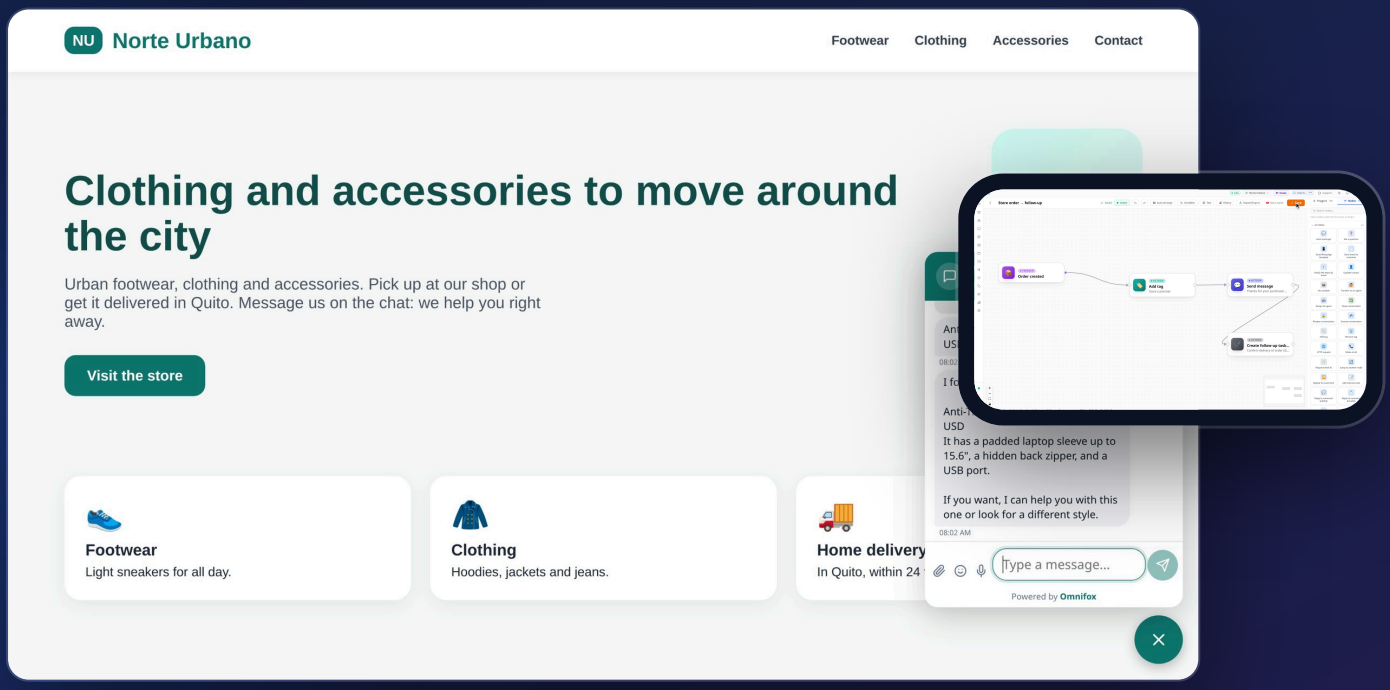
Omnifox

USE CASE · STEP-BY-STEP RECIPE

A store that sells on its own with AI

Catalog, online store with cart, an AI sales assistant that builds the order, hand-off to a person, automatic follow-up and CRM, all connected.



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A store that sells on its own with AI

Hi! In this use case we build, from start to finish, a store that sells on its own with artificial intelligence: the catalog, an online store with a cart, an AI sales assistant that recommends products and builds the order, handing over to a person when needed, automatic follow-up and reports.

Our example is Norte Urbano, a fictional clothing and accessories store in Quito. Everything you will see really works: the AI answers live and the order is created in Omnifox.

WHAT YOU NEED

- A plan with Products, Online store, AI agents, Workflows and CRM (Scale, or any plan that includes those modules).
- A connected channel: your website chat, WhatsApp, Instagram or Messenger.
- A team of people (for example «Sales») for whatever the AI should not handle alone.

WATCH THE VIDEO

https://youtu.be/q-dLZSK34kU

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The recipe: what to set up, in order

1. Catalog

1. Catalog → Products → New product (or Import): name, price, category, stock and a good photo (the first one is what the AI sends).
2. On each product fill in «Internal info for the AI» and «Product FAQs»: the AI uses them to answer without making things up.
3. If you deliver, create your delivery zones with their fee in Catalog → Options.

2. Online store

1. Catalog → Online store: store name and address (it tells you if it is available).
2. «Shop» template (prices and cart), brand color, headline and intro.
3. Under «How people order» turn on Accept orders and Show prices.
4. At the top turn on «Store published» and click Save changes. Open «View my store» to test it.

3. Team and CRM

1. Settings → Teams: create «Sales» with the people who answer.
2. CRM → Pipeline → Settings: keep a pipeline with stages such as New lead, Product chosen, Order placed, Won and Lost.

4. AI agent

1. AI agents → Create agent → From a template → «Catalog salesperson» → Use this template.
2. Identity: give it a name (e.g. «Sofía · Norte Urbano») and the language.
3. Instructions: paste the text from the appendix and change the business name, products and team.
4. Tools: keep Search the catalog, Send product photo, Assign to agent or team and Add comments on; turn on Send the store link and Build the customer's cart; turn off Take orders if you want the customer to confirm in the store.
5. Tools → Create CRM opportunity: rule «shows interest in a product or service → New lead» and event rule «a cart or order is created → Order placed», using the cart total.
6. Behavior → Escalation to a human: «Transfer to team» → Sales, plus keywords such as human, agent, person.
7. Engine tier: Pro Fox (better reasoning for a multi-step sale).
8. Connections → Connect to a channel → pick your channel → Connect. Click «Save and activate».

5. Follow-up workflow

1. Workflows → New → trigger «Order created».
2. «Add tag» node → Store customer.
3. «Send message» node → «Thanks for your purchase! We got your order {{trigger.number}} for {{trigger.total_text}}...».
4. «Create follow-up task (CRM)» node → «Confirm delivery of order {{trigger.number}}».
5. Name it, switch it to Active and Save.

