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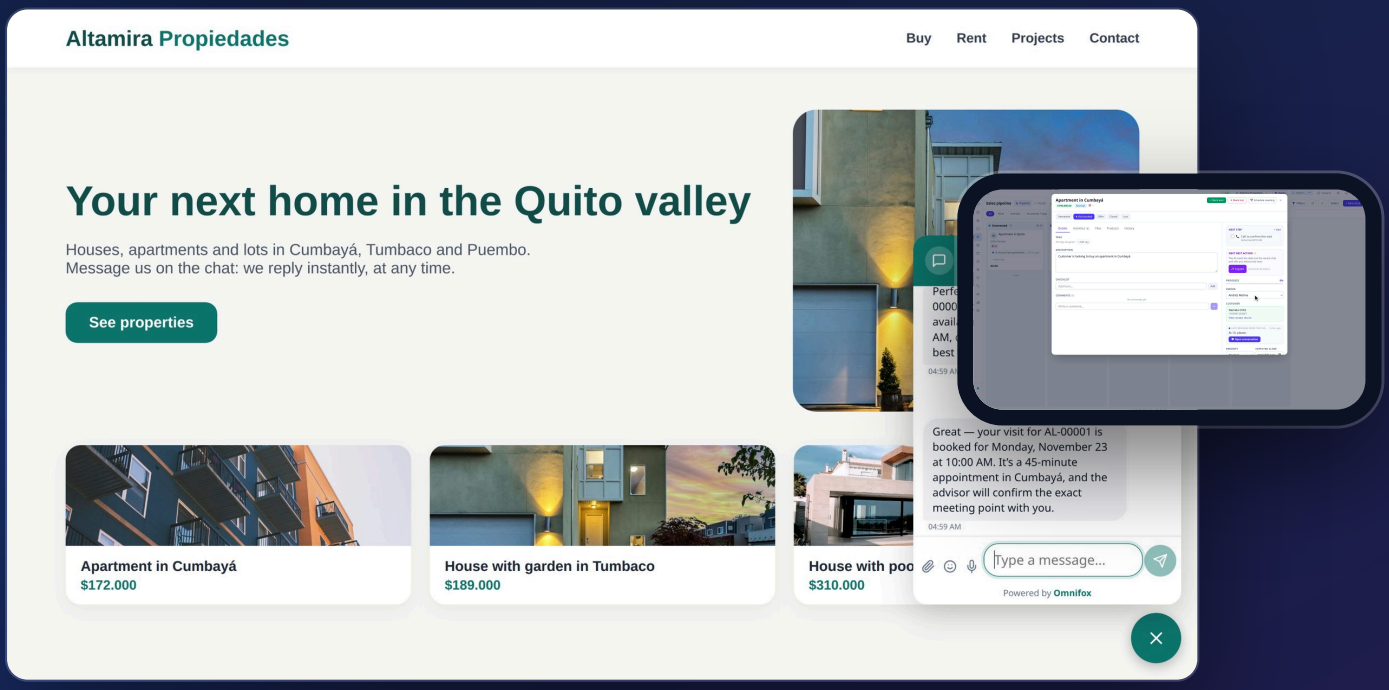
USE CASE · STEP-BY-STEP RECIPE

Real estate: from chat to property visit, without losing a lead

Property catalog, an AI agent that qualifies and books visits, CRM, lead distribution to your agents, a visit calendar and automatic follow-up, all connected.



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Real estate: from chat to property visit, without losing a lead

Hi! In this use case you will see how to set up, in Omnifox, a real estate agency that answers on its own: the lead writes at any time, the artificial intelligence shows them real properties, qualifies them, books the visit, and the agent gets the lead ready to close.

We will connect six pieces: the property catalog, the AI agent, the CRM, a workflow that distributes leads among the agents, the visit calendar and the automatic follow-up.

The example is Altamira Propiedades, a fictional real estate agency in Quito. Everything you see really happens: the chats come in through the chat on its website.

WATCH THE VIDEO

https://youtu.be/gAm4OgYRBgw

WHAT YOU NEED

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

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The recipe

1. The team and the contact record

1. Settings → Workspace → Teams: create the «Advisors» team with your agents and the Round-robin strategy.
2. Settings → Workspace → Custom fields: create the Contact text fields operacion, tipo_propiedad, zona_interes, dormitorios and presupuesto (the AI uses the internal name).

2. The property catalog

1. Catalog → Modules: turn on Real estate.
2. Properties → New property (or Import from Excel): title, operation, type, price, bedrooms, neighborhood and photos tagged by room.
3. Keep published (green switch) only the listings the AI may offer.

3. Visits and CRM

1. Calendar: create the «Property visits» calendar with your agents' opening hours.
2. CRM → Settings: «Property sales» pipeline with the stages Interested, Visit booked, Offer, Closed (won) and Lost.
3. Properties → Settings → Visits: visit length, Visits calendar and «Ask about budget before booking».
4. Properties → Settings → CRM: create a deal for every lead, in the pipeline and stage you choose.

4. The AI agent

1. AI agents → New agent. In Instructions: how to qualify (buy or rent, type, area, bedrooms, budget), save each answer in its field, offer at most three properties, book visits and hand over to Advisors if they want to negotiate or ask for a person.
2. Tools: Assign to agent or team (Round-robin), Update contact fields, Search properties, Send property photos and Schedule a property visit.
3. Tools → Create CRM opportunity: rule «shows interest» → Interested and automatic rule «an appointment was booked» → Visit booked.
4. Behavior → Customer inactivity: Enable automatic follow-up (touch 1 generated by AI) and Transfer to a human if still no reply, to the Advisors team.
5. Connections: connect the agent to the website chat (or the channel you use) and save.

5. Distribution, with a workflow

1. Workflows → New workflow, name «Lead distribution».
2. Trigger: Deal created.
3. Action: Assign deal owner (CRM) → Round robin within a team → Advisors.
4. Action: Create follow-up task (CRM) → Call, «Call to confirm the visit», assignee: the deal owner.
5. Connect trigger → assign → task, Save and set it Active.

6. Test it

1. Write on your website chat as if you were a customer: the AI qualifies, offers, sends photos and books.
2. Check the contact record, the deal in the CRM (with owner and task) and the visit in the Calendar.
3. In CRM → Pending each agent sees their calls; the CRM Board shows the team's results.

