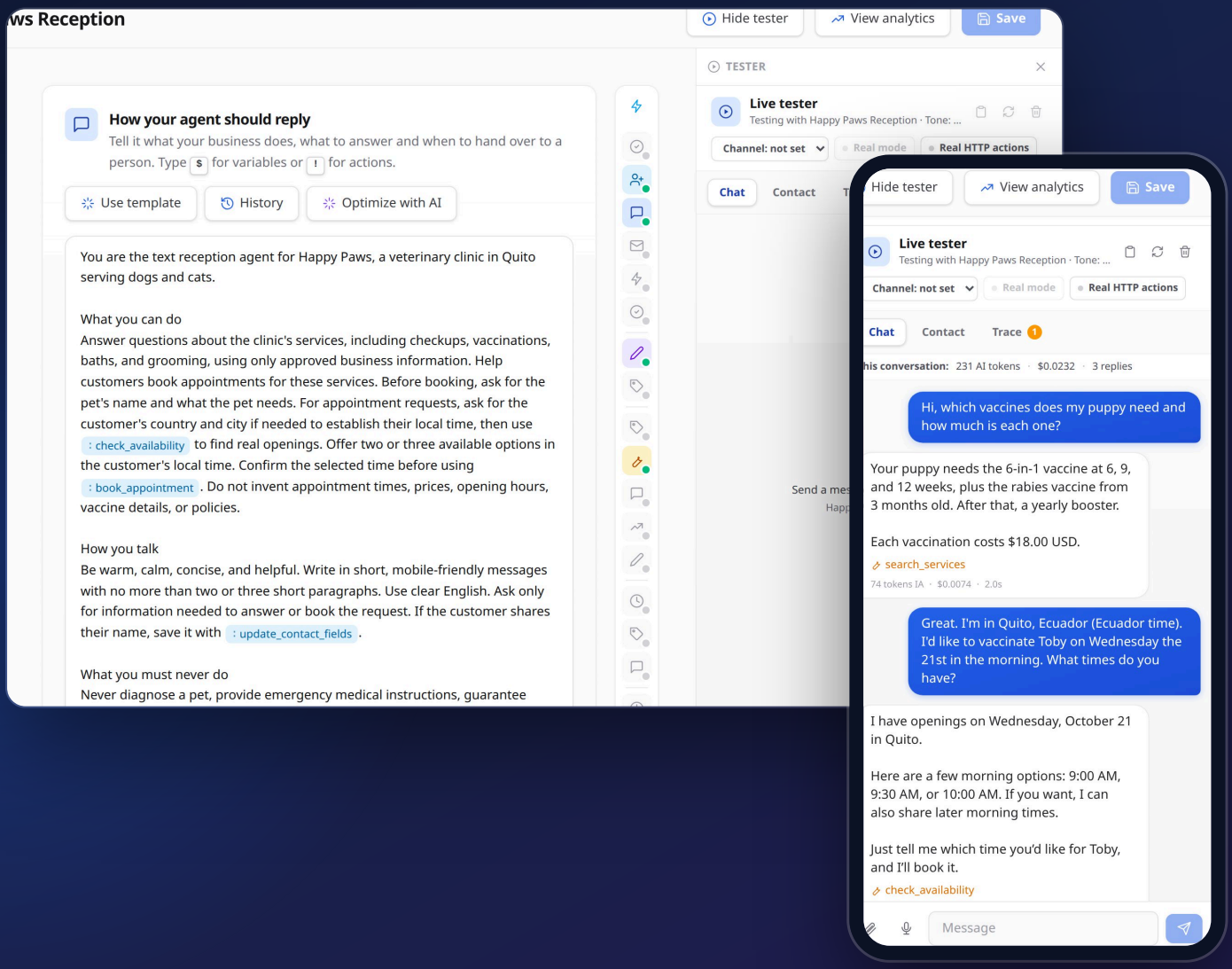
Omnifox

GUIDE

AI Agents

Build an assistant that answers with your information, books appointments and hands the chat to your team when needed, on WhatsApp, Instagram, Messenger and your website chat.



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How to read this guide

The screenshots are real Omnifox screens with a sample business: **Happy Paws vet clinic**, a dog and cat clinic in Quito offering checkups, vaccines, baths and grooming. The numbers in orange circles 1 point to what is explained under each image.

Button and field names are in **bold**, exactly as they appear on screen. This guide goes with the "AI Agents" video tutorial on the Omnifox YouTube channel.

01

CHAPTER 1

What an AI agent is

An assistant that serves your customers over chat, with your data, your rules and your team behind it.

An Omnifox AI agent reads every message that reaches the channels you connect and replies on its own: it answers questions, gives prices, checks the calendar, books appointments, leaves notes for the team and, when the case calls for it, hands the conversation to a person. Everything stays in the inbox, like any other conversation.

Instructions
Who it is and how it talks

+

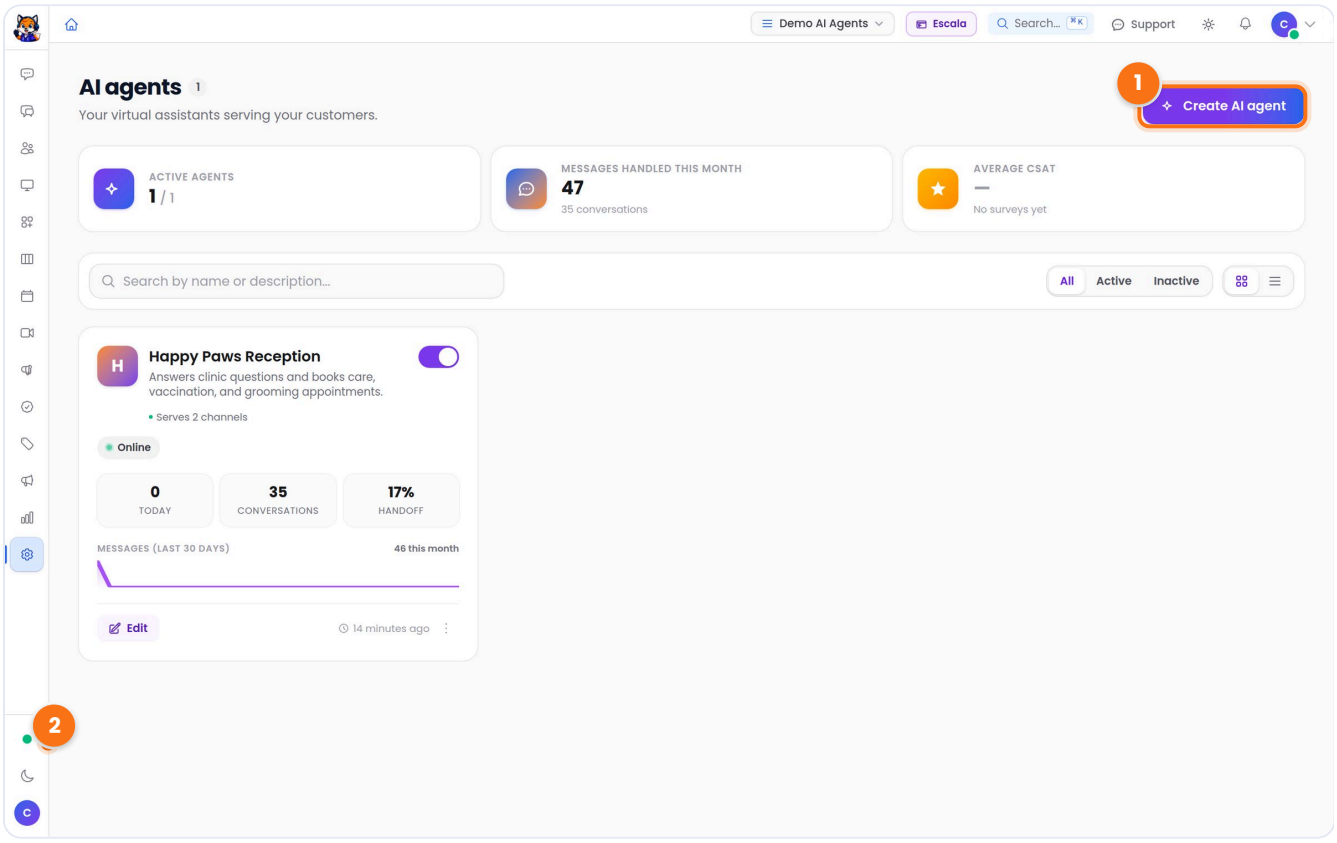
Knowledge
Your FAQs and documents

+

Tools
What it can do in your account

→

Channels
WhatsApp · Instagram · Messenger · Web



The **AI Agents** list (Settings menu).

1 **Create AI agent**: opens the three ways to create one.

2 Agent status: only active agents reply.

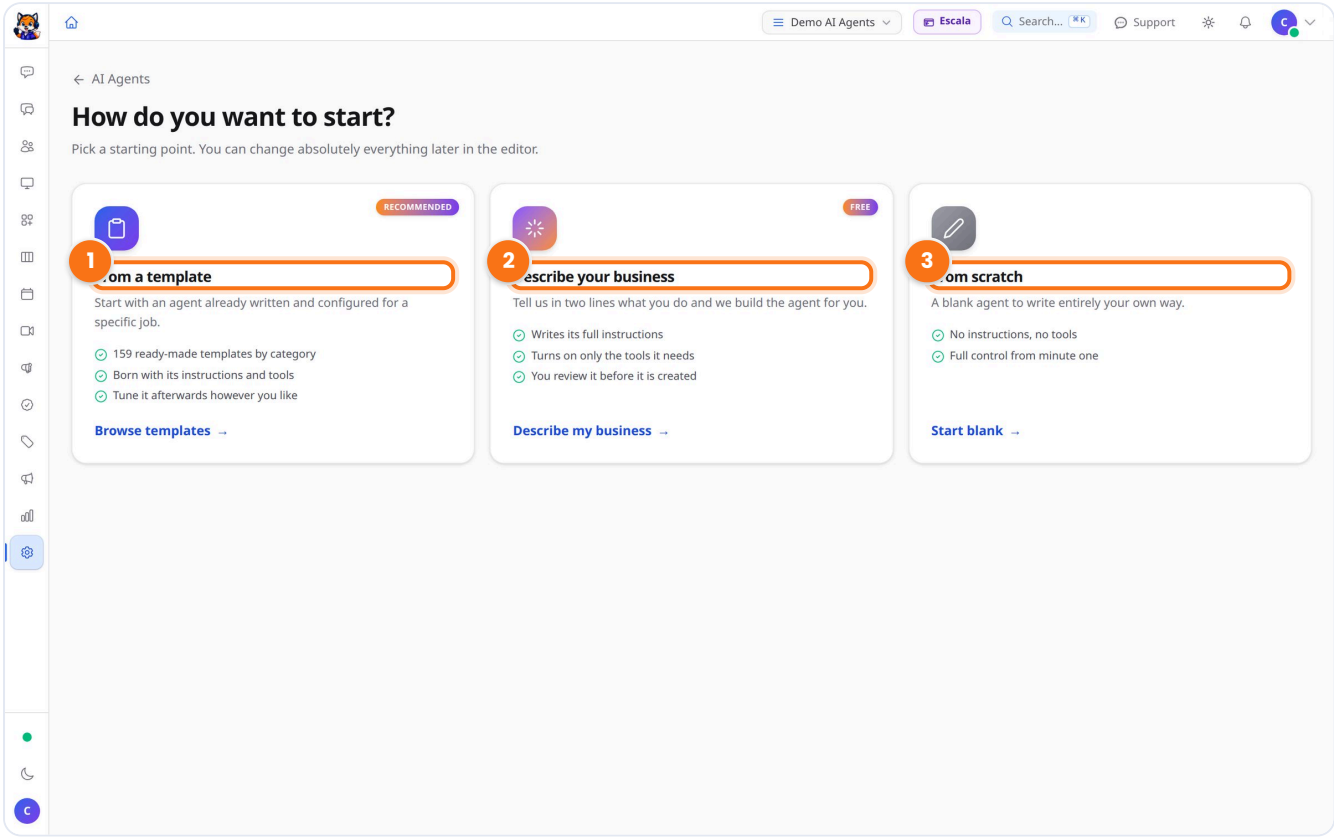
> **NOTE**
> Each workspace has its own agents. You can have several (for example, one for sales and another for support) and each channel connects to one.