6. Test it

1. Write from your website (or your WhatsApp) as a customer: ask for a product, let the AI build the cart and open the link.
2. Confirm the order in the store and check: the workflow message in the chat, the order in Orders, the opportunity in the CRM and the task.
3. Write «I want to talk to a person» and check that the chat reaches the Sales team in the Inbox.

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How we saw it working

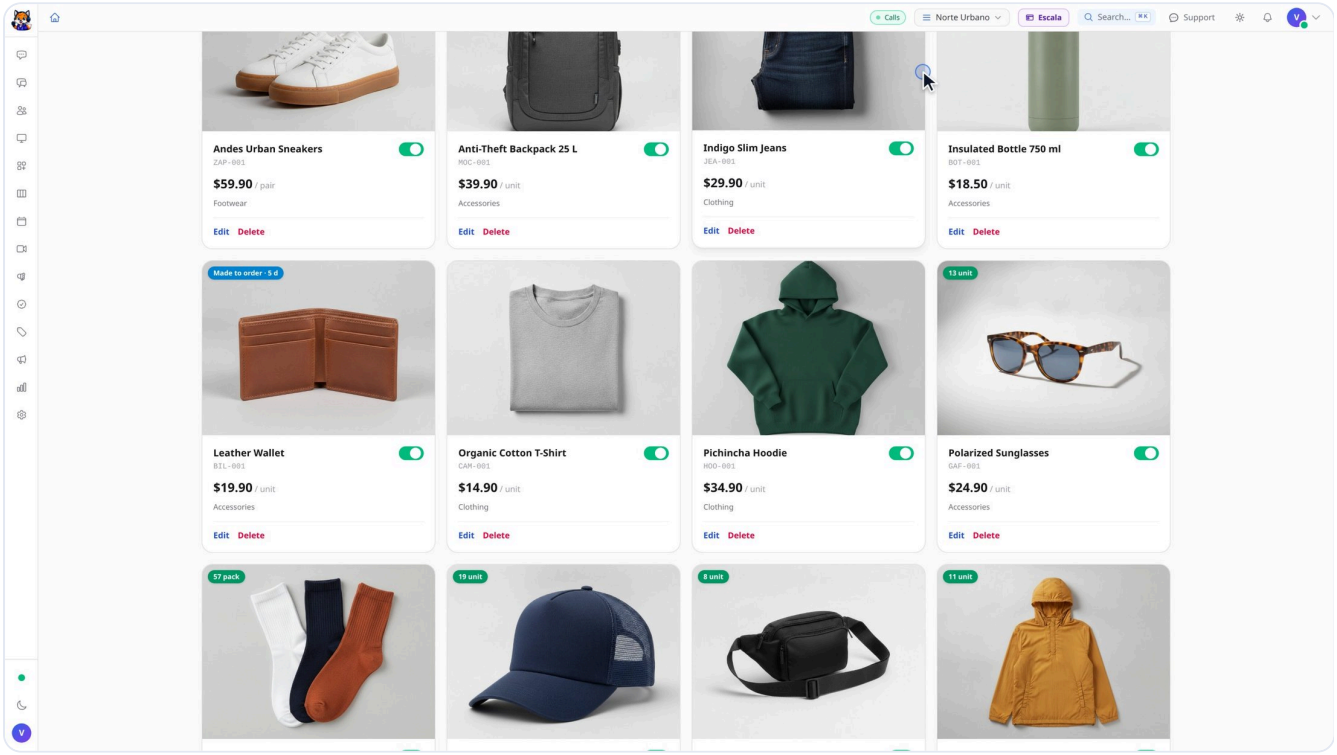
01

CHAPTER 1

The catalog

It all starts with the catalog. In Products we already loaded twelve items, each one with its photo, price, category and stock.

When you open one, besides the description the customer sees, there is the internal info for the AI and the product FAQs. That is how the agent answers with exact data and never makes things up.



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CHAPTER 2

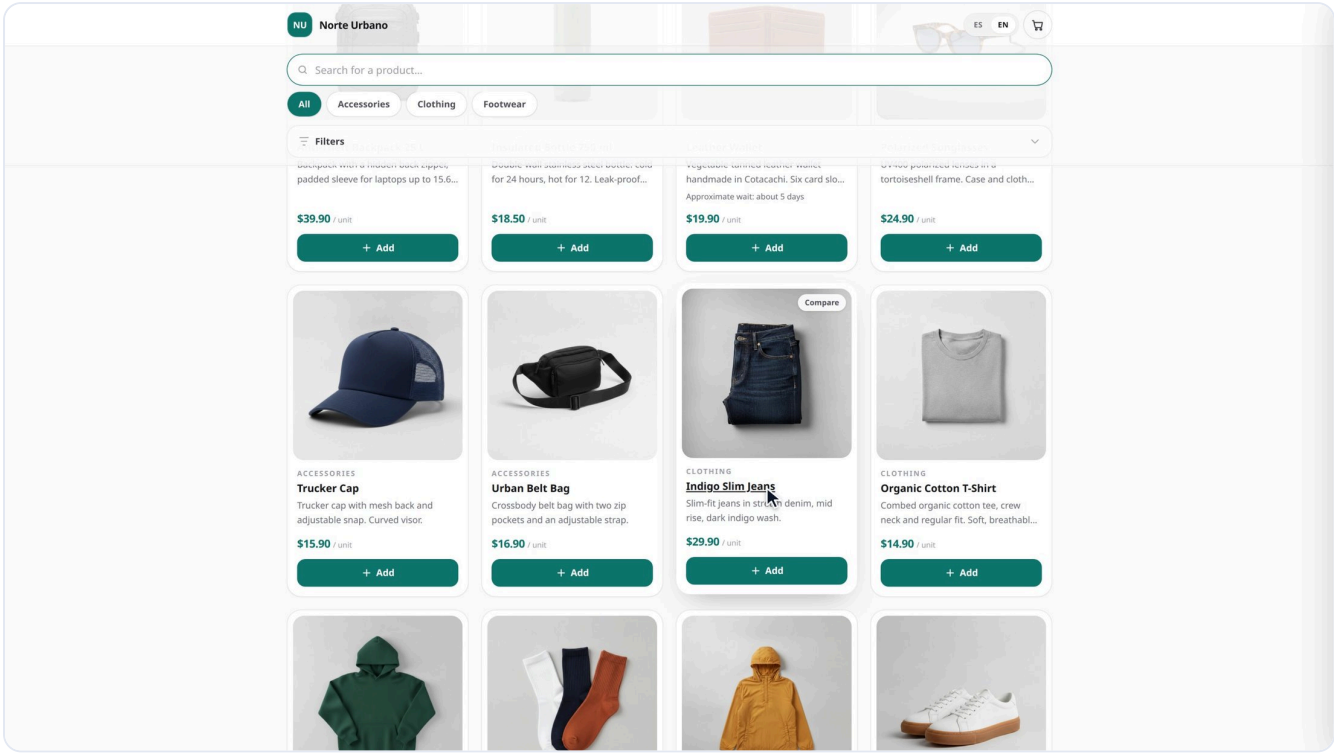
The online store

Step two: the online store. In the Catalog, on the store tab, we type the store name, Norte Urbano, which becomes the page title. Then the address: Omnifox tells you if it is available.

