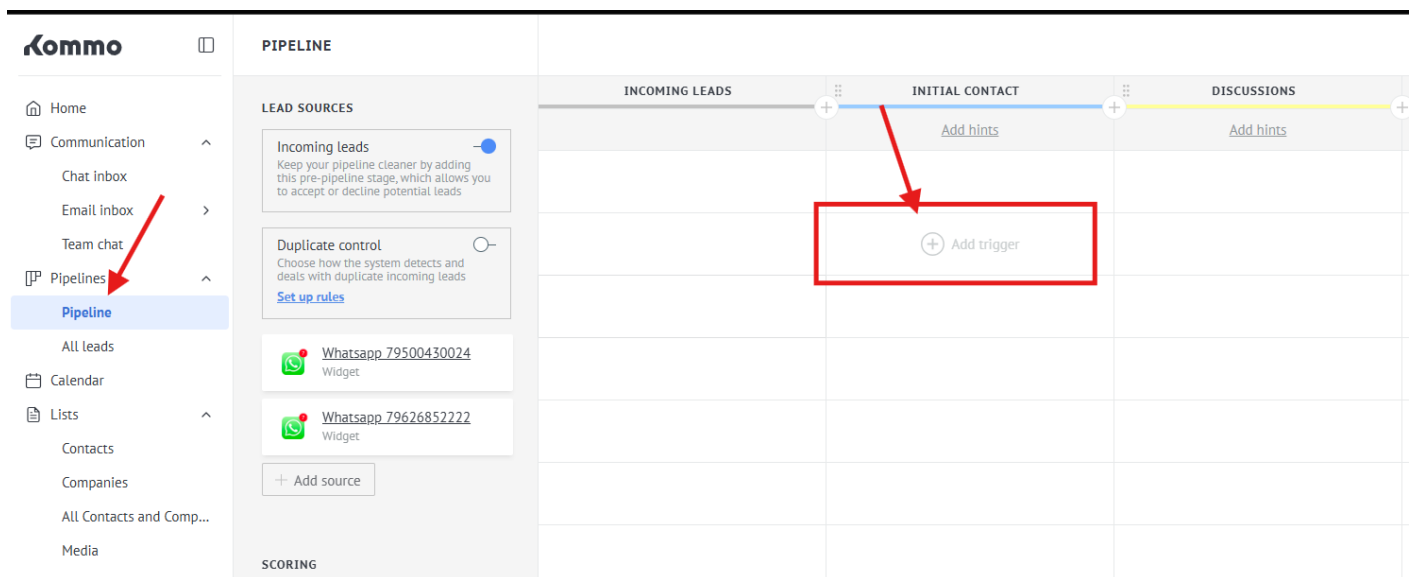


Sending template messages using Salesbot

In this guide, we will show you how to send template messages using Salesbot.

1. First of all, you need to go to the "Pipeline" and choose a stage, where do you want to use your Salesbot

In my case, this is the "Initial contact" stage.