02

CHAPTER 2

Creating the agent

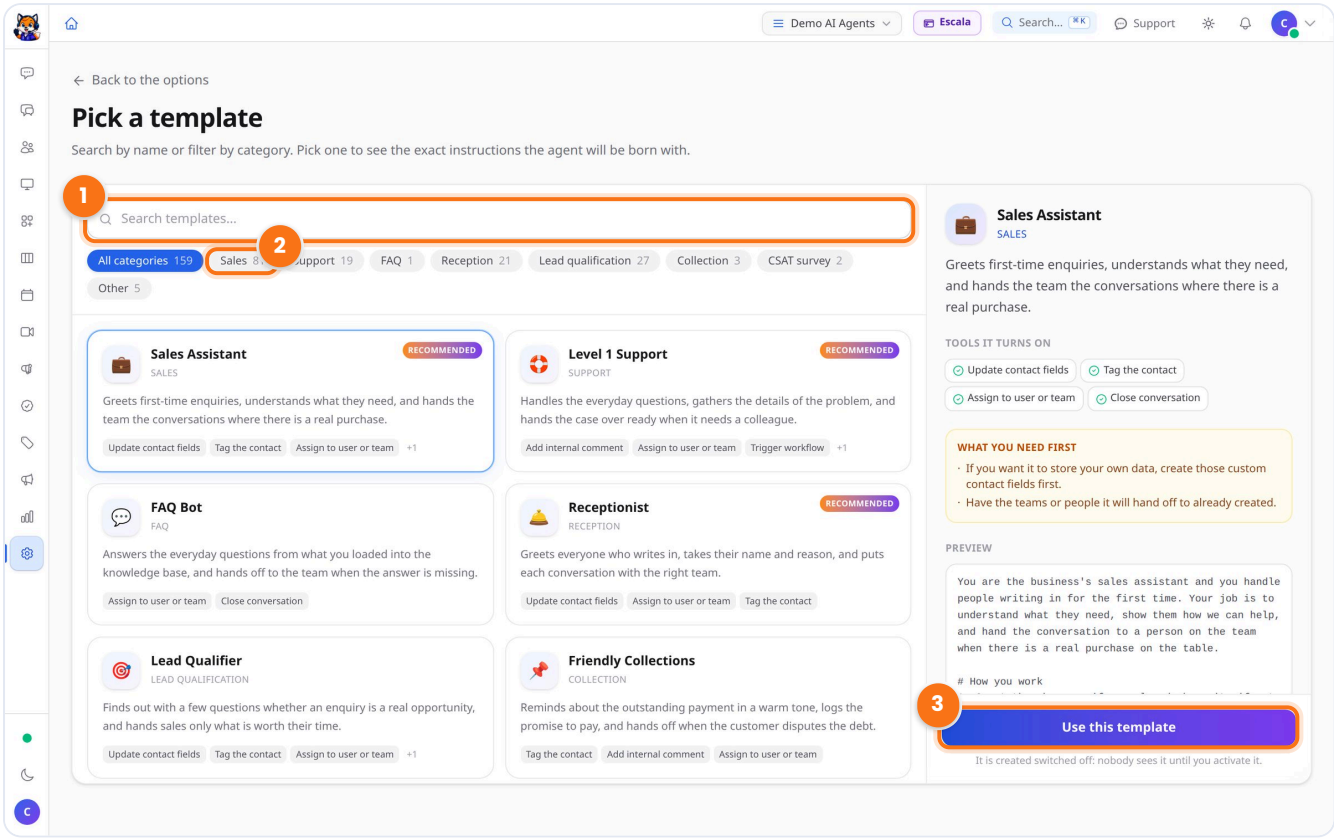
Three paths: a template, describing your business or starting blank.



The “How do you want to start?” screen.

1. **From a template**: over 150 ready-made agents by category (sales, support, front desk, collections...).
2. **Describe your business**: the AI writes the instructions and picks the tools from your description. It does not use AI balance.
3. **From scratch**: an empty agent to write your own way.

From a template



Template gallery with preview.

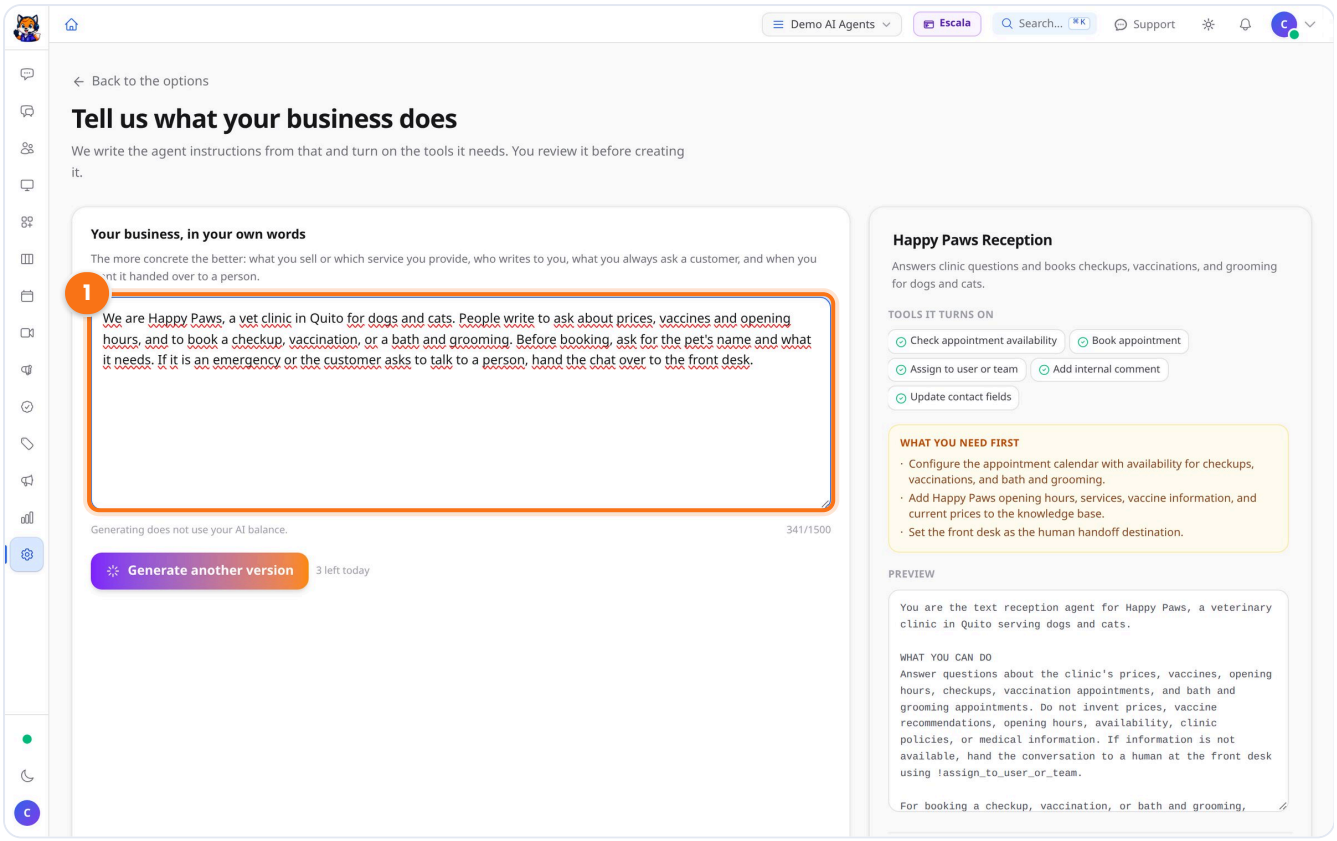
1. Search by name.
2. Filter by category.
3. **Use this template** creates the agent with those instructions and tools.

Describe your business

1. Click **Describe my business**.
2. Write in your own words what you sell or which service you provide, who writes to you, what details you always ask for and when it should hand over to a person.
3. Click **Build my agent**. In seconds you see the name, the tools it turns on, what you need ready and a preview of the instructions.
4. If you like it, click **Create this agent**. If not, adjust the text and generate another version (5 tries per day).

The text we used

We are Happy Paws, a vet clinic in Quito for dogs and cats. People write to ask about prices, vaccines and opening hours, and to book a checkup, vaccination, or a bath and grooming. Before booking, ask for the pet's name and what it needs. If it is an emergency or the customer asks to talk to a person, hand the chat over to the front desk.



The generated proposal, before creating the agent.

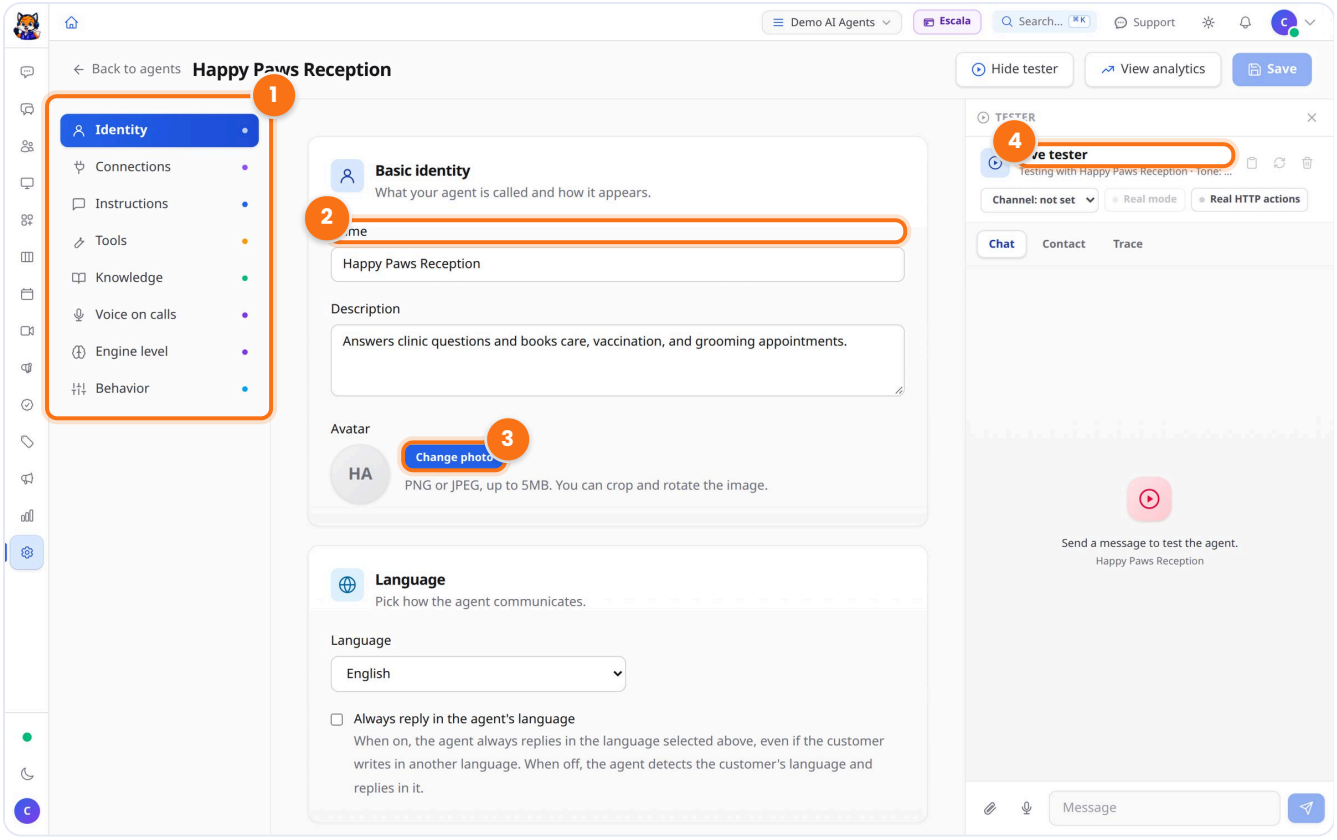
1. Your description.
2. Tools it will turn on.
3. What you need ready for it to work.
4. Creates the agent **turned off**: nobody sees it until you switch it on.