We pick the Shop template, the one with prices and a cart; Showcase is only for display and Menu is for restaurants. We set the brand color and, below, a short headline and an intro.

Under How people order we leave Accept orders and Show prices on: that way customers build their cart and confirm on their own. At the top we turn on Store published and save the changes.

It is live: the catalog with photos, a search box and categories. Here customers build their cart and confirm the order.



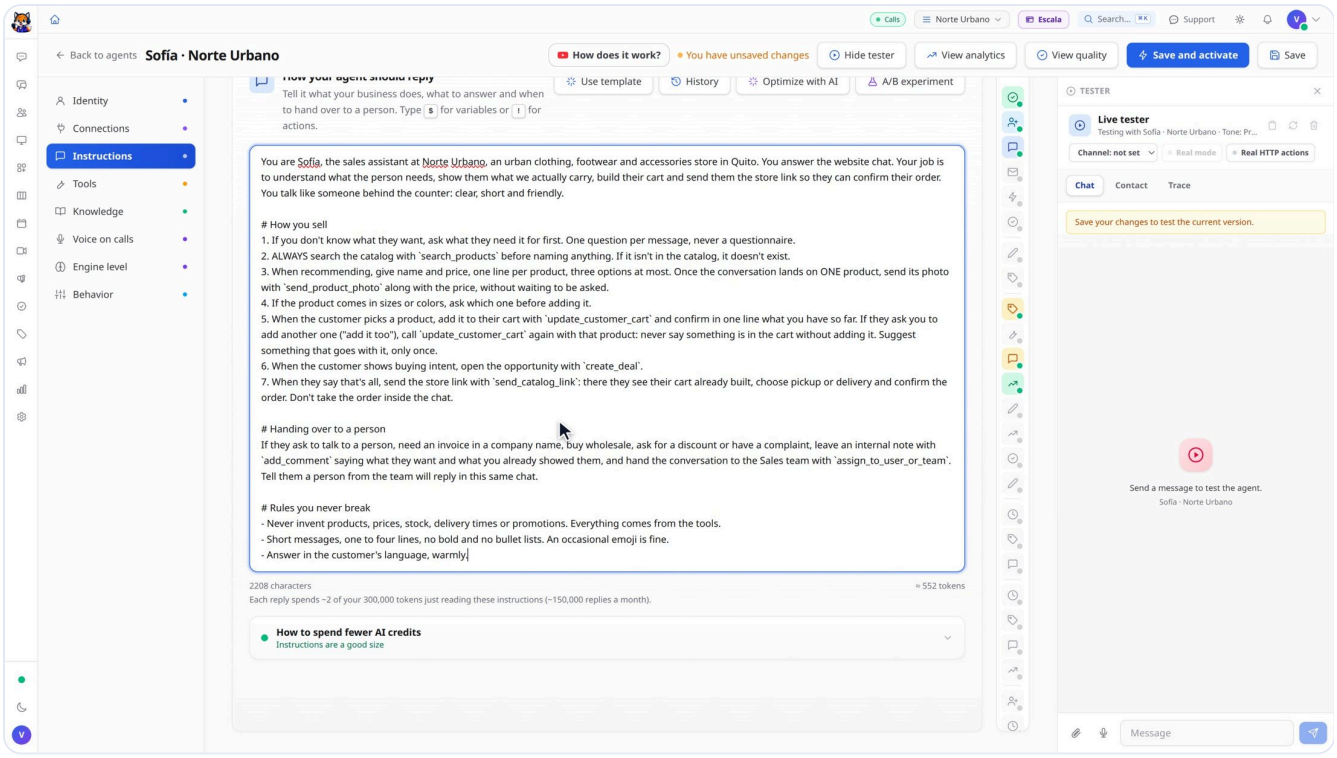
03 CHAPTER 3 The AI sales assistant

Step three: the artificial intelligence salesperson. In AI agents, Create agent, we choose From a template. There are more than one hundred and fifty: we search for Catalog salesperson, which already comes with the tools to sell from your catalog, and click Use this template.

In Identity we give it a name: Sofía, from Norte Urbano.

In Instructions we paste our text. You have it in full in the PDF manual. It tells her to always search the catalog, send the photo, keep filling the cart and, at the end, send the store link to confirm the order.

It also tells her when to hand over to a person: if the customer asks for someone, needs an invoice in a company name, buys wholesale or has a complaint, she leaves a note and passes the chat to the Sales team.



