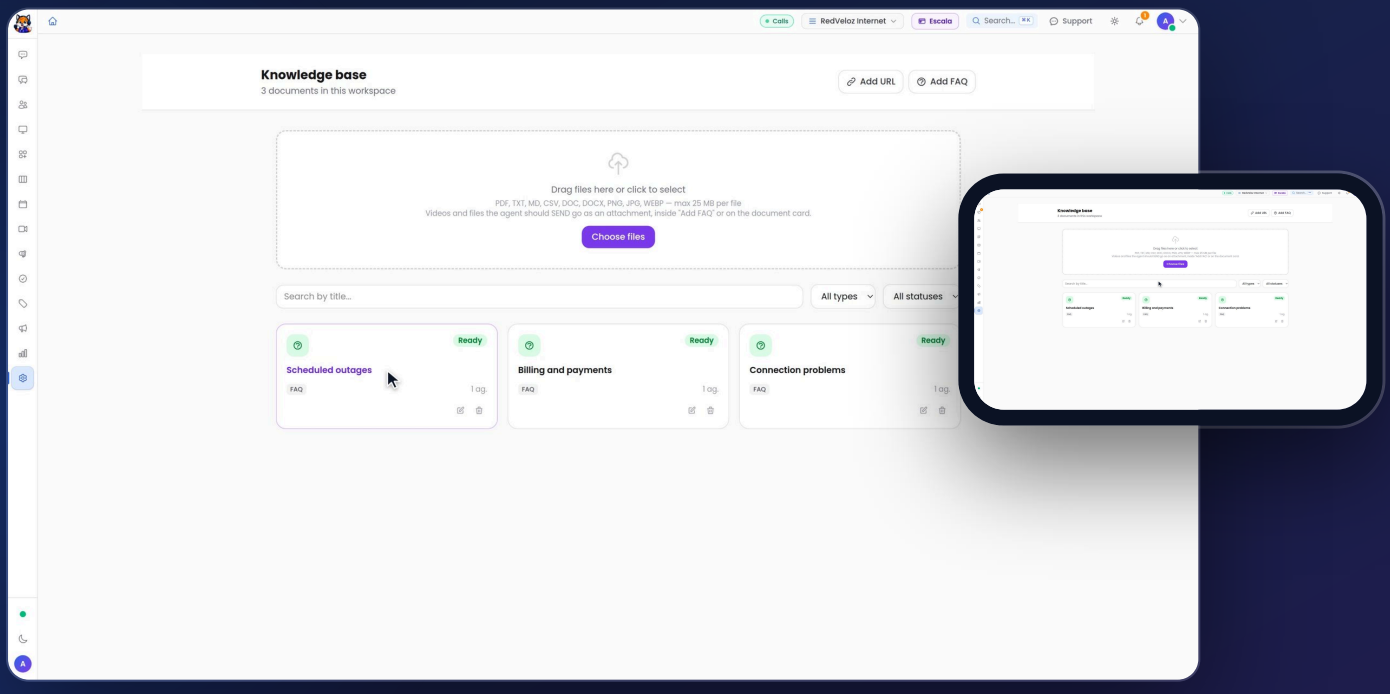
Omnifox

USE CASE · STEP-BY-STEP RECIPE

AI + human support team

The AI answers from your knowledge base and hands every case to the right team, with SLA, Team, a satisfaction survey and reports.



OMNIFOX

AI + human support team

Hi! In this video we build, from start to finish, a customer support operation that combines artificial intelligence and people. The AI answers instantly with what your company knows and, when a case needs someone from the team, it hands it to the right person, with all the context.

The example is RedVeloz, a fictional fiber internet provider in Cuenca. Everything you are about to see really works: customers write through the website chat.

The recipe connects eight Omnifox pieces: the knowledge base, the AI agent, the teams, business hours and SLA, quick replies and notes, the Team, the satisfaction survey and the reports.

THE RECIPE, STEP BY STEP

1. Knowledge base — Settings → Knowledge base → «Add FAQ» (or «Choose files» / «Add URL»). Write the questions and answers about billing, faults and outages → «Save FAQ». It connects to your AI agents automatically.
2. AI agent — AI agents → create or open your agent (Zorro Agile or Pro tier). In Instructions: «answer only from the knowledge base», which team gets each topic and when to close. In Tools turn on «Assign to agent or team» and «Close conversation». In Connections, connect it to the website chat (or your channel).
3. Teams — Settings → Teams → create Billing and Technical support, add their members and choose «Round robin» assignment.
4. Hours and SLA — Settings → Business hours (days, hours, time zone). Then SLA policies → new policy: first response 15 min, resolution 8 h, «business hours only».
5. Quick replies — Settings → Quick replies → create /visit, /payment, /restart with variables such as {{contact.first_name}}. In the inbox, insert them by typing «/».
6. Internal notes — in the conversation, «Internal note» tab (the customer does not see it); mention a teammate with @.
7. Team — create a space (e.g. «Support») with the teams. From the conversation: Tools → Team → «Discuss in Team» → space + question → «Send to Team».
8. CSAT survey — Settings → CSAT: turn the survey on, question, 1–5 star scale, trigger «On resolve or close», delay 0 → Save.
9. Reports — Analytics (conversations, first response, resolution, CSAT), the CSAT page (answers and comments) and AI agents → «View analytics» (resolved without escalation).