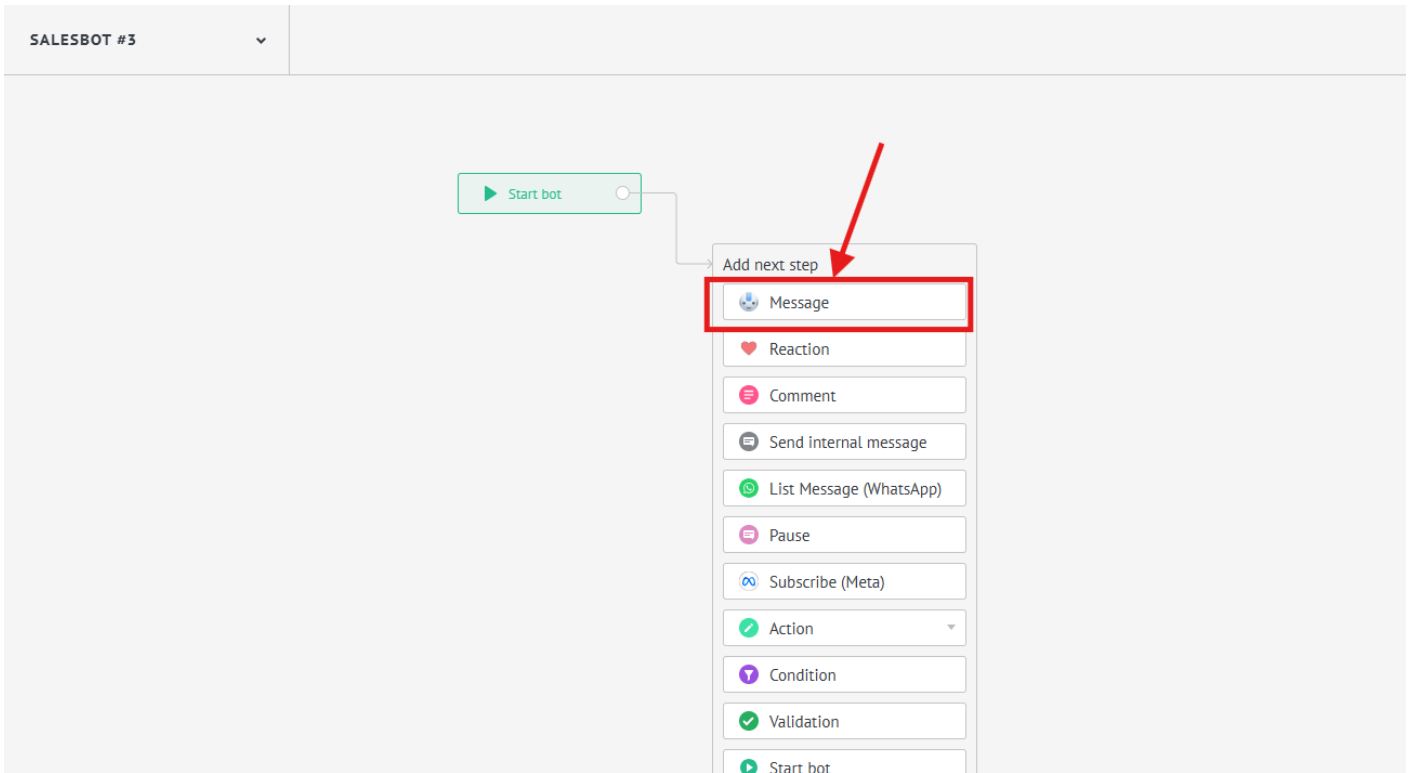


The screenshot shows the Kommo CRM interface. On the left, a navigation menu includes 'Home', 'Communication', 'Chat inbox', 'Email inbox', 'Team chat', 'Pipelines', 'All Leads', 'Calendar', 'Lists', 'Contacts', 'Companies', 'All Contacts and Comp...', and 'Media'. The 'Pipelines' section is expanded, and 'Pipeline' is selected. The main area displays a pipeline with three stages: 'INCOMING LEADS', 'INITIAL CONTACT', and 'DISCUSSIONS'. The 'INITIAL CONTACT' stage is highlighted in blue. Below the stage names, there are 'Add hints' buttons. In the 'INITIAL CONTACT' stage, a red box highlights a '+ Add trigger' button. The 'LEAD SOURCES' section on the left includes 'Incoming leads', 'Duplicate control', and two WhatsApp widgets with phone numbers 79500430024 and 79626852222. There is also an '+ Add source' button.