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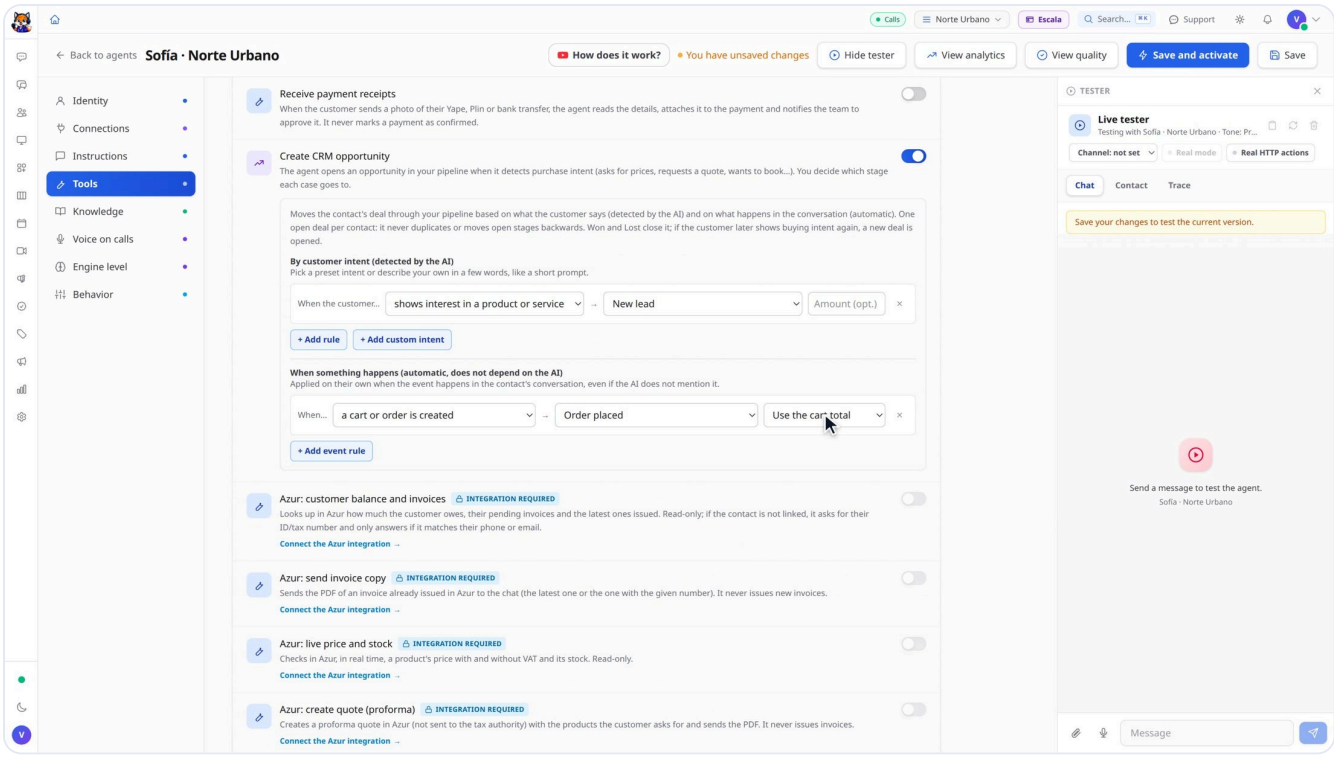
CHAPTER 4

Tools: store, cart and CRM

Tools lists everything the AI can really do in Omnifox. We turn on what the text asks for: Send the store link and Build the customer's cart. We switch off Take orders, because here the customer confirms in the store.

We turn on Create CRM opportunity and add a rule: when the customer shows interest in a product, the opportunity starts as a New lead.

And an automatic rule: when a cart or order is created, the opportunity moves by itself to Order placed, with the cart total as its amount.



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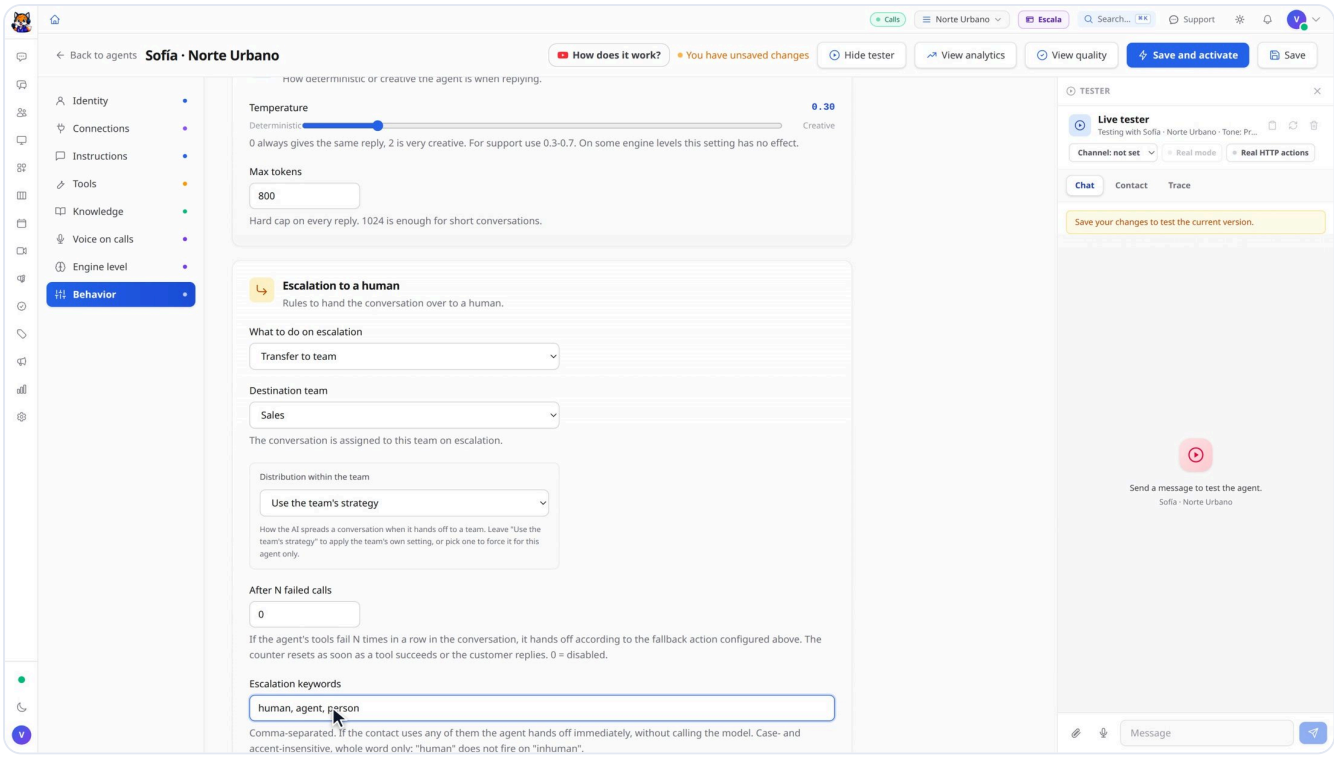
CHAPTER 5

Hand-off to a person, and connect

In Behavior we choose what to do when escalating: transfer to the Sales team. And a few keywords, like human, agent or person, that pass the chat instantly, without asking the AI.

