335 East Coast Road, Mairangi Bay, Auckland 0630
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# LeadMaster Pro

## Bitrix24 CRM Preset with self-installation admin manual

## Introduction

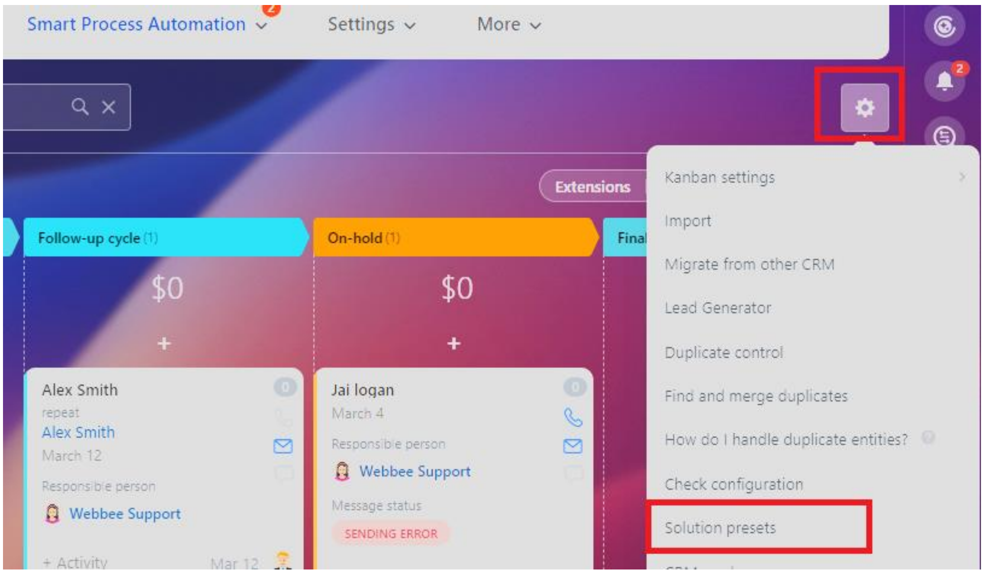
**Bitrix24 CRM Preset with self installation** is a powerful solution designed to enhance your sales processes and maximize efficiency. With our pre-configured CRM settings, you can quickly set up and optimize your CRM system, saving you time and effort.

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.

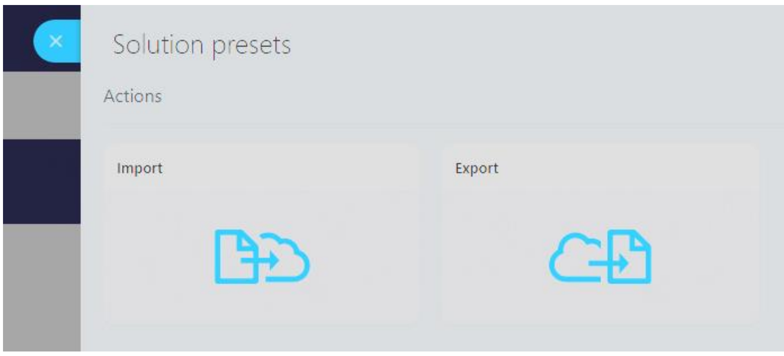
## How to install

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.
2. If you've decided to import the solution preset on the existing Bitrix24 portal and have already added leads and deals, you need to export them first > import solution preset > import leads and deals back.
3. If you are using a free plan, 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 **30 days trial by request**.
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



