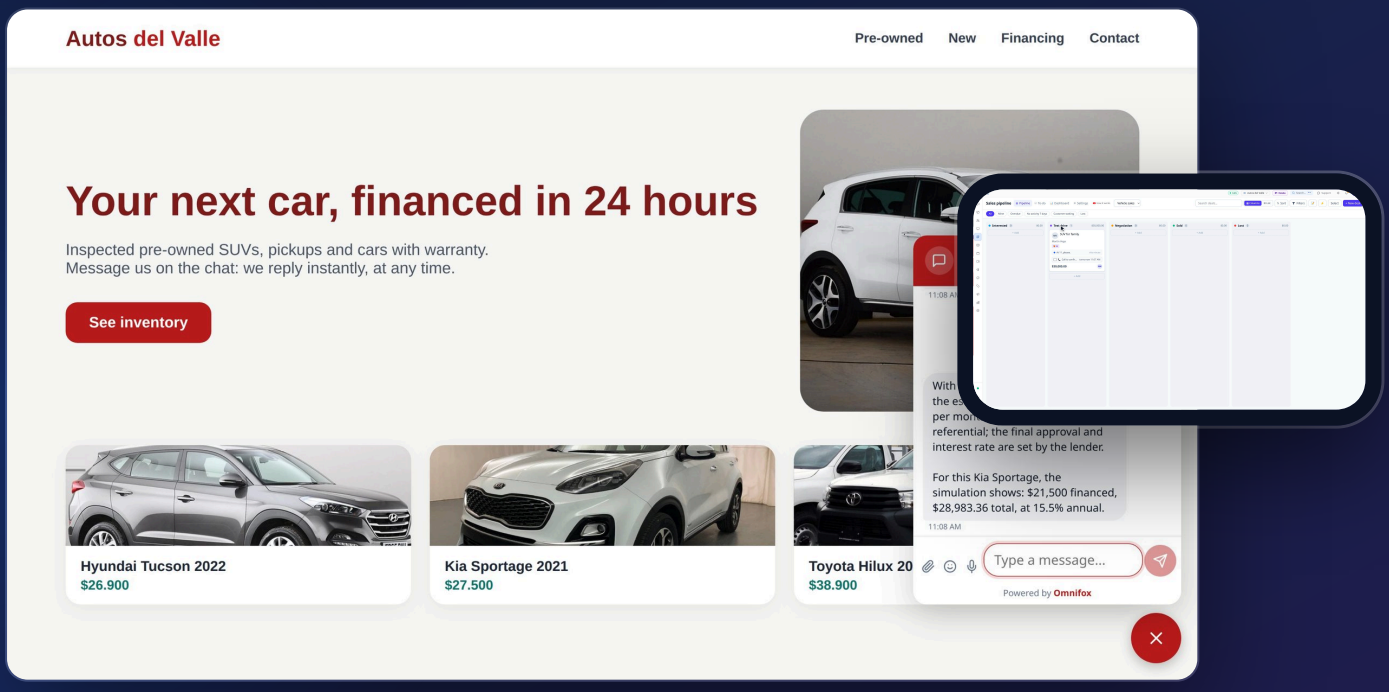
Omnifox

USE CASE · STEP-BY-STEP RECIPE

Car dealership: from chat to test drive

Vehicle inventory, an AI agent that shows cars, simulates financing and books the test drive, CRM and distribution to your sales agents, all connected.



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Car dealership: from chat to test drive

Hi! This is the same use case as the real estate agency, but for a car dealership: the artificial intelligence answers the chat, shows real cars, estimates the monthly loan payment and books the test drive, and the sales agent gets the customer with everything ready.

The example is Autos del Valle, a fictional dealership in Quito. Everything you see really happens in the chat on its website.

WATCH THE VIDEO

https://youtu.be/wUcAVHiUdwk

WHAT YOU NEED

- Vehicles module (Catalog → Modules, free per workspace).
- An AI agent on the Swift or Pro tier.
- CRM with a sales pipeline.
- Workflows (distribution and tasks).
- A calendar with your sales agents' hours.
- A channel: website chat, WhatsApp, Instagram or Messenger.