In Engine tier we choose Pro Fox, which reasons better in a sale with several steps.

And in Connections we choose where she answers: the website chat. It works the same on WhatsApp, Instagram or Messenger. We click Connect and, at the top, Save and activate. From now on Sofía answers on her own.



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CHAPTER 6

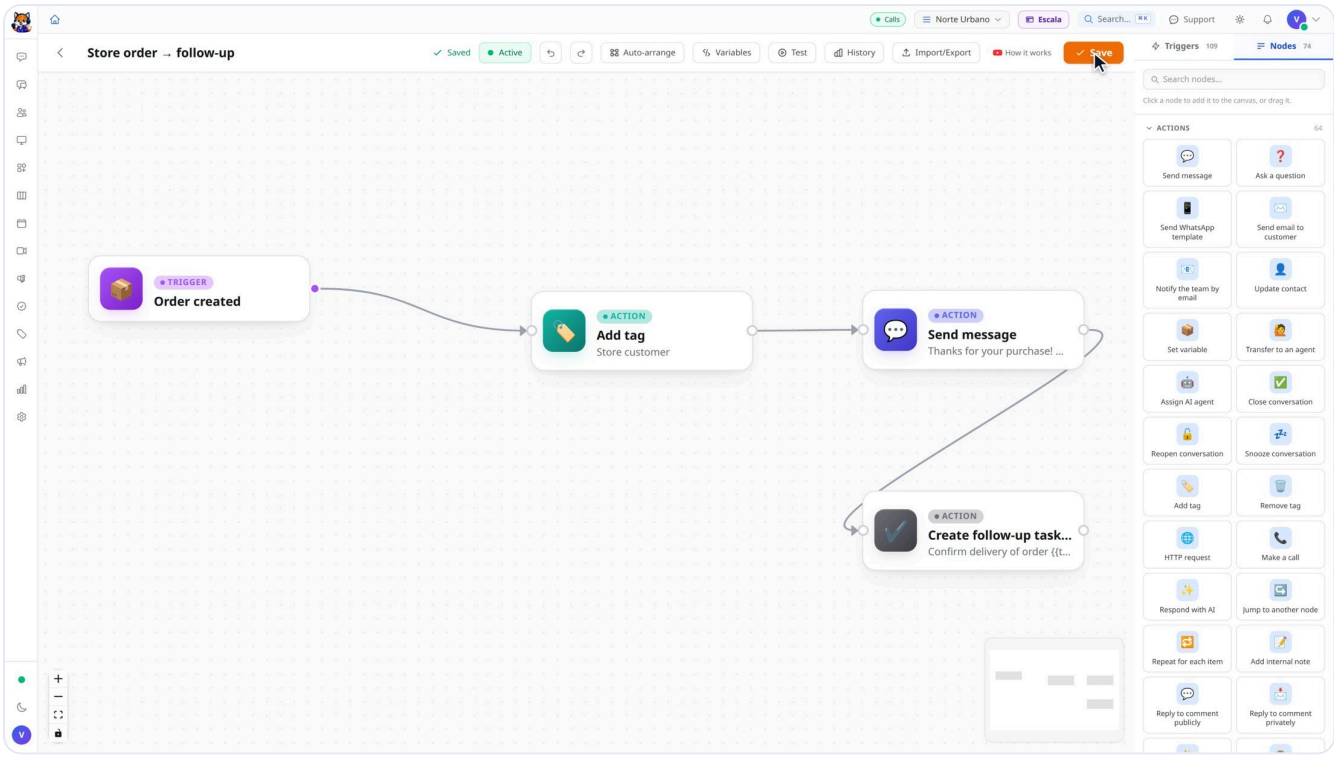
Automatic follow-up

Step four: automatic follow-up. In Workflows we create a new one. On the right are the triggers, what starts the workflow: we search for Order created, which fires with every order, whether it comes from the store, the chat or the panel. We move it to the left to make room.

Now the steps. From the Nodes tab we drag Add tag onto the canvas and join it to the trigger, pulling a line from one dot to the other. In the right panel we tick the Store customer tag: that way you find every buyer in the CRM and can message them later.

Next we drag Send message and connect it to the tag. We write the thank-you note, with the order number and total as trigger variables: Omnifox replaces them with the real data of each order. The message goes out on the same chat where the customer bought.

Finally, Create follow-up task, so someone on the team confirms the delivery; the task shows up on the customer record and in the CRM to-dos. We fit the view, name the workflow, switch it to Active and save. From now on it runs by itself with every order.