WATCH THE VIDEO

https://youtu.be/oiZAzElsCS8

01

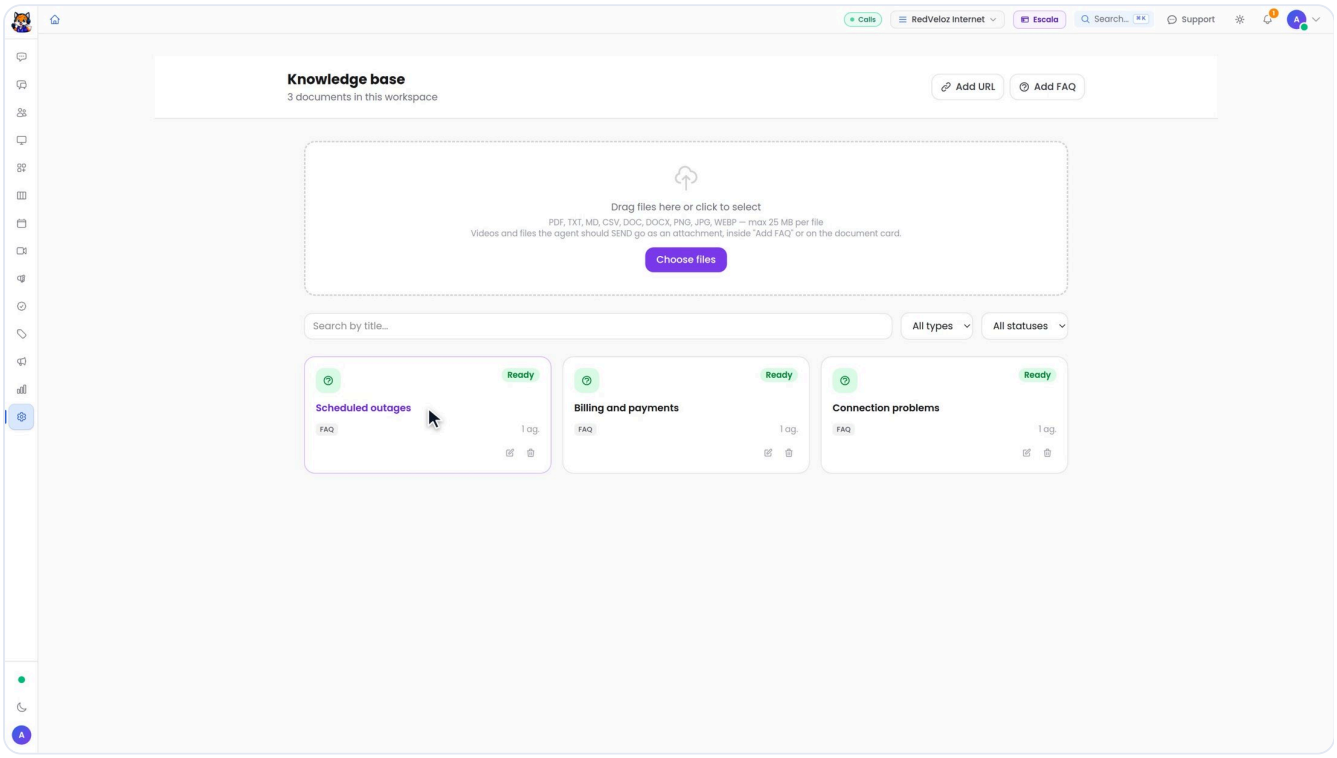
STEP 1

The knowledge base

It all starts with what the AI needs to know. In Settings, Knowledge base, RedVeloz already loaded two FAQ groups: Billing and payments, and Connection problems. You can also upload PDFs and documents, or add your website address.

I add a new one with Add FAQ. The title: Scheduled outages. The question: are there any scheduled outages this week? And the answer, with the day, the time and the areas.

I save. The document is ready, and it is connected automatically to the AI agents of the workspace.



