



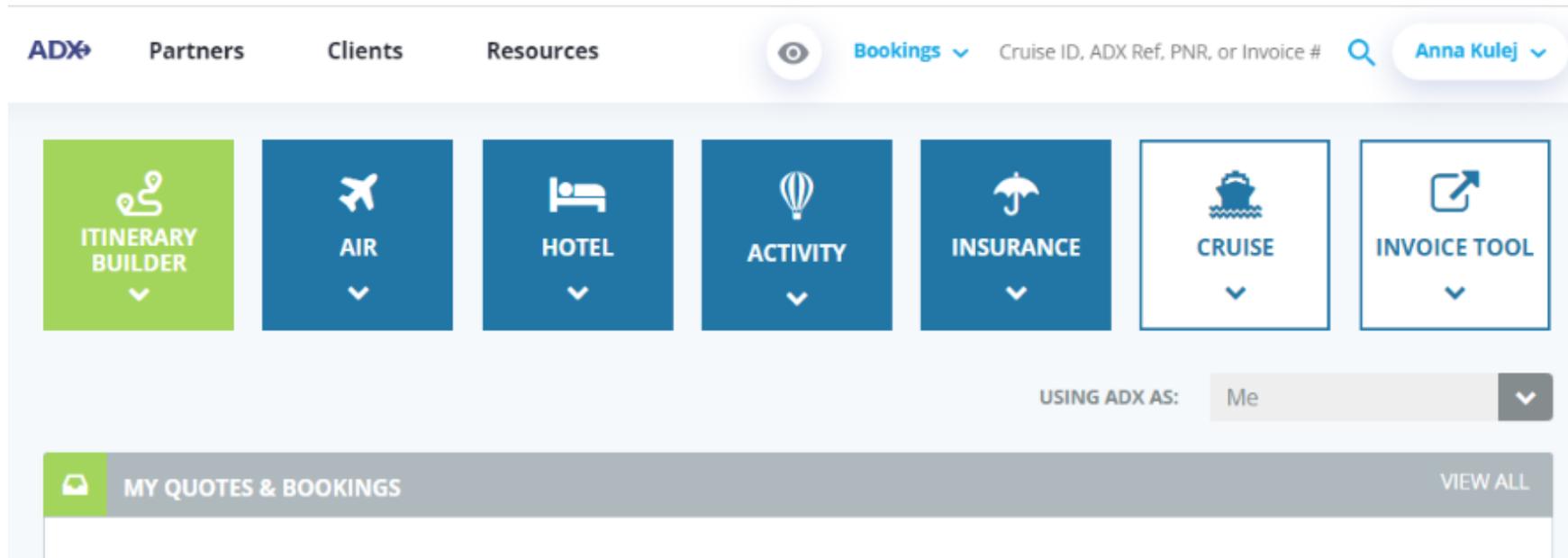
Itinerary Builder
June 2022

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1.Itinerary Builder

The ADX Itinerary Builder will let you start building the shell of your client’s trips with minimal amounts of information. This can be handy if you have a client on the phone and want to capture the details but not run any searches. Once you have the shell set in place you can freely add travel services (air, hotel, activities, insurance, external services) to the trip.



1.1. CREATING AN ITIENRARY SHELL

The shell itinerary will be created directly from the Dashboard by pressing the ITINERARY BUILDER button. Enter the required information and press START to create the ADX reference shell.

The screenshot shows the 'ITINERARY BUILDER' section of a dashboard. At the top, there are navigation tabs for 'ADX', 'Partners', 'Clients', and 'Resources'. A search bar contains 'Bookings' and a dropdown for 'Cruise ID, ADX Ref, PNR, or Invoice #'. The user's name 'Anna Kulej' is displayed in the top right. Below the navigation is a row of seven buttons: 'ITINERARY BUILDER' (highlighted in green), 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL'. Below this is a section titled 'NEW TRAVEL EXPERIENCE' with a sub-header 'Please tell us a bit about the travel experience you're building (you can edit these later)'. The form contains the following fields and elements:

- 1.** Points to the 'ITINERARY BUILDER' button.
- 2.** Points to the 'TRIP NAME' input field.
- 3.** Points to the 'TRIP DATES' field, which includes two date pickers labeled 'MM/DD/YYYY' and 'TO'.
- 4.** Points to the 'CLIENT (Optional)' field, which has a search icon and a dropdown menu.
- 5.** Points to the 'New Client' button.
- 6.** Points to the 'Start' button at the bottom right.

	Steps		Notes
1.	Click on ITINERARY BULIDER button		<ul style="list-style-type: none"> • <i>Located on advisor dashboard</i>
2.	Enter the trip name		<ul style="list-style-type: none"> • <i>Name will appear at top of Trip Services page and client document</i> • <i>Trip name is searchable in Quotes and Bookings section</i>
3.	Enter trip start and end dates		<ul style="list-style-type: none"> • <i>You can edit these once the trip reference is created</i>
4.	Add client		<ul style="list-style-type: none"> • <i>Search for client OR create new client</i> • <i>Optional</i>
5.	Select Quote Owner		<ul style="list-style-type: none"> • <i>Related to delegations</i>
6.	Press START		<ul style="list-style-type: none"> • <i>Will create an ADX reference</i>

1.2. ADDING SERVICES TO ITINERARY SHELL

Once your itinerary shell is created, you can use the ADD buttons at the bottom of the page to begin building your clients trip and adding services to the reference. You can add both services to purchase within ADX as well as ones purchased externally and invoiced through ADX.

The screenshot shows the ADX system interface for a client named Anna Kulej. The main header includes navigation links for ADX, Partners, Clients, and Resources, along with a search bar and the user's name. The main content area is titled "Anna's Adventure" and shows the trip dates as Sunday, August 21, 2022, to Saturday, August 27, 2022. The ADX reference is 3C7TBF. The interface includes tabs for Trip, Client & Travelers, Payment, Service Fees, and Manage. The "Trip Name" field contains "Anna's Adventure" and the "Dates" field shows "08/21/2022" and "08/27/2022". The "All Services" section is currently empty, and the "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".

ADX reference — ADX Ref. 3C7TBF | Archive | Copy Quote | Link Bookings

Trip details that were added — Trip Name: Anna's Adventure | Dates: 08/21/2022 | 08/27/2022

No services added — All Services

Add Services to reference — Add ADX Service + | Add non-ADX Service + | Send Itinerary