



Quick Guide –
Client Pay
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. CLIENT PAY

ADX gives your client the freedom to process their own transactions by sending them a **secure client payment link** on the client itinerary document for all bookings and fees¹. ADX will send notifications of any action taken by the client and update the status of the service accordingly. The client payment link can be defaulted on or off through the advisor profile, can be set for a period of time with an expiry window, and will be added to the client document for ease of use.

The client pay link is available for the following modules:

The client pay link is available for the following modules:

- Air
- Hotel
- Activities
- Insurance
- Merchant of Record invoicing
- Service Fees
- 247 VIP Support Plan

Multiple Hotel Services

for Miss Sarah Smith

Multiple Hotel Services

Itinerary Status **QUOTE**

Sunday, July 17, 2022 – Monday, July 18, 2022

For Miss Sarah Smith

Pay for your services at our secure payment gateway with a credit card.
The payment link is valid until 07/17/2022 05:00 AM, Eastern Standard Time

PAY NOW

DATE	TIME		EVENT	DESCRIPTION
JUL 17			Check-in: Park Hyatt New York	Address: 153 West 57th St, New York 10019 United States
JUL 18			Check-out: Park Hyatt New York	Address: 153 West 57th St, New York 10019 United States



INSURANCE

Speak to your advisor about the benefits of purchasing travel insurance today



VIP SUPPORT

24/7 Access
Toll-Free (North America): 1 (888) 481-2064
Global: 1-(647) 288-3069



Anna Kulej

Anna's Travel
Anna.Kulej@worldviewtravel.com
555-444-5666

¹ Services must be in payable status and qualify for client pay link

1.2.1 Applicable Services

The client pay option will be available through the client itinerary on applicable services and PAYABLE services meaning they qualify for payment and confirmation. Each service type differs on how to achieve the payable status, but all must have a client and traveler assigned to the service.

10.18.1.1 Air Service

Air must be in a BOOKED status meaning inventory must be held and next step is to apply payment. You cannot apply the Client Pay Link on quoted air options.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ BOOKED status
 - No client/traveler assigned
 - Quoted service

The screenshot displays the ADX system interface for a flight booking. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources', along with a search bar containing 'Anna Kulej'. The main heading is 'One Way Flight: Los Angeles to New York' with dates 'Sunday, November 20, 2022 - Monday, November 21, 2022'. The advisor is 'Sarah Smith' and the status is 'BOOKED N/S'. Below this, there are tabs for 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Trip Name' is 'One Way Flight: Los Angeles to New York' and the dates are '11/20/2022' and '11/21/2022'. Under 'All Services', there is a list of services with 'One-way Los Angeles to New York' selected, showing dates 'Nov 20, 2022 - Nov 21, 2022' and a 'Ticket Flight' button. At the bottom, there are sections for 'Estimated Quote' (USD \$47.00 Potential Commission) and 'Client Documents' (Insurance offered and declined). Navigation buttons at the bottom include 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

10.18.1.2 Hotel Service

Hotel, both EDGE and standard, must be in a QUOTED status with client and traveler added. You cannot apply the Client Pay Link before a client and traveler is added to the service.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ QUOTED status
 - No client/traveler assigned

The screenshot displays the ADX system interface for a hotel booking. At the top, there are navigation links for ADX, Partners, Clients, and Resources. A search bar contains the text 'Cruise ID, ADX Ref, PNR, or Invoice #' and a user profile for 'Anna Kulej'. The main heading is 'Park Hyatt New York - 6 nights' with the dates 'Sunday, October 9, 2022 - Saturday, October 15, 2022'. The advisor is listed as 'Sarah Smith' and 'Advisor: Anna Kulej'. The status is 'QUOTED'. 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 'Park Hyatt New York - 6 nights' and the 'Dates' field shows '10/09/2022' and '10/15/2022'. There is an 'Add details/notes' button. Below this, there is a section for 'All Services' with a 'View by' dropdown. A service card for 'Park Hyatt New York' is shown with the dates 'Oct 9, 2022 - Oct 15, 2022', a 'Rename' link, a 'PAYABLE' status, a 'Book' button, and a 'Remove' button. The 'Actions' section includes 'Modify' and 'Reorder Services'. At the bottom, there are two green boxes: one for 'Estimated Quote' showing 'USD \$571.00' and 'Potential Commission USD \$148.00' with an 'Add Insurance' button, and another for 'Client Documents' showing 'Insurance offered' with an 'Update' button. At the very bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