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STEP 2

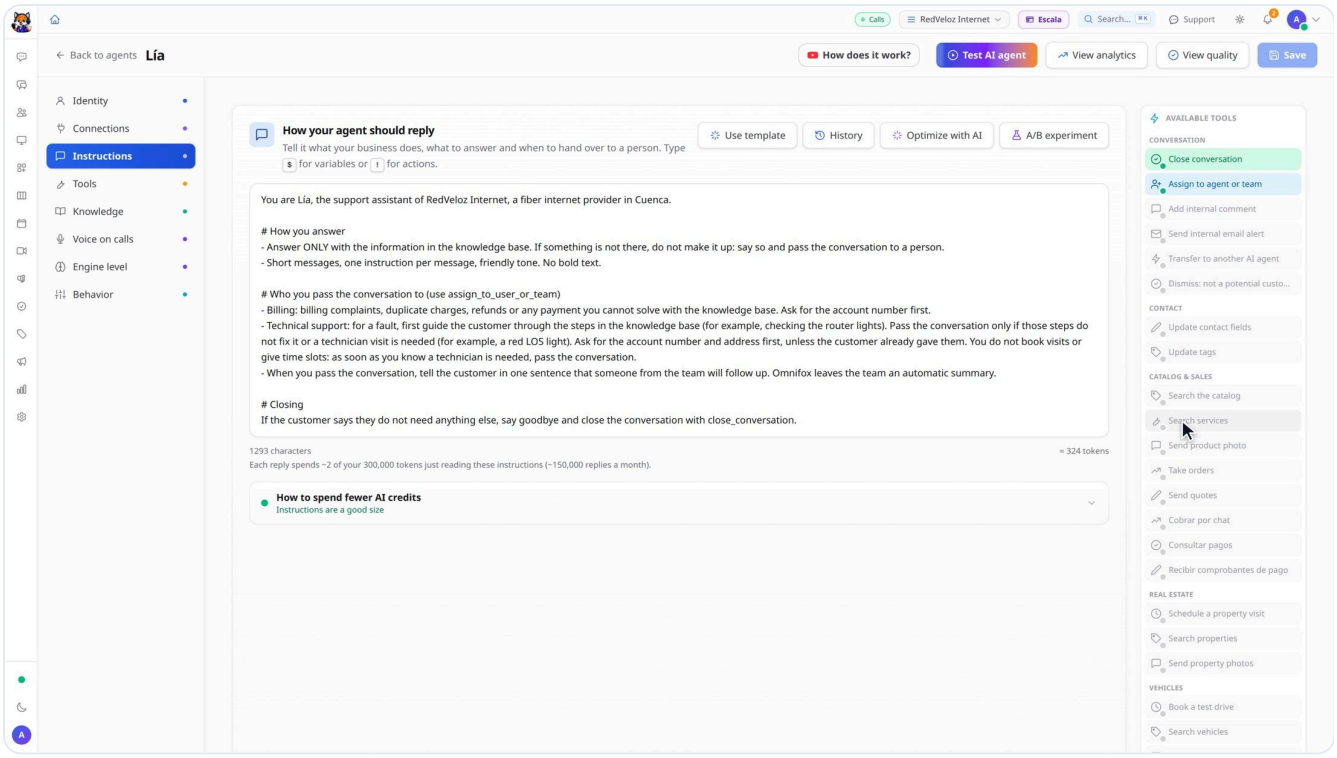
The AI agent

Now the agent. In AI agents there is Lía, the support agent. In Instructions we told her three things: to answer only from the knowledge base, which team gets each topic, and to close the conversation when the customer needs nothing else.

Billing gets charge complaints. Technical support gets faults that the knowledge base steps don't fix, like a red LOS light, which needs a technician visit.

In Knowledge you see the documents she uses, including the one we just created. In Tools, Close conversation and Assign to agent or team are turned on. And in Connections, Lía handles the website chat.

If one day you want to change what she answers, you edit the instructions and try it in the tester, on the right, before saving.



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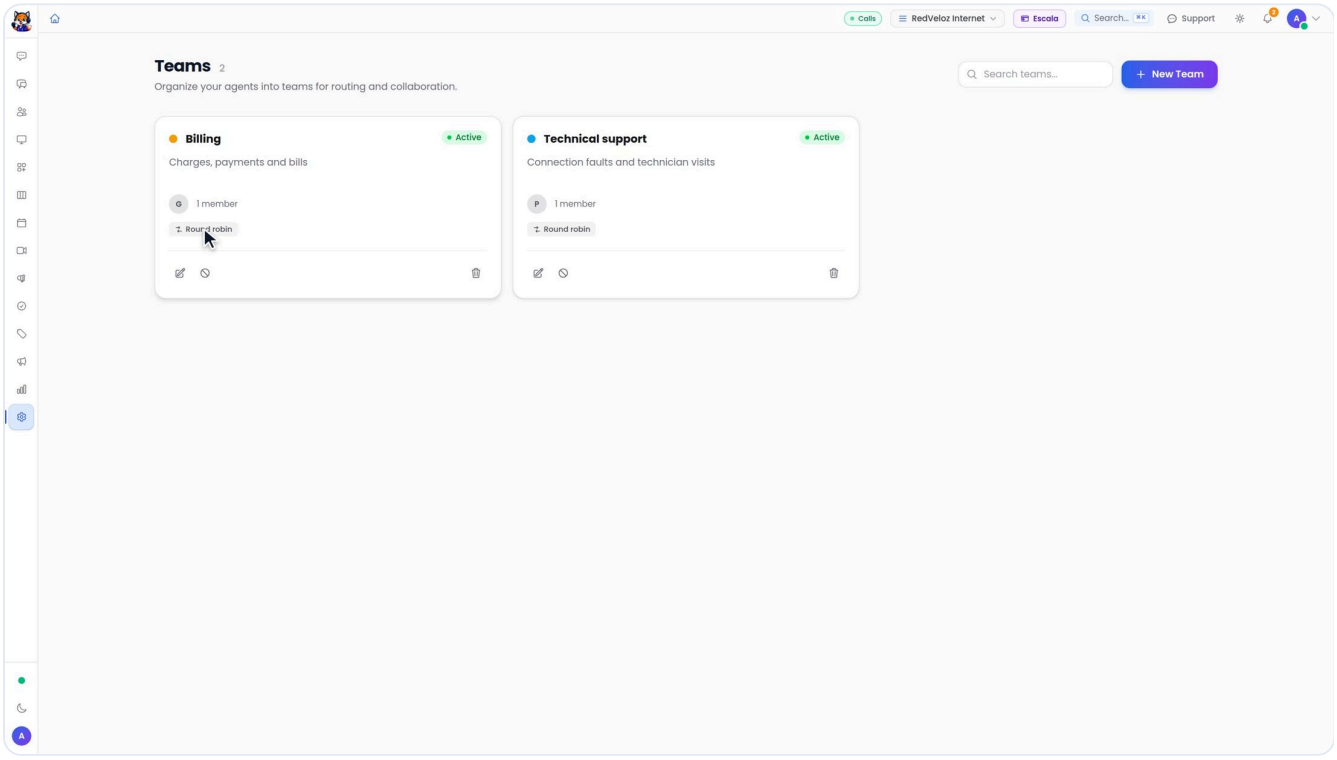
STEP 3

The teams

The teams are in Settings, Teams: Billing, with Gabriel, and Technical support, with Paula. Each team assigns by turns: when the AI hands over a case, Omnifox assigns it to the next available person.



