed in the top right. Below the navigation is a row of service icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A dropdown menu "USING ADX AS:" is set to "Me". The main content area is titled "MY QUOTES & BOOKINGS" and includes a "VIEW ALL" link. Below this is a "Filters:" section with "Advisors: Me x" and a "Clear Filters" button. The main content is a table with columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. Each row has a "View" button.

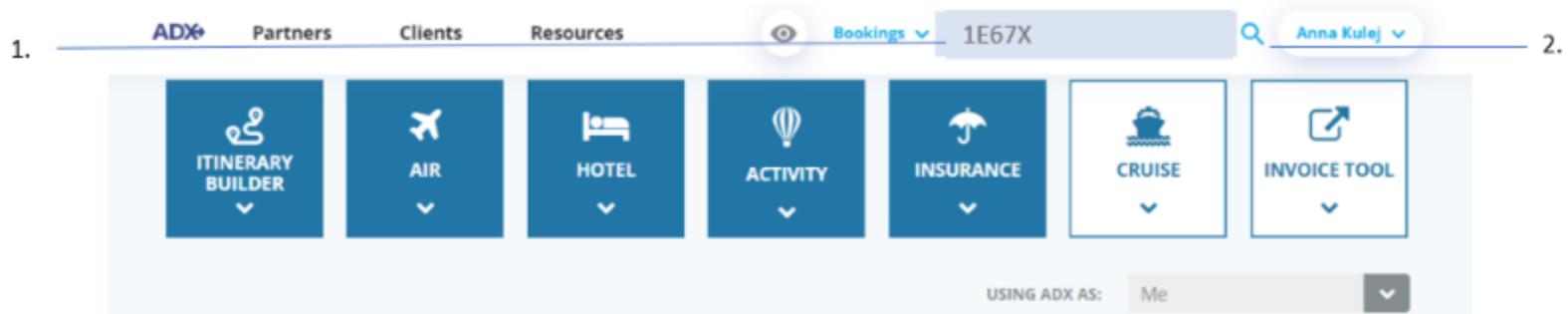
STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22	✈️ 🌍	05.16.22	<a href="#">View</a>
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22	✈️ 🌍	05.16.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22	🏨 🌍	05.09.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23	🌍	05.09.22	<a href="#">View</a>
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22	🏨 🌍	05.06.22	<a href="#">View</a>
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22	🏨 🌍	05.04.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22	✈️ 🌍 🏨	05.04.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22	🛡️ 🌍	05.04.22	<a href="#">View</a>

My Quotes and Bookings  
Filters

View All Page

### 1.2.1 ADX Bookings Search

The bookings search is designed to easily access your reference by means of the specific ADX reference number, the air GDS PNR number or an available invoice number. Enter the identifier into the search box and press the  button. If the reference you have entered lives in ADX, ADX will refer you to the trip services page for that reference.



	Steps	 Notes
1.	Enter search reference	<ul style="list-style-type: none"> <li>• ADX reference is an alpha numeric reference specific to a trip</li> <li>• Invoice number is specific to a sold service on a specific trip</li> <li>• GDS PNR number is the airline locator related to an air booking</li> </ul>
2.	Press the  button	<ul style="list-style-type: none"> <li>• This will search the system for your reference</li> <li>• If reference exists will open the specific ADX trip page</li> </ul>

### 1.2.2 My Quotes and Bookings Filter

Use the My Quotes and Bookings filters on the main dashboard to search for references by itinerary status, primary advisor, client or traveler name, quote name, departure date, service type or file update timeframe. Once a filter is applied, the most recent 8 files that apply to that filter will appear in the Quotes and Bookings section of the page.

The screenshot shows the ADX dashboard interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and a Bookings dropdown menu. A search bar contains the text 'Cruise ID, ADX Ref, PNR, or Invoice #' and a user profile 'Anna Kuliej'. Below the navigation are several tool icons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A 'USING ADX AS:' dropdown is set to 'Me'. The main section is titled 'MY QUOTES & BOOKINGS' with a 'VIEW ALL' link. A filter is applied: 'Advisors: Me x'. A 'Clear Filters' button is visible. Below the filter is a table with the following data:

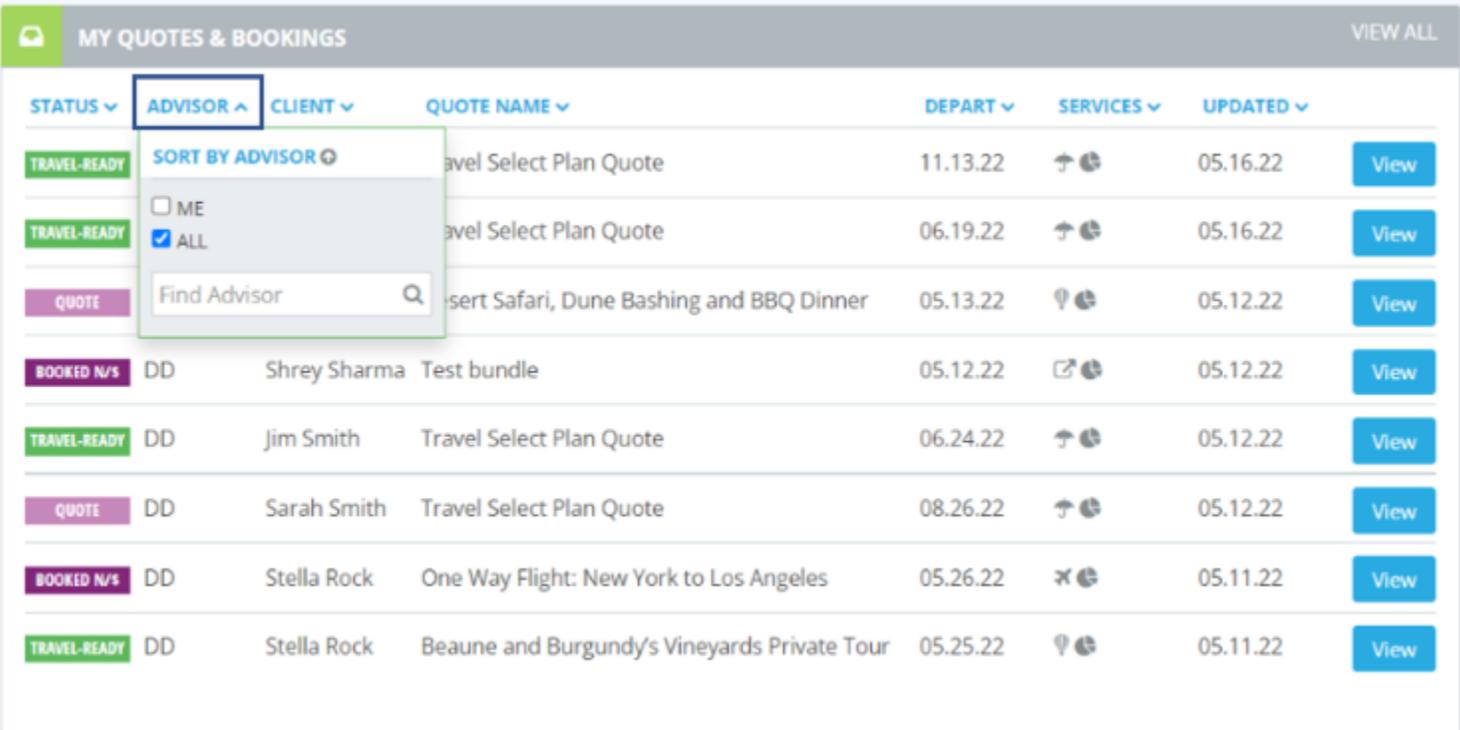
STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22	✈️🌐	05.16.22	<a href="#">View</a>
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22	✈️🌐	05.16.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22	🏨🌐	05.09.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23	🌐	05.09.22	<a href="#">View</a>
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22	🏨🌐	05.06.22	<a href="#">View</a>
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22	🏨🌐	05.04.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22	✈️🌐🏨	05.04.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22	✈️🌐	05.04.22	<a href="#">View</a>

**Status** – Select the status of the full ADX reference and the most recent 8 references under that status. Set the status you want to see by unselecting the undesired options.

The screenshot shows a web interface titled "MY QUOTES & BOOKINGS" with a "VIEW ALL" link in the top right. A table lists various quotes with columns for "STATUS", "ADVISOR", "CLIENT", "QUOTE NAME", "DEPART", "SERVICES", and "UPDATED". A "STATUS" dropdown menu is open, showing a "SORT BY STATUS" section with several checked options: "SELECT ALL", "QUOTE", "PART BOOKED", "BOOKED N/S", "BOOKED W/S", "TRAVEL-READY", "ACTION-REQ", "TRAVELED", and "CLOSED". Below the table, there are three colored filters: "QUOTE" (purple), "BOOKED N/S" (dark purple), and "TRAVEL-READY" (green).

