Make.com Automation Import Guide

How to import your broker automation blueprints

Your TBT Skills Pack includes ready-made Make.com scenarios for lead ingestion, document chasing, and settlement milestone notifications.

This guide walks you through importing them into your Make.com account in under 5 minutes.

Lead Ingestion & Notification

make-lead-ingestion.json

Watches for new leads from your website, referral partners, or lead providers. Automatically formats the lead data, creates a CRM record, sends you an instant notification (email + SMS), and triggers a welcome email to the client. Replaces: Manual lead entry, missed enquiries, delayed follow-up.

Document Chase — Automated Reminders

make-document-chase.json

Monitors your outstanding document list and automatically sends friendly reminder emails to clients at set intervals (3 days, 7 days, 14 days). Escalates to phone call task if documents still missing after 14 days. Includes personalised merge fields and tracks which docs are still outstanding. Replaces: Manual follow-up emails, forgotten document requests, admin time.

Settlement Milestones — Client Notifications

make-settlement-milestones.json

Tracks key milestones from approval to settlement and sends automated updates to your client at each stage: conditional approval, valuation booked, valuation received, formal approval, settlement booked, settlement confirmed. Keeps clients informed without you lifting a finger. Branded to your business. Replaces: Manual status update calls/emails, anxious clients chasing you.

Also included: Zapier versions

If you use Zapier instead of Make.com, matching blueprints are in the automations/ folder too.

1 Log in to Make.com

Go to make.com and sign in (or create a free account).
Free accounts include 1,000 operations/month — enough to start.

2 Create a New Scenario

Click "Create a new scenario" from your dashboard.
You'll see a blank canvas — don't add any modules yet.

3 Open the Import Menu

Click the three dots (...) or "More" at the bottom of the screen.
Select "Import Blueprint" from the menu.

4 Paste the Blueprint JSON

Open the .json file from your TBT pack (e.g. make-lead-ingestion.json).
Select all the text (Ctrl+A / Cmd+A), copy it (Ctrl+C / Cmd+C).
Paste it into the Make.com import dialog and click "Save".

5 Connect Your Accounts

Make.com will show each module needing a connection (email, CRM, etc.).
Click each one and sign in to connect your accounts.
Common connections: Gmail/Outlook, your CRM, Twilio (for SMS).

6 Customise & Activate

Review each module — update email templates, phone numbers, field mappings.
Click the toggle in the bottom-left to turn the scenario ON.
Set the schedule (e.g. "Every 15 minutes" or "Once a day").

Pro Tip: Test Before Going Live

Use Make.com's "Run once" button to test each scenario with sample data before turning it on. This catches any missing connections or field mapping issues.

Making It Yours

Email Templates

Each scenario includes placeholder email copy. Replace with your brand voice, add your logo, and update the 'From' name to match your business.

CRM Fields

The blueprints map to common CRM fields. If your CRM uses different field names, update the field mappings in each module. Refer to the CRM-Field-Mapping.xlsx spreadsheet included in your pack.

SMS Notifications

If you want SMS notifications, connect a Twilio account (free trial available). Otherwise, just delete or disable the SMS modules — the rest will work fine.

Timing & Schedules

Document chase reminders default to 3/7/14 days. Adjust these in the delay modules to match your practice. Settlement milestones trigger on status change, so no schedule needed.

Common Issues

"Connection required" error

Click the module showing the error, then click 'Add' to connect your account for that service.

"Invalid JSON" on import

Make sure you copied ALL the text from the .json file. Open it in a text editor (Notepad/TextEdit), Ctrl+A to select all, then copy.

Scenario runs but nothing happens

Check that your trigger module is set to the right data source (correct email inbox, correct CRM pipeline, etc.).

Emails going to spam

Use a verified sending domain. If using Gmail, send from your business email, not a generic @gmail.com address.

We're here to help

If you get stuck importing a blueprint or need help customising a scenario for your brokerage, just reach out.

matt@thebrokertimes.com.au

Quick Reference

Blueprint File	What It Does	Runs
make-lead-ingestion.json	Captures leads, creates CRM record, notifies you	On new lead
make-document-chase.json	Sends reminder emails for missing documents	Daily check
make-settlement-milestones.json	Updates clients at each settlement stage	On status change
zapier-lead-ingestion.json	Same as above — Zapier version	On new lead
zapier-document-chase.json	Same as above — Zapier version	Daily check
zapier-settlement-milestones.json	Same as above — Zapier version	On status change

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