

Bitrix24[®]

Accelerating document approval by 60% in a construction company



About the client

The client is a dynamically developing construction company specializing in complex contract work in the field of civil and industrial construction. The company employs 83 specialists, including engineers, designers, foremen, and project managers.

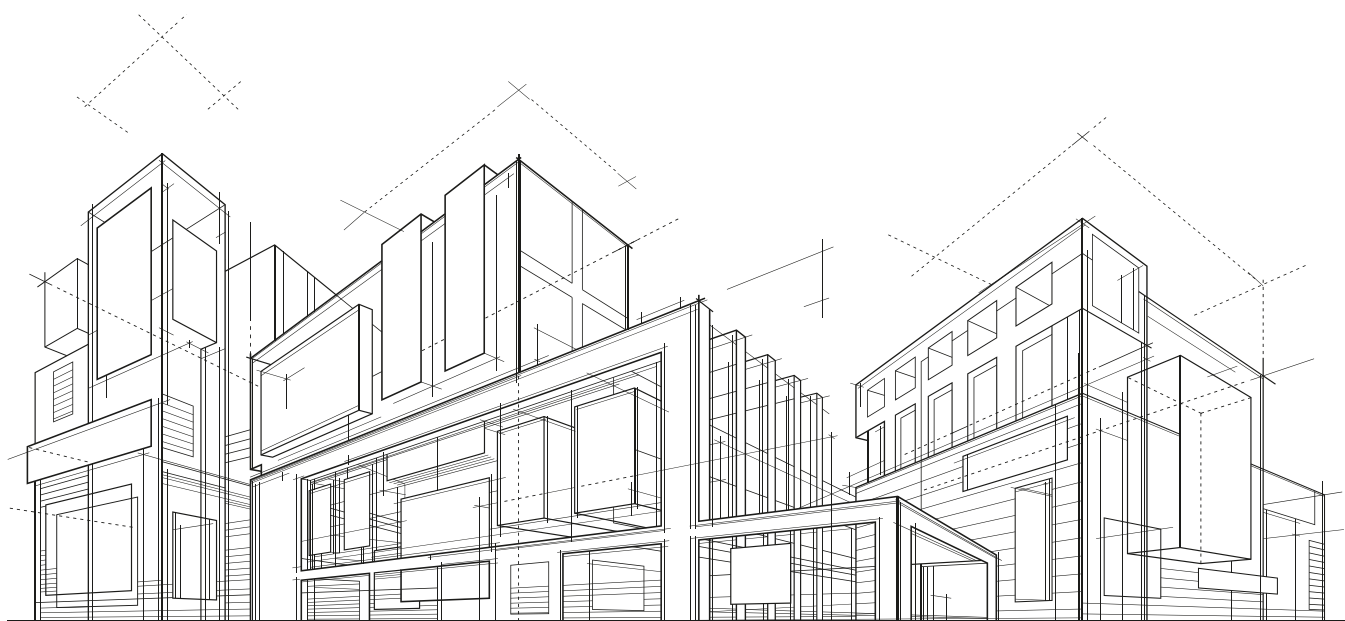
The client's initial request was the introduction of some sort of automation into their document workflows to reduce paperwork and streamline the approval processes, and we started from there.

Project name: CRM + workflow automation platform

Completed in: 2025

Industry: construction

Bitrix24 edition: On-premise



Project overview

Key challenges	How Bitrix24 helped to solve them
✗ Excessive time spent on paperwork and document processing	✓ Automated document workflows
✗ Slow approval processes for contracts and payments	✓ Streamlined contract and payment approvals
✗ Fragmented and disjointed payment accounting	✓ Centralized and automated payment accounting
✗ Time-consuming manual report generation	✓ Automated report generation

Post-implementation success metrics



**Up to 10 hours
per week**

saved on report reconciling



**From 5 days
to 1–2 days**

reduced approval time



Zero downtime

during Bitrix24
implementation



70% reduction

in time spent on document
handling

Background

At the beginning of this project, we sat down with the client to discuss their expectations and the key problems they were looking to solve with the help of Bitrix24. Among those were:

- Paperwork and document processing took **up to 4 hours daily**
- Contract and payments approvals took **up to 5 days**
- Disjointed payment accounting: records were kept in **multiple tables**
- Manual report generation took **up to 30% of employee working time**

Based on the input data, we formulated the criteria for successful Bitrix24 implementation:

- CRM + comprehensive payments and approval workflow automation
- Minimum (preferably no) downtime and flexibility of customization
- Bitrix24 had to be hosted on the client's servers

Implementation

The implementation process itself consisted of the following stages:



Deploying Bitrix24 on the client's server

- Activation of the on-premise license, installation of SSL, and security settings
- Setting up corporate webmail and backup
- Customization of the interface to match the client's corporate style



Setting up the company structure

- Creating internal hierarchy of departments and subdepartments, assigning supervisors, deputy supervisors, etc.
- Setting up access permissions



Basic CRM setup

- Sales pipelines
- Creating two custom entities in CRM: **Contracts and Construction Sites**



"Document approval" workflow

- Setting up approval hierarchy: **applicant** → **technical office** → **financial department** → **General Manager**
- Setting up stages, conditions, and notifications
- Integration with Online Documents in Bitrix24
- Test runs and employee training



"Construction project management" workflow

- Project structuring: tasks, deadlines, assignees
- Automated reports on project stages and budget
- Integration with the Calendar in Bitrix24
- Practical training for project managers



Smart Process Automation – "Payments"

- Creation of a unique entity "**Payment**" in CRM, featuring the following fields: amount, date, link to contract, status, type of funds, project
- Defining the logic of automatic calculation of the balance and update after each payment
- Approval workflow: **applicant** → **technical office** → **financial department** → **General Manager** → "**Payment initiated**" status → "**Payment completed**" status
- Setting up notifications and access permissions to ensure each stage is completed on time

Results

The implementation of Bitrix24 has allowed the client to significantly optimize financial and management processes, increasing the overall efficiency of the company.

One of the key results was a **70% reduction** in the time spent on working with documents and payments. This became possible due to the automation of routine operations, such as:

- creating invoices
- approving contracts
- tracking payments

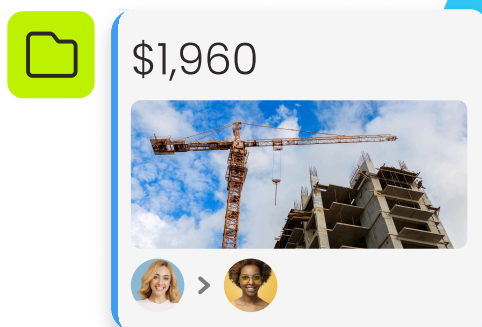
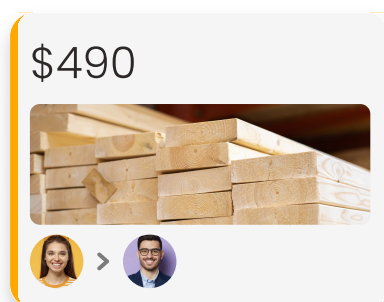
The time for approving contracts and payments was also reduced – **from 5 days to only 1–2 days**, which allowed the team to complete projects faster, reducing the risk of delays. The system provided full control over the budget: now the final report on balances is available in one click, which simplifies financial planning and allows for prompt management decisions.

The **transparency** of internal processes has also increased significantly – each employee sees their stage of task completion, and the manager receives instant notifications about key events and can step in if necessary. This increased the discipline and responsibility of employees, and also reduced the number of errors and delays.

In addition, the implementation of Bitrix24 allowed the management to **save time** – now they do not need to spend up to 10 hours a week on manual reconciliation of reports. Saving time allows managers to focus on strategic tasks and business development.

Summary

The implementation of Bitrix24 has become an important step in the digitalization of the client's company, which has **increased transparency, reduced the time** it takes to complete operations, and **improved the overall management efficiency**.



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demo and consultation.

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