10.18.1.3 Activity Service

Activities must be in a QUOTED status with client and traveler added. You cannot apply the Client Pay Link before a client and traveler is added to the service.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ QUOTED status
 - No client/traveler assigned

The screenshot shows the ADX interface for an activity service. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains 'Anna Kulej'. The main header displays 'Brooklyn Bridge - Walking Tour' with dates 'Sunday, September 11, 2022 - Sunday, September 11, 2022' and advisor 'Sarah Smith'. 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 'Brooklyn Bridge - Walking Tour' and the 'Dates' field shows '09/11/2022'. Below the trip details, there is a section for 'All Services' with a 'View by:' dropdown. The service list includes 'Brooklyn Bridge - Walking Tour' with a 'Rename' link, a 'PAYABLE' status, a 'Book' button, and a 'Remove' button. Below the service list, there are 'Actions: Reorder Services' and two summary boxes: 'Estimated Quote' (USD \$47.00, Potential Commission USD \$12.00) with an 'Add Insurance' button, and 'Client Documents: Insurance offered' with an 'Update' button. At the bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

10.18.1.4 Insurance Service

Insurance must be in a QUOTED status with client and traveler. You cannot apply the Client Pay Link before a client and traveler is added to the service.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ QUOTED status
 - No client/traveler assigned

The screenshot shows the ADX Travel Select Plan Quote interface. At the top, there are navigation tabs for Partners, Clients, and Resources, along with a search bar for Bookings and a user profile for Anna Kulej. The main header displays the quote title "Travel Select Plan Quote" and the dates "Sunday, August 21, 2022 - Saturday, August 27, 2022". The advisor is listed as Sarah Smith. Below the header, there are tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. The Client & Travelers tab is active, showing the trip name "Travel Select Plan Quote" and the dates "08/21/2022" to "08/27/2022". There are buttons for "Add details/notes" and "Refresh Quote". The "All Services" section shows a "Travel Select Plan" service with a "PAYABLE" status, a "Book" button, and a "Remove" button. There are also "Actions: Modify" and "Reorder Services" options. A "Client Documents" section shows "Insurance offered" with an "Update" button. At the bottom, there are buttons for "Add ADX Service", "Add non-ADX Service", and "Send Itinerary".

10.18.1.5 Merchant of Record (MoR) Invoicing Service

Merchant of Record invoicing service must be in a BOOKED status with payment process set to TE Processes. You cannot apply the Client Pay Link to a Vendor Processes type of invoice.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ TE Processes payment
 - ✓ BOOKED status
 - No client/traveler assigned
 - Vendor Processes type
 - Quote

The screenshot displays the ADX interface for a booked trip. At the top, there are navigation tabs for 'Partners', 'Clients', and 'Resources', along with a search bar and a user profile for 'Anna Kulej'. The main header shows the trip name 'Courtyard Marriott College Stn' and the dates 'Monday, August 15, 2022 - Sunday, August 21, 2022'. The status is 'BOOKED IN/S'. Below the header, there are tabs for 'Trip', 'Client & Travelers', 'Payment', 'Service Fees', and 'Manage'. The 'Trip' tab is active, showing the trip name, dates, and a 'Refresh Quote' button. Below this, there is a section for 'All Services' with a 'View by' dropdown. The main content area shows a service card for 'Courtyard Marriott College Stn' with a 'Rename' button, dates 'Aug 15, 2022 - Aug 21, 2022', a 'Payment' button, and 'Vendor: Courtyard Marriott College Stn' and 'Service Provider: Courtyard Marriott College Stn'. There are also 'Modify' and 'Cancel' actions. Below the service card, there is an 'Actions: Reorder Services' button. At the bottom, there are two green boxes: one for 'Estimated Quote' showing 'USD \$208.00' and 'Potential Commission USD \$54.00' with an 'Add Insurance' button, and another for 'Client Documents' showing 'Insurance offered' with an 'Update' button. At the very bottom, there are buttons for 'Add ADX Service', 'Add non-ADX Service', and 'Send Itinerary'.

