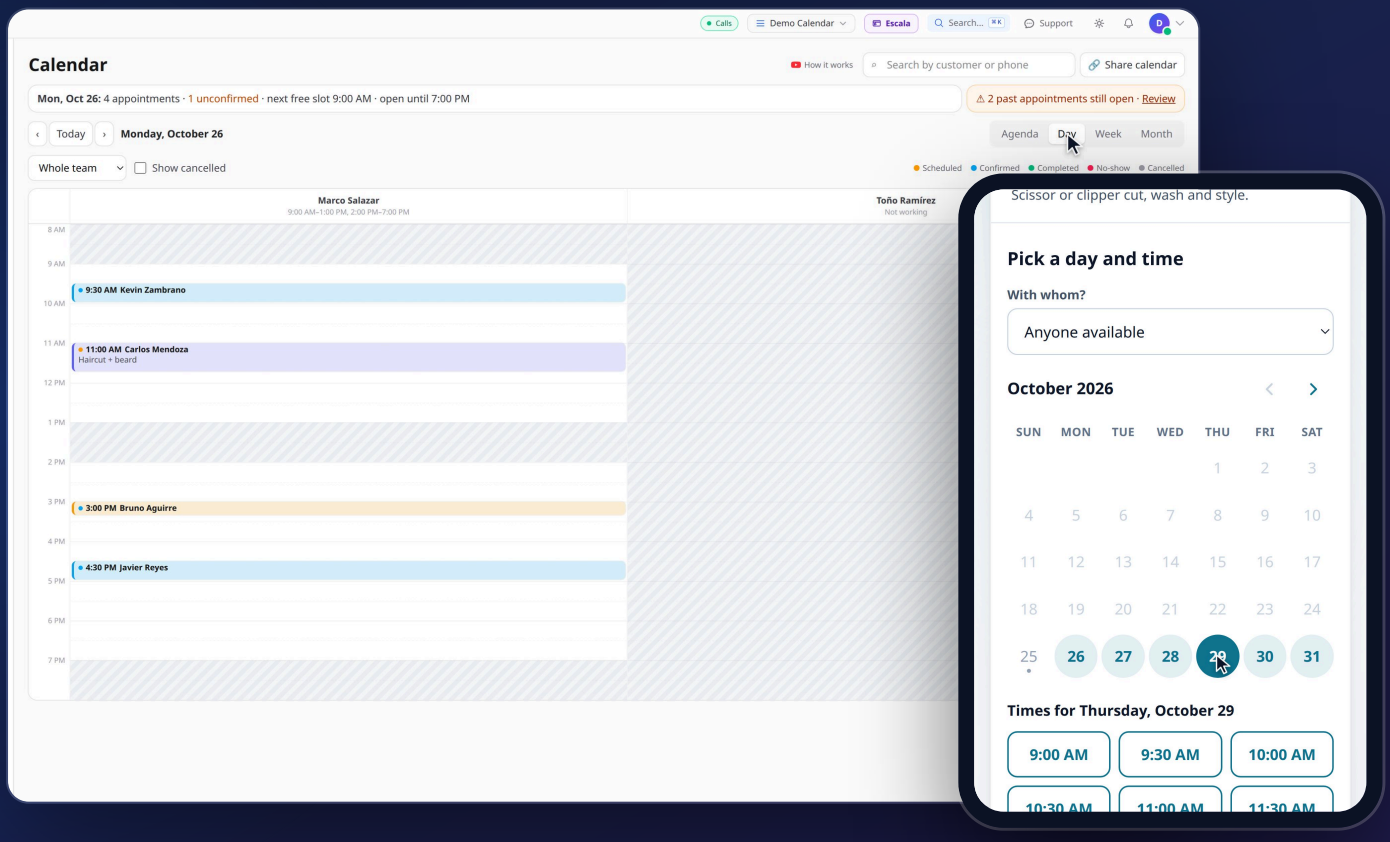
Omnifox

COMPLETE GUIDE · USER MANUAL

# Calendar

Your appointment calendar in Omnifox, end to end: views, calendars, hours per professional, services, online booking, WhatsApp notices, the AI that books for you, automations and reports.



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**How to read this manual**

The screenshots are real Omnifox screens with a sample business, **El Clásico Barbershop**, a fictional barbershop in Guayaquil with two barbers: **Marco Salazar** and **Toño Ramírez**. The person using the screen is Diego Paredes, the admin. The customers and appointments are made up.

Button and field names are in **bold**, exactly as they appear on screen. This manual follows the order of the "Calendar complete guide" video on the Omnifox YouTube channel and goes further. Some features depend on your plan and on the permissions your admin gives you (chapter 34).

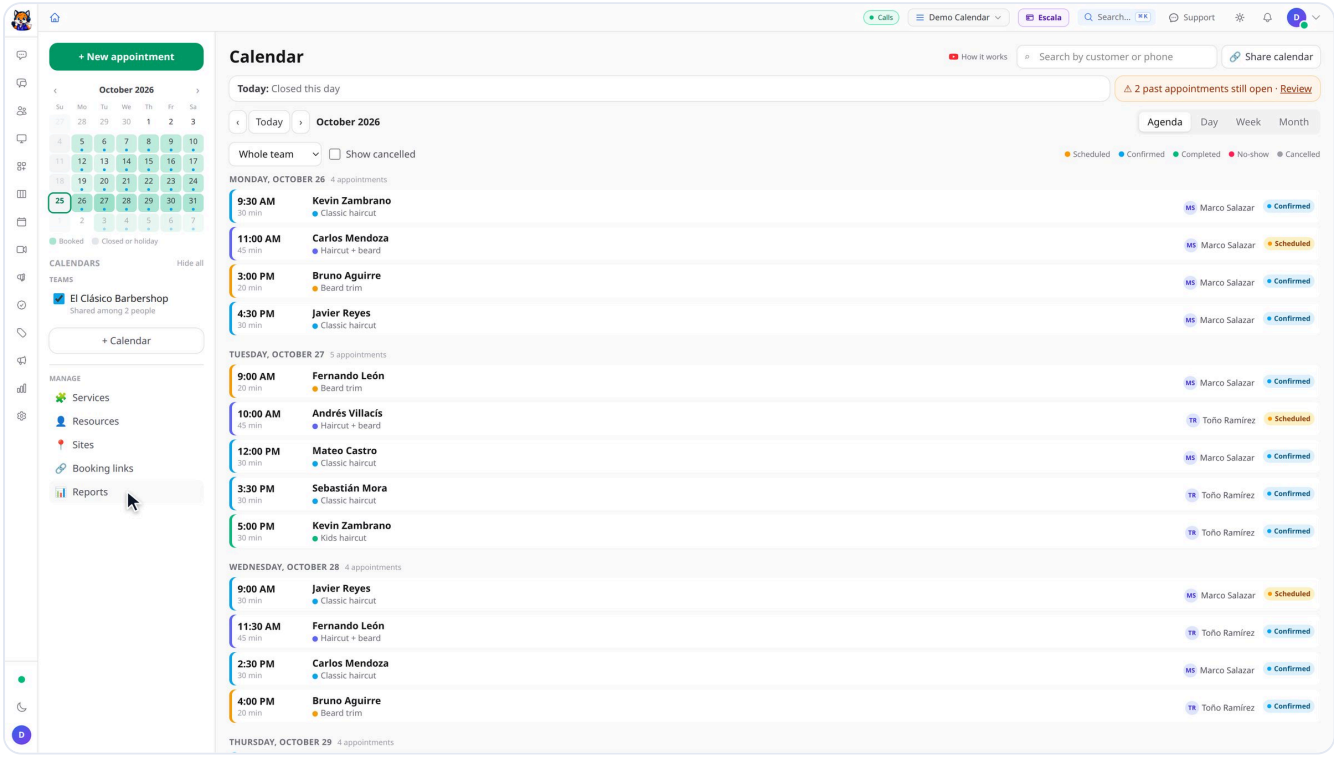
01

CHAPTER 1

# A tour of the screen

Where everything is: the sidebar, the day summary, the notices and the search box.

The Calendar (the **Calendar** menu in the Omnifox sidebar) stores your appointments and works out real availability: business hours, each professional's hours, each service's duration, prep times, holidays and the appointments that already exist. With that, it only offers free times in the calendar, on the public booking page and in the chat with your AI agent.




The Calendar in Agenda view: on the left New appointment, the mini calendar, the calendars and Manage; on top the views, the search box and Share calendar.

| Area | What you find |
|---|---|
| Left column | The **New appointment** button, the mini calendar to jump to a date, your calendars grouped by type and, at the bottom, the **Manage** menu. |
| Top | The views (**Agenda**, **Day**, **Week**, **Month**), the arrows and **Today**, the day summary, the search box and the **Share calendar** button. |
| Center | The calendar in the view you choose. |

## The Manage menu

| Option | What it is for | Chapter |
|---|---|---|
| **Services** | Appointment types: duration, price, capacity, policies. | 13 to 15 |
| **Resources** | The people who attend and the spaces or equipment, each with its own hours. | 16 to 18 |
| **Sites** | The addresses where you see customers, if you have more than one. | 18 |
| **Booking links** | The public links so your customers book on their own. | 27 |
| **Reports** | Appointments, occupancy, no-shows, cancellations and waitlist. | 33 |

## The mini calendar and its legend

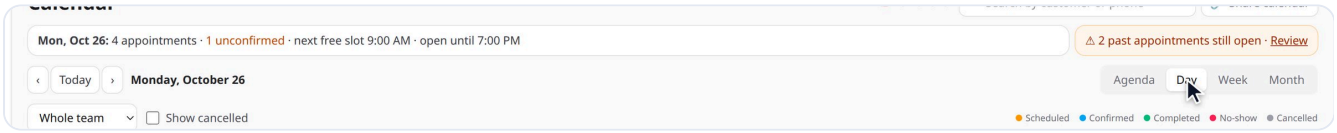
Clicking a day takes you to that date; its arrows change the month. Below it is the legend: days in green (**Booked**) have appointments and grey ones (**Closed or holiday**) are days you are closed.

## The day summary

On top, one line tells you how the day looks: how many appointments there are (**:n appointments**), how many are **unconfirmed**, the **next free slot** and until what time you are open (**open until**). If there is no room left, it says **no free slots left**.

## The past appointments still open notice

If there are appointments that already happened and nobody marked whether the customer came, an orange notice appears (**3 past appointments still open**, for example) with the **Review** button. We cover it in chapter 25.




The day's summary and, on the right, the notice of past appointments not closed with the Review button.

The **How it works** button opens this guide's video and this PDF manual.

02

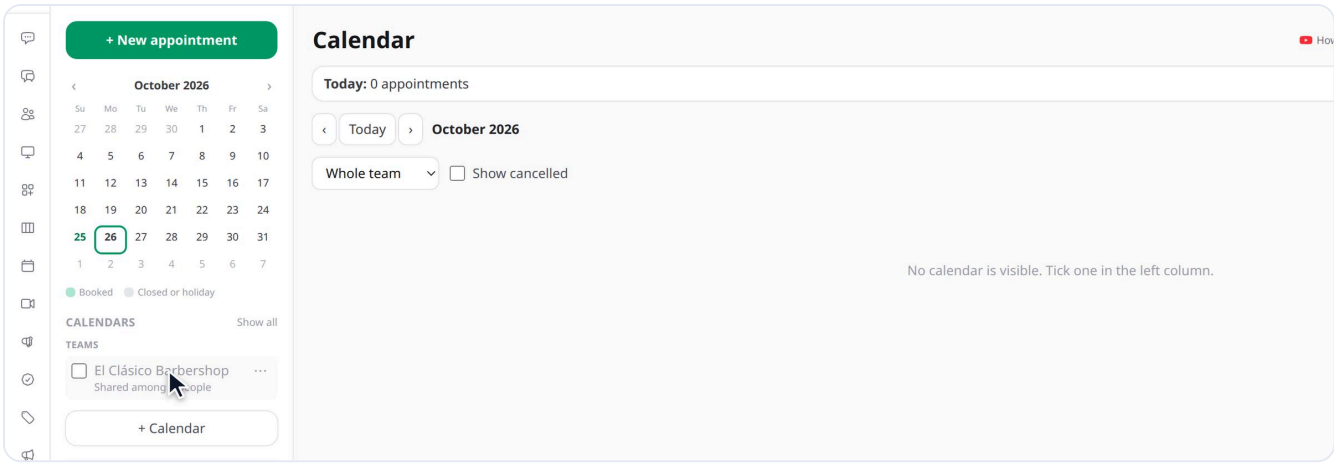
CHAPTER 2

# Your calendars: show, hide and options

Several calendars in view, or just the one you need.

---

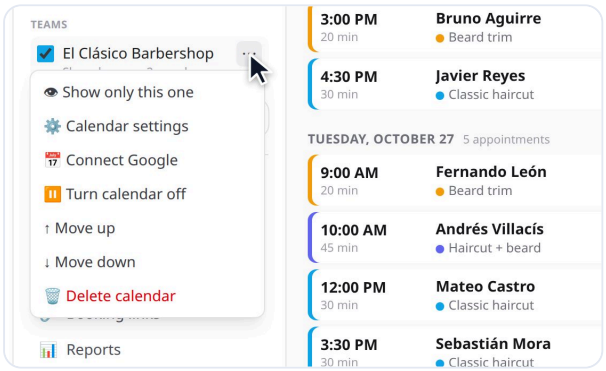
You can have as many calendars as you need. In the left column they are grouped by type: **Mine**, **Teams**, **Resources** (rooms or equipment) and **Shared**. Under each team calendar you can read how many people it shares appointments among (**Shared among 2 people**).




One click hides the calendar (box unticked) and the agenda warns that no calendar is visible.

| Action | How |
|---|---|
| Show or hide a calendar | One click on its name. Its appointments appear in or disappear from the calendar. |
| See only that calendar | Double-click its name, or **Show only this one** in its menu. |
| Clear the view | **Hide all**; with **Show all** they come back. |

## The calendar's three-dot menu




A calendar's three-dot menu (Calendar options).

| Option | What it does |
|---|---|
| **Show only this one** | Hides the other calendars. |
| **Calendar settings** | Opens the Hours, Holidays, Routing and Notices tabs (chapters 8 to 11). |
| **Connect Google** | Syncs with your Google Calendar (chapter 12). |
| **Turn calendar off** / **Turn calendar on** | A calendar that is off stops taking bookings, but is not deleted. In the list it shows as **off**. |
| **Move up** / **Move down** | Changes the order in the list. |
| **Delete calendar** | Deletes it, deciding what happens to its upcoming appointments (chapter 12). |

> **TIP**
>
> If you see no appointments at all, check that at least one calendar is ticked: with all of them hidden the calendar says “No calendar is visible”.

CHAPTER 3

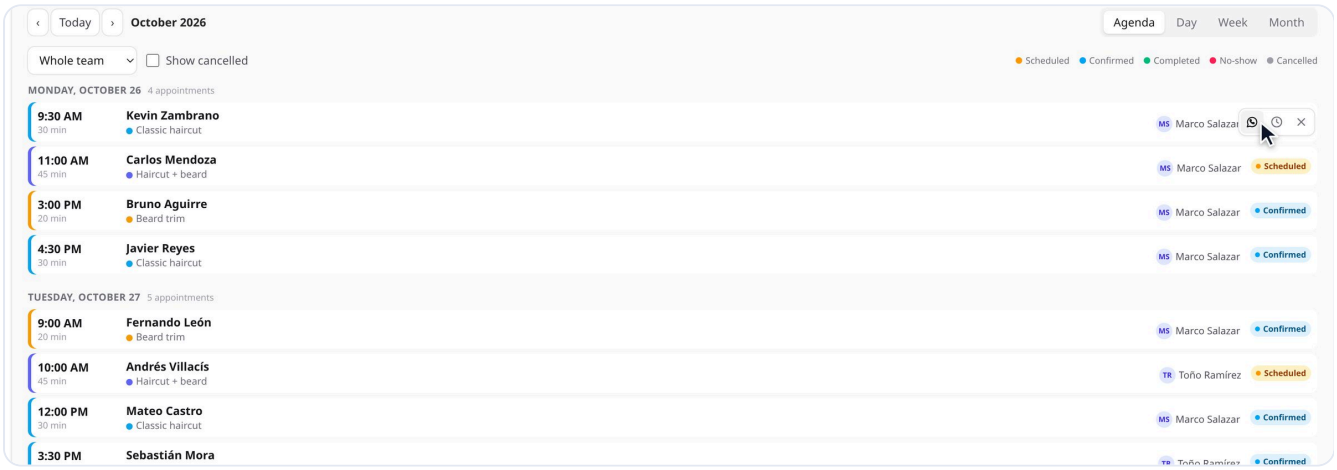
# 03 The Agenda and Day views

The list of upcoming appointments and the day view with one column per professional.

