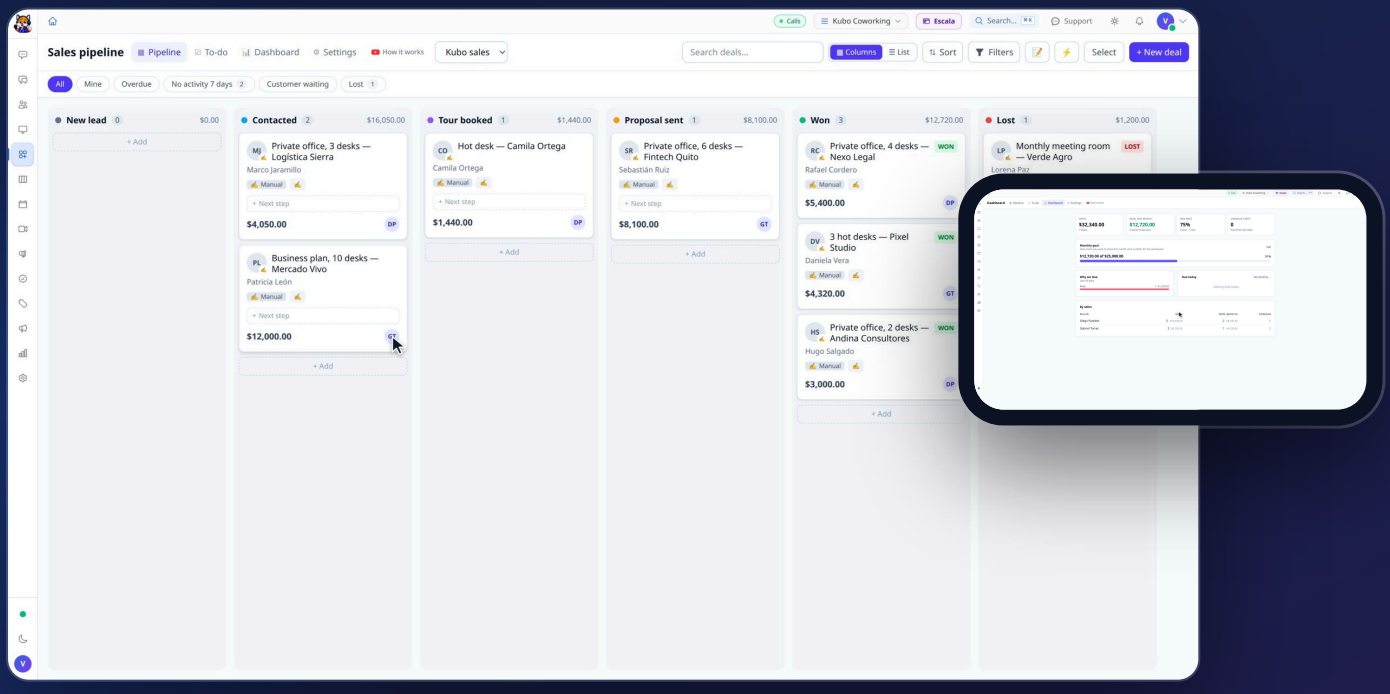
Omnifox

USE CASE · STEP-BY-STEP RECIPE

Sales team with a pipeline

Leads land in the CRM on their own, get shared among the sellers, no follow-up is forgotten and the manager sees how the month is going.



OMNIFOX

Sales team with a pipeline

Hi! When a team sells, the hard part isn't getting leads: it's making sure none of them gets lost. In this video we build a sales team with a pipeline, from start to finish: leads land in the CRM on their own, get shared among the sellers, no follow-up is forgotten and the manager sees how the month is going.

The example is Kubo Coworking, a fictional coworking space in Quito. Valeria is the manager, and Diego and Gabriel are the sellers. Everything you are about to see really works.

The recipe connects six pieces: the sales pipeline, the lead capture form, the contact and the deal, automatic assignment, automatic follow-up and the monthly goal with its dashboard.

THE RECIPE, STEP BY STEP

1. Pipeline — CRM → Settings → Pipeline stages (e.g. New lead, Contacted, Tour booked, Proposal sent, Won, Lost) and Loss reasons.
2. Lead capture form — Lead forms → «New form» → name, fields (Name, Email, Phone, Company) mapped to the contact record → tick «Create a deal in the pipeline» and choose the pipeline → Save. Copy the public link or the code for your website.
3. Contact and deal — every submission creates (or updates) the contact and a deal in the first stage of the pipeline.
4. Automatic assignment — CRM → Pipeline → lightning button → «New automation»: When «A deal is created» → Then «Assign owner» → Save. Open it in the advanced editor → «Assign owner» step → «Round robin within a team» → Sales team → Save.
5. Automatic follow-up — lightning → «New automation»: When «No activity for N days» (7) → «Create an activity» (e.g. «Call {{$contact.first_name}}») + «Add a tag» (Cold) → Save. Omnifox checks the pipeline every day.
6. The seller's day — CRM → To-dos: their tasks; when done, mark them and move the deal to the next stage.
7. Goal and dashboard — CRM → Dashboard → «Set goal» (monthly amount) → Save. Check «By seller» and «Why we lose».

