P PRESTIGIA MEXICO — CLOUDNSITE

HubSpot Phase 1 User Guide

A beginner-friendly walkthrough for Brandon and the Prestigia team: learn where everything lives, how to add a client, create a trip, connect services and partners, use reports, and verify the Phase 1 build.

PORTAL **51216875**	AUDIENCE **Brandon / Prestigia**
REVIEW TIME **60-90 minutes**	PREPARED **May 13, 2026**

No HubSpot experience needed.

SELF-AUDIT

This guide assumes you have never used HubSpot before. It shows exactly where to click, what each area means in Prestigia terms, and how to confirm the system is ready. Open HubSpot in another tab and follow along.

↓ Download full workbook

↓ Download PDF guide

01 — START HERE

This guide shows how to use the system, not just audit it

Brandon asked for a document that shows how to use HubSpot as if everything is new. That is exactly what this is. It starts with where to click when you first log in, walks through adding a client, creating a trip, booking services, and reading your reports. The verification checklist at the end lets you confirm everything works.

> **Recommended setup: open this guide in one browser tab and HubSpot portal 51216875 in another tab. Work through the sections in order. Your checklist progress saves automatically so you can close the page and come back.**

1. Log in
2. Learn the map
3. Add a client
4. Create a trip
5. Check reports
6. Submit review

02 — PROGRESS TRACKER

Your progress saves as you go

Reviewer name

Brandon Heller

Each pass/follow-up decision and note saves to CloudNSite as you work. If you leave and come back, this page reloads your saved progress.

0 of 12 audit checks complete.

Connecting to review tracker...

When finished

After all checks are complete, choose a final decision at the bottom and click **Submit completed review**. That locks the review so CloudNSite can see it is done.

Review ID: phase1-verification-2026-05-13

Download the full workbook

Use this if you want the complete supporting evidence workbook alongside the guided review.

↓ **Full evidence workbook (.xlsx)**

↓ **Printable PDF guide**

03 — FIRST LOGIN

Your first 5 minutes in HubSpot

If you have never opened HubSpot before, this section shows you the basic layout so you are not lost when the walkthrough starts.

How to log in

1. Go to **app.hubspot.com** in your browser.
2. Sign in with the email and password associated with the Prestigia Mexico account.
3. If you see multiple portals/accounts, choose **Prestigia Mexico** (portal ID **51216875**). You can verify the portal ID in the URL bar — it will show `/51216875/` in the address.

The top navigation bar

Once you are logged in, the top of the screen has a dark navigation bar. This is how you move between the main areas of HubSpot. Here is what the key menus contain:

CRM
Contacts, Companies, Deals, Tickets

CRM > Deals
This is where your trips live

Reporting
Dashboards, Reports

Sales
Products, Quotes

Marketing
Forms, Email

CRM menu is your most-used menu. Hover over it and you will see dropdowns for **Contacts** (your clients), **Companies** (your vendors and partners), and **Deals** (your trips). Click any of these to go to that area.

Reporting > Dashboards is where you see your operating reports and charts. This is the Monday morning destination.

Search bar at the top center lets you search for any record by name, email, or phone number. Use this when you know who or what you are looking for.

How records work (the basics)

Everything in HubSpot is a **record**. A Contact is a record. A Deal is a record. A Company is a record. When you open any record, you see:

1. **Left column:** The record's properties (fields with data like name, email, dates, amounts).
2. **Center column:** Activity timeline — notes, emails, calls, and tasks related to this record.
3. **Right column:** Associations — other records connected to this one. For example, a Deal shows its associated Contacts, Companies, and Line Items here.

Key concept: Records are connected to each other through **associations**. A trip (Deal) is associated with a client (Contact), a villa (Villa), and services (Line Items). When you open a Deal, you can see and click through to all the connected records in the right column.

04 — GLOSSARY

Prestigia language to HubSpot language

HubSpot uses generic CRM terms. Here is what each term means for Prestigia so nothing feels foreign.

WHAT YOU CALL IT	HUBSPOT CALLS IT	WHERE TO FIND IT
A trip or booking	Deal	CRM > Deals > Trip Lifecycle pipeline
A client or guest	Contact	CRM > Contacts
A vendor, venue, or partner	Company	CRM > Companies
A booked service (chef, boat, DJ, etc.)	Line Item	Inside a Deal record, in the Line Items card
The service catalog / menu	Product	Sales > Products (or search Products)
A villa or property	Villa (custom object)	CRM > Villas, or from a Deal association
Trip stage (inquiry, booked, active, etc.)	Deal Stage	On the Deal record, pipeline stage bar at top
Revenue / what the guest pays	price_mxn_num	Line Item properties, rolled up to the Deal
What you pay the vendor	vendor_cost_mxn_num	Line Item properties, rolled up to the Deal
Your profit on a trip	gross_margin_mxn_calc_num	Deal properties (revenue minus cost)
Guest intake form	Form	Marketing > Forms

WHAT YOU CALL IT	HUBSPOT CALLS IT	WHERE TO FIND IT
Monday operating view	Dashboard	Reporting > Dashboards

05 — THE CRM MAP

How everything connects

Think of HubSpot as a set of connected folders. The Deal (trip) is at the center. Everything else connects to it so the team can operate the trip and report on it.

TRIP

Deals

Each trip, booking, or opportunity is a Deal. This holds the pipeline stage, dates, villa, payment status, and financial rollups (revenue, cost, margin, tips, commission). **This is the record you will use most.**

PEOPLE

Contacts

Clients and guests are Contacts. This holds email, phone/WhatsApp, language, guest details, allergies, medical notes, emergency contacts, and consent status. A Contact gets associated to a Deal so the trip knows who the guest is.

PARTNERS

Companies

Vendors, venues, affiliates, and travel partners are Companies. Keeping providers separate from clients makes reporting clean. Examples: Mango Deck, Casa Malca, a transport company.