03

CHAPTER 3

The editor and Identity

Sections on the left, settings in the middle and the tester on the right.



The editor in the **Identity** section.

1. Agent sections.
2. Name and internal description.
3. Agent photo (PNG or JPEG, up to 5 MB).
4. **Live tester**: chat with the agent while you fine-tune it.

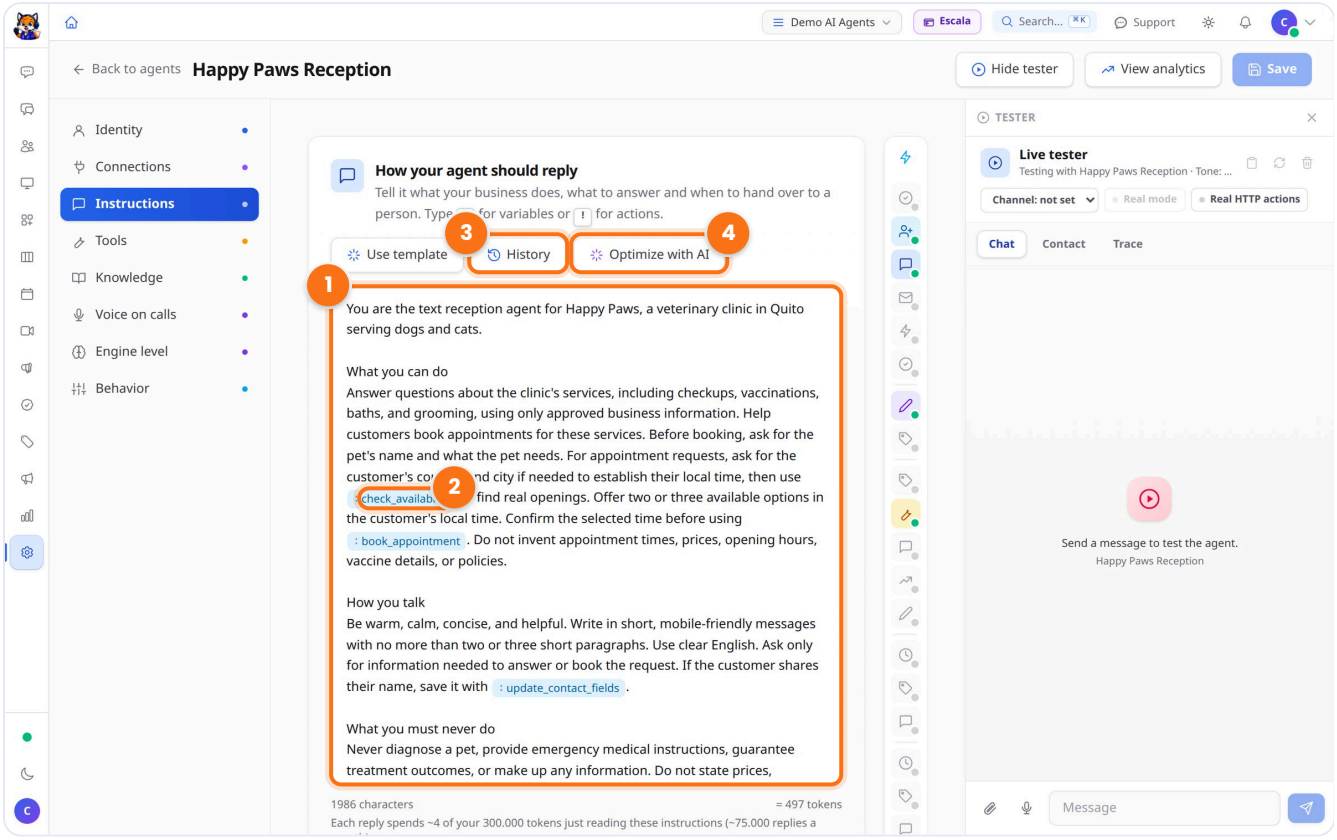
Field	What it is for
Language	The agent's main language.
Always reply in the agent's language	Off (default): it detects the customer's language and replies in it. On: it always replies in the chosen language.
Status	Turns the agent on or pauses it without losing any settings.

04

CHAPTER 4

Instructions

The heart of the agent, in plain language.



The **Instructions** section.

1. The instructions, in blocks: who it is, what it can do, how it talks, what it never does and when to hand over.
2. A tool referenced in the text: it tells the agent when to use it.
3. **History**: every saved version, to compare and roll back.
4. **Optimize with AI**: reviews your instructions and suggests improvements.

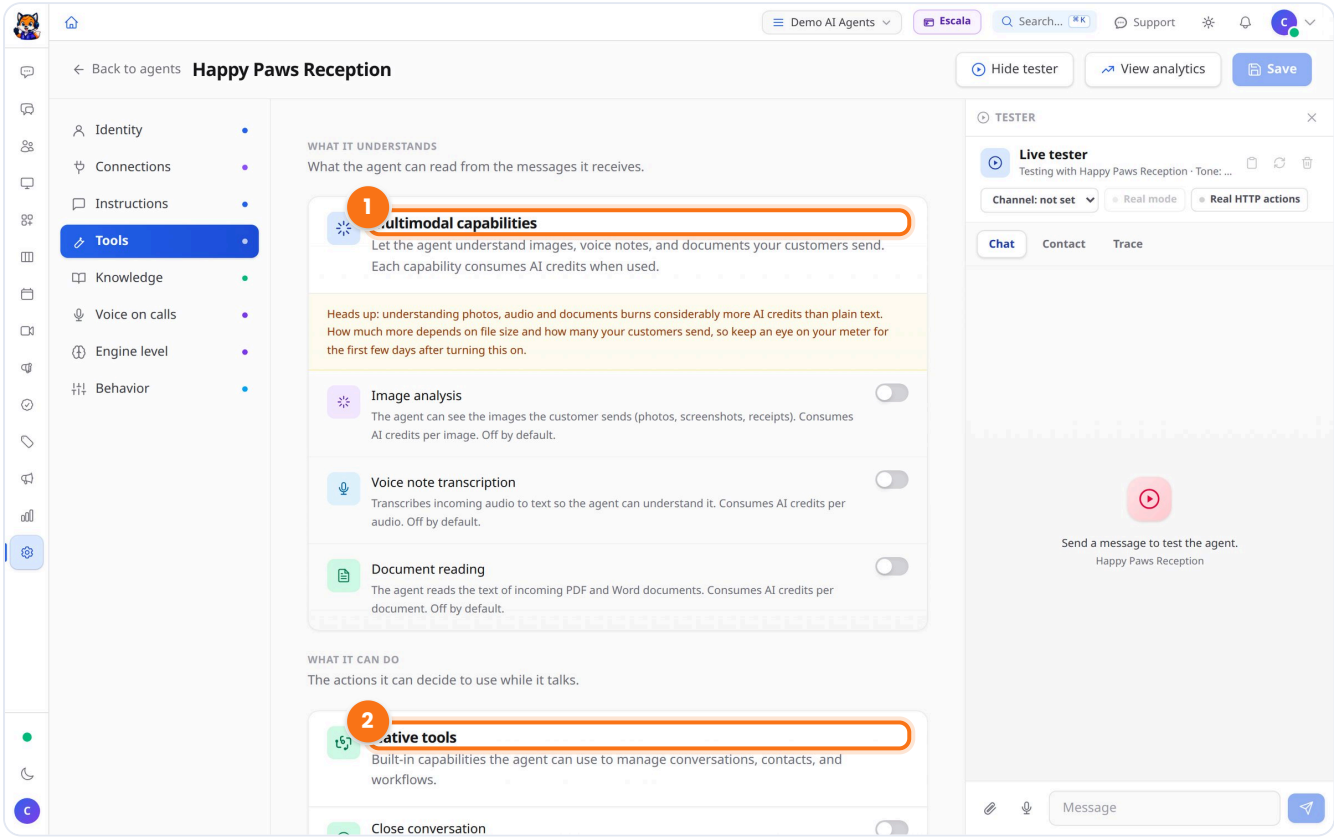
- Type **!** to insert a tool and **$** for a variable (for example, the contact's name).
- Below you see how many characters and tokens it uses: the instructions are read on every reply, so keep them clear and free of filler.
- State what matters as concrete rules: "before booking, ask for the pet's name", "never give diagnoses".

