

Quick Guide – Archiving Full Itineraries

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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. ARCHIVING FULL ITINERARIES

ADX does not delete references once they have been completed or the date has passed. Itineraries can be **archived or hidden** from view and accessed in the future. Archiving can be done from two places:

- the Trip Services reference
- View All page on the main dashboard

### 1.3.1 Archive from Trip Services Reference

| An i | tinerary can '    |   |   | . Bookings section as well as |
|------|-------------------|---|---|-------------------------------|
| the  | View All pag      | ADX+ Partners Clients Resources    Bookings   Cru   | ise ID, ADX Ref, PNR, or Invoice # Q Anna Kulej 🗸 |                               |
|      |                   | Deluxe Travel Protection Plan Quote<br>Tuesday, May 31, 2022 - Friday, June 17, 2022                    | Sam Smith<br>Advisor: Anna Kulej                  |                               |
|      | 1                 | ADX Ref. 2KB5HP [ Archive ] & Link Bookings   | quant   | 2.                            |
|      |                   | Trip Client & Travelers Payment Service Fees Manage   | C Refresh Quote                                   |                               |
|      |                   | Trip Name         Dates           Deluxe Travel Protection Plan Quote         05/31/2022         06/17/ | 2022 🗂 Add details/notes 🛩                        |                               |
|      |                   | All Services  | View by: 📋 👱                                      |                               |
|      |                   | Deluxe Travel Protection Plan      Rename May 31, 2022 - Jun 17, 2022                                   | Book  |                               |
|      |                   | Actions: Modify   | @ Remove  |                               |
|      |                   | Actions: Reorder Services   |   |                               |
|      |                   | Client Documents:<br>Insurance offered<br>Update  |   |                               |
|      |                   |   |   |                               |
|      |                   | Add ADX Service  Add non-ADX Service  | Send Itinerary                                    |                               |
| ¥≡   | Steps             |   | Notes   |                               |
| 1.   | Open the referenc | e   | •   |                               |
| 2.   | Press ARCHIVE but | ton   | •   |                               |

|      | Trip                   | Client & Travelers Payment                            | Service Fees Manage  | C Refresh Quote                        |
|------|------------------------|---|--|--|
|      | Trip Name<br>Deluxe Tr | avel Protection Plan Quote                            | Dates 05/31/2022   | Add details/notes V                    |
|      | All Service            |   |  | y: 🖮 🗡                                 |
|      | 🗢 Delux<br>May 3       | Are you sure you wish to archiv<br>quotes, and bookir | Archive Quote<br>e this quote? To retrieve an archived itinerary ch<br>ngs and click "Show Archived Quotes". Click Yes t | oose "View All" on your<br>to proceed. |
| 3. — | Actio                  |   | NoYes  | nove                                   |
|      | Actions:               | Reorder Services                                      |  |  |

| **=<br> | Steps                |   | Notes   |
|---------|----------------------|---|---|
| 3.      | Press YES to archive | • | Press no to cancel archive request<br>Pressing YES will archive the reference |

#### 1.3.2 Archive from the View All Page

The View All page will show you ALL of your quotes and bookings on one page. You can batch archive references by selecting the checkboxes next to the reference and pressing the archive button.



| ¥<br>₹ | Steps          |   | Notes                             |
|--------|----------------|---|-----------------------------------|
| 1.     | Press VEIW ALL | • | Located in My Quotes and Bookings |