SERVICES

Line Items + Products

Products are the service menu (the catalogue of things you offer — boats, chefs, photographers, etc.). **Line Items** are the actual services booked on a specific trip, with price, cost, vendor, currency, and payment status.

PROPERTIES

Villas

Villas are a custom object with identity, capacity, owner/ops, and confidence details. They are separate from Companies so property data does not get mixed with vendor data. There are 28 villas (full Tulum + Los Cabos roster).

REPORTING

Dashboards

Dashboards display charts and tables built from Deals, Line Items, Contacts, Companies, Products, and Villas. If a report looks wrong, the fix is usually on the source record (the Deal or Line Item), not the dashboard itself.

06 — STEP-BY-STEP GUIDE

How to use the CRM step by step

This section walks through the tasks Prestigia will do every day. Follow along in HubSpot as you read each step.

01

Find your way around

The main areas you will use are Deals, Contacts, Companies, Products, and Dashboards.

1. In the top navigation bar, hover over **CRM**. A dropdown appears with Contacts, Companies, Deals, and Tickets.
2. Click **Deals** to see all trips. At the top of the Deals page, make sure the pipeline selector says **Trip Lifecycle** (not "Sales Pipeline").
3. To find a specific person: hover over **CRM** and click **Contacts**. Or use the **search bar** at the top of the screen and type a name, email, or phone number.
4. To find a vendor or venue: hover over **CRM** and click **Companies**.
5. To see reports: hover over **Reporting** and click **Dashboards**. You will see the two dashboards built for Phase 1.
6. To see the service menu: hover over **Sales** and click **Products**.
7. To see intake forms: hover over **Marketing** and click **Forms**.

Beginner rule: if the work is about a trip, start from the Deal. The Deal is the center of the system. Everything else (clients, services, vendors, villas) connects to it.

02

Add a new client (Contact)

When a new guest or client reaches out, create a Contact record for them. You can also do this while creating a Deal.

1. In the top nav, hover over **CRM** and click **Contacts**.
2. Click the orange **Create contact** button in the upper right corner.
3. A panel slides open on the right side. Fill in the basics: **First name**, **Last name**, **Email**.
4. Add their **Phone number** (this is also their WhatsApp number in most cases).
5. Scroll down in the create panel to find Prestigia-specific fields. Look for properties under the **prestigia** group: preferred language, guest count, trip details, arrival/departure dates, allergies, medical status, emergency contact.
6. Click **Create** at the bottom of the panel to save.
7. The Contact record opens. You can now associate it to a Deal (trip) using the right sidebar — look for the **Deals** association card and click **+ Add**.

First name | Last name | Email | Phone / WhatsApp | Preferred language

Guest count | Arrival date | Departure date | Allergies / medical

Emergency contact name	Emergency contact phone	Consent status

> **Tip:** You do not need to fill every field when first creating a Contact. Name and email (or phone) are enough to start. Add guest details as they become available. The intake form will also create Contacts automatically once Phase 2 launches the form workflow.

03

Create a new trip (Deal)

Every trip, booking, or opportunity should be a Deal in the Trip Lifecycle pipeline. This is the main record Prestigia works with daily.

1. In the top nav, hover over **CRM** and click **Deals**.
2. At the top of the page, make sure the pipeline dropdown says **Trip Lifecycle**. If it says "Sales Pipeline," click the dropdown and switch.
3. Click the orange **Create deal** button in the upper right.
4. A panel slides open. For **Deal name**, use a clear format like: **Guest Name - Villa / Trip Month** (example: "Martinez Family - Casa Malca / June 2026").
5. Set the **Pipeline** to **Trip Lifecycle** and choose the starting **Deal stage**. For a new inquiry, choose **Inquiry**.
6. In the **Associate with** section of the panel, search for the client Contact you just created and add them.
7. Click **Create** to save the Deal.

8 The Deal record opens. Now add trip details in the left sidebar properties: check-in date, check-out date, guest count, villa name, and any known payment or financial info.

9 The system automatically sets **is_historical_display_only_bool = false** for new Deals, which means it will appear in your live operating reports (not treated as old imported data).

> **Important:** The 1,297 historical deals already in the system are marked as display-only reference data. They will not appear in your live cash reports. Any *new* Deal you create is automatically live operating data, thanks to the workflow built in Phase 1.

Moving a trip through the pipeline

As a trip progresses, update the Deal stage. On the Deal record, you will see a horizontal bar at the top showing all 10 stages. Click the stage you want to move to:

Inquiry **Qualified** **Quoted** **Deposit Received** **Pre-Trip Planning**

Active Trip **Post-Trip** **Closed Won** **Closed Lost** **Cancelled**

04

Add services to a trip (Line Items)

When a guest books a chef, boat, DJ, photographer, or any other service, add it as a Line Item on the Deal. This is how revenue, cost, and margin get tracked per trip.

1 Open the Deal (trip) you want to add services to.

2 On the Deal record, look in the right sidebar or scroll down to the **Line Items** card. If you see a card called **Trip Economics** or **Line Items**, that is the right place.

3. Click **Add line item** or **+ Add**.

4. You have two options: **Select from product library** (choose from the 63 canonical services already set up) or **Create a custom line item** (for one-off services not in the catalogue).

5. If selecting from the library: search by service name or category (e.g., "Chef," "Boat," "DJ"). Click the Product to add it.

6. Fill in the Line Item details: **service category**, **service date**, **guest price (price_mxn_num)**, **vendor cost (vendor_cost_mxn_num)**, **currency** (MXN or USD), and **vendor name** if known.

7. If tips apply to this service, fill in **tip_amount_mxn_num**, **tip_recipient_vendor_name**, and **tip_payout_status**.

8. Click **Save**.

9. Back on the Deal, after a few minutes the rollup fields will update automatically: total revenue, total vendor cost, gross margin, tips owed, and line item count.