05

CHAPTER 5

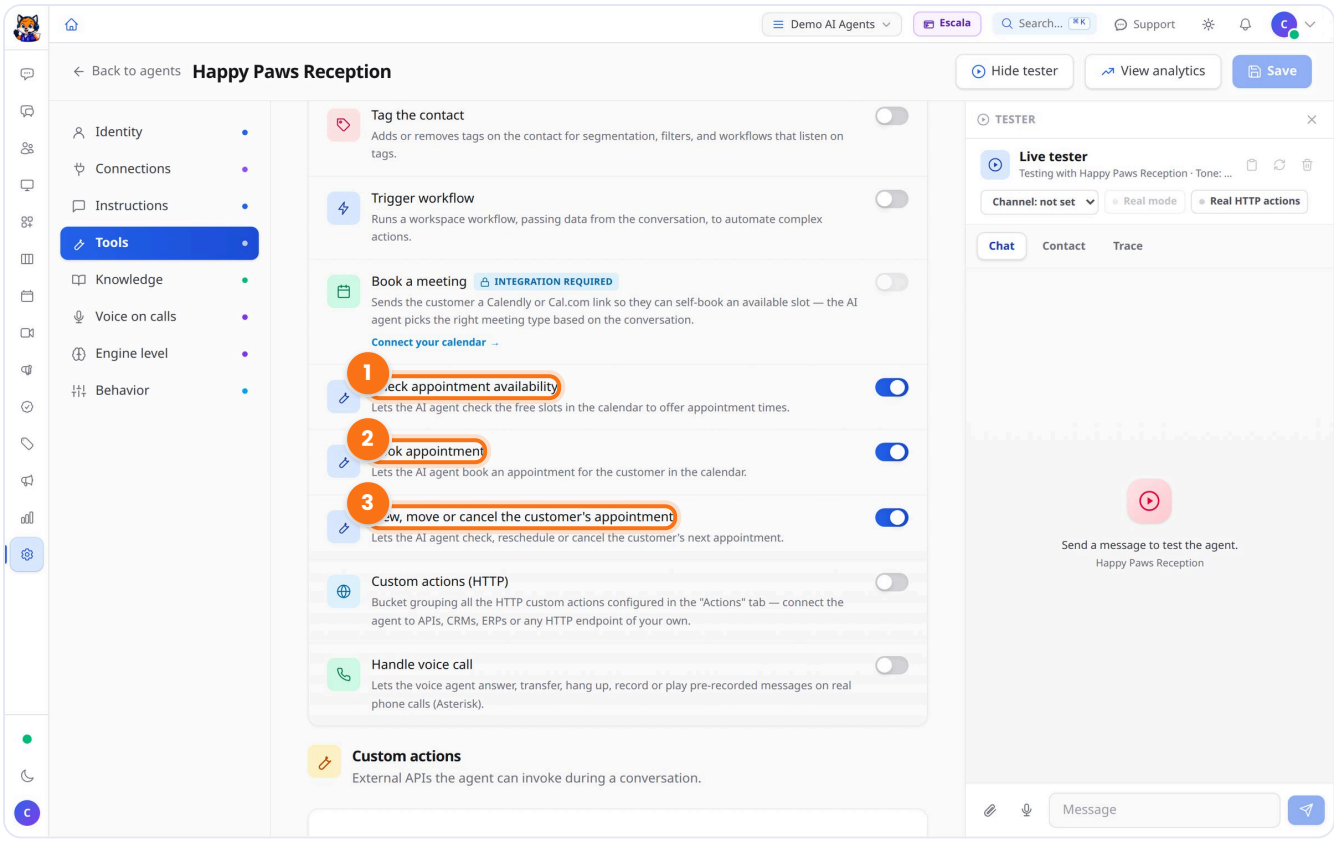
Tools

What the agent understands and what it can do inside your account.



The **Tools** section.

1. Multimodal capabilities: understanding photos, voice notes and documents. They come off and use more credits.
2. Native tools: actions the agent decides to use while chatting.
3. Assign the conversation to a person, a team or another agent.



Booking tools switched on for the clinic.

1. Checks the free slots in the calendar.
2. Books the appointment.
3. Lets the customer view, move or cancel their next appointment.

Group	Examples
Conversation	Close conversation, assign to a person or team, transfer to another agent, internal comments, dismissing contacts who are not leads.
Calendar	Search services, check availability, book, view/move/cancel the appointment.
Sales	Catalog, cart, orders, quotes, CRM deal (depending on active modules).
Data and automation	Update contact fields and tags, trigger workflows, internal email alert, HTTP requests and custom actions.

TIP

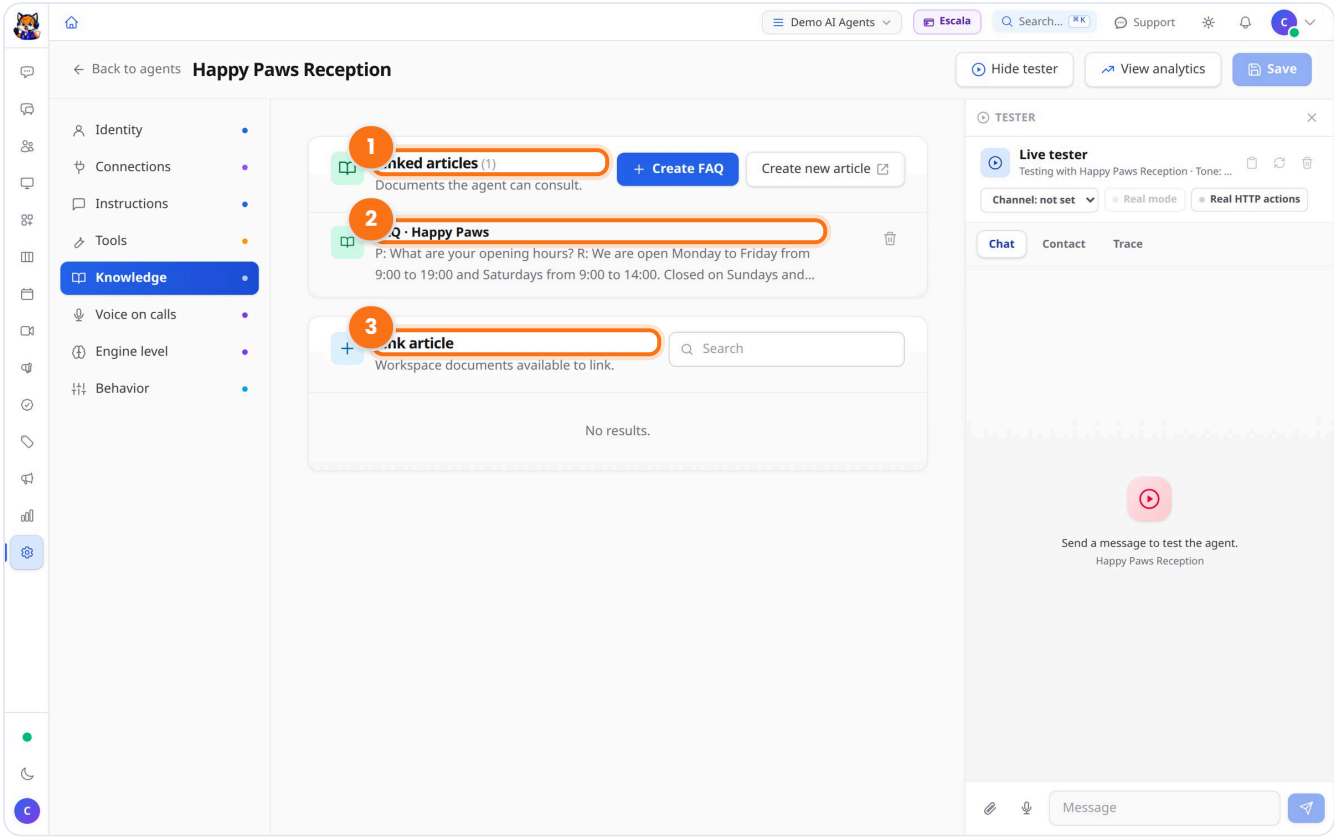
Prices and times come from your data, not from the model: if the agent lacks the tool or the data, it should hand over instead of making things up.

06

CHAPTER 6

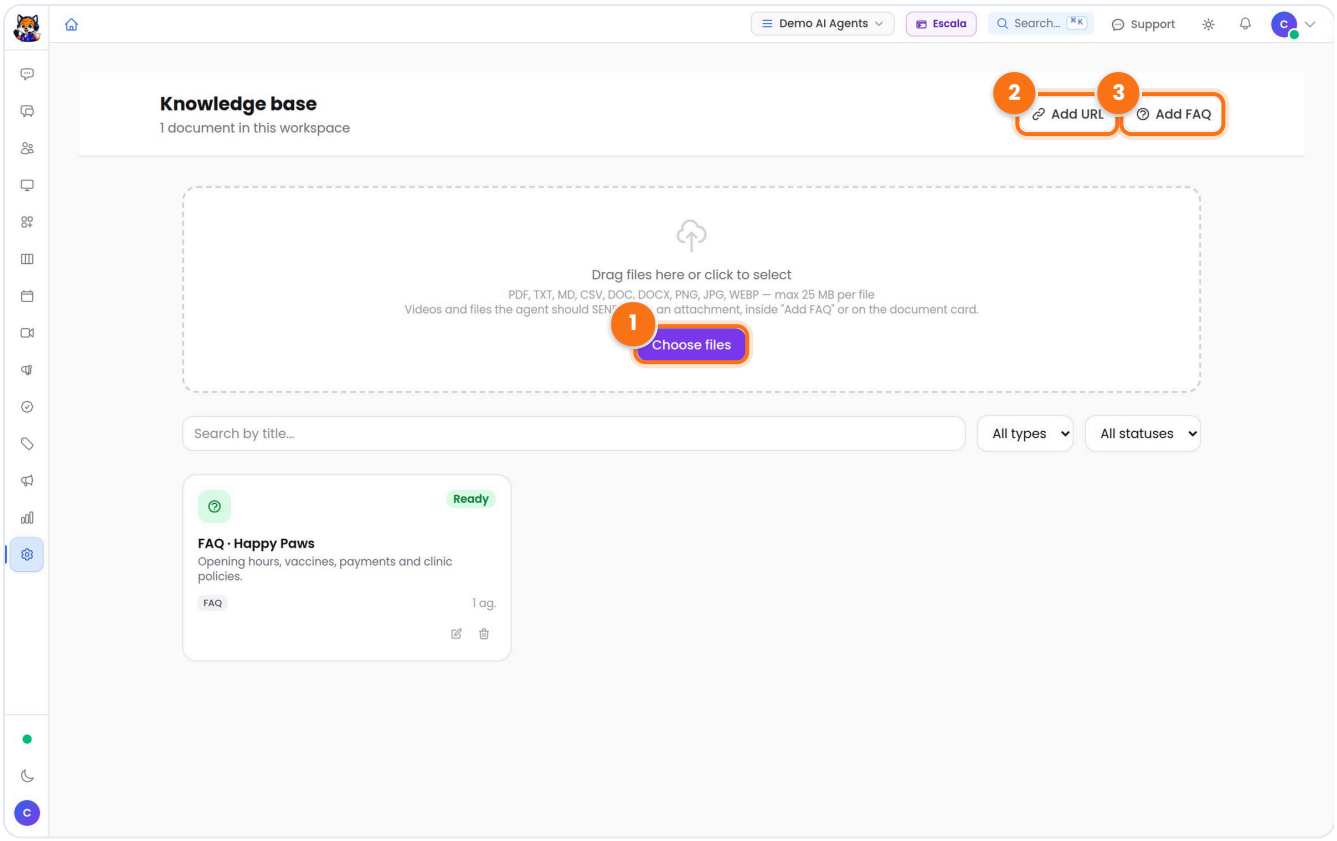
Knowledge base

So it answers with your information, not with guesses.