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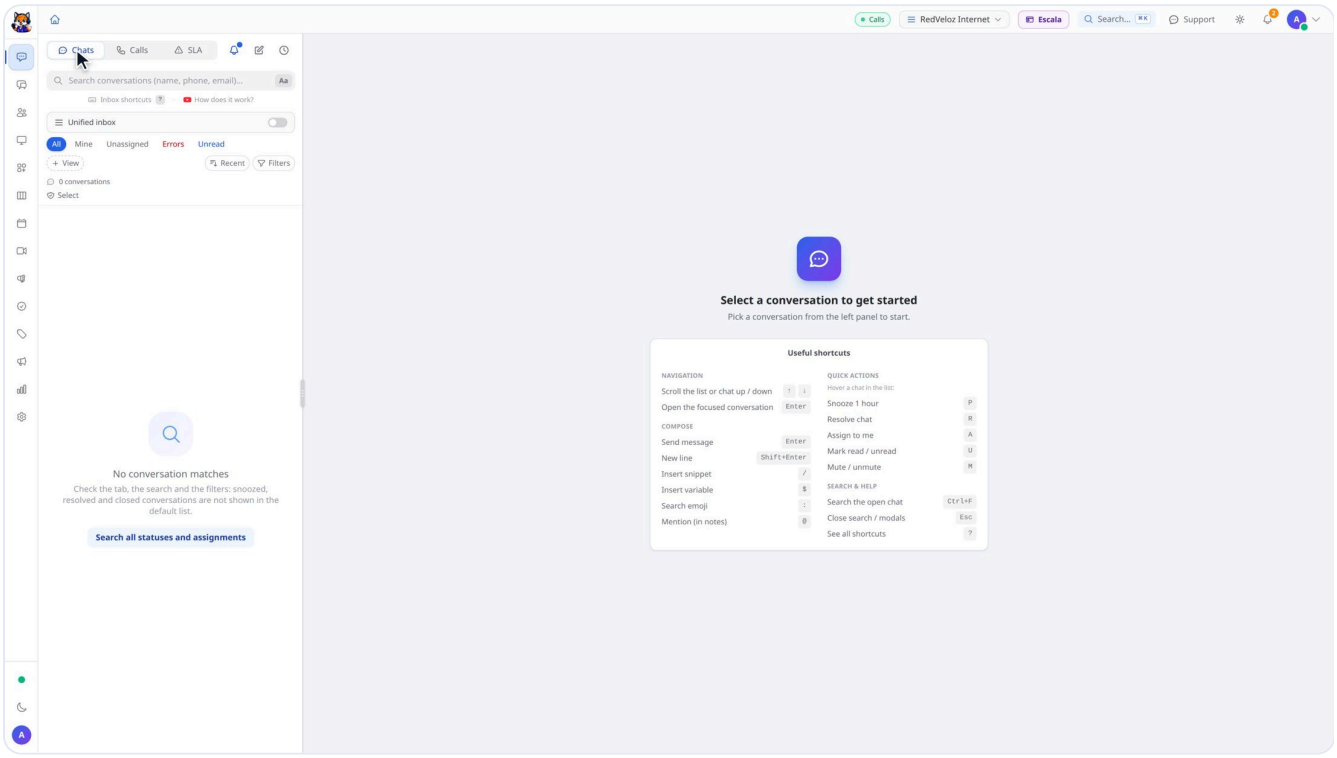
STEP 4

Business hours and SLA

In Business hours, the human team works every day from seven to ten p.m. Outside those hours the AI keeps answering, and tells the customer when a person will contact them.

And in SLA policies there is the goal: first response in fifteen minutes and resolution in eight hours, counting business hours only. If a case gets close to the limit, the inbox flags it.

And in the Inbox, the SLA tab gathers the conversations whose goal is about to expire or already expired, so the urgent ones come first.



