

# Guía - Crear Planning Deal

La finalidad de esta guía es compartir un poco el proceso de llenado de la tarjeta de Turn Over (Weddings) para la creación del Deal en el Pipeline de Planning.

Última actualización: 29 de jul. de 2025

## 1 Dirigirnos a Deals

Debemos buscar el pipeline de Weddings y filtrar por los deals que se encuentren en status "Won".

## 2 Seleccionar Deal

Una vez filtrado los deals en status Won del pipeline de Weddings, debemos seleccionar el deal al cual queremos llenar la tarjeta Turn Over más adelante.

TOTAL DEAL AMOUNT		WEIGHTED DEAL AMOUNT		OPEN DEAL AMOUNT		CL
<b>\$47.19M</b>		<b>\$45.65M</b>		<b>\$2.98M</b>		
Average per deal: \$50.57K		Average per deal: \$48.93K		Average per deal: \$52.22K		Aver
Search name or descript 🔍						
<input type="checkbox"/>	DEAL NAME		DEAL STAGE		TRACKING NUMBER	
<input type="checkbox"/>	<a href="#">We Demo</a>	Preview	Won (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Herda/Elfman</a>		Lead (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Fisher/Montgomery</a>		Lead (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Jonas/Salmon</a>		Lead (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Salazar/Orozco</a>		Lost (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W MACIAS /SANCHEZ</a>		Lead (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Marticorena/Cecilio</a>		Lead (Weddings Pipeline)		--	
<input type="checkbox"/>	<a href="#">W Knudsen/Ramos</a>		In Process (Weddings Pipelin...		--	
<input type="checkbox"/>	<a href="#">W Cash/Moulton</a>		Lead (Weddings Pipeline)		--	

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## Validar Contacto Asociado

Una vez entrado al Deal, tenemos que validar si se encuentra ya asociado a un Contacto. Si ya se encuentra asociado debemos saltarnos al paso 8. De lo contrario debemos seguir los siguientes pasos

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## Hacer click en agregar contacto

Al hacer click en ese boton, Hubspot nos va a pedir que creamos un contacto o que lo asociemos a uno existente. Para nuestro proceso vamos a seleccionar agregar uno existente por medio del correo electronico.

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## Seleccionar al Contacto

The screenshot shows the HubSpot interface with the 'Add existing Contact' dialog box open. The dialog has a search bar containing 'javina@the' and a list of contacts. The contact 'Javier Mauricio Aviña (javina@thepalacecompany.com)' is selected. The 'Next' button is highlighted in orange.

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## Hacemos click en siguiente/Next

Botón Naranja en la esquina inferior derecha

The screenshot shows the HubSpot interface with the 'Add existing Contact' dialog box open. The dialog has a search bar containing 'javina@the' and a list of contacts. The contact 'Javier Mauricio Aviña (javina@thepalacecompany.com)' is selected. The 'Next' button is highlighted in orange.

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## Hacemos click en siguiente/Next

Botón Naranja en la esquina inferior derecha. Y con esto ya habremos asociado el Deal a un contacto.

The screenshot shows the HubSpot interface with a modal window titled "Add existing Contact". The modal contains a "Create new" button and an "Add existing" button. Below these buttons, there is a section for "Association Labels" with a dropdown menu showing "Javier Mauricio Aviña (javina@thepalacecompany.com)". At the bottom right of the modal, there is a "Save" button in orange, which is the button mentioned in the text.

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## Click on Bride

Tenemos que llenar o actualizar el campo de Bride

The screenshot shows the HubSpot interface with the "Wedding Demo" deal page. The "Bride" field is highlighted with a white circle, indicating it is the field to be updated. The right side of the screen shows the "Upcoming" section with a task assigned to Javier Mauricio Aviña Pech.

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## Click on Groom

Tenemos que llenar o actualizar el campo de Groom

The screenshot shows a CRM interface with two main panels. The left panel, titled 'Turn over', contains a form with the following fields: Ceremony Date (07/30/2025), Bride (TEST), Groom (highlighted with a white circle), Type of ceremony, Attendees, Room nights, Complementos/Fees, Special Request, and BlockCode BB Ceremonia. The right panel, titled 'Upcoming', shows a task assigned to Javier Mauricio Aviña Pech with the message 'Hola Javier Mauricio Aviña Pech, tienes un nuevo lead'. It includes due date (Today, 5:21 PM), reminder (07/29/2025, 6:00 AM), and a table with columns: Type (To-do), Priority (High), Queue (None), and Assigned to (Javier Mauricio Aviña Pech). Below the table, it says 'Tienes un nuevo lead, es hora de validar su perfil: Wedding Demo.' and has an 'Add comment' button. At the bottom, a 'List membership' section indicates 'Wedding Demo was removed from Negocios Weddings'.