There are four views: **Agenda**, **Day**, **Week** and **Month**. You switch them with the buttons on top.

## Agenda

The **Agenda** view is a list of upcoming appointments, grouped by day. On each row: time, duration, customer, service, who attends and status.




Agenda view: time, duration, customer, service, who serves and status, with the color legend on top.

| Status color | Meaning |
|---|---|
| **Scheduled** | Booked; the customer has not confirmed yet. |
| **Confirmed** | The customer confirmed they are coming (or your team marked it). |
| **Completed** | The customer came. |
| **No-show** | The customer did not show up. |
| **Cancelled** | It was cancelled; only visible with **Show cancelled**. |

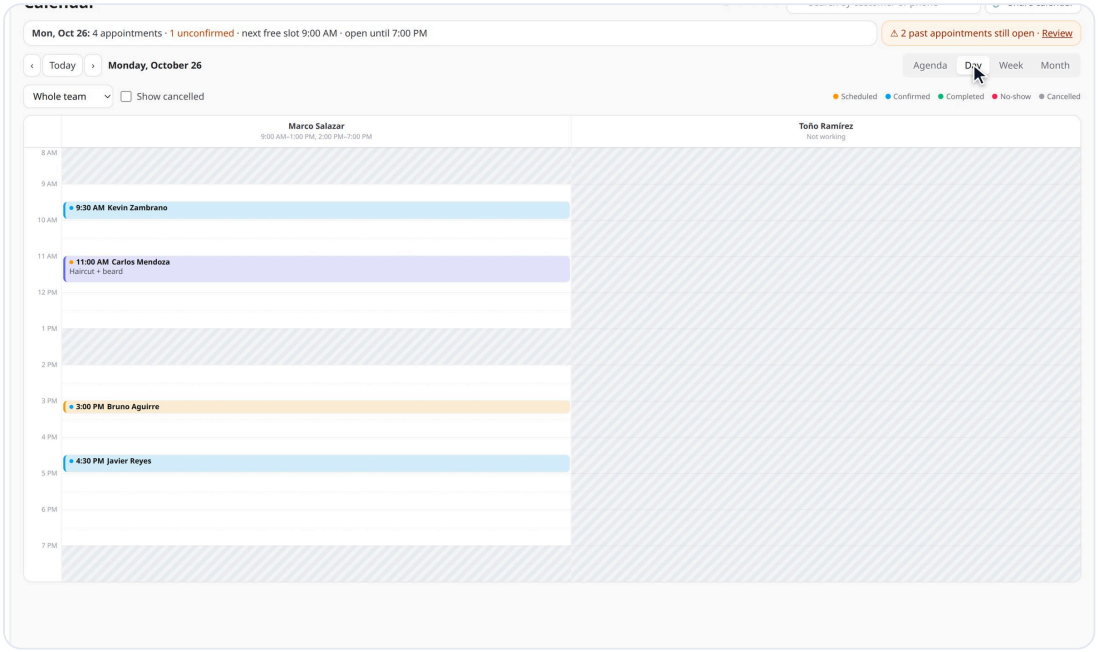
With the **Filter by person** filter you see only one professional's appointments (for example, Toño's). With **Whole team** you see them all again. The filter works in every view.




Filtered to show only Toño Ramírez's appointments.

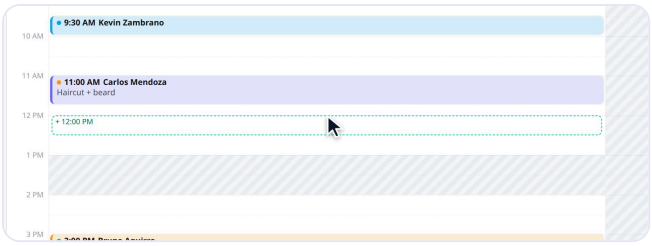
## Day: one column per professional

The **Day** view shows one column per professional, with their hours on top. The **striped** areas are when that person does not work: before opening, their lunch (**Break**) or a whole day off (**Not working**), like Toño's Monday. Appointments with no professional assigned go in the **No professional** column.

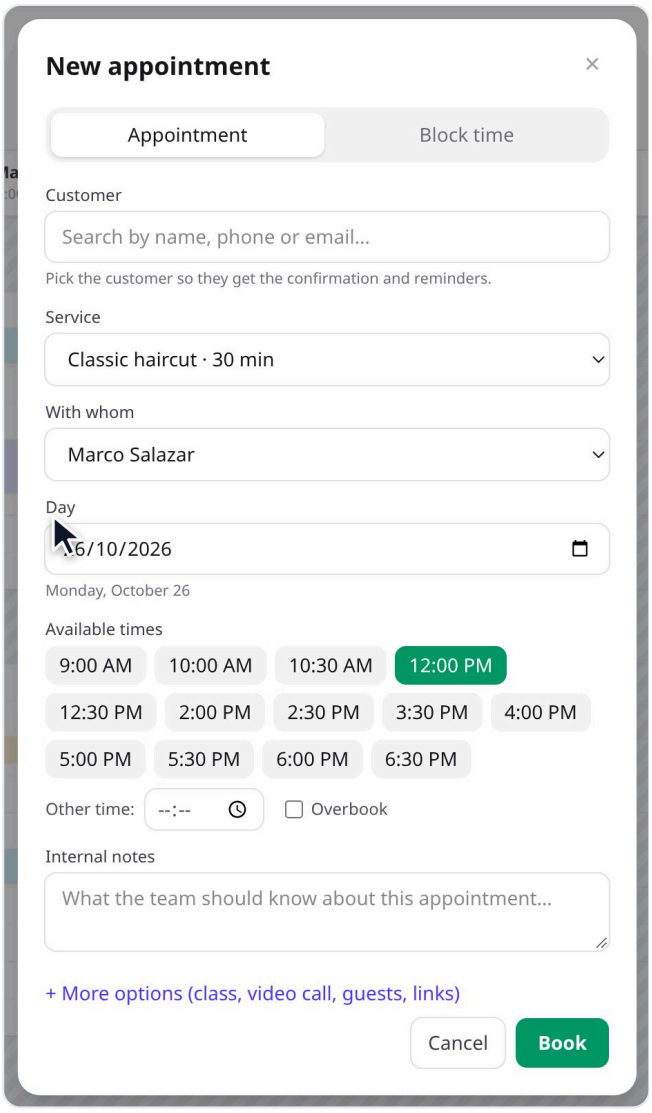



Day view: one column per barber with their hours on top. The striped areas are when they don't work (Marco's lunch, Toño's Monday).

1. Hover over a free slot: the time appears.
2. Click: **New appointment** opens with that professional, day and time already filled in.
3. Fill in the customer and the service, and tap **Book** (chapter 19).




Hovering over a free slot shows the time.




Clicking the slot opens New appointment with the professional, day and time already filled in.

Each appointment shows the time, the customer and a dot with its status color. One click opens its details (chapter 22).

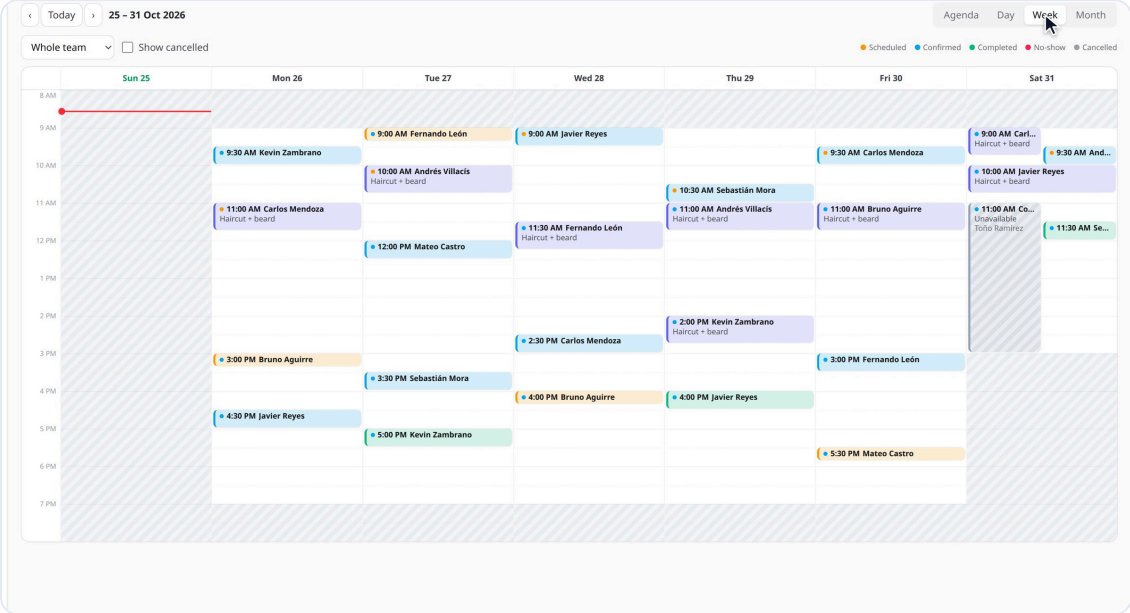
CHAPTER 4

# 04 Week, Month and moving between dates

The whole week, the month at a glance and the shortcuts to jump between dates.

## Week

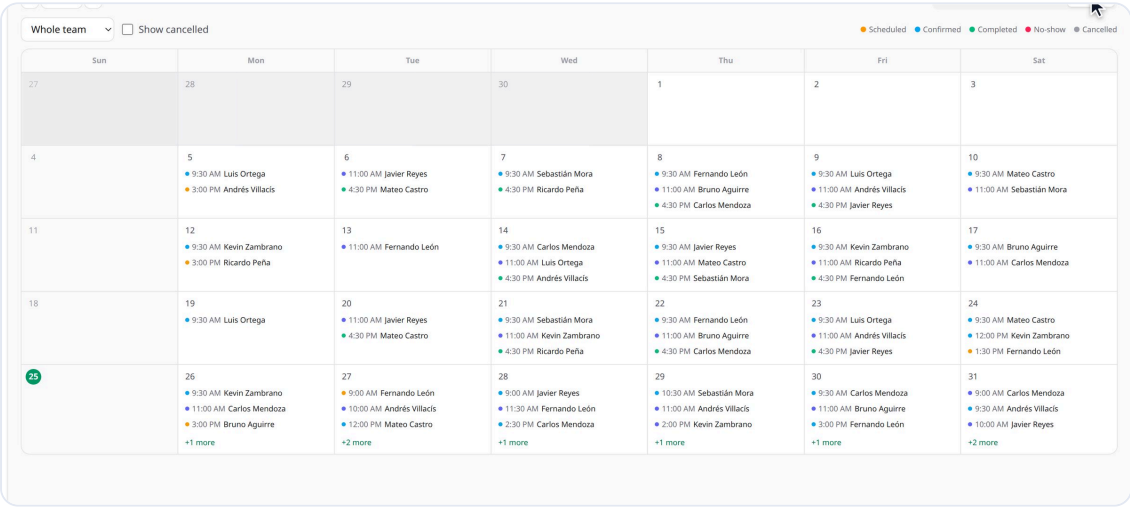
The **Week** view is a seven-day grid with every appointment at its time. Closed days and holidays are striped; a holiday shows its name.




Week view: seven days with appointments at their time; Sunday, closed, is striped.

## Month

The **Month** view shows the whole month with each day's appointments. If a day has many, it tells you how many more there are (**+3 more**). Clicking the day takes you to the Day view for that date.




Month view, with each day's appointments and how many more there are.

## Moving between dates

| Control | What it does |
|---|---|
| **Previous** / **Next** arrows | Go back or forward one day, week or month, depending on the view. |
| **Today** | Back to today. |
| Mini calendar | Clicking any day takes you there; its arrows change the month. |

05

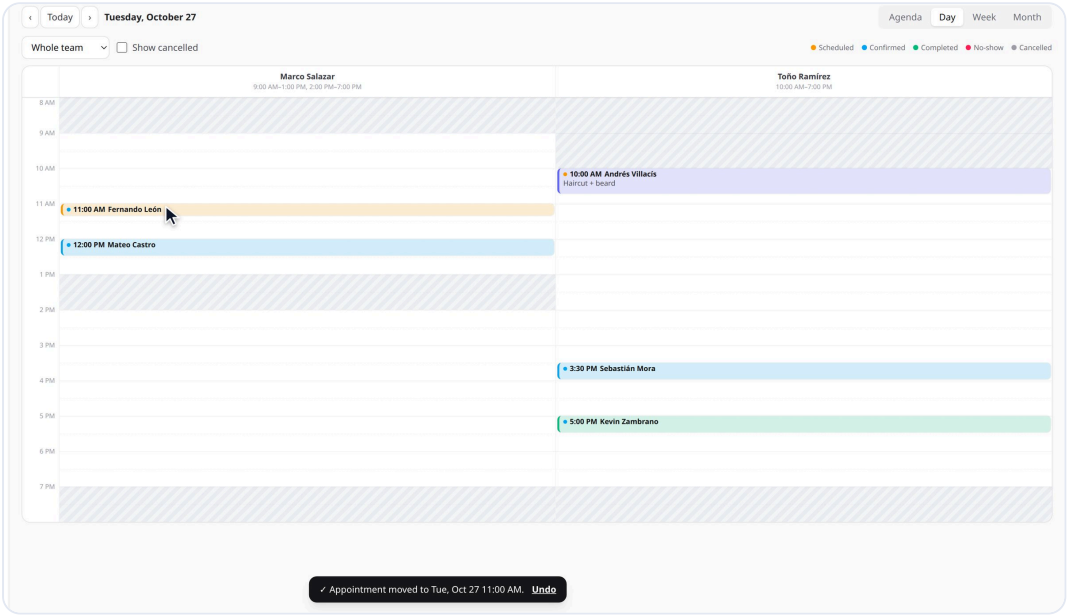
CHAPTER 5

# Drag to move or lengthen, and Undo

Change an appointment's time with the mouse, without opening anything.

## Move to another time

1. In the **Day** or **Week** view, grab the appointment with the mouse.
2. Drag it to the new time (or to another day, in Week) and drop it.
3. Omnifox checks that the time is free and that the professional works at that time. If all is well, the notice **Appointment moved to...** appears.




An appointment dragged to another time, with the notice and the Undo button below.

If the new time does not work, the appointment does not move and the notice tells you why:

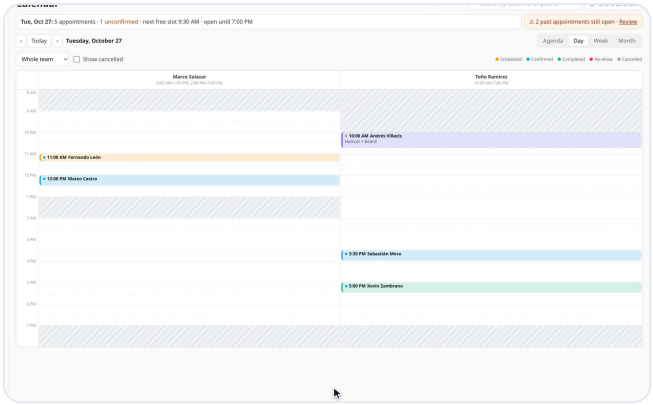
| Notice | What happened |
|---|---|
| **That time clashes with another appointment. Nothing was changed.** | There is already another appointment at that time. |
| **That person can't at that time...** | The professional is on a break, outside their hours or busy with another appointment. |
| **That time is outside business hours.** | The business is closed at that time. |

## Undo

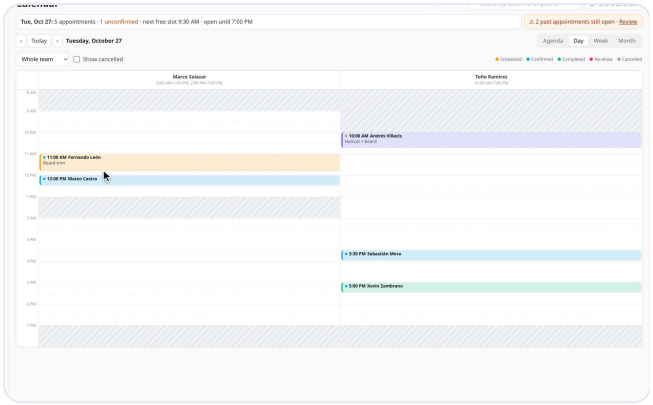
The notice at the bottom has the **Undo** button: one click and the appointment goes back to its place.

## Lengthen or shorten

Grab the bottom edge of the appointment (**Drag to make it longer or shorter**) and stretch it. The new duration is saved by itself (**Now lasts 50 min.**, for example).



With Undo the appointment goes back to its place.



Dragging the bottom edge makes the appointment longer.