01

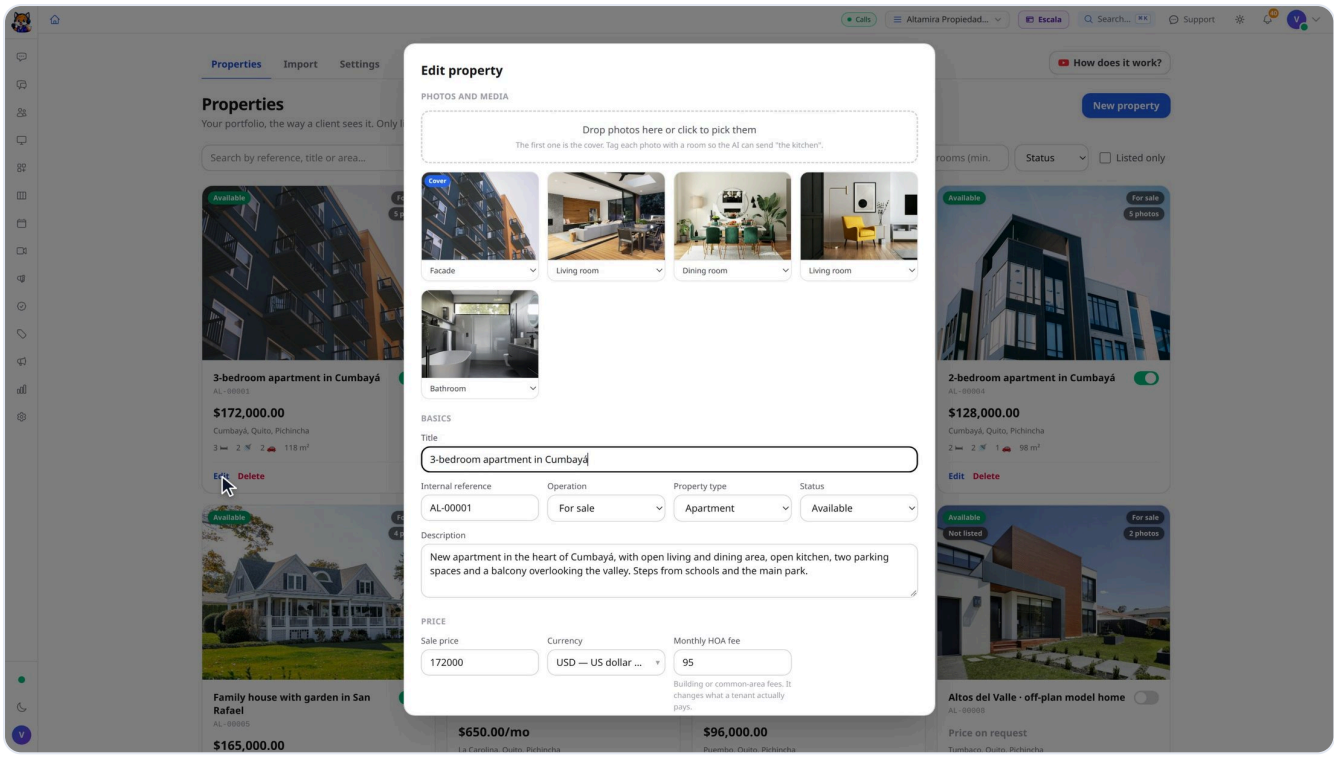
VIDEO STEP 1

The property catalog

It all starts with the catalog. In Properties you have Altamira's listings: houses, apartments and lots, each one with its reference, price, area and photos.

I open the apartment in Cumbayá: operation, price, bedrooms, neighborhood, the description and the photos of each room. This is what the AI will work with.

The green switch means the property is published. The AI only offers what is published and available: this off-plan house, which is not published, will never be offered.



02

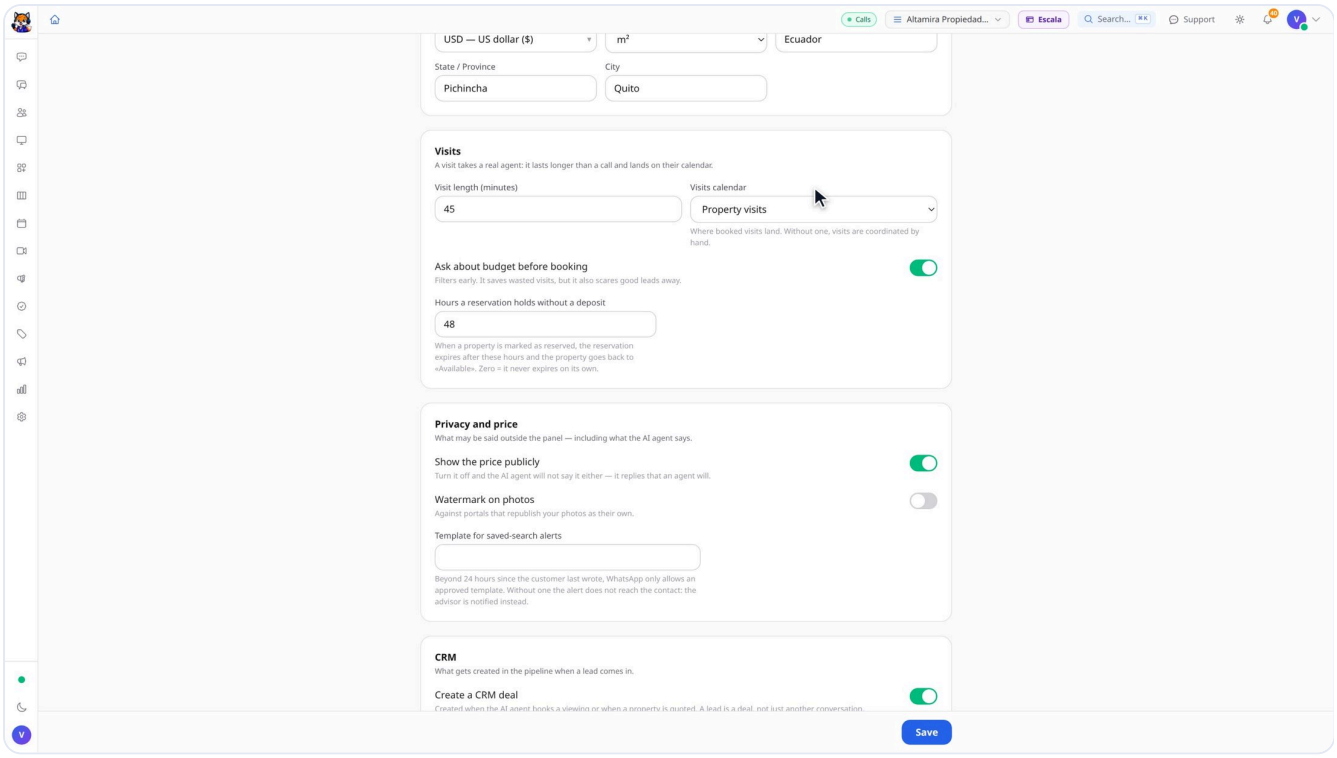
VIDEO STEP 2

Visits and CRM, in the settings

In Settings you decide how the module works. In Visits: each visit lasts forty-five minutes and goes into the Property visits calendar, which has the agents' opening hours.

I turned on Ask about budget before booking: that way nobody takes up an agent's time without first saying how much they can pay.

And further down, in the CRM: every lead who books a visit creates a deal in the Property sales pipeline.



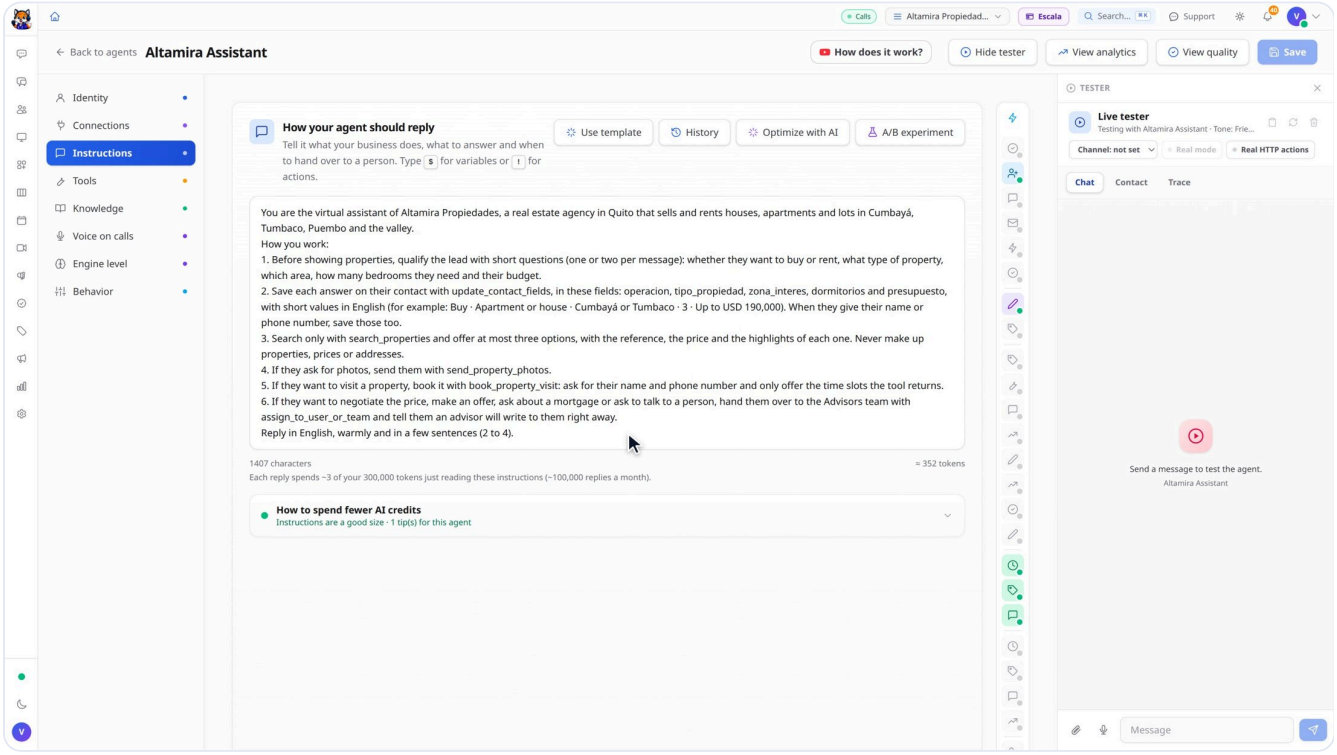
03

VIDEO STEP 3

The AI agent: how it answers

Now the artificial intelligence agent, called Altamira Assistant. In Instructions I explain, in plain words, how it should work.