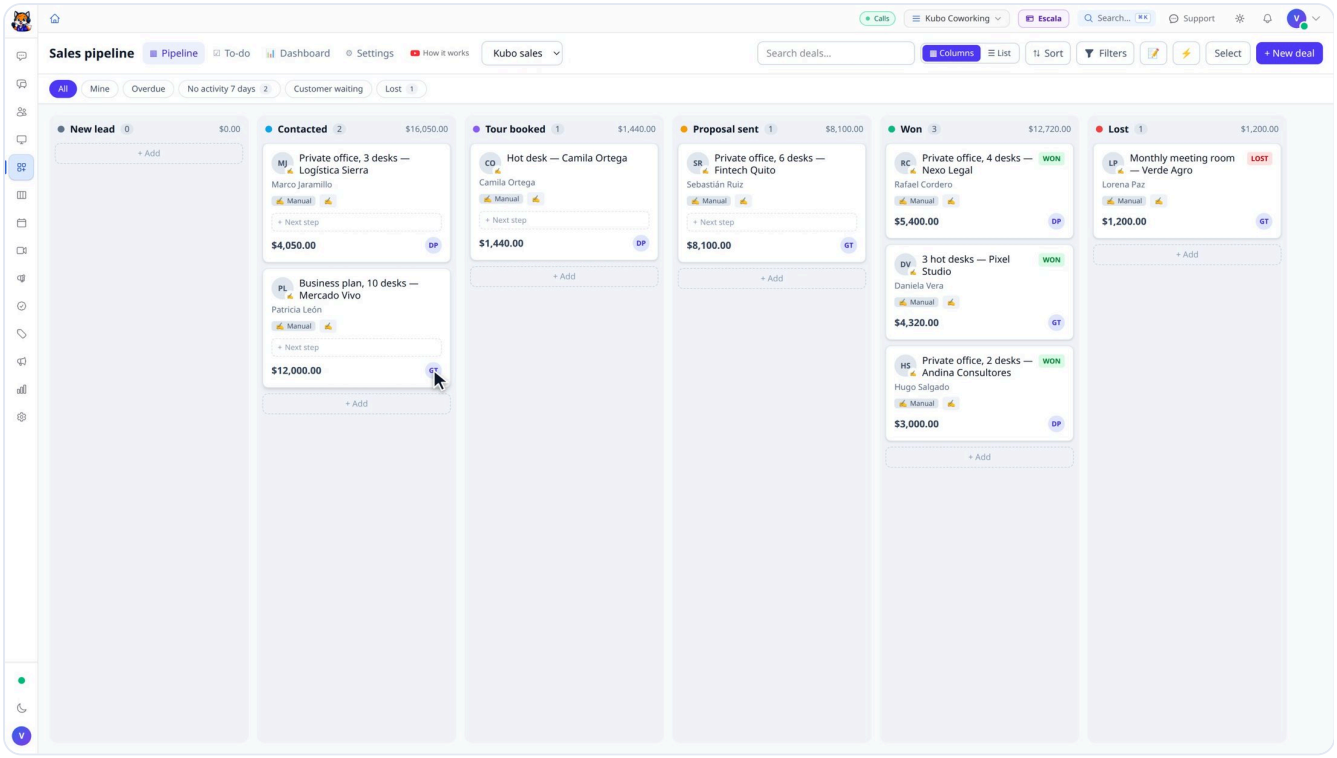
WATCH THE VIDEO

https://youtu.be/gozRrcCacZ0

01 STEP 1 — The sales pipeline

In CRM, Settings, you find the stages of Kubo's pipeline: New lead, Contacted, Tour booked and Proposal sent, plus the closing ones, Won and Lost. Below, the loss reasons, to learn why a sale falls through.

And in the Pipeline, every deal is a card, with its amount and its seller's initials.