**HEADS UP**

Dragging cannot move an appointment to another professional: the notice says “To move the appointment to another professional, open it and reschedule.” Open the details and use Reschedule or Change under Handled by (chapters 22 and 24).

**TIP**

To let go of a drag without changing anything, press Escape.

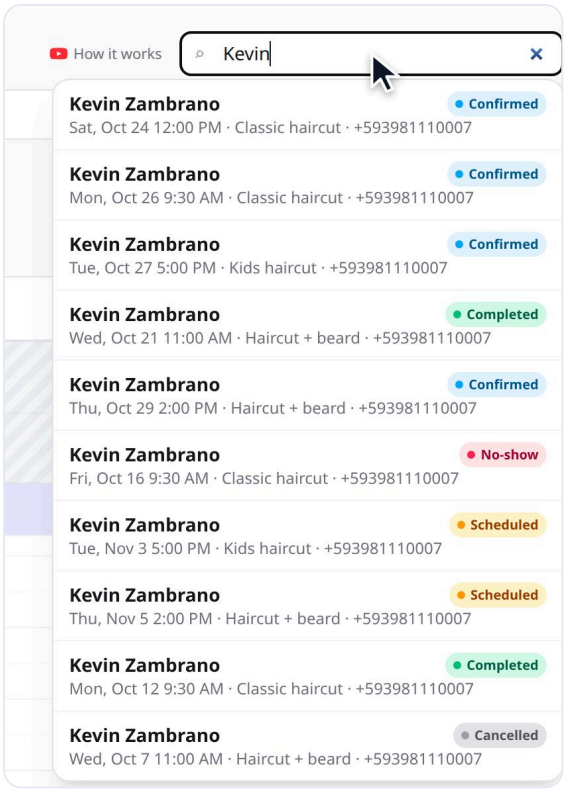
06

CHAPTER 6

# Find an appointment and see cancelled ones

Find a customer’s appointment in seconds, from any date.

1. Type the customer’s name or phone in the search box on top (**Search by customer or phone**).
2. Their appointments from any date appear, sorted by how close they are to today.
3. Click one to open its details. With **Escape** you clear the search box.




Search results, from any date.

### Show cancelled

Cancelled appointments are not shown in the calendar. If you tick **Show cancelled**, they appear crossed out, with their reason in the details (**Cancelled on...**, **Reason:...**).

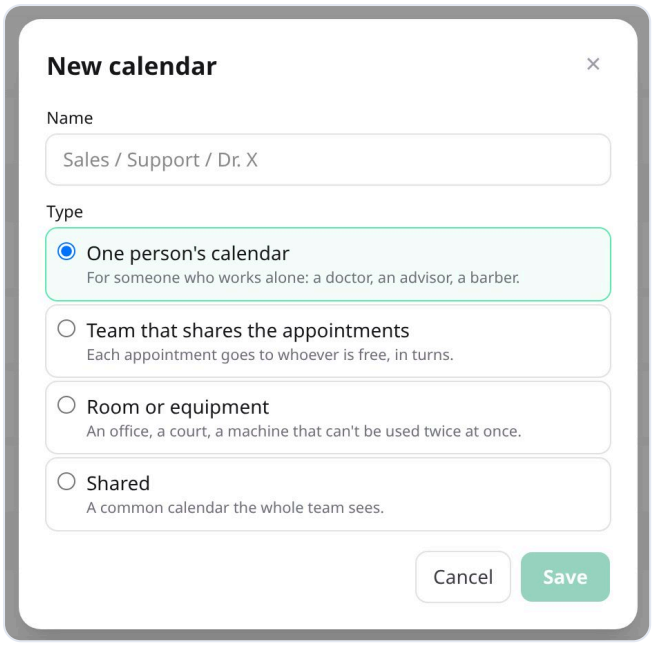
07

CHAPTER 7

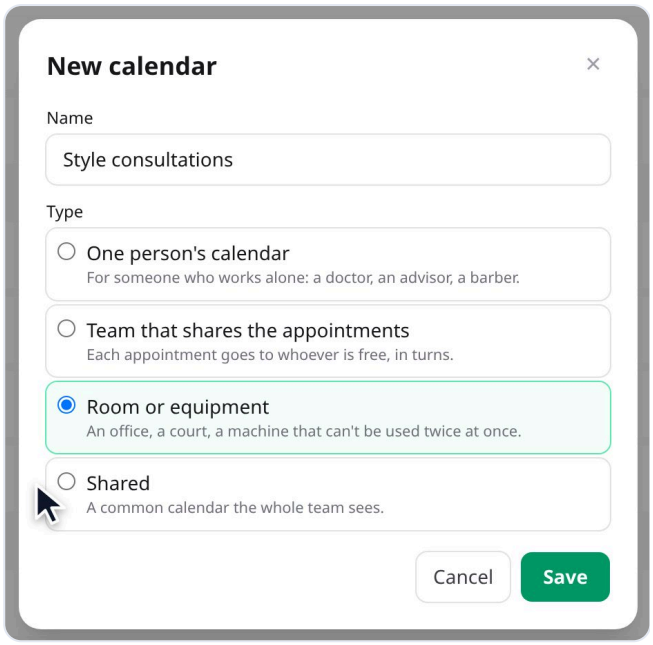
# Create a calendar: the four types

One person, team, room or shared: pick the one that fits your business.

1. In the left column, tap **+ Calendar** (**New calendar**).
2. Type the **Name** (for example, “El Clásico Barbershop” or “Dr. Pérez”).
3. Pick the **Type**. In a team calendar, tick the **Team members**.
4. Tap **Save**. Then adjust its settings (chapters 8 to 11).




New calendar: name and type.




The four types, with their explanation.

| Type | What it is for | Example |
|---|---|---|
| **One person's calendar** | For someone who works alone. | A doctor, an advisor, an independent barber. |
| **Team that shares the appointments** | Each appointment goes to whoever is free, according to the routing. | The barbershop with Marco and Toño; a sales team. |
| **Room or equipment** | Something that cannot be used twice at once. | An office, a court, a machine. |
| **Shared** | A common calendar the whole team sees. | Internal meetings, on-call shifts. |

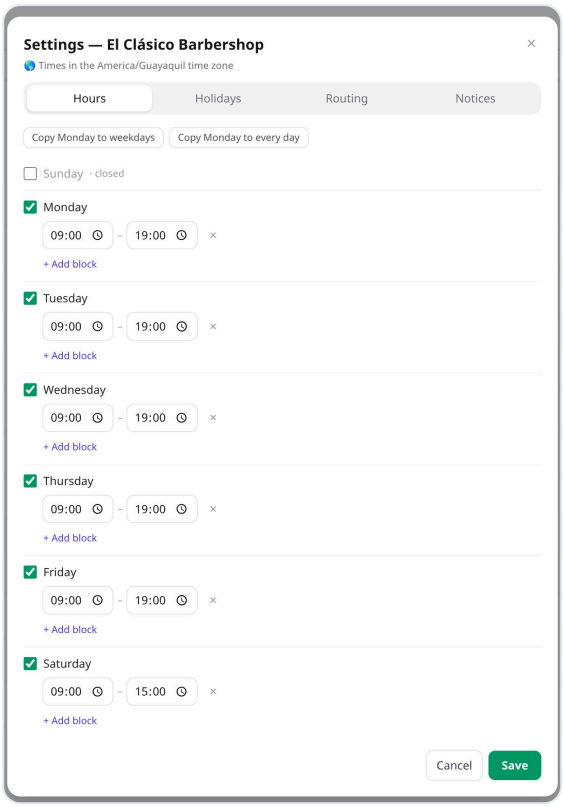
El Clásico Barbershop uses a **team** calendar: the customer asks for a haircut and the appointment goes to the free barber, or to the one the customer chooses.

CHAPTER 8

# 08 Business hours and holidays

When you are open each day and which days you are closed.

Open the calendar's three-dot menu and choose **Calendar settings**. The window (**Settings — El Clásico Barbershop**) has four tabs: **Hours**, **Holidays**, **Routing** and **Notices**. On top you see the time zone all times are read in (**Times in the America/Guayaquil time zone**).




Settings, Hours tab: blocks per day, the buttons to copy Monday and the time zone.

## Hours

1. For each day, type **from** and **to**. If you are closed on a day, turn it off: it shows as **closed**.
2. If there is a lunch break, tap **Add block** and enter the second range (for example, 9:00–13:00 and 14:00–19:00).
3. To avoid repeating, use **Copy Monday to weekdays** or **Copy Monday to every day**.
4. Tap **Save**.

The barbershop opens Monday to Friday from 9:00 to 19:00, Saturday from 9:00 to 15:00, and is closed on Sunday.

| Message | How to fix it |
|---|---|
| **End time must be later than start time.** | Check that “to” is later than “from”. |
| **Blocks cannot overlap.** | Two ranges on the same day overlap; adjust them. |
| **Add at least one block or turn the day off.** | A day that is on needs at least one range. |

**HEADS UP**

With no day selected, the calendar stays open 24 hours every day. Check the hours before sharing your booking link.

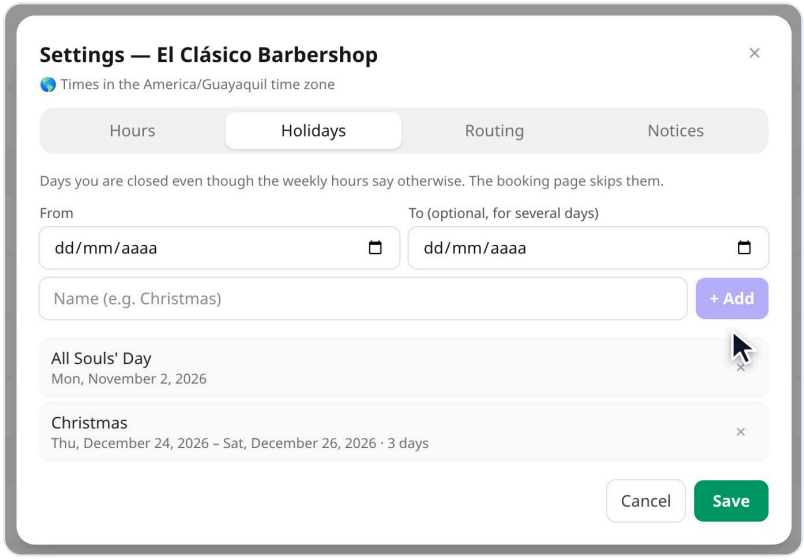
## Time zone

The **Calendar time zone** is inherited from the organization. If you change it, it stops following it; with **Follow the organization time zone again** you get it back. Your customers see times in their own time zone on the booking page (chapter 28).

## Holidays

In **Holidays** you mark the days you are closed even though the hours say you are open.

1. Pick the date in **From**.
2. For several days, fill in **To (optional, for several days)**.
3. Type a name (**Name (e.g. Christmas)**) and tap **Add**.




Named holidays, single days or ranges.

In the example: November 2, **Día de los Difuntos** (All Souls' Day), and December 24 to 26, **Christmas**. The booking page and the AI skip those days on their own, and in the calendar they are striped with their name (**Holiday: Christmas**). To delete one, use **Remove holiday**.

> **NOTE**
> Your team can still book by hand on a holiday if needed (for example, with Other time or Overbook).

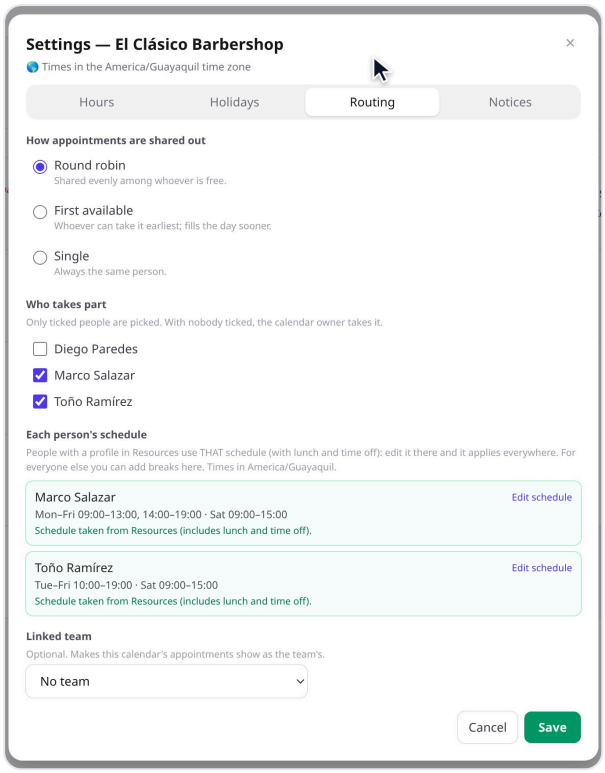
# 09

CHAPTER 9

# Routing among people

How a team calendar's appointments are assigned, and to whom.

The **Routing** tab only matters in calendars where more than one person attends.




Routing: the mode, who is included and each person's hours taken from Resources.

## How appointments are shared out

| Mode | How it works | When to use it |
|---|---|---|
| **Round robin** | Shared evenly among whoever is free. | So everyone gets a similar load. |
| **First available** | Whoever can take it earliest; fills the day sooner. | To always offer the nearest time. |
| **Single** | Always the same person. | A team calendar that only one person handles for now. |

## Who takes part

Tick the people who attend. Only ticked people are picked; with nobody ticked, the calendar owner takes it. If the customer chooses who with (on the booking page or in the chat), the appointment goes to that person.

## Each person's schedule

People with a profile in **Resources** use *that* schedule, with their lunch and time off: here you see it summarized (**Schedule taken from Resources (includes lunch and time off).**) and you change it with **Edit schedule**. Anyone without a profile can get one with **Give them their own schedule in Resources**.

## Breaks per person

For people without a profile in Resources you can add breaks here: **Add break**, the **Break days** and the range. During their break that person gets no appointments from this calendar and the slot offers one place less.

## Linked team

Optional: link an Omnifox team so this calendar's appointments show as the team's (**No team** to link none).

> **TIP**
> If a barber works different hours from the business (starts later, takes a day off), create their profile in Resources. It is the most precise way: it applies to the calendar, the booking page and the AI (chapter 16).

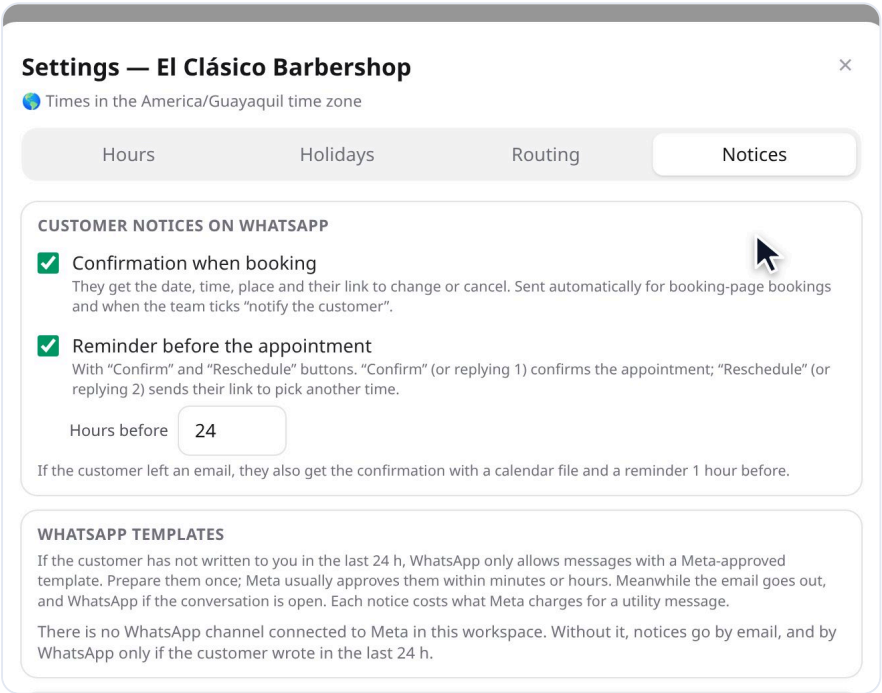
CHAPTER 10

# 10 Customer notices on WhatsApp

The confirmation when booking, the reminder with buttons and the Meta templates.

---

The **Notices** tab controls what the customer gets. Omnifox confirms and reminds every appointment **out of the box**, without you building any workflow.




The Notices tab: confirmation when booking and reminder before the appointment.

## Confirmation when booking

They get the date, time, place and their link to change or cancel. It goes out automatically for public booking-page bookings and when someone on the team books with **Notify the customer on WhatsApp** ticked.

