

Bitrix24 CRM Preset with self-installation admin manual

Introduction

Bitrix24 CRM Preset with self installation is a powerful solution designed to enhance your sales processes and maximize efficiency. With our pre-configured CRM settings, you can quickly set up and optimize your CRM system, saving you time and effort.

The preset includes a comprehensive lead qualification pipeline with automation, allowing you to efficiently manage and nurture leads from initial contact to conversion. Benefit from automated lead scoring, task assignments, and personalized communication, ensuring that your sales team focuses on the most promising opportunities.

How to install

Before proceeding with the installation, please note the following important information:

- 1. This configuration recommended to be installed on a clean Bitrix24 instance. Please ensure that you have a backup of your current data, as some of it will be deleted during the installation process.
- If you've decided to import the solution preset on the existing Bitrix24 portal and have already added leads and deals, you need to <u>export</u> them first > import solution preset > <u>import</u> leads and deals back.
- 3. If you are using a <u>free plan</u>, you can activate the trial mode for 15 days on your portal to experience the full functionality of our solution. Webbee as a Gold Partner also offers a special <u>30 days trial by request</u>.
- 4. To begin the installation, click on a settings icon in Leads/Deals and select "Solution presets"



Or you can open the direct link on your portal (replace the URL with your domain) https://URL.bitrix24.com/marketplace/configuration/placement/crm_deal/?from=crm_kanban

Solution presets Actions	
Import	Export
60	



5. Click on "Import" and upload the configuration file.



6. If you opening the preset in the <u>Bitrix24 Market</u>, simply click the "Install" and then the "Continue" buttons.



7. There will be a warning sign saying that all your CRM data will be deleted. If you have created your account and immediately proceeded to the solution preset import, you have nothing to worry about.



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8. Once the import is completed, check what has changed in our CRM after the solution preset had been imported. Go to the CRM section. For example, there are new lead stages and the custom fields.

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- 9. Let's try to add a new lead. You can see that the new lead form has been modified and contains new fields.
- 10. Additional configuration is needed after the installation is complete.

To enable mail sending from the lead card and to set up automated email notifications, please add a sender email address in the "FROM" field. The system will then send you an email containing a verification code, which you will need to enter just once to complete the setup.



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If you have any further questions or need assistance during the installation process, feel free to ask via our <u>LiveChat</u> or support@webbee.co.nz.

Preset configuration overview

LEAD

There are nine statuses of leads available for use:

- New Request
- First Contact
- In Progress
- Appointment
- Follow-up cycle
- On-hold
- Finalizing
- Junk Lead
- Good lead

New Request lead status

These automation rules are suggested to enable the automated customer response and to plan activities for employee:

#	Automation rule	Assigned to
1.1	Change responsible person immediately	Sales Department
1.2	Modify item automatically after the previous step.	
1.3	Notification to responsible person after the previous step.	Responsible
1.4	Send email to customer automatically after the previous step.	Customer
1.5	Plan activity for responsible person after the previous step.	Responsible
1.6	Notification to responsible person 1 day after the previous step.	Responsible
2.1	Control to supervisor 3 days after the previous step.	Supervisor
2.2.	Change stage automatically 3 days after the previous step.	

First contact lead status

These automation rules are suggested to enable the automated customer follow-up and to plan activities for employee:

#	Automation rule	Assigned to
1.1	Notification to Responsible person immediately.	Responsible
1.2	Plan activity (email) to Responsible person 2 hours after the previous step during working	Responsible
	hours.	



1.3	Plan activity (Call) to Responsible person 2 hours after the previous step during working hours.	Responsible
2.1	Send SMS to customer automatically 4 hours during working hours.	Customer
3.1	Notification to Responsible person 2 days after the previous step.	Responsible
3.2	Control - 3 days to To supervisor 1 day after the previous step.	Supervisor
4.1	Notification to Responsible person 2 days after the previous step.	Responsible
4.2.	Control - 3 days to To supervisor 1 day after the previous step.	Supervisor
4.3	Send email to customer (1st follow up) automatically 2 days during working hours.	Customer
4.4	Notification 4 days to Responsible person 2 days after the previous step.	Responsible
4.5	Send email to customer (2nd follow up) automatically immediately during working hours	Customer
	after the previous step.	
4.6	Notification (3rd) 6 days to Responsible person 2 days after the previous step.	Responsible
4.7	Send email to customer (3rd follow up, FINAL) automatically immediately during working	Customer
	hours after the previous step.	
4.8	Notification (4th - FINAL) to Responsible person 5 days after the previous step.	Responsible
4.9	Change stage	

