



Quick Guide –  
Manager Access  
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. MANAGER ACCESS

Accounts set up in TRAMS with a MANAGERS group will give the account access to the Office Management page and some management features for the office they are associated with.

- Visibility to all quotes/bookings/clients regardless of sharing permissions
- Office management ability to turn on/off portions of ADX
- Access advisor profiles
- Set office wide suggested fee structure
- Set regulatory information on all accounts – Coming Soon!
- Receive regular list of pending unactioned air schedule changes

Office Management

SELECT OFFICE Travel Edge HQ

**Note:** Once you have saved the changes, the affected agents will need to log out for the changes to take effect.

Travel Edge HQ

Agent Name

AIR  HOTEL  CRUISE  ACTIVITY  INSURANCE  EXTERNAL  EMULATOR  CLIENT PAY

### 1.2.1 Accessing Quotes and Bookings

Management accounts will be able to view all quotes and bookings, as well as access all client profiles under the office they are set to manage.

#### 1.19.1.1 Using ADX As

The Using ADX As feature will change whose items you are viewing in the Quotes and Bookings section of the dashboard. With a management account, you can opt to see your own items, your delegated accounts and/or quotes for your entire team by selecting ALL on the Using ADX AS feature.

**Advisor column** determined by Using ADX AS feature. Will show initials of primary owner. Will see most recent 8 quotes and bookings

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICE	
QUOTE	DA	Mary Kleen	Hyatt Regency Aruba Resort And - 5 nights	08.07.22	✈️	06.03.22 <a href="#">View</a>
QUOTE	AK		One Way Flight: Los Angeles to New York	06.27.22	✈️	06.02.22 <a href="#">View</a>
QUOTE	AK	Sarah Smith	Brooklyn Bridge - Walking Tour	09.11.22	🗺️	06.02.22 <a href="#">View</a>
QUOTE	AK	Sarah Smith	Travel Select Plan Quote	08.21.22	📄	06.02.22 <a href="#">View</a>
QUOTE	AK	Sarah Smith	Park Hyatt New York - 6 nights	10.09.22	🏨	06.02.22 <a href="#">View</a>
BOOKED N/A	AK	Sarah Smith	One Way Flight: Los Angeles to New York	11.20.22	✈️	06.02.22 <a href="#">View</a>
QUOTE	AK	Sarah Smith	Brooklyn Bridge - Walking Tour	10.16.22	🗺️	06.02.22 <a href="#">View</a>
QUOTE	DA		Multi-City Flight: Los Angeles - Frankfurt-am-M...	07.14.22	✈️	05.31.22 <a href="#">View</a>

**Using ADX AS** determines who's items you see in the Quotes and Bookings section

**Me** – View your own only  
**Name below** – Delegated accounts  
**ALL** – View everyone across an office

### 1.19.1.2 Filter by Advisor

Viewing by specific advisor can be done by applying the advisor filter to the quotes and bookings section on the dashboard. Press the v to expand the filter and enter the advisor's name into the search box. Once the filter is applied, the quotes and bookings section will show ONLY the items pertaining to that advisor.

**Advisor column** lets you enter an advisor name (first or last) to ONLY show that advisors items

The screenshot shows the ADX dashboard interface. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, Bookings, and a search bar for 'Cruise ID, ADX Ref, PNR, or Invoice #' with the user name 'Anna Kulej'. Below these are several tool buttons: ITINERARY BUILDER, AIR, HOTEL, ACTIVITY, INSURANCE, CRUISE, and INVOICE TOOL. A dropdown menu for 'USING ADX AS:' is set to 'Multiple Agents'. The main section is 'MY QUOTES & BOOKINGS' with a 'VIEW ALL' link. A table lists various quotes and bookings. A dropdown menu is open over the 'ADVISOR' column, showing options to 'SORT BY ADVISOR', 'ME', and 'ALL'. A search box within the dropdown contains 'Demo|ADX' and shows a list of advisors: 'Demo ADX' and 'Demo Travelex'.

STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	
QUOTE			Regency Aruba Resort And - 5 nights	08.07.22		06.03.22	View
QUOTE			Way Flight: Los Angeles to New York	06.27.22		06.02.22	View
QUOTE			Brooklyn Bridge - Walking Tour	09.11.22		06.02.22	View
QUOTE				08.21.22		06.02.22	View
QUOTE	AK	Sarah Smith	Park Hyatt New York - 6 nights	10.09.22		06.02.22	View
BOOKED N/A	AK	Sarah Smith	One Way Flight: Los Angeles to New York	11.20.22		06.02.22	View
QUOTE	AK	Sarah Smith	Brooklyn Bridge - Walking Tour	10.16.22		06.02.22	View
QUOTE	DA		Multi-City Flight: Los Angeles - Frankfurt-am-M...	07.14.22		05.31.22	View

Using ADX AS set to ALL

1.19.1.3 View All Page

View more than 8 recent quotes on the **View All** page on the dashboard. Apply filters using the v on the header and search by advisor, client etc. on items for the entire office.

« BACK TO DASHBOARD

### My Quotes & Bookings

SHOW ARCHIVED QUOTES Results: 1 - 20 of 7337

Filters:  
No filters applied. Click on column headings to narrow down your search results.

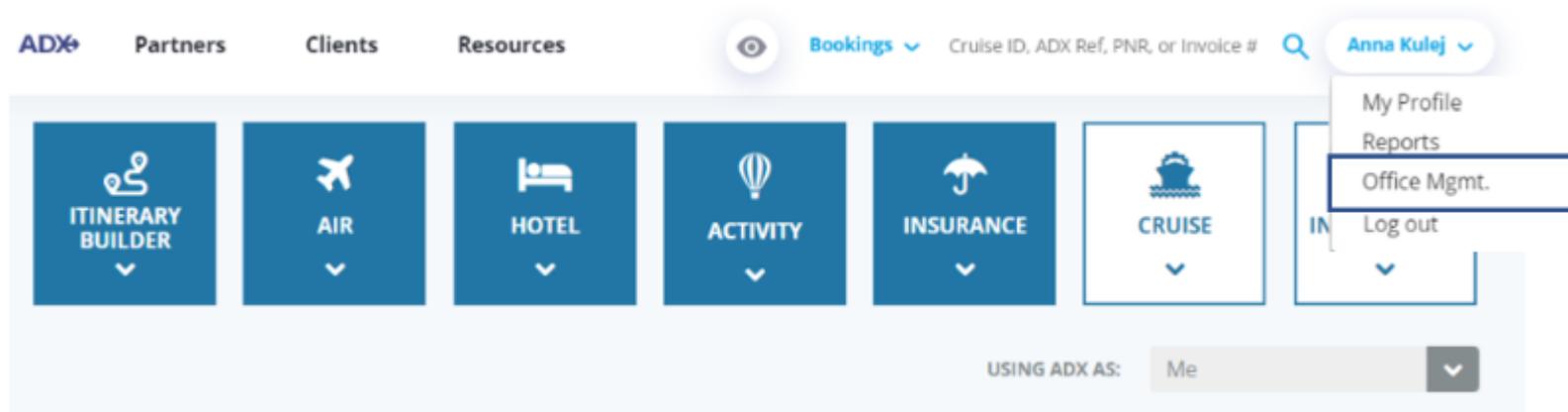
Archive	STATUS	ADVISOR	CLIENT	QUOTE NAME	DEPART	SERVICES	UPDATED	View
<input type="checkbox"/>	QUOTE	DA	Mary Kleen	Hyatt Regency Aruba Resort And - 5 nights	08.07.22		06.03.22	View
<input type="checkbox"/>	QUOTE	AK		One Way Flight: Los Angeles to New York	06.27.22		06.02.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Brooklyn Bridge - Walking Tour	09.11.22		06.02.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Travel Select Plan Quote	08.21.22		06.02.22	View
<input type="checkbox"/>	QUOTE	AK	Sarah Smith	Park Hyatt New York - 6 nights	10.09.22		06.02.22	View
<input type="checkbox"/>	BOOKED N/A	AK	Sarah Smith	One Way Flight: Los Angeles to New Ynrk	11.20.22		06.02.22	View