## Reminder before the appointment

With the **Confirm** and **Reschedule** buttons. In **Hours before** you decide when it goes out (for example, 24).

| If the customer… | This happens |
|---|---|
| Taps **Confirm** or replies **1** | The appointment becomes **Confirmed** on its own in your calendar and the customer gets “Thank you! Your appointment on… is confirmed.” |
| Taps **Reschedule** or replies **2** | They get their link to pick another time (chapter 29). |

If the customer left an email, they also get the confirmation with a calendar file and a reminder 1 hour before.

## WhatsApp templates

WhatsApp has a rule: if the customer has not written to you in the last 24 hours, it only allows messages with a **Meta-approved template**. That is why the notices use templates.

1. Connect your WhatsApp (Meta official API) in Channels.
2. In **Notices**, tap **Prepare templates**. They are sent to Meta for review just once.
3. Check each one’s status: **approved**, **in review**, **rejected** or **missing**. It updates by itself.

| Template | When it is used |
|---|---|
| **Confirmation** | When booking an in-person, phone or WhatsApp appointment. |
| **Reminder with buttons** | Before the appointment, with Confirm and Reschedule. |
| **Waitlist** | When a time opens up for someone who was waiting (chapter 28). |
| **Confirmation (video call)** and **Reminder (video call)** | The same, with the room link. |

> **NOTE**
> Meta usually approves templates within minutes or hours. Meanwhile the email goes out, and WhatsApp if the conversation is open (the customer wrote in the last 24 h).

> **HEADS UP**
> Each notice costs what Meta charges for a utility message. If there is no WhatsApp channel connected to Meta, the notice goes by email, and by WhatsApp only within the 24-hour window.

11

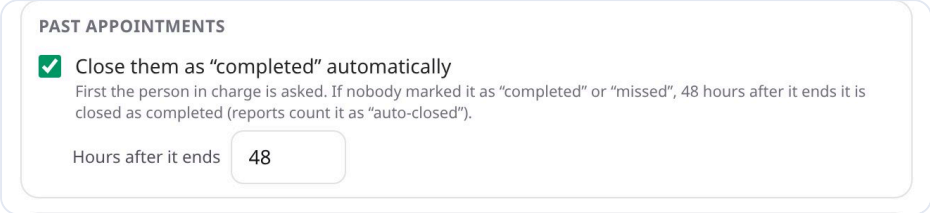
CHAPTER 11

# Past appointments, Post to Team and iCal

Let the calendar close itself, keep the team in the loop and see it on your phone.

## Past appointments: auto-close

First the person in charge is asked whether the customer came. If nobody marked it as completed or missed, with **Close them as "completed" automatically** turned on the appointment is closed as completed after the **Hours after it ends** you choose (48 by default). Reports count it as "auto-closed".

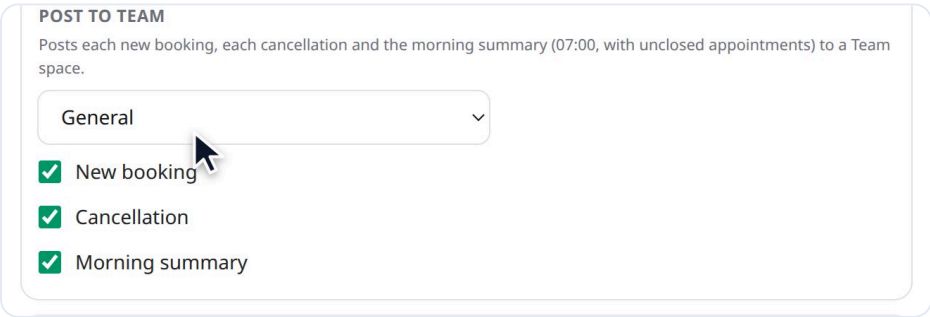



Past appointments: close them as "completed" automatically after the hours you choose.

## Post to Team

Pick a Team space and these are posted there, under the name **Calendar**:

| Notice | Example of what is posted |
|---|---|
| **New booking** | "New appointment: Ricardo Peña · Haircut + beard · Thu Oct 29 10:00 (booking page)" |
| **Cancellation** | "Appointment cancelled: … · Reason: …", with "late cancellation" if it was late. |
| **Morning summary** | At 07:00: "Today in El Clásico Barbershop: 9 appointments", how many are not confirmed yet and the past appointments not closed. |



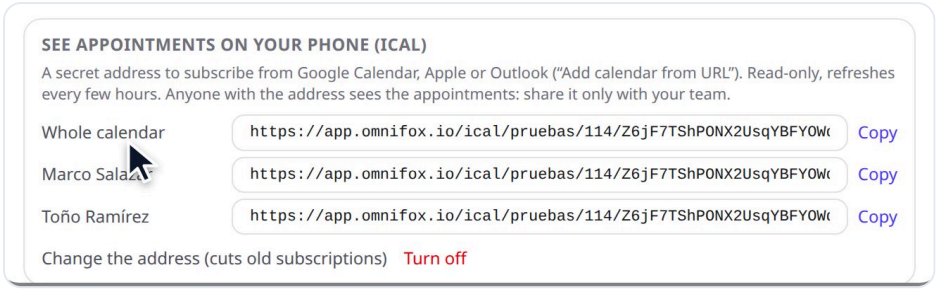

Post to Team: the space and which notices to post.

Choose **Don't post** to turn it off. If you have no spaces yet, create them in Team.

## See appointments on your phone (iCal)

1. Tap **Create address**: the secret addresses appear: one for the whole calendar and one per professional.

2. Copy it with **Copy**.
3. In Google Calendar, Apple or Outlook, use “Add calendar from URL” and paste it.




The secret iCal address, to copy and subscribe.

It is read-only and refreshes every few hours. Anyone with the address sees the appointments: share it only with your team. If it leaks, use **Change the address (cuts old subscriptions)**; with **Turn off** you remove it.

> **TIP**
> iCal is for viewing. For Google to really block times, connect Google Calendar (chapter 12).

# 12

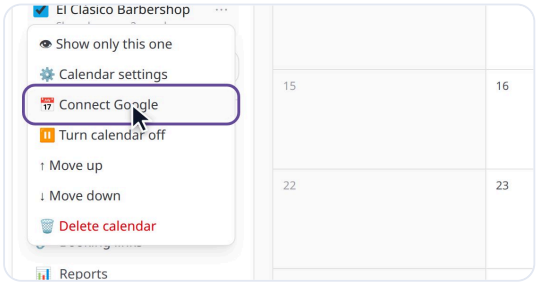
CHAPTER 12

# Google Calendar and deleting a calendar

Your appointments in Google, your Google events blocking times, and how to close a calendar.

## Connect Google Calendar

1. In the calendar’s three-dot menu, tap **Connect Google**.
2. Pick your Google account and accept all permissions (tick the Google Calendar box).
3. Back in Omnifox, in **Add appointments to** pick the Google calendar where appointments will be created.
4. In **Check for conflicts in**, tick the Google calendars whose events should block times. Tap **Save**.




Connect Google, in the calendar menu.

| What | How it works |
|---|---|
| Omnifox → Google | Every Omnifox appointment shows up as an event in your Google Calendar. |
| Google → Omnifox | Events marked **Busy** in the chosen calendars block that time on the booking page and for the AI. Events marked **Free** and the ones you declined do not. |
| Moving or deleting in Google | Does not change the Omnifox appointment. Move or cancel it from Omnifox. |

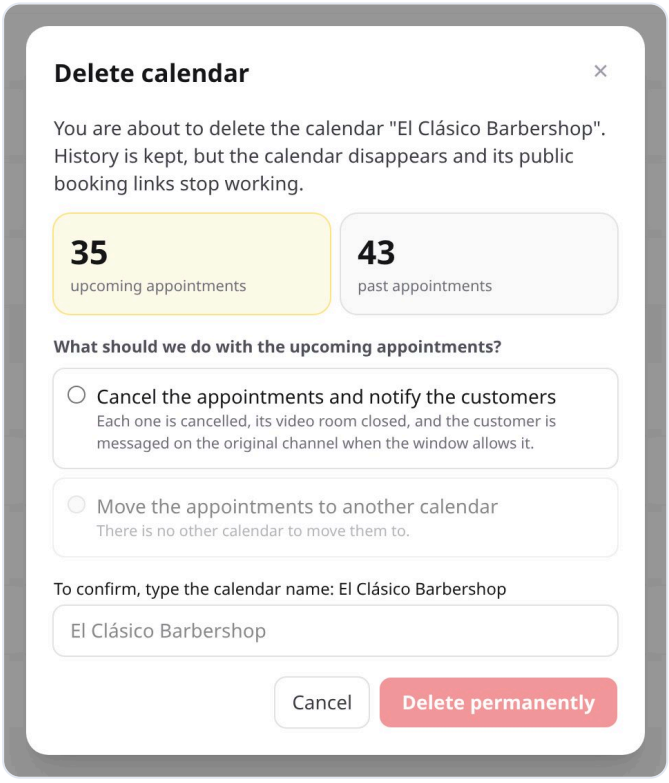
**HEADS UP**

If Google rejects the connection (access was removed or the password changed) or the account was inactive for more than 30 days, you will see “Reconnect Google” and get a notification: reconnect to keep syncing.

Only the person who connected it, the calendar owner or an admin can change the connection. With **Disconnect Google Calendar** the appointments already in Google stay there, but stop being updated.

## Delete a calendar

1. In the calendar menu, tap **Delete calendar**.
2. Check how many **upcoming appointments** and **past appointments** it has.
3. Choose what to do with the upcoming ones: **Cancel the appointments and notify the customers** (each one is cancelled, its video room closed, and the customer is messaged if the WhatsApp window allows it) or **Move the appointments to another calendar** (they keep their date and time).
4. Type the calendar name to confirm and tap **Delete permanently**.




Delete calendar: what to do with future appointments, then confirm by typing the name.

**HEADS UP**

History is kept, but the calendar disappears and its public links stop working. Only the owner or an admin can delete it. If you just want to pause it, use Turn calendar off.

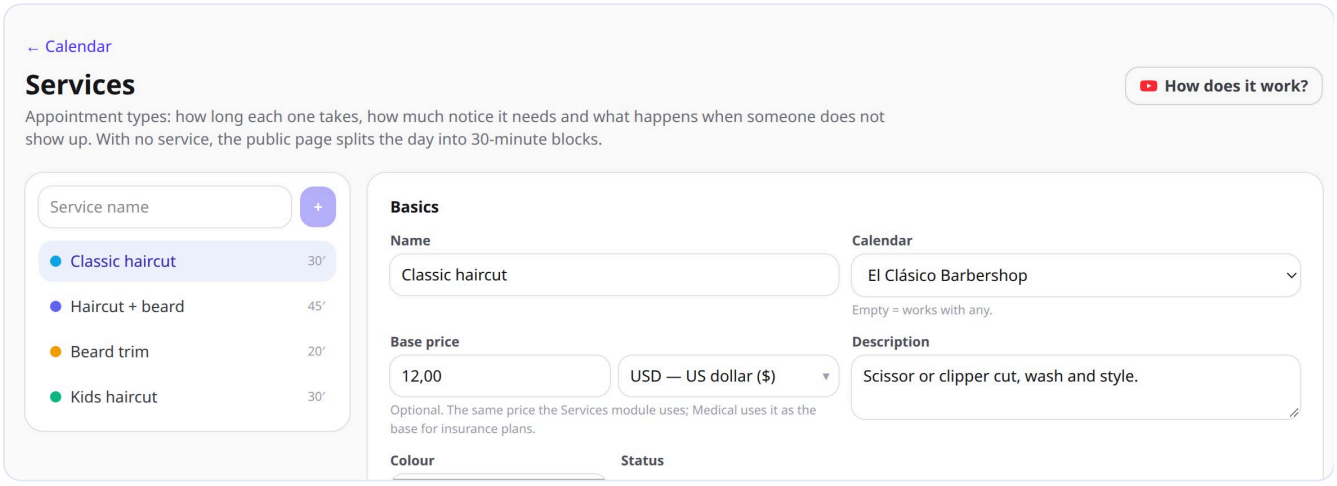
13

CHAPTER 13

# Services: basics, duration and agenda

Appointment types: name, price, duration, capacity and notice.

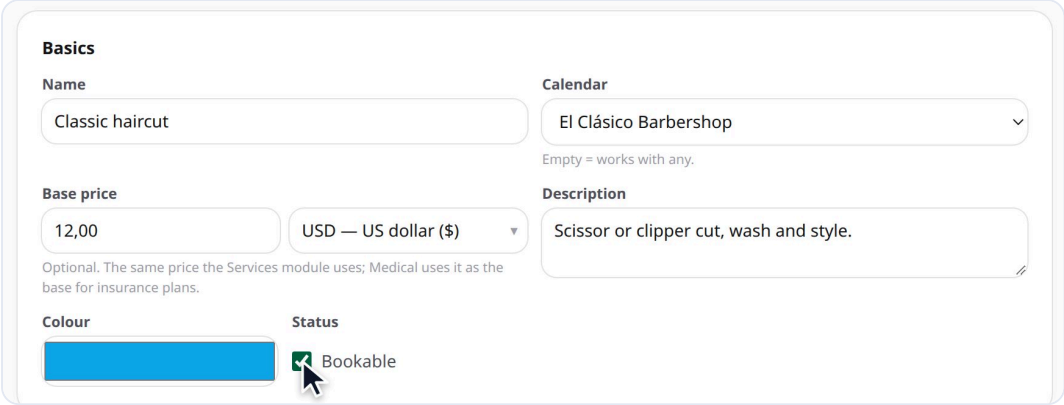
Go to **Manage → Services**. Each service is an appointment type. The barbershop has four: **Classic haircut**, **Haircut + beard**, **Beard trim** and **Kids haircut**. To create one, type the **Service name** above the list and add it; then pick it to set it up.




Manage → Services: the barbershop's list.

## Basics

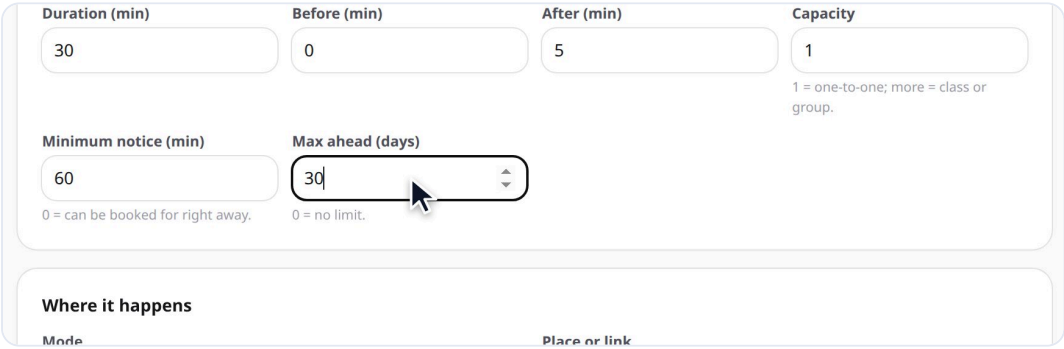
| Field | What it is |
|---|---|
| **Name** | What your customers call it: “Haircut + beard”. |
| **Calendar** | Where it is used. Empty (**All calendars**) works with any. |
| **Base price** | Optional. Shown on the booking page. It is the same price as the catalog’s Services module. |
| **Description** | What it includes; shown to the customer. |
| **Colour** | The color of its appointments in the calendar. |
| **Status** | **Bookable** or **Hidden** (not offered on the page or by the AI). |




The basics: name, calendar, price, description, colour and status.

## Duration and agenda

| Field | What it does | Example |
|---|---|---|
| **Duration (min)** | How long the appointment lasts. | 45 |
| **Before (min) / After (min)** | Prep or clean-up minutes. Duration plus these minutes is the real slot the appointment takes. | 0 / 10 |
| **Capacity** | 1 = one-to-one; more = class or group with several places. | 1 |
| **Minimum notice (min)** | Prevents bookings for a few minutes from now. 0 = can be booked for right away. | 60 |
| **Max ahead (days)** | How many days ahead it can be booked. 0 = no limit. | 30 |




Duration and agenda, with 60 minutes minimum notice and 30 days max ahead.

Tap **Save**. If you change your mind before saving, **Undo** goes back to how it was.

> **TIP**
> With no service, the public page splits the day into 30-minute blocks. Create at least one service for each type of appointment you offer.

> **NOTE**
> Delete service does not delete appointments already booked.

14

CHAPTER 14

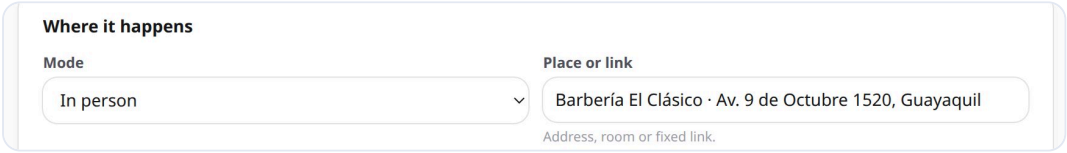
# Services: mode, policies and waitlist

Where the appointment happens and the rules that keep no-shows from filling the calendar.

