

Grandstream Networks, Inc.

Bitrix24 CRM Configuration Guide



Introduction

Bitrix24 CRM seamless integration allows the user to leverage the customer relationship management tools offered by Bitrix24. When a customer calls the agent, the agent can easily add the information and track the customer life-cycle within Bitrix24 CRM. When the contact information exists in the database, the customer's full name will be displayed.

Bitrix24 CRM Administrator Webhook Configuration

Integration Requirements

Bitrix24

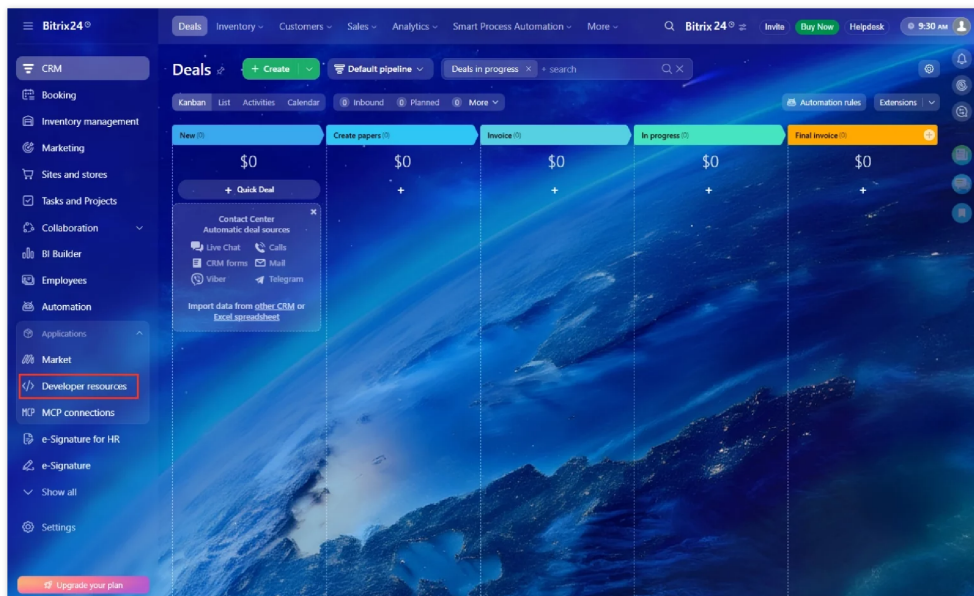
- Use **Bitrix 24 Cloud Version** and subscribe to any of the following plans:
 - Basic
 - Standard
 - Professional
 - Enterprise

PBX server

- Access to Internet.
- Compatible firmware minimum version. (See [Supported Models](#))

