



Travel Agency Booking Modification Support Checklist 2026

Initial Inquiry Verification

Verify passenger identity, booking reference numbers, and the original itinerary details to ensure the correct reservation is being accessed.

Customer Full Name

Write something...

Booking Reference (PNR)

Write something...

Original Departure Date

Enter date...

Inquiry Source

- ☐ Email
- ☐ Phone Call
- ☐ Live Chat
- ☐ Mobile App

Original Itinerary Copy

 Upload File

Modification Request Assessment

Analyze the specific changes requested (dates, destinations, or passenger count) and check for compatibility with existing airline/hotel policies.

Type of Modification Requested

- ☐ Date Change
- ☐ Destination Change
- ☐ Passenger Addition/Removal
- ☐ Class/Seat Upgrade
- ☐ Ancillary Service Update (e.g., Meal, Baggage)

Detailed Description of Requested Changes

Write something...

New Requested Departure Date

Enter date...

New Requested Return Date

Enter date...

Affected Travel Components

- ☐ Flights
- ☐ Accommodation
- ☐ Car Rental
- ☐ Rail/Train
- ☐ Travel Insurance

Supporting Documents (e.g., Visa changes, Medical Certificates)

 Upload File

Policy & Fee Compliance Check

Review airline fare rules, hotel cancellation windows, and agency-specific modification fees or penalties applicable to the new request.

Applicable Modification Policy Type

- ☐ Fully Refundable
- ☐ Non-Refundable / Change Fee Applicable
- ☐ Partial Refund Allowed
- ☐ No Changes Permitted

Calculated Modification Fee

Enter a number...

Deadline for Change Submission

Enter date...

Checked Compliance Requirements

- ☐ Airline Fare Rules Verified
- ☐ Hotel Cancellation Window Confirmed
- ☐ Visa/Entry Requirements Re-verified
- ☐ Travel Insurance Coverage Validated

Policy Documentation/Screenshot

 Upload File

Detailed Fee Breakdown Notes

Write something...

Availability & Re-booking Execution

Search for real-time availability for new flight segments, hotel stays, or ground transportation and initiate the re-booking process.

New Flight/Segment Status

- ☐ Confirmed
- ☐ Waitlisted
- ☐ Unavailable

New Departure Date

Enter date...

New Return Date

New Flight/Hotel Reference Number

Re-booking Notes & Discrepancies

New Itinerary Screenshot/PDF

 Upload File

Cost Impact & Payment Processing

Calculate the total difference in fare, taxes, and agency service fees, and secure authorization for additional payments from the client.

Additional Fare Difference

Agency Service Fee

Payment Method Used

- ☐ Credit Card
- ☐ Bank Transfer
- ☐ Agency Credit/Voucher
- ☐ PayPal

Payment Authorization Notes

Write something...

Payment Receipt/Proof of Transaction

 Upload File

Client Payment Authorization

Documentation & Confirmation Update

Generate new e-tickets, updated vouchers, and revised itineraries, ensuring all digital and physical copies are sent to the traveler.

New Booking Reference Number

Write something...

Date of Modification Execution

Enter date...

Updated Document Type

- ☐ E-Ticket
- ☐ Hotel Voucher
- ☐ Car Rental Confirmation
- ☐ Travel Insurance Amendment

Distribution Channels

- ☐ Client Email
- ☐ Client SMS/WhatsApp
- ☐ Internal CRM Update
- ☐ Supplier Notification

Upload Revised Itinerary PDF

 Upload File

Agent Verification Signature

Client Notification & Closing

Send a final summary of changes and updated terms to the client and update the internal CRM to mark the support ticket as resolved.

Client Email Address

Write something...

Notification Sent Date

Enter date...

Communication Channel Used

- ☐ Email
- ☐ Phone Call
- ☐ WhatsApp/SMS
- ☐ Client Portal

Documents Attached to Notification

- ☐ Updated E-Ticket
- ☐ Revised Hotel Voucher
- ☐ Updated Trip Itinerary
- ☐ New Invoice/Receipt

Internal Notes for Modification Summary

Write something...

Agent Verification

< Previous

> Next

✔ Finish

✎ Generate Sample Report