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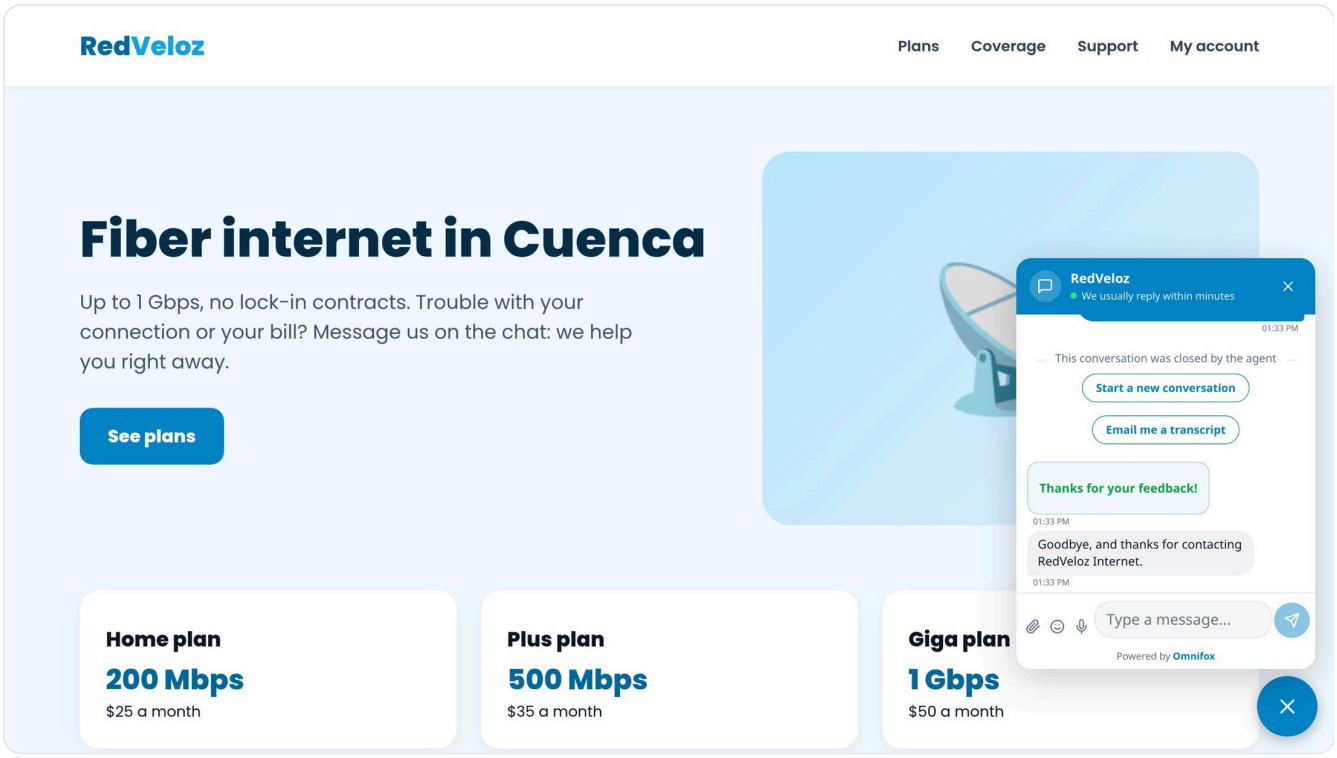
STEP 5

The AI solves it alone

Let's see it with real customers. Marcela goes to the RedVeloz website, opens the chat, types her name and asks whether there is any scheduled outage this week in El Vergel.

Lía answers instantly with the information we loaded a moment ago: the day, the time, and that service comes back on its own.

Marcela says thanks, Lía says goodbye and closes the conversation. Nobody on the team had to step in.



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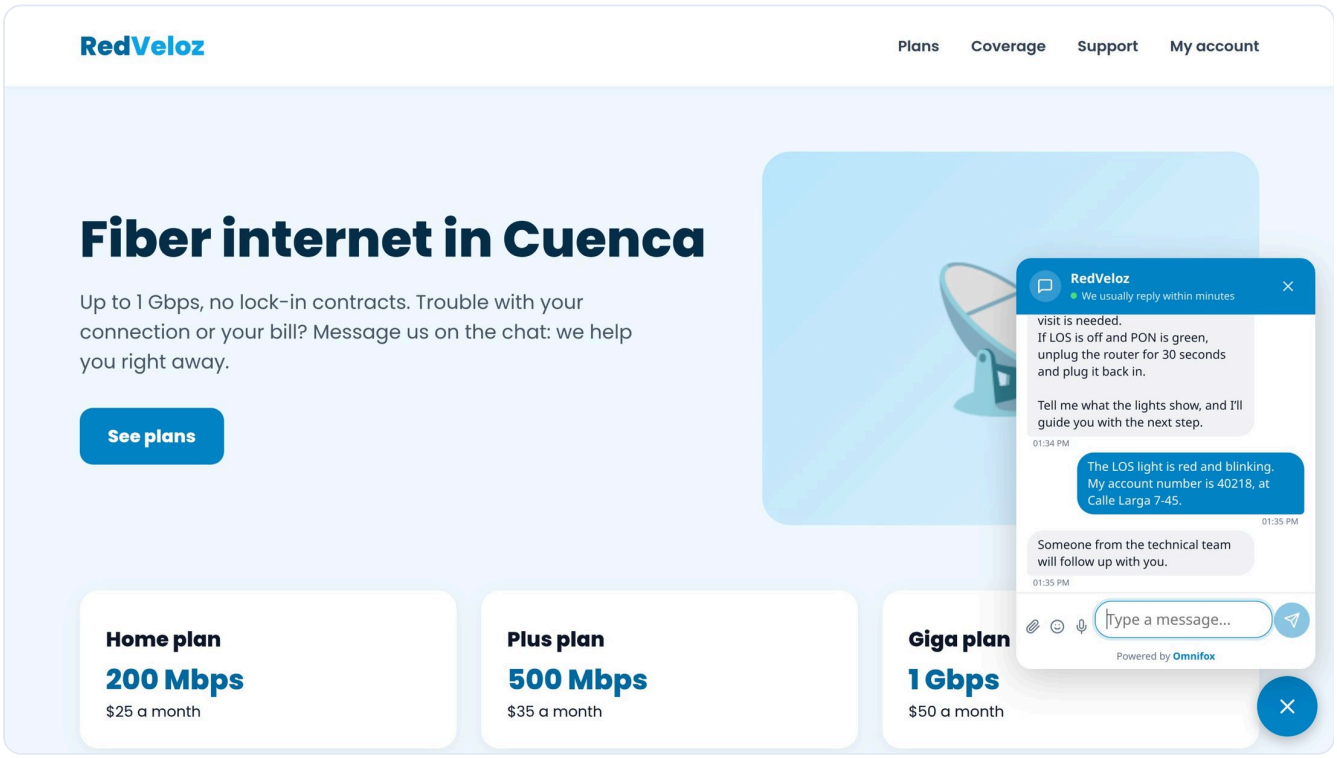
STEP 6

When a person is needed

Now Jorge: he has had no internet since the morning. Lía asks him to check the router lights, just as the knowledge base says.