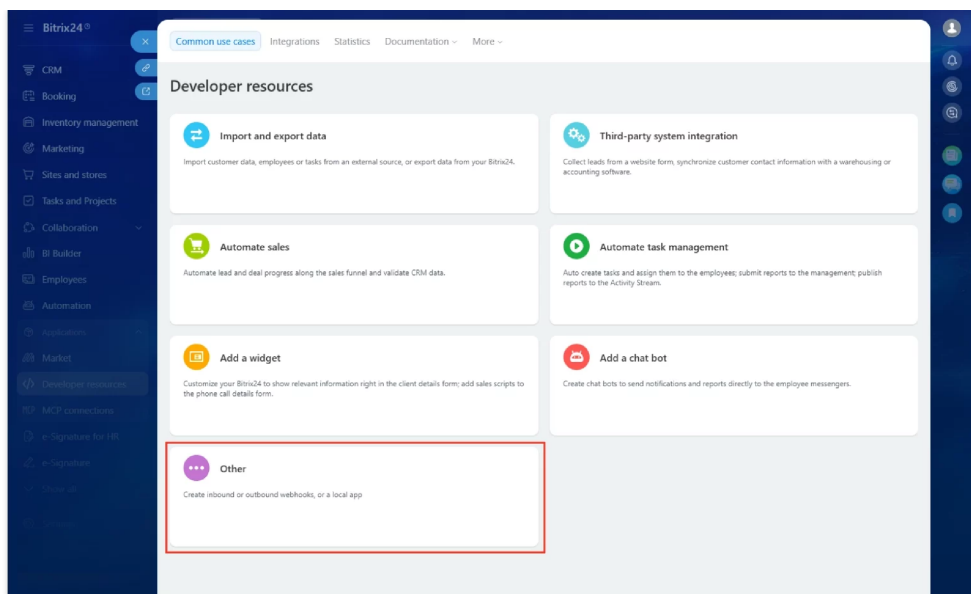
Webhook Creation

1. Log in to Bitrix24 using an administrator account and click on Developer Resources.



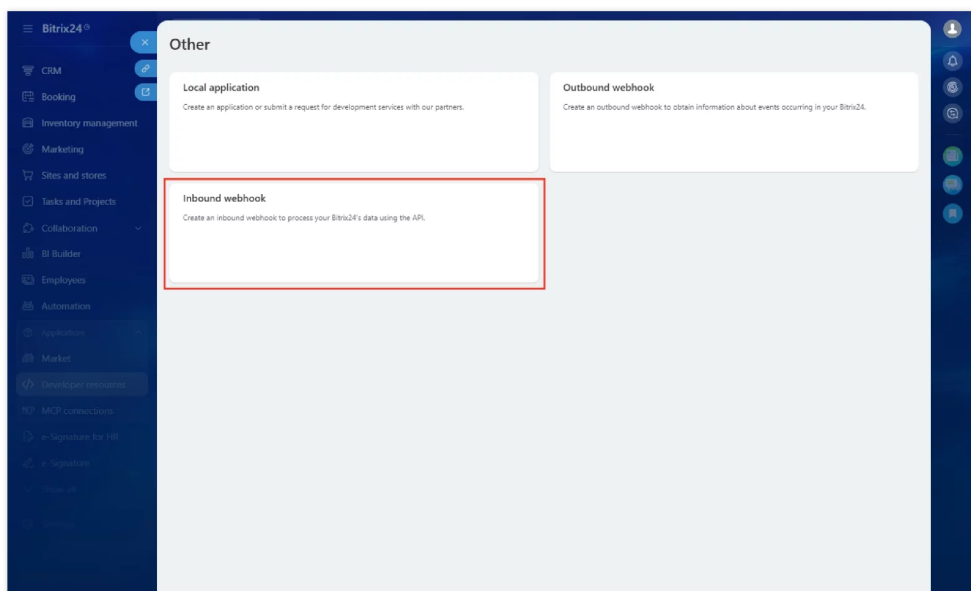
Bitrix24 CRM Home Page

2. Click "Other" to select and create the corresponding Webhook.



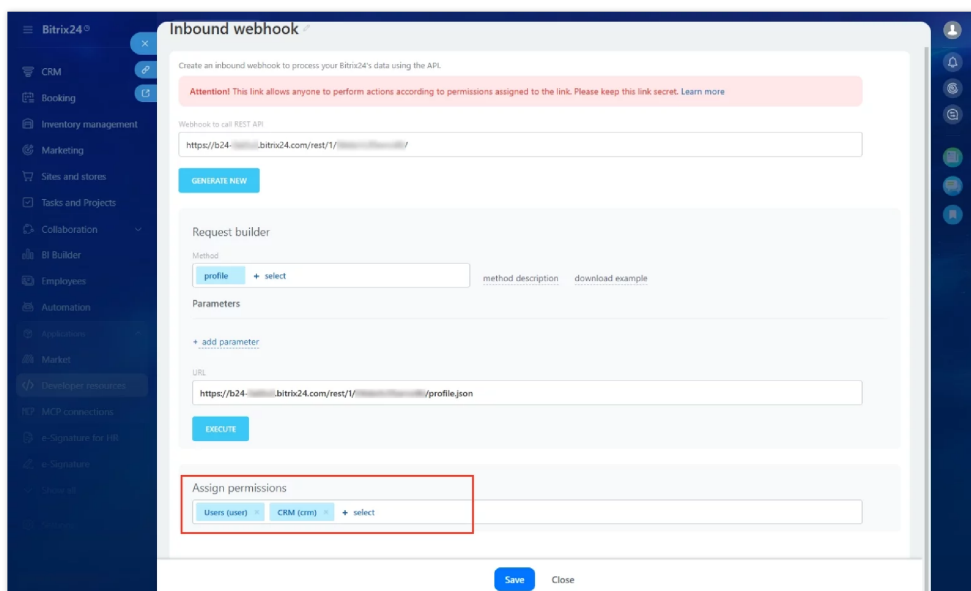
Developer Resources

3. Click "Create Inbound Webhook" to enter the inbound Webhook configuration interface.



Other Resources

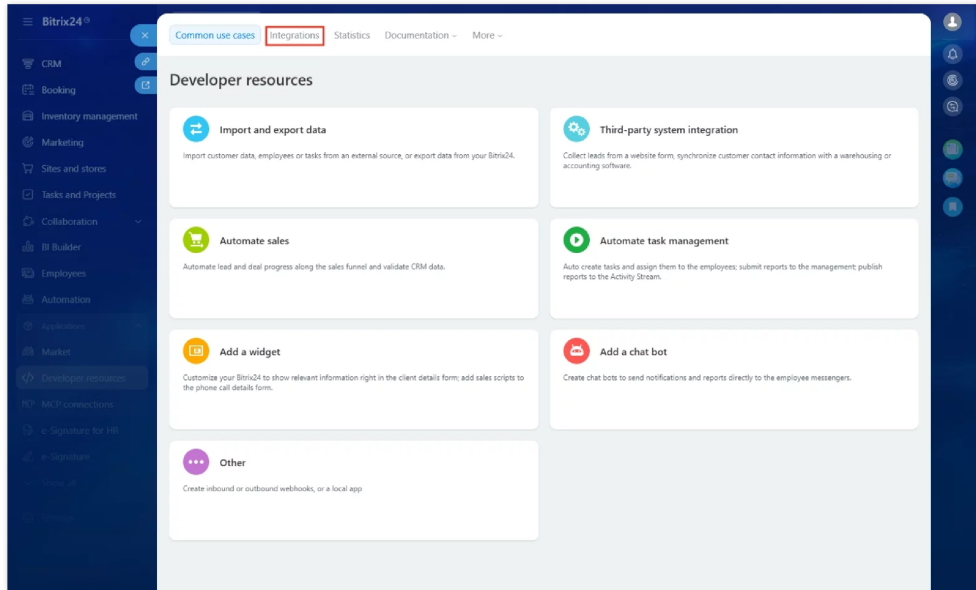
4. Set Webhook permissions. When creating an inbound webhook, you only need to select user and CRM permissions. These can be configured later at the top of the developer resources page.



Assign Permissions

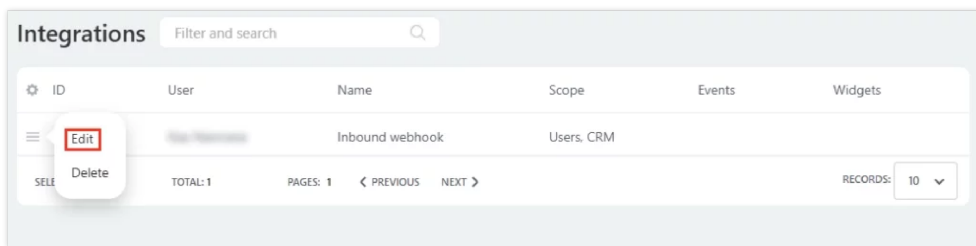
If you had created a webhook before, and you want to retrieve it. Please follow the steps below.

1. Go to the Integrations tab



Developer Resources

2. Click on the menu icon, and click "Edit". Then the webhook page will appear.



Integrations

Bitrix24CRM PBX Configuration

1. PBX Administrator

- **Step 1:** Log in as the administrator, then navigate to **Integrations > CRM**.
- **Step 2:** Select the "Bitrix24 CRM" from the list, and enter the server region address.
- **Step 3:** In Add Unknown Number, select "Contacts".
- **Step 4:** In Contact Lookups, select the directory where to look up numbers when a call is received.

CRM

CRM System: Bitrix24CRM

* CRM Server Region: https://b24-...bitrix24.com

* Add Unknown Number: Contacts

Contact Lookups:

- Available: 0 items
- Selected: 3 items
 - ☐ Look up in Contacts table
 - ☐ Look up in Leads table
 - ☐ Look up in Organizations table

Learn more about Bitrix24CRM with the [Configuration Manual](#)

Buttons: Cancel, Save

Bitrix24 CRM

2. Extension configuration

To configure the individual extension accounts, the user may log into the IPPBX using their extension number and their password.

Inbound webhook

Create an inbound webhook to process your Bitrix24's data using the API.