10.18.1.6 *Extra Fees – 247 fee and Service Fees*

Fees have a client assigned to the reference in order for it to be payable. You cannot apply the Client Pay Link when there is no client selected.

- **Requirements**
 - ✓ Client and traveler assigned
 - ✓ Processed alone
 - ✓ Processed with other services
 - No client/traveler assigned

The screenshot shows the ADX interface for a booking. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar. The main header displays the booking details for "Courtyard Marriott College Stn" from Monday, August 15, 2022, to Sunday, August 21, 2022. The advisor is Sarah Smith, and the contact is Anna Kulej. A "BOOKED N/S" badge 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, showing a table with the following data:

Travel Service	Est. Commission	Taxes	Cost		
Courtyard Marriott College Stn	EXTERNAL See Details	USD \$42.80	USD \$0.00	USD \$4,680.00	Payment
24/7 Support Fee		USD \$0.00	USD \$60.00		Payment
Consultation fee		USD \$0.00	USD \$50.00		Payment
Total		USD \$152.80	USD \$0.00	USD \$4,790.00	

1.2.2 Default on Profile

Default your account to always add the client payment link when applicable on the client itinerary. **Defaulting it ON** will always have the checkbox checked on the client itinerary so that you don't forget to add it for your clients.

The screenshot shows the ADX user profile settings page. At the top, there is a navigation bar with 'ADX', '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 corner. Below the navigation bar, a blue banner reads 'Welcome Anna! Use the following tiles to update any aspect of your ADX profile.' There are four tiles: 'Communication Profile', 'Access Sharing', 'Set Preferences', and 'Change Password'. The 'Set Preferences' tile is highlighted in green. Below the tiles, the 'Set Preferences' section is titled 'Customize your default values for certain fields within ADX'. It contains a list of settings with dropdown menus. The 'Default Client Pay selection (when available)' dropdown is open, showing 'On' selected. A 'Save Preferences' button is at the bottom.

1. ADX Partners Clients Resources Bookings Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej
2. Welcome Anna! 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 ADX users. Set Preferences: Customize default values for certain fields within ADX. Change Password: Change your password at anytime to ensure your account is secure.
4. 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: On. Client Itinerary View Quote Preference: By Date. Client Itinerary Canceled Services Visibility: Show by Default. Air Search Filters: No Filter Applied. Hide Agent Profile in Client Itinerary: No.
5. Save Preferences

[← BACK TO ITINERARY](#)

SPECIFY EMAIL CONTENTS

FROM: noreply@traveledge.com

TO: sarah@smith.com

SUBJECT: Multiple Hotel Services

BODY

B I U [List Icon] [List Icon] Normal : Default : [Text Icon]

Hello,
Please find attached details for your itinerary

If you have any questions please give me a call.

Best Regards,
Anna Kulej

Edits here apply to this message only – please see your advisor profile to edit your default signature and email text.

ATTACHMENTS Client Itinerary (See Below)

CUSTOMIZE CLIENT ITINERARY

Travel Services

Please check all services you want to appear on the client itinerary.

- PARK HYATT NEW YORK (PAYABLE) DISPLAY HOTEL MAP
- 24/7 SUPPORT (PAYABLE)
- AUTOMATICALLY ADDED FEE (PAYABLE)

6. This itinerary includes services eligible for client payment. **INCLUDE CLIENT PAYMENT LINK**
Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

07/17/2022 00:00 AM Eastern Time (ET)

	Steps		Notes
1.	Press v next to name		<ul style="list-style-type: none"> • <i>Your name on the top right corner</i>
2.	Press MY PROFILE		<ul style="list-style-type: none"> • <i>First item in the list</i>
3.	Press SET PREFERENCES button		<ul style="list-style-type: none"> • <i>Third box in the list</i>
4.	Press v next to Default Client Pay Selection and select ON		<ul style="list-style-type: none"> • <i>OFF will not automatically check the add link box on the client itinerary</i> • <i>ON will automatically check the add link box on the client itinerary</i>
5.	Press SAVE PREFERENCES		<ul style="list-style-type: none"> • <i>Saves changes on your profile</i>
6.	Verify box is checked on client itinerary		<ul style="list-style-type: none"> • <i>When applicable services are part of the reference</i>

