



Quick Guide –  
Service Fees  
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. SERVICE FEES

Services fees can be added to any ADX reference and charged to your client at any point in your quote to book process. Service fees are visible to your client on their credit card statement as well as on the client document as a line item on the itinerary. Fees can be set up through the advisor profile to default how they are used - always added vs. setting suggested fees. Fees can also be set up on the fly, on each individual itinerary. Adding and managing fees can be done through the Service Fees tab on the trip reference page<sup>1</sup>.

The screenshot shows a web interface for managing service fees. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar. The main header displays 'Round Trip Flights: New York' with dates 'Thursday, May 26, 2022 - Monday, May 30, 2022' and advisor information 'Cara Jones, Advisor: Anna Kulej'. Below this is a navigation bar with tabs: Trip, Client & Travelers, Payment, Service Fees (active), and Manage. A 'Refresh Quote' button is also present.

The 'Service Fees' section is divided into two panels:

- ADD A PLANNING FEE:** This panel includes a toggle for 'Active' (currently on). It shows a notification: 'You have added Ticketing Fee to a single itinerary in the amount of USD 5100.00.' Below this, there is a form with fields for 'FEE NAME' (Ticketing Fee), 'CURRENCY' (USD), 'FLAT RATE\*' (100), and 'PERCENTAGE\*'. A text area for 'DESCRIBE THE SERVICE YOU WILL PROVIDE' contains 'One time ticketing fee'. At the bottom, there are 'Cancel' and 'Save Fee' buttons, and a checkbox for 'Create a new Planning Fee'.
- FEE TYPES:** This panel lists various fee types with 'Select' buttons: Planning Fee (1 added, Selected), Change Fee, 24/7 Support Fee (1 added), and Custom Fee. It also includes checkboxes for 'SEND PLANNING FEE AGREEMENT' and 'VIEW TE SUGGESTED FEES'.

At the bottom of the interface, there are buttons for 'Add ADX Service -', 'Add non-ADX Service -', 'Compare Services -', and 'Send Itinerary'.

<sup>1</sup> Fees are subject to commission split and 3.5% merchant fee

### 1.2.1 Customize Fee Defaults

Service fee defaults can be created through the profile and accessed on the trip service page. Fees can be created as:

- Planning fees
- Change fees
- Custom Fees

The screenshot shows the ADX user profile settings page. The navigation bar at the top includes 'ADM', 'Partners', 'Clients', 'Resources', 'Bookings', and 'Annals'. A dropdown menu for 'Annals' is open, showing 'My Profile', 'Reports', and 'Log out'. The main content area has a welcome message and four tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Set Preferences' section is expanded, showing a list of settings with dropdown menus: 'Air Search Inventory (GDS) Preference' (All), 'Commission Display' (On), 'Files to show upon login ("Using ADX As" field)' (Mine Only), 'Default Client Pay selection (when available)' (On), 'Default Currency' (USD), 'Client Itinerary View Quote Preference', 'Client Itinerary Canceled Services Visibility' (Show by Default), 'Air Search Filters' (No Filter Applied), and 'Hide Agent Profile in Client Itinerary' (No). A 'Save Preferences' button is at the bottom of this section. Below this is the 'Customize your service fee defaults' section, which includes a description and a list of existing fees: 'Planning Fee' (added to all itineraries for \$100 USD) and 'Change Fee' (for post-booking services).

1. ADM Partners Clients Resources Bookings Annals

2. Welcome Annal Use the following tiles to update any aspect of your ADX profile.

3. Communication Profile  
Control the appearance and contents of emails and documents.

Access Sharing  
Share access to your bookings with other ADM users.

Set Preferences  
Customize default values for certain fields within ADX.

Change Password  
Change your password at anytime to ensure your account is secure.

My Profile  
Reports  
Log out

Set Preferences

Customize your default values for certain fields within ADX.

Air Search Inventory (GDS) Preference All

Commission Display On

Files to show upon login ("Using ADX As" field) Mine Only

Default Client Pay selection (when available) On

Default Currency USD

Client Itinerary View Quote Preference

Client Itinerary Canceled Services Visibility Show by Default

Air Search Filters No Filter Applied

Hide Agent Profile in Client Itinerary No

Save Preferences

4. Customize your service fee defaults

You can set-up default service fees that will appear in all new itineraries you will create. These settings will only apply to new itineraries and it does not apply to existing itineraries, especially itineraries that have already been sent or paid by your clients.

Service Transaction Fees

Planning Fee  
You have added **Planning fee test** to all **itineraries** in the amount of **\$100 USD**

Create a New Planning Fee

Change Fee  
You do provide post booking service to your client. Add a value for this work - charge a change fee to change travel dates of booked flight or to add room in already booked hotel.