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The recipe

1. Team and contact record

1. Settings → Workspace → Teams: «Advisors» team (Round-robin).
2. Settings → Workspace → Custom fields: uso, tipo_vehiculo, presupuesto and forma_pago (text, on Contact).

2. The inventory

1. Catalog → Modules: turn on Vehicles.
2. Vehicles → New vehicle (or Import): make, model, year, mileage, price, transmission and photos by angle.
3. Publish only what the AI may offer; sold or reserved units are never offered.

3. Test drives, financing and CRM

1. Calendar: create «Test drives» with your opening hours.
2. Vehicles → Settings: Accept test drives (length and calendar).
3. Financing: minimum down payment, maximum term and reference annual rate (without a rate the AI does not estimate payments).
4. CRM and notifications: Create a deal in the CRM, «Vehicle sales» pipeline and first stage.

4. The AI agent

1. Instructions: qualify (use, type, budget, payment method), save each answer, offer at most three cars, estimate the payment, book the test drive and hand over to Advisors if they want to negotiate or trade in their car.
2. Tools: Search vehicles, Send vehicle photos, Simulate financing, Book a test drive, Update contact fields, Assign to agent or team.
3. Create CRM opportunity: «shows interest» → Interested; «an appointment was booked» → Test drive.
4. Connections: connect the agent to the website chat or your channel.

5. Distribution

1. Workflows → New: trigger Deal created → Assign deal owner (Round robin within Advisors) → Create follow-up task (Call, deal owner). Save and set it Active.

6. Test it

1. Write on your chat as a customer: look for a car, ask for photos, ask about the monthly payment and book the test drive.
2. Check the deal in the CRM (owner and task) and the test drive in the Calendar.