02

STEP 2

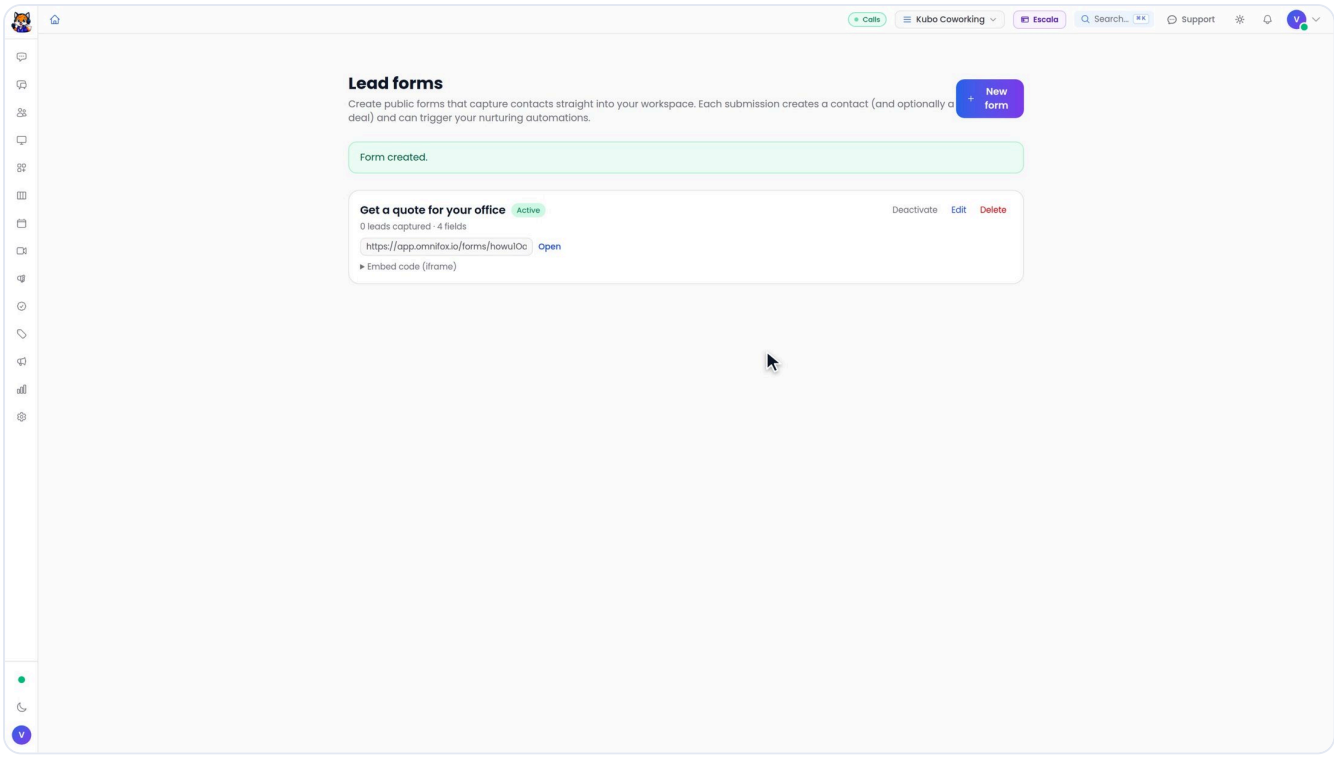
The lead capture form

Leads come from the website. In Lead forms I create a new one: Get a quote for your office.

I add the fields and map each one to the contact record: name, email, phone and company.

And the key part: I tick Create a deal in the pipeline, in the New lead stage. I save, and Omnifox gives me the public link and the code to paste on the website.

Each submission creates the contact, or updates it if it already exists, and it can also trigger your workflows. The form has spam protection: if a bot sends it too fast, it is discarded.