## Where it happens

In **Mode** you choose how it is held, and in **Place or link** the address, room or fixed link.

| Mode | What the customer gets |
|---|---|
| **In person** | The address of the place, in the confirmation and the reminder. |
| **Phone** | That they will be called. |
| **WhatsApp** | That the appointment is over WhatsApp. |
| **Video (own link)** | Your fixed Zoom, Meet or other link. |
| **Omnifox video call** | Omnifox creates the room by itself for each appointment and sends the link (chapter 26). It is a separate add-on. |
| **Unspecified** | Nothing extra. |

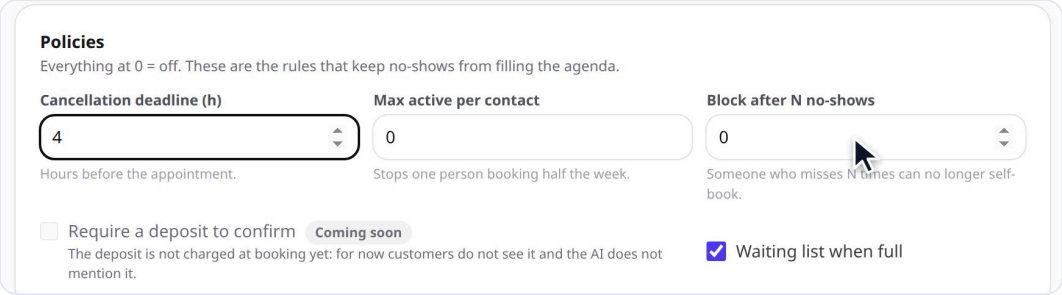



Where it happens: the mode and the place.

## Policies

Everything at 0 = off. These are the rules that keep no-shows from filling the calendar.

| Field | What it does |
|---|---|
| **Cancellation deadline (h)** | Up to how many hours before the customer can cancel or move their appointment themselves. After that, they are warned it may have a cost and, if they cancel anyway, it is marked as a **late cancellation** (chapter 29). |
| **Max active per contact** | Stops one person booking half the week. |
| **Block after N no-shows** | Someone who misses N times can no longer self-book (your team can still book for them). |
| **Require a deposit to confirm** | Marked **Coming soon**: the deposit is not charged at booking yet, customers do not see it and the AI does not mention it. |
| **Waiting list when full** | If a day fills up, the customer can ask to be told if a time opens up (chapter 28). |




Policies: cancellation deadline, max active per contact, no-shows, deposit (Coming soon) and waiting list.

15

CHAPTER 15

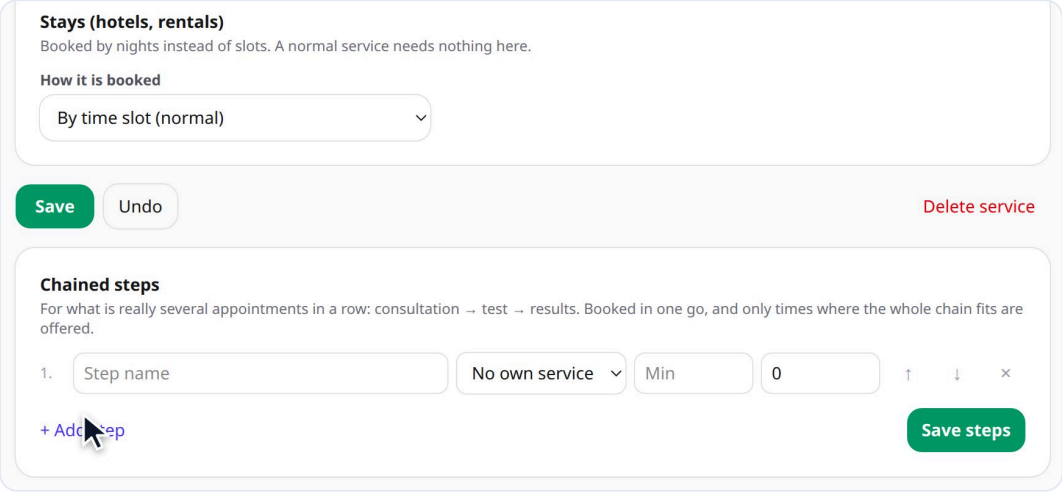
# Chained steps and stays

Several appointments in a row in one go, and bookings by the night.

## Chained steps

For what is really several appointments in a row, like *consultation → test → results*. It is booked in one go and only times where the whole chain fits are offered.

1. In the service, scroll down to **Chained steps** and tap **+ Add step**.
2. Type the **Step name**, pick its **Step service** (or **No own service**), its **Min** and the **Gap** until the next one.
3. Repeat for each step and tap **Save steps**.




Stays (How it is booked) and Chained steps, with one step added.

When booking, the window shows **Times where the whole chain fits**; if a day is not enough, it says **The whole chain does not fit that day.** With no steps, the service is a single appointment.

## Stays (hotels, rentals)

In **How it is booked** switch from **By time slot (normal)** to **By nights**. You set the **Check-in** and **Check-out** times, the **Minimum nights** and the **Maximum nights** (0 = no limit). When booking you pick the check-in, the nights and the room (or **First one free**).

> **NOTE**
> A normal service, like a haircut, needs nothing in this section.

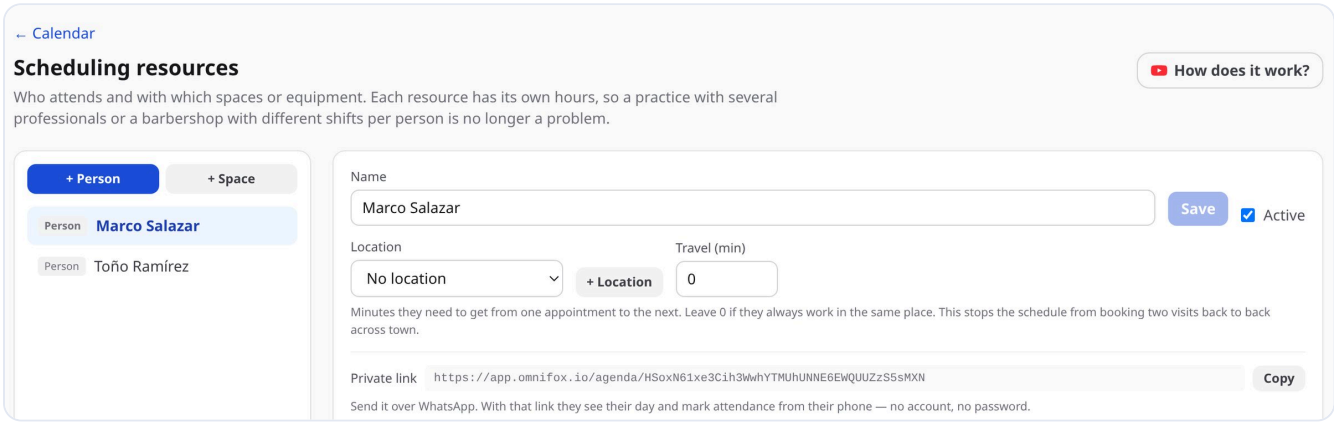
16

CHAPTER 16

# Resources: professionals with their own hours

Each person or space with its own hours, so the calendar never offers an impossible time.

In **Manage** → **Resources** are the people who attend and the spaces or equipment that get used (an office, a chair, a court). Each resource has its own hours.

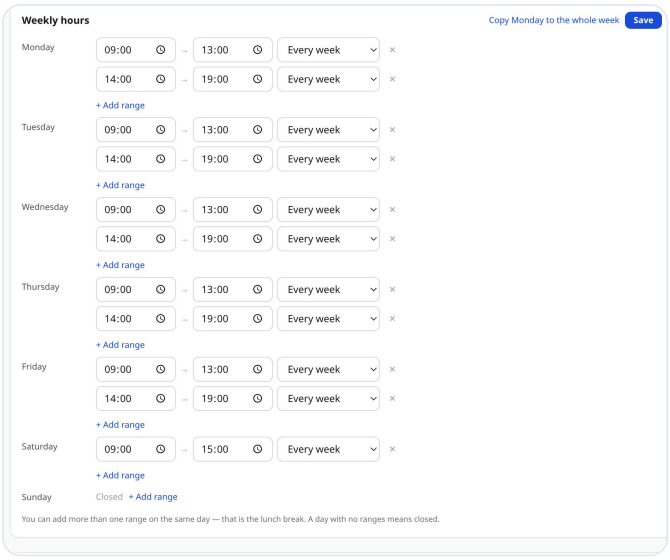



The resource list and Marco's record: name, location, travel time and private link.

1. Tap **+ Person** or **+ Space** and type the name.
2. Pick their **Location** (if you have several) and, if they do home visits, the **Travel (min)** minutes.
3. Enter their **Weekly hours**: one or more ranges per day.
4. Add their **Exceptions** and tick the **Services provided** (chapter 17). Tap **Save**.

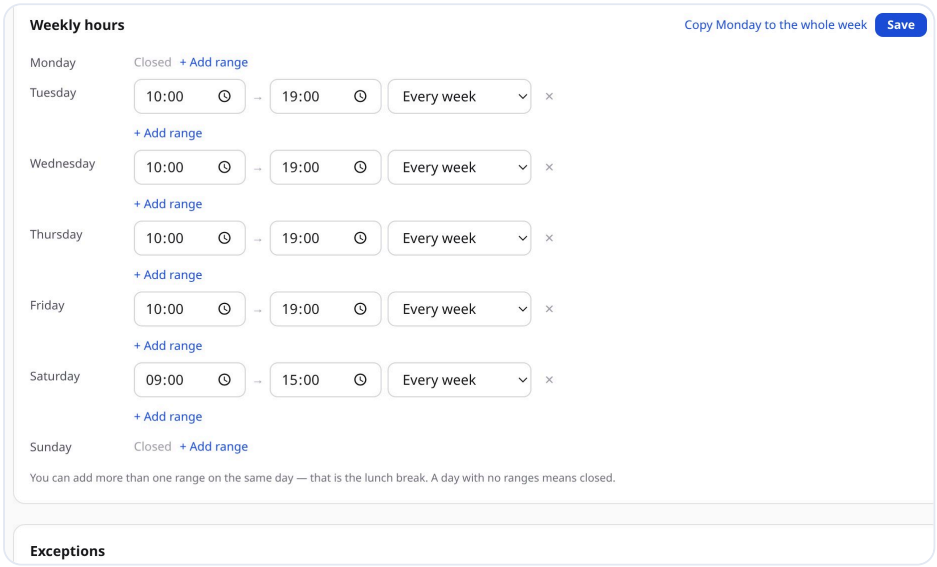
## Weekly hours

You can add more than one range on the same day with **Add range**: that is the lunch break. A day with no ranges means closed (**Closed**). **Copy Monday to the whole week** saves you work.




Marco's weekly hours: two blocks a day with lunch in between.

Marco works from 9:00 to 13:00 and from 14:00 to 19:00 (lunch in between), and on Saturday from 9:00 to 15:00. Toño starts at 10:00 and does not work on Mondays.




Toño starts at 10:00 and doesn't work on Mondays.

## Even and odd weeks

Each range can apply **Every week**, only in **Even weeks** or only in **Odd weeks**. Useful for rotating shifts: for example, every other Saturday.

## Travel

**Travel (min)** is the minutes they need to get from one appointment to the next. Leave 0 if they always work in the same place. This stops the schedule from booking two visits back to back across town.

> **TIP**
> Resources do not need to be Omnifox users: a clinic with twenty professionals does not need twenty licenses. If a resource is linked to a user, its appointments show as handled by that person.

17

CHAPTER 17

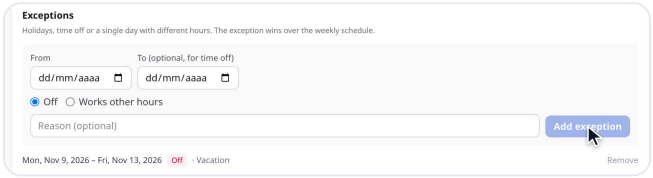
# Exceptions and services provided

Time off, half days and which services each one handles.

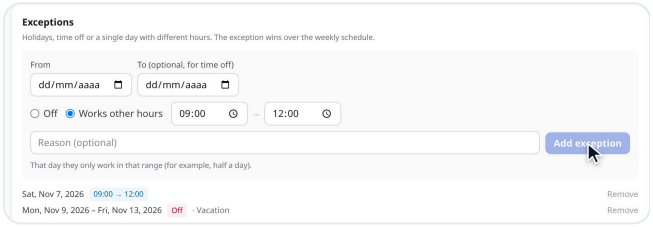
## Exceptions

Time off, personal holidays or a single day with different hours. The exception wins over the weekly schedule.

1. In the resource profile, scroll down to **Exceptions**.
2. Pick the date and, for several days, **To (optional, for time off)**.
3. Choose **Off** or **Works other hours** and, in that case, the range.
4. Type a **Reason (optional)** and tap **Add exception**.




Toño's time off, November 9 to 13.



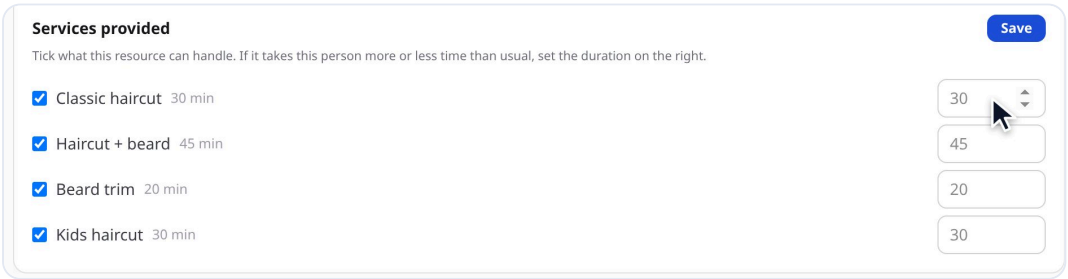

A Saturday with different hours: only 9:00 to 12:00.

In the example, Toño is off from November 9 to 13 (**Off**), and on Saturday the 7th he only works from 9:00 to 12:00 (**Works other hours**: that day he only works in that range). Old exceptions are hidden; with **Show past ones too** you see them again.

> **NOTE**
>
> In the calendar settings, the Routing tab warns you if someone has upcoming exceptions ("Has 2 upcoming exceptions").

## Services provided

Tick which services each resource can handle. If it takes someone more or less time than usual, type their **Own duration in minutes** on the right: the calendar uses that duration when the appointment is with that person.




Services provided, with their own duration on the right.

**TIP**

If a barber does not have a service ticked, the booking page and the AI do not offer it with him.

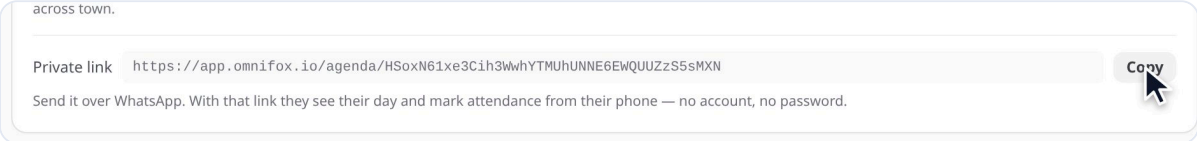
CHAPTER 18

# 18 The professional's private link and sites

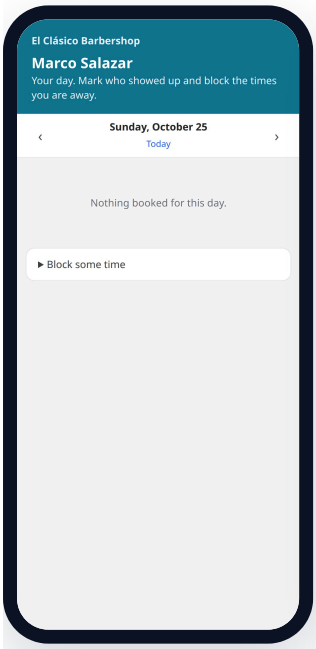
The professional's day on their phone, with no account, and the addresses where you work.

## The private link

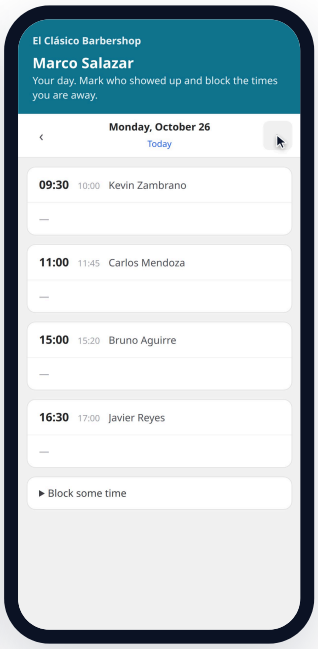
Each resource has a **Private link** (an **/agenda/...** address). Copy it with **Copy** and send it over WhatsApp: with that link they see their day and mark attendance from their phone, with no account and no password.




