



Quick Guide –
Building Multi Service Itineraries
June 2022

Contents

1. Post Booking Management	3
1.1. BUILDING MULTI SERVICE ITINERARIES	4

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. BUILDING MULTI SERVICE ITINERARIES

ADX is a complex itinerary building tool that lets you combine services sold in ADX with services sold outside of ADX and invoiced using the Invoicing module. By building on one ADX reference, you will produce one robust client itinerary with all the trip details and confirmations in one place and on one file. Once you have added the first service quote to an ADX reference, use the service button on the reference to add the rest of the trip components.

The screenshot displays the ADX interface for building a multi-service itinerary. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar for Cruise ID, ADX Ref, PNR, or Invoice #. The user's name, Anna Kulej, is shown in the top right.

The main section is titled "Round Trip Flights: New York" with dates "Thursday, May 26, 2022 - Monday, May 30, 2022". The advisor is listed as "Cara Jones" and "Advisor: Anna Kulej". A "Print" button is visible. A link "1." points to the "ADX Ref. 3E2TUL" with options for "Archive", "Copy Quote", and "Link Bookings".

Below this, there are tabs for "Trip", "Client & Travelers", "Payment", "Service Fees", and "Manage". A "Refresh Quote" button is also present.

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

The "All Services" section shows a list of services. The first service is "Round-Trip New York to Miami" with dates "May 26, 2022 - May 30, 2022". It has a "Book" button and a "Remove" button. "Actions" for this service include "Select New Flights", "Ask Air Support", "Seat Plan", and "Fare Rules".

Below the services list, there is an "Actions: Reorder Services" button.

The "Estimated Quote" section shows a total of "USD \$39.00" and a "Potential Commission" of "USD \$11.00". A dropdown menu is open, listing various services: Air, Hotel, Insurance, Activity, Cruise, Planning Fee, Hotel, Tour, Cruise, Transportation, Car Rental, Rail, Insurance, Misc, Misc - Air, and Non-Invoice Service.

The "Client Documents" section shows "Insurance offered." and an "Update" button.

At the bottom, there are three buttons: "Add ADX Service +", "Add non-ADX Service +", and "Send Itinerary". A link "2." points to the "Add ADX Service +" button.

	Steps		Notes
1.	Create an ADX reference		<ul style="list-style-type: none"> • <i>Create a quote using the module buttons</i>
2.	Press ADD SERVICES button		<ul style="list-style-type: none"> • <i>ADX Services are bookable in ADX and include air, hotel, insurance, activity, panning fees</i> • <i>Non ADX services will let you add non ADX bookings via the Invoicing module</i> • <i>Work through quote flow for ADX services OR complete the invoicing page</i>

Round Trip Flights: New York Cara Jones
Advisor: Anna Kulej

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

ADX Ref. 3E2TUL | [Archive](#) | [Copy Quote](#) | [Link Bookings](#) QUOTE

Trip **Client & Travelers** Payment Service Fees Manage Refresh Quote

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

All Services View by:

Round-Trip New York to Miami [Rename](#) OFFERED v

May 26, 2022 - May 30, 2022 Book

Actions: [Select New Flights](#) · [Ask Air Support](#) · [Seat Plan](#) · [Fare Rules](#) Remove

Key West Tour [Rename](#) OFFERED v

May 27, 2022 Book

Actions: [Modify](#) 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](#)

3.

4.

	Steps	Notes
3.	Confirm service was added	<ul style="list-style-type: none"> Once you complete the quote/book flow the service tile will appear under the trip tab
4.	Press ADD SERVICES button – as required	<ul style="list-style-type: none"> Continue to add ADX and non ADX services as required