03

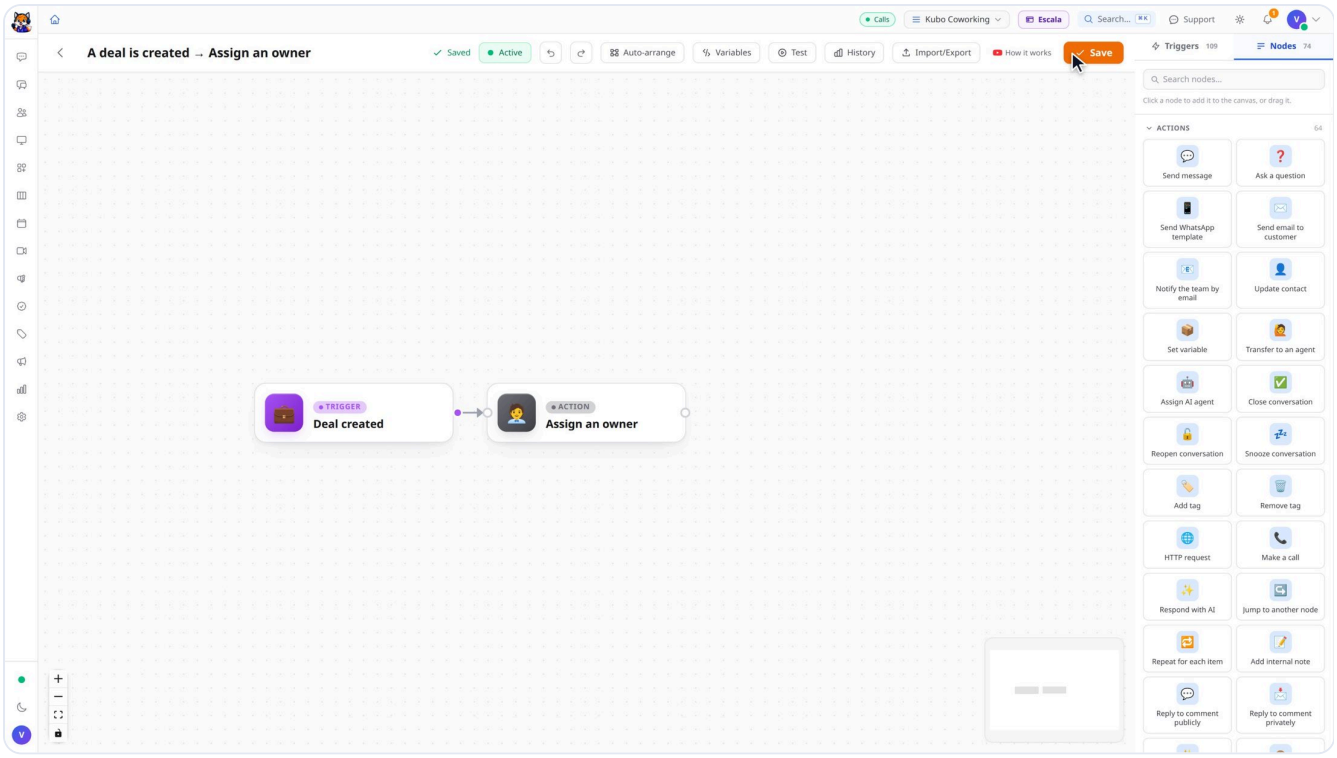
STEP 3

Automatic round-robin assignment

Now, every lead should get an owner on its own. In the Pipeline, the lightning button opens the pipeline automations. New automation: when a deal is created, assign owner.

I save it and open it in the advanced editor. In the Assign owner step I choose round robin within a team, the Sales team, and save. One deal for Diego, the next one for Gabriel.

You can also assign to whoever has the fewest open deals, or always to the same person. And assignment skips anyone who is away.



04

STEP 4

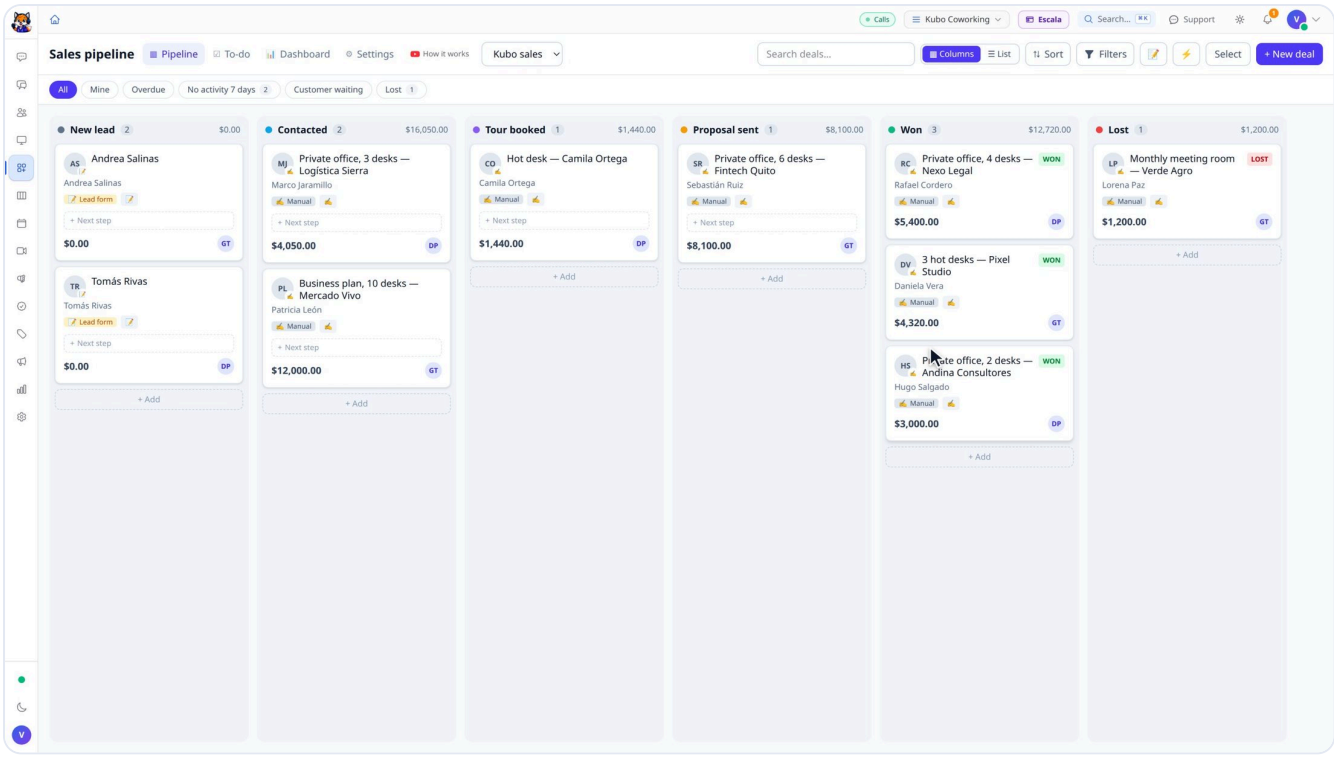
A lead comes in

Let's try it. Andrea, from a startup, opens the form, types her details and sends it.