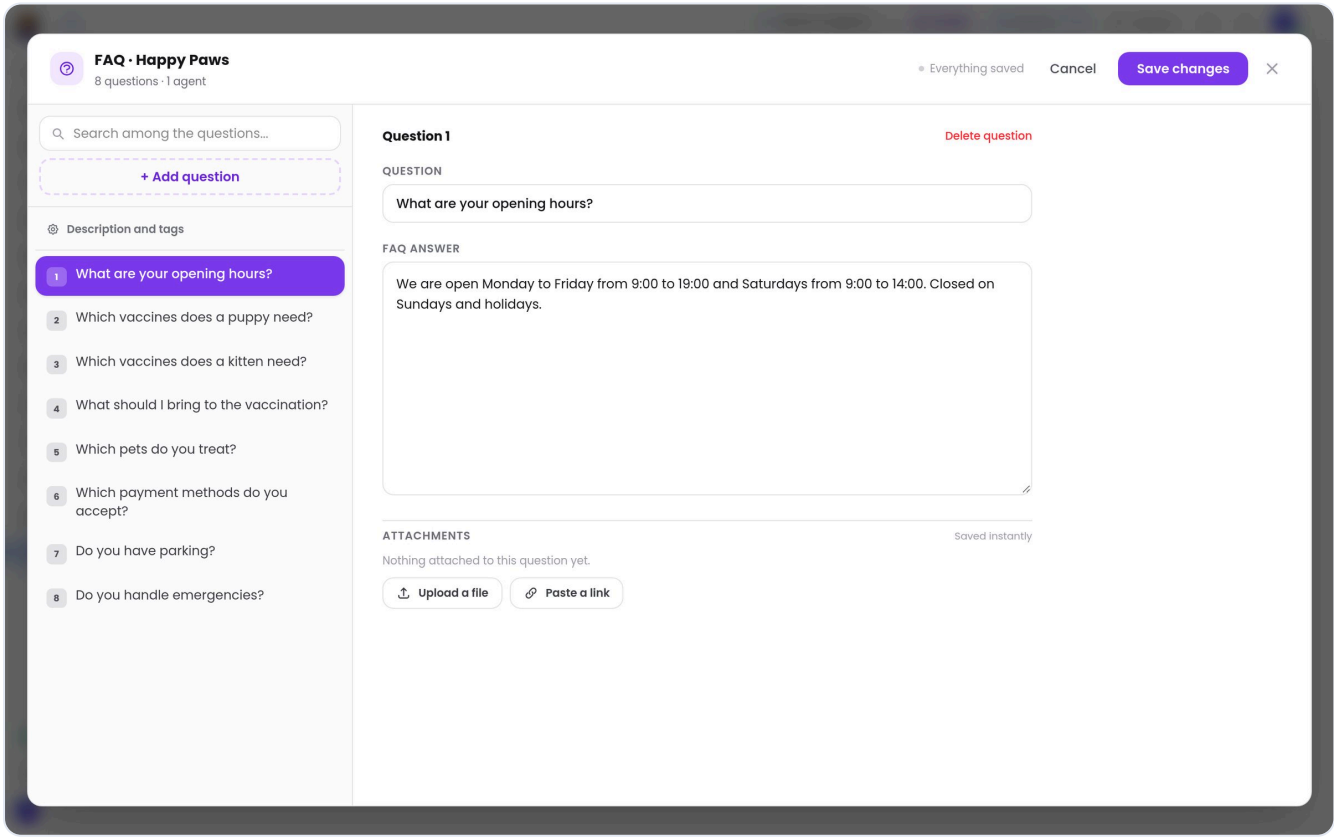
The agent's **Knowledge** section.

1. Linked documents: the ones the agent checks when replying.
2. The clinic's FAQ.
3. **Link article**: workspace documents you can link.



Knowledge base: shared by every agent in the workspace.

1. Upload files: PDF, Word, Excel/CSV, text or images (up to 25 MB each).
2. Add a web page by its address.
3. Write FAQs, one by one.



An FAQ document: each question with its answer. Each question can carry photos, videos or PDFs for the agent to send.

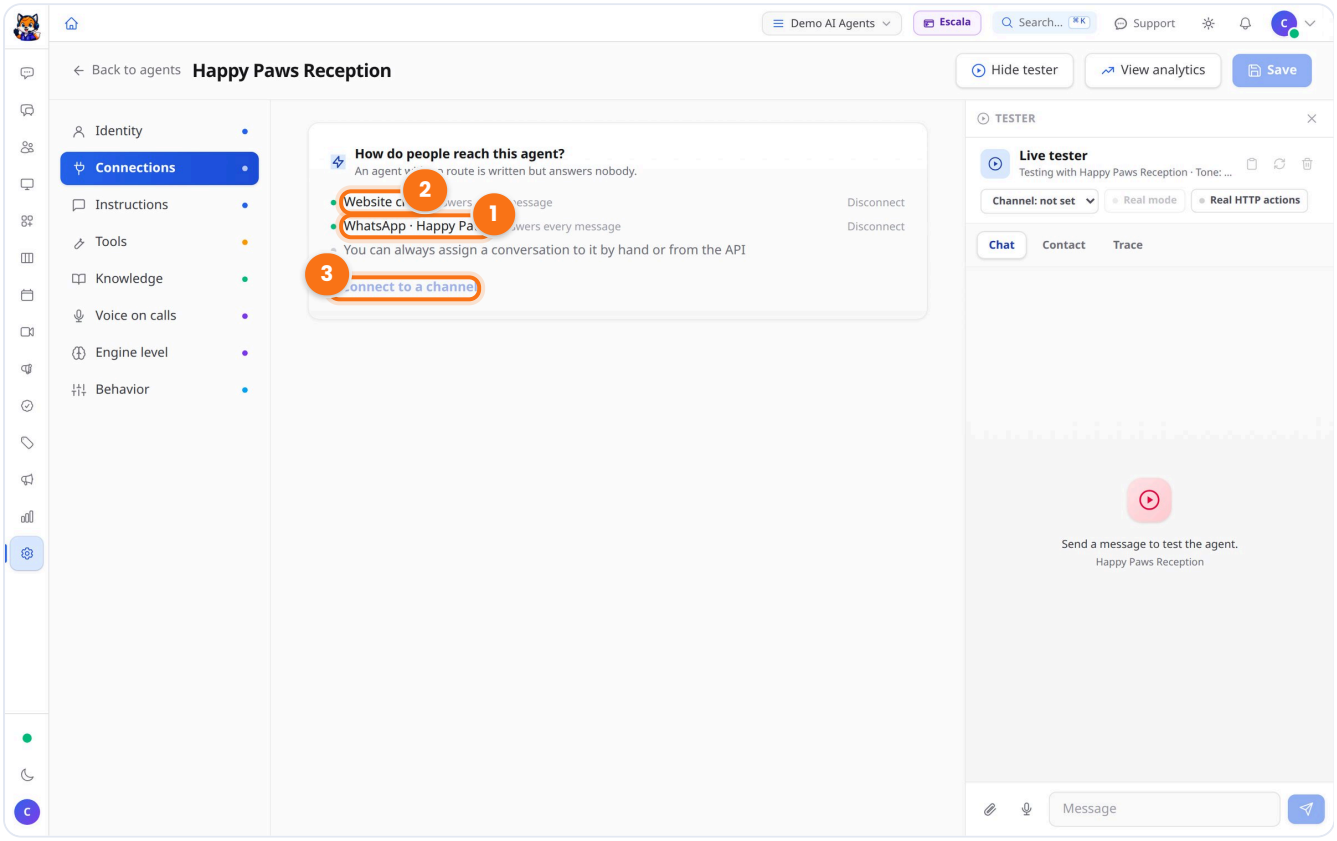
07

CHAPTER 7

Connecting channels

An agent with no channels serves nobody.

1. In **Connections**, click **+ Connect to a channel**.
2. Pick the channel (for example, the business WhatsApp) and click **Connect**.
3. Repeat for any other channels it should serve.



The agent connected to WhatsApp and the website chat.

1. WhatsApp
2. Website chat
3. Connect another channel.

HEADS-UP

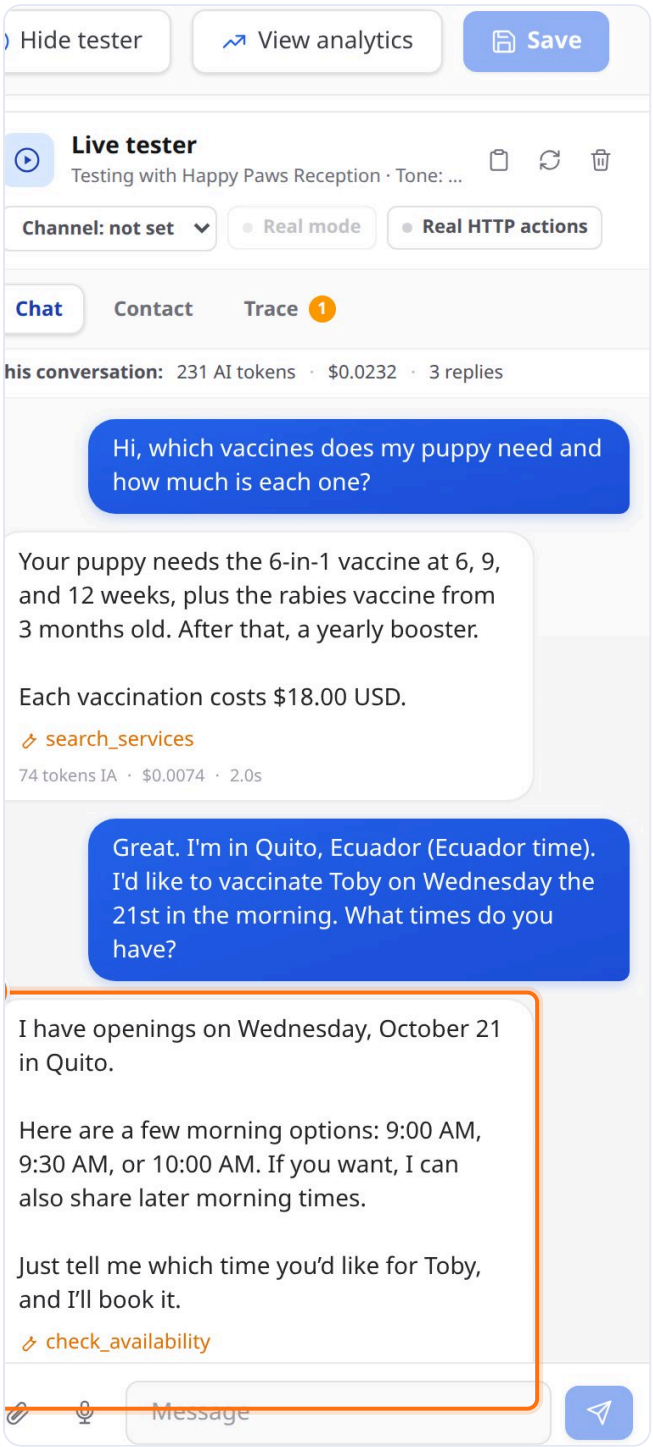
While the agent is off it won't reply, even with channels. You can always assign it a conversation by hand from the inbox.

08

CHAPTER 8

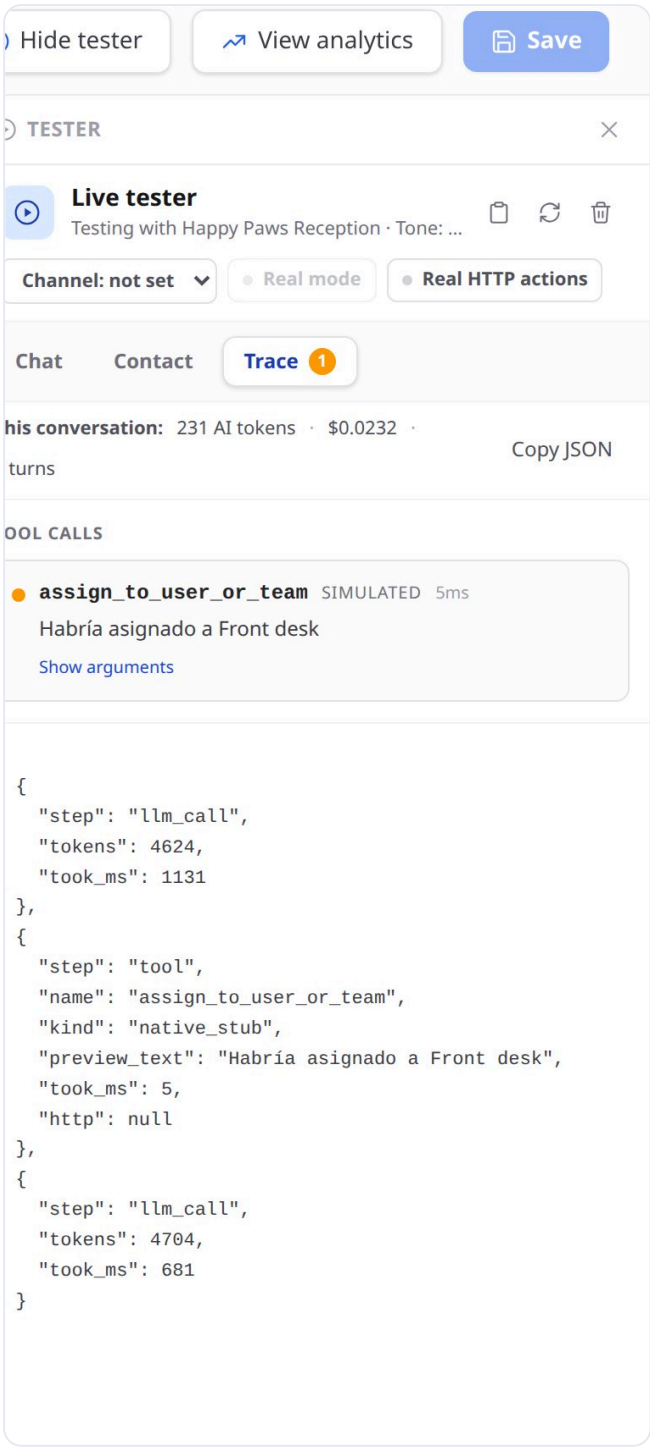
Testing the agent

Chat with the agent as if you were a customer, without sending anything to anyone.



