



DISNEY CRUISE LINE

BOOKING PROCESS CHECKLIST

EverSail Travel • Agent Training & Workflow Reference

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Use this checklist to guide clients through each important milestone, from booking and payment to check-in, embarkation, and post-cruise follow-up.

1. Book the Reservation & Send the Vacation Guide

When: your client is ready to book

- Book the client's cruise reservation in DTA, then send the appropriate vacation guide.
- Collect each guest's first and last name, preferred title, date of birth, gender, and country of citizenship.
- Collect the lead guest's home address, email address, and phone number.
- Confirm whether the client wants vacation protection at booking.
- Confirm the preferred dining time and whether the client wants to be waitlisted if unavailable.
- Collect credit card information for the deposit.

2. Watch for New Promotions & Apply Eligible Savings

When: anytime between booking and the sail date

- Watch for Disney promotions communicated to travel advisors, including promotional emails from Disney sales.
 - If a promotion applies: retrieve the reservation in DTA → modify the reservation → apply the eligible offer → complete checkout to secure the new pricing.
 - Notify the client promptly and explain the savings.
 - If an existing reservation requires a phone call to apply the offer, contact the appropriate advisor support/agency line and complete the promotion update.
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3. Process the Client's Final Payment

When: 90 or 120 days before sailing, depending on cruise length

- Reach out approximately 10 days before the final-payment deadline to gather payment information.
 - Send follow-up reminders by text or email if you do not hear back.
 - Retrieve the reservation in DTA and process the payment.
 - Confirm whether the client wants to add vacation protection before the applicable deadline.
 - **Important:** Clients cannot process payments themselves, including the final payment.
 - This is also a good time to confirm pre-cruise hotels, transfers, or prepaid gratuities.
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4. Prepare & Help Clients Book Excursions and Extras

When: 75–130 days before sailing, depending on Castaway Club status or Concierge

- **Concierge:** Help the client prioritize excursions, activities, and other extras. Prepare the request list and submit eligible requests to the Concierge team at the applicable booking window.
- Follow up once the Concierge team confirms what was successfully booked.
- **Non-Concierge:** Either book eligible excursions/activities through DTA or prepare the client to make reservations themselves.
- **Important:** Availability can go quickly. Encourage clients to be online and ready when their booking window opens.
- Review cancellation and payment terms for activities.

EverSail Agent Tip: Add every important DCL booking window to your follow-up calendar as soon as the cruise is booked.

5. Prepare Your Client for Online Check-In

When: 30–40 days before the sail date

- Make sure the client knows how and where to complete online check-in.
- Confirm their check-in date and remind them that the check-in window opens at the applicable time shown by Disney Cruise Line.
- Remind them to have the required travel documents ready, such as a passport or an original state-issued birth certificate with the required seal, when applicable.
- Explain Port Arrival Time selection when applicable and encourage prompt check-in.
- Earlier completion may provide access to earlier available arrival times, subject to itinerary, Concierge status, transportation, and other priority rules.
- **Important:** Agents cannot complete check-in for clients when the process requires the client to review and sign legal cruise documents.

6. Help Clients Prepare to Book the Royal Gathering

When: 30 days before the sail date

- Royal Gathering can be booked through the available DCL reservation channels at the applicable booking window.
- Reservations may be available through the DCL Navigator App or DTA, depending on the sailing and current system setup.
- If the client's online check-in window opens around the same time, recommend prioritizing Royal Gathering first when appropriate so the client can focus on check-in.
- Many agents offer to handle the Royal Gathering reservation so the client can concentrate on other check-in steps.

7. Complete the Final Vacation Consultation

When: 5–6 days before the client travels

- Have a final consultation by video, phone, email, or text.
 - Make sure the client feels prepared and answer any last-minute questions.
 - Remind them to bring the required travel documents; without proper documents, they may not be permitted to board.
 - Explain the DCL Placeholder offer they may see in the DCL app while onboard, if applicable.
 - Remind clients to attach DCL luggage tags on embarkation day after they receive their luggage from the airport, when applicable.
 - If tags are lost or never received, let the client know they can request replacements at the port.
 - Share final logistics and practical embarkation-day tips.
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8. Post-Cruise Follow-Up & Request a Review

When: the afternoon or evening of the day the client disembarks

- Send a friendly follow-up message and check in on how the cruise went.
- Share the EverSail Travel review link and invite the client to leave a Google review for your service.
- Ask about their favorite parts of the trip and use personalized details when following up.
- Ask what destination or cruise they would like to experience next.

EverSail Travel Standard: Guide clients through every important milestone—from booking and payment to check-in, embarkation, and post-cruise follow-up.