First it qualifies: buy or rent, property type, area, bedrooms and budget, and it saves each answer on the contact's record. Then it searches the catalog, sends photos, books the visit, and if the customer wants to negotiate or asks for a person, it hands them over to the team of agents.



04

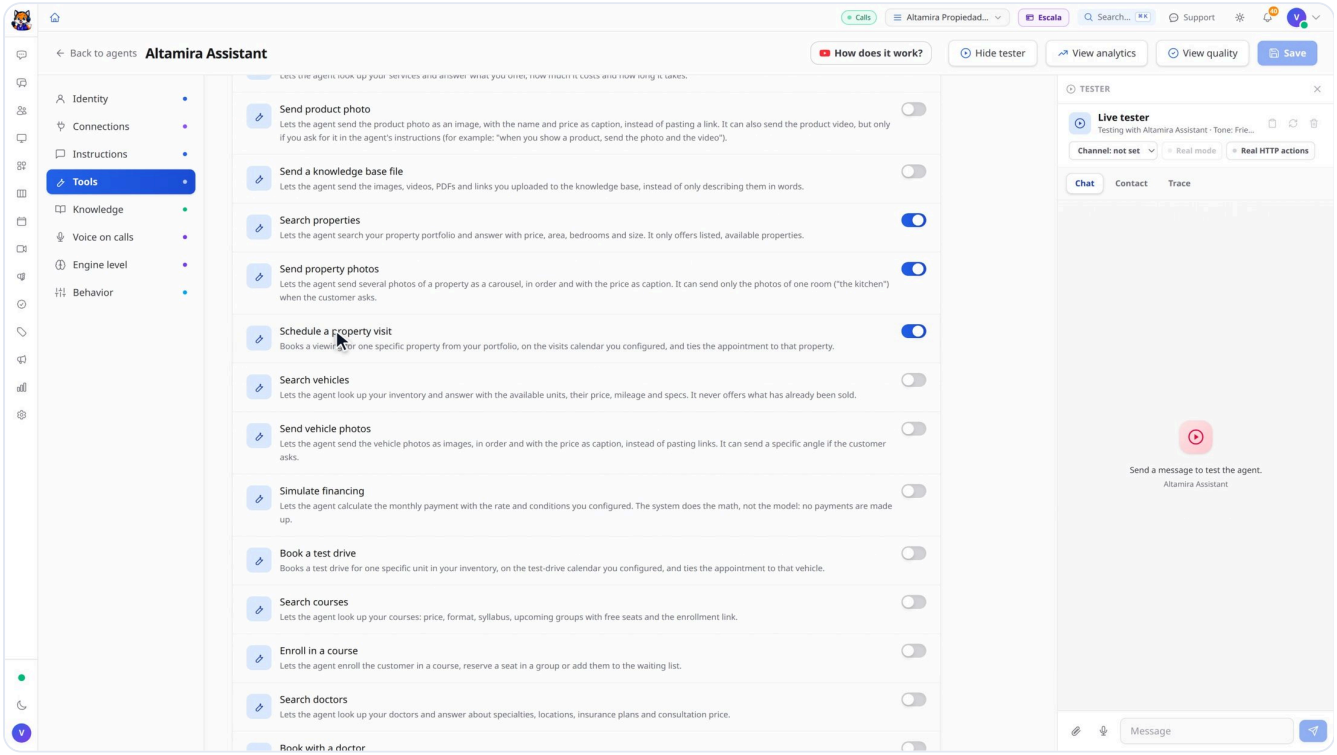
VIDEO STEP 4

Its tools

In Tools you have the actions it can use. Assign to agent or team: this is how it hands the conversation to a person, rotating among the agents.

Update contact fields: with this one it saves what it learns on the contact's record.

And the catalog ones: Search properties, Send property photos and Schedule a property visit, which books in the visit calendar and never makes up a time slot.



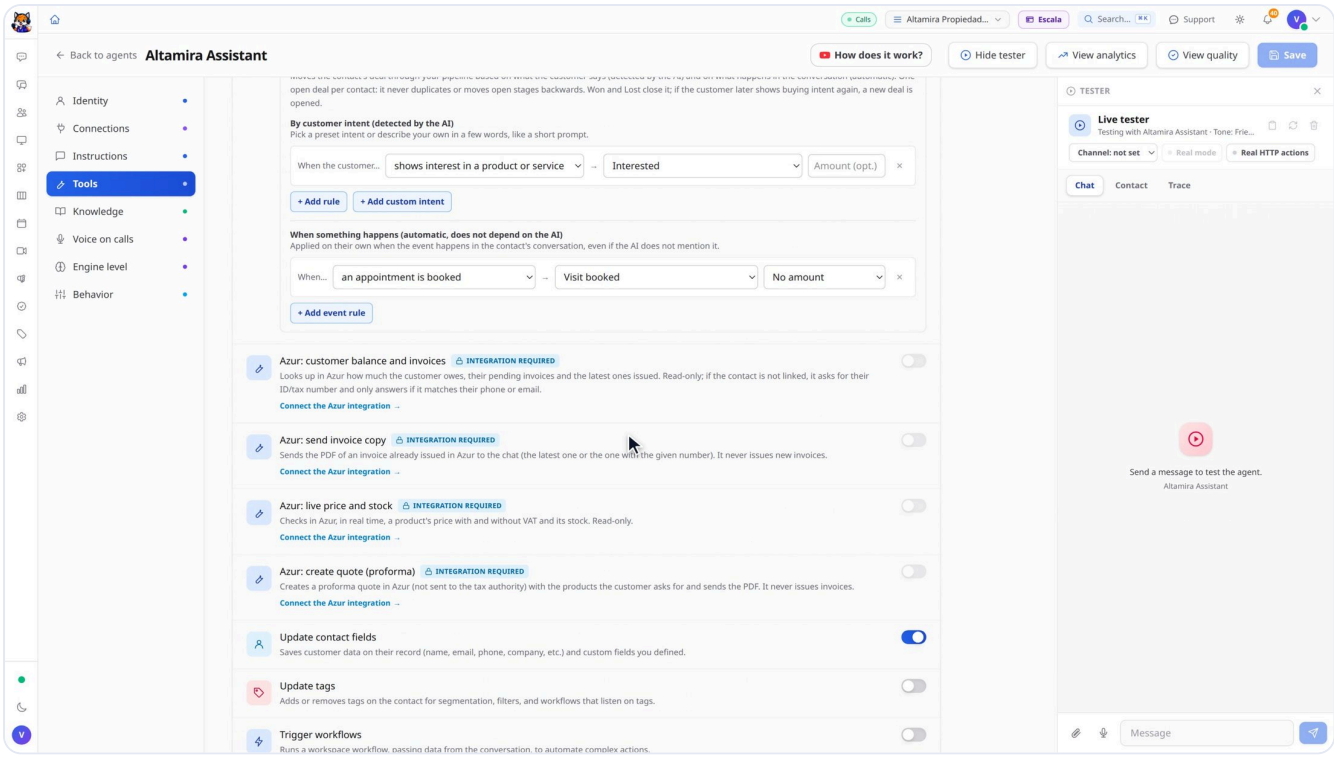
05

VIDEO STEP 5

CRM rules

Create CRM opportunity moves the lead through the pipeline with rules. When the customer shows interest in a property, the deal opens in Interested.

And an automatic rule: when an appointment is booked, the deal moves to Visit booked. Nobody has to drag cards by hand.