### 1.19.2 Office Management Page

Accounts set up with the MANAGERS group in Trams will have access to the OFFICE MGMT. section under the advisor profile page. This section will allow managers or admin to:

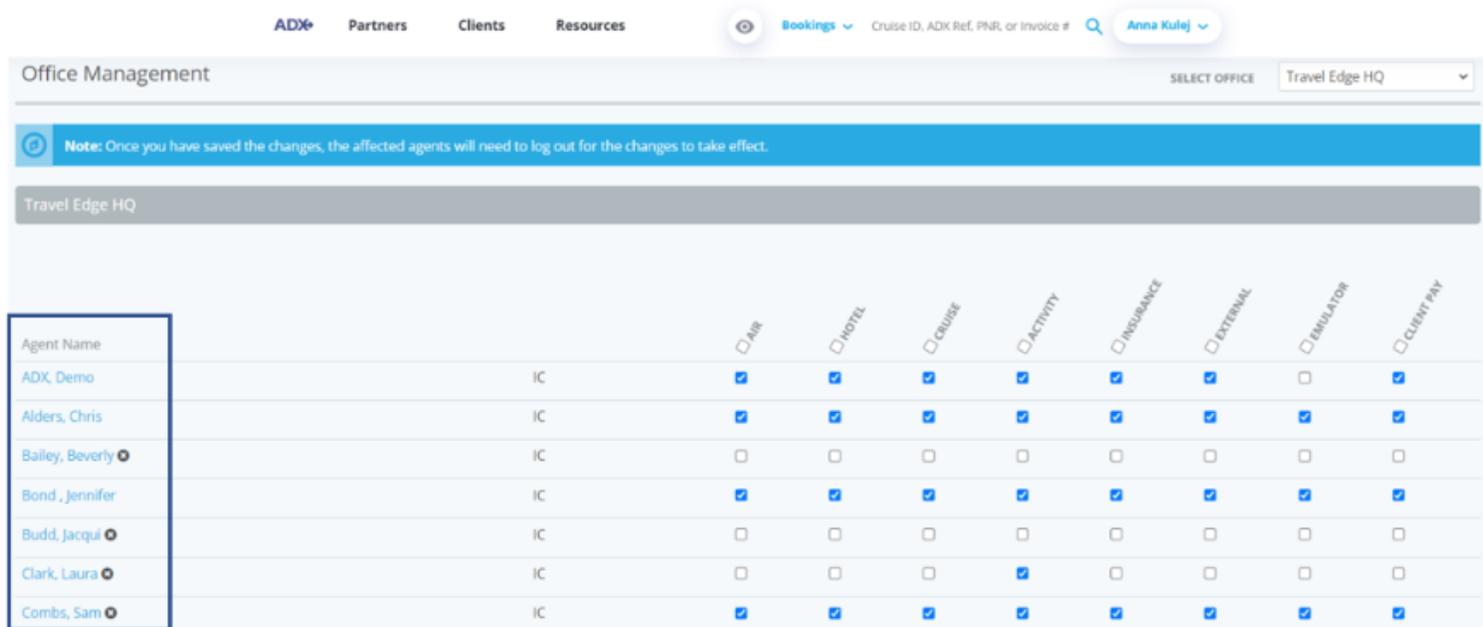
- manage advisor lists
- access advisor profiles
- reset passwords
- configure modules
- set the suggested planning fee structures.
- set regulatory information – Coming Soon!

To access the Office Management page, press the v button next to your name and click the Office Mgmt. button. This will take you to your office management page.



1.19.2.1 Manage Advisor List

Management accounts will be able to view the list of advisors that are associated with their office. This list will show who is currently active vs not active in the system. Any account that has an  next to the name is a locked account with no access into ADX.



