How to Use Booking Forms

Some helpful tips on how to use your booking forms:

WDW / DL

_____ **Name**   Conf. #_____

Address		City and Zip

Phone	Reservation Amount	Commission	My Portion	PMT Date

Email	Disney Resort / Room Type	Dates Booked
@	Hotel:	Check in:
	Room Type:	Check out:

Memory Maker/ Max Pass	Park Tickets Length	Hopper Tickets	Dining Package
YES NO Maybe		YES NO	

Dining Booking Date:	Magic Express Last Day	Penalty Free Cancel Ends	Paid in Full Due
☐	☐		☐
√ box when booked	√ box when booked		√ box when paid in full

Disney Genie +	Magic Band Cust. Date	Special Needs	Travel Insurance
YES NO Maybe ☐		YES_____ NO	YES NO POI
	√ box if purchased	List disabilty if applicable	POI (planning on it)

All Attending (ages of children at time of vacation)

_____   _____
_____   _____
_____   _____
_____   _____

Note: (desired room location / special needs such as handi cap bathroom / diatary needs)

Celebrating anything?

Disney Experience Log In Info:

Getting There Questions			
Driving Flying	Airline:		Conf #:
Flight #_____ from _____ to _____		Flight #_____ from _____ to _____	
Takeoff _____ am pm	Landing _____ am pm	Takeoff _____ am pm	Landing _____ am pm

Park Reservations Made ☐ | Dates on Calendar ☐ | Input in CRM ☐ | On Commission Log ☐
New Client Emails Sent ☐ | Email Logged ☐ | New Booking Mailer Sent ☐
Special Needs Info Sent ☐ | 60 Day Out Mailer Sent ☐ | Room Gift Sent ☐ | Thank you Card Sent ☐

If they are traveling with another party I always put a red highlight line right above Conf. #. That alerts me to pull multiple bookings when looking at it. I mark all of those traveling together with the red highlighted line.

Be sure to circle which parks they are attending. Walt Disney World in Florida or Disneyland in California.

When I check a box I always write the date I completed that task above it. Just helps me validate that it was done and when.

The important of "POI" and "Maybe" is to remind us to remind our clients that they were considering purchasing it.

These should be checked off as they are done. These will become life savers once you start booking over 400k a year!

This form should be filled out as soon as a client books. Then the information should be put into the CRM (website we log our booking into so we can get paid). Once the form is filled out, and the information is both in the CRM and on your desk calendar then you should file it in your binder under the travel month.

CRAZY ABOUT Vacations

Other Tips for Forms

WDW / DL

_____ **Name**   **Conf. #**_____

Address	City and Zip

Phone	Reservation Amount	Commission	My Portion	PMT Date

Email	Disney Resort / Room Type	Dates Booked
@	Hotel:	Check in:
	Room Type:	Check out:

Memory Maker/ Max Pass	Park Tickets Length	Hopper Tickets	Dining Package
YES NO Maybe		YES NO	

Dining Booking Date:	Magic Express Last Day	Penalty Free Cancel Ends	Paid in Full Due
☐	☐	☐	☐
√ box when booked	√ box when booked		√ box when paid in full

Disney Genie +	Magic Band Cust. Date	Special Needs	Travel Insurance
YES NO Maybe	☐	YES_____ NO	YES NO POI
	√ box if purchased	List disabilty if applicable	POI (planning on it)

All Attending (ages of children at time of vacation)

_____   _____
_____   _____
_____   _____
_____   _____

Note: (desired room location / special needs such as handi cap bathroom / diatary needs)

Celebrating anything?

Disney Experience Log In Info: email@email.com   /   passWord1203

Getting There Questions

Driving Flying	Airline:	Conf #:
Flight #_____ from _____ to _____	Flight #_____ from _____ to _____
Takeoff _____ am pm	Landing _____ am pm	Takeoff _____ am pm	Landing _____ am pm

Park Reservations Made ☐ | Dates on Calendar ☐ | Input in CRM ☐ | On Commission Log ☐
New Client Emails Sent ☐ | Email Logged ☐ | New Booking Mailer Sent ☐
Special Needs Info Sent ☐ | 60 Day Out Mailer Sent ☐ | Room Gift Sent ☐ | Thank you Card Sent ☐

Besides their names here you can also list their birthdates which you will need for cruises along with cruise rewards numbers. That way once they travel you can have that info hand in their file for hopefully many more future bookings!

I use a / to divide sign in name from password. To better help me read my own handwriting I underline under capital letters and put lines thorough zeros to diffrenciate between the number zero, and letter O.

Having the landing and take off times are important when planning. It is up to you to request early check in if they get in before 3pm and move dining reservations around if they are arriving too late. Your client will not even think to check most of the time. It is our job to think ahead for them.

Other Tips for Forms

This section is a great for notating confirmation numbers for transportation, tickets, and more.

I always notate in this section the costs of insurance, transportation fees, hopper tickets, and more… even if they decline or remain undecided. The reason I do this is because more often than not they will ask it is far easier to look up their files vs logging in online and finding the info.

VERY IMPORTANT:
Always keep notes on the back of the booking form of your calls to customer support and other important conversations. This is very important because customer service LIES all the time and if we need to have a call pulled to validate something they told you we need the date of the call, time, and name of the representative. Also it is great to notate things like:
"left a message on 1/5/22 at 1:45pm regarding their pay in full being due".
"Mr. Jones called and said to remove Memory Maker 1/5/22"
"1/5/22 – 1:45pm – WDW Cassie – added an extra park day"

Post it notes are the most useful thing you can use with the booking forms besides white out. Anytime a client needs something it is super useful to write it down on the post it and stick it to their file. This way you will not forget, this way the note will not be lost, and it is quick and easy.

Other Tips:
We never put a file in the binder IF it has a sticky on it because that sticky means that client needs something. Some agents use folders to hold files being "worked" on, some use clip boards, some use file holders, and others use a giant paper clip. Everyone is different. How I personally do it:

Giant paper clip holds my files being worked on today

Red folder holds files (left side for those needing park reservations and ride side for those needing planning emails sent)

Clip board holds clients on vacation so I have them handy if needed and ready to mail a thank you card.