1.2.3 Accessing Client Pay Link

The Client Pay Link lives on the client itinerary page. When you have services that are applicable and in a PAYABLE status, you can add the link to the itinerary document for the client to access and process payment. **REMINDER:** When adding the link and setting the expiry, you **MUST** press the SAVE/VIEW button for it to update the client document before emailing or downloading the file.

1. —————

2. —————

	Steps		Notes
7.	Open ADX reference	•	
8.	Press SEND ITINERARY	•	

The Client Itinerary Page

The Client Pay Link shows in the green box under the Customize Client Itinerary section.

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

« BACK TO ITINERARY

SPECIFY EMAIL CONTENTS

FROM: noreply@traveledge.com

TO: sarah@smith.com

SUBJECT: Multiple Hotel Services

BODY

B I U Normal Default *Ix*

Hello,
Please find attached details for your itinerary.

If you have any questions please give me a call.

Best Regards,
Anna Smith

Edits here apply to this message only – please see your advisor profile to edit your default signature and email text.

ATTACHMENTS Client Itinerary (See Below)

CUSTOMIZE CLIENT ITINERARY

Travel Services

Please check all services you want to appear on the client itinerary.

PARK HYATT NEW YORK (PAYABLE) DISPLAY HOTEL MAP

24/7 SUPPORT (PAYABLE)

AUTOMATICALLY ADDED FEE (PAYABLE)

This itinerary includes services eligible for client payment. INCLUDE CLIENT PAYMENT LINK

Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

07/17/2022 05:30 PM Eastern Time (ET)

The Client Itinerary Document

The Pay Now button will appear on the client itinerary along with the link expiry date and time.

Multiple Hotel Services for Miss Sarah Smith

Multiple Hotel Services Itinerary Status [QUOTE](#)

Sunday, July 17, 2022 – Monday, July 18, 2022

For Miss Sarah Smith

Pay for your services at our secure payment gateway with a credit card.
The payment link is valid until 07/17/2022 05:00 AM, Eastern Standard Time PAY NOW

DATE	TIME		EVENT	DESCRIPTION
JUL 17		📅	Check-in: Park Hyatt New York	Address: 153 West 57th St. New York 10019 United States
JUL 18		📅	Check-out: Park Hyatt New York	Address: 153 West 57th St. New York 10019 United States

INSURANCE

Speak to your advisor about the benefits of purchasing travel insurance today

VIP SUPPORT

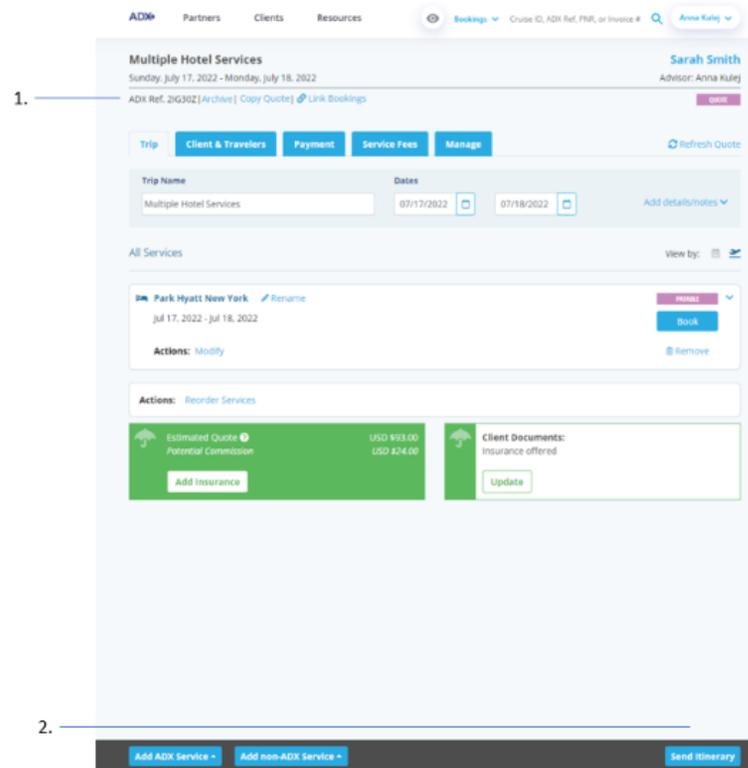
24/7 Access
Toll-Free (North America): 1 (888) 481-2064
Global: 1-(647) 288-3069

