



Quick Guide –
Itinerary Notes
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. ITINERARY NOTES

The Advisor notes section is a private note block that is advisor facing only, these do NOT show on the client itinerary. Use this to make notes on the trip for future reference.



The screenshot shows the ADX booking interface for a Round Trip Flight to New York. The page includes a top navigation bar with links for Partners, Clients, and Resources, and a search bar for Bookings. The main header displays the trip name, dates, and the advisor's name, Anna Kulej. Below the header, there are tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. The Trip tab is active, showing a form for trip details. The form includes fields for Trip Name, Dates, Description, and Advisor Background, each with a 1300 character limit. There are also sections for Upload Attachments and Upload Cover Image, both with a 4MB limit. At the bottom, there is a section for Advisor-only Notes, which is highlighted by a blue box and labeled with a number 3. The page also features a Cancel button and a Save changes button. A checkbox for Hide Cancelled Services is located at the bottom left.

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

2. Trip Name: Round Trip Flights: New York | Dates: 05/26/2022 - 05/30/2022 | [Add details/notes](#)

3. Advisor-only Notes

4. ☐ Hide Cancelled Services

	Steps		Notes
1.	Open ADX reference	•	
2.	Press v on Add Details/Notes	•	<ul style="list-style-type: none"> Expand details by pressing the v button Details will expand down
3.	Add notes to Advisor-only Notes	•	
4.	Press SAVE CHANGES	•	Notes will show every time you access the reference