The professional's private link, ready to copy.




His schedule on Marco's phone; a day with no appointments.




His day, with his customers and Block some time below.

| In "My schedule" | What it does |
|---|---|
| **Today** and the arrows | Change the day. |
| **Showed up** / **No-show** | Mark each customer's attendance; the business calendar updates. |
| Customer phone | To call or message them (or **No phone**). |
| **Block some time** | **From**, **To**, **Reason (optional)** and **Block**: that time stops being offered. |
| **Remove** | Deletes a block. |

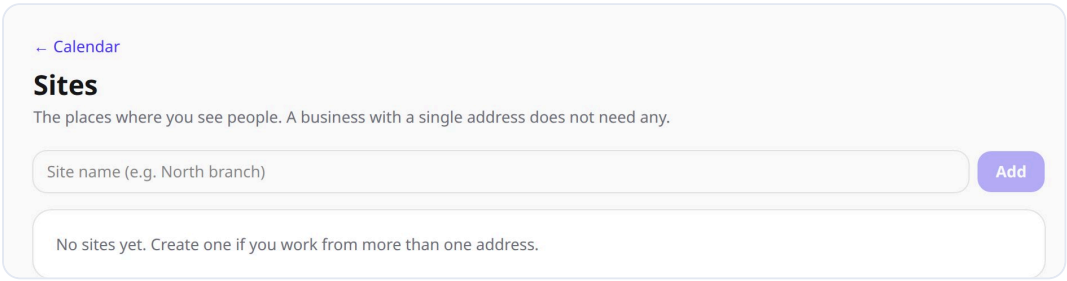
**HEADS UP**

The link is personal: anyone who has it sees that person's schedule. Send it only to that person.

## Sites

If you work from more than one address, go to **Manage** → **Sites**. A business with a single address does not need any.

1. Type the name (**Site name (e.g. North branch)**) and tap **Add**.
2. Fill in the **Address**, **Phone**, **Time zone** and **Colour**. Leave it **Active** and tap **Save**.
3. In **Resources**, assign each professional to their **Location**.




Manage → Sites. The barbershop works at a single address, so it needs none.

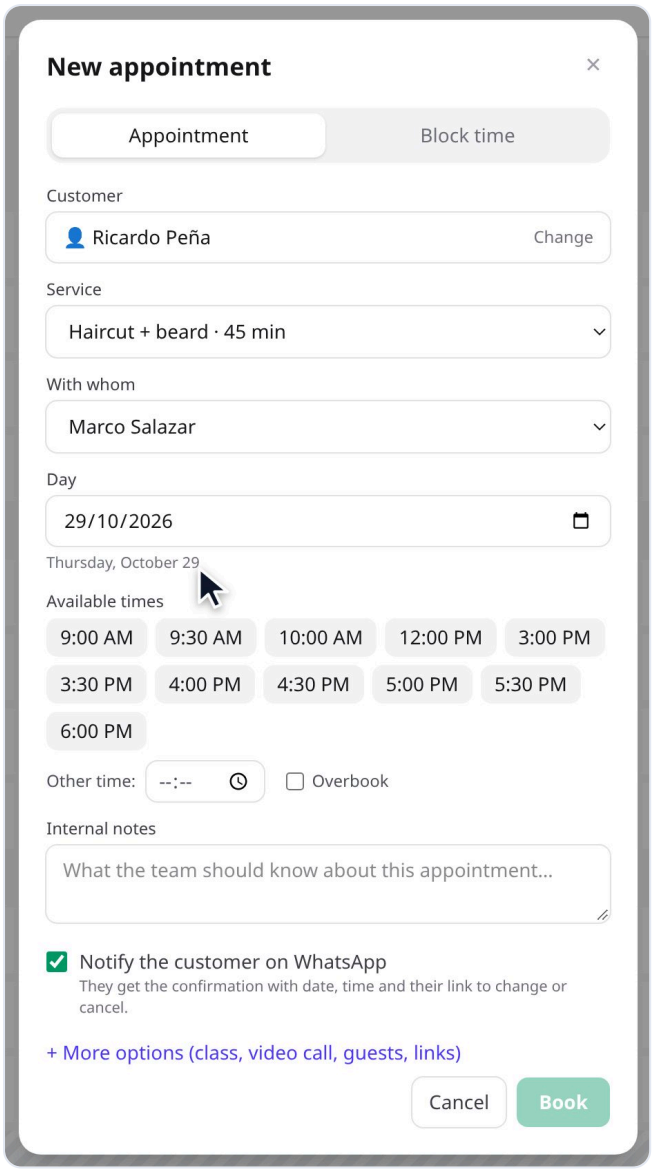
With sites, the customer chooses where to be seen on the booking page (or **Any**) and only the professionals at that site are offered.

CHAPTER 19

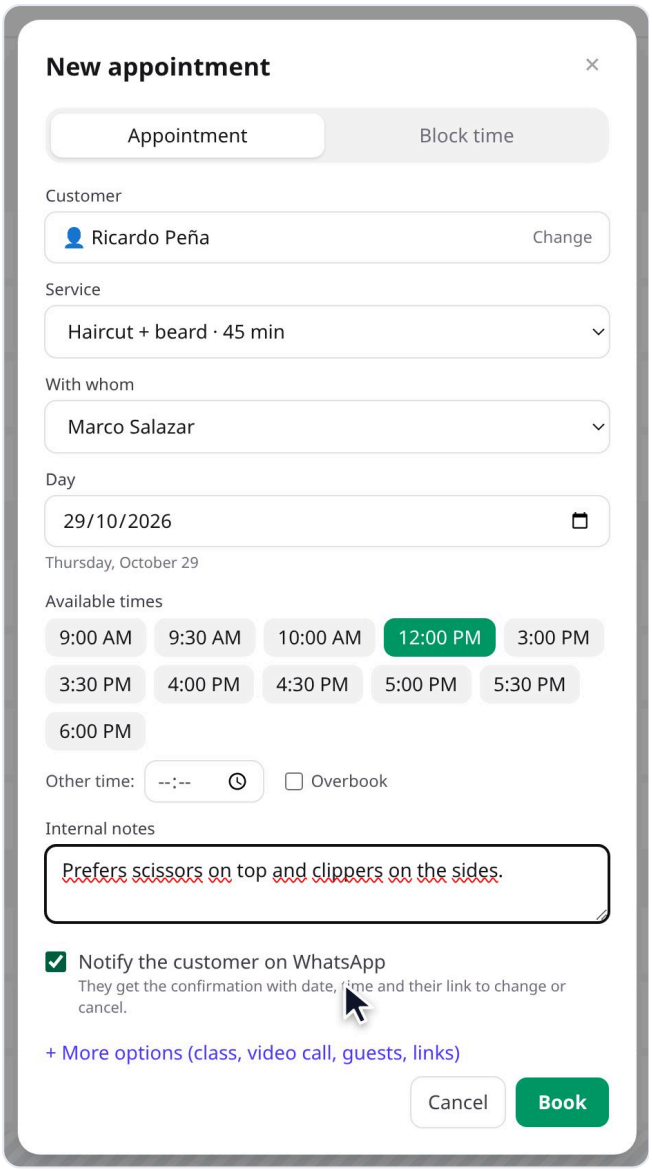
# 19 New appointment step by step

An appointment by hand, for example when someone calls on the phone.

1. Tap **New appointment** (or click a free slot in the Day or Week view).
2. In **Customer**, search by name, phone or email (**Search by name, phone or email...**) and pick them: Ricardo Peña.
3. Pick the **Service** (Haircut + beard) and **With whom**: Marco, or **Anyone available**.
4. Pick the **Day**. **Available times** shows only free times, worked out from the duration, Marco's hours and the appointments he already has.
5. Tap a time. If you like, write **Internal notes** (only your team sees them).
6. Leave **Notify the customer on WhatsApp** ticked so they get the confirmation with their link.
7. Tap **Book**: the notice **Appointment booked.** appears and the appointment is already in the calendar.




Service, with whom, day and only the free times.



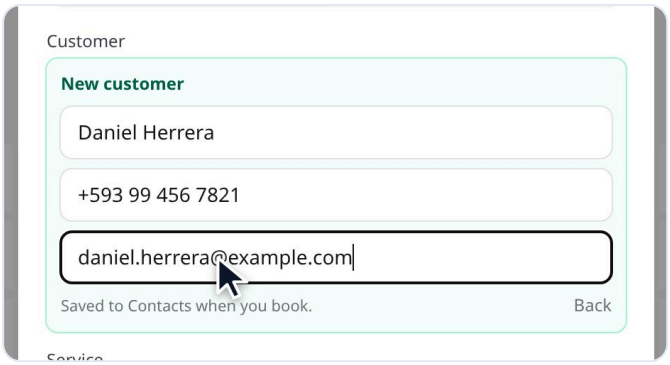

Time chosen, internal notes and Notify the customer on WhatsApp, ready to Book.

**HEADS UP**

Always pick the customer: without one, the appointment has no contact and no confirmation or reminders are sent ("This appointment has no customer").

## New customer

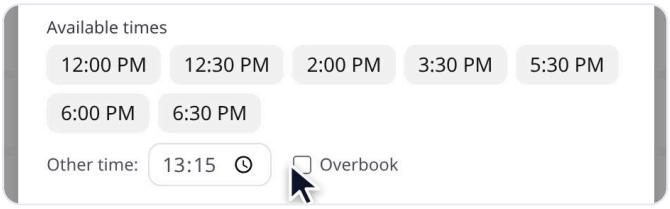
1. Type the name in **Customer** and tap **Create customer "..."**.
2. Fill in **Full name**, **WhatsApp with country code (e.g. +1 555 123 4567)** and, if you like, **Email (optional)**.
3. Carry on with the service and the time. The customer is saved to Contacts when you book.




Creating a new customer with their WhatsApp and email.

## Other time and overbooking

If there are no times left that day (**No free times that day. You can enter a custom time below.**), type the time in **Other time:**, or tap **Find the next day with times**. And if you really need to fit the appointment in even though there is another one at that time, tick **Overbook** (book even if there is already another appointment at that time).




Other time by hand and Overbook.

| Message | What it means |
|---|---|
| **Closed that day.** | The calendar is closed that day. |
| **That day is a holiday: Christmas.** | There is a holiday set. |
| **No free times left that day.** | It is full: use another time, overbook or another day. |
| **That date has passed.** | Pick a future date. |
| **That time is already taken. Pick another or tick "Overbook".** | Someone took that time while you were booking. |

**TIP**

You can also book from an inbox conversation with Schedule meeting: Omnifox suggests the customer's time zone from their country and leaves the message written in the chat for you to review and send.

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CHAPTER 20

# More options: class, video call, guests and links

A class with spots, a video call, outside guests and the link to the CRM.

In the appointment window, open **More options (class, video call, guests, links)**.

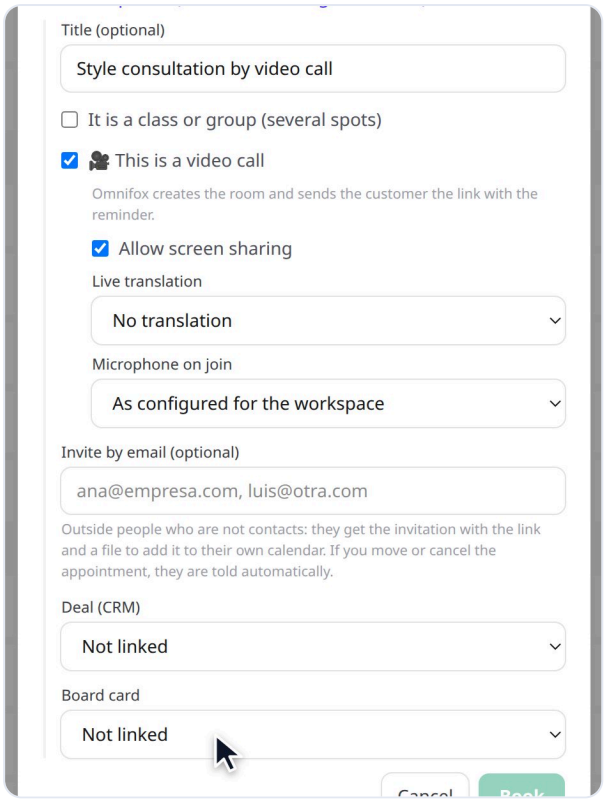
| Option | What it is for |
|---|---|
| **Title (optional)** | Its own name for the appointment, instead of “service — customer”. |
| **It is a class or group (several spots)** | Several people in the same appointment. You set the **Spots** and, if you like, **Accept a waitlist once it fills up**. In the details you see who is **Enrolled**, who is **waiting**, whether they paid (**Paid** / **Unpaid**) and you can **Remove from the list**. |
| **This is a video call** | Omnifox creates the room and sends the customer the link with the reminder (chapter 26). |
| **Invite by email (optional)** | Outside people who are not contacts: they get the invitation with the link and a file for their calendar. If you move or cancel the appointment, they are told automatically. |
| **Link to resources, deal or card** | **Resources it takes** (for example, 1 barber + 1 chair: the time is offered only if both are free), a **Deal (CRM)** or a **Board card** among the ones assigned to you. |

## Video call options

| Option | Values |
|---|---|
| **Allow screen sharing** | On or off. |
| **Live translation** | **No translation**, **Subtitles only (cheaper)** or **Translated voice + subtitles**, with the **Host language** and the **Guest language** (or **Ask when joining**). |
| **Microphone on join** | **As configured for the workspace**, **Join muted** or **Join unmuted**. |

**NOTE**

Translation uses AI credits per minute and per translated person (voice costs about 7 times more than subtitles). If your organization has translation turned off, the meeting starts without it.




More options open: title, class or group, video call with its options, email invitees, CRM deal and card.

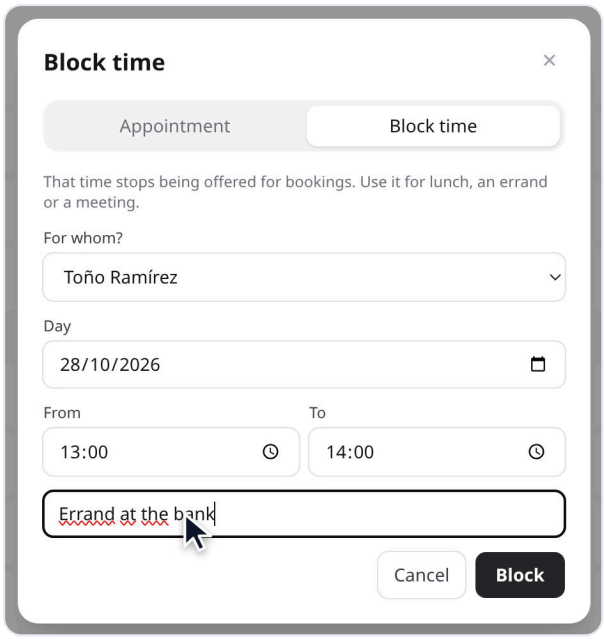
21

CHAPTER 21

# Block time

For lunch, an errand or a meeting: that time stops being offered.

1. Tap **New appointment** and switch to the **Block time** tab.
2. Choose **For whom?**: a professional, or **No specific person** for the whole calendar.
3. Pick the day, **From** and **To**, and write the **Reason**.
4. Tap **Block**: **Time blocked.** appears.

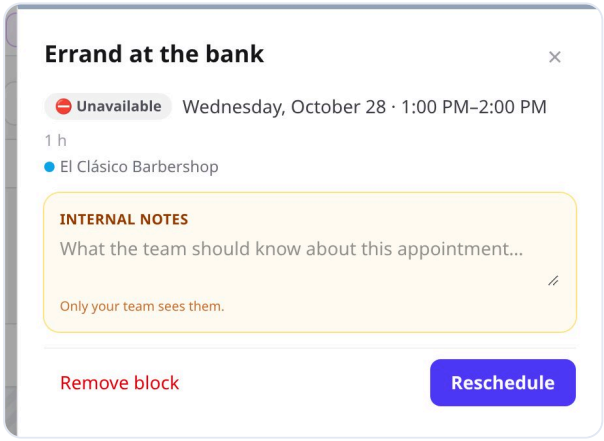



Block time: for whom, from, to and reason.

That time stops being offered on the booking page and by the AI, and in the calendar it shows as **Unavailable**.