Service category | **Service date** | **Guest price (MXN)** | **Vendor cost (MXN)**

Currency | **Vendor name** | **Tip amount** | **Tip recipient** | **Payment status**

> **Note on timing:** HubSpot rollup fields (the automatic sums on the Deal) are not instant. After saving a Line Item, the Deal's revenue, cost, and margin rollups may take **10-15 minutes** to update. This is normal HubSpot behavior, not a bug.

05

Check vendors, venues, and travel partners

Vendors, venues, affiliates, and travel partners are represented as Companies. This keeps provider data separate from guest data.

1. In the top nav, hover over **CRM** and click **Companies**.
2. Search for a vendor or venue name (e.g., "Mango Deck," "Casa Malca").
3. Open the Company record to see vendor category, hospitality group, payment terms, capacity, and other operational details.
4. From a Line Item on a Deal, you can also see which vendor is linked via the **vendor_company_key** or **vendor_raw** fields.
5. If a historical Line Item shows a vendor name that does not match any Company, that is a known Phase 2 cleanup item (169 unmatched Line Items, mostly Antromex). It is not a bug — the vendor raw name is preserved so it can be matched later.

Travel partner commissions

Promoter/affiliate commissions use a separate model called the **Promoter Commission Schedule** (a custom object with 44 rows). This is separate from normal vendor costs. Commission tracking per Line Item uses fields like **commission_amount_mxn_num**, **commission_status**, and **referring_agency** on the Deal.

06

Open and use the reports

Reports live in dashboards. Prestigia has two dashboards built and ready.

1. In the top nav, hover over **Reporting** and click **Dashboards**.

2. You will see a list of dashboards. Click **PMX Phase 1 - Monday Operating Dashboard** for day-to-day operations.

3. Click **PMX Phase 1 - Booking Economics Dashboard** for revenue, cost, margin, and service-level economics.

4. Each dashboard has multiple **tiles** (charts and tables). Click any tile to see more detail or the underlying records.

5. Some tiles have **date range filters**. If a tile looks empty, check whether the date range covers the period you expect (some tiles default to "last 7 days").

6. To refresh a dashboard after entering new data, click the **Actions** button (top right of the dashboard) and choose **Refresh**, or simply reload the page.

> **Reporting rule:** dashboards refresh every ~2 hours automatically. After editing records, the dashboard may not show changes immediately. This is normal HubSpot behavior. If something looks wrong, check the source Deal or Line Item first before assuming the report is broken.

07 — REPORTS

How to answer common questions using the dashboards

Brandon asked how to generate reports. The dashboards are already built – you do not need to create reports from scratch. Here is how to get answers to the most common questions.

QUESTION YOU HAVE	WHERE TO LOOK	STEP BY STEP
How many trips are active or coming up?	Monday Operating Dashboard > Pipeline Funnel tile	Open the Monday dashboard. The **Pipeline Funnel** tile shows a bar chart of deals by stage. Each bar represents how many trips are at each stage of the lifecycle. Click a bar to see those specific deals.
How much revenue did we do this week?	Monday Operating Dashboard > Weekly Booking Economics tile	This table shows deals closed in the last 7 days with their revenue, cost, and margin. If it is empty, it means no deals were closed-won in the past 7 days (which is normal early on).
What is our revenue and margin by villa?	Booking Economics Dashboard > Booking Economics by Villa tile	Open the Booking Economics dashboard. The **by Villa** tile breaks down revenue and cost per villa property. Click into any villa bar to see the underlying deals.
What is our revenue by month?	Booking Economics Dashboard > Booking Economics by Close Month tile	This shows a monthly trend chart. It groups deals by their close date month and shows revenue, cost, and margin per month.
Which services are we booking most?	Booking Economics Dashboard > Line Item Economics by Service Category tile	This table breaks down Line Items by service category (Chef, Boat, Transport, etc.) showing count, revenue, and cost per category.

QUESTION YOU HAVE	WHERE TO LOOK	STEP BY STEP
Are any deals missing cost data?	Monday Operating Dashboard > Missing Cost QA tile	This shows Line Items that have revenue but no vendor cost entered. Use this to identify where you need to enter cost information to get accurate margins.
Are any deals losing money?	Monday Operating Dashboard > Low or Negative Margin Deals tile	This catches deals where cost exceeds revenue. Click into any flagged deal to investigate the Line Items.
What tips are owed this week?	Monday Operating Dashboard > Tip Queue by Recipient tile	This groups owed tips by recipient/vendor. Use this on Monday to see what tip payouts need to happen. See the Monday Routine section for the full process.
Which payment links are pending?	Monday Operating Dashboard > Pending Payment Links tile	Shows deals with pending payment links due in the next 7 days. Use this for collection follow-up.
Do our rollup numbers add up?	Monday Operating Dashboard > Rollup Sanity tile	This is a QA tile. It catches deals where Line Item counts or rollup fields look inconsistent. Check this first thing Monday to confirm data integrity.

About creating new reports: The prepared dashboards cover the standard operating and financial views. If you need a report that is not on the dashboards, let CloudNSite know and we can build it. Creating custom HubSpot reports from scratch is an admin function — you should not need to do it for normal operations.

08 — MONDAY ROUTINE

What to do every Monday morning

This is the recommended weekly operating cadence for Brandon and Bella. Open the Monday Operating Dashboard and work through these steps in order. Takes about 20-30 minutes.

1

Refresh the dashboard

Open Monday Operating Dashboard. Click **Actions > Refresh** or reload the page to pull fresh data.

2

Check rollup sanity

Look at the **Rollup Sanity - Line Item Coverage** tile first. If live deals are showing missing rollups right after data entry, wait 10-15 minutes before treating it as a data problem — HubSpot rollups are not instant.

3

Review the pipeline funnel

Check the **Pipeline Funnel** tile to see how many trips are at each stage. Look for anything stuck in an unexpected stage.

4

Review weekly booking economics

Check the **Weekly Booking Economics** tile for any deals closed in the last 7 days. Confirm revenue, cost, and margin look reasonable.

