

BITRIX 24 MANAGEMENT

2025

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Note: All instructions in this guide refer to the mobile version of the app. If you're using the desktop version, the layout may vary slightly—but the process is very similar and intuitive to navigate.

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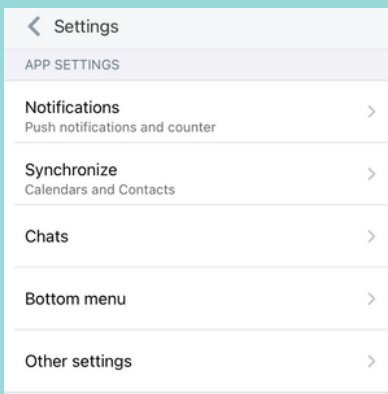
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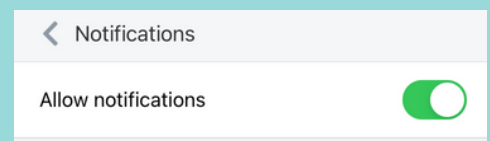
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MOBILE APP SETTINGS

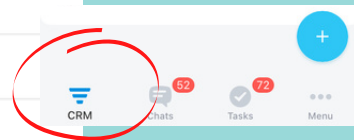
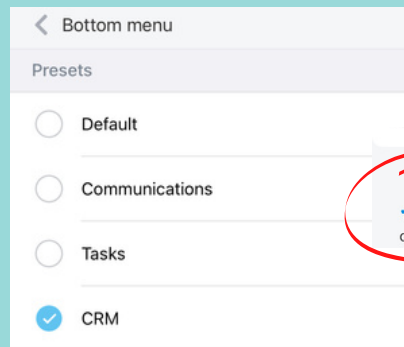
The CRM is where you'll be working the most, so make sure it's easily accessible. Also, keep your notifications on to quickly claim leads if you're interested in working them. Remember, we operate on a first-come, first-served basis!



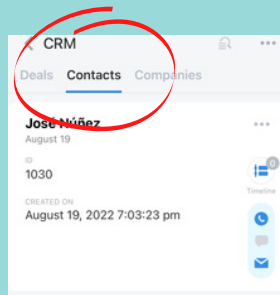
Toggle your notifications on.



Select the CRM checkbox as Bottom Menu for easy access to deals when you open the app



Each lead will have an associated contact, which you can find in the "Contacts" tab within the CRM.



 **Click on the link below to download the App for your operating system**



INCOMING LEADS

This is how a lead will appear

The image shows a screenshot of a lead card in a CRM system. The card is titled "Lead in Pflugerville - For Rental" and was received "Yesterday, 2:33 pm". It is currently in the "New / Unclaimed" stage, with a "Claimed" stage also visible. The deal amount is listed as "\$2,250". The responsible person is "Unclaimed Lead". The city is "Pflugerville" and the deal type is "Rental". The contact name is "Shaheed Shaikh".

Annotations with arrows point to the following elements:

- Area of interest**: Points to the title "Lead in Pflugerville - For Rental".
- Sale/Rental**: Points to the title "Lead in Pflugerville - For Rental".
- Stages**: Points to the "New / Unclaimed" and "Claimed" tabs.
- Aproximate deal amount**: Points to the "\$2,250" value.
- Responsible person will change to you once you claim it**: Points to the "Unclaimed Lead" text.
- Contact name is the only information available until you claim it**: Points to the "FULL NAME Shaheed Shaikh" field.

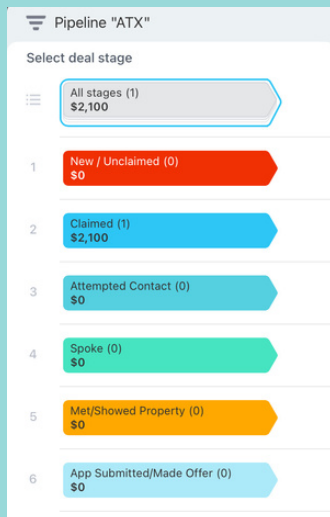
This information should be enough to help you decide whether you're interested in working the lead. If you are, go ahead and claim it!

Please keep in mind that the deal amount is an estimate, based on the client's expectations, budget, or the listing's posted sales price. This amount may change as you work with your client.

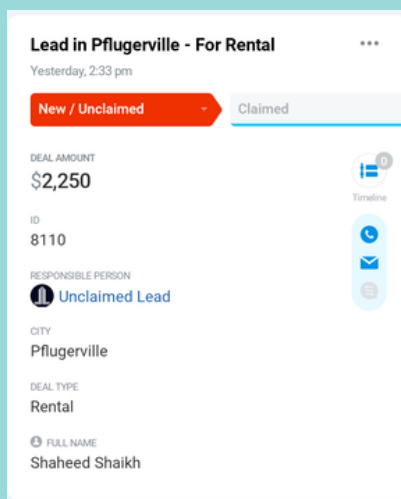
Once you claim a lead, you'll gain access to the full contact details, including the phone number and email (if provided by the client).

LET'S CLAIM IT!

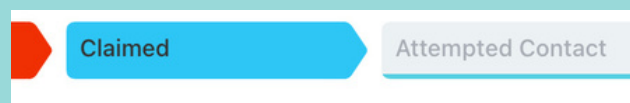
1. Navigate to Pipeline as soon as you get a new lead notification (remember to turn your notifications ON so you don't miss any deals!)
2. Navigate to New/Unclaimed.



