

East Office Hours

Presented by Beth Curran

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Poll!

What are you using ADX for?

Q. When it says, "Is client traveling?" and you say "Yes". then it asks for travelers, do you put in the client again, or companion?

A. If you check yes on the box that asks, "is client traveling" ADX will automatically populate the first Traveler with your client's information. If you have other's joining, you can (and should) fill in their information as well. If you are still seeing a blank box after selecting the client is traveling box, contact ADX support immediately.

Q. Can you review the invoicing process?

Q. Can you review the hotel and cruise process?

Q. How do you find exactly what the commission was?

A. The vendor should tell you what the commission earned on the booking is. If you aren't sure or are having trouble locating the commission, you can reach out to the vendor or to Advisor Services for more assistance.

Q. Is the tour company going to tell them when the rest of payment is due, or do you send them a reminder ? Is there a link they can pay balance through, or you have to do the rest of the payment over the phone with them?

A. This depends entirely on the tour company you are working with. Typically, when you book on behalf of your clients all communication goes through you then from you to the client so you would be responsible for reminding them about the final payment. The method for paying the tour company does entirely depend on them.

Q. If I have an invoice that I previously put into ADX and the total amount changes after a few payments have been made. What would be the best way to resolve this?

A. On the trip services page of the ADX reference for the service, click modify on the service and as long as the final payment has not been recorded you can edit the total amount as needed. If final payment has been recorded, you would need to void the previous invoice and then start from scratch.

Q. I am new and have not invoiced anything yet. I would appreciate learning where to find the resources to learn how to do that.

A. In ADX click your name in the top right corner, then click Help. You'll be taken directly to the ADX Training section of the training resources in the Intranet.

Q. Do you always write up the invoice at the same time / directly after you book a service ?

A. We recommend that as soon as you have the booking confirmed and/or deposit paid to the vendor that you complete your invoice so you can track the payments made and owed. This also cuts down on any last minute month end or year end invoicing you may have to complete.

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