SCOPE OF WORK | VERSION 1.0

Implementation Scope of Work

Webbee Group | Basic, Standard, Professional & Enterprise Packs

BASIC	STANDARD	PROFESSIONAL	ENTERPRISE
$588	**$1,188**	**$2,388**	**$4,788**
one-off setup	one-off setup	one-off setup	one-off setup
5 users | ~1 week	50 users | ~2 weeks	100 users | 3-4 weeks	250 users | 4-6 weeks

All prices USD | Implementation packs are standalone one-off fees, separate from Bitrix24 plan subscription

What this document defines

- Exactly what is configured in each pack
- The quantity limit for every deliverable
- The observable result that confirms each item is complete

How This Document Works

This Scope of Work defines precisely what is included in each Webbee Implementation Pack. Every deliverable is described in three parts:

Configured	What is set up in Bitrix24
Limit	The exact quantity included; anything beyond this is out of scope
Done when	The specific, observable result that confirms the item is complete

Any requirement not listed in this document is outside the scope of the pack.

Scope Change Protocol

If a requirement is identified that is not listed in this document, a quantity limit is exceeded, the client changes a confirmed decision after that item has been built, or a requirement needs custom development or third-party API integration — the item is classified as a scope change and separated into Phase 2. The specialist documents it in writing, shares it with the Webbee account manager, and continues in-scope work while Phase 2 is quoted.

Before Implementation Starts — Client Responsibilities

The following must be provided before implementation begins. Missing inputs extend the delivery timeline; delay caused by missing inputs does not extend the pack's service commitment.

REQUIRED FOR ALL TIERS:

- Company logo file (PNG or SVG, transparent background, minimum 400px wide)
- Chosen portal subdomain (e.g. yourcompany.bitrix24.com)
- User list: full name, business email, department, role/permission level
- Pipeline name(s) and stage names in sequence, finalised before work starts
- Automation rules specified in writing: trigger event and resulting action, per pipeline
- Admin credentials for email accounts to be connected
- Agreed CRM card layout: which fields appear, in which order, for each entity

STANDARD AND ABOVE — ADDITIONAL:

- Admin access to social media accounts/pages to be connected
- Web form fields and show/hide logic confirmed in writing before forms are built
- Document template content (text, layout, field mappings) in a Word or PDF draft

PROFESSIONAL AND ABOVE — ADDITIONAL:

- Phone number to be connected, or written confirmation to use a Bitrix24 rented line
- Workgroup name, purpose, member list, and Kanban stage names

ENTERPRISE — ADDITIONAL:

- All of the above at agreed scale for all channels, pipelines, and workgroups
- E-Sign document types and stage names confirmed in writing before configuration

BASIC IMPLEMENTATION PACK

Basic

A ready-to-use Bitrix24 portal for a small team. By handover, your team can log in, manage deals through a defined sales process, automate basic pipeline actions, and receive and send emails within the CRM.

Up to 5 users | ~1 week delivery | 1-hour consultation

ONE-OFF FEE

$588

USD | included in bundles

1 Portal Registration and Branding

Configured: Cloud portal registered under the client's chosen subdomain. Logo, company colour theme, and portal name applied.

Limit: One portal. One logo. One colour theme.

DONE WHEN:

- v Portal accessible at the agreed subdomain (e.g. company.bitrix24.com)
- v Company logo appears in the top-left header on login
- v Colour theme reflects the client's brand colours throughout the interface
- v Portal name displays correctly in browser tab and notification emails

Not included:

x Custom domain (own domain, not .bitrix24.com); white-label branding; multiple logo variants; animated or video branding

2 User Accounts

Configured: User accounts created, email credentials assigned, and standard permission roles applied per the agreed user list.

Limit: Up to 5 users.

DONE WHEN:

- v Each user receives a login invitation to the agreed email address
- v Each user can log in and access the portal
- v Each user is assigned to the correct permission group per the agreed user list
- v Users can see only what their role permits

Not included:

x User training; password management; SSO/Active Directory integration; accounts added after handover

3 Company Structure

Configured: Company department tree built in Bitrix24 to reflect the client's agreed organisational structure.

Limit: Up to 3 departments.

DONE WHEN:

- v Departments appear correctly in Bitrix24 > Company > Structure
- v Users are assigned to their correct department
- v Department-based filters return correct results in CRM

Not included:

x Sub-departments; reporting lines beyond department assignment; org chart visualisation

4 Bitrix24 General Settings

Configured: Core portal settings applied: portal name, timezone, language, currency, business hours, system email notifications.

Limit: Standard settings only. No custom integrations.

