



Quick Guide –
Copy an Itinerary Quote
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. COPY AN ITINERARY QUOTE

You can copy an entire itinerary quote to create a brand-new reference without having to re-run any of the searches. This is useful when you have two different clients taking the same trip, the itinerary can be built once and copied before it's booked for the second client. The itinerary can ONLY be copied on a Quote status.

The screenshot displays the ADX system interface for a quote. At the top, there are navigation links for ADX, Partners, Clients, and Resources. A search bar contains the text "Bookings" and "Cruise ID, ADX Ref, PNR, or Invoice #". The user's name, "Anna Kulej", is visible in the top right corner.

The main heading is "Round Trip Flights: New York - Miami" with the dates "Thursday, May 26, 2022 - Monday, May 30, 2022". The advisor is listed as "Cara Jones" with the contact "Advisor: Anna Kulej". A "QUOTE" button is present in the top right.

Navigation tabs include "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". A "Refresh Quote" button is also visible.

The "Trip Name" field contains "Round Trip Flights: New York - Miami". The "Dates" field shows "05/26/2022" and "05/30/2022". There is an "Add details/notes" dropdown.

The "All Services" section lists two services:

- Round-Trip New York to Miami** (OFFERED): May 26, 2022 - May 30, 2022. Actions: Select New Flights, Ask Air Support, Seat Plan, Fare Rules. Includes a "Book" button and a "Remove" button.
- Esa Miami Brickell Port** (OFFERED): May 26, 2022 - May 30, 2022. Action: Modify. Includes a "Book" button and a "Remove" button.

At the bottom, there is an "Actions: Reorder Services" section. A green box displays the "Estimated Quote" with a "Potential Commission" of "USD \$39.00" and "USD \$11.00". There is an "Add Insurance" button. Another green box shows "Client Documents: Insurance offered" with an "Update" button.

At the very bottom, there are buttons for "Add ADX Service", "Add non-ADX Service", and "Send Itinerary".

Annotations on the left side of the screenshot:

1. ——— points to the "Copy Quote" link in the quote summary.
2. ——— points to the "Link Bookings" link in the quote summary.

	Steps		Notes
1.	Open the reference	•	
2.	Press COPY QUOTE button	•	<i>Itinerary will refresh</i>

3.

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

Round Trip Flights: New York - Miami v2

Thursday, May 26, 2022 - Monday, May 30, 2022

ADX Ref. 3E2TUL | Archive | Copy Quote | Link Bookings

Cara Jones
Advisor: Anna Kulej

QUOTE

Trip Client & Travelers Payment Service Fees Manage Refresh Quote

Trip Name: Round Trip Flights: New York - Miami v2
Dates: 05/26/2022 05/30/2022
Add details/notes

All Services View by:

- Round-Trip New York to Miami
May 26, 2022 - May 30, 2022
Actions: Select New Flights - Ask Air Support - Seat Plan - Fare Rules
OFFERED Book Remove
- Esa Miami Brickell Port
May 26, 2022 - May 30, 2022
Actions: Modify
OFFERED Book Remove

Actions: Reorder Services

Estimated Quote Potential Commission USD \$39.00 USD \$11.00 Add Insurance

Client Documents: Insurance offered. Update

Add ADX Service - Add non-ADX Service - Send Itinerary

	Steps	 Notes
3.	Open the reference	•