Attention! This link allows anyone to perform actions according to permissions assigned to the link. Please keep this link secret. [Learn more](#)

Webhook to call REST API: https://b24-...bitrix24.com/rest/1/

Buttons: GENERATE NEW

Request builder:

Method: profile + select

Links: method description, download example

Parameters

Inbound Webhook

Access the webhook URL page, and copy the full webhook URL and paste it into the "Access Key" field.

CRM User Settings

Enable CRM: ☒

* Access Key: https://b24-...bitrix24.com/rest/1/

Verification status

Buttons: Cancel, Save

CRM User Settings

When the authentication is completed, the "Verification Status" will switch to "Passed".

CRM User Settings

Enable CRM

☒

* Access Key

Verification status

Passed

Cancel

Save

CRM User Setting Integration Established

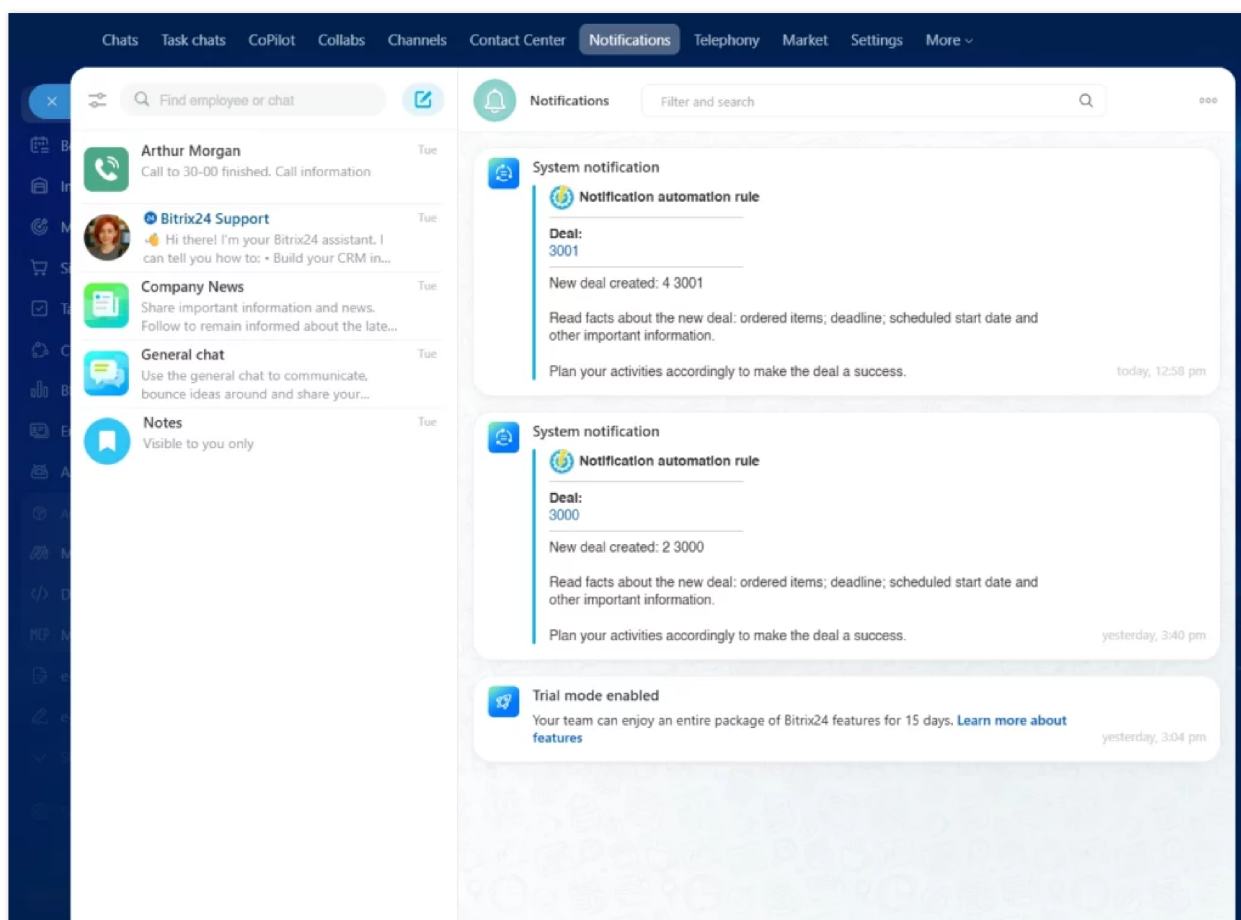
Notes

PS: There are two sources of user webhooks.

