



Quick Guide –
Creating Notifications
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. CREATING NOTIFICATIONS

There is a lot to remember when crafting multi service trips for your clients. Set up reminders to get sent to you via email with important reminders and action items. You set the date to receive the email as well as the notification text to show in the email. Reminders can be set a:

- Generic reminders from the dashboard
- Specific trip reminders from the trip reference

 **CREATE NOTIFICATION** ✕

NOTIFICATION DATE: 08/16/2022  PRIORITY: Standard 

NOTIFICATION TEXT: REMINDER: Send out summer emails!

 **CREATE NOTIFICATION** ✕

NOTIFICATION DATE: 05/29/2022  PRIORITY: Standard  **ADX Ref. 3E2TUL**

NOTIFICATION TEXT: Follow up RE Cruise deposit

1.5.1 From the Dashboard

Notifications created from the dashboard are generic in nature and are not linked with an ADX reference. They will ONLY appear on the notice board dashboard and will not show on a trip reference page.

The dashboard features a top navigation bar with 'ADX', 'Partners', 'Clients', and 'Resources'. A 'Bookings' dropdown menu is active, showing search criteria: 'Cruise ID, ADX Ref, PNR, or Invoice #' and the user 'Anna Kulej'. Below the navigation are icons for 'ITINERARY BUILDER', 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. A 'USING ADX AS: Multiple Agents' dropdown is present. The main content area is divided into two sections: 'MY QUOTES & BOOKINGS' and 'CLIENTS TRAVELING IN THE NEXT 10 DAYS'. The 'MY QUOTES & BOOKINGS' section contains a table with columns for STATUS, ADVISOR, CLIENT, QUOTE NAME, DEPART, SERVICES, and UPDATED. The 'CLIENTS TRAVELING IN THE NEXT 10 DAYS' section shows 'No clients traveling in the next 10 days'. A 'NOTICE BOARD' section is visible at the bottom right, containing a 'Create' button and a list of notices for Christopher Sherman, David Thorne, and another David Thorne.

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
0001	DA		Multi-City Flight: Los Angeles - Frankfurt-am-M...	07.14.22	X	05.31.22	View
0001	AK	Julie Jones	Park Hyatt New York - 1 nights	05.31.22	im	05.31.22	View
0001	DA	Mike Jones II	Four Seasons New York Downtown - 1 nights	05.31.22	im	05.31.22	View
0001	NR		Uber Boat by Thames Clippers - River Roamer Ca...	06.01.22	im	05.30.22	View
PART BOOKED	DV	David Volman	Riviera	08.17.22	im	05.30.22	View
0001	NR		One Way Flight: Toronto to Xianyang	07.27.22	X	05.27.22	View
0001	AK		Round Trip Flights: Los Angeles - New York	09.18.22	X im	05.27.22	View
0001	AK		Multiple Hotel Services	07.17.22	im	05.27.22	View

The 'CREATE NOTIFICATION' modal form includes a 'NOTIFICATION DATE' field with the value '08/16/2022' and a calendar icon, and a 'PRIORITY' dropdown menu set to 'Standard'. The 'NOTIFICATION TEXT' field contains the text 'REMINDER: Send out summer emails!'. At the bottom right, there are 'Cancel' and 'Create' buttons.

1.5.2 From the Trip Reference

Notifications created from a specific trip reference links the ADX ref to that notification. The create notification option is available from the MANAGE tab of each trip reference.

The screenshot shows the ADX system interface for a trip reference. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains 'Anna Kulej'. The main header displays 'Jones New York Business Trip' with dates 'Monday, June 20, 2022 - Tuesday, June 21, 2022' and 'Sarah Smith, Advisor: Anna Kulej'. Below this, there are tabs for 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Manage' tab is active, and a 'Create Notification' button is highlighted with a red box. Below the tabs, there is a 'Notifications' section with the text 'There are no notifications to display.' and a 'Sent Emails' table. The table has columns for 'Date Sent', 'Email Type', 'Attachments', and 'Recipients'. A 'Bon Voyage & Welcome Home Email Messages' section is also visible, with a 'Preview' section at the bottom showing a 'BON VOYAGE' graphic and a text editor.

The screenshot shows the 'CREATE NOTIFICATION' modal window. It has a title bar with a bell icon and the text 'CREATE NOTIFICATION'. The modal contains the following fields: 'NOTIFICATION DATE' with a date picker set to '05/29/2022', 'PRIORITY' with a dropdown menu set to 'Standard', and 'ADX Ref. 3E2TUL'. Below these is a 'NOTIFICATION TEXT' field with the text 'Follow up RE Cruise deposit'. At the bottom right, there are 'Cancel' and 'Create' buttons.