	<b>Steps</b>		<b>Notes</b>
1.	Click v next to name		<ul style="list-style-type: none"> <li>• <i>Name located top right corner</i></li> </ul>
2.	Press MY PROFILE		<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press SET PREFERENCES		<ul style="list-style-type: none"> <li>•</li> </ul>
4.	Scroll down to Customize your Service Fee Defaults section		<ul style="list-style-type: none"> <li>•</li> </ul>

Air Search Filters No Filter Applied  
Hide Agent Profile in Client Itinerary No

Save Preferences

Customize your service fee defaults

You can set-up default service fees that will appear in all new itineraries you will create. These settings will only apply to new itineraries and it does not apply to existing itineraries, especially itineraries that have already been sent or paid by your clients.

Service Transaction Fees

**1.** Planning Fee  
You do great work for your clients. Put a value on that work - create an up-front planning fee to recover the cost of your time/effort in quoting and booking this trip.

**2.** Change Fee  
You do provide post booking service to your client. Add a value for this work - charge a change fee to change travel dates of booked flight or to add room in already booked hotel.

**6.** Your agency suggested fee is USD \$25.00 [View TE suggested fees](#)

**7.** Fee name Currency Flat Rate\* Percentage\*  
Name \$USD \$ or %

**8.** Describe the Service you will provide  
Service description

**9.** How to use this fee  
I'd like this fee to be added to all itineraries automatically  
\*Based on client location displayed on all itineraries as suggested

**10.** Cancel Save

	Steps		Notes
5.	Open fee type by clicking > button		<ul style="list-style-type: none"> <li>• <i>Select from</i> <ul style="list-style-type: none"> <li>○ <i>Planning fee</i></li> <li>○ <i>Change fee</i></li> <li>○ <i>Custom fee – name it what you like</i></li> </ul> </li> </ul>
6.	Review the TE suggested fee structure		<ul style="list-style-type: none"> <li>• <i>A suggested fee may be set by your office manager</i></li> </ul>
7.	Fill in the fee details		<ul style="list-style-type: none"> <li>• <i>Fee name – Will show up on the client document</i></li> <li>• <i>Currency – US, CAD, BMD<sup>2</sup></i></li> <li>• <i>Flat rate OR Percentage – Charge a flat fee or % of the entire trip and all the services added to one reference</i></li> <li>• <i>Describe the service – Notes that will show up with the fee name</i></li> </ul>
8.	Add fee description		<ul style="list-style-type: none"> <li>• <i>Optional</i></li> <li>• <i>Will appear on the client itinerary</i></li> </ul>
9.	Select how to use the fee		<ul style="list-style-type: none"> <li>• <i>Added to all itineraries automatically – the fee will default to ON and will show on client documents and payment page automatically</i></li> <li>• <i>As Suggested – the fee will default to OFF and will not appear on client documents or payment page until you turn it ON to make it visible</i></li> </ul>
10.	Press SAVE		<ul style="list-style-type: none"> <li>• <i>Repeat the steps to create multiple fees</i></li> </ul>

### 1.2.2 Managing Fees on Trip Reference

Fees can be managed directly on each trip reference under the service fees tab.

- Fees that are defaulted to always be added will show automatically as active.
- Fees defaulted to suggested will show and have the option of being added to the reference
- Create new fees to be added ONLY to a specific reference

Service fee tab

**Suggested default** fees will have the option of being ADDED

**Auto added fees** can be removed by setting to inactive

Fee Type Menu

# of fees set as default

Expand to manage defaults

Travel Edge suggested fee structure

The screenshot shows the ADX interface for a flight from Los Angeles to London. The 'Service Fees' tab is selected, showing two sections: 'ADD A PLANNING FEE' and 'FEE TYPES'. The 'ADD A PLANNING FEE' section has two entries: 'Suggested Planning Fee' (with an 'Add' button) and 'Automatically Added fee' (with a toggle switch set to 'Active'). The 'FEE TYPES' section lists 'Planning Fee' (2 added, 'Selected' button), 'Change Fee' (1 added, 'Select' button), '24/7 Support Fee' (1 added, 'Select' button), and 'Custom Fee' (1 added, 'Select' button). A 'VIEW TE SUGGESTED FEES' link is at the bottom of the 'FEE TYPES' section. Navigation buttons at the bottom include 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

### 1.2.3 Processing Fees

Fees can be processed at any point in the quote, book, pay flow. Once a client is added to the profile, the payment tab will show a PAYMENT button next to the active fees on the service tab. Fees not set to active can also be added through the payment tab. Fees can be processed on their own OR with other services.