DONE WHEN:

- v Portal name matches the client's company name
- v Timezone displays correct local time for the primary operating location
- v Language set to the agreed language (English default)
- v Currency symbol and format is correct
- v Business hours set to agreed operating hours
- v System email notifications route to the correct administrator email

Not included:

x Multiple timezone support; multi-currency; custom notification templates

5 CRM: Pipeline Configuration

Configured: One CRM sales pipeline with agreed stage names in agreed sequence. CRM card layout optimised for Deals, Contacts, and Companies.

> **Limit:** 1 pipeline. Stages as agreed before implementation starts. Card layout for 3 entities: Deals, Contacts, Companies.

DONE WHEN:

- v CRM > Deals shows 1 named pipeline with stages in correct order
- v Deals can be created, moved between stages, and marked Won/Lost
- v CRM Deal card shows agreed fields in the agreed order, no irrelevant fields
- v Contact and Company cards show agreed fields in agreed order
- v Standard filters are active and return correct results

Not included:

x Multiple pipelines; SmartProcesses/SPAs; Lead pipeline; custom field types; CRM form builder

6 CRM: Access Permissions

Configured: Standard Bitrix24 permission presets applied. One custom permission role created per the agreed access matrix.

> **Limit:** Standard presets + 1 custom role.

DONE WHEN:

- v Users with each role can create, view, edit, and delete CRM records per the agreed matrix
- v The custom role restricts or grants access as specified
- v No user can access records beyond their permitted scope

Not included:

x More than 1 custom role; field-level permissions; time-based access; custom logic beyond native role system

7 CRM: Automation Rules

Configured: Standard automation rules and triggers configured on the pipeline per the agreed automation specification.

Limit: Up to 10 automation rules and triggers in total. Standard rules and triggers only.

DONE WHEN:

- v Each agreed rule fires correctly when its trigger condition is met
- v Automated actions (notifications, task creation, status changes, email sends) execute as specified
- v Rules visible in CRM > Automation and clearly named per the agreed spec

Not included:

x Custom Robot workflows; Business Process Designer workflows; custom code; rules exceeding 10 total

8 Communication Channels: Email

Configured: Up to 5 email mailboxes connected to Bitrix24 CRM with incoming and outgoing routing.

Limit: Up to 5 mailboxes. Standard OAuth (Google Workspace, Microsoft 365) or standard IMAP/SMTP only.

DONE WHEN:

- v Emails to each mailbox appear in the relevant CRM contact/deal activity timeline automatically
- v Emails from CRM records route through the correct mailbox
- v Incoming emails from known CRM contacts are matched and linked automatically
- v Notification sent to the assigned CRM user when a new email is received

Not included:

x Custom mail server troubleshooting; email routing rules beyond standard CRM matching; email templates; campaign setup

9 Consultation Session

Configured: One 60-minute online video session delivered upon completion of all items above.

Limit: 1 session x 60 minutes.

DONE WHEN:

- v Session conducted with agreed attendees via video call
- v All configured items demonstrated live in the portal
- v Client team can navigate to and operate each configured feature
- v Written summary of what was configured shared within 24 hours

Not included:

x User training beyond the single session; ongoing Q&A; after the session is complete

STANDARD IMPLEMENTATION PACK

Standard

A fully configured Bitrix24 portal for a growing team. Two sales pipelines with automation, CRM documents, web forms, live chat, one social channel, and a basic marketing campaign — all from within Bitrix24.

Up to 50 users | ~2 weeks delivery | 2-hour consultation

ONE-OFF FEE

$1,188

USD | included in bundles

UPGRADES FROM BASIC

Item	Basic	Standard
Users	5	**50**
Departments	3	**10**
CRM pipelines	1	**2**
CRM entities (card layout)	Deals, Contacts, Companies	**+ Leads**
Automation rules (total)	10	**20**
Custom CRM roles	1	**2**

ALL BASIC DELIVERABLES AT THE STANDARD SCALE, PLUS:

+ CRM: Document Templates

Configured: Up to 2 CRM document templates that auto-generate from CRM record fields (e.g. proposal, quote, contract cover sheet).

> **Limit:** 2 templates. Up to 2 pages per template. Standard CRM merge fields only. No conditional logic, no external data.

DONE WHEN:

- v Each template accessible from the relevant CRM entity (Deal, Contact, or Company)
- v Clicking 'Generate Document' produces a correctly formatted document with live CRM field data populated
- v Generated documents can be downloaded as PDF or Word
- v Template layout matches the draft provided by the client

Not included:

x Templates exceeding 2 pages; conditional content blocks; data from outside CRM; template design from scratch; more than 2 templates

+ CRM: Web Forms (x2)

Configured: 2 CRM web forms that capture submissions and create records in Bitrix24 CRM automatically.

> **Limit:** 2 forms. Up to 8 fields per form. Up to 2 show/conditional rules per form. Single-page forms. Standard design only.