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	View
		Sam Smith	Travel Select Plan Quote	11.13.22		05.16.22	View
		Sam Smith	Travel Select Plan Quote	06.19.22		05.16.22	View
			Desert Safari, Dune Bashing and BBQ Dinner	05.13.22		05.12.22	View
		Shrey Sharma	Test bundle	05.12.22		05.12.22	View
		Jim Smith	Travel Select Plan Quote	06.24.22		05.12.22	View
QUOTE	DD	Sarah Smith	Travel Select Plan Quote	08.26.22		05.12.22	View
BOOKED N/S	DD	Stella Rock	One Way Flight: New York to Los Angeles	05.26.22		05.11.22	View
TRAVEL-READY	DD	Stella Rock	Beaune and Burgundy's Vineyards Private Tour	05.25.22		05.11.22	View

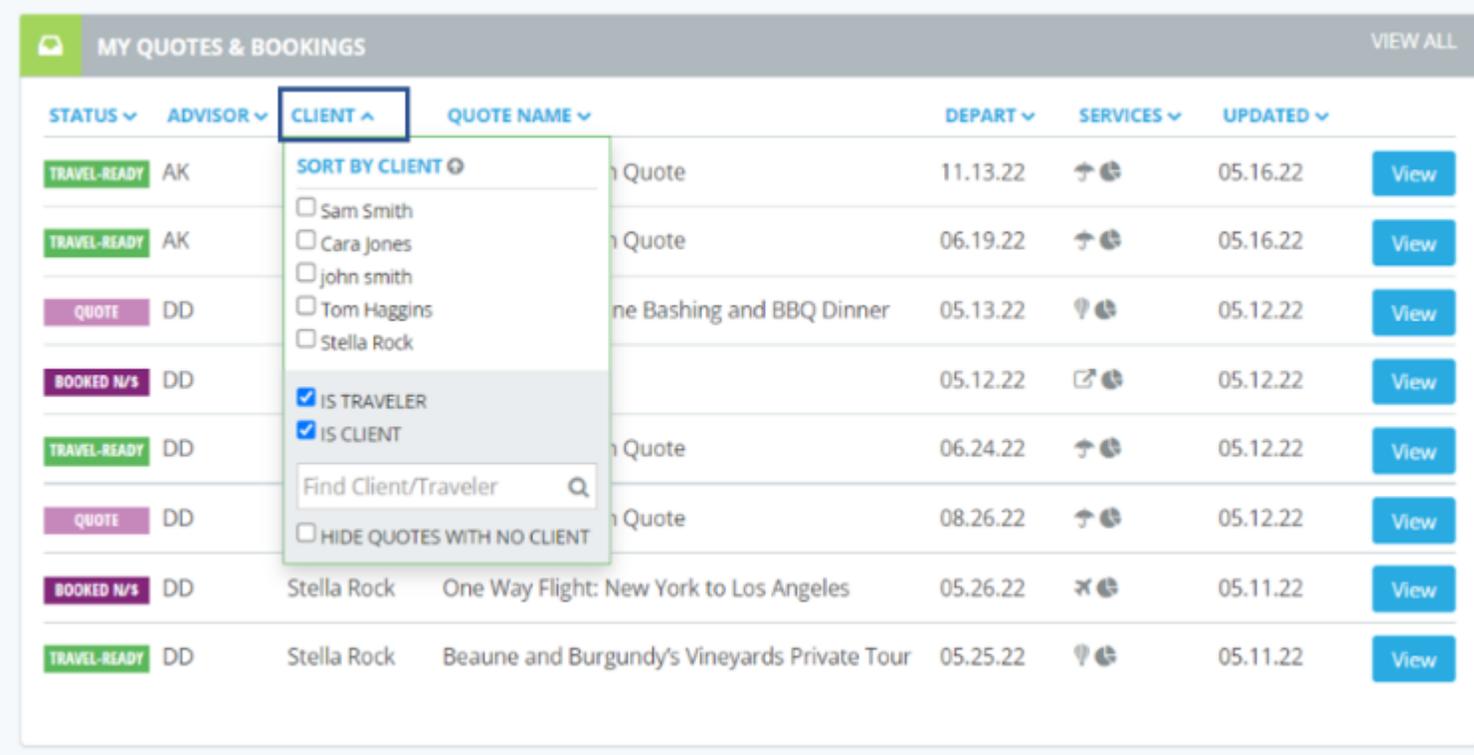
**Advisor** – Change the primary advisor view on the dashboard. You can select ME to only see your own trips, ALL for anyone within your office that has set their permissions to shared. You can also use this field to search for a specific advisor by name.