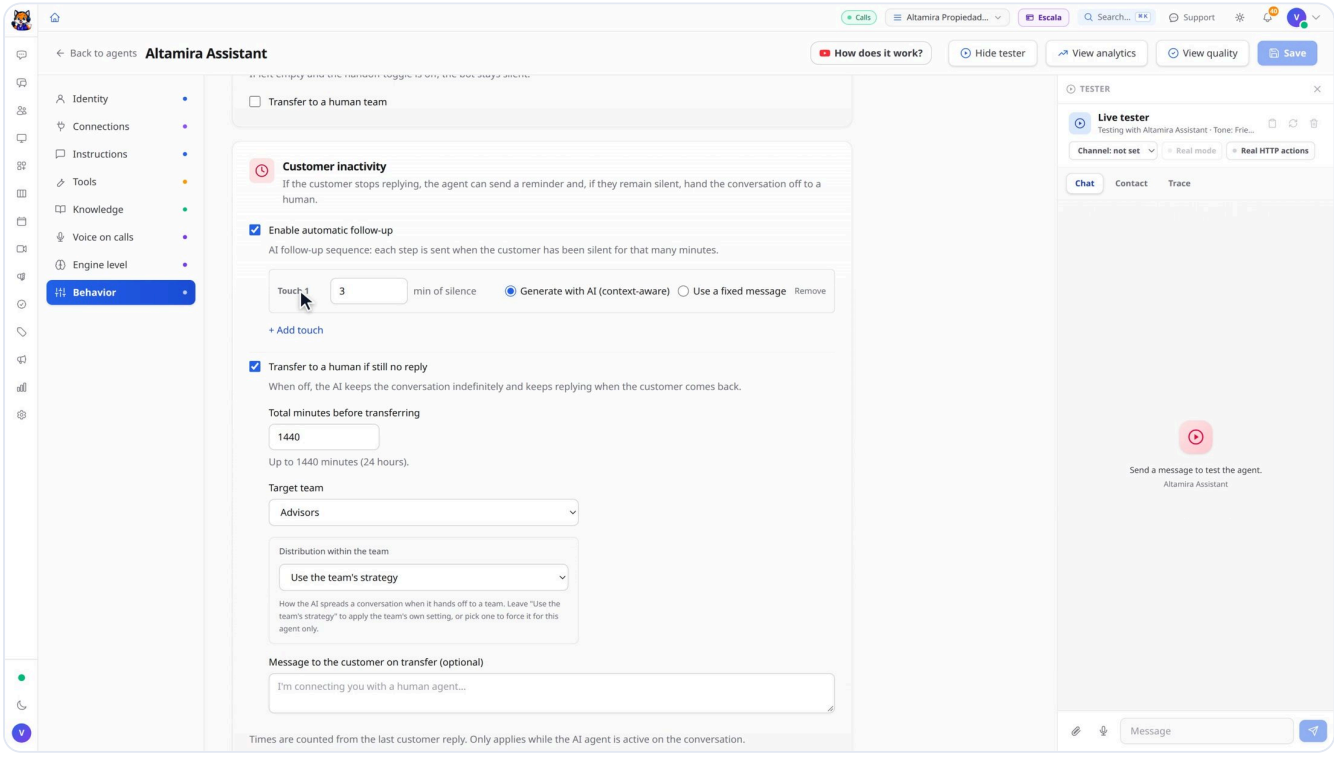
06

VIDEO STEP 6

Follow-up when they stop replying

In Behavior, Customer inactivity. I turned on automatic follow-up: if the lead stops replying for three minutes, the AI writes them a reminder using the context of the conversation.

And if they stay silent for a whole day, the conversation goes to the team of agents by itself. In real life you would set one or two hours for the first touch; here it is three minutes so we can see it in the video.



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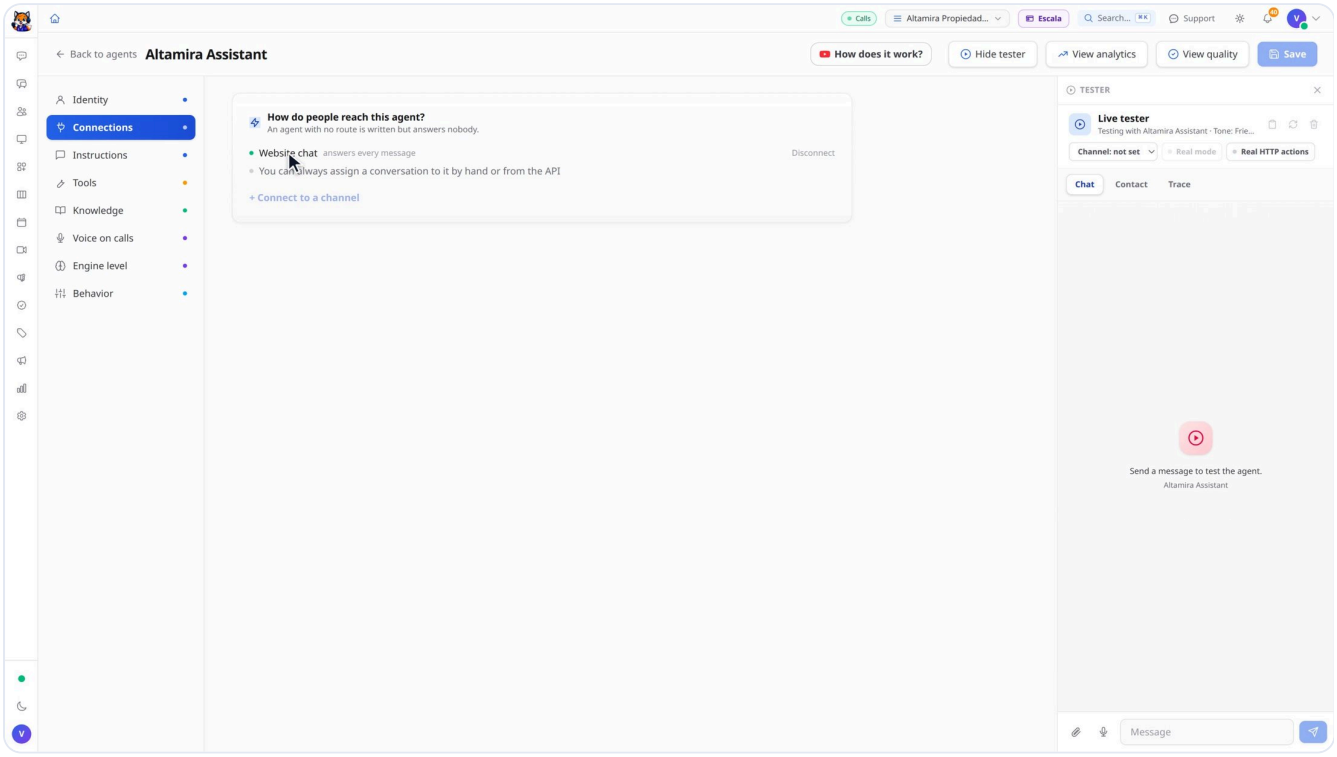
VIDEO STEP 7

Connected to the website chat

Connections shows where it answers: the chat on Altamira's website. From there, every new conversation reaches this agent, day and night.