DONE WHEN:

- v Each form accessible at a Bitrix24-hosted URL and produces an embeddable HTML snippet
- v Form submission creates the correct CRM record type with fields mapped correctly
- v Agreed show/hide rules activate correctly based on field values
- v Notification sent to the agreed CRM user upon each submission
- v Form has client's logo and brand colours applied using Bitrix24's native styling

Not included:

x Custom CSS or JavaScript; multi-page forms; conditional logic exceeding 2 rules per form; payment-connected forms

+ Communication Channels: Live Chat

Configured: Bitrix24 live chat widget set up and routed to the agreed operator group.

> **Limit:** 1 live chat widget. Routing to 1 operator group.

DONE WHEN:

- v Live chat widget embed code generated and provided to the client
- v Incoming chats appear in Bitrix24 > Open Channels and routed to the agreed operator group
- v New CRM contact created automatically when a new visitor initiates chat
- v Offline message handling routes to the agreed email or CRM queue
- v Operators can respond to chats from within Bitrix24

Not included:

x Chatbot scripts; multiple chat widgets; routing to more than 1 group; installation on client's website (embed code provided only)

+ Communication Channels: Social/Messaging Channel (x1)

Configured: 1 social or messaging channel connected to Bitrix24 Open Channels with CRM routing.

Limit: 1 channel (Facebook Messenger, Instagram Direct, or Telegram). 1 account per channel.

DONE WHEN:

- v Messages received on the connected channel appear in Bitrix24 > Open Channels
- v Operators can read and reply from within Bitrix24
- v Conversations linked to the correct CRM contact record automatically
- v New contacts created in CRM when a conversation arrives from an unrecognised sender

Not included:

x More than 1 channel; multiple accounts per channel; automated message flows; WhatsApp Business (separate integration)

+ Marketing Module

Configured: Marketing module activated. 1 campaign template created. 1 customer segment defined and saved.

Limit: 1 campaign template. 1 customer segment. Standard Bitrix24 email marketing channel only.

DONE WHEN:

- v Marketing module appears in Bitrix24 navigation and accessible to permitted users
- v 1 email campaign template exists with client branding, ready to use for a campaign send
- v 1 customer segment saved using agreed filter criteria, populates correctly from CRM contacts

Not included:

x Campaign execution or sending; SMS campaigns; advanced segmentation; marketing automation sequences; ad platform connections

PROFESSIONAL IMPLEMENTATION PACK

Professional

A comprehensive setup for a mid-size team with multi-pipeline CRM, telephony, task management, and full contact centre capability across 3 pipelines, 30 automation rules, Bitrix24 telephony, and a project workgroup.

Up to 100 users | 3-4 weeks delivery | 4-hour consultation

ONE-OFF FEE

$2,388

USD | included in bundles

UPGRADES FROM STANDARD

Item	Standard	Professional
Users	50	**100**
Departments	10	**20**
CRM pipelines	2	**3**
Automation rules (total)	20	**30**
Custom CRM roles	2	**4**
Document templates	2	**3**
CRM web forms	2	**4**
Web form fields	8	**12**
Web form show rules	2	**4**
Social/messaging channels	1	**2**
General settings	Standard	**+ Worktime tracking**

EVERYTHING IN STANDARD AT THE PROFESSIONAL SCALE, PLUS:

+ Communication Channels: Telephony (1 line)

Configured: 1 phone line connected to Bitrix24. Up to 3 call queues/departments configured with standard routing rules. Incoming and outgoing calls operational.

Limit: 1 phone line. Up to 3 call queues. Standard call routing only. Line rental and SIP connector subscription fees are not included in the pack price.

DONE WHEN:

- v Incoming calls ring in Bitrix24 for the assigned operators
- v Outgoing calls can be initiated from within Bitrix24 (CRM record or dialler)
- v Each completed call creates a call activity record linked to the matching CRM contact or deal
- v Missed calls create an activity record and trigger the agreed notification
- v Calls routed to the correct queue based on the agreed routing rules
- v Basic call statistics visible in Bitrix24 > Telephony reports

Not included:

x IVR tree configuration; custom on-hold audio or recorded greetings; voicemail setup; more than 1 phone line; more than 3 call queues; number porting

+ Tasks and Projects: Workgroup (x1)

Configured: Tasks module general settings applied. 1 workgroup created and configured with agreed Kanban stages and member assignments.

Limit: 1 workgroup. Standard Kanban stages and standard task fields. Permission matrix on standard roles only.