## Remove a block

Click the block and tap **Remove block**. Omnifox asks: **Remove this block? That time will be offered for bookings again.**




A block opened, with Remove block.

> **TIP**
> For something that repeats every week (the daily lunch), it is better to put it in the resource's hours with two ranges, or as a break in Routing. Blocks are for one-off things.

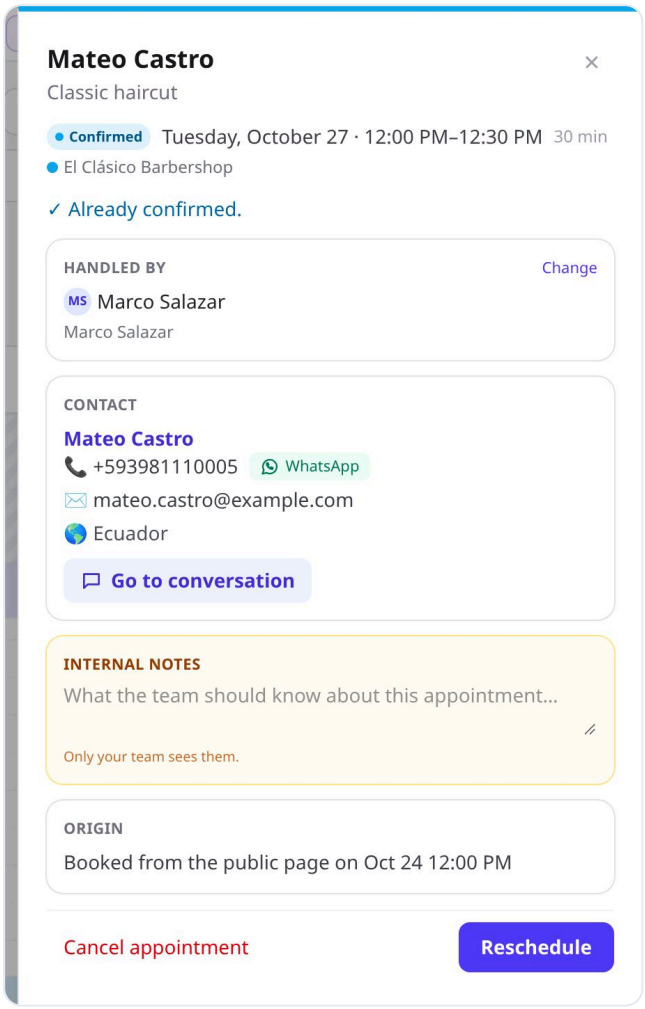
22

CHAPTER 22

# The appointment details

Everything about an appointment in one place.

One click on any appointment opens its details.




The appointment details: status, handled by, contact, internal notes and origin.

| Part | What you see and what you can do |
|---|---|
| Status | Scheduled, Confirmed, Completed, No-show or Cancelled (chapter 23). |
| Date and time | With the duration and the calendar. If the customer is in another time zone, also their local time (**10:00 in Madrid**). |
| **Handled by** | Who handles it. With **Change** you pick someone else and tap **Save**. |
| **Contact** | The customer with their phone. **Message on WhatsApp** opens the chat; **Go to conversation** takes you to their conversation in the inbox. |
| **Internal notes** | What the team should know about this appointment. The customer does not see them. |
| **Origin** | Who created it and when (table below). |
| Buttons | **Confirm**, **Showed up**, **No-show**, **Reschedule**, **Cancel appointment**. |

## The appointment's origin

| Origin | Example |
|---|---|
| Team | “Created manually by Diego Paredes on Oct 25, 10:12” |
| Booking page | “Booked from the public page on...” |
| AI | “Booked by AI agent Barbershop Front Desk via WhatsApp on...” |
| Workflow | “Created by an automation on...” |
| API | “Created via the API on...” |
| Google | “Synced from Google Calendar on...” |

23

CHAPTER 23

# Statuses: confirm, showed up and no-show

From scheduled to confirmed, and at the end: showed up or no-show.

## An appointment's life cycle

**Scheduled**
Just booked.

→

**Confirmed**
The customer confirmed (button, 1, their page or your team).

→

**Completed**
They came. Or else **No-show**.

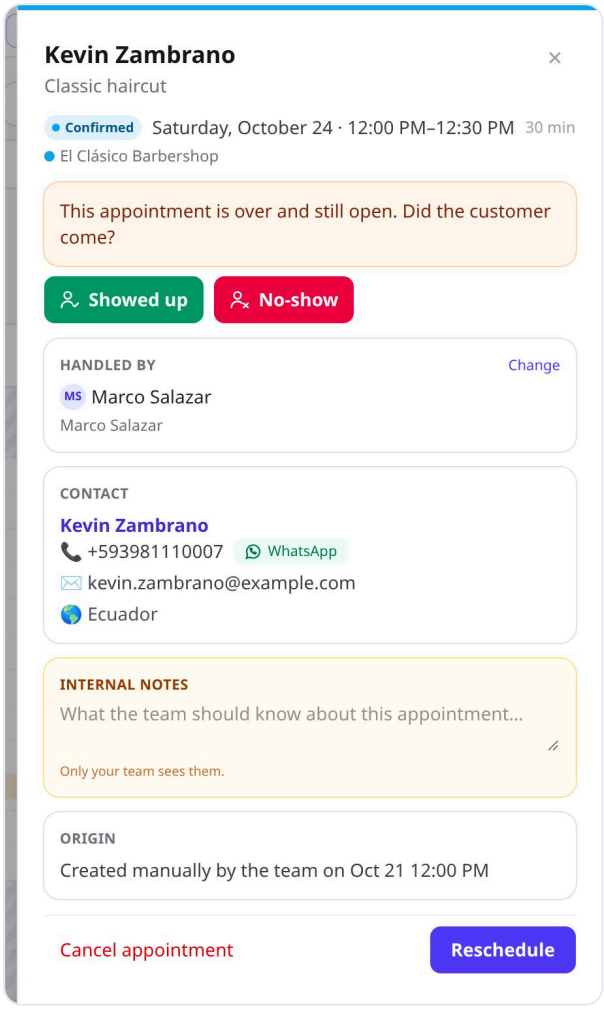
And at any time before the appointment it can become **Cancelled** (chapter 24).

## Confirm

When the customer confirms by phone or chat, open the details and tap **Confirm**: **Appointment confirmed.** appears. If the customer taps Confirm in the reminder, it confirms by itself.

## Showed up or no-show

Once the appointment is over, the details ask: **This appointment is over and still open. Did the customer come?** Tap **Showed up** or **No-show**. If you got it wrong, fix it with one click: **Correct: they did come** or **Correct: didn't come**.




A past appointment: did the customer come?

**TIP**

Marking who came and who did not keeps the calendar clean and feeds the no-show reports. It also drives the “Block after N no-shows” policy.

# 24

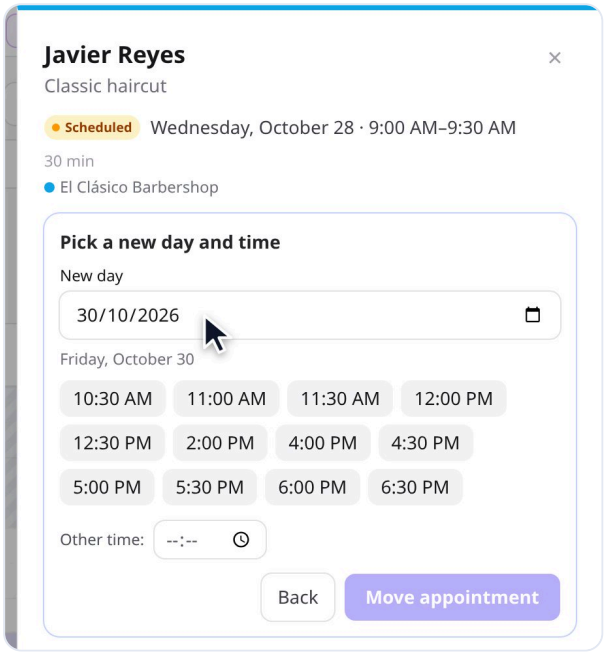
CHAPTER 24

# Reschedule and cancel

Change the time or cancel, with a notice to the customer.

## Reschedule

1. In the details, tap **Reschedule** (**Pick a new day and time**).
2. Pick the **New day** and one of the free times.
3. Tap **Move appointment**: **Appointment rescheduled.** appears.

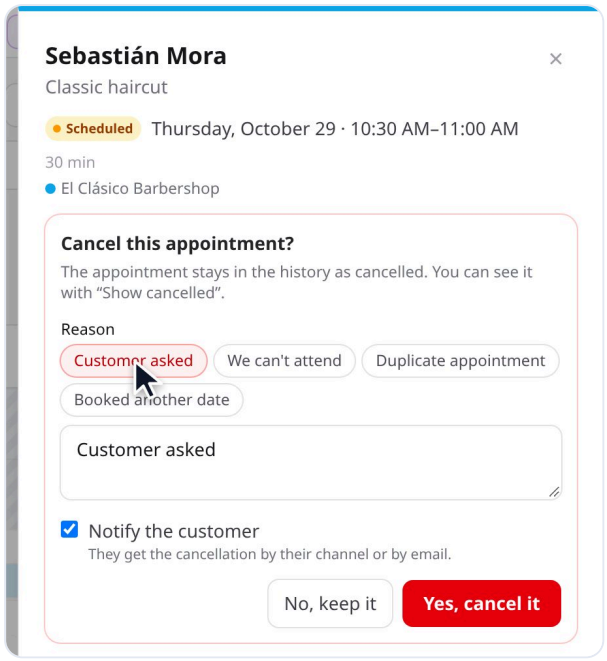



Reschedule: new day and free times.

Everything is kept (service, notes, video room, guests) and the customer gets the time-change notice.

## Cancel

1. In the details, tap **Cancel appointment** (**Cancel this appointment?**).
2. Pick the **Reason**: **Customer asked**, **We can't attend**, **Duplicate appointment** or **Booked another date**. Or write your own.
3. Decide whether to **Notify the customer** (they get the cancellation by their channel or by email).
4. Tap **Yes, cancel it**. To back out, **No, keep it**.




Cancel with a reason and a notice to the customer.

The appointment stays in the history as cancelled, with its reason. You can see it with **Show cancelled**. If there were people on the waitlist for that day, they are told about the open slot (chapter 28).

> **NOTE**
>
> If the appointment has no customer phone or email, Omnifox cannot notify them: the checkbox says so.

# 25

CHAPTER 25

# Quick actions and appointments to close

The everyday stuff without opening the details, and a calendar that is always closed out.

## On hover

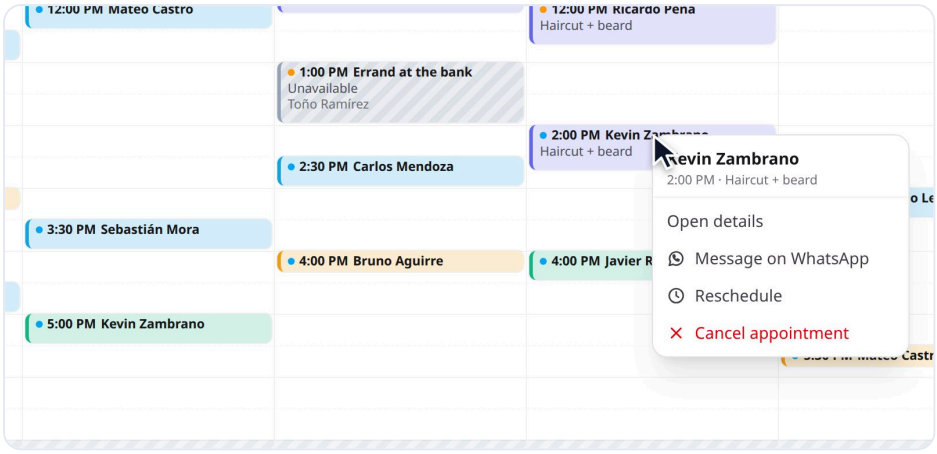
In the **Agenda** view, hovering over an appointment shows the quick actions: **Confirm**, **Message on WhatsApp**, **Reschedule** and **Cancel appointment**.




Quick actions when hovering over an appointment.

## Right-click

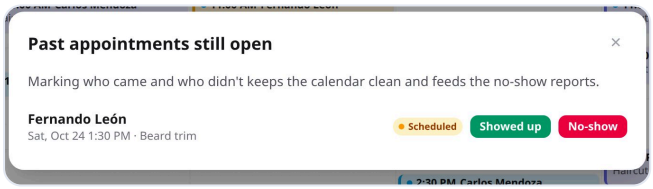
In any view, right-clicking an appointment opens a menu with **Open details**, **Message on WhatsApp**, **Reschedule** and **Cancel appointment**; depending on the appointment's status you also get **Confirm**, **Showed up**, **No-show** or **Go to conversation**.



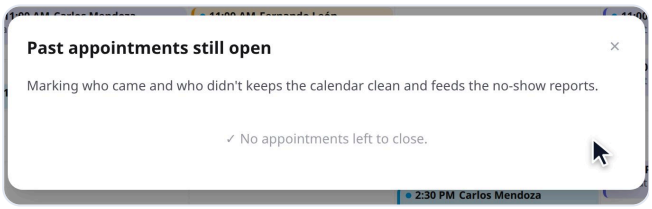

The right-click menu.

## Past appointments still open

1. Tap **Review** in the orange notice on top.
2. **Past appointments still open** opens with the ones left pending.
3. Mark each one as **Showed up** or **No-show**. When you are done it says **No appointments left to close.**




Past appointments not closed.




Marked one by one.

> **NOTE**
> If nobody closes them, they close themselves as completed after the hours you chose in Notices (chapter 11).

# 26

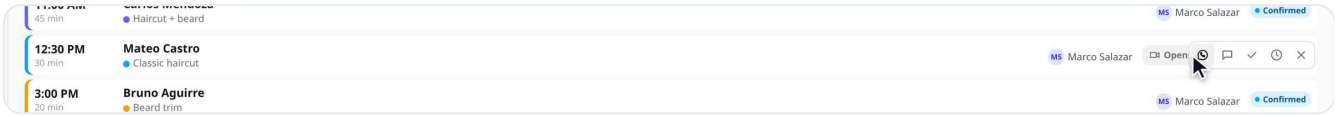
CHAPTER 26

# Video call appointments

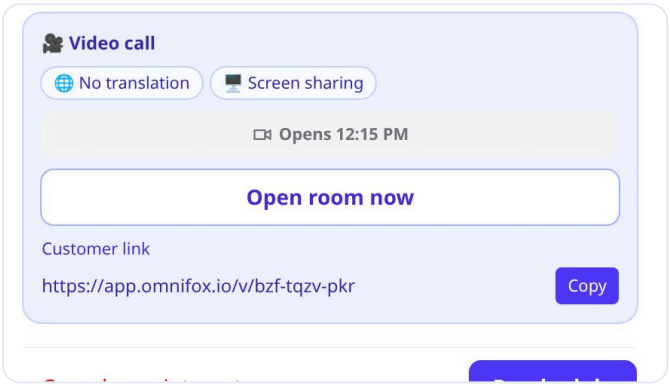
The appointment is the meeting: the room is created by itself.

A video call appointment (a service with the **Omnifox video call** mode, or marked **This is a video call**) has the video button in the calendar.

| Moment | What happens |
|---|---|
| Before the time | The button says when the room opens (**Opens 12:15**); the details say **The room opens at 12:15.** |
| 15 minutes before | The room opens: the button changes to **Join**. |
| If you want to start earlier | In the details, **Open room now**: Omnifox lets the customer know they can join. |




The video button: Opens HH:MM.




Customer link and Open room now.

The details have the **Customer link**, to copy it if needed. The customer gets it in the confirmation and in the reminder. When rescheduling, the same room and the same link are kept.

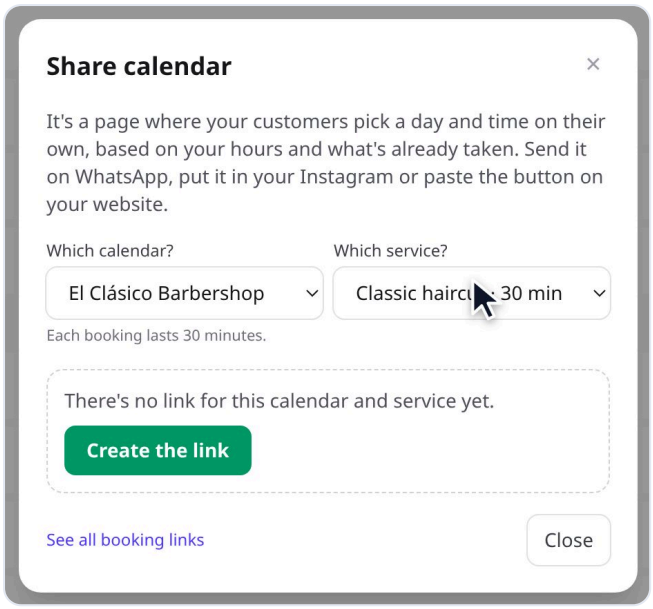
> **NOTE**
> If Omnifox could not reach the customer on their channel, you will see “Copy the link and send it yourself.” Video calls with customers are a separate add-on; if it is not active, the appointment says it has no room yet.

