



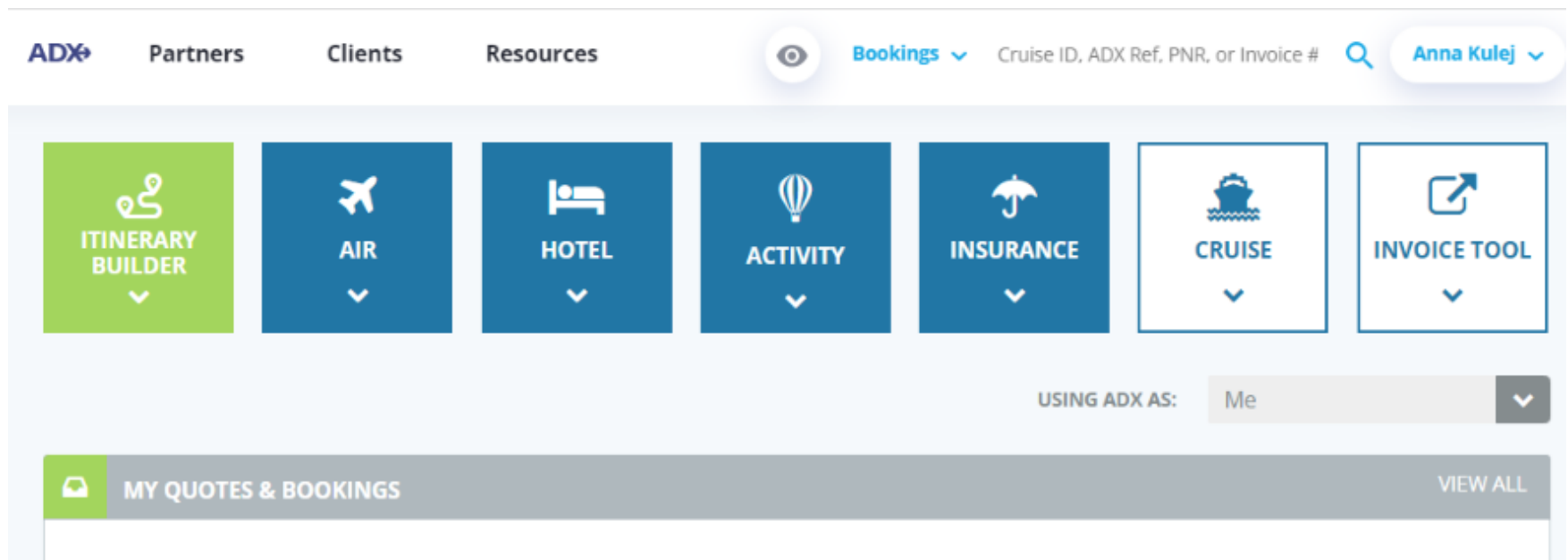
Quick Guide –
Creating an Itinerary Shell
June 2022

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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 displays the ADX dashboard with a top navigation bar containing 'ADX', 'Partners', 'Clients', 'Resources', 'Bookings', and a search bar. Below the navigation bar is a row of seven buttons: 'ITINERARY BUILDER' (green), 'AIR', 'HOTEL', 'ACTIVITY', 'INSURANCE', 'CRUISE', and 'INVOICE TOOL' (all blue). A callout line labeled '1.' points to the 'ITINERARY BUILDER' button.

Below the buttons is a section titled 'NEW TRAVEL EXPERIENCE' with a subtitle 'Please tell us a bit about the travel experience you're building (you can edit these later)'. This section contains several input fields and a 'Start' button. Callout lines point to the following elements:

- 2. 'TRIP NAME' text input field
- 3. 'TRIP DATES' field, which includes two date pickers labeled 'MM/DD/YYYY' and 'TO'.
- 4. 'CLIENT' text input field with a search icon.
- 5. 'CLIENT (Optional)' text below the client input field.
- 6. 'Start' button at the bottom right of the form.

Additional elements in the form include a 'QUOTE OWNER' dropdown menu currently showing 'Anna Kulej' and a '+ New Client' button.

	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>