5

Review pending payment links

Check the **Pending Payment Links** tile. This shows payment links due in the next 7 days. **Bella:** Follow up on any overdue or upcoming payments.

6

Process tip payouts

Check the **Tip Queue by Recipient** tile. **Bella:** Prepare the tip payout list grouped by vendor/recipient. **Brandon:** Approve payouts. After paying, Bella updates each Line Item: set **tip_payout_status**, **tip_payout_method**, **tip_paid_at**, and **tip_payout_batch**. Always update the Line Item, not the Deal rollup — the Line Item is the source of truth.

7

Process commissions

Check the **Commission Queue by Referring Agency** tile. **Brandon:** Review accrued commissions, approve/pay outside HubSpot, then update **commission_status** and **commission_paid_at** on the Line Items.

8

Review stale or stuck deals

Look for any deals that have been sitting in the same stage for too long. Open them, check notes, and decide if action is needed or if the stage should be updated.

9

Bella's follow-up list

After the main review: follow up on overdue payment links, clean up missing vendor costs, review tips-owed data, and handle any villa data cleanup flagged during the review.

09 — SCOPE BOUNDARY

What counts as Phase 1 acceptance

Phase 1 scope (what you are verifying)

HubSpot CRM foundation: schema, properties, pipeline, record layouts, historical data import, dashboards, saved views, intake forms, Products catalogue, Villa object, Promoter Commission Schedule, one live Deal workflow, and operator documentation.

Not Phase 1 (do not block sign-off for these)

Custom React intake form, WhatsApp AI automation, on-submit backend workflows, SLA escalations, full vendor normalization backlog, privacy page publishing on Squarespace, and any other Phase 2 automation.

How to judge edge cases

If the item blocks basic CRM structure, data visibility, or reporting inputs — it is a Phase 1 correction. If it is deeper automation, custom UX, or operational expansion — it is Phase 2.

10 — DIRECT LINKS

Direct links to key HubSpot pages

Click any link below to go directly to that area of HubSpot (you must be logged in to portal 51216875).

Monday Operating Dashboard

Pipeline, weekly economics, tips, commissions, payment links, QA tiles.

Booking Economics Dashboard

Revenue, cost, margin by villa, by month, and by service category.

Deals (Trips)

All trips in the Trip Lifecycle pipeline.

Contacts (Clients & Guests)

All client and guest records.

Companies (Vendors & Partners)

Vendors, venues, affiliates, and partner records.

Products (Service Catalogue)

63 canonical services plus 305 historical SKU products.

Forms (Guest Intake)

Prestigia Guest Intake EN and ES forms.

11 — EXPECTED STATE

Numbers and IDs to verify against

ITEM	EXPECTED VALUE	NOTES
Portal	51216875	Prestigia Mexico HubSpot portal.
Pipeline	Trip Lifecycle / 894702972	10 stages: Inquiry, Qualified, Quoted, Deposit Received, Pre-Trip Planning, Active Trip, Post-Trip, Closed Won, Closed Lost, Cancelled.
Contacts	1,293 total (1,280 keyed + 13 pre-existing)	Updated after AJ review on 2026-05-11.
Deals	1,297 historical Deals	One pre-existing "Belen Bach Party" Deal is on the default pipeline, intentionally excluded from reporting.
Line Items	1,233 historical Line Items	All flagged display-only and excluded from Phase 1 cash reports.
Companies	80 keyed Companies	Vendors, affiliates, venues, and retained operational companies.
Products	63 canonical + 305 historical = 368 total	Canonical Products have is_canonical_catalog_item=true.
Villa custom object	28 Villa records	Full Tulum + Los Cabos roster.
Promoter Commission Schedule	44 rows	Effective-dated commission rows for 4 agencies.
Dashboards	2 dashboards / 13 tiles verified	Screenshot proof included below.

ITEM	EXPECTED VALUE	NOTES
Forms	2 forms (EN + ES), 77 fields / 31 groups each	Prestigia Guest Intake and Prestigia Guest Intake - ES.
Workflow	1 live workflow (ID 1814035254)	"Phase 1 - Default New Deal Historical Flag" — auto-marks new deals as live, not historical.

12 — PIPELINE STAGES

Trip Lifecycle stage order

This is the pipeline you will use for all trips. The stages go in order from first contact to final resolution.

ORDER	STAGE	STAGE ID	PROBABILITY	TYPE	WHAT IT MEANS
0	Inquiry	1350489672	10%	Open	Guest reached out, no quote yet
1	Qualified	1350489673	20%	Open	Real interest confirmed, gathering requirements
2	Quoted	1350489674	40%	Open	Quote/proposal sent to guest
3	Deposit Received	1350489675	70%	Open	Guest paid deposit, trip is confirmed
4	Pre-Trip Planning	1350489676	75%	Open	Booking services, coordinating vendors
5	Active Trip	1357428606	90%	Open	Guest is currently on-site in Tulum/Cabo
6	Post-Trip	1357428607	95%	Open	Trip ended, collecting final payments, tips, feedback
7	Closed Won	1350489679	100%	Closed	Trip fully completed and settled
8	Closed Lost	1350489680	0%	Closed	Guest decided not to book
9	Cancelled	1350489681	0%	Closed	Trip was booked but then cancelled

13 — VERIFICATION CHECKLIST

Phase 1 verification checklist

Work through each check below. Your decisions and notes save automatically to CloudNSite. When all 12 checks are complete, submit the review at the bottom.

1

Confirm the dashboards load

Open both dashboard links below. You are checking that the dashboards exist, load without errors, and tiles are visible.

1. Click: Monday Operating Dashboard
2. Click: Booking Economics Dashboard
3. Confirm both pages load without permission errors.
4. Confirm you can see tiles (charts and tables). Some tiles may show empty states if no new deals have been created yet — that is normal.

> **Pass if:** Both dashboards open and tiles are visible. **Follow-up if:** A dashboard is missing, blocked by permissions, or a tile is clearly broken.