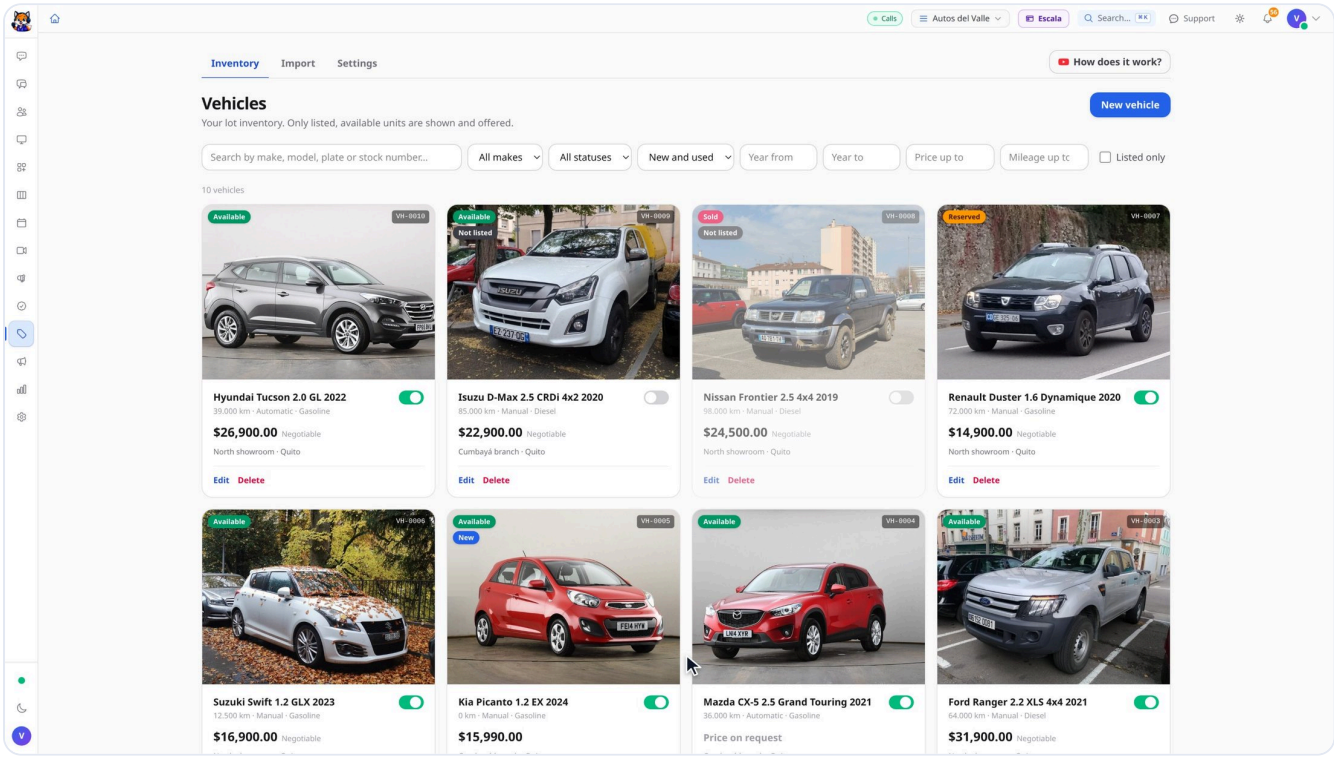
01

VIDEO STEP 1

The vehicle inventory

In Vehicles you have the inventory: each car with its make, year, mileage, price, status and photos.

Just like with properties, the AI only offers what is published and available: it never offers what is sold or reserved.