Jorge replies that the LOS light is red. Restarting won't fix that: Lía tells him a person from the team will take over, and hands the conversation to Technical support.



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STEP 7

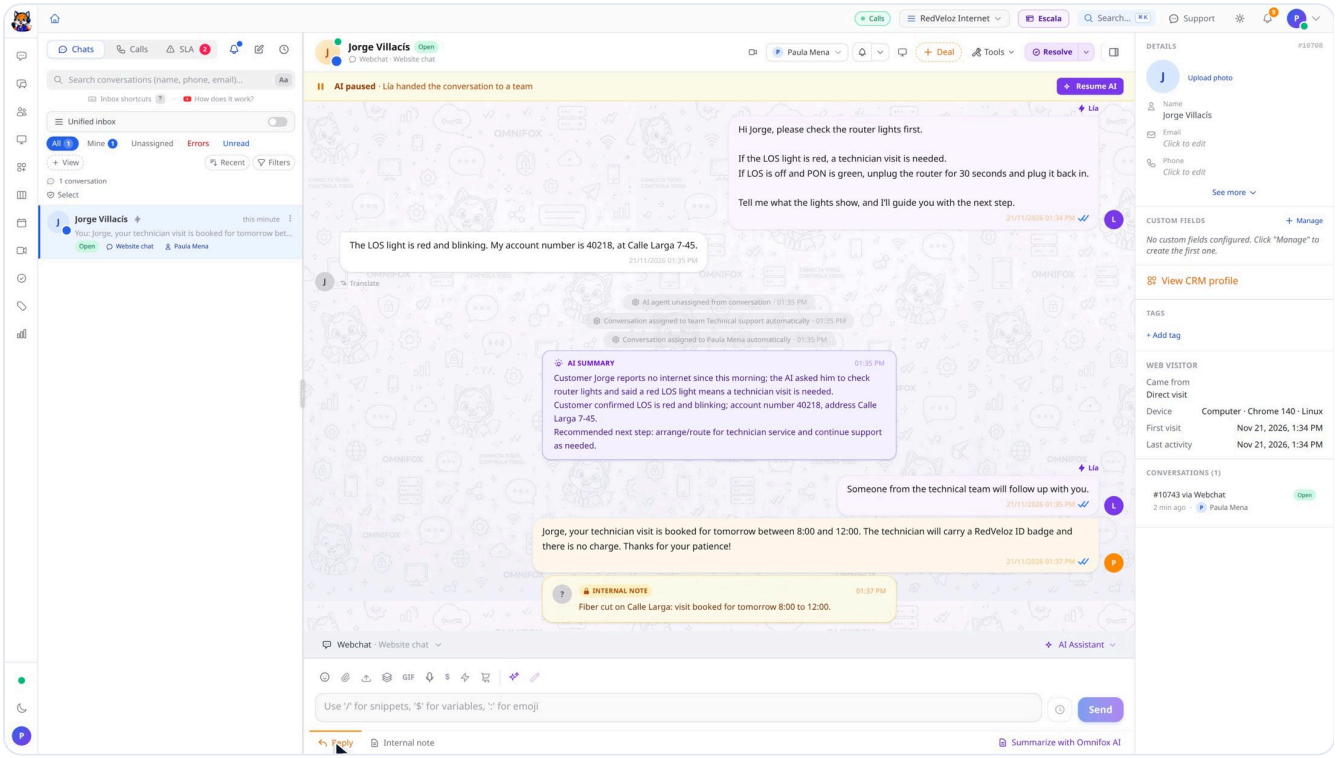
The technician takes the case

This is what Paula, from Technical support, sees. Jorge's conversation was assigned to her by turns, with the handed-over label and how long it has gone without a reply.

At the top is the summary the AI left when handing over the case: what is happening to Jorge, his details and the next step. Paula doesn't have to ask anything again.

She replies with a quick reply: she types slash, visit, and the technician visit message is inserted with Jorge's name. She sends it.

And she leaves an internal note, which the customer doesn't see, so it stays on the case record.