08

VIDEO STEP 8

Distribution, with a workflow

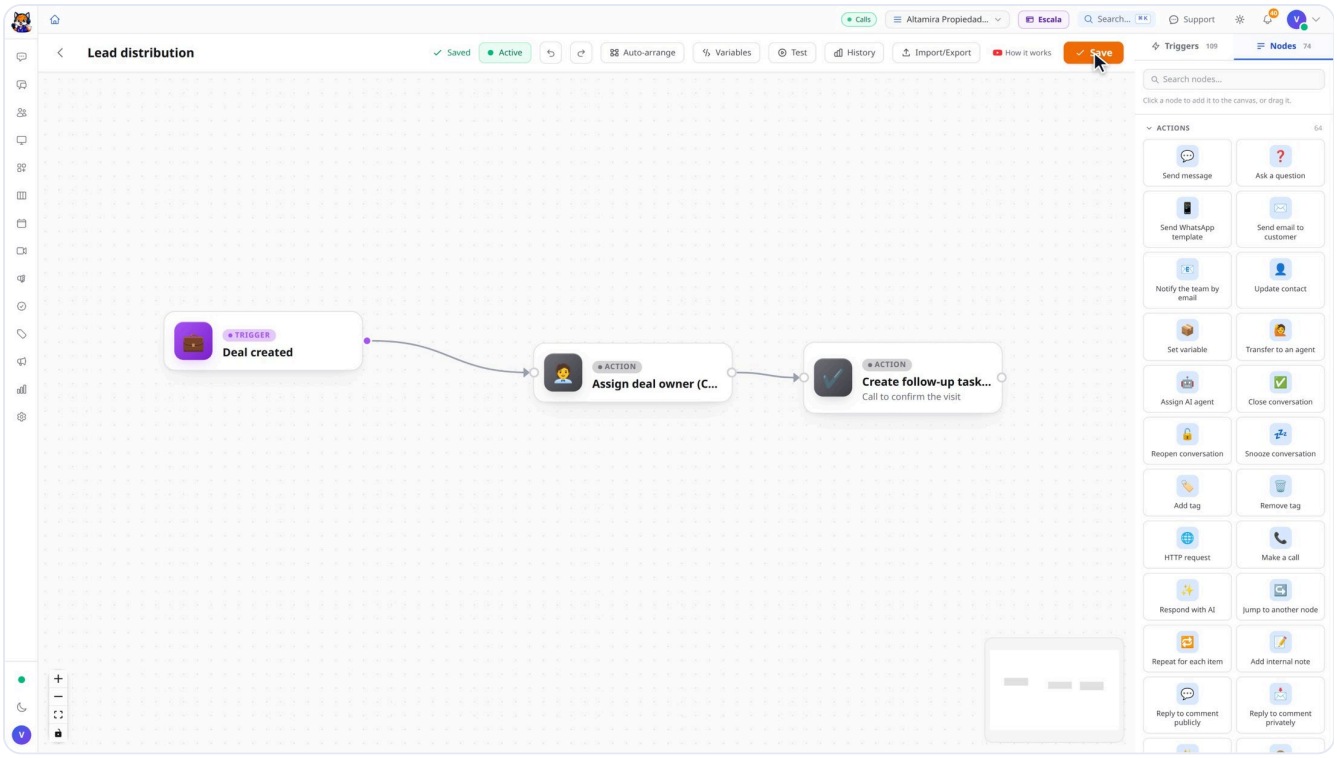
We still need to distribute leads among the agents. A workflow does that. I create a new one and name it: Lead distribution.

The trigger is Deal created: every time a new deal enters the CRM, whether it comes from the AI or from a person.

I add the action Assign deal owner, and choose round robin within the Advisors team.

And another action: Create follow-up task. A call to confirm the visit, assigned to the deal owner.

I connect the pieces, save and turn it on. From now on, every lead has an owner and a next step.



09

VIDEO STEP 9

A lead writes in

Now for the good part. Daniela visits Altamira's website and opens the chat.

She is looking for an apartment to buy in Cumbayá. The AI does not throw a list at her: first it asks what is missing.

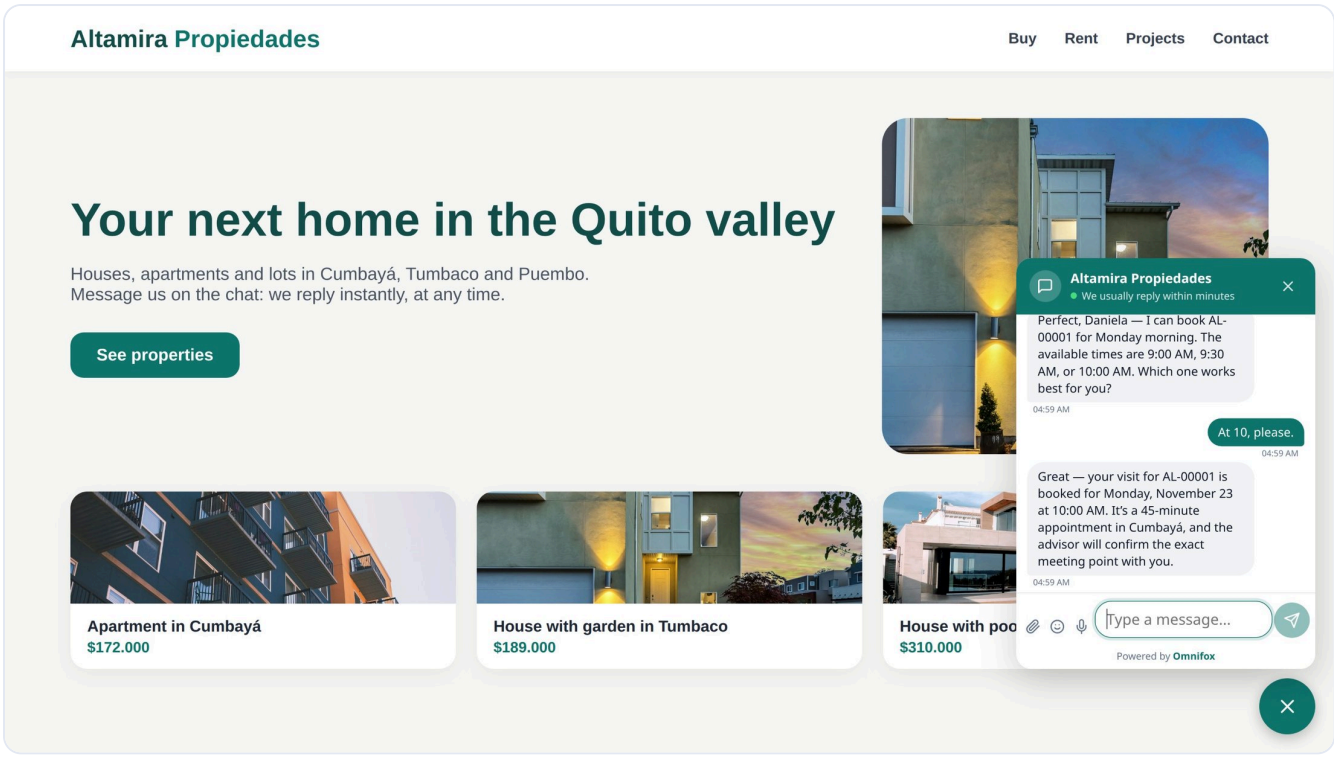
Daniela answers: three bedrooms, up to one hundred ninety thousand dollars. With that, the AI searches the catalog and offers what fits, with the reference and price.

She likes the three-bedroom apartment and asks for photos. The real photos we loaded in the catalog arrive.

She wants to visit it. Since the agency asks to qualify before booking, the AI already has the budget; it only asks for her name and phone number.

The AI checks the visit calendar and offers her the time slots that are really free.

Daniela picks one, and that is it: visit booked. All of this without anyone on the team touching the keyboard.