02

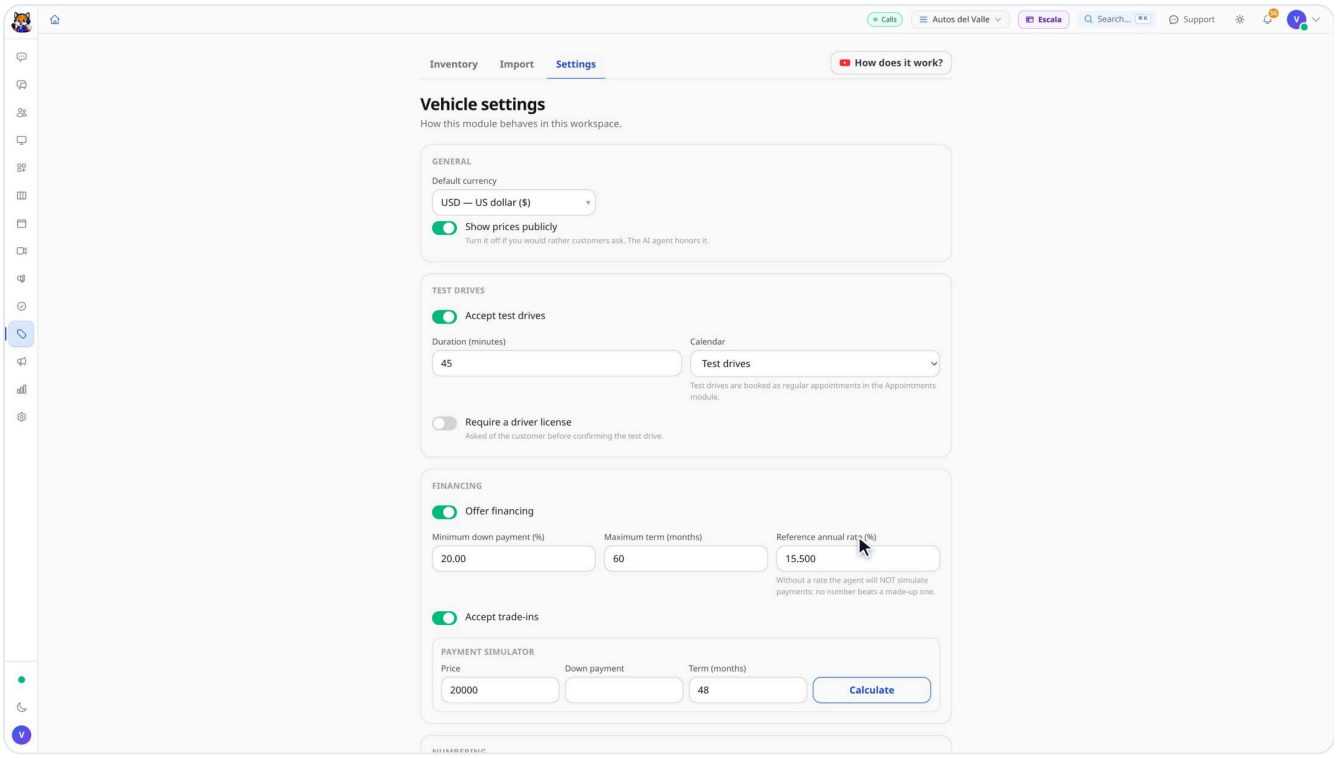
VIDEO STEP 2

Test drives, financing and CRM

In the vehicle settings I turned on test drives, forty-five minutes long, in the Test drives calendar.

In Financing I entered the minimum down payment, the maximum term and the reference annual rate: without a rate, the AI does not estimate payments.

And in CRM and alerts: every lead creates a deal in the Vehicle sales pipeline.



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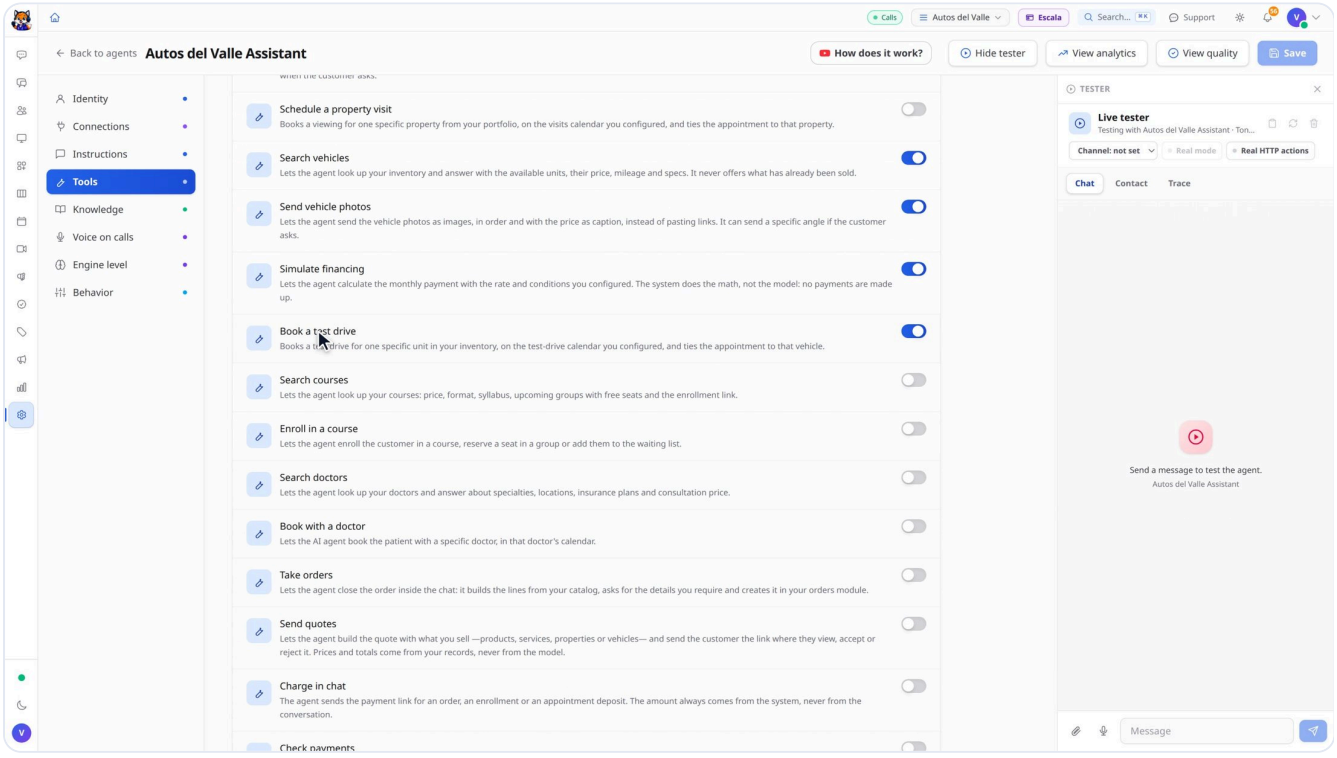
VIDEO STEP 3

The AI agent

The agent has the inventory tools: Search vehicles, Send vehicle photos, Simulate financing and Book a test drive.