The screenshot displays a dashboard titled "MY QUOTES & BOOKINGS" with a "VIEW ALL" link in the top right corner. Below the title is a table with columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. The table contains several rows of quote data. A dropdown menu is open for the "ADVISOR" column, showing options "ME" (unchecked) and "ALL" (checked), along with a search box labeled "Find Advisor".

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY			Travel Select Plan Quote	11.13.22	🌍	05.16.22	<a href="#">View</a>
TRAVEL-READY			Travel Select Plan Quote	06.19.22	🌍	05.16.22	<a href="#">View</a>
QUOTE			Desert Safari, Dune Bashing and BBQ Dinner	05.13.22	🌍	05.12.22	<a href="#">View</a>
BOOKED N/S	DD	Shrey Sharma	Test bundle	05.12.22	🌍	05.12.22	<a href="#">View</a>
TRAVEL-READY	DD	Jim Smith	Travel Select Plan Quote	06.24.22	🌍	05.12.22	<a href="#">View</a>
QUOTE	DD	Sarah Smith	Travel Select Plan Quote	08.26.22	🌍	05.12.22	<a href="#">View</a>
BOOKED N/S	DD	Stella Rock	One Way Flight: New York to Los Angeles	05.26.22	✈️	05.11.22	<a href="#">View</a>
TRAVEL-READY	DD	Stella Rock	Beaune and Burgundy's Vineyards Private Tour	05.25.22	🌍	05.11.22	<a href="#">View</a>

**Client** – Search by client or traveler attached to any service on a trip reference. Select from a list of most often used or enter the client or traveler FIRST or LAST name into the search box.



The screenshot shows a web interface titled "MY QUOTES & BOOKINGS" with a "VIEW ALL" link in the top right. The main content is a table with columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. A dropdown menu is open under the "CLIENT" column, showing a list of client names: Sam Smith, Cara Jones, John Smith, Tom Haggins, and Stella Rock. Below the list are two checked options: "IS TRAVELER" and "IS CLIENT". At the bottom of the menu is a search box labeled "Find Client/Traveler" and a checkbox for "HIDE QUOTES WITH NO CLIENT".

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK		Quote	11.13.22		05.16.22	<a href="#">View</a>
TRAVEL-READY	AK		Quote	06.19.22		05.16.22	<a href="#">View</a>
QUOTE	DD		one Bashing and BBQ Dinner	05.13.22		05.12.22	<a href="#">View</a>
BOOKED IV/S	DD			05.12.22		05.12.22	<a href="#">View</a>
TRAVEL-READY	DD		Quote	06.24.22		05.12.22	<a href="#">View</a>
QUOTE	DD		Quote	08.26.22		05.12.22	<a href="#">View</a>
BOOKED IV/S	DD	Stella Rock	One Way Flight: New York to Los Angeles	05.26.22		05.11.22	<a href="#">View</a>
TRAVEL-READY	DD	Stella Rock	Beaune and Burgundy's Vineyards Private Tour	05.25.22		05.11.22	<a href="#">View</a>

**Quote Name** – Search by the name of your quote. The name can be customized on the specific trip reference page and would be reflected on the quotes and bookings section quote name field.

The screenshot shows a web interface titled "MY QUOTES & BOOKINGS" with a "VIEW ALL" link in the top right. Below the title is a table with columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. A dropdown menu is open for the "QUOTE NAME" column, showing "SORT BY QUOTE NAME" and a search input field with the text "Find Quote Name" and a search icon. The table contains eight rows of quote data.