A moment later another lead arrives: Tomás, from a design agency.

In the Pipeline both deals show up in New lead, each with its contact created and with a different seller. Nobody had to assign anything.

If I open Andrea's deal, there is her contact with the phone she typed, the Form source and her owner. The seller can call her right away.



05

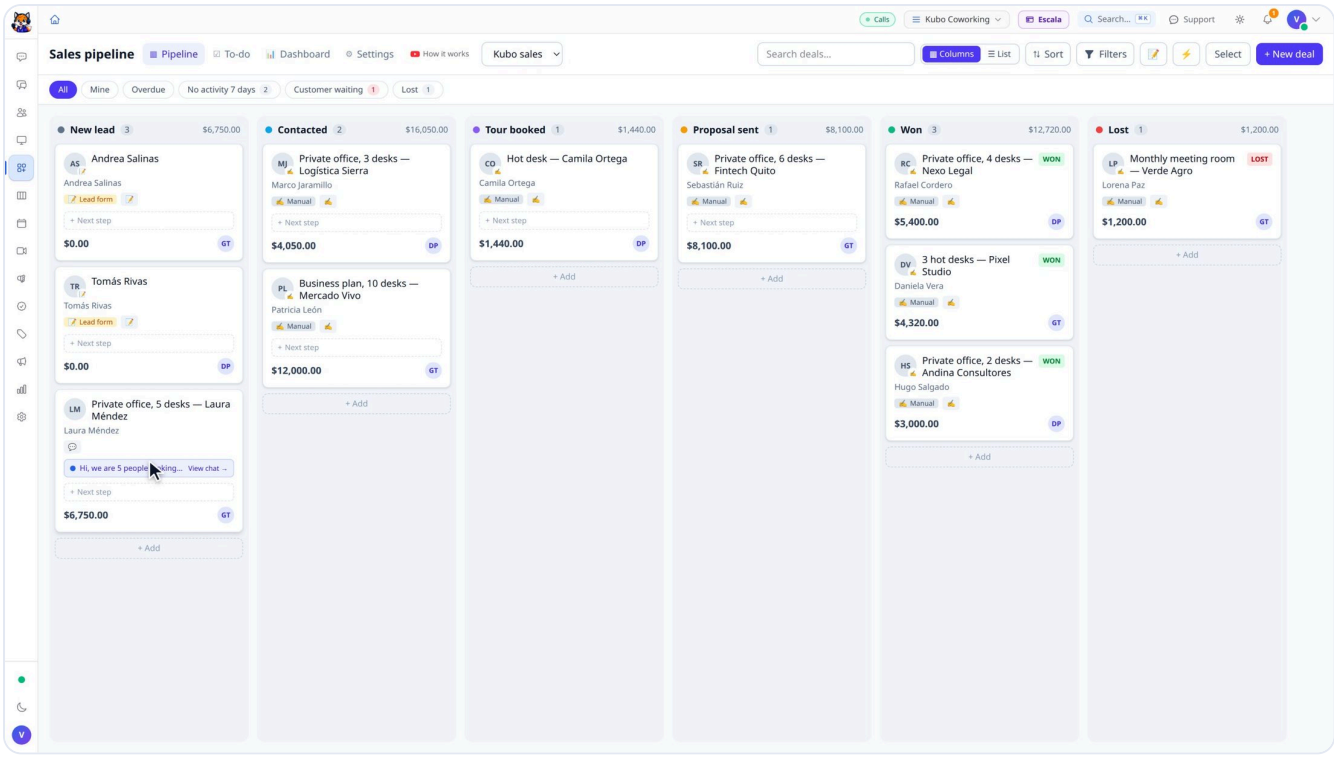
STEP 5

From the website chat too

If the lead prefers to write, they use the website chat. Laura asks about a private office for five people.

Valeria opens the conversation in the Inbox and clicks Deal: the pipeline, the stage, the title and the amount. Create deal.

The deal is linked to the conversation, with its contact, and the assignment rule gives it a seller, just like the form leads.