The screenshot shows the 'Office Management' interface for 'Travel Edge HQ'. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains 'Anna Kulej'. Below the navigation is a 'SELECT OFFICE' dropdown menu set to 'Travel Edge HQ'. A blue notification bar states: 'Note: Once you have saved the changes, the affected agents will need to log out for the changes to take effect.' Below this is a table of advisors. The table has columns for 'Agent Name', 'IC', and checkboxes for 'AIR', 'HOTEL', 'CRUISE', 'ACTIVITY', 'INSURANCE', 'EXTERNAL', 'EMULATOR', and 'CLIENT PAY'. The 'Agent Name' column is highlighted with a blue border. The 'AIR', 'HOTEL', 'CRUISE', and 'CLIENT PAY' columns are checked for all advisors except Bailey, Beverly, Budd, Jacquie, and Clark, Laura, which are marked as locked (indicated by a lock icon).

Agent Name	IC	<input type="checkbox"/> AIR	<input type="checkbox"/> HOTEL	<input type="checkbox"/> CRUISE	<input type="checkbox"/> ACTIVITY	<input type="checkbox"/> INSURANCE	<input type="checkbox"/> EXTERNAL	<input type="checkbox"/> EMULATOR	<input type="checkbox"/> CLIENT PAY
ADX, Demo	IC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Alders, Chris	IC	<input checked="" type="checkbox"/>							
Bailey, Beverly 	IC	<input type="checkbox"/>							
Bond, Jennifer	IC	<input checked="" type="checkbox"/>							
Budd, Jacquie 	IC	<input type="checkbox"/>							
Clark, Laura 	IC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Combs, Sam 	IC	<input checked="" type="checkbox"/>							

### 1.19.2.2 Accessing Advisor Profiles

Management accounts can access any advisor profile to review and configure accounts by clicking on the name of the advisor on the management page. This will take you to that advisor's profile page and their communication profile, sharing settings, preferences, and password resets. Management accounts can update the communication details including uploading logos, set sharing permissions and delegations on accounts as well as resetting passwords.

Click the advisor's name to access their profile page

Agent Name		<input type="checkbox"/> AIR	<input type="checkbox"/> HOTEL	<input type="checkbox"/> CRUISE	<input type="checkbox"/> ACTIVITY	<input type="checkbox"/> INSURANCE	<input type="checkbox"/> EXTERNAL	<input type="checkbox"/> TRANSLATOR	<input type="checkbox"/> COLLECT PAY
ADX, Demo	IC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Alders, Chris	IC	<input checked="" type="checkbox"/>							
Bailey, Beverly	IC	<input type="checkbox"/>							
Bond, Jennifer	IC	<input checked="" type="checkbox"/>							

Welcome Anna! Use the following tiles to update any aspect of your ADX profile.

- 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.

### 1.19.2.3 Resetting Advisor Password

From the advisor's profile whose password you want to reset, press the **CHANGE PASSWORD** button at the top of the page. If you know the current password for that account, you can use the Change Password section to apply a new password. If you do not have the current password on the account, press the SEND PASSWORD RESET EMAIL button. The advisor will receive an email to the email on the account with reset instructions.

**Change password for the advisor if you know the current one**

**Send advisor a password reset email with instructions**

The screenshot shows the ADX user profile page for 'Anna Kutig'. The navigation bar includes 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. A welcome message 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 'Change Password' tile is highlighted in green. Below the tiles, the 'Change Password' section is active, showing password requirements (at least 8 characters, including one upper case letter, one lower case letter, and one digit or special character) and three input fields: 'CURRENT PASSWORD', 'NEW PASSWORD', and 'REPEAT PASSWORD'. There are 'Change Password' and 'Cancel' buttons. Below this is the 'Admin Password Reset' section with a 'Send Password Reset Email' button. The footer contains 'ADX Copyright TravelEdge 2022 - All Rights Reserved.' and 'Version: 7.21.13.2'.

### 1.19.2.4 Configure Modules

Management accounts can select what ADX and features are enabled on each advisor account. Unchecking the module box will grey out the module on the main dashboard and advisor will not be able to access it. When changing the access on an account, be sure to press SAVE CHANGES button at the bottom of the page for the changes to take effect.