○ Pass ○ Needs follow-up ○ Not applicable

Optional notes for this check. These save automatically.

NOT CHECKED YET

2

Confirm the Trip Lifecycle pipeline

Open Deals and make sure the Trip Lifecycle pipeline exists with all 10 stages.

1. Go to CRM > Deals.
2. Click the pipeline dropdown at the top and select **Trip Lifecycle**.
3. Confirm you see 10 stages in order: Inquiry, Qualified, Quoted, Deposit Received, Pre-Trip Planning, Active Trip, Post-Trip, Closed Won, Closed Lost, Cancelled.
4. Note: There is one pre-existing deal called "Belen Bach Party" on the default Sales Pipeline. This predates Phase 1 and is intentionally excluded. It is not a defect.

> **Pass if:** Trip Lifecycle pipeline exists with all 10 stages in order. **Follow-up if:** Pipeline is missing or stages are wrong.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

3

Create or inspect a Deal

This proves that new trips enter the system correctly. The strongest check is to create a test Deal. If you prefer not to, inspect an existing recent Deal.

1. Go to CRM > Deals and click **Create deal**.
2. Name it something like "PMX Review Test - Do Not Use."
3. Set Pipeline to **Trip Lifecycle** and Stage to **Inquiry**.
4. Click **Create**, then reopen the Deal.
5. In the left sidebar, look for **is_historical_display_only_bool** — it should be **false**. This confirms the workflow is automatically marking new deals as live data.

> **Pass if:** A new Deal is created in Trip Lifecycle and is_historical_display_only_bool = false.
> **Follow-up if:** The workflow did not set the flag, or you could not create a Deal.

○ Pass ○ Needs follow-up ○ Not applicable

Optional notes for this check. These save automatically.

NOT CHECKED YET

4

Confirm Contacts (client/guest records)

Open a Deal and check that Contacts are associated. Then open one Contact record.

1. On a Deal record, look in the right sidebar for the **Contacts** card.
2. Confirm a client/guest Contact is linked (or that you can link one by clicking **+ Add**).
3. Open the Contact record. Look for Prestigia intake fields: language, phone/WhatsApp, email, guest count, arrival/departure, allergies, medical, emergency contact, consent.
4. Go to CRM > Contacts and confirm you see the full list (expected: 1,293 total).

> **Pass if:** Contacts are the people layer and guest operations fields are visible on the record. Missing details on old historical records are source data gaps, not build defects.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

5

Confirm Companies (vendors and partners)

Check that vendors and venues exist as Company records.

1. Go to CRM > Companies.
2. Search for a known vendor or venue (e.g., a restaurant or transport provider).
3. Open the Company and confirm vendor category, service area, and operational fields are present.
4. Note: 169 historical Line Items have unmatched vendor names (largest cluster: Antromex). These are Phase 2 cleanup, not a Phase 1 defect.

> **Pass if:** Vendors/venues are represented as Companies and unmatched historical vendors remain visible. **Follow-up if:** Companies are missing or inaccessible.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

6

Confirm commission model

Check that travel partner/promoter commissions are modeled separately from normal vendor costs.

1. In Companies, search for affiliate or travel partner examples.
2. If you have access to custom objects, look for the **Promoter Commission Schedule** (44 effective-dated commission rows).
3. Confirm this is separate from normal vendor Companies and Products.

> **Pass if:** Partner/commission data is modeled separately enough to support Phase 2 automation. **Follow-up if:** Commission data is missing or mixed into vendor records.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

7

Confirm Products (service catalogue)

Check that the service menu exists with canonical items.

1. Go to Sales > Products.
2. You should see 368 total products. The 63 canonical ones have **is_canonical_catalog_item = true**.
3. Spot-check a few: look for one Boat service, one Chef service, and one Transport service.
4. Confirm historical SKU-level Products are also present (these are the 305 preserved from the data import).

> **Pass if:** Canonical Products exist covering all service categories and historical Products are preserved. **Follow-up if:** Products page is empty or canonical items are missing.

◯ **Pass** ◯ **Needs follow-up** ◯ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

8

Confirm Line Item economics

Check that revenue, cost, margin, tips, and service details are visible on Line Items and rolled up to the Deal.

1. Open any historical Deal that has Line Items (most do).
2. Open a Line Item and check: service_category, price_mxn_num (revenue), vendor_cost_mxn_num (cost), source currency, tip fields, payment status.
3. Go back to the Deal. Look for rollup fields in the left sidebar or Trip Economics card: total revenue, total cost, gross margin, tips owed, commission accrued, line item count.
4. Confirm revenue minus cost equals gross margin (approximately).

> **Pass if:** Economics are visible on Line Items and summarized on Deals through rollups.
> **Follow-up if:** Rollup fields are missing or formulas appear broken.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

9

Confirm Villas

Check that the Villa custom object exists with the 28 canonical villas.

1. On a Deal with a villa_name, look for a Villa association in the right sidebar.
2. Open the Villa record. Confirm it has 4 card sections: Identity, Capacity, Owner/Ops, Source/Confidence.
3. Note: Not all historical deals have villa data. 168 deals have villa_name set; the remaining 1,129 had no villa identified in the original source data.

> **Pass if:** Villa is a dedicated object with 28 records and is not mixed into vendor Companies. **Follow-up if:** Villa object is missing or empty.

○ Pass ○ Needs follow-up ○ Not applicable

Optional notes for this check. These save automatically.

NOT CHECKED YET

10

Confirm intake forms

Check that the guest intake forms exist in both English and Spanish.

1. Go to Marketing > Forms.
2. Find **Prestigia Guest Intake** (EN) and **Prestigia Guest Intake - ES**.
3. Open each form and confirm the required fields are present: name, email, phone, guest count, arrival, departure, occasion, allergies, medical, emergency contact.
4. Confirm the privacy consent checkbox exists at the bottom.
5. Note: Do not broadly launch the forms until the Aviso de Privacidad page is published on Squarespace and the ARCO inbox is confirmed. The forms are built and ready, but the privacy page link currently leads to a page that does not exist yet.