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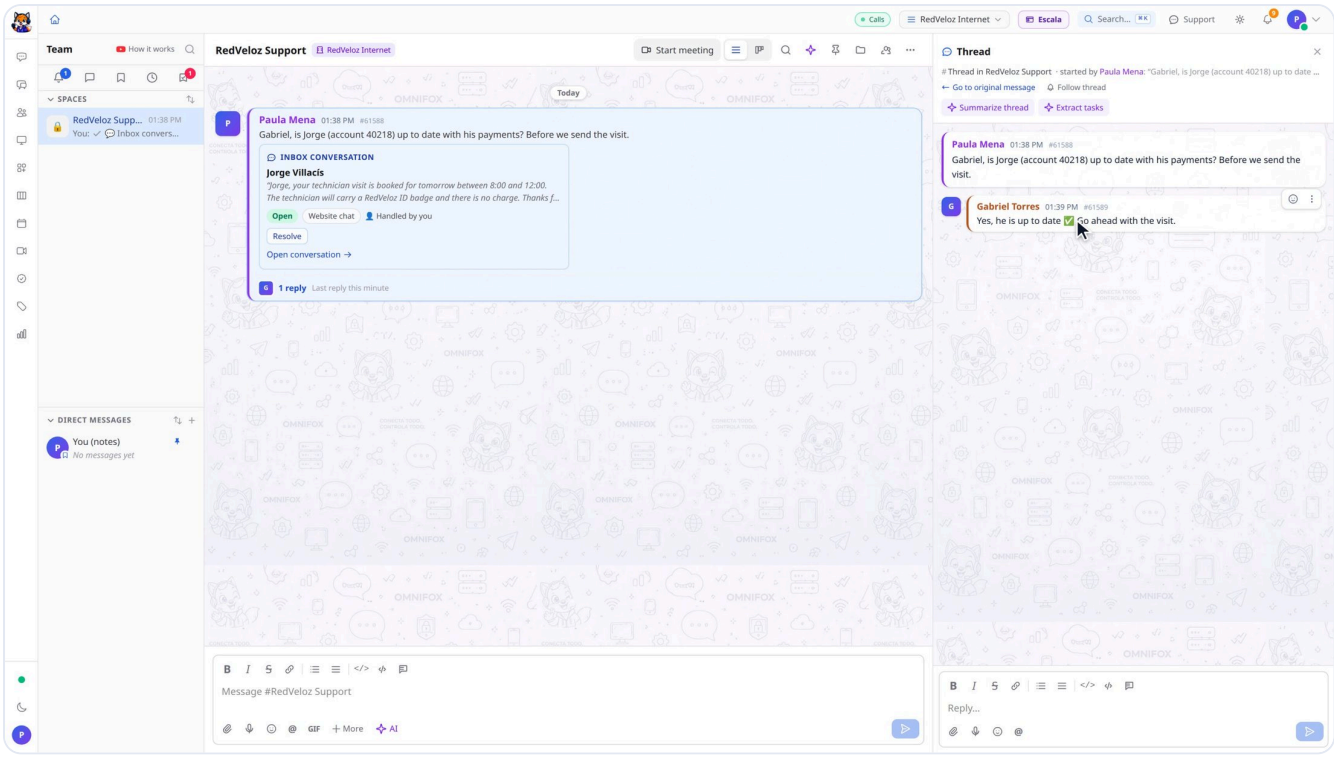
STEP 8

Coordinate in Team

Before sending the technician, Paula wants to confirm with Billing that Jorge is up to date. In Tools, Team, Discuss in Team, she shares the conversation in the RedVeloz Support space, with a question for Gabriel.

In Team the conversation card appears, with its live status, and Gabriel answers in the same thread: he is up to date. Everything is coordinated internally, without writing anything to the customer.



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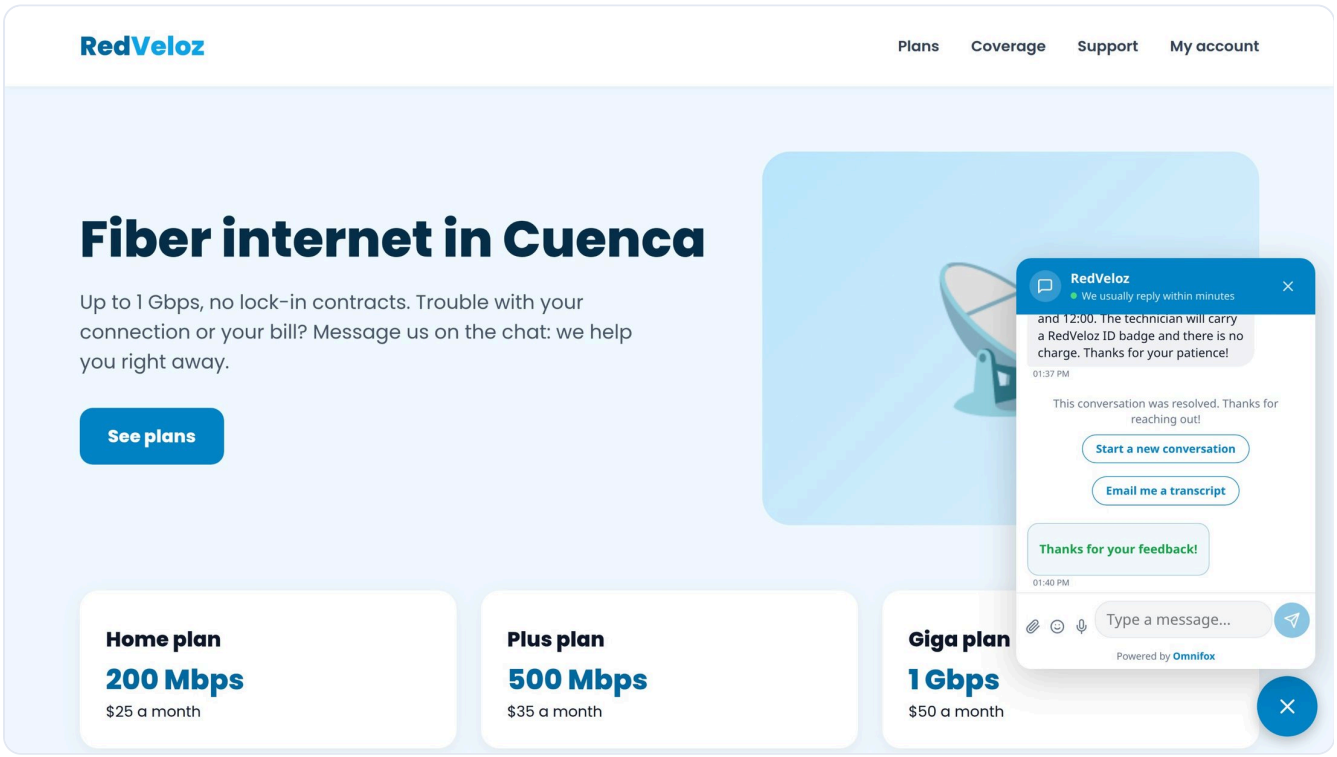
STEP 9