DONE WHEN:

- v Tasks module accessible to assigned users with correct permissions
- v Workgroup appears in Bitrix24 > Workgroups with the agreed name
- v Kanban board shows agreed stages in correct order
- v Assigned members can create, assign, move, and complete tasks within the workgroup
- v Task filters work correctly for assigned members

Not included:

x Kanban automation; custom task fields; task templates; time tracking configuration; Gantt chart setup; more than 1 workgroup

ENTERPRISE IMPLEMENTATION PACK

Enterprise

A full-scale Bitrix24 deployment. 7 CRM pipelines, 70 automation rules, full contact centre (all channels, 2 phone lines, 5 call queues), 3 project workgroups, E-Sign, and a written configuration report documenting every setting, role, and permission configured.

Up to 250 users | 4-6 weeks delivery | 8-hour sessions + written report

ONE-OFF FEE

$4,788

USD | included in bundles

UPGRADES FROM PROFESSIONAL

Item	Professional	Enterprise
Users	100	**250**
Departments / branches	20	**30**
CRM pipelines	3	**7**
Automation rules (total)	30	**70**
Custom CRM roles	4	**6**
Document templates	3	**5**
CRM web forms	4	**5**
Web form fields	12	**15**
Web form pages	1	**Up to 2**
Social/messaging channels	2	**All 3 (FB + IG + TG)**
Phone lines	1	**2**
Call queues	3	**5**
Workgroups	1	**3**
General settings	+ Worktime	**+ Employee groups + Access structure**

EVERYTHING IN PROFESSIONAL AT THE ENTERPRISE SCALE, PLUS:

+ E-Sign Module

Configured: E-Sign module activated and configured for up to 3 document types, with up to 5 stages per document type and standard automation rules for the signing workflow.

> **Limit:** 3 document types. Up to 5 stages per document type. Internal Bitrix24 signing workflow only. Standard automation rules only.

DONE WHEN:

- v E-Sign module accessible to permitted users
- v Each document type has a defined stage sequence (e.g. Draft, Sent, Signed, Archived)
- v Documents can be initiated, progressed through stages, and completed within Bitrix24
- v Agreed automation rules fire correctly (notification on stage change; status update when signed)
- v Access permissions correctly restrict which users can initiate, sign, and view each document type

Not included:

x External signer workflows (non-Bitrix24 users signing via email link); DocuSign, Adobe Sign, etc.; complex multi-party approval chains; more than 3 document types

+ Enterprise General Settings: Groups and Access Structure

Configured: Employee groups created, access structure configured for enterprise-scale permission management.

> **Limit:** Standard Bitrix24 employee group and access structure tools only.

DONE WHEN:

- v Employee groups reflect the agreed organisational access structure
- v Group-based permissions are consistent with the agreed access matrix
- v Department heads or group managers have the agreed administrative access over their group's members

+ Written Configuration Report

Configured: 8-hour online consultation session(s) plus a written configuration report delivered within 5 business days of session completion.

> **Limit:** 8 hours total (may be split across sessions). Report delivered within 5 business days of final session.

DONE WHEN:

- v All 8 hours of consultation conducted with agreed attendees
- v Written report covers: all pipelines, stages, automation rules; all user roles and permission matrices; all connected channels; all document templates and web forms; all workgroup configurations; E-Sign document types and stage sequences; general settings reference
- v Report delivered as PDF or Word document to the agreed client contact within 5 business days

General Exclusions — All Packs

The following are excluded from every implementation pack regardless of tier. They may be scoped and quoted as separate Phase 2 or custom engagements.

Data and Migration

- x Import or migration of any data from any source (spreadsheets, previous CRM, databases, email history)
- x Data cleansing or deduplication

Development and Integration

- x Custom development, scripting, or code of any kind
- x Custom Robot workflows or Business Process Designer automation
- x API integrations with third-party systems
- x Marketplace application setup or subscription (can be quoted separately)

CRM Entity Scope

- x SmartProcess (SPA) custom entity configuration
- x Custom CRM field types beyond standard Bitrix24 field types

Training

- x User training beyond the consultation session(s) included in each pack
- x Team onboarding sessions
- x Written user guides or training materials

Infrastructure

- x Telephony line rental or SIP connector subscription fees
- x Phone number registration or porting
- x Custom domain setup (own domain instead of .bitrix24.com subdomain)

Ongoing Support

- x Post-implementation support (available as a separate Annual Support Package)
- x Bug fixes caused by client-made changes after handover
- x Configuration updates or additions after handover

Scope

- x Any second Bitrix24 portal
- x Any item not explicitly listed in the relevant pack scope above

Acceptance and Handover

Implementation is considered complete and the pack is delivered when:

1. All scope items in the relevant pack are configured and individually verified
2. The consultation session(s) are completed
3. A written handover summary (Basic/Standard/Professional) or full configuration report (Enterprise) is delivered to the client
4. The client has confirmed receipt of login credentials and can access the portal

Post-handover: any configuration changes, additions, or corrections arising from client decisions made after sign-off are treated as Phase 2 items and quoted separately.