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith		11.13.22	✈️🌐	05.16.22	<a href="#">View</a>
TRAVEL-READY	AK	Sam Smith		06.19.22	✈️🌐	05.16.22	<a href="#">View</a>
QUOTE	DD		Desert Safari, Dune Bashing and BBQ Dinner	05.13.22	🏜️🌐	05.12.22	<a href="#">View</a>
BOOKED N/S	DD	Shrey Sharma	Test bundle	05.12.22	✈️🌐	05.12.22	<a href="#">View</a>
TRAVEL-READY	DD	Jim Smith	Travel Select Plan Quote	06.24.22	✈️🌐	05.12.22	<a href="#">View</a>
QUOTE	DD	Sarah Smith	Travel Select Plan Quote	08.26.22	✈️🌐	05.12.22	<a href="#">View</a>
BOOKED N/S	DD	Stella Rock	One Way Flight: New York to Los Angeles	05.26.22	✈️🌐	05.11.22	<a href="#">View</a>
TRAVEL-READY	DD	Stella Rock	Beaune and Burgundy's Vineyards Private Tour	05.25.22	🏰🌐	05.11.22	<a href="#">View</a>

**Departure Date** – Filter by departure date. This will show most recent 8 references that have a service with a departure that fits into the filter you set. You can enter a specific time frame OR select from next 10 days, 1 month or 3 months.

MY QUOTES & BOOKINGS VIEW ALL

Filters:  
Advisors: Me x Clear Filters

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote			05.16.22	<a href="#">View</a>
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote			05.16.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	St Regis New York - 5 nights			05.09.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	New Trip Planning Quote			05.09.22	<a href="#">View</a>
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights			05.06.22	<a href="#">View</a>
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22		05.04.22	<a href="#">View</a>
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22		05.04.22	<a href="#">View</a>
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22		05.04.22	<a href="#">View</a>

**DEPART** dropdown menu:

- SORT BY DEPARTURE
- Next 10 days
- Next 1 month
- Next 3 months

MM/DD/YYYY

TO

MM/DD/YYYY

**Services** – Filter by the type of service that is on the reference you are searching for. Filtering will show ALL references with that type of service associated on it.

MY QUOTES & BOOKINGS VIEW ALL

Filters: Clear Filters

Advisors: Me ✕

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22			View
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22			View
QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22			View
QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23			View
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22			View
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22		05.04.22	View
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22		05.04.22	View
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22		05.04.22	View

**SERVICES**

SORT BY SERVICES

- SELECT ALL
- AIR
- HOTEL
- CRUISE
- INSURANCE
- EXTERNAL
- SERVICE FEE
- ACTIVITY

**Updated** – See files that were updated within a specific time frame. Add a time frame manually or select from today, last 2 weeks and last month.

The screenshot displays a web interface for managing travel quotes. At the top, there is a header 'MY QUOTES & BOOKINGS' and a 'VIEW ALL' link. Below the header, a 'Filters:' section shows 'Advisors: Me X' and a 'Clear Filters' button. The main content is a table with columns: STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. The 'UPDATED' column is currently open, showing a dropdown menu with options: 'SORT BY UPDATED', 'Today', 'Last 2 weeks', and 'Last month'. There are also date input fields for 'MM/DD/YYYY' and 'TO' with calendar icons. The table contains several rows of quote data, each with a 'View' button.

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22	📄🌐		
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22	📄🌐		
QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22	📄🌐		
QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23	🌐		
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22	📄🌐		
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22	📄🌐	05.04.22	View
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22	✕🌐📄	05.04.22	View
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22	📄🌐	05.04.22	View

### 1.2.3 View All Page

The View All page on the dashboard will house ALL of your quotes and bookings that you have ever done. It is an extended version of the Quotes and Bookings section and will show you a list of everything. You can use the same filters that apply to the Quotes and Bookings section on the View All page.

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

ITINERARY BUILDER AIR HOTEL ACTIVITY INSURANCE CRUISE INVOICE TOOL

USING ADX AS: Me

MY QUOTES & BOOKINGS VIEW ALL

Filters: Advisors: Me x Clear Filters

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22		05.16.22	View
TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22		05.16.22	View
QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22		05.09.22	View
QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23		05.09.22	View
QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22		05.06.22	View
QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22		05.04.22	View
QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22		05.04.22	View
QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22		05.04.22	View