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## Click on Type of ceremony

Tenemos que llenar o actualizar el campo Type of Ceremony

This screenshot is identical to the previous one, but the white circle now highlights the 'Type of ceremony' field in the 'Turn over' card. The rest of the interface, including the 'Upcoming' task card and the 'List membership' section, remains the same.

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## Click on Attendees

Tenemos que llenar o actualizar el campo Attendees

Ceremony Date  
07/30/2025

Bride  
TEST

Groom  
TEST

Type of ceremony  
Catholic Weddings

Attendees

Room nights

Complementos/Fees

Special Request

BlockCode BB Ceremonia

Resorts

Task assigned to Javier Mauricio Aviña Pech

Hola Javier Mauricio Aviña Pech, tienes un nuevo lead

Due date  
Today 5:21 PM

Reminder  
07/29/2025 6:00 A

Type	Priority	Queue	Assigned to
To-do	High	None	Javier Mauricio Aviña Pech

Tienes un nuevo lead, es hora de validar su perfil: Wedding Demo.

Add comment

July 2025

List membership  
Wedding Demo was removed from **Negocios Weddings**

Deal activity  
Javier Mauricio Aviña Pech moved deal from Lead to Won. [View d](#)

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## Click on Room nights

Tenemos que llenar o actualizar el campo Room Nights

Ceremony Date  
07/30/2025

Bride  
TEST

Groom  
TEST

Type of ceremony  
Catholic Weddings

Attendees  
2

Room nights

Complementos/Fees

Special Request

BlockCode BB Ceremonia

Resorts

Task assigned to Javier Mauricio Aviña Pech

Hola Javier Mauricio Aviña Pech, tienes un nuevo lead

Due date  
Today 5:21 PM

Reminder  
07/29/2025 6:00 A

Type	Priority	Queue	Assigned to
To-do	High	None	Javier Mauricio Aviña Pech

Tienes un nuevo lead, es hora de validar su perfil: Wedding Demo.

Add comment

July 2025

List membership  
Wedding Demo was removed from **Negocios Weddings**

Deal activity  
Javier Mauricio Aviña Pech moved deal from Lead to Won. [View d](#)

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## Click on Complementos/Fees

Tenemos que llenar de manera opcional el campo de Complementos/Fees

The screenshot shows a CRM interface with a lead card on the right and a sidebar on the left. The lead card displays the following information:

- Lead Status:** ✓ Hola Javier Mauricio Aviña Pech, tienes un nuevo lead
- Due date:** Today 5:21 PM
- Reminder:** 07/29/2025 6:00
- Details:**
  - Type: To-do
  - Priority: High
  - Queue: None
  - Assigned to: Javier Mauricio Aviña Pech
- Activity:** Tienes un nuevo lead, es hora de validar su perfil: Wedding Demo.
- Buttons:** Add comment

The sidebar on the left shows the lead's details, including the date 07/30/2025, name (Bride: TEST, Groom: TEST), and various fields. A white circle highlights the 'Complementos/Fees' field, which is currently empty. A red circle with the number '10' is positioned at the bottom left of the sidebar.

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## Click on BlockCode BB Ceremonia

Tenemos que llenar o actualizar el campo de BlockCode BB Ceremonia

This screenshot is identical to the previous one, showing the same lead card and sidebar. However, a white circle highlights the 'BlockCode BB Ceremonia' field in the sidebar, which is currently empty. A red circle with the number '3' is positioned at the bottom left of the sidebar.

## 15 Click on Turn Over

Esta es una actualización, ahora cuando todos los campos de la tarjeta Turn Over, debemos marcar la casilla de Turn Over como Yes

The screenshot shows the Salesforce HubSpot interface. On the left, a sidebar lists various sections like 'Deals', 'Weddings Sales', and 'Turn over'. The main area displays a task assigned to Ana Ramos with a due date of 07/31/2025 at 9:55 AM. The task description includes a message in Spanish: 'Hola Ana Ramos, tienes un nuevo lead'. Below the task, there are workflow activity logs. On the right, a panel shows contact information for Ateet Ahuja and a list of associated deals, tickets, and companies.

## 16 Hacemos refresh a la pagina

Habiendo llenado todos los campos antes mencionados a excepción del Complementos/Fees (opcional) el deal de Planning se debe crear en automatico

## 17 Deal - Planning Creado

The screenshot shows the Salesforce HubSpot interface for a deal. The main view displays the deal details, including the assigned user 'Javier Mauricio Aviña Pech' and the deal owner 'Planning'. The deal is due on Jul 29, 2025 at 5:21 PM CST. On the right, a panel shows contact information for +52-98-11-382666 and a list of associated deals, tickets, and companies. A 'Preview' button is visible next to the deal entry.