And the CRM rules: when the customer shows interest the deal opens, and when the test drive is booked it moves to the Test drive stage by itself.



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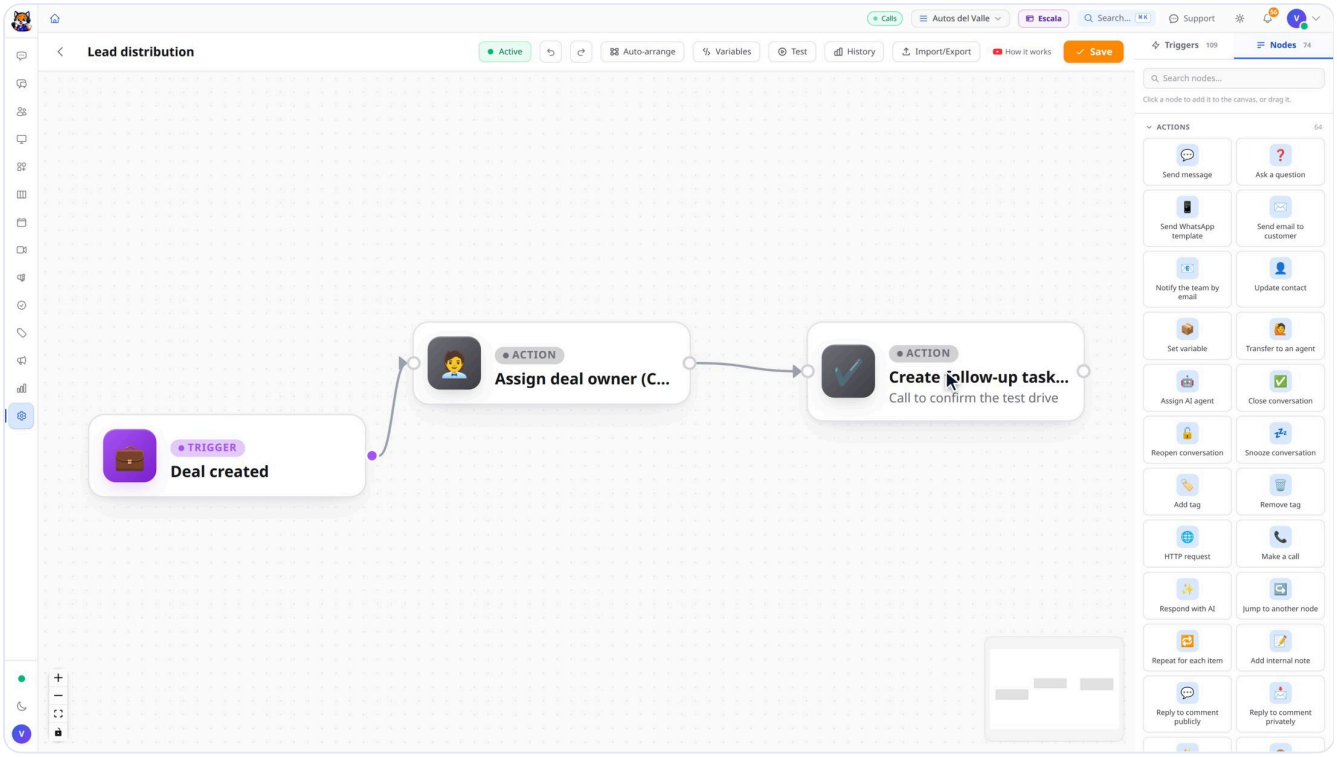
VIDEO STEP 4

The same distribution workflow

Distribution is the same workflow as in the real estate case: every new deal is assigned in rotation within the Advisors team and gets a follow-up call for its owner.