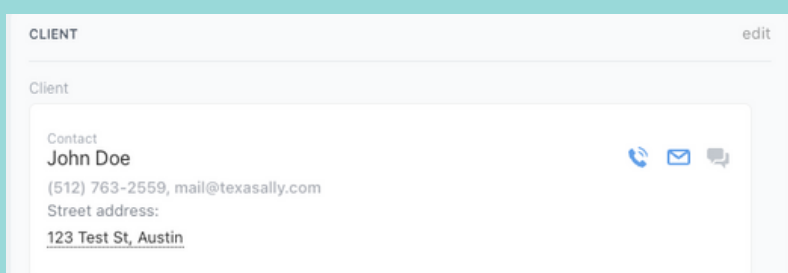
3. Select the lead you want to claim and change the stage to "Claimed" so the lead is assigned to you (you will show as Responsible Person).



How? Once in the lead, touch "New/Unclaimed", all the stages will show, select **Claimed** stage



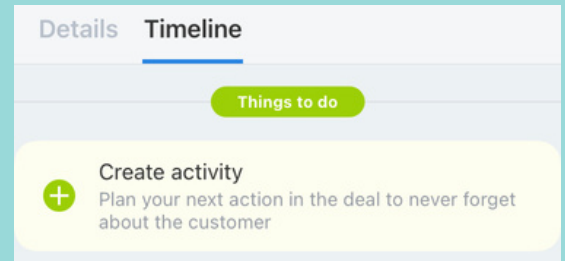
5. You will find the lead in the My Deals Section and their contact information details



HOW TO MANAGE A LEAD

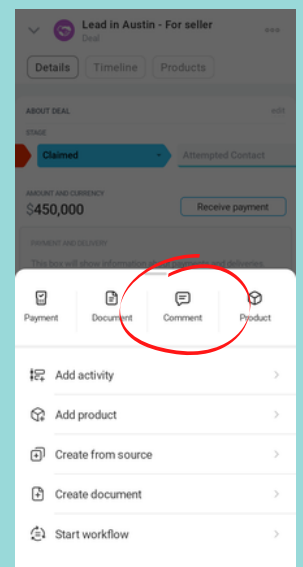
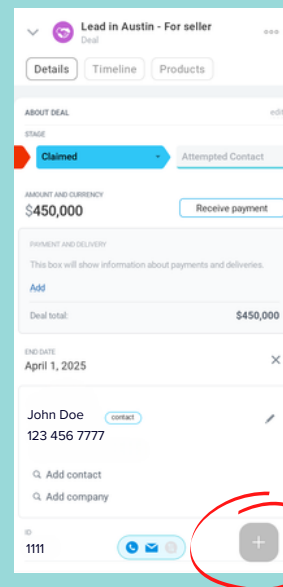
Timeline tab in your app

- New activities for each lead claimed will be added to the Timeline section.
- You can also plan activities. This will help you stay organized!



After reaching out:

- Change the stages accordingly, from "Claimed" to "Attempted contact" after your first reach out or "Spoke" if you were actually able to talk to the client, etc.
- Please update the lead with your notes, even if you were unable to contact the client (E.g.: called, no answer, left VM 12/15)
- To leave a note, touch + and then select "Comment"



This step
is crucial
for us

Keeping detailed notes not only supports our follow-ups in Bitrix24 but also allows us to evaluate the quality of leads, ensuring we focus on those worth posting in the future.

WHAT ' S NEXT?

If the contact is successful , you'll move the lead through the stages as you continue working with them. If the deal closes, the lead will eventually reach the **"Deal Won"** stage.



Based on our data, you should make **4-5 contact** attempts before deciding to let a lead go, as this gives you the best chance for success.

If the contact remains unresponsive after 4+ attempts or is no longer interested, please move the lead to **"Lost / Analyze Failure"**.



If the contact isn't ready to move forward just yet but will be in the near future, move them to **"Snags / Hold Ups"**, and be sure to include detailed notes explaining why.

If you fail to update your leads after a few days you will receive an email from b24leads@texasally.com requesting you to take action.

Thanks for helping us keep the pipeline accurate!

LEAD MISTAKENLY CLAIMED

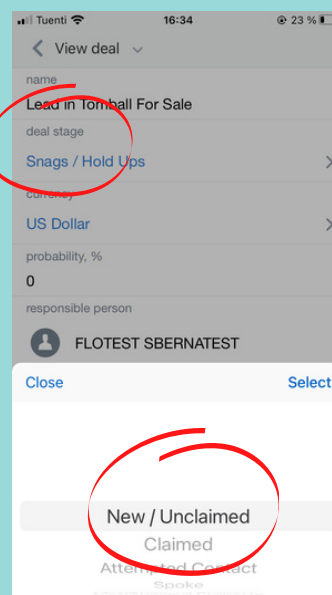
You can return a lead if you claimed it by mistake—but only in cases of genuine error.

If the lead didn't work out, or if you've already made contact but decided not to move forward, it cannot be put back.

In those situations, please reach out to our team at team@texasally.com, and we'll help you figure out the best next steps.

In order to put it back, you simply need to reverse the step.

1. Navigate to the deal stage.
2. Select New/Unclaimed.



KEYS TO SUCCESS

Expectations/Recommendations to continue getting more leads and closings



If you claim a lead, we want you to **IMMEDIATELY** make contact! Please leave your notes about the contact on the Deal. **Speed to contact is very important!**



The goal is to move the leads through the stages/deal statuses as effectively as possible.



Multiple frequent attempts for first contact from multiple mediums (call, text, email) greatly increase your odds of gaining a client.



Pro Tip > Email your lead right after speaking on the phone or leaving a voicemail so they have your contact info in hand. Don't forget to **add links to your reviews** so they know YOU are the right agent to help them!



Key metrics we are looking out for:

- Speed to contact, and actually WORKING the leads
- Number of leads getting to showings
- CRM/update activity
- MULTIPLE FOLLOW-UPS WITH THE CLIENT WORKS!!! People work and have other things going, you just have to catch them at the right time.
- ULTIMATELY: Close ratio!