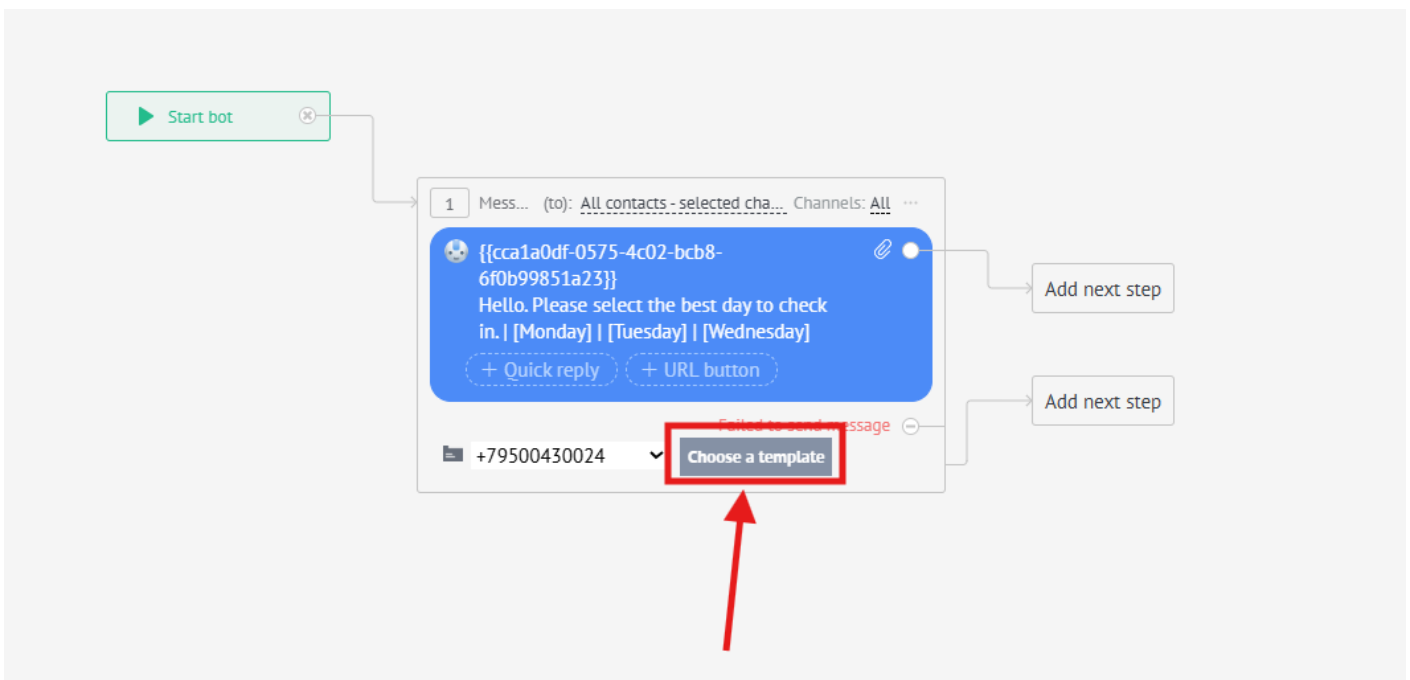
2. Press "Add trigger" -> "Salesbot" -> "Create a new bot"

INITIAL CONTACT	DISCUSSIONS
Add hints	Add hints
After moved to this stage Run Salesbot: Salesbot #	
<p>For all leads with:</p> <p>Add a condition</p> <p>Execute: After moved to this stage</p> <p>The message will be sent to contacts who have communicated with you on the chat apps you have integrated</p> <p>Active: Always</p> <p>Leave message unanswered <input type="checkbox"/></p> <p>Messages that Salesbot responds to will be marked as unanswered</p> <p>Salesbot</p> <p>No bot selected or + Create a new bot</p> <p>Create a new bot or select from an existing one</p> <p><input type="checkbox"/> Apply the trigger to all leads already in this stage</p> <p>Done Cancel</p>	

3. Choose "Message" step



4. After that, select the template you want to use for sending.



Done. Now all your deals that move to the **"Initial contact"** stage will receive the template you selected.

Note: At the moment, adding files of the following formats is available: **.png, .jfif, .jpeg, .jpg, .pjp, .jpg, .bmp, .dib, .webp, .m4v, .mp4** - the bot supports all video formats that can be chosen to send

Revision #3

Created 2026-04-17 19:39:43 UTC by Kirill K

Updated 2026-04-18 15:09:01 UTC by Kirill K