

# UNIVERSAL STUDIOS BOOKING PROCESS CHECKLIST

EverSail Travel • Agent Training & Workflow Reference



## Universal Studios Booking Process Checklist

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Use this checklist to guide clients proactively through booking, promotions, extra-booking windows, final payment, trip preparation, and post-vacation follow-up.

#### 1. Book the Reservation on Vax & Send the Vacation Guide

**When:** when your client is ready to book

To book the vacation, collect the following information:

- First and last names
- Titles (Mr., Miss, etc.)
- Ages
- Whether or not to add vacation protection at booking
- Billing address
- Credit card information for the deposit
- Client phone number
- **Note:** When booking in Vax, enter your email address in the client email field so you receive the confirmations and can forward them to the client.

#### 2. Apply New Promotions as They Drop

**When:** anytime between when your client books and travels

If a new promotion becomes available, check whether it applies to your client.

- **Retrieve the reservation** in Vax.
- **Scroll to the itinerary tools** and select the Modifications tab.
- **Select “Change Components”** and add the new sale-price component.
- **Check out** to save the new price.
- **Send your client a text or email** letting them know they saved money.

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### 3. Offer to Book Extras for Your Client

**When:** 6 months before check-in

You can offer to book extras for the client, including:

- Dining reservations
- Special experiences
- Equipment rentals
- Airport transfers
- Stroller rentals, and more
- Dining reservations can be made through the Universal Dining Reservations page.
- Some special experiences may have different opening deadlines, such as Grinchmas Breakfast. **Note** what your client wants, determine when reservations open, and set a reminder to book.

**EverSail Agent Tip:** Keep promotion dates, payment deadlines, extra-booking windows, and client follow-ups on your calendar.

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### 4. Make Your Client’s Final Payment

**When:** 45 days before check-in for vacation packages

- **Reach out to your client** 10 days before the final payment date to gather their payment information.
- **Send reminders** by text and email if you don’t hear from them.
- **Retrieve the reservation in Vax** and process the final payment.

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### 5. Have Final Consultation with Client

**When:** 5–6 days before check-in

- Conduct the final consultation by phone, text, or email.
  - Make sure the client feels prepared and has no remaining questions.
  - For vacation packages, remind clients that they receive their tickets at hotel check-in.
  - Review Express Pass logistics if necessary.
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## 6. Post-Vacation Check-In & Ask for a Review

**When:** check-out day

- Share the link for the client to leave a Google review.
- Ask your clients about their trip and experience.
- Ask what they would like to book next.

**EverSail Travel Standard:** Guide clients proactively through booking, promotions, extra-booking windows, final payment, trip preparation, and post-vacation follow-up.