The screenshot displays the ADX interface for a flight quote. At the top, there is a navigation bar with 'Partners', 'Clients', and 'Resources' tabs. A search bar contains 'Bookings' and a search icon. The user's name 'Anna Kulej' is visible in the top right. The main header shows the flight details: 'One Way Flight: Los Angeles to London' for 'sam smith' on 'Sunday, July 17, 2022 - Monday, July 18, 2022'. Below this is a 'QUOTE' button and a 'Refresh Quote' button.

The interface features a tabbed menu with 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Service Fees' tab is active, showing a 'COST SUMMARY' table. This table lists various services with their respective costs and commission. The 'Suggested Planning Fee' and 'Automatically Added fee' rows have 'Add' and 'Payment' buttons respectively, which are highlighted by callout 3 and 4. Below the cost summary is a 'PAYMENT SUMMARY' table showing the total amount owing of USD \$160.00. At the bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

Travel Service	Est. Commission	Taxes	Cost	
One-way Los Angeles to London <a href="#">See Details</a>	USD \$0.00	USD \$234.30	USD \$872.30 UPDATE PRICE	<a href="#">Book</a>
Suggested Planning Fee		USD \$0.00	USD \$50.00	<a href="#">Add</a>
24/7 Support		USD \$0.00	USD \$60.00	<a href="#">Payment</a>
Automatically Added fee		USD \$0.00	USD \$100.00	<a href="#">Payment</a>
<b>Total</b>	<b>USD \$210.00</b>	<b>USD \$234.30</b>	<b>USD \$1,082.30</b>	

  

Service	FOPs	Type	Due	Amount
24/7 Support		Balance		USD \$60.00
Automatically Added fee		Balance		USD \$100.00
<b>Total Owning</b>				<b>USD \$160.00</b>

	Steps		Notes
1.	Add client and travelers		<ul style="list-style-type: none"> <li>• <i>Add client and traveler info on Client and Travelers tab</i></li> <li>• <i>Client MUST be added before you can process payment for fees</i></li> </ul>
2.	Press PAYMENT tab		<ul style="list-style-type: none"> <li>•</li> </ul>
3.	Press ADD button to suggested – as needed		<ul style="list-style-type: none"> <li>• <i>Fees suggested not added to itinerary</i></li> <li>• <i>Fees that do not show PAYMNET button are not added on itinerary</i></li> </ul>
4.	Press PAYMENT button		<ul style="list-style-type: none"> <li>• <i>Proceed to payment page to process payment</i></li> </ul>

### 1.2.4 Adding Fees on Payment Page

If you forget to build out your fee on the trip page before starting the payment process, do not worry... you can add the fee on the payment page! The fee will be added to the payment process as well as saved on the service fee tab once it's paid.

The screenshot shows the ADX interface for a flight booking. At the top, there are navigation links for Partners, Clients, and Resources. A search bar contains 'Bookings' and a search icon. The user's name 'Anna Kulej' is displayed in the top right. The main heading is 'One Way Flight: Los Angeles to Paris' with the dates 'Sunday, August 14, 2022 - Monday, August 15, 2022'. The advisor is 'Sam Smith' and the advisor's name is 'Anna Kulej'. The ADX reference is '7IX73F' with links for 'Archive' and 'Link Bookings'. A 'QUOTE' button is visible. Below the header, there are tabs for 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. A 'Refresh Quote' button is also present. The 'COST SUMMARY' section is highlighted in green. It contains a table with columns for 'Travel Service', 'Est. Commission', 'Taxes', and 'Cost'. The table lists four items: 'One-way Los Angeles to Paris', '24/7 Support Fee', 'Ticketing fee', and another 'Ticketing fee'. The total cost is 'USD \$1,174.80'.

Travel Service	Est. Commission	Taxes	Cost	
One-way Los Angeles to Paris <a href="#">See Details</a>	USD \$0.00	USD \$229.80	USD \$1,014.80 <a href="#">UPDATE PRICE</a>	<a href="#">Book</a>
24/7 Support Fee		USD \$0.00	USD \$60.00	<a href="#">Payment</a>
Ticketing fee			USD \$100.00	<b>CANCELLED</b>
Ticketing fee		USD \$0.00	USD \$100.00	<a href="#">Payment</a>
<b>Total</b>	<b>USD \$160.00</b>	<b>USD \$229.80</b>	<b>USD \$1,174.80</b>	

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

### One Way Flight: Los Angeles to London

Sunday, July 17, 2022 - Monday, July 18, 2022 sam smith  
Advisor: Anna Kulej

ADX Ref: 100ONE [Redeem]

**1.** [Add Payment Method](#)

SERVICES READY TO BE PAID	COST
<input type="checkbox"/> 24/7 Support	USD \$60.00
<input type="checkbox"/> Automatically Added fee <small>Fee is non-refundable</small>	USD \$100.00 <a href="#">Edit</a>
<input checked="" type="checkbox"/> One-way Los Angeles to London <small>Jul 17, 2022 - Jul 18, 2022</small>	USD \$872.30 <a href="#">Split Payment</a>
<a href="#">Add a service fee</a>	<b>Total to be paid: USD \$872.30</b>

