

WhatsApp API Integration for Bitrix24 CRM — Feature List

1. Basic WhatsApp Integration

- Official WhatsApp Business API / Cloud API integration
- Connect WhatsApp Business number with Bitrix24
- Send WhatsApp messages directly from:
 - Leads
 - Contacts
 - Companies
 - Deals
- Receive customer WhatsApp messages inside Bitrix24
- Automatic conversation history
- Customer phone number synchronization
- Send text messages
- Send images
- Send PDF/documents
- Send videos and other supported media
- WhatsApp message delivery/read status
- CRM timeline message logging

Bitrix24 already supports WhatsApp integrations through its Contact Center and marketplace ecosystem.

2. Lead Generation & Promotion

Website → Bitrix24 → WhatsApp

- Website enquiry form
- WhatsApp enquiry button
- Click-to-WhatsApp campaign
- Facebook/Instagram lead integration
- Google Ads lead integration
- Landing-page lead capture

- Automatic Lead creation in Bitrix24
- Automatic assignment to sales employee
- Source/campaign tracking
- Lead status tracking
- UTM campaign tracking

Automatic New Lead Message

When a new lead is created:

Customer receives:

Thank you for contacting us. We have received your enquiry. Our representative will contact you shortly.

Sales employee receives:

New WhatsApp Lead Received — Customer: {{Name}} — Mobile: {{Mobile}} — Requirement: {{Requirement}}

Bitrix24 REST API can create/update CRM records and trigger automation based on CRM events.

3. Thank-You & Enquiry Automation

New Enquiry

Automatically send:

Thank You Message

Hello {{Customer Name}},
Thank you for contacting {{Company Name}}. We have received your enquiry regarding {{Requirement}}. Our team will contact you shortly.

Follow-Up Automation

Example:

After 1 hour

- Sales notification

After 1 day

- Follow-up WhatsApp message

After 3 days

- Second follow-up

After 7 days

- Final follow-up

No response

- Automatically move Lead to "Follow-Up Required"

4. Proforma Invoice Automation

This is especially useful for your Bitrix24 sales workflow.

Deal Stage**Quotation / Proposal → Proforma Invoice**

System can automatically:

1. Read customer details from Bitrix24
2. Read deal amount
3. Generate Proforma Invoice PDF
4. Store PDF in CRM
5. Send PDF through WhatsApp
6. Add activity to Deal timeline
7. Update invoice status

WhatsApp Message

Dear {{Customer Name}},
Please find attached the Proforma Invoice for {{Product/Service}}.
Invoice No: {{Invoice No}}
Amount: ₹{{Amount}}
Kindly review and contact us if you have any questions.

WhatsApp Business Platform supports document/media messages and template-based business-initiated communications.

5. Payment Due Reminder

Automatic Payment Reminder

Based on invoice/payment due date:

7 Days Before Due Date

Dear {{Customer Name}}, your payment of ₹{{Amount}} is due on {{Due Date}}. Kindly arrange the payment on or before the due date.

Due Date

Dear {{Customer Name}}, this is a reminder that payment of ₹{{Amount}} is due today.

After Due Date

Dear {{Customer Name}}, payment of ₹{{Amount}} is currently outstanding. Kindly arrange payment at your earliest convenience.

Escalation

- Due → Reminder
- 3 Days Overdue → Second Reminder
- 7 Days Overdue → Final Reminder
- 15 Days Overdue → Sales/Accounts notification
- Automatically create Bitrix24 task

- Escalate to manager

6. Payment Confirmation

After payment is recorded:

Dear {{Customer Name}},

Thank you. We have received your payment of ₹{{Amount}} against Invoice {{Invoice No}}.

Payment Status: **Paid**

Thank you for your business.

Optional:

- Payment receipt PDF
- Invoice copy
- Transaction ID
- Payment date
- Remaining balance

7. Automatic Work Details / Service Update

This is a very useful feature for service companies.

When work status changes in Bitrix24:

Work Started

Hello {{Customer Name}}, your work/order {{Work ID}} has been started. Our team is currently working on your requirement.

Work In Progress

Work Update: {{Work Name}} is currently **In Progress**. Current status: {{Status}}.

Work Completed

Dear {{Customer Name}}, your work/order {{Work ID}} has been completed successfully. Thank you for choosing {{Company Name}}.

Pending Customer Information

Dear {{Customer Name}}, we require some additional information/documents to proceed with your work. Please provide the required details at your convenience.

8. Advanced CRM Automation

Deal Pipeline Automation

Example:

New Lead



Contacted



Requirement Received



Quotation Sent



Proforma Invoice Sent



Payment Pending



Payment Received



Work Started



Work In Progress



Work Completed



Customer Feedback

↓
Closed

Each stage can trigger different WhatsApp messages, tasks and notifications.