06

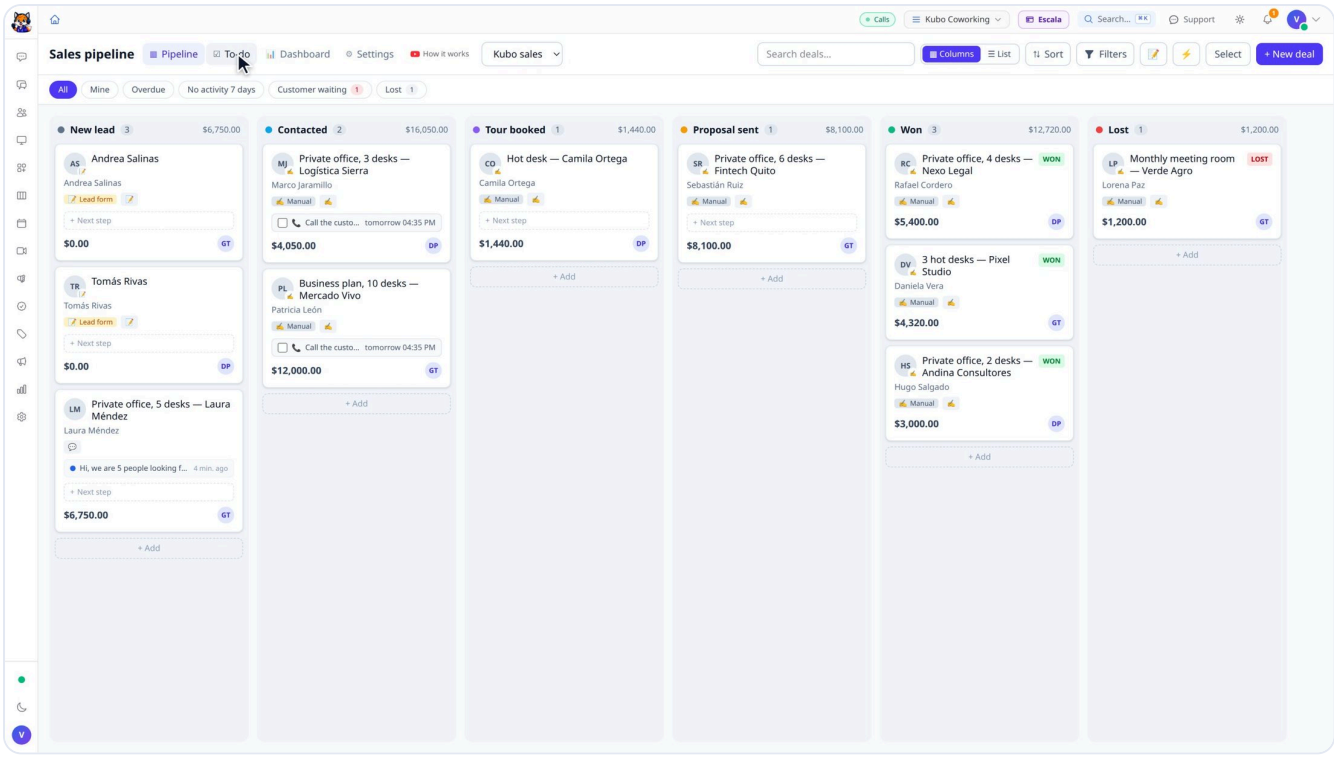
STEP 6

Follow-up when it goes cold

What if a deal stalls? Another automation: when it has had no activity for seven days, create an activity for its owner, call the customer, and add the Cold tag.

Omnifox checks the pipeline every day. Two deals have been idle for more than a week, and the rule creates a task for Diego and one for Gabriel.

The task shows up in the deal record, on its Pipeline card and in To-dos, with its date. If it expires undone, the Dashboard counts it as an overdue step.