SERVICES REQUIRING ACTION	COST
<input type="checkbox"/> Nomad Hotel London <small>Jul 17, 2022 - Jul 18, 2022</small>	GBP £585.00 <a href="#">Make Payable</a>
Suggested Planning Fee	USD \$50.00 <a href="#">Add Fee</a>
<b>Outstanding balance:</b>	GBP £585.00 USD \$50.00

**2.** **ADD SERVICE FEES**

**3.** **ADD A PLANNING FEE**

You do great work for your clients. Put a value on that work - create an up-front planning fee to recover the cost of your time/effort in quoting and booking this trip.

FEE NAME	CURRENCY	FLAT RATE*	PERCENTAGE*
<input type="text" value="Name"/>	<input type="text" value="USD"/>	<input type="text" value="\$"/> or <input type="text" value=""/>	<input type="text" value=""/>

DESCRIBE THE SERVICE YOU WILL PROVIDE

I'd like this fee to be

\*Based on client location, applicable taxes will be calculated.

**4.** [Cancel](#) [Add Fee](#)

SERVICES REQUIRING ACTION	COST
<input type="checkbox"/> Nomad Hotel London <small>Jul 17, 2022 - Jul 18, 2022</small>	GBP £585.00 <a href="#">Make Payable</a>

**FEE TYPES**

- Planning Fee [Add](#)
- Change Fee [Add](#)
- Custom Fee [Add](#)

	Steps		Notes
1.	Press ADD A SERVICE FEE button		<ul style="list-style-type: none"> <li>• <i>Located in Services Ready to be Paid section</i></li> </ul>
2.	Press ADD on fee type		<ul style="list-style-type: none"> <li>• <i>Select fee type to be added</i></li> </ul>
3.	Enter fee details		<ul style="list-style-type: none"> <li>•</li> </ul>
4.	Press ADD FEE		<ul style="list-style-type: none"> <li>• <i>Fee will be added to services ready to be paid</i></li> <li>• <i>Fee will be added to payment process</i></li> </ul>

### 1.2.5 Cancelling a Service Fee

In the event a service fee has been paid and needs to be cancelled, the cancellation request must be done from the ADX system on the payment page. Please note if you cancel all other services on the itinerary, the fee charge will NOT automatically be cancelled along with the services. Fee reversal requests will ALWAYS be submitted independent of any other service. The cancellation request will be submitted to the finance team who will process the refund. Questions around timelines of refund please contact the finance team directly.

The screenshot displays the ADX system interface for a flight booking. The main page shows a 'One Way Flight: Los Angeles to Paris' for August 14-15, 2022, with an ADX Ref. of 70K73F. A 'COST SUMMARY' table lists services and their costs. A modal window titled 'CANCEL TICKETING FEE' is open, prompting the user to add remarks for cancellation. The modal contains a text area with the text 'Please cancel this fee. Client not traveling.' and 'Cancel' and 'Continue' buttons.

1. ADX Ref. 70K73F | Archive | Link Bookings

2. Trip Client & Travelers Payment Service Fees Manage

Travel Service	Est. Commission	Taxes	Cost	
One-way Los Angeles to Paris	USD \$0.00	USD \$229.80	USD \$1,014.80	Book
24/7 Support Fee		USD \$0.00	USD \$60.00	Payment
Ticketing fee		USD \$0.00	USD \$100.00	PAID
Ticketing fee		USD \$0.00	USD \$100.00	Payment
<b>Total</b>	<b>USD \$260.00</b>	<b>USD \$229.80</b>	<b>USD \$1,274.80</b>	

3. Ticketing fee CANCEL

4. CANCEL TICKETING FEE

Please add remarks with the reason for cancellation below. Your request will be processed by the Finance Team. Once the process is complete, you will see a message in your notifications list.

REMARKS

Please cancel this fee. Client not traveling.

5. Cancel Continue

	Steps		Notes
1.	Open ADX reference	•	
2.	Press PAYMENT tab	•	
3.	Press CANCEL button	•	<ul style="list-style-type: none"> <li>• <i>Located in Cost Summary section on PAID fees</i></li> <li>• <i>A ticket form will open</i></li> </ul>
4.	Add cancellation details for finance team	•	
5.	Press CONTINUE	•	<ul style="list-style-type: none"> <li>• <i>Will submit request to finance</i></li> <li>• <i>The fee will show CANCELLED</i></li> <li>• <i>Invoice section will show a REFUND invoice for amount of fee cancelled</i></li> </ul>