> **Pass if:** Both EN/ES forms exist with required fields and consent block. Privacy page publishing is a separate open item, not a form defect.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

11

Confirm record layouts and saved views

Check that records have organized card layouts so you are not digging through raw property lists.

1. Open a Deal record. Look for organized cards: **Trip Command**, **Trip Economics**, **Payments & Refunds**, **Tip & Commission**, **Historical 1B Badge**.
2. Open a Villa record. Look for 4 cards: **Identity**, **Capacity**, **Owner/Ops**, **Source/Confidence**.
3. In the Deals list, check the **Views** dropdown (above the table) for saved views — these are pre-built filtered lists. Views should be shared with the team (EVERYONE / COLLABORATIVE).

> **Pass if:** Records have organized card layouts and saved views are shared. Minor view preferences are UI cleanup, not blockers.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

12

Make the sign-off call

Based on everything above, make your overall Phase 1 decision.

1. If all foundation checks pass — mark Phase 1 accepted.
2. If something is wrong with the CRM foundation (missing data, broken reports, wrong pipeline) — list it as a Phase 1 correction needed.
3. If your concern is about automation, custom forms, WhatsApp, vendor cleanup, or the privacy page — those are Phase 2 / open items, not Phase 1 blockers.

> **Pass if:** Your decision is clear and every concern is classified as either a Phase 1 correction or a Phase 2 follow-up.

○ **Pass** ○ **Needs follow-up** ○ **Not applicable**

Optional notes for this check. These save automatically.

NOT CHECKED YET

14 — REPORTING INPUTS

What feeds the reports

Every report on the dashboards pulls from specific fields on specific records. This table shows what needs to be filled in for each type of reporting to work.

WHAT YOU WANT TO REPORT ON	FIELDS THAT FEED IT	WHERE TO ENTER THE DATA
Pipeline status / trip stage	pipeline, dealstage	Deal record — stage bar at top
Trip timing	Check-in/out dates, close date, service date	Deal properties + Line Item properties
Client/guest info	Contact association, language, WhatsApp, consent	Contact record, associated to Deal
Villa / property	villa_name, Villa association	Deal properties + Villa custom object
Service category breakdown	service_category, service_subcategory	Line Item + Product properties
Revenue	price_mxn_num (Line Item) → line_item_revenue_mxn_rollup_num (Deal)	Line Item price → auto-rolls up to Deal
Vendor cost	vendor_cost_mxn_num (Line Item) → line_item_cost_mxn_rollup_num (Deal)	Line Item cost → auto-rolls up to Deal
Gross margin	gross_margin_mxn_calc_num	Auto-calculated on Deal (revenue - cost)
Payment status	next_payment_status, next_payment_due_date, next_payment_link_url	Deal properties

WHAT YOU WANT TO REPORT ON	FIELDS THAT FEED IT	WHERE TO ENTER THE DATA
Tips	tip_amount_mxn_num, tip_payout_status, tip_recipient	Line Item properties → auto-rolls up to Deal
Commissions	commission_amount_mxn_num, commission_status, referring_agency	Line Item + Deal + Promoter Commission Schedule
Historical vs. live	is_historical_display_only_bool, exclude_from_phase1_cash_reports_bool	Deal + Line Item (auto-set by workflow for new records)

15 — OPEN ITEMS

Follow-ups that do not block Phase 1 acceptance

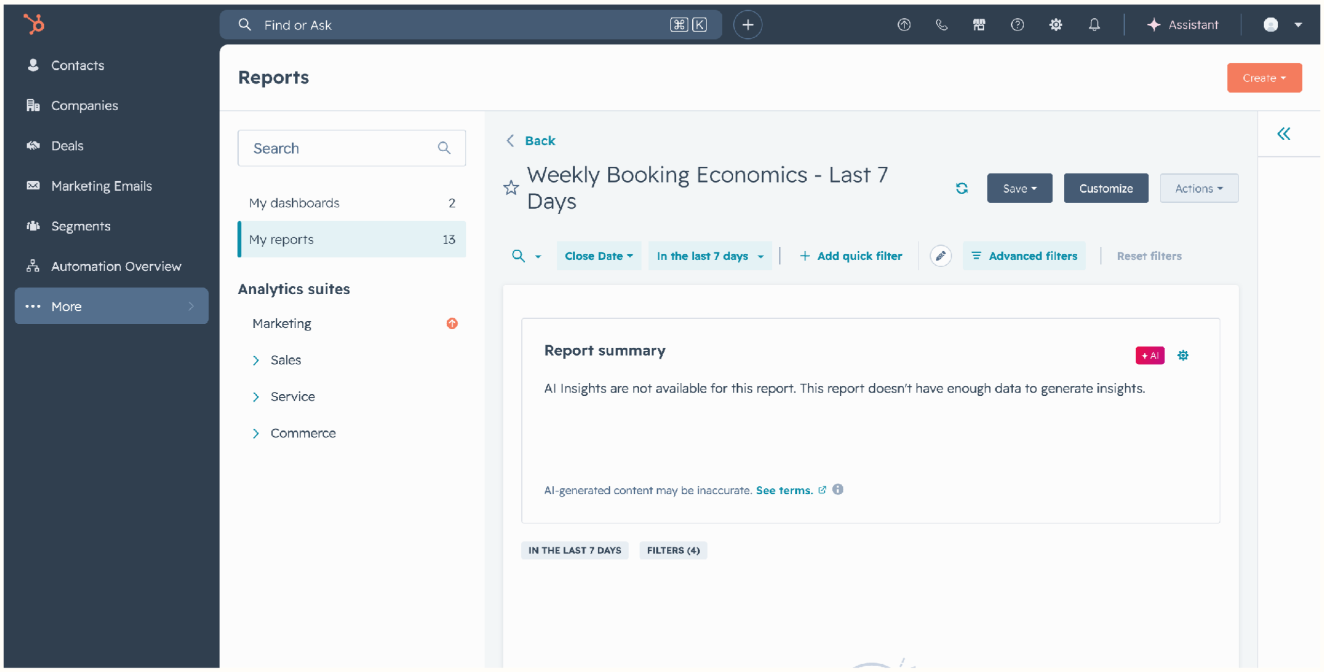
These items are known, tracked, and planned for. They should not block your sign-off unless you decide otherwise.