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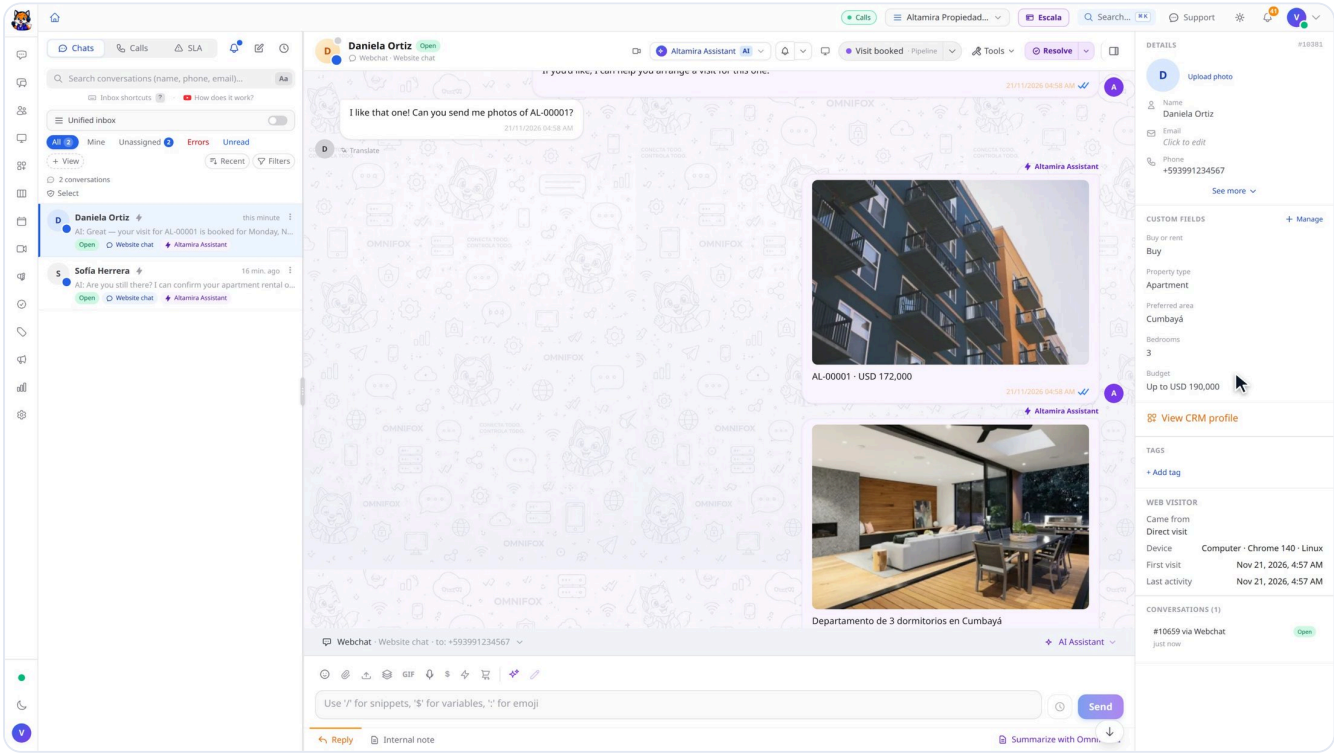
VIDEO STEP 10

Qualified and recorded

Back to the dashboard. In the inbox you find Daniela's conversation, handled by the AI from start to finish.

And on the contact's record, everything she told us: her name, her phone number and the qualification data, buy, type, area, bedrooms and budget, each one in its own field.



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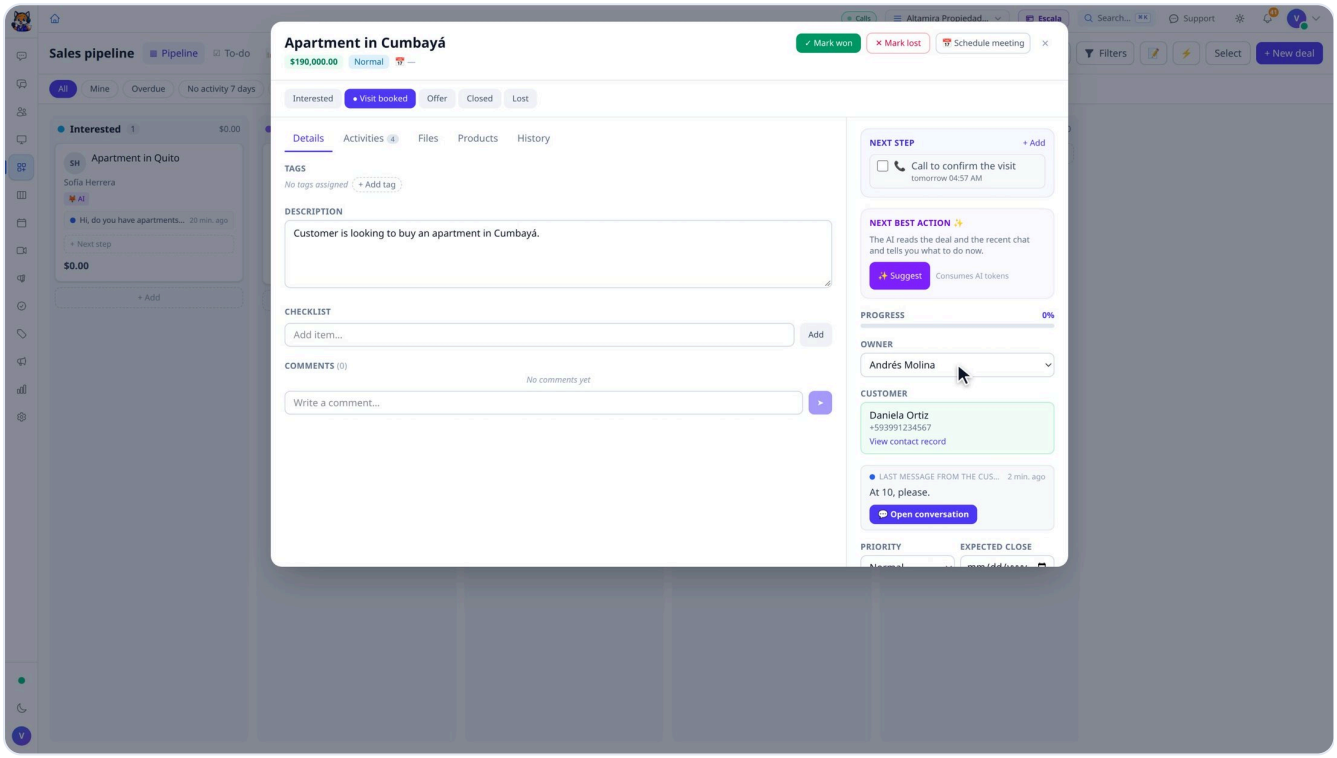
VIDEO STEP 11

The deal in the CRM, with an owner

In the CRM, Daniela's deal is already in Visit booked: the AI opened it when she showed interest and moved it forward on its own when she booked.

I open it: the distribution workflow already assigned an owner, Andrés Molina, and left him the task of calling her to confirm the visit. And in the notes, the AI explains why it opened and moved the deal.



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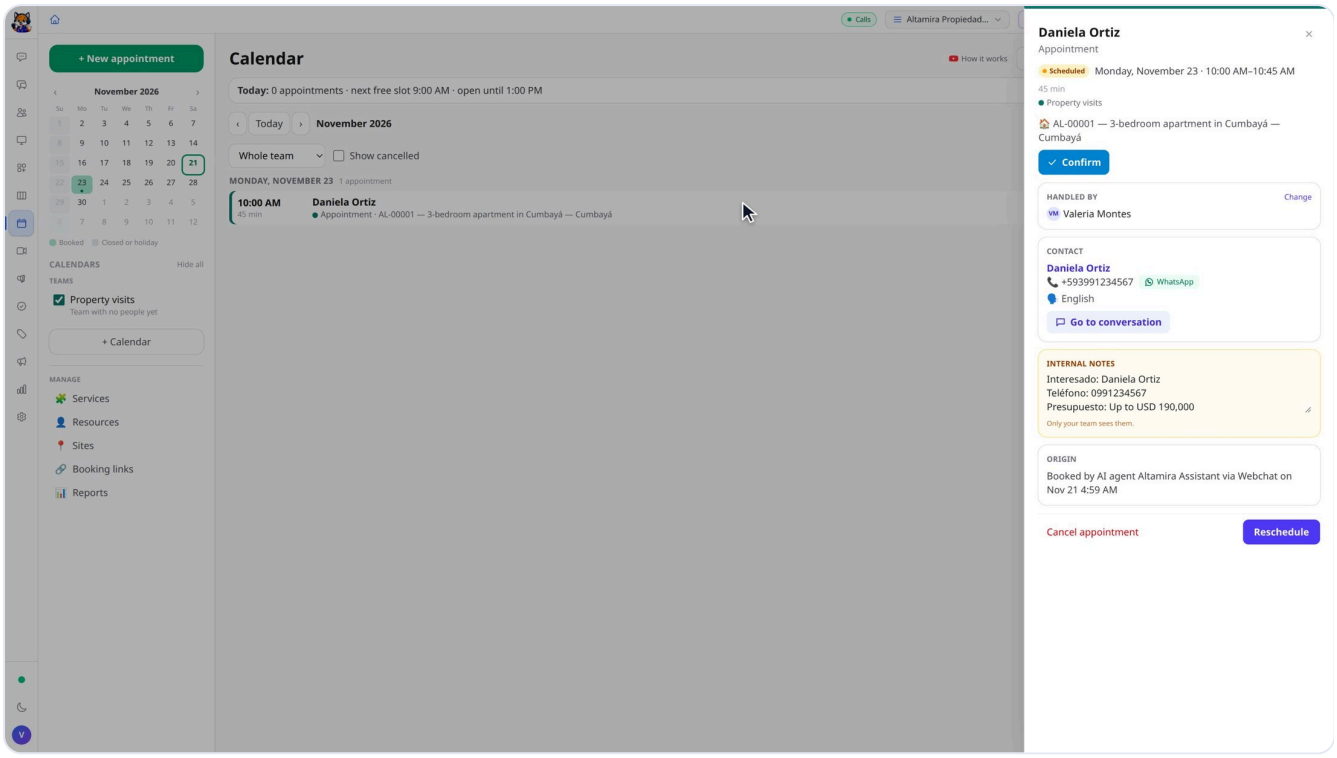
VIDEO STEP 12

The visit in the calendar

And in the Calendar you can see the visit, on the day and at the time Daniela chose.