In Progress lead status

These automation rules are suggested to plan activities for employee:

#	Automation rule	Assigned to
1.1	Notification to Responsible person immediately.	Responsible
1.2	Create task	Responsible
1.3	Notification 2nd (Responsible) after 2 days	Responsible
2.1	Control for Supervisor - 5 days	Supervisor

Appointment lead status

These automation rules are suggested to send the meeting email:

#	Automation rule	Assigned to
1.1	Get employee information	System
1.2	Add notification to update user profile	Responsible
1.3	Add comment to update user profile	Responsible
1.4	Modify item - Get Open-Slot url link from user profile	System
1.5	Send email to customer (Online meeting)	Customer
1.6	Send email to customer (Off-line Meeting)	Customer

* How to use Open Slots link

Open Calendar in the main menu, click to enable Open Slots and copy the link.

	CONNECT CALENDAR OPEN SLOTS
Th	Open slots • A Need to find the right time for meeting with people outside your company? Send them a link to your then slots. Your contacts will choose the time they prefer.
	Create a test meeting Available slots Munoridays are selected by default
1	Workdays v 09:00 ^{AM} v - 07:00 ^{PM} v +
	Add your colleagues to shared slots
1	Copy link & Shared slots



To add this link to an individual user profile, click "Select field" and add field "Other websites".



Once added, paste the Open Slots link and click "Save".

	Contact information
	First name Webbee Last name
WEBCIE	Support Contact email
	Department Bitrix
	Second name field is empty
Measure your stress level	Other websites https://XYZ-leads.bitrix24.com/~1xBRb
HOW TO MEASURE?	Select field Create field

* How to use resource booking option <u>https://helpdesk.bitrix24.com/open/15375256</u> For the Off-line meeting, you need the following fields updated:

- **Resources** provide name for your offline meeting locations, like Office Brisbane.
- Add services and duration Onsite demonstration, 30 min.
- Specify your time zone.
- Allow overbooking uncheck if you only have 1 meeting location of each type.

Example of the off-line meeting booking:

otari date		Time	
04/24/2024	24	03:00 pm ~	
Service		Duration	
Onsite demonstration	\sim	30 min 🗸	
Employees	Select	t employees	
Webbee Support			
Resources			

In case you would like to resend the email with the meeting details or make changes in the booking, just reapply the stage to the selected lead in the List view as below. The automation rules will be processed again.



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Follow-Up cycle lead status

These automation rules are suggested to enable the automated customer follow-up:

#	Automation rule	Assigned to
1.1	Send 1st email to customer	Customer
1.2	Add 1st comment to item	Responsible
1.3	Send 2nd email to customer	Customer
1.4	Add 2nd comment to item	Responsible
1.5	Send 3rd email to customer	Customer
1.6	Add 3rd comment to item	Responsible

On-hold lead status

These automation rules are suggested to process leads in the pending stage:

#	Automation rule	Assigned to
1.1	Notification 1st (Responsible)	Responsible
1.2	Add 1st comment to item	Responsible
1.3	Notification 2nd (Responsible)	Responsible
1.4	Add 1st comment to item	Responsible

Finalizing lead status

These automation rules are suggested to process leads in the final stage:

#	Automation rule	Assigned to
1.1	Create CRM item – Quote	Responsible
1.2	Add comment to item	Responsible
1.3	Send email with a Quote to Responsible	Responsible
1.4	Notification to Responsible	Responsible
2.1	Control in 3 days	
2.2	Change stage to On-hold	

Good lead status

These automation rules are suggested to process leads in the closing stage:

#	Automation rule	Assigned to
1.1	Notification to Responsible	Responsible



Junk lead status

These automation rules are suggested to process leads in the closing stage:

#	Automation rule	Assigned to
1.1	Notification to Responsible	Responsible