The screenshot shows the 'Office Management' interface for 'Travel Edge HQ'. At the top, there are navigation tabs: ADX, Partners, Clients, Resources, and Bookings. A search bar contains 'Anna Kulej'. Below the navigation is a 'SELECT OFFICE' dropdown menu set to 'Travel Edge HQ'. A blue notification bar states: 'Note: Once you have saved the changes, the affected agents will need to log out for the changes to take effect.' Below this is a table of agent accounts with columns for various modules. A blue box highlights the table area.

Agent Name		<input type="checkbox"/> AIR	<input type="checkbox"/> HOTEL	<input type="checkbox"/> CRUISE	<input type="checkbox"/> ACTIVITY	<input type="checkbox"/> INSURANCE	<input type="checkbox"/> EXTERNAL	<input type="checkbox"/> EMULATOR	<input type="checkbox"/> CLIENT PAY
ADX, Demo	IC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Alders, Chris	IC	<input checked="" type="checkbox"/>							
Bailey, Beverly	IC	<input type="checkbox"/>							
Bond, Jennifer	IC	<input checked="" type="checkbox"/>							
Budd, Jacqui	IC	<input type="checkbox"/>							
Clark, Laura	IC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Combs, Sam	IC	<input checked="" type="checkbox"/>							

Save Changes

1.19.2.5 Default Branch Planning Fee Amount

Management accounts can customize the suggested planning fee amounts that show up on each advisors quotes automatically . Fees are NOT automatically added to each quote but appear as a suggested value that the advisor can set to active and process.

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

Office Management SELECT OFFICE Travel Edge HQ

Note: Once you have saved the changes, the affected agents will need to log out for the changes to take effect.

Travel Edge HQ

Agent Name		<input type="checkbox"/> AIR	<input type="checkbox"/> HOTEL	<input type="checkbox"/> CRUISE	<input type="checkbox"/> ACTIVITY	<input type="checkbox"/> INSURANCE	<input type="checkbox"/> EXTERNAL	<input type="checkbox"/> EMULATOR	<input type="checkbox"/> CLIENT PAY
ADX, Demo	IC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Alders, Chris	IC	<input checked="" type="checkbox"/>							
Bailey, Beverly	IC	<input type="checkbox"/>							
Bond, Jennifer	IC	<input checked="" type="checkbox"/>							
Budd, Jacqui	IC	<input type="checkbox"/>							
Clark, Laura	IC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Combs, Sam	IC	<input checked="" type="checkbox"/>							

Save Changes

Customize your suggested fee amounts

You can add suggested amounts for the fees. These suggestions will help your agents when they set up their fee structure. If you do not wish for a suggested fee amount to appear you can enter an amount of \$0.00 and agents will not see a suggestion.

Travel Service	Branch Settings
Planning Fee	USD \$ 150.00
Change Fee	USD \$ 30.00

Save suggested fee amounts

### 1.19.3 Pending Unactioned Schedule Change List

Management accounts will receive a **daily email from ADX** listing the itineraries that have been on the schedule change queue for more than 72 hours. Review the action required by pressing the link directly in the email, which will open the all notifications page in ADX. Management can use this email to advisor advisors who appear on this list to get the schedule changes actioned. Unactioned schedule changes are subject to Air team fees as well as out of synch itineraries.

#### Action Required Schedule Changes Report - May 27, 2022



adx.noreply@traveledge.com

To ● Anna Kulej

[↩ Reply](#) [↩ Reply All](#) [➔ Forward](#) [📧](#) [⋮](#)

Fri 5/27/2022 7:00 AM

[i](#) If there are problems with how this message is displayed, click here to view it in a web browser.



#### ACTION REQUIRED SCHEDULE CHANGES REPORT - MAY 27, 2022

You are receiving this notification because there are pending air schedule change notifications for your branch/branches which haven't been accepted in the last 72 hours.

It is important to action schedule changes to avoid any potential missed connections and keep itineraries up to date.

Office Name: Travel Edge HQ

Agent Name	Agent Email	View/Action
David Thorne	david.thorne@traveledge.com	1 requiring action

Please note that replies to this email are not being monitored. Create a support ticket within ADX if you need assistance.