1. Provided by the administrator.
2. Users with a Bitrix24 account should join the Bitrix24 organization where the administrator account is located, and then create their own account.

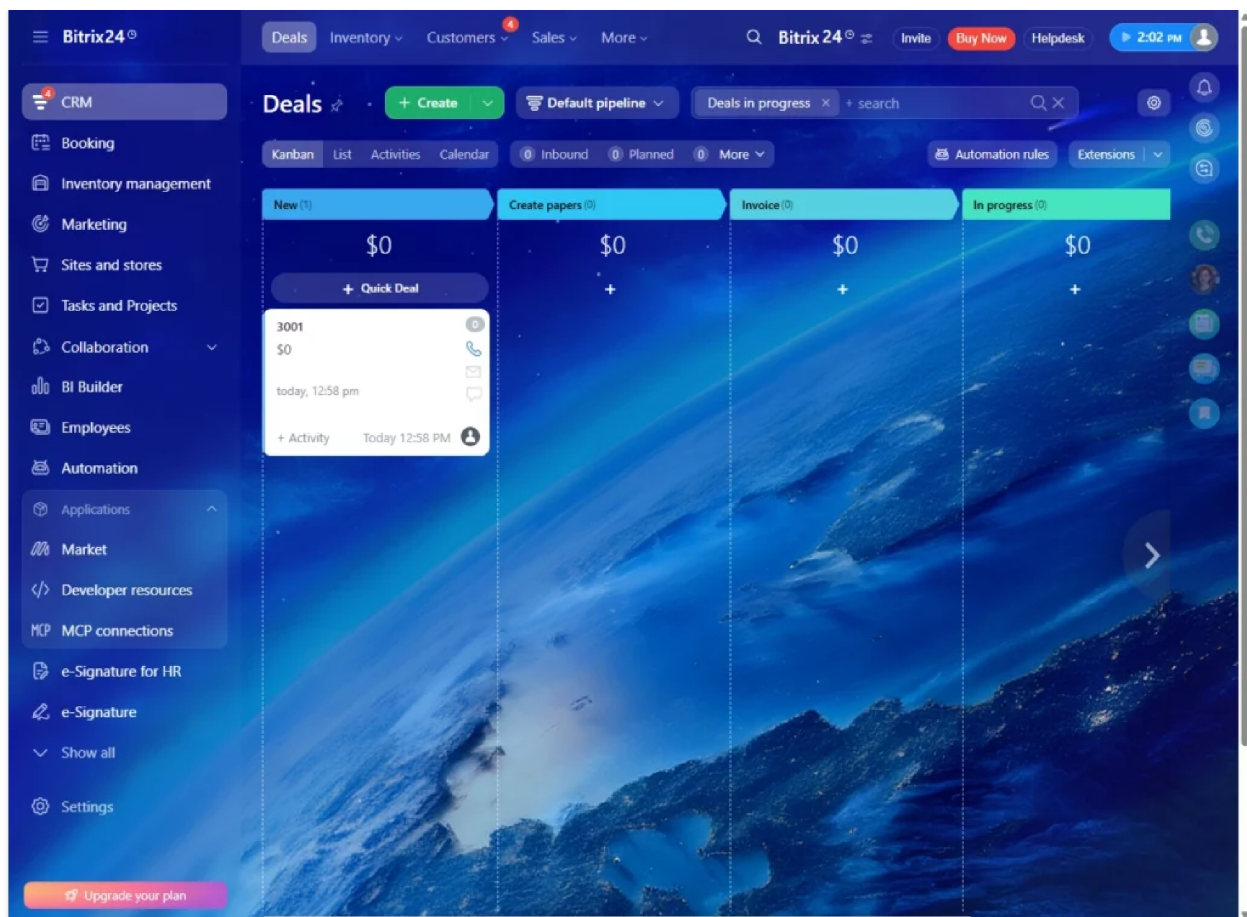
Capturing Leads and Adding Information

When a call is received, the CRM system will notify the user on the platform, as show in the screenshot below.