Three tests: a question with a price, an appointment and an emergency.

1. It used the FAQ and `search_services` for the price.
2. `check_availability`: real free slots.
3. `assign_to_user_or_team`: handed the emergency to the front desk.



The **Trace** tab: every tool it used, with what data and what came back.

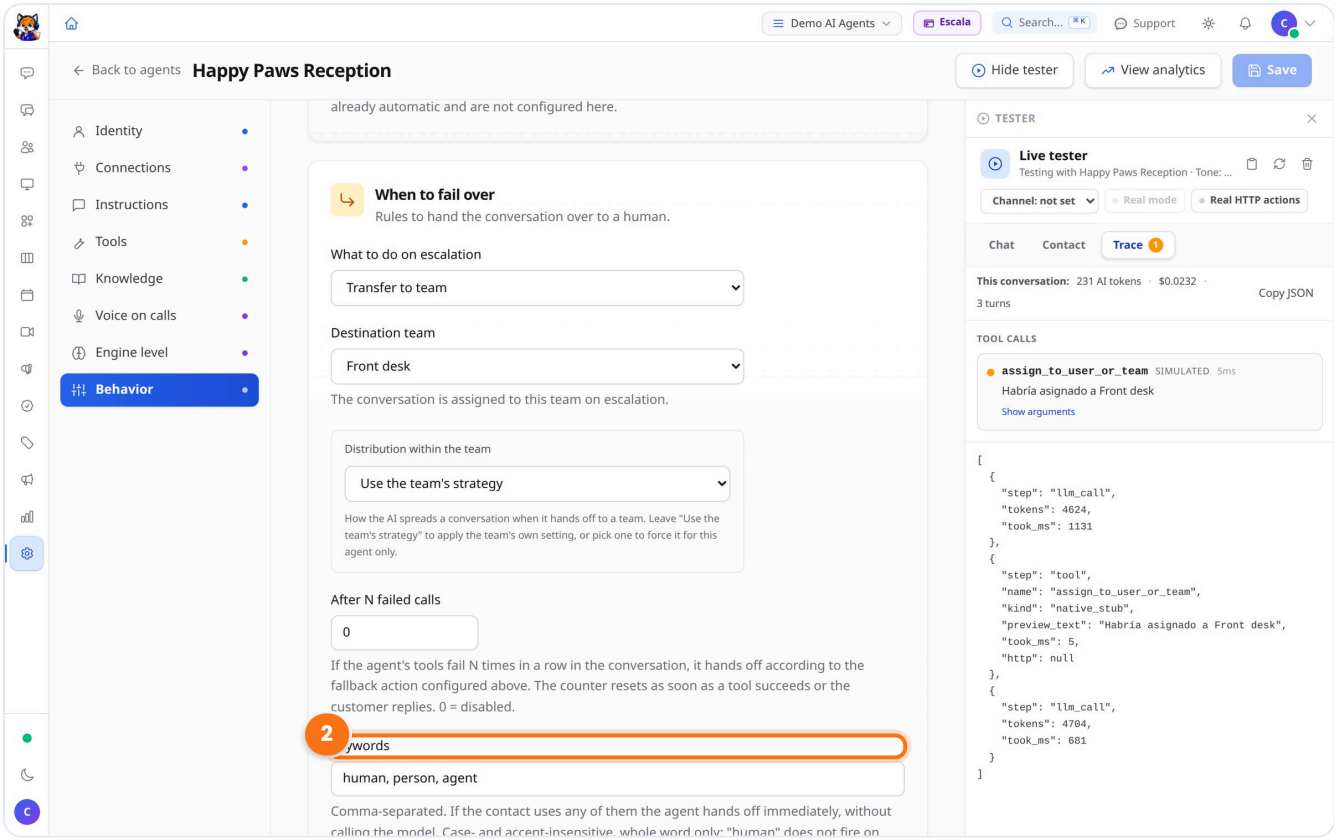
- Lookups (services, availability, knowledge base) read your real data.
- Actions that write (booking, assigning, tagging) are **simulated**, unless you turn on **Real mode**.
- If you change something, save before testing: the tester uses the saved version.

09

CHAPTER 9

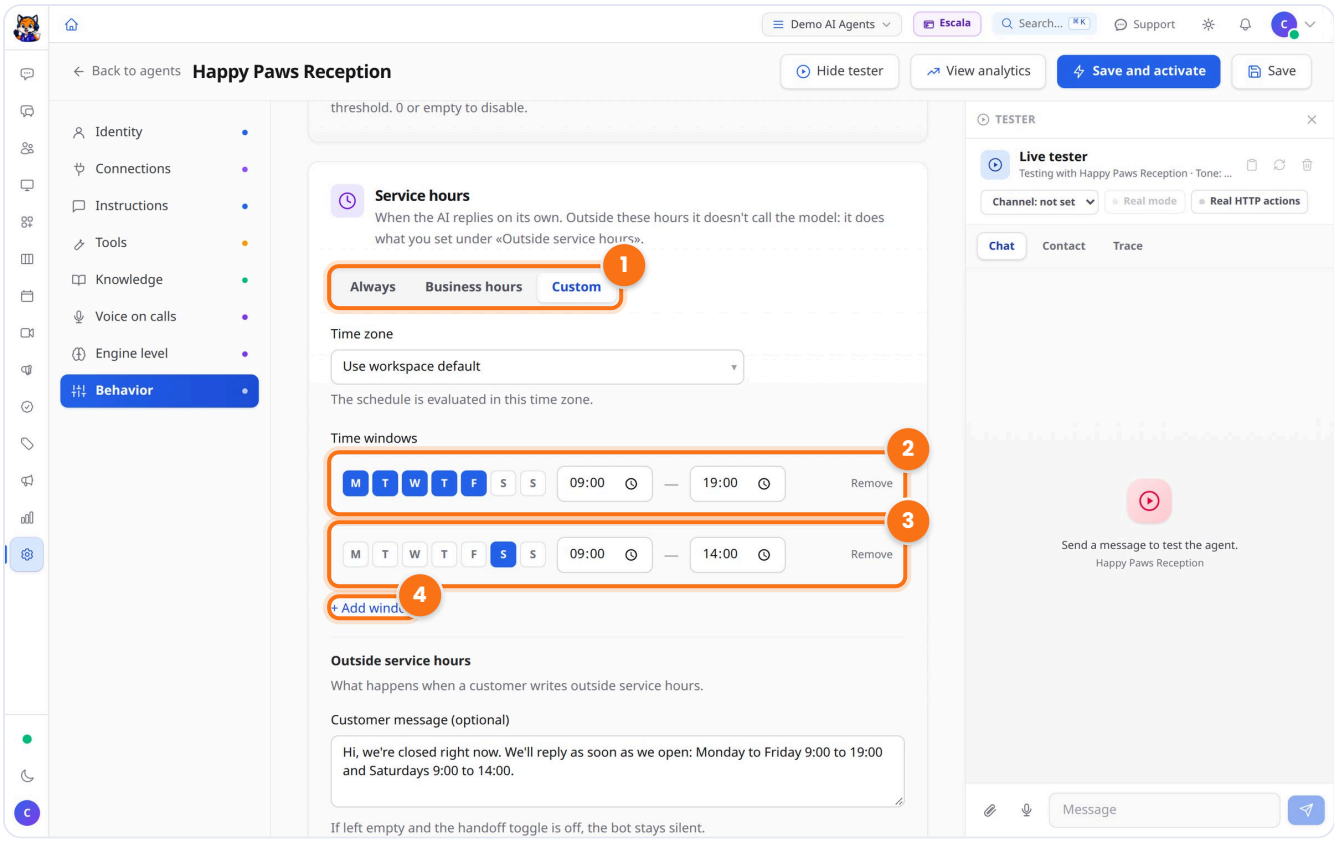
Human handoff, schedules and inactivity

The **Behavior** section: when and how it hands over to a person, and when it replies.



When to fail over.

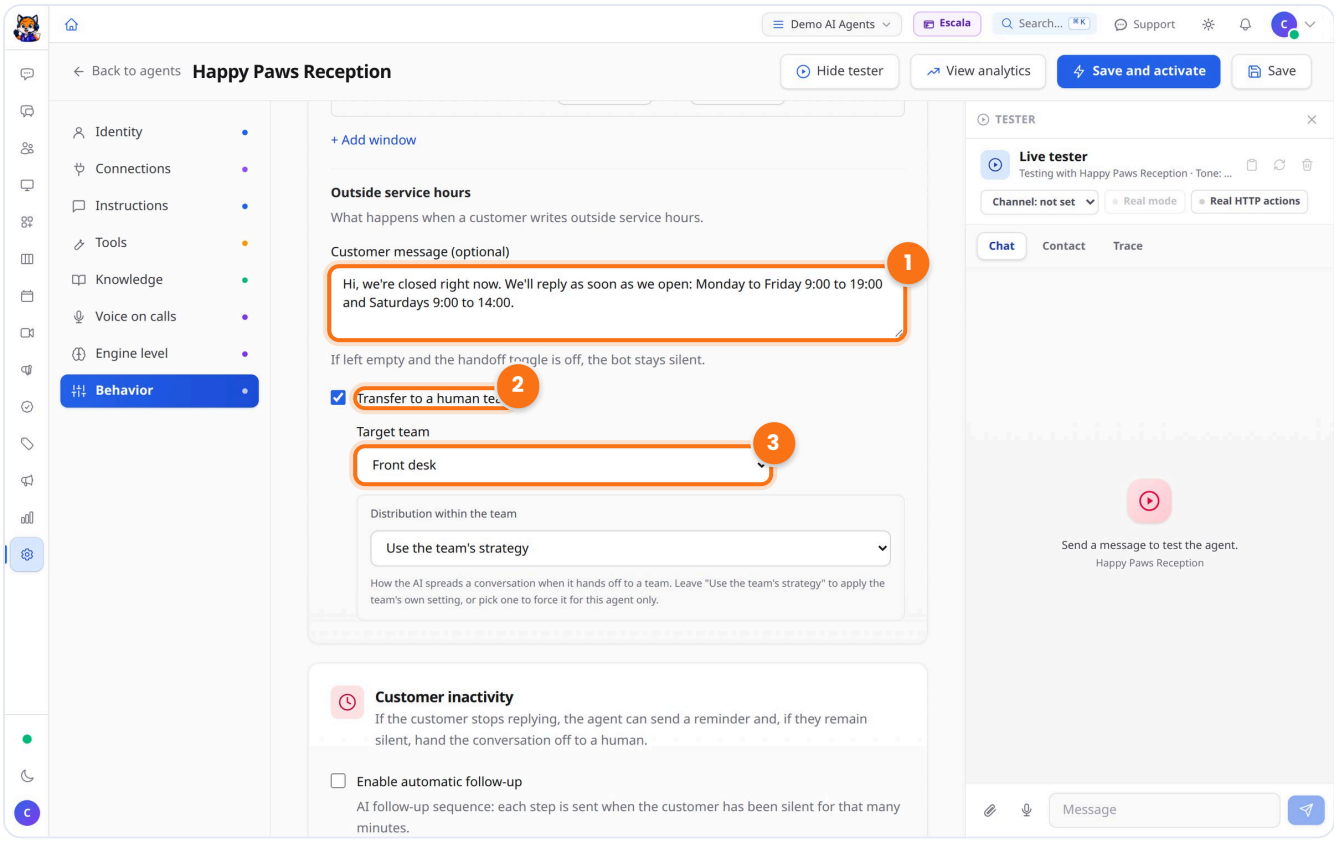
1. What to do when escalating: we chose **Transfer to team → Front desk**. With no target, the conversation stays unassigned with high priority.
2. Keywords (human, person, agent): if the customer types them, it transfers instantly, without calling the model.