Anna Kulej

Anna's Travel
Anna.Kulej@worldviewtravel.com
555-444-5666

1.2.4 Setting Expiry on Link

Set an expiry date and time for the link to ensure payment from your client by a particular time frame. If you do not want to set a timeline, you can set expiry to the day before the trip start date. The timeline will be set on the client itinerary page before you send or download the document. Remember to press SAVE/VIEW CLIENT ITINERARY CHANGES for changes to save on the document before sending or downloading.



	Steps	 Notes
1.	Open ADX reference	<ul style="list-style-type: none">
2.	Press SEND ITINERARY button	<ul style="list-style-type: none"> <i>Bottom right corner</i>

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

[← BACK TO ITINERARY](#)

SPECIFY EMAIL CONTENTS

FROM:

TO:

SUBJECT:

BODY:

B I U Normal : Default :

Hello,
Please find attached details for your itinerary.
If you have any questions please give me a call.
Best Regards,
Anna Kulej

Edits here apply to this message only – please see your advisor profile to edit your default signature and email text.

ATTACHMENTS [Client Itinerary \(See Below\)](#)

CUSTOMIZE CLIENT ITINERARY

Travel Services

Please check all services you want to appear on the client itinerary.

PARK HYATT NEW YORK (PAYABLE) DISPLAY HOTEL MAP

24/7 SUPPORT (PAYABLE)

AUTOMATICALLY ADDED FEE (PAYABLE)

This itinerary includes services eligible for client payment. INCLUDE CLIENT PAYMENT LINK
Please set the date and time you would like this payment link to expire. If you have no timeline in mind, please set it to the day before the trip start date.

3. 5.

4. _____

	Steps		Notes
3.	Select date for expiry		<ul style="list-style-type: none"> • <i>Set any date up until the date of travel</i>
4.	Enter the time		<ul style="list-style-type: none"> • <i>Formatting is 00:00</i> • <i>Set AM/PM</i>
5.	Select time zone		<ul style="list-style-type: none"> • <i>Select from ET or PT</i> • <i>REMEMBER to press SAVE/VIEW itinerary changes before sending or downloading once set</i>

1.2.5 Client View – Payment Page

Once the client opens the itinerary document, the **PAY NOW** button will show in the executive summary along with the link expiration. Pressing the PAY NOW button will take the client to a secure payment page where they can enter their credit card details. The payment is processed in 3 steps.

Client Itinerary

Multiple Hotel Services for Miss Sarah Smith

Multiple Hotel Services Itinerary Status **QUOTE**

Sunday, July 17, 2022 – Monday, July 18, 2022

For Miss Sarah Smith

Pay for your services at our secure payment gateway with a credit card. PAY NOW

The payment link is valid until 07/17/2022 05:00 AM, Eastern Standard Time

DATE	TIME		EVENT	DESCRIPTION
JUL 17		📅	Check-in: Park Hyatt New York	Address: 153 West 57th St. New York 10019 United States
JUL 18		📅	Check-out: Park Hyatt New York	Address: 153 West 57th St. New York 10019 United States

INSURANCE

Speak to your advisor about the benefits of purchasing travel insurance today

VIP SUPPORT

24/7 Access
Toll-Free (North America): 1 (888) 481-2064
Global: 1-(647) 288-3069

Anna Kulej
Anna's Travel
Anna.Kulej@worldviewtravel.com
555-444-5666

1.2.5.1 Step 1: Enter payment Information

Round Trip Flights: Los Angeles - New York

ADX Ref: 3C7RC9

Invoiced To:
Sarah Smith
123 Sunny Drive, San Diego, California
United States 54323