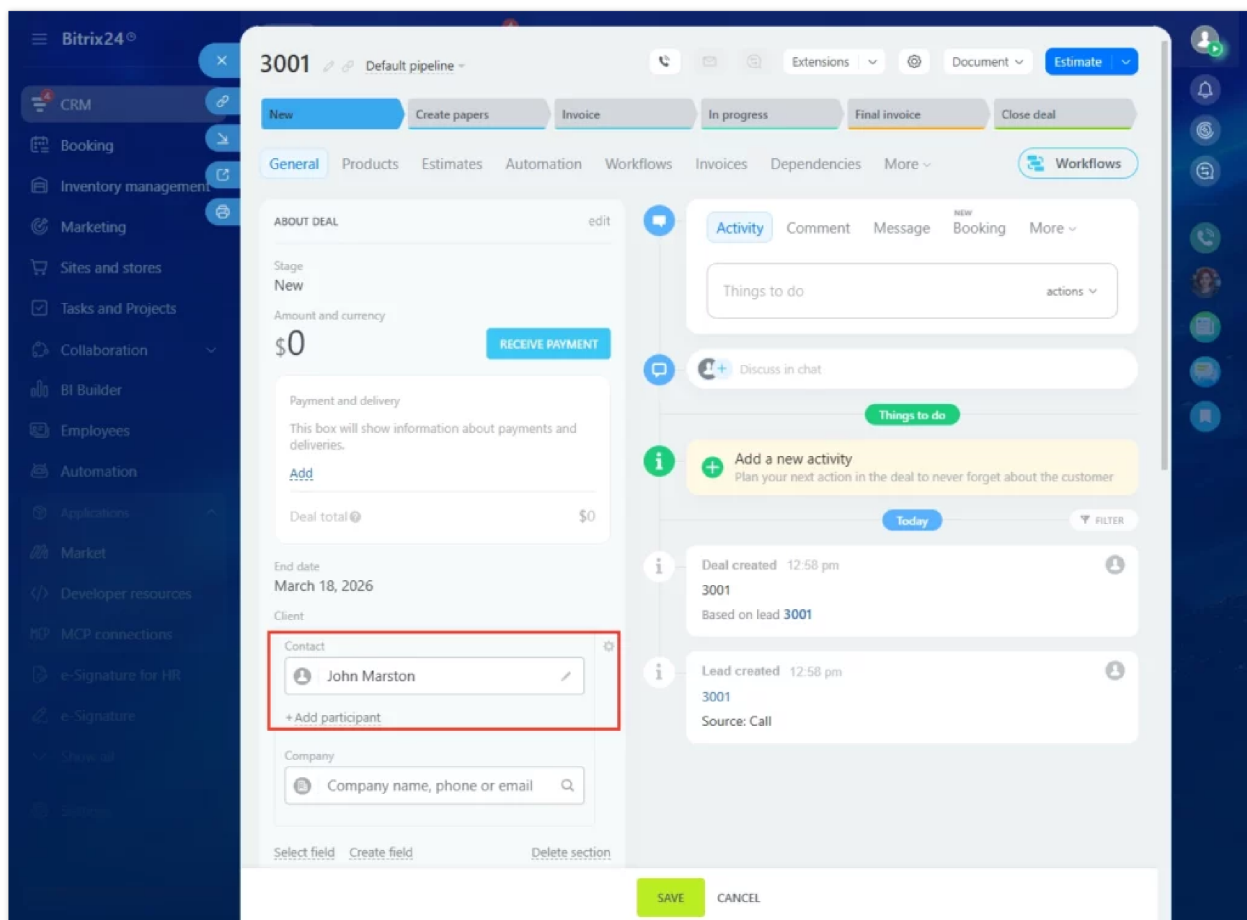


New Deal Notification

The user can click on the lead from the list and add information.



List of Deals



Edit Deal

Note:

For full integration of Bitrix24 CRM with Wave for call popups and click2call, please refer to the following link:
<https://documentation.grandstream.com/knowledge-base/wave-crm-add-ins/#bitrix24-crm-system>

Supported Models

The following table shows the list of PBX models that support the Bitrix24 CRM integration.

Model	Minimum Firmware Version
UCM63xx	1.0.33.7+
UCM63xx/A	1.0.33.7+
SoftwareUCM	1.0.33.7+
CloudUCM	1.0.33.10+