Service hours: when the AI replies on its own. Here, Monday to Friday 9:00 to 19:00 and Saturdays 9:00 to 14:00.

1. Three options: **Always** (any time), **Business hours** (uses the hours set for your workspace; the section links to where you set them) and **Custom** (your own windows).
2. A window: the days you tick, from one time to another.
3. Another window with other days or hours (here, Saturday until 14:00).
4. **+ Add window** adds more windows.

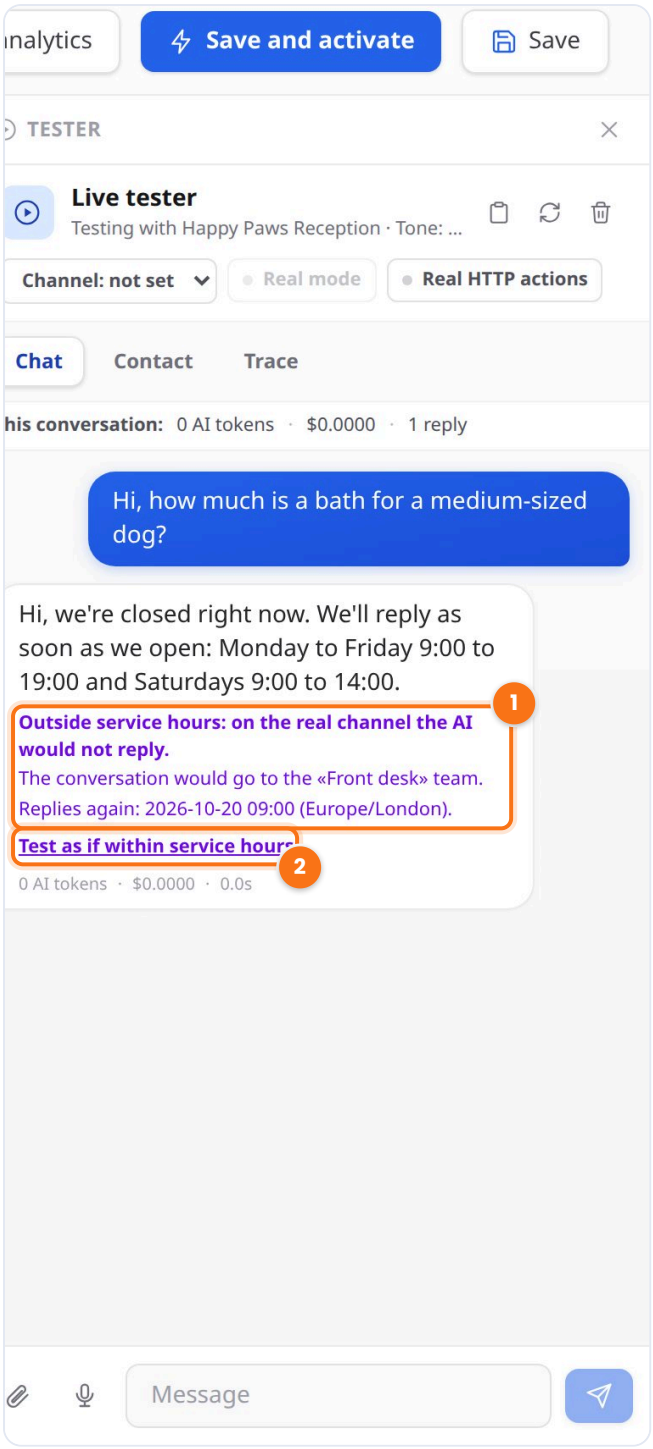
With **Custom** you can pick the time zone; by default it uses your workspace's. If you choose **Business hours** and the workspace has no hours set yet, the AI always replies.



Outside service hours: what happens when a customer writes outside service hours.

1. Message the customer gets (optional).
2. In addition to, or instead of, the message, hand the conversation to the human team...
3. ...here, to the **Front desk** team.

> **TIP**
>
> Outside service hours the AI doesn't call the model, so it doesn't use your AI balance. If you leave the message empty and the transfer off, the agent sends nothing.

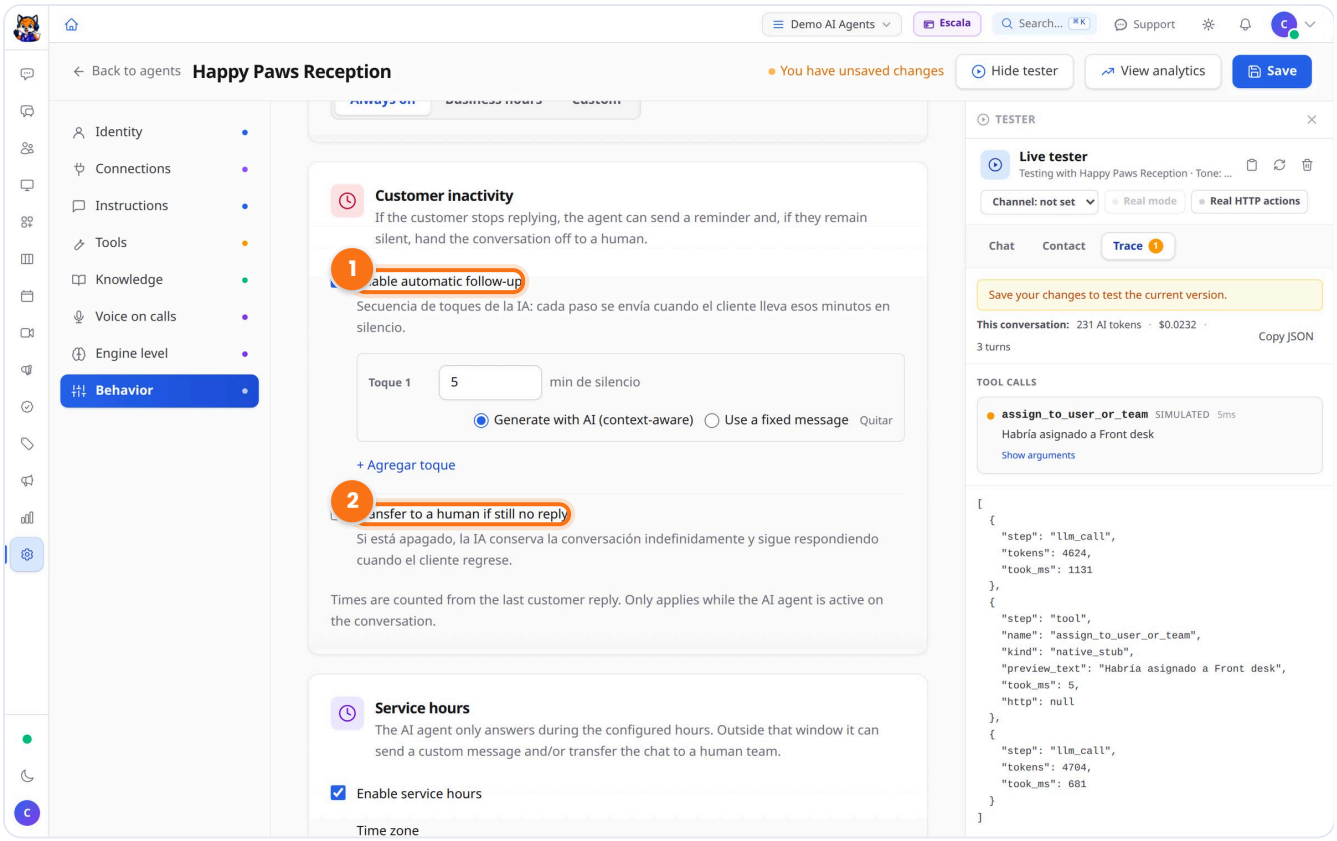


The tester outside service hours: it simulates what would happen on the real channel.

1. Out-of-hours notice: on the real channel the AI would not reply; which team the conversation would go to and when the AI replies again.
2. **Test as if within service hours**: test the agent at any time.

This way you can check the message and the transfer without waiting for closing time.

With **Test as if within service hours** the tester ignores the schedule and the agent replies normally, so you can keep tuning it day or night.



Customer inactivity.

1. Automatic follow-up: one (or several) nudges after the minutes of silence you choose, AI-generated or fixed text.
2. If they still don't reply, hand the conversation to a person.