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

« BACK TO DASHBOARD

My Quotes & Bookings

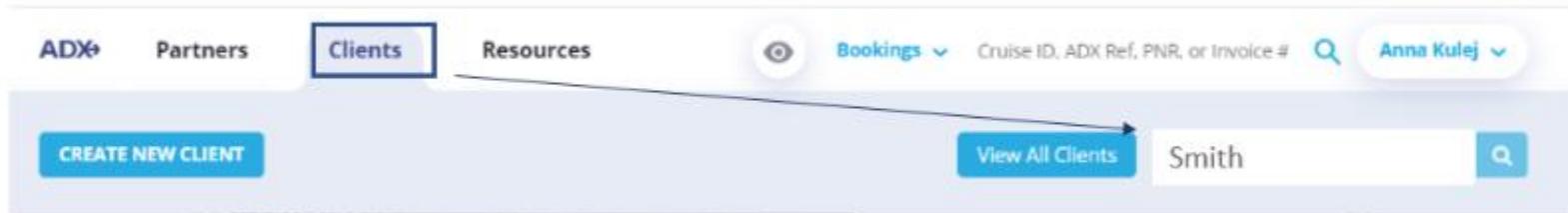
SHOW ARCHIVED QUOTES Results: 1 - 20 of 211 < 1 2 3 4 5 ... > 20

Filters: Advisors: Me x Clear Filters

Archive STATUS ADVISOR CLIENT QUOTE NAME DEPART SERVICES UPDATED

<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	11.13.22		05.16.22	View
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	06.19.22		05.16.22	View
<input type="checkbox"/>	QUOTE	AK	Cara Jones	St Regis New York - 5 nights	06.30.22		05.09.22	View
<input type="checkbox"/>	QUOTE	AK	Sam Smith	New Trip Planning Quote	07.09.23		05.09.22	View
<input type="checkbox"/>	QUOTE	AK		The Pierre - A Taj Hotel - 4 nights	05.26.22		05.06.22	View
<input type="checkbox"/>	QUOTE	AK		Melia Paris Notre Dame - 5 nights	09.11.22		05.04.22	View
<input type="checkbox"/>	QUOTE	AK	Cara Jones	Round Trip Flights: New York - Miami	05.26.22		05.04.22	View
<input type="checkbox"/>	QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	05.31.22		05.04.22	View
<input type="checkbox"/>	QUOTE	AK	Cara Jones	Round Trip Flights: New York - Los Angeles	05.25.22		05.03.22	View
<input type="checkbox"/>	ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	05.11.22		05.02.22	View

**Client Specific Trips** – If a client/traveler has been assigned to a trip reference, you can also find the record of ALL of that client/companion references through the client profile page. You can apply the same filters as used on the Quotes and Bookings section of the dashboard.



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

CREATE NEW CLIENT View All Clients Smith

---

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

### Mr. Sam Smith

23 March 1990, Male | 5554445555

**Client Information**

- Companions
- Additional Details and Preferences
- Loyalty Programs
- Marketing Fields
- Notes

**Client Information** [Edit](#)

NAME	Mr. Sam Smith	INVOICE ADDRESS	123 Sunny Drive San Diego, California United States
BIRTHDAY	23 March 1990	BILLING ADDRESS	Same as Invoice Address
GENDER	Male	UPCOMING TRIP	13 June 2022, 1QJGMF
PHONE	5554445555	LAST TRAVELED	10 April 2022, 51M4NW
ADVISOR	Anna Kulej <small>(PRIMARY)</small>		

**QUOTES & BOOKINGS FOR MR. SAM SMITH**

All Trips Quotes Archived

Archive	Status	Advisor	Client	Quote Name	Depart	Services	Updated	
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	13.11.22	🌐	16.05.22	<a href="#">View</a>
<input type="checkbox"/>	TRAVEL-READY	AK	Sam Smith	Travel Select Plan Quote	19.06.22	🌐	16.05.22	<a href="#">View</a>
<input type="checkbox"/>	QUOTE	AK	Sam Smith	New Trip Planning Quote	09.07.23	🌐	09.05.22	<a href="#">View</a>
<input type="checkbox"/>	QUOTE	AK	Sam Smith	Deluxe Travel Protection Plan Quote	31.05.22	🌐	04.05.22	<a href="#">View</a>
<input type="checkbox"/>	ACTION-REQ	AK	Sam Smith	Courtyard ATL Marietta I-75	11.05.22	🌐	02.05.22	<a href="#">View</a>

Results: 1 - 5 of 81 1 2 3 4 5 5