ITEM	OWNER	STATUS
Aviso de Privacidad page	CloudNSite drafts content; David publishes to Squarespace at /aviso-de-privacidad	Required before broadly launching the intake form. Form is built and ready; the privacy page link needs to go live.
ARCO rights inbox	Brandon / Prestigia confirms	Confirm whether privacy@prestigiamexico.com is a real, monitored inbox or provide a different address.
Cabo Chef currency check	CloudNSite	3 historical Chef Line Items may need currency flipped from MXN to USD. CloudNSite will check after sign-off — Brandon may see 1-3 updates in the audit log.
Vendor normalization backlog	Phase 2	169 Line Items have unmatched vendor names (mostly Antromex x130). These vendors are visible but not yet matched to Company records.
Villa name normalization	Phase 2	126 deals have free-text villa names that do not match the 28 canonical villas.
Custom React intake + automation	Phase 2	On-submit workflow, Deal/Contact auto-creation, WhatsApp/email notifications, conditional form UI.
Marketing subscription type	Optional	HubSpot portal settings item. Not blocking Phase 1.

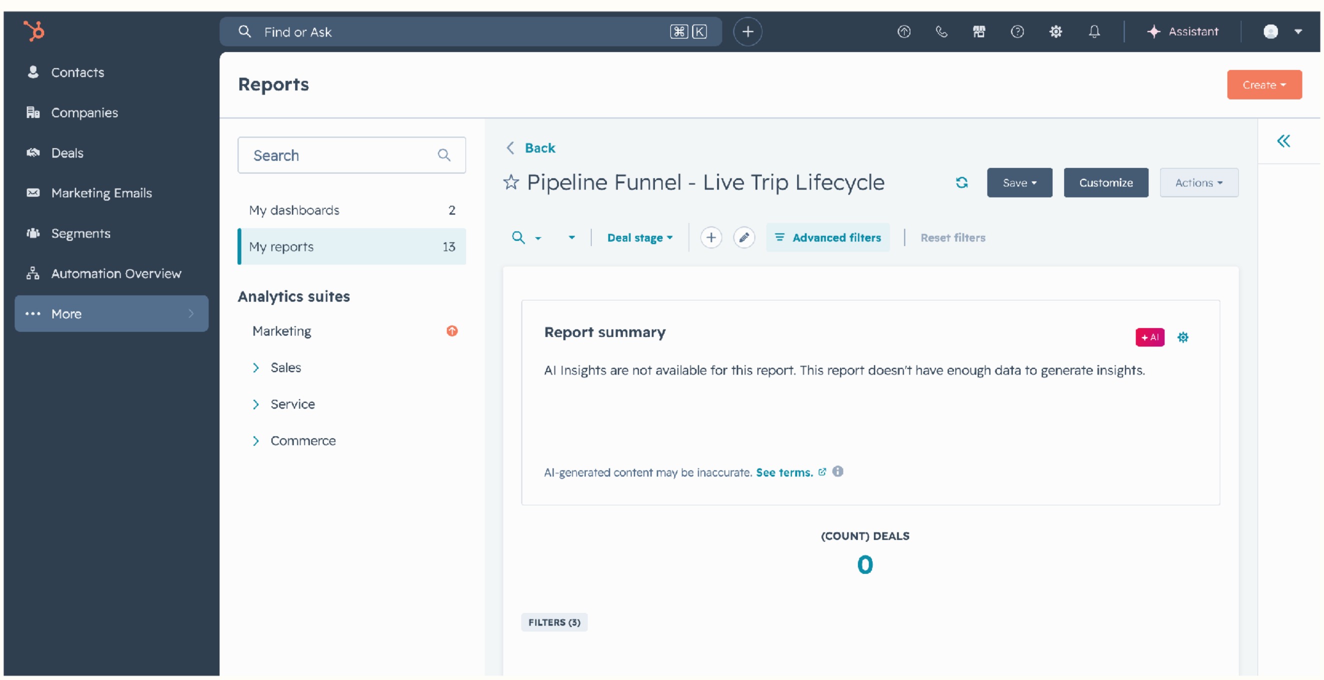
16 — SCREENSHOTS