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VIDEO STEP 5

A customer writes in

Martín visits the Autos del Valle website and writes: he is looking for an automatic SUV up to thirty thousand dollars.

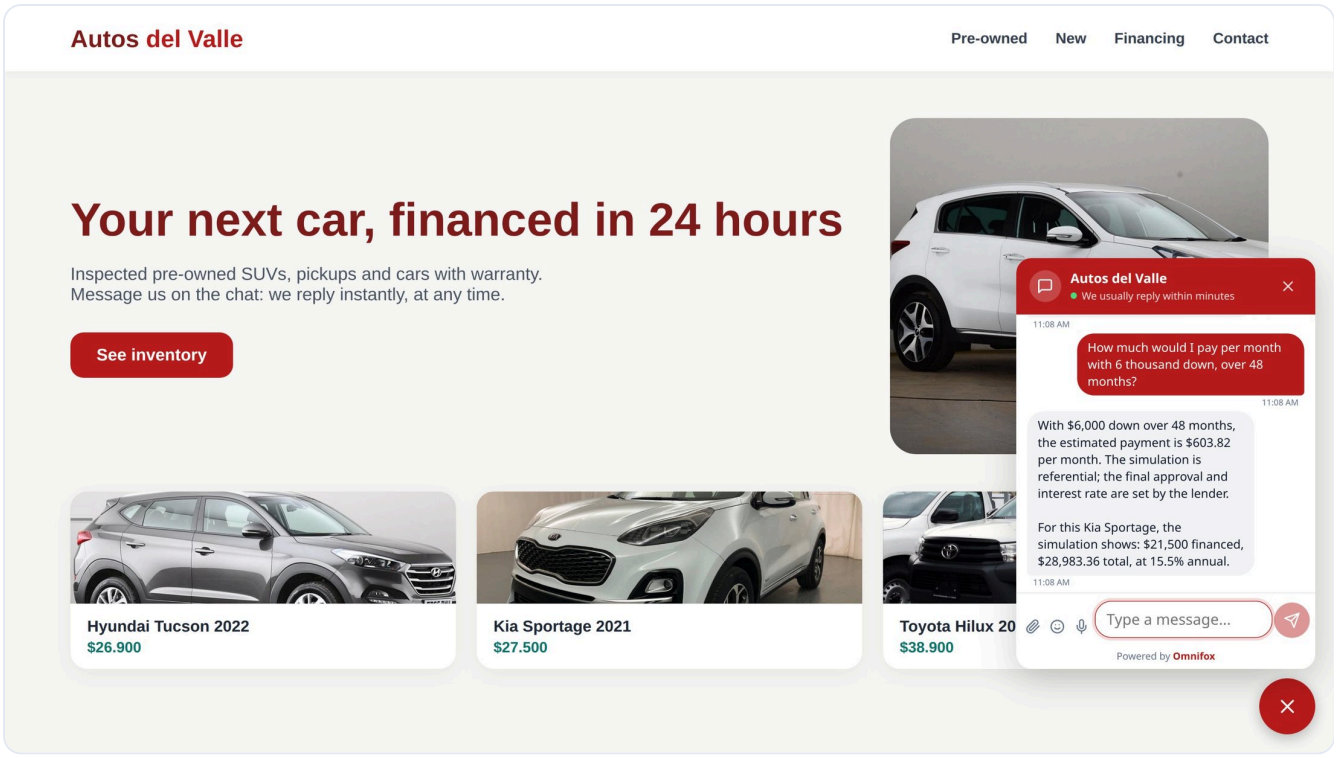
The AI searches the inventory and shows him the two that fit, with year, mileage and price.

He likes the Kia Sportage and asks for photos: the real inventory photos arrive.

He asks how much he would pay per month with six thousand down over forty-eight months. The AI estimates the payment with the rate we entered and explains it is a reference.

He wants to try it. The AI asks for his name and phone number and offers the free time slots in the calendar.

Martín picks one, and the test drive is booked.