CHAPTER 27

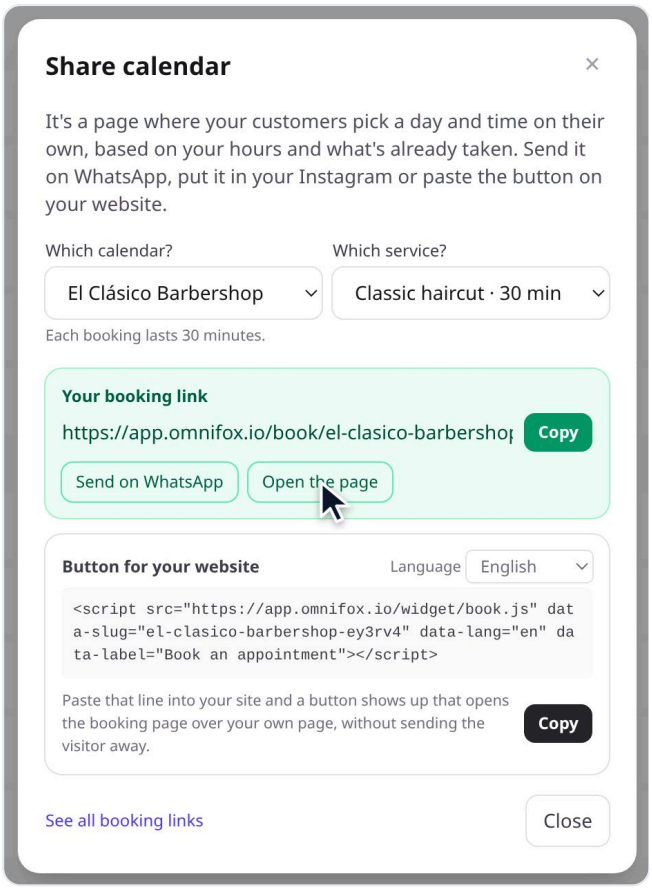
# 27 Share your calendar and the button for your website

A link so your customers book on their own, and a button inside your website.

1. Top right, tap **Share calendar**.
2. Pick **Which calendar?** and **Which service?** (each booking lasts as long as the service; with no service, 30-minute blocks).
3. Tap **Create the link**.
4. Use **Copy**, **Send on WhatsApp** (“Book your appointment here: …”) or **Open the page**.




Share calendar: which calendar and which service.

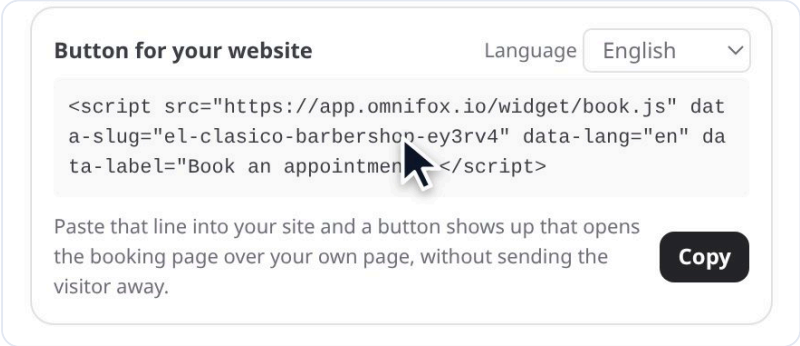



The link created: copy, WhatsApp or open.

> **TIP**
> Sharing it again does not create another one: “It’s the same link as always”. You can paste it in your Instagram, your Google profile or your messages.

## The button for your website

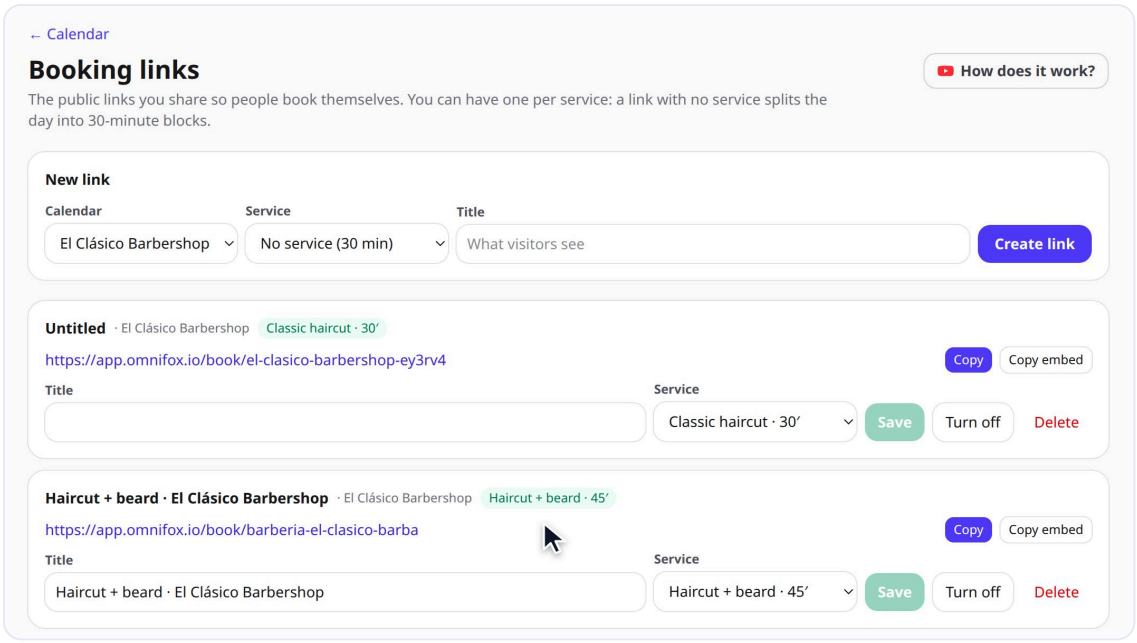
Further down, in **Button for your website**, you pick the button's **Language** (**Agendar una cita**, **Book an appointment** or **Agendar um horário**), copy that line of code ( `<script …>` ) and paste it into your site. A button appears that opens the booking page over your own page, without sending the visitor away.




The button for your website, with its language and code.

## Booking links

All your links are in **Manage** → **Booking links** (or **See all booking links**).




Manage → Booking links.

| Action | How |
|---|---|
| Create one per service | **New link**: pick **Calendar**, **Service** and the **Title** visitors see; tap **Create link**. |
| Share | **Copy** the address or **Copy embed** for your website. |
| Pause | **Turn off** (and **Turn on** to resume). A link that is off takes no bookings. |
| Delete | **Delete**: anyone with the link will get an error. |

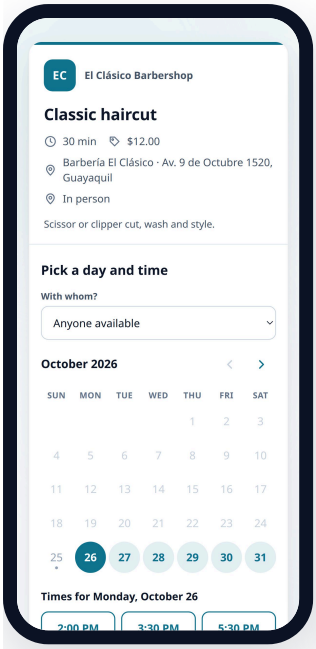
# 28

CHAPTER 28

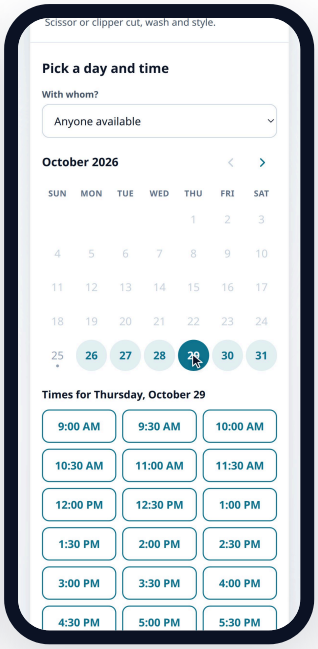
# The booking page and the waitlist

What your customer sees when booking, and what happens if the day is full.

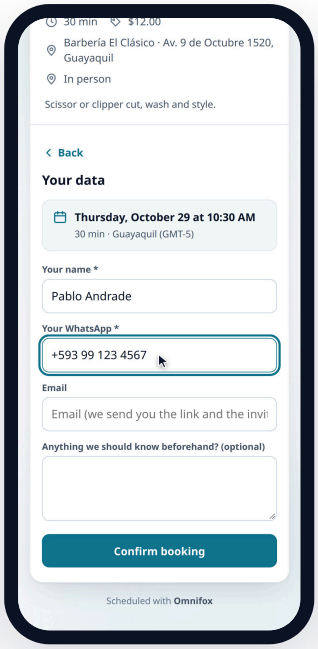
This is how your customer sees the booking page (**/book/...**) on their phone: your brand, the service, the duration, the price and the address.



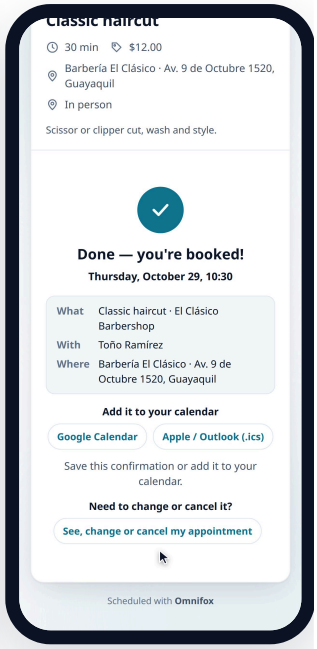

The service and who with.




The day's free times.




Name and WhatsApp.




Done! With Add it to your calendar.

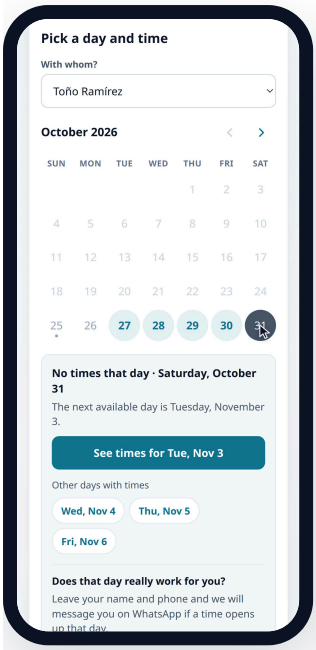
1. Pick **who with** (Marco, Toño or **Anyone available**) and, if there are sites, where.
2. Tap a day: only free times appear, in their own time zone.
3. Pick a time, type their name and their WhatsApp with country code (and their email, if they want), add an optional note for the business and confirm the booking.
4. They see the summary (**What**, **When**, **With**, **Where**) and can **Add it to your calendar**: **Google Calendar** or **Apple / Outlook (.ics)**, plus a button to view, change or cancel the appointment.

They get the confirmation on WhatsApp (and by email, if they left one), and the appointment goes into your calendar on its own with the origin “Booked from the public page”.

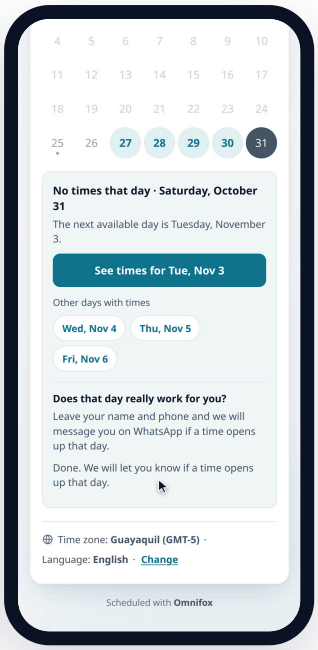
> **NOTE**
>
> To prevent abuse, if someone makes several bookings in a row with the same phone, the page asks them to message you. The service policies (notice, max ahead, active appointments, no-shows) apply here.

## Waitlist: “Let me know if one opens”

If the day they want is already full, the page suggests the next day with times and, if the service has the waitlist on, offers: **Does that day really work for you?** They leave their name and phone and tap **Let me know if one opens**.




A full day.




Let me know if one opens.

| Step | What happens |
|---|---|
| 1 | The customer is on the list for that day. |
| 2 | If someone cancels or moves an appointment that day, the **first 3** on the list get a notice on WhatsApp (**Waitlist** template) or by email, with the booking link. |
| 3 | The first one to book gets the time. |

Besides the page, the AI (chapter 31) and your team can add customers to the list. You see it in **Reports** → **Waitlist** (chapter 33).

29

CHAPTER 29

# What the customer gets: confirm, move or cancel

The WhatsApp messages and their appointment page, with no password.

## On WhatsApp

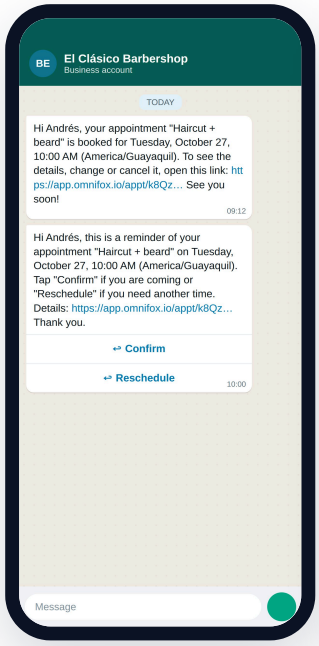
**CONFIRMATION**

Hi Andrés, your appointment "Haircut + beard" is booked for Tuesday, October 27, 10:00 AM (America/Guayaquil). To see the details, change or cancel it, open this link: https://app.omnifox.io/appt/k8Qz... See you soon!

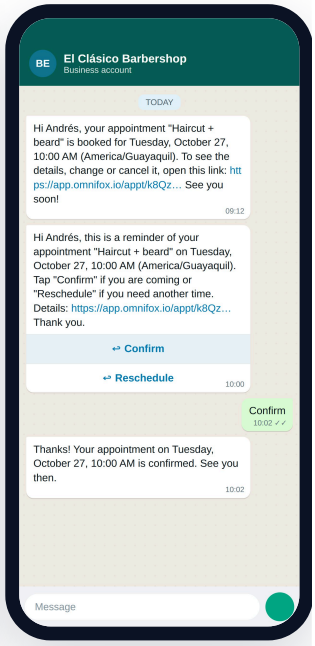
**REMINDER, 24 H BEFORE**

Hi Andrés, this is a reminder of your appointment "Haircut + beard" on Tuesday, October 27, 10:00 AM (America/Guayaquil). Tap "Confirm" if you are coming or "Reschedule" if you need another time. Details: https://app.omnifox.io/appt/k8Qz... Thank you.

↩ Confirm ↩ Reschedule




The reminder with buttons.

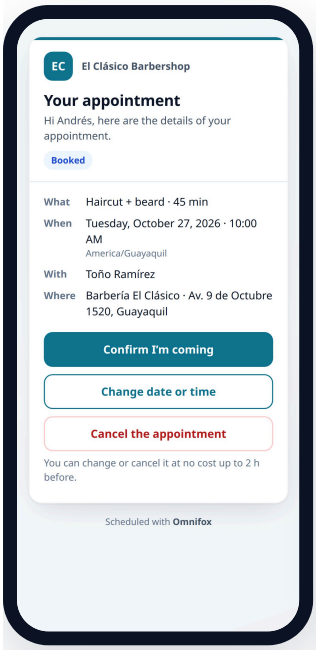



Tapped Confirm.

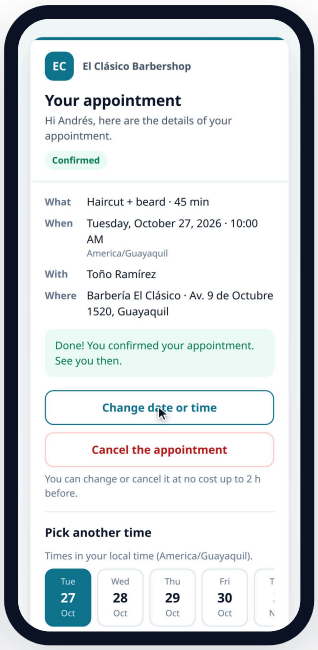
| The customer… | Automatic reply | In your calendar |
|---|---