Dashboard screenshots from the build

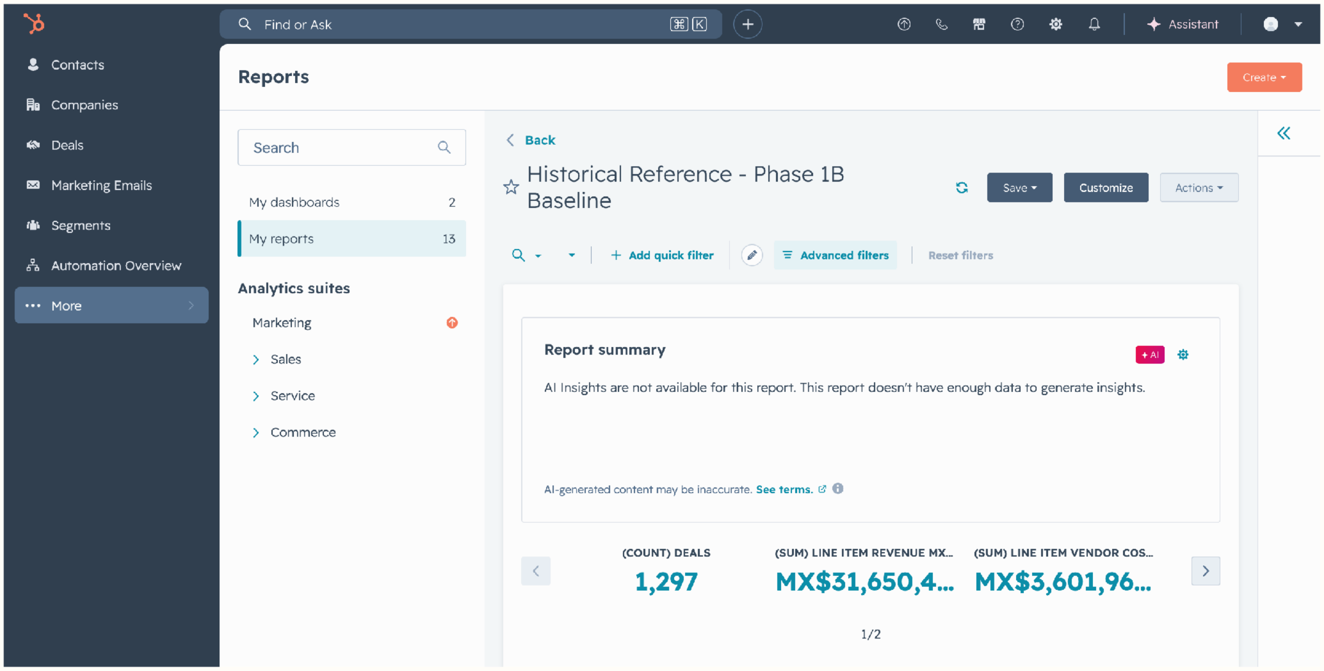
These screenshots were captured during the Phase 1 build to verify that dashboard tiles render correctly and data flows through the system.



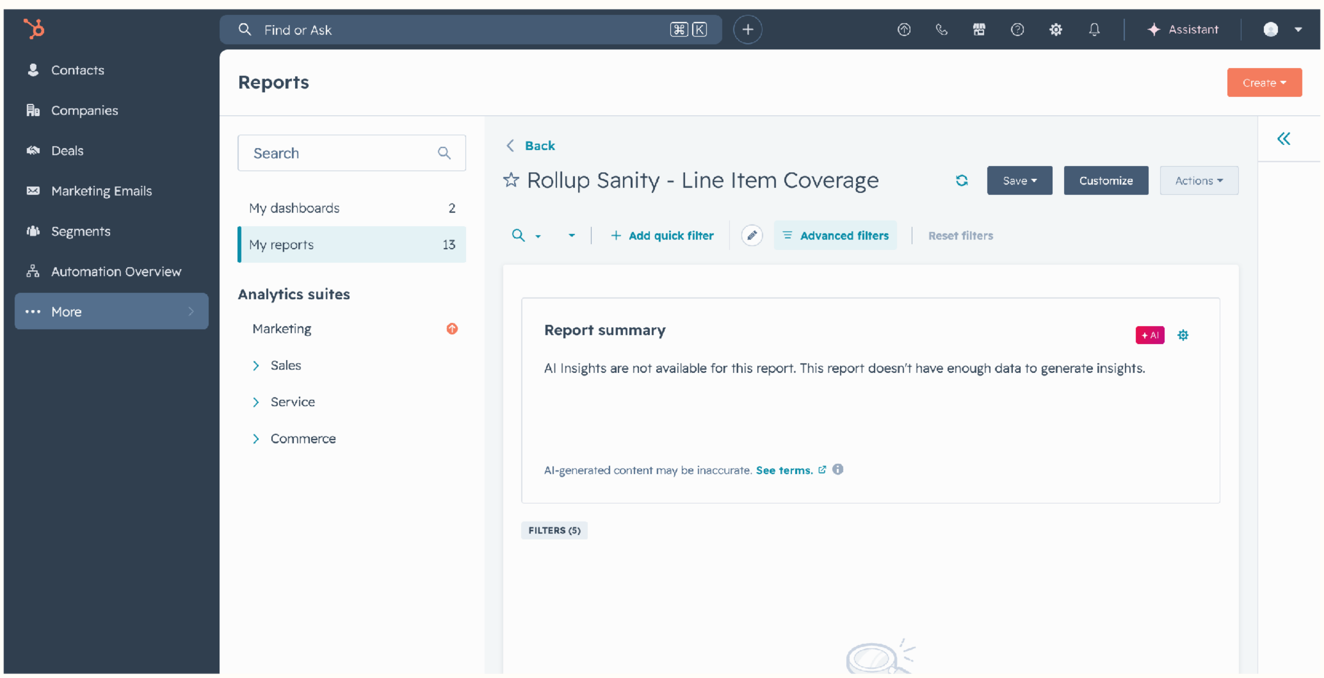
WEEKLY BOOKING ECONOMICS — LAST 7 DAYS (EMPTY STATE, NORMAL BEFORE NEW DEALS EXIST)



PIPELINE FUNNEL — TRIP LIFECYCLE STAGES



HISTORICAL REFERENCE — PHASE 1B BASELINE (LIVE DATA: 1,297 DEALS, MX$31.6M REVENUE)



ROLLUP SANITY — LINE ITEM COVERAGE (4-GROUP OR FILTER PATTERN)

Need the workbook again?

The workbook and PDF remain available here before or after you submit the review.

↓ Download full workbook

↓ Download PDF guide

17 — SUBMIT REVIEW

Submit your review

After working through the guide and completing all 12 checklist items, choose your overall Phase 1 decision below and click Submit. CloudNSite will be able to see your saved decisions, notes, and final status.

- ○ Phase 1 accepted
- ○ Accepted with listed follow-ups
- ○ Blocked — Phase 1 correction needed

Optional final notes.

Submit completed review

PRESTIGIA MEXICO / CLOUDNSITE / HUBSPOT PHASE 1 USER GUIDE & VERIFICATION / MAY 2026