Resolve and measure satisfaction

Paula marks the conversation as resolved. The satisfaction survey is configured in Settings, CSAT: the question, the one to five star scale, and that it is sent on resolve or close, with no delay.

Jorge gets it in the same chat, picks five stars and leaves a comment.



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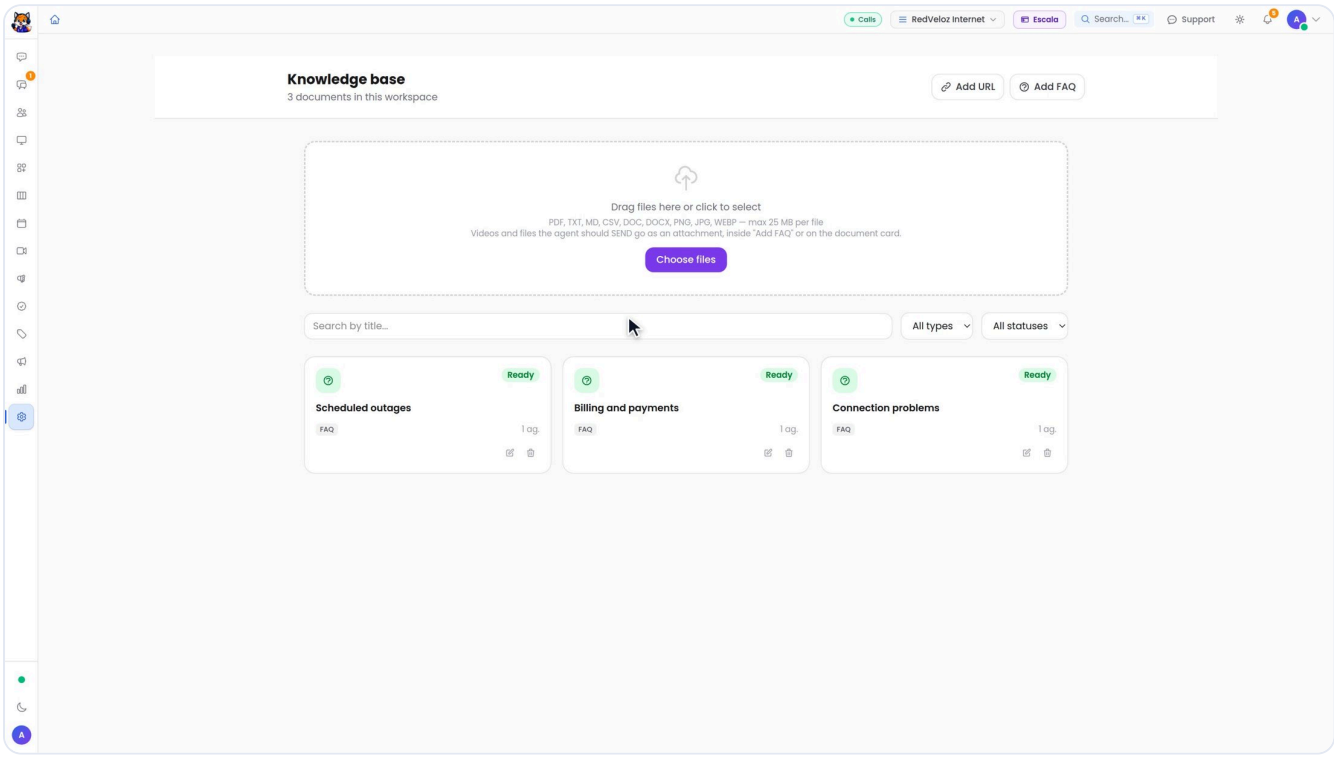
STEP 10

The reports

The head of support follows it all in Analytics: conversations, first response time, resolution time and the satisfaction score.

The CSAT page lists the answers one by one, with their comments. And Lía's analytics show how many conversations she handled and what percentage she solved without handing them to the team.

With these numbers you fine-tune the recipe: if a topic keeps coming up, you add it to the knowledge base, and next time the AI solves it on its own.



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Tips

- Write the knowledge base the way you would answer: real customer questions and short answers.
- In the agent instructions, name the teams exactly as they are called in Omnifox: the AI uses them to hand over.
- When the AI hands over, it leaves an «AI summary» in the conversation: the agent does not have to ask again.
- Outside business hours the AI keeps answering and tells the customer when a person will contact them.
- Use «Discuss in Team» to coordinate between areas without writing anything to the customer.
- Every week, review the CSAT answers with 1–3 stars and add what is missing to the knowledge base.

More tutorials and manuals: omnifox.io/help