Services Payable		Services Requiring Credit Card for Guarantee	
24/7 Support	USD \$60.00	 New York Marriott Downtown	USD \$3986.78
Automatically Added fee	USD \$100.00	View Details	
Fee is non refundable			
<hr/>		<hr/>	
PAYABLE AMOUNT	USD \$160.00	GUARANTEE AMOUNT	USD \$3986.78
			<i>Card will not be charged</i>

 **Payment Details**

1
Enter Payment Info

2
Confirm & Pay

3
Print/Send Receipt

Use address on file

Cardholder Name	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	Address	<input type="text"/>
Card Number	<input type="text"/>			<input type="text" value="optional"/>
Expiry Date	<input type="text" value="Month"/> <input type="text" value="Year"/>		City	<input type="text"/>
CVV Code	<input type="text"/>		Country	<input type="text" value="United States"/>
			State/Province	<input type="text" value="Alabama"/>
			Zip/Postal Code	<input type="text"/>

Proceed To Confirmation

1.2.5.2 Step 2: Confirm and Pay

SECURE PAYMENT GATEWAY
Travel Edge HQ

Welcome to the secure payment gateway - please input credit card details below to confirm the travel services booked through Anna Kulej.
If you have any questions, comments or concerns, please reach out to Anna Kulej prior to processing payment.

Round Trip Flights: Los Angeles - New York

ADX Ref: 3C7RC9

Invoiced To:
Sarah Smith
123 Sunny Drive, San Diego, California
United States 54323

Services Payable		Services Requiring Credit Card for Guarantee	
24/7 Support	USD \$60.00	 New York Marriott Downtown	USD \$3986.78
Automatically Added fee	USD \$100.00	View Details	
Fee is non refundable			
PAYABLE AMOUNT		GUARANTEE AMOUNT	USD \$3986.78
	USD \$160.00		<i>Card will not be charged</i>

 **Payment Details**



Amount	USD \$4,146.78	Address	123 Sunny Drive San Diego, California, United States 54323
Cardholder Name	Sarah Smith		
Card Number	XXXXXXXXXXXX9299		
Expiry	1/25		

Terms & Conditions

The Payment Details section above requires that you enter your confidential and personal information, including your residential address, credit card number, expiration date and verification number. You acknowledge and agree that you consent to the collection of this information for the sole purpose of booking the product or service above. You are solely responsible for verifying that the credit card information that you input is correct.

I have read the terms and conditions. [Make Payment](#)

1.2.5.3 Step 3: Print/Send Receipt

St Regis New York - 5 nights

ADX Ref: 7IX70I

Invoiced To:

Cara Jones
123 Sunny Drive, Brooklyn, New York
United States 20678

Services Payable		Services Requiring Credit Card for Guarantee	
24/7 Support Support plan	USD \$60.00	 Gardens Nyc Affinia Gardens, New York View Details	USD \$4250.00
PAYABLE AMOUNT	USD \$60.00	GUARANTEE AMOUNT	USD \$4250.00 <i>Card will not be charged</i>

 **Payment Details**


Enter Payment Info


Confirm & Pay

3
Print/Send Receipt

Confirmed!

Your credit card has been processed successfully. Your agent will be in touch with you for next steps.

 Gardens Nyc Affinia Gardens, New York 

24/7 Support 4SC96617HX9145815 

 Print Confirmation

1.2.5.4 Service Price Change

If a **price change** occurs on a service, the client will be prompted before entering their credit card information for payment. The advisor will see the original price and the revised price and will need to either decline or accept the revisions. Advisor will receive a notification on the price change and whether the client accepted or declined it.

SECURE PAYMENT GATEWAY

Travel Edge HQ

Welcome to the secure payment gateway - please input credit card details below to confirm the travel services booked through Anna Kulej.
If you have any questions, comments or concerns, please reach out to Anna Kulej prior to processing payment.

Multiple Hotel Services

ADX Ref: 2IG30Z

Invoiced To:
Sarah Smith
123 Sunny Drive, San Diego, California
United States 54323

We have received price revisions for the services listed below.