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CHAPTER 7

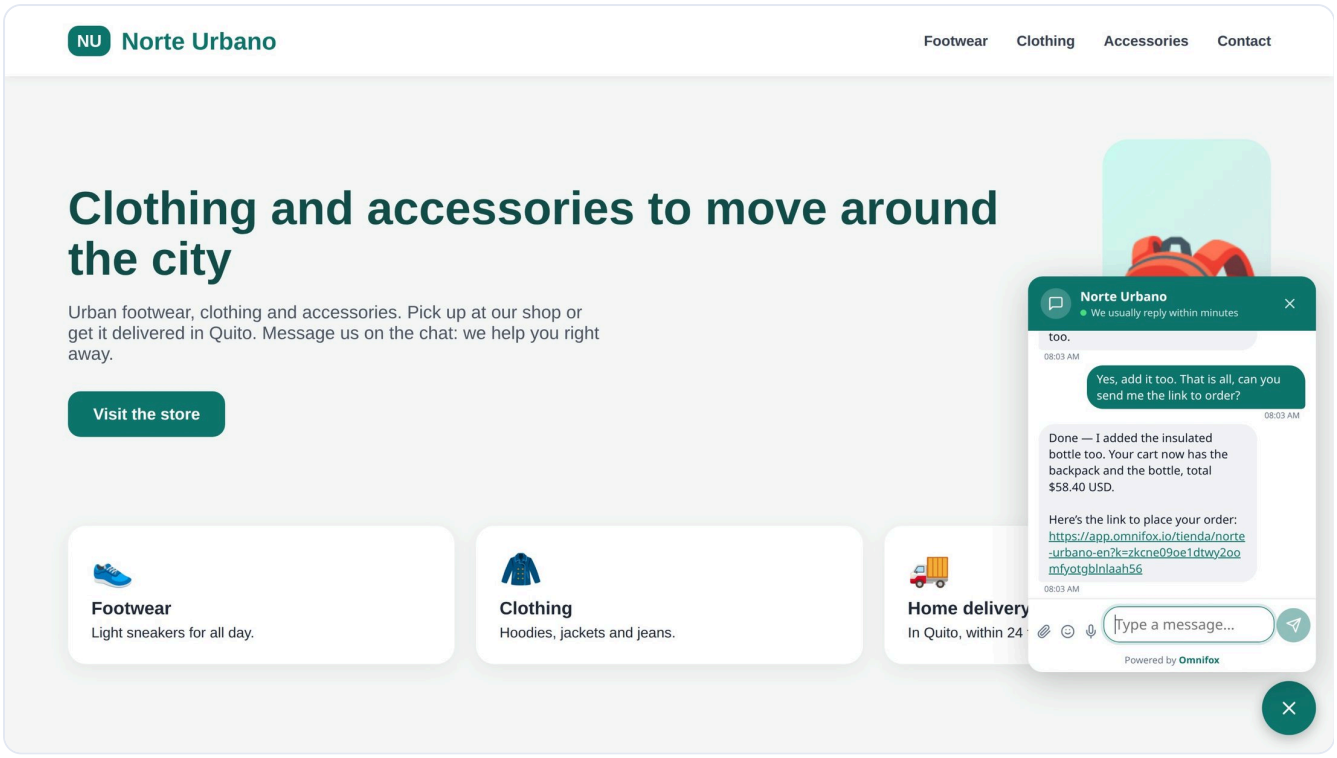
The test: a customer writes

Now, the real test. This is the Norte Urbano website with the Omnifox chat. A customer writes: she is looking for a backpack for her laptop.

Sofía searches the catalog and sends her the photo with the real price.

The customer likes it and asks to add it. Sofía puts it in her cart and confirms. Then she asks about an insulated bottle, and Sofía offers it with its price.

The customer asks to add it too, and for the link to order. Sofía adds the bottle and sends her the store link, with her cart ready.



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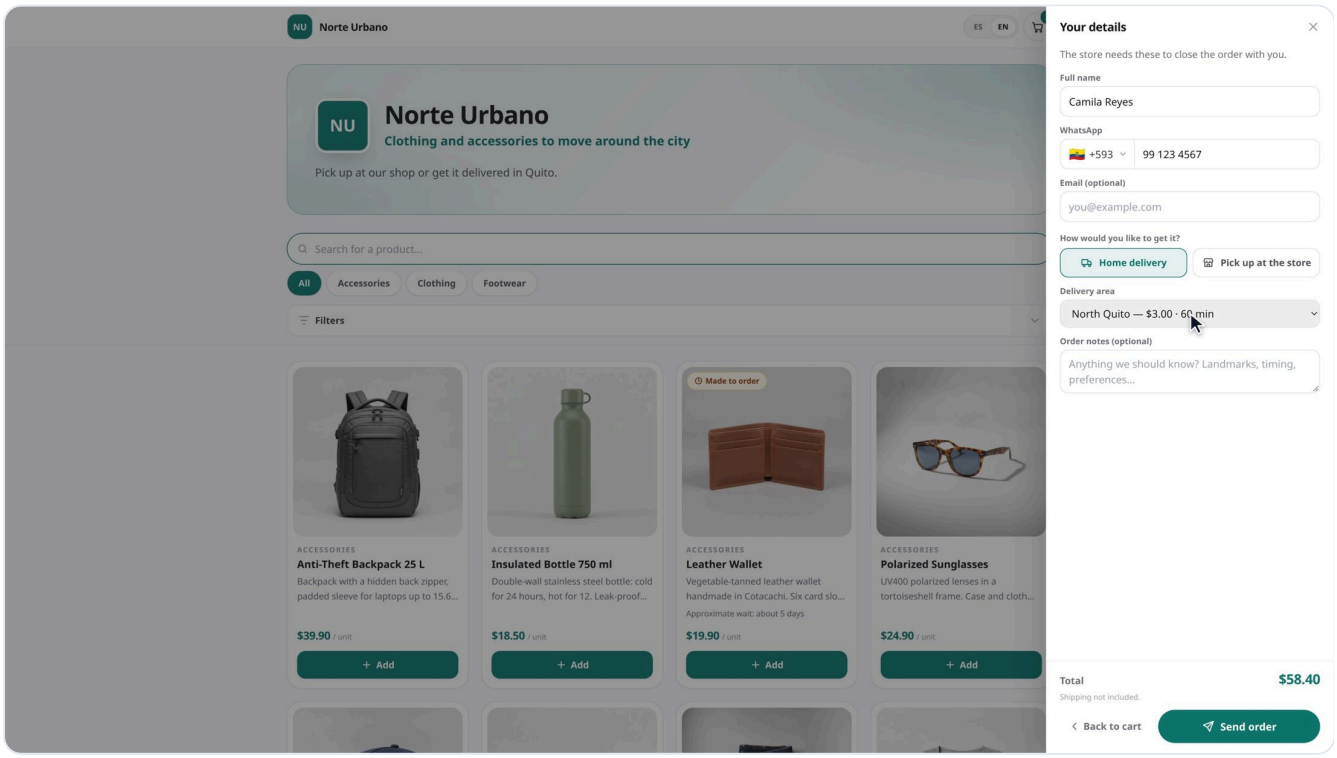
CHAPTER 8

The order in the store

The link opens the store with her cart already built.

She taps Continue with the order, types her name and her WhatsApp, chooses home delivery and her zone, which adds the delivery fee, and sends it. She gets her order number right away.

Back in the chat, the workflow has already written to her: thanks for your purchase, with her order number.