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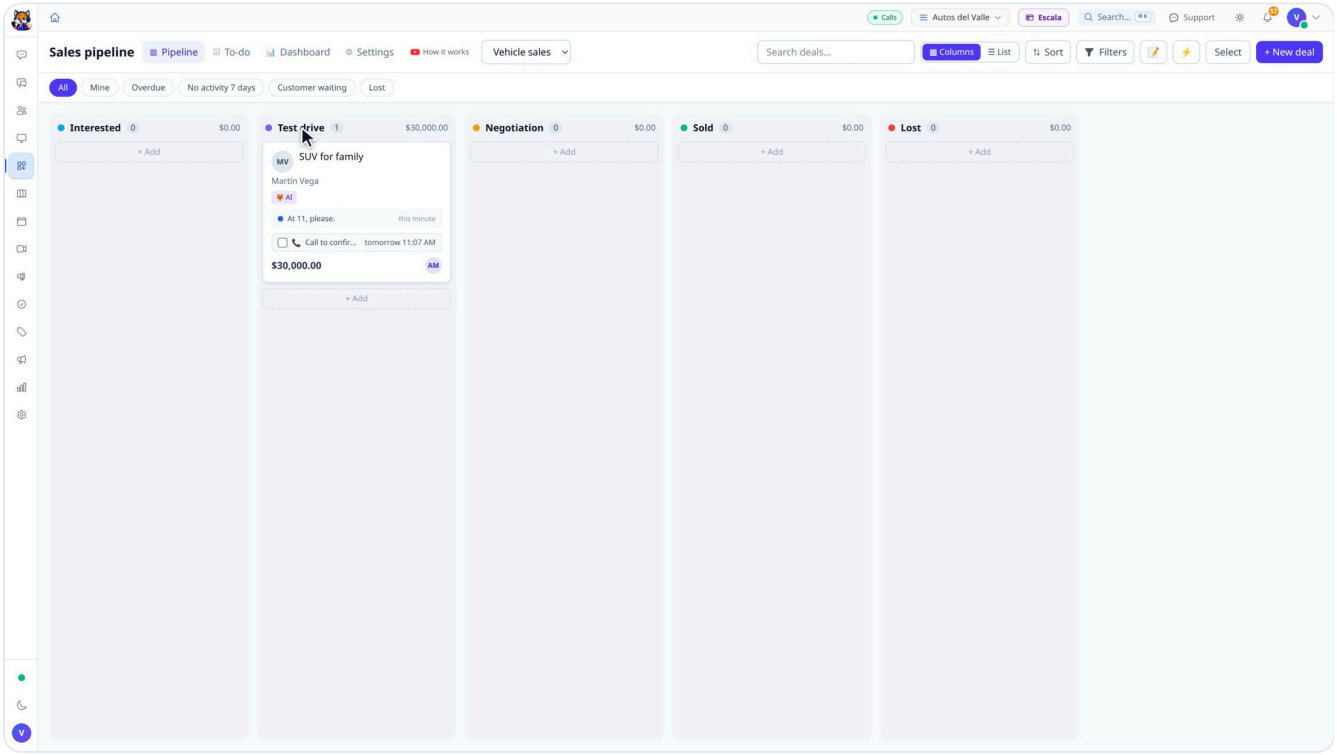
VIDEO STEP 6

Ready for the sales agent

In the CRM, Martín's deal is already in Test drive, with the owner assigned by the workflow and the follow-up call.

And in the Calendar you see the test drive, with the car, the day and the time.



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Tips

- The payment the AI gives is an estimate: the lender sets the final rate.
- Turn on «Accept trade-ins» if you take cars as part of the payment; the AI hands those to an agent.
- Turn on «Require a driver's license» if you ask for it before the test drive.
- Also see the Real estate use case: it explains the distribution workflow, the handover to a person and the automatic follow-up in detail.

And that's it! Inventory, an AI that sells and estimates financing, CRM, distribution and test drives, all connected.

The step-by-step recipe, in PDF, is in the video description. And if you are not using Omnifox yet, try it free for seven days at omnifox.io. See you!