It says which property she is going to see, and the note has her phone number and her budget. The team sees the exact address, even though we did not give it to the customer in the chat.



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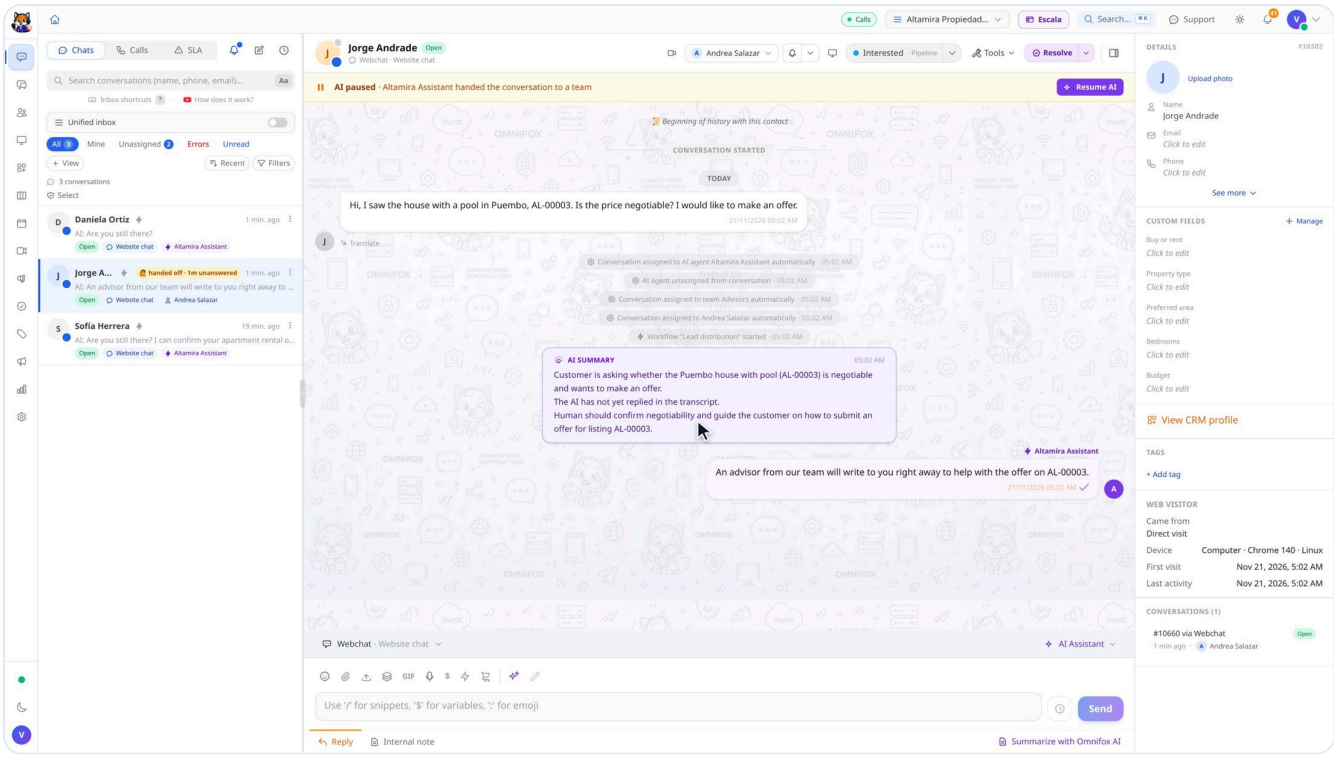
VIDEO STEP 13

When a person is needed

But the AI does not solve everything. Jorge writes about the house with a pool in Puembo: he wants to know if the price is negotiable and make an offer.

A person has to handle that. The AI tells him an agent will write to him right away and hands the conversation to the Advisors team. Rotating, this time it is Andrea Salazar's turn.

From then on the AI steps aside: the conversation is in Andrea's hands, with the whole history in view.



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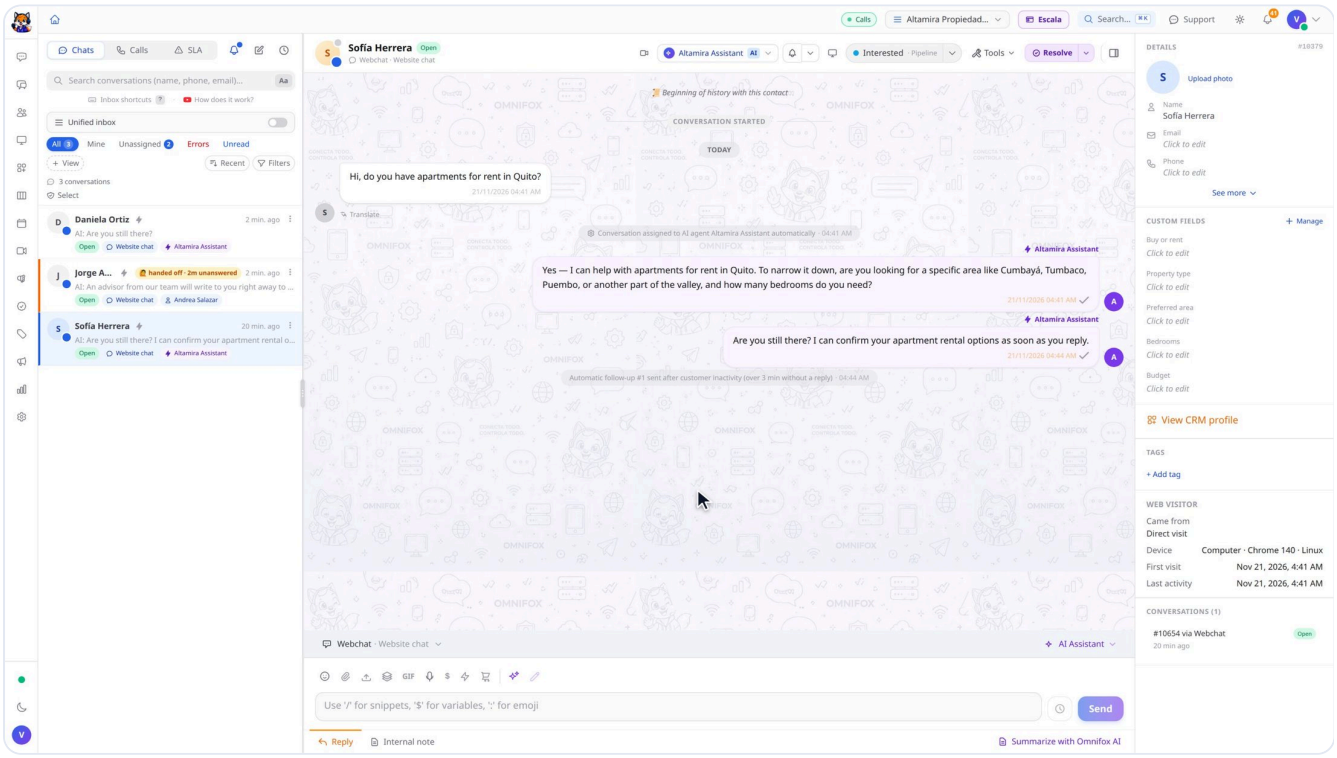
VIDEO STEP 14

Automatic follow-up

And the lead who stops answering? Sofía asked about apartments for rent, the AI asked her a question and Sofía never wrote back.