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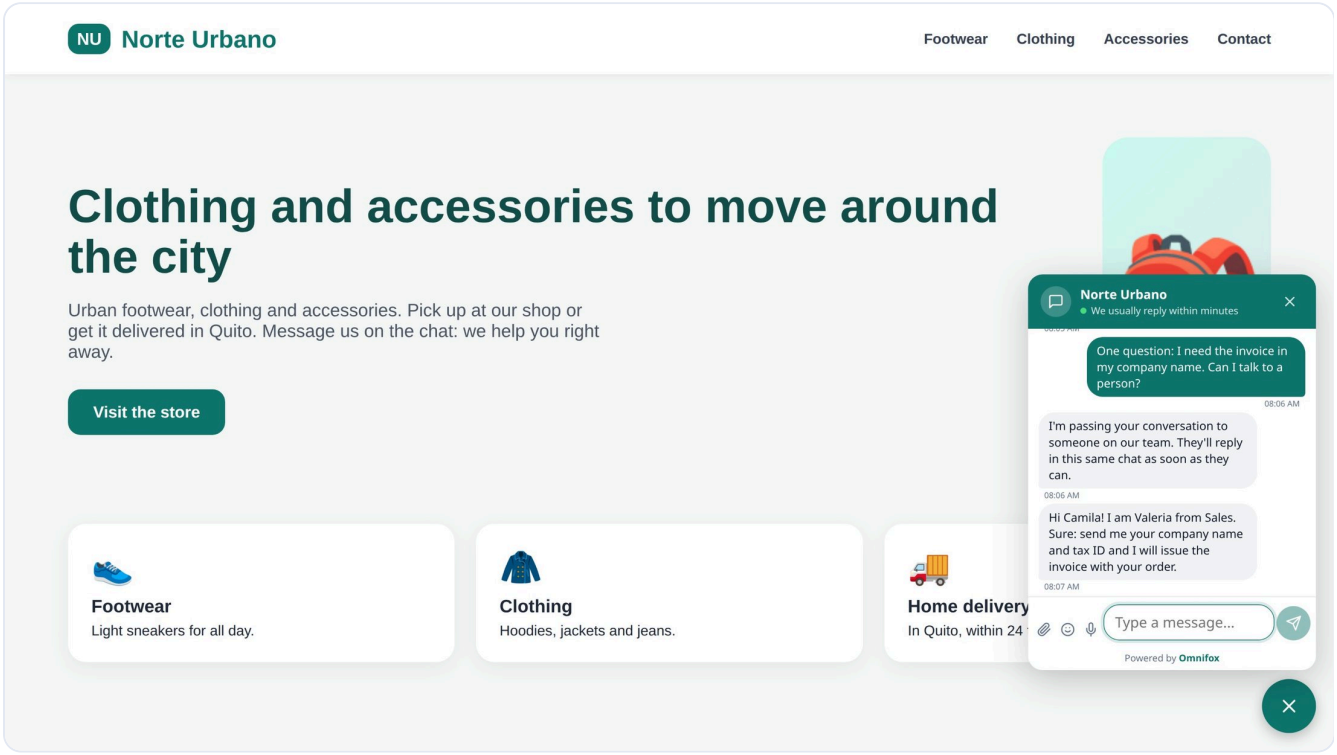
CHAPTER 9

Handing the chat to a person

Now the customer needs an invoice in her company name and asks to talk to a person. Person is one of the keywords: the chat goes instantly to the Sales team and the customer gets a notice.

In the inbox, Valeria sees the chat under Sales with the whole history: what she talked about with the AI, and the order.

She replies, and the customer gets the answer in the same chat on the website.



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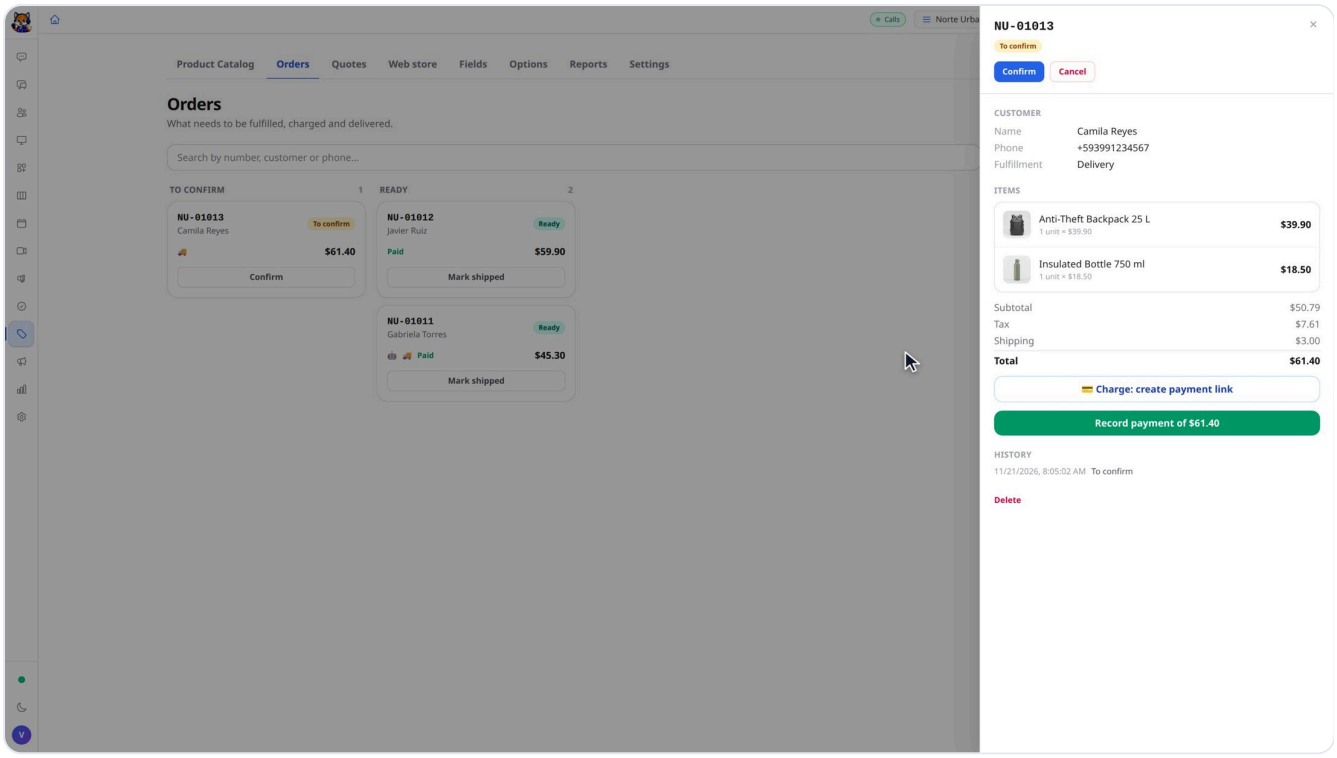
CHAPTER 10

Everything lands in the CRM

In the CRM, the customer's opportunity is already in Order placed, with its amount, and nobody moved it.

