STATEMENT VIEWS AT A GLANCE

To better support professional travel advisors, Classic Vacations has introduced three updated statement views: **Full, Invoice, and Travel.** Each view has a refreshed design and is built for a specific purpose, whether you are preparing a detailed proposal, presenting an invoice with payment history, or sharing client-ready travel documents. All views can be emailed or downloaded as a PDF, allowing you to choose the format that fits your workflow.

HOW DO I ACCESS THE NEW STATEMENT VIEWS?

You can see the Full View from the Quote page or from Booking Details by clicking the Preview and Share button, located in the upper right corner of both pages.

CAN I STILL SEND A STATEMENT TO MY CLIENT FROM QUOTE OR BOOKING DETAILS PAGES

No. Instead, select **Preview and Share**, then choose **Share** from the view you want to share. You can **Send to Client, Send to Yourself**, or **Download PDF**. If you choose one of the send options, the system will generate an email with a link to the selected view (Full, Invoice, or Travel) rather than attaching a document.

WHY ARE THERE MULTIPLE VIEWS OF THE FINAL DOCUMENT?

To give you greater flexibility. Each view provides the level of detail you prefer, whether you need full legal terms or a clean, concise summary. This allows you to select the version that aligns with the stage of the booking process and meets your client's needs.

CUSTOMIZATION OPTIONS

CAN I TURN COMPONENT PRICING ON AND OFF?

Yes. The default setting for line item, component-level pricing is OFF. You can turn this ON for a specific booking and save that preference. Once enabled, component pricing appears in both the **Full View** and the **Invoice View.**

Note: Use caution when enabling component pricing. Agency fees and other non-booking items may not appear in the detailed list, and the total of the displayed components may not match the Total Trip Cost.

CAN I TURN THE PAYMENT SUMMARY ON AND OFF?

Yes. The Payment Summary Card is ON by default. You can turn this OFF for an individual booking and save that preference. This removes the Payment Summary Card from the **Full View**, which can be helpful when sending an initial proposal to a client who has not yet finalized their selections and made a deposit.

Note: When the Payment Summary is turned OFF, the Invoice View becomes unavailable because this card is an essential part of the invoice.

FULL VIEW [PROPOSED ITINERARY]

WHAT IS THE FULL VIEW?

The Full View presents the complete document, including the itinerary as well as all terms, conditions, and policies. It features a modern design with individual cards for each booking component, along with key details about you as the advisor, costs, travel advisories, and support contacts. This view provides everything needed to ensure your client is fully informed.

WHEN SHOULD I USE THE FULL VIEW?

Use this view when sending a proposal or quote or when a booking has been updated. The client can see all booking components and click through to review details such as terms, conditions, policies, and included amenities.

INVOICE VIEW

WHAT IS THE INVOICE VIEW?

The Invoice View provides a concise summary, free from legal jargon. It lists each component as a line item with date and traveler information, overall cost summaries, payment history, and a payment link. When component pricing is turned ON, individual component prices also appear.

WHEN SHOULD I USE THE INVOICE VIEW?

This is an ideal short form to use when requesting an interim or final payment.

TRAVEL VIEW [TRAVEL ITINERARY]

WHAT IS THE TRAVEL VIEW?

The Travel View provides card-style details for all booking components, giving travelers the essential information they need, including flight departures and connections, hotel check-ins, and tour locations with start times. Clients can access this view on a mobile device or print it for use during travel. The Travel View does not include the detailed terms found in the Full View.

WHEN SHOULD I USE THE TRAVEL VIEW?

The Travel View should be provided to clients when the itinerary is finalized and shortly before travel. In case of schedule changes, the Travel View should be resent to ensure that the client has the most accurate information

CAN THE TRAVEL VIEW INCLUDE PRICING?

No. The Travel View will never include any pricing or payment information. This view is meant to be used for travel purposes only.

SHARING OPTIONS

CAN I STILL DOWNLOAD A WORD DOCUMENT?

Yes. A word document download is available for Invoiced or Pending Bookings from the Booking Details page.

CAN I STILL UPLOAD TO AXUS?

Yes. Axus upload is available for Invoiced or Pending bookings from the Booking Details page.

CAN I DOWNLOAD A PDF DOCUMENT?

Yes. Each view (Full, Invoice, Travel) includes a PDF download option, so you can save or share the version that best fits your needs.

CAN I SEND DOCUMENTS TO MYSELF AND OR MY CLIENT?

Yes. You can send a link to any of the new views to yourself or to your client. The previous statement format from the Booking Details page is no longer available.

PAYMENTS

CAN I APPLY PAYMENTS MYSELF?

Yes. From the Booking Details page, you have the option to Apply Payment, which directs you to a page where you can enter your payment information.

> *Note: If any booking component is not in Confirmed status, you cannot apply a payment or send a payment link.*

CAN I SEND A PAYMENT LINK?

Yes. In addition to sending a payment link from the Booking Details page, both the Full View and the Invoice View include a Payment Summary Card with a built-in payment link. When you send either view to a client, the email will contain a link to the document, allowing the client to use the "*Make a Payment*" button on the Payment Summary Card.