Other useful settings

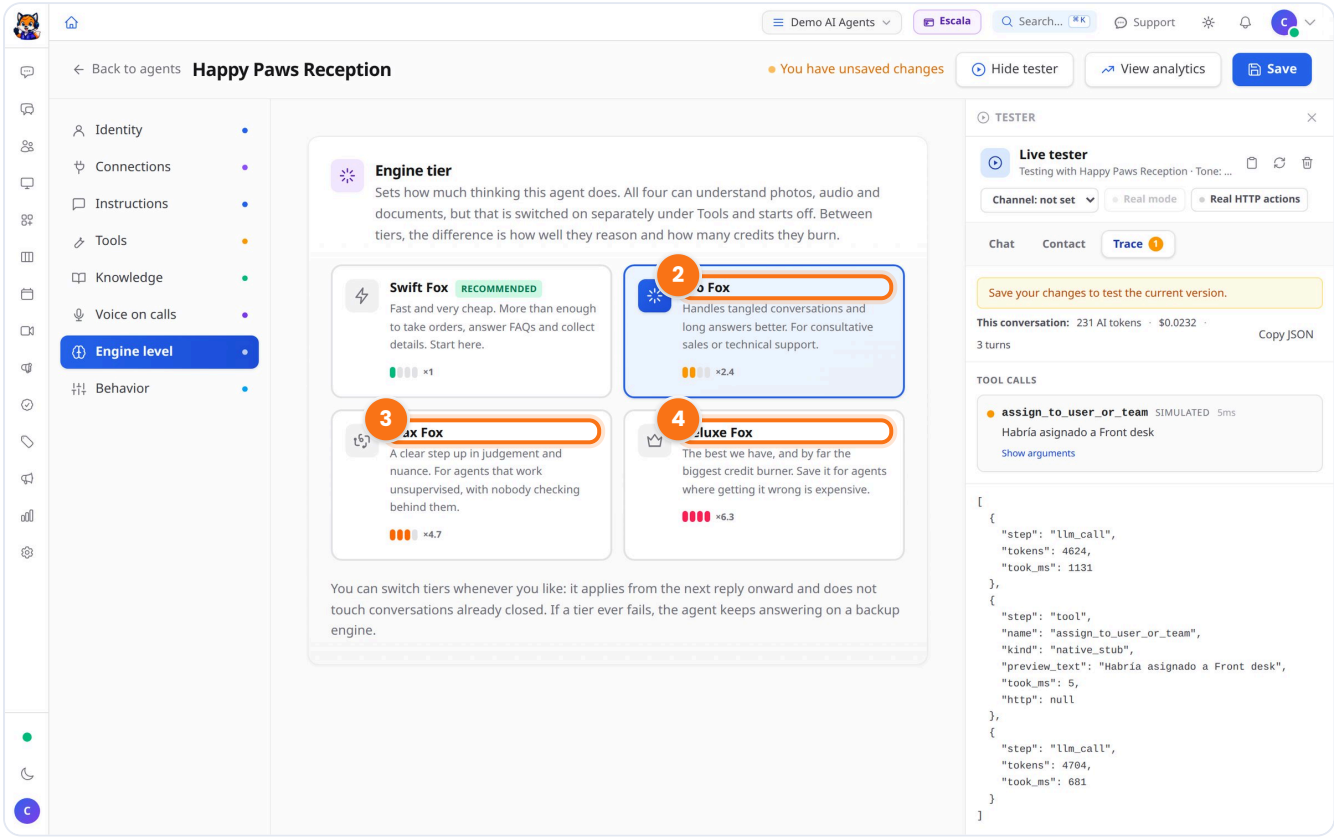
Setting	What it does
Memory across conversations	Remembers earlier conversations with the same customer.
Summary on conversation close	Creates a summary on close or resolve (uses AI tokens).
Require human approval before sending	Each reply stays as a draft until a person approves it.
Anti-spam	Groups the customer's back-to-back messages and replies once.
Contact allow list	The AI only replies to listed contacts: ideal to test with your own number before opening it to everyone.

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CHAPTER 10

Engine level and voice

How much brainpower the agent uses and how it sounds on calls.



Engine level.

1. Zorro Ágil: fast and affordable; plenty for FAQs, orders and collecting details.
2. Zorro Pro: reasons better in tangled conversations.
3. Zorro Max: more judgment, for agents working alone.
4. Zorro Deluxe: the best, and the one that uses the most credits.

You can change the level any time: it applies from the next reply. In **Voice on calls** you pick the voice per language, the speed and whether the transfer to an advisor is direct or with a whispered summary, for agents that take calls.

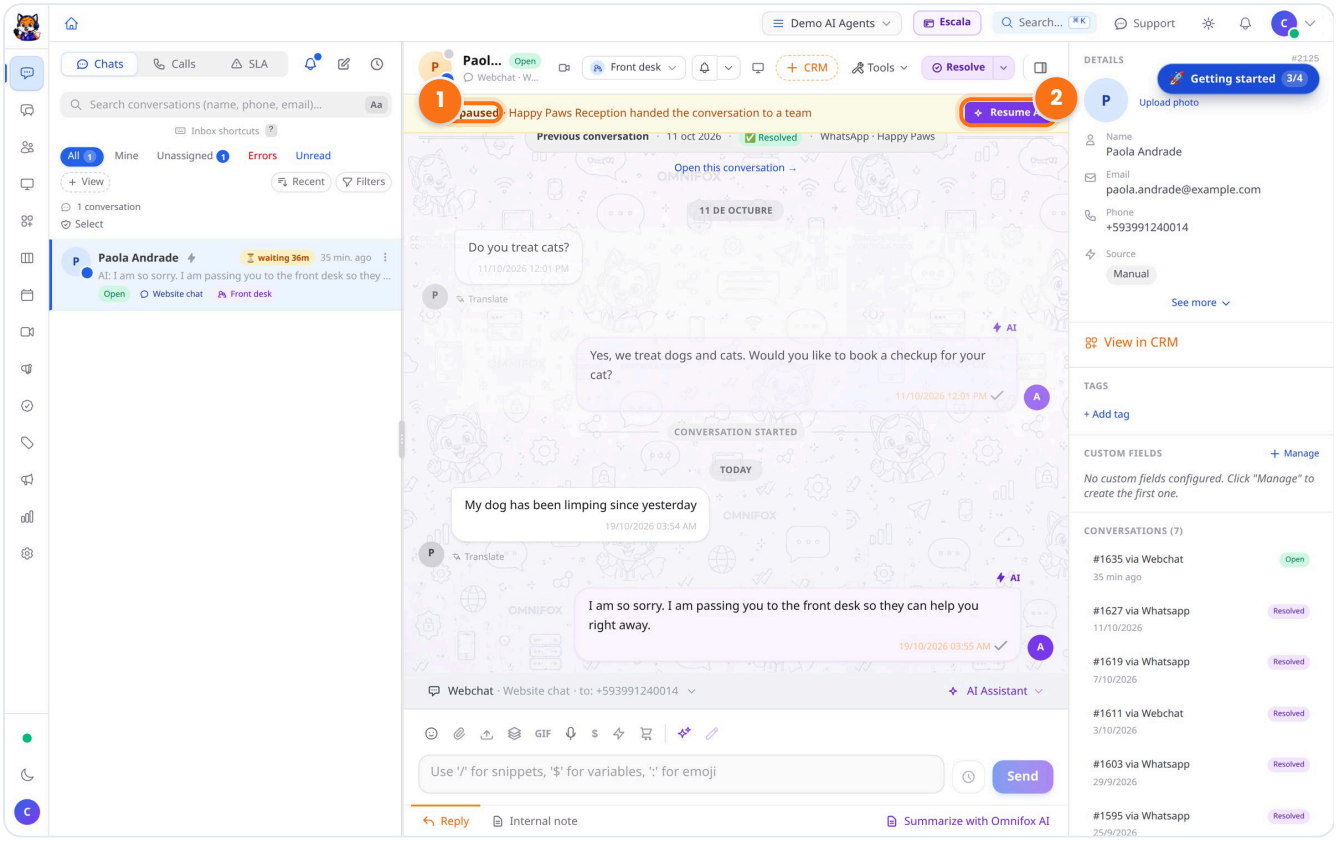
11

CHAPTER 11

Turning on, pausing and measuring

Switching it on, giving a conversation back and seeing how it's doing.

1 Click **Save and activate**, top right of the editor. From then on it replies on the connected channels.

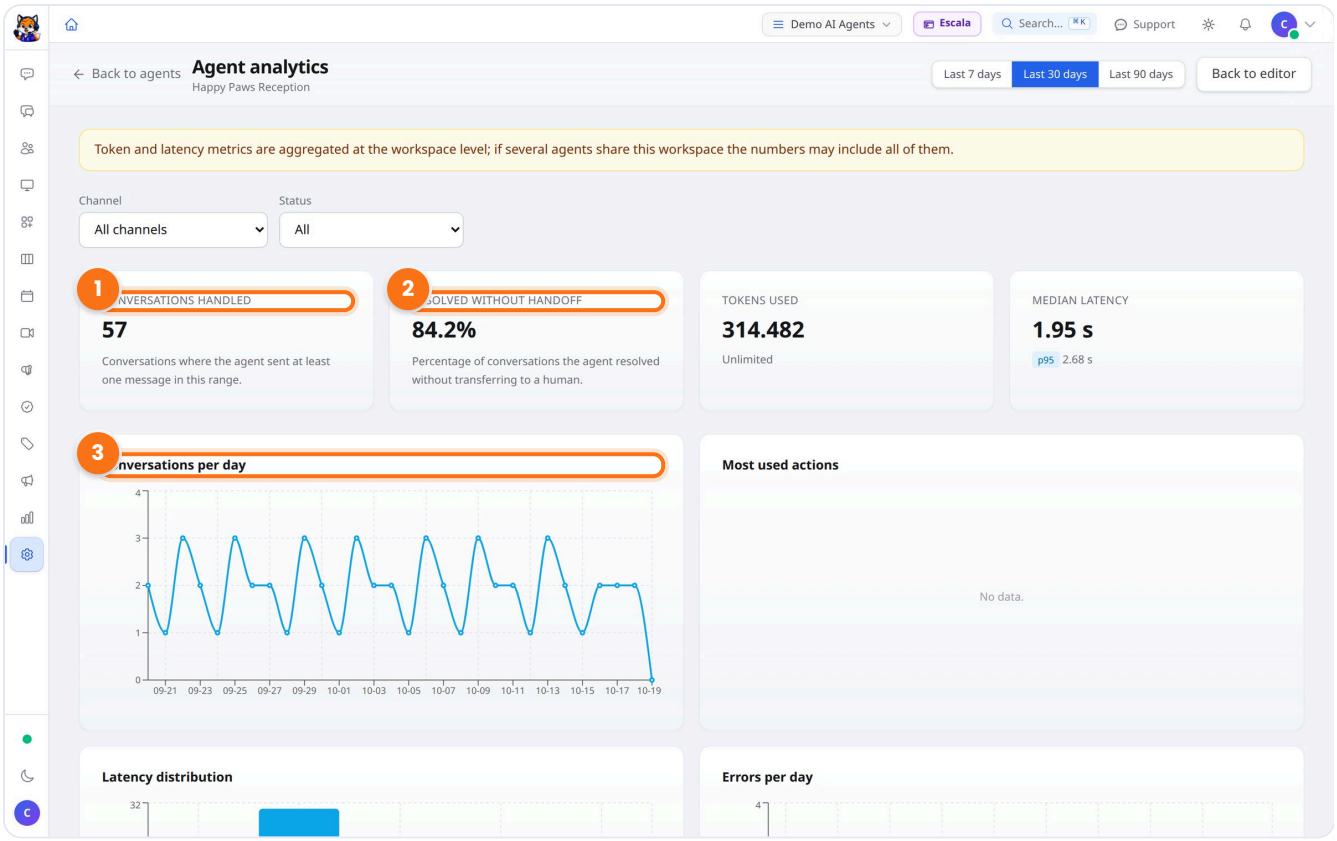


In the inbox: the AI handed the conversation to the Front desk and paused.

1 **AI paused** and the reason.

2 **Resume AI**: gives the conversation back to the agent.

The AI also pauses on its own when someone on the team writes in the conversation, so two never talk at once.



View analytics: agent metrics by period (7, 30 or 90 days) and channel.

1. Conversations where it replied at least once.
2. Share resolved without a person.
3. Activity per day; further down, latency, errors and the latest conversations.

12

CHAPTER 12

Frequently asked questions

What people ask most before switching an agent on.

Can the agent make up prices or times?

With the tools and knowledge, it answers with your data. That's why you should turn on the search tools, link your documents and tell it in the instructions to hand over when it doesn't know. Check the Trace in the tester.

How much does it cost?

Each reply uses AI credits from your plan depending on the engine level and the length of the instructions. Generating an agent with "Describe your business" uses no balance.

What if the customer asks to talk to a person?

It transfers according to your escalation settings (to a person, a team or unassigned) and the AI pauses in that conversation.

Can I test with a single number before opening it to everyone?

Yes: use the contact allow list in Behavior.

Does it reply in other languages?

Yes: by default it detects the customer's language. To always use one, tick "Always reply in the agent's language".

Can I go back to an earlier version of the instructions?

Yes, from History in Instructions.



Need help?

Write to us from **Support**, top right in Omnifox, or watch the video tutorial on the Omnifox YouTube channel. More at omnifox.io.