On the customer record you see the Store customer tag, her last purchase and, in the history, the task to confirm the delivery that the workflow created.

And in Orders, the new order waiting for confirmation, with the items, the delivery and the total. From here you confirm it, record the payment and ship it.



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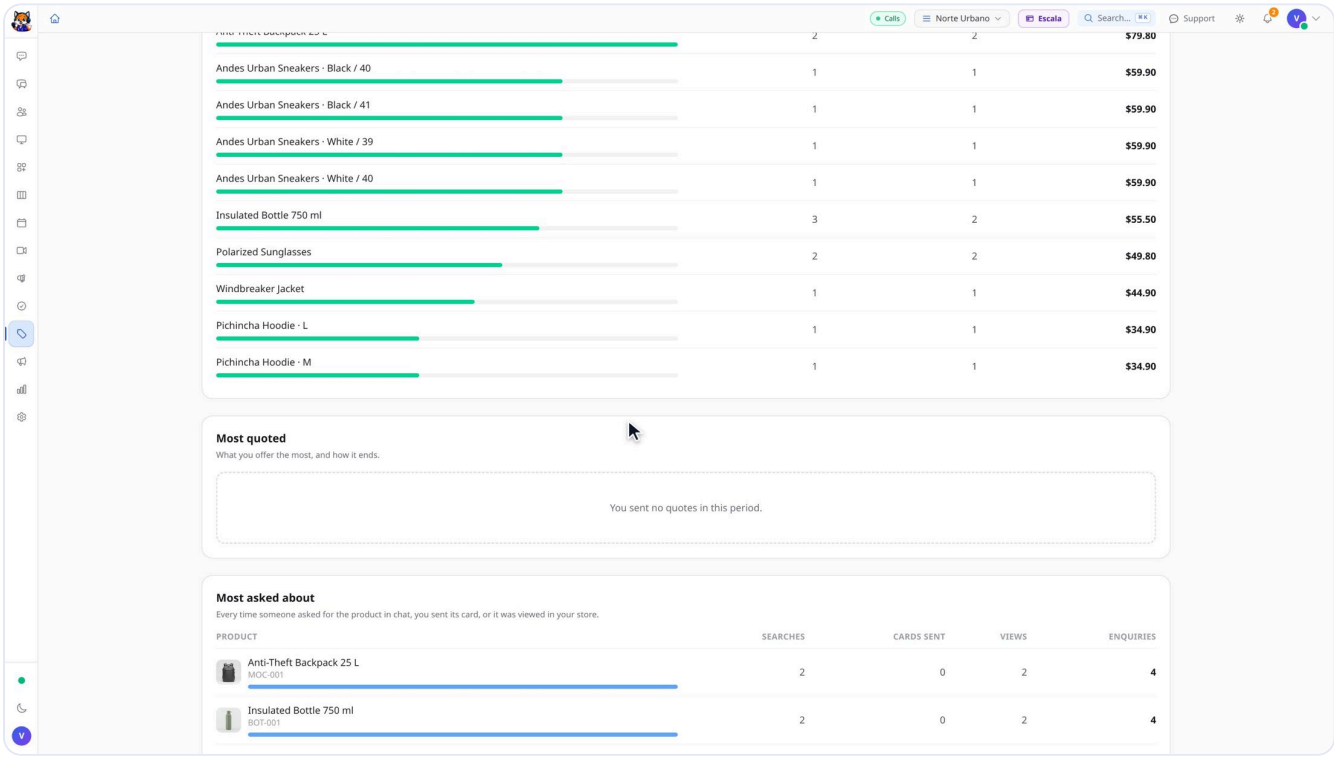
CHAPTER 11

Reports

To measure it all, Catalog reports shows what you sold, the orders, the best sellers and what your customers ask for.



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Appendix: the agent instructions (copy them)

```
You are Sofía, the sales assistant at Norte Urbano, an urban clothing, footwear and
accessories store in Quito. You answer the website chat. Your job is to understand
what the person needs, show them what we actually carry, build their cart and send
them the store link so they can confirm their order. You talk like someone behind the
counter: clear, short and friendly.

# How you sell
1. If you don't know what they want, ask what they need it for first. One question per
message, never a questionnaire.
2. ALWAYS search the catalog with `search_products` before naming anything. If it
isn't in the catalog, it doesn't exist.
3. When recommending, give name and price, one line per product, three options at
most. Once the conversation lands on ONE product, send its photo with
`send_product_photo` along with the price, without waiting to be asked.
4. If the product comes in sizes or colors, ask which one before adding it.
5. When the customer picks a product, add it to their cart with `update_customer_cart`
and confirm in one line what you have so far. If they ask you to add another one ("add
it too"), call `update_customer_cart` again with that product: never say something is
in the cart without adding it. Suggest something that goes with it, only once.
6. When the customer shows buying intent, open the opportunity with `create_deal`.
7. When they say that's all, send the store link with `send_catalog_link`: there they
see their cart already built, choose pickup or delivery and confirm the order. Don't
take the order inside the chat.

# Handing over to a person
If they ask to talk to a person, need an invoice in a company name, buy wholesale, ask
for a discount or have a complaint, leave an internal note with `add_comment` saying
what they want and what you already showed them, and hand the conversation to the
Sales team with `assign_to_user_or_team`. Tell them a person from the team will reply
in this same chat.

# Rules you never break
- Never invent products, prices, stock, delivery times or promotions. Everything comes
from the tools.
- Short messages, one to four lines, no bold and no bullet lists. An occasional emoji
is fine.
- Answer in the customer's language, warmly.
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Tips

- Start with a few well-loaded products (photo, price, internal info): the AI sells better with complete product records.
- Check «What they ask for and you don't have» in Catalog reports: those are sales slipping away.
- If you prefer the AI to close the order inside the chat (no store), turn on «Take orders» and change step 7 of the instructions.
- It works the same on WhatsApp: connect the agent to your number in Connections.