SERVICE NAME	ORIGINAL PRICE	REVISED PRICE
Park Hyatt New York	USD \$1273.64	USD \$961.67

I have read and understood the price revisions.

Decline [Accept Revised Prices](#)

AD^x Partners Clients Resources **Bookings**

Multiple Hotel Services

Sunday, July 17, 2022 - Monday, July 18, 2022

ADX Ref. 2IG30Z | [Archive](#) | [Copy Quote](#) | [Link Bookings](#)

Sarah Smith
Advisor: Anna Kulej

[QUOTE](#)

[Trip](#) [Client & Travelers](#) [Payment](#) [Service Fees](#) [Manage](#) ¹ [Refresh Quote](#)

Notifications

[Create Notification](#) [Include Hidden](#)

Service	Date	Notification
• Park Hyatt New York	Jun 2, 2022	There was a price change for the travel service, and client accepted it.

[Hide](#)

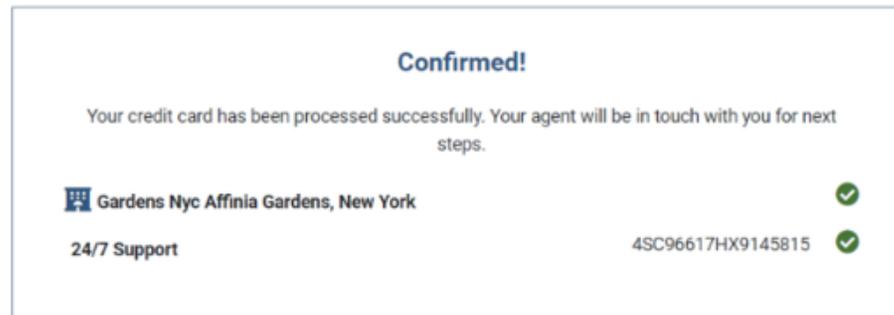
1.2.6 Advisor View - Advisor Notifications

Once the client attempts to pay for services using the Client Pay Link, a notification will be generated for the advisor stating an attempt at payment was made and it was successful, or it failed. These notifications will be emailed to the primary advisor on the file and will live under the MANAGE tab notification section of the specific itinerary.

1.2.6.1 Successful Attempt

When the client attempts the payment and payment goes through, all services as part of that payment will confirm with each vendor and confirmation numbers will be pro

- **Client View**



- **Advisor View**

ADX Partners Clients Resources Bookings 2 Cruise ID, ADX Ref, PNR, or Invoice # Anna Kulej

St Regis New York - 5 nights Thursday, June 30, 2022 - Tuesday, July 5, 2022 **Cara Jones**
Advisor: Anna Kulej

ADX Ref. 7iX70i | Archive | Link Bookings **TRAVEL-READY**

Trip Client & Travelers Payment Service Fees **Manage** 2 Refresh Quote

Notifications Create Notification Include Hidden

Service	Date	Notification	
• Gardens Nyc Affinia Gardens, New York	Jun 1, 2022	Client tried to pay through Client Pay flow and payment succeeded.	Hide
• 24/7 Support	Jun 1, 2022	Client tried to pay through Client Pay flow and payment succeeded.	Hide

1.2.6.2 Failed Attempt

When the client attempts payment and payment fails, the client will be directed to contact their advisor for next steps. Advisor will receive a failed attempt notification and failed service will NOT be confirmed with the vendor.

- **Client View**

Your transaction was not successful

There was an issue making a payment. Please make a note of the failed transactions below and contact your agent for next steps.

<input type="checkbox"/> Brooklyn Bridge - Walking Tour	
24/7 Support	Not Processed
Automatically Added fee	Not Processed

- **Advisor View**

ADXPartnersClientsResources

 Bookings ▼ Cruise ID, ADX Ref, PNR, or Invoice #  Anna Kulej ▼

TripClient & TravelersPaymentService FeesManage 1

Refresh Quote

Notifications  Create Notification  Include Hidden

Service	Date	Notification	
• Brooklyn Bridge - Walking Tour	Jun 2, 2022	Client tried to pay through Client Pay flow and payment failed.	Hide