After three minutes, the AI sent her a friendly reminder on its own, picking up where they left off. If Sofía replies, the conversation goes on; if not, tomorrow it goes to an agent.



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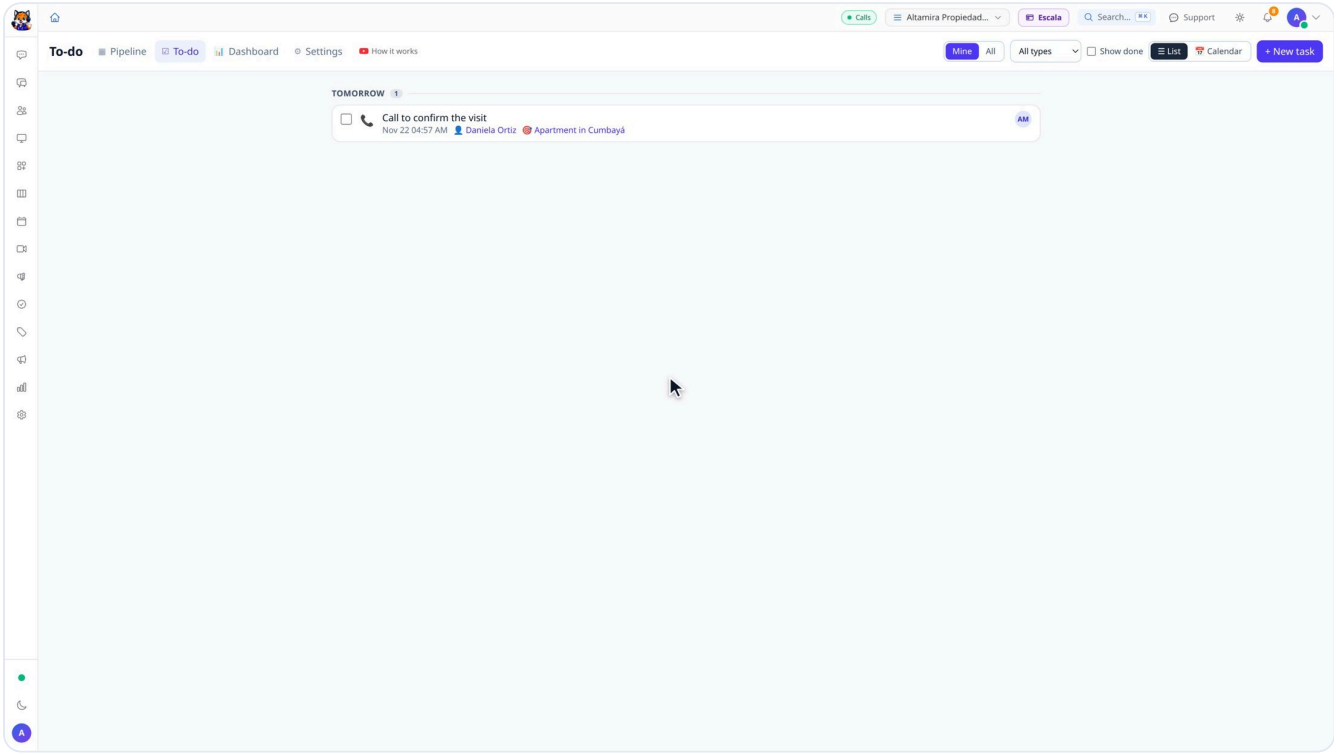
VIDEO STEP 15

The agent's view

This is how an agent sees it. I log in as Andrés Molina.

In Pending he has his task: call Daniela to confirm the visit, with the due date.

And in the pipeline, with Mine, he only sees his own deals. He knows who to call, which property they like and how much they can pay.



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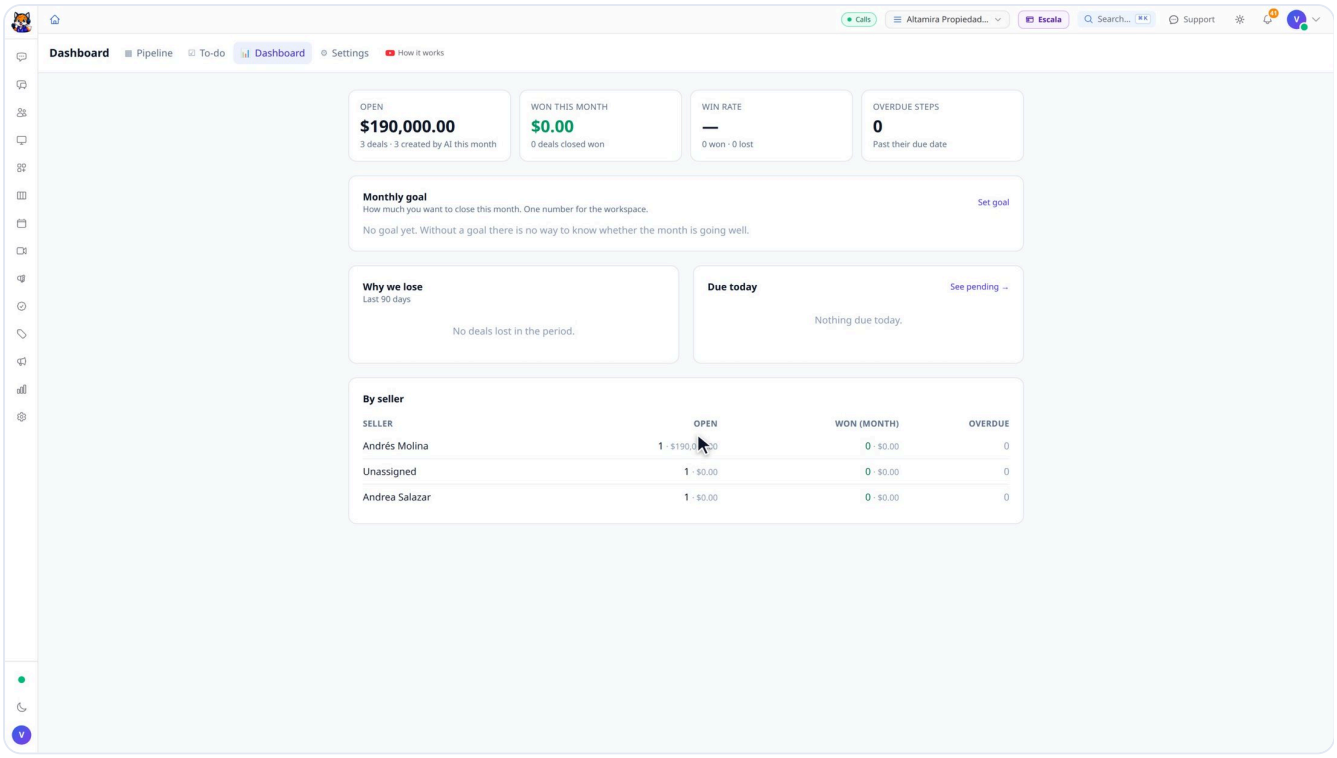
VIDEO STEP 16

The numbers

And whoever runs the agency follows it all on the CRM Board: open deals and their value, what was won this month, the win rate, tasks about to be due and the results of each agent.



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Tips

- Start with a follow-up touch after 1–2 hours; three minutes is only for the demo.
- If you hide a property's exact address, the AI does not say it in the chat; the agent sees it in the appointment.
- With «Ask about budget before booking» the AI uses the budget already saved on the record and does not ask again.
- The AI never makes up time slots: it only offers the free ones in the visits calendar.
- Review in AI agents → View quality the conversations handed to a person to improve the instructions.
- The same setup works for a car dealership: Vehicles instead of Properties and «Schedule a test drive».

And that's it! You connected the property catalog, an AI agent that qualifies and books visits, the CRM with automatic rules, a workflow that distributes leads, the calendar and the follow-up when the customer does not reply.

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!