07

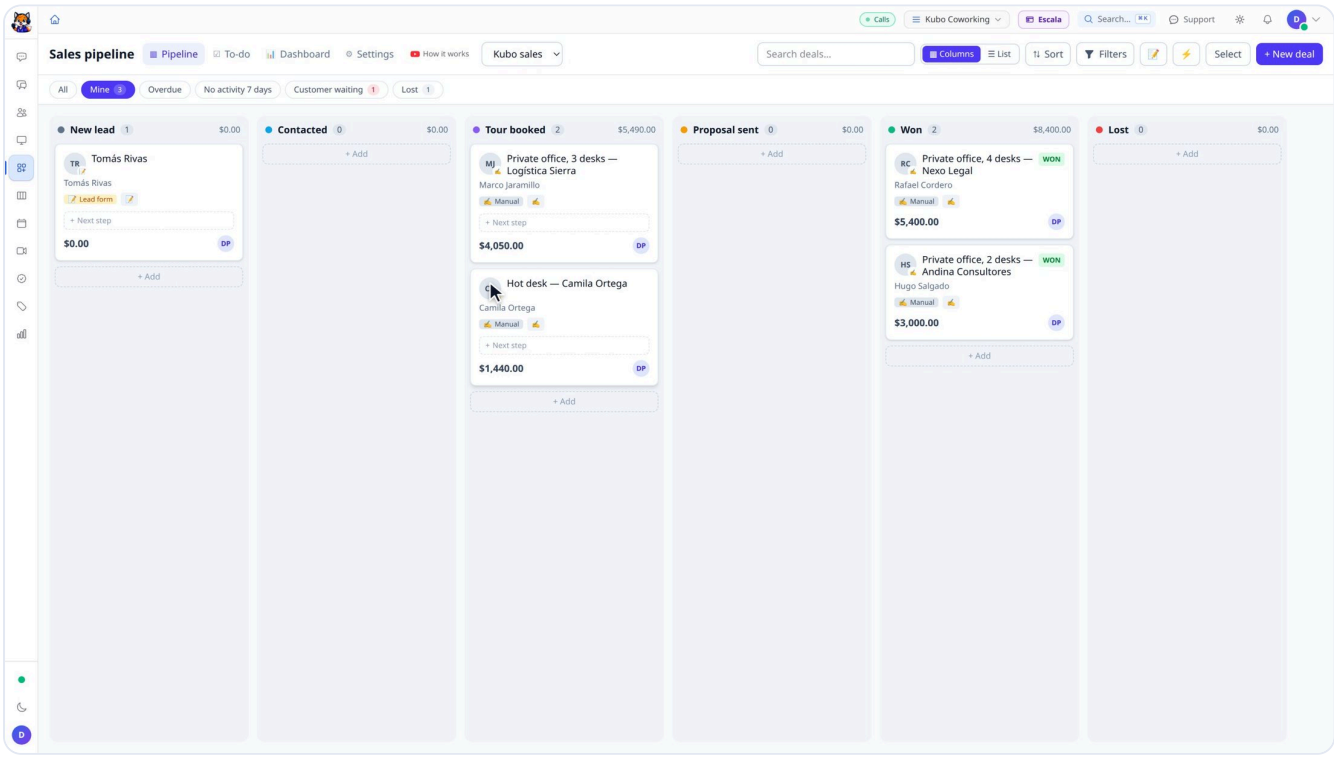
STEP 7

The seller's day

This is what Diego sees in To-dos: the call to Marco, from Logística Sierra, ready to do.

He calls, marks it as done and moves the deal to Tour booked. Everything stays in the deal history.

And with the Mine filter, Diego sees only his own deals: the first thing he checks every morning.



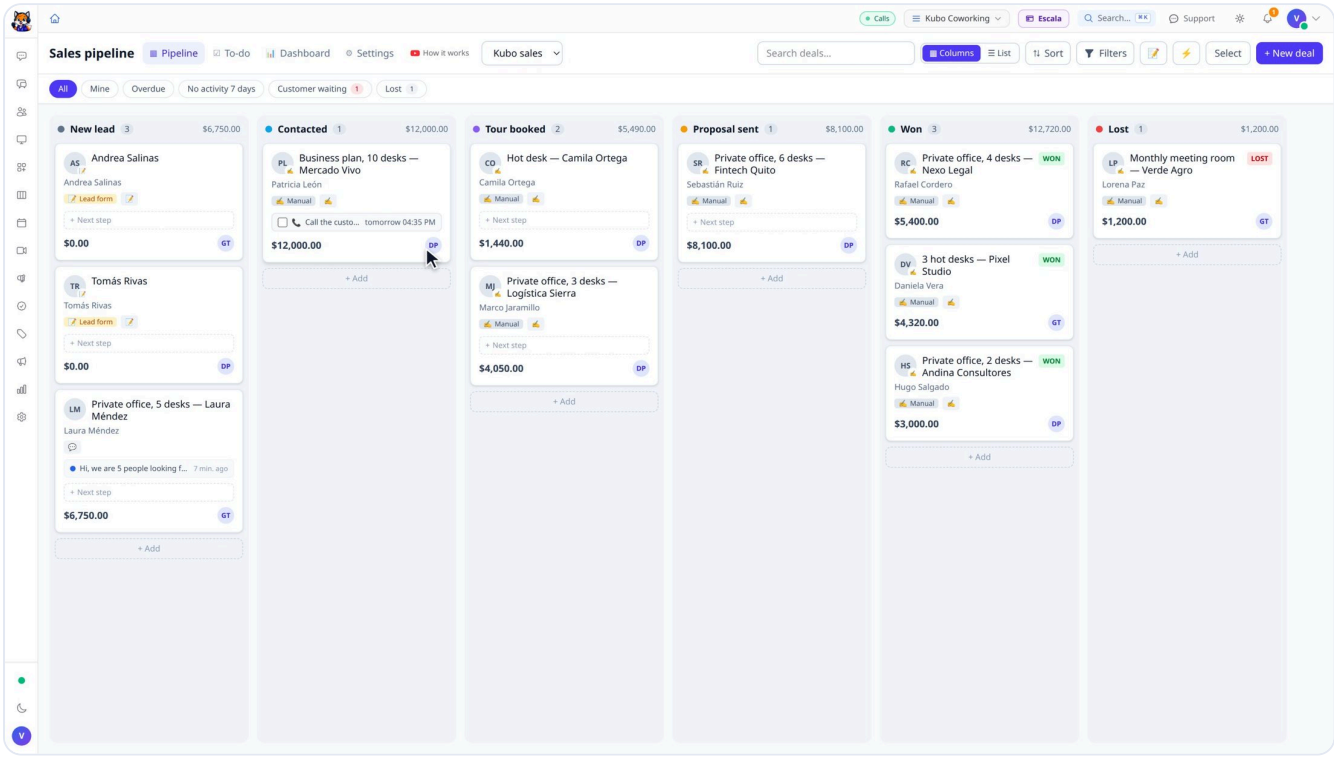
08

STEP 8

Reassign in bulk

And if a seller goes on vacation, Valeria doesn't move card by card: she clicks Select, ticks Gabriel's open deals and, in the bar at the bottom, chooses Reassign to Diego.