Bitrix24 provides automation rules, triggers, workflows and event handlers for this type of CRM automation.

9. Marketing WhatsApp Campaign

Bulk Campaign

Target customers based on:

- New Leads
- Existing Customers
- Previous Customers
- Interested Leads
- Lost Leads
- Product Category
- Location
- Service Category
- Purchase History
- Deal Stage

Promotional Messages

Examples:

- New Service Launch
- Festival Offer

- Discount Campaign
- Limited-Time Offer
- Product Announcement
- Service Renewal
- AMC Renewal
- Subscription Renewal
- Event Invitation
- Webinar Invitation

WhatsApp Business Platform distinguishes marketing, authentication, utility and service messaging, and business-initiated outreach requires appropriate templates and customer opt-in.

10. Interactive WhatsApp Messages

Instead of only text, use:

Buttons

Quotation Available

[View Quotation](#) | [Contact Sales](#)

Payment Reminder

[Pay Now](#) | [Contact Accounts](#)

Work Status

[View Status](#) | [Contact Support](#)

Customer Feedback

[Satisfied](#) | [Need Support](#)

WhatsApp Business Platform supports interactive messages such as reply buttons and list messages.

11. WhatsApp Template Management

Create approved templates such as:

- new_lead_thank_you
- quotation_sent
- proforma_invoice
- payment_due
- payment_overdue
- payment_received
- work_started
- work_progress
- work_completed
- document_required
- service_renewal
- customer_feedback
- marketing_offer

Templates can include text, media, buttons and document headers.

12. Advanced Sales Automation

Lead Scoring

Automatically calculate:

- Enquiry source
- Product interest
- Budget
- Customer response
- Follow-up activity
- Deal value

Then automatically assign:

Hot Lead → Senior Sales Executive

Warm Lead → Sales Executive

Cold Lead → Marketing Follow-up

13. Automatic Employee Notification

When a new WhatsApp enquiry arrives:

Sales Team



New Lead

Name: {{Name}}

Mobile: {{Mobile}}

Requirement: {{Requirement}}

Source: WhatsApp

Assigned To: {{Employee}}

Can also create a Bitrix24 task automatically. Bitrix24's developer tools support automatic task creation and employee notifications.

14. Customer Service Automation

FAQ Chatbot

Customer can select:

- 1. Product Information**
- 2. Pricing**
- 3. Demo Request**
- 4. Payment Status**
- 5. Existing Order**
- 6. Contact Support**

The system can respond automatically or transfer the conversation to a human agent.

15. Advanced Document Automation

Automatically generate and send:

- Quotation
- Proforma Invoice
- Tax Invoice
- Payment Receipt
- Purchase Order
- Work Order
- Agreement
- AMC Document
- Service Report
- Proposal
- Statement of Account

All documents can be linked to the corresponding Bitrix24 Lead/Deal/Contact.

16. Payment Gateway Integration

Optional integration with:

- Razorpay
- Cashfree
- PayU
- Stripe
- Other payment gateways

Workflow:

Invoice Generated



WhatsApp Payment Link



Customer Pays



Payment Gateway Webhook



Bitrix24 Updated



WhatsApp Payment Confirmation



Deal → Paid

17. Customer Renewal Automation

Useful for AMC, subscriptions and recurring services.

Example:

30 Days Before Expiry

Your {{Service}} subscription will expire on {{Date}}.

15 Days Before

Your service renewal is due soon.

7 Days Before

Renewal Reminder

Expiry Date

Your service has expired. Please contact us for renewal.

18. Advanced Reporting Dashboard

WhatsApp Analytics

- Total messages
- Sent
- Delivered
- Read
- Failed

- Customer responses
- Response time
- Leads generated
- Leads converted
- Campaign performance
- Template performance

Sales Analytics

- WhatsApp Leads
- WhatsApp → Deal conversion
- Quotation → Payment conversion
- Revenue from WhatsApp leads
- Pending payments
- Overdue payments
- Employee performance

19. Recommended Complete Workflow

For your requirement, I would structure the system like this:

Website / Facebook / Instagram / Google



Lead Generation



Bitrix24



Automatic WhatsApp



Thank You Message



Sales Follow-up



Requirement Details



Quotation



Proforma Invoice PDF



WhatsApp Document Send



Payment Reminder



Payment Gateway



Payment Confirmation



Work Started



Work Progress Update



Work Completed



Feedback / Review



Renewal / Marketing

Suggested Package Structure

Package	Main Features
Basic	WhatsApp + Bitrix24 + Send/Receive + CRM history
Standard	Basic + Lead automation + Thank-you + Follow-ups + Templates
Professional	Standard + Quotation + Proforma Invoice + Payment reminders + Work updates
Advanced	Professional + Marketing campaigns + Payment Gateway + Chatbot + Analytics + Renewal automation