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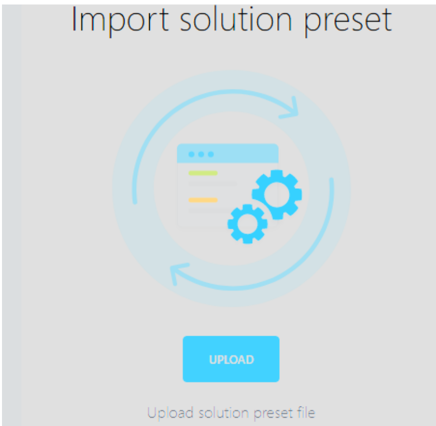
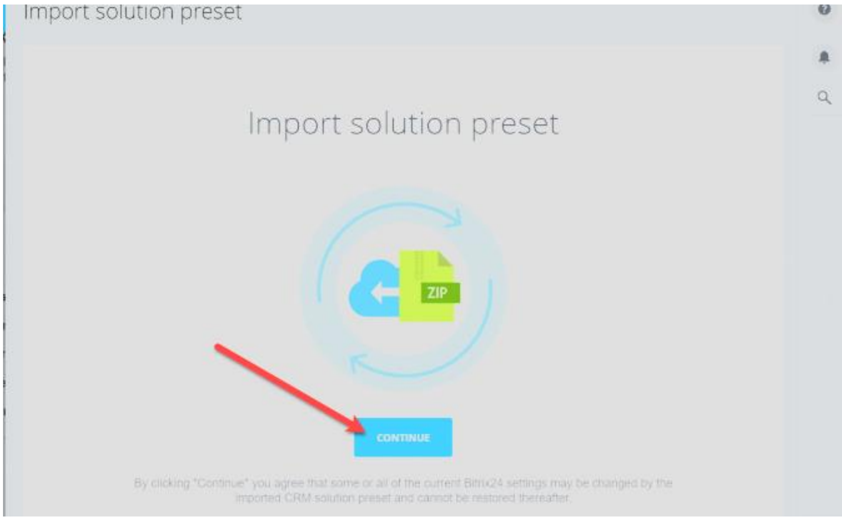
5. Click on “**Import**” and upload the configuration file.




6. If you opening the preset in the [Bitrix24 Market](), 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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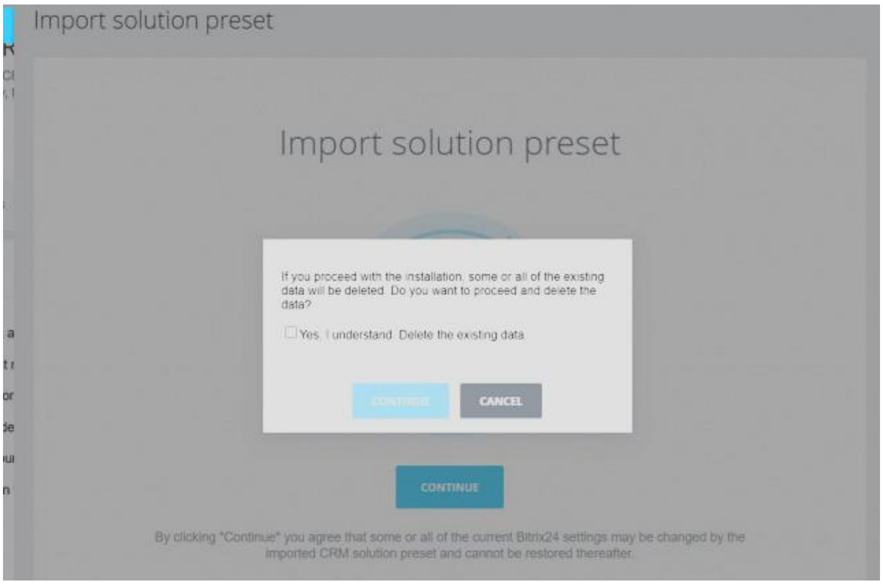
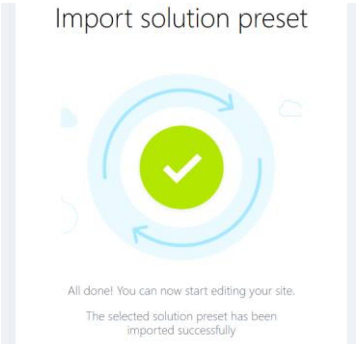
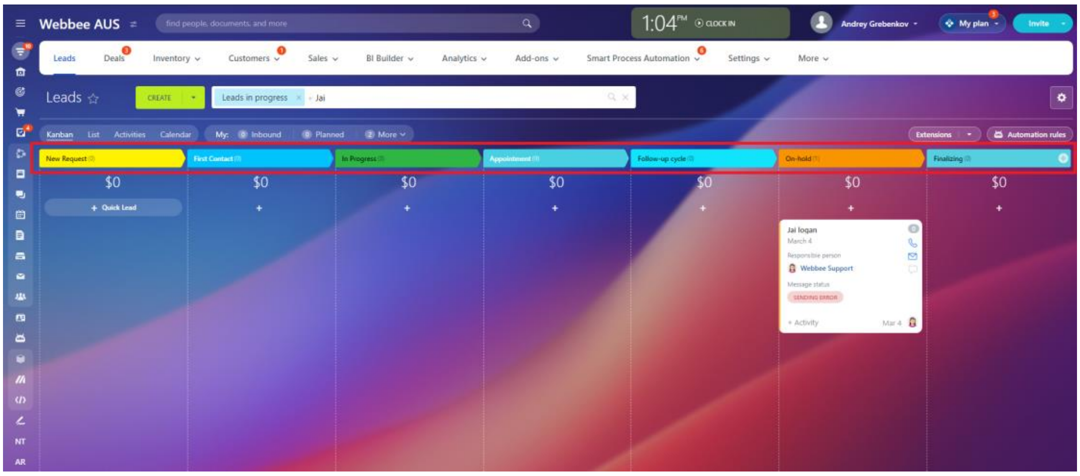


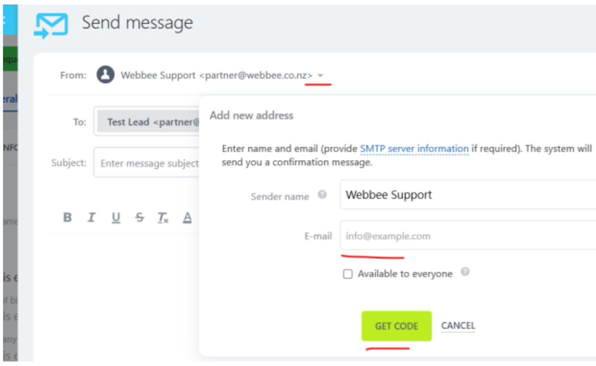




8. Once the import is completed, check what has changed in our CRM after the solution preset had been imported. Go to the CRM section. For example, there are new lead stages and the custom fields.




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.




If you have any further questions or need assistance during the installation process, feel free to ask via our LiveChat 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 hours. | Responsible |

| | | |
|---|---|---|
| 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 after the previous step. | Customer |
| 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 hours after the previous step. | Customer |
| 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 |

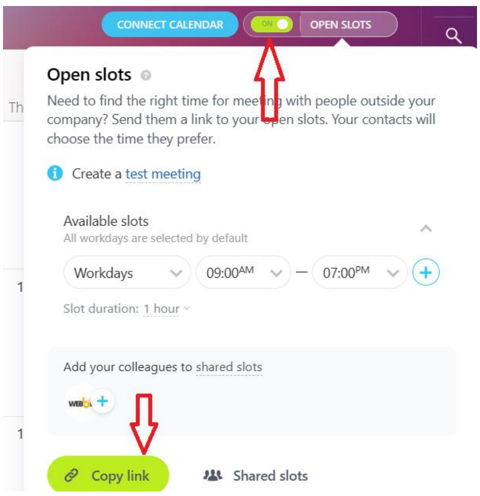
## Appointment lead status

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.



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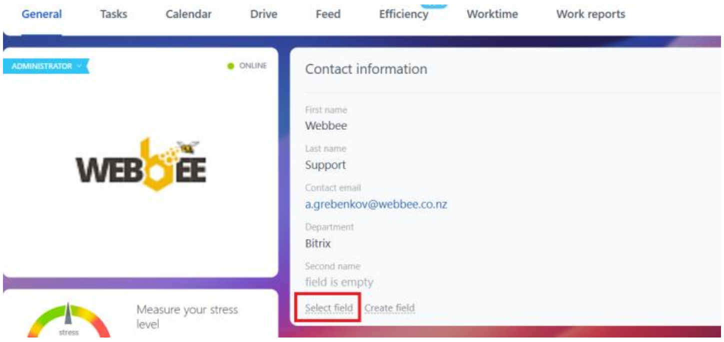
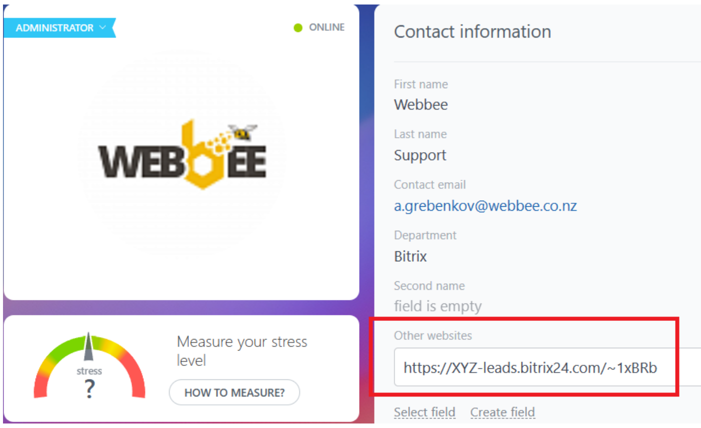
To add this link to an individual user profile, click “Select field” and add field “Other websites”.



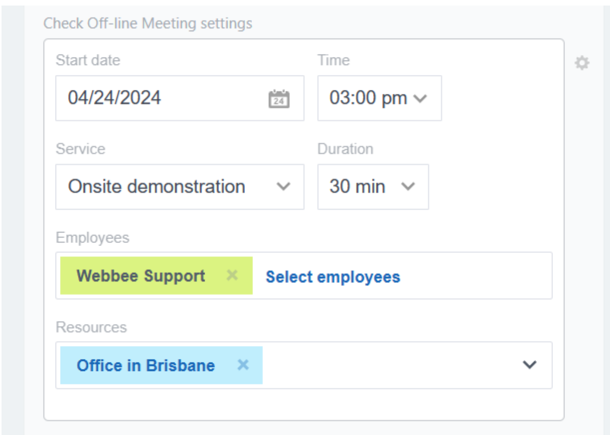

Once added, paste the Open Slots link and click “Save”.



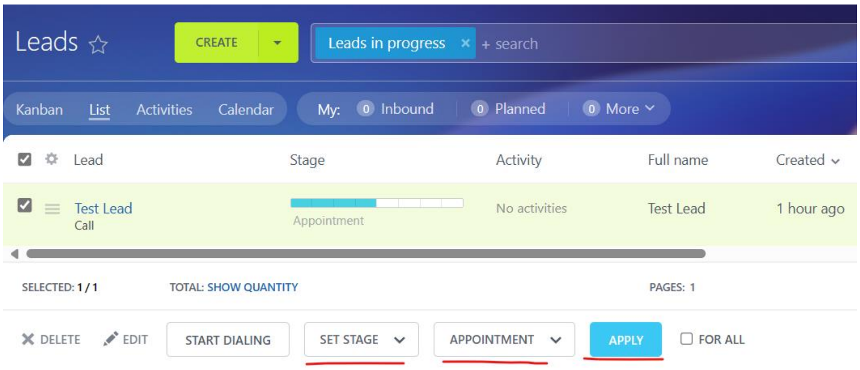

* How to use resource booking option https://helpdesk.bitrix24.com/open/15375256
For the Off-line meeting, you need the following fields updated:

- **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:




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.




## 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 |
| | | |

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## 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 |
| | | |