They all move to the new owner at once, every change stays in its history, and automatic assignment keeps working for new leads.



09

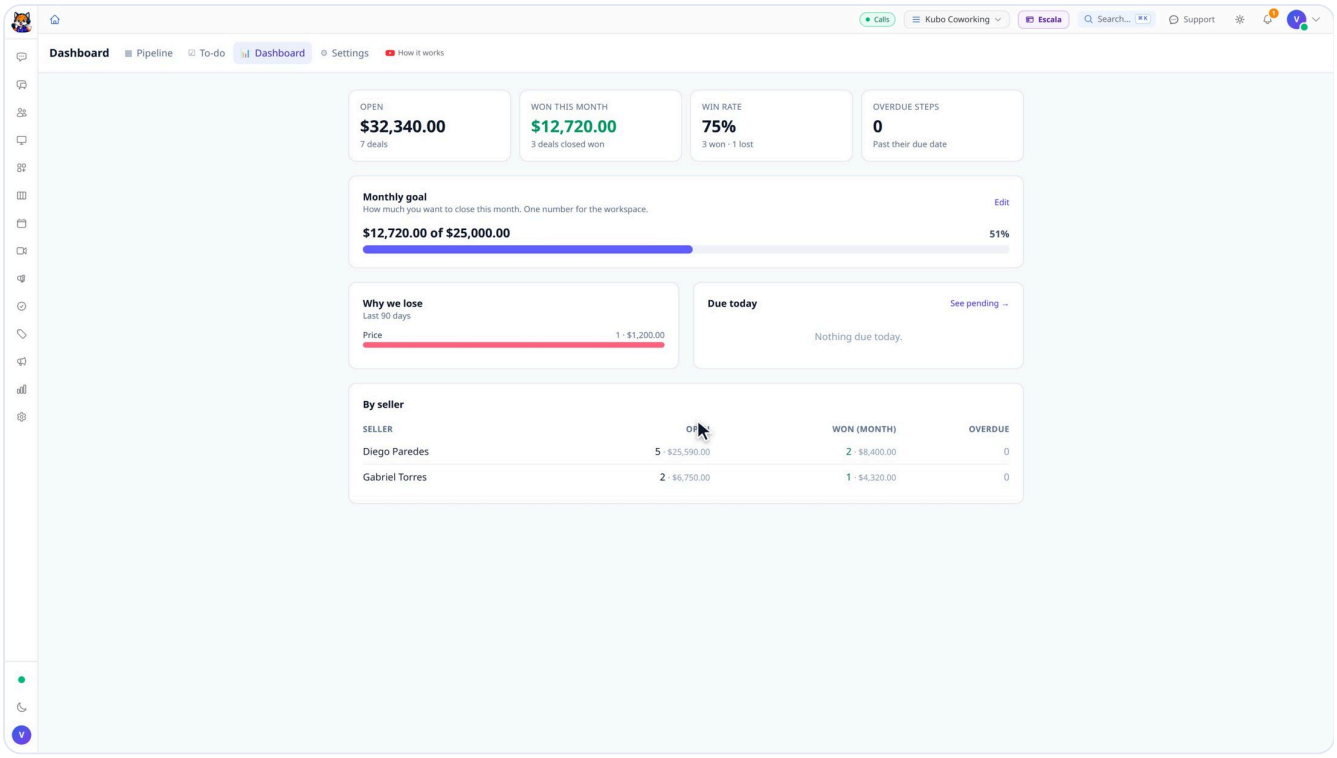
STEP 9

Monthly goal and dashboard

Valeria follows it in the Dashboard. At the top: what is open in the pipeline, what was won this month, the win rate and the overdue steps. She sets the monthly goal: twenty-five thousand dollars. The bar shows how much they have won against the goal.

Further down, By seller shows each person's open deals, what they won this month and their overdue steps. And Why we lose groups lost sales by reason.

Omnifox doesn't set quotas per seller: if you want one, split the goal among your team and compare it here with what each one won.



OMNIFOX

Tips

- Few stages with clear names: each stage should be a step the team recognizes.
- Ask in the form only for what you need to call or write to the lead.
- To assign among some sellers only, create a team and use round robin within that team.
- The Pipeline filter «No activity 7 days» shows at a glance what is going cold.
- Omnifox does not set quotas per seller: split the goal and compare it with «By seller».
- Always record a reason when marking a deal as lost: it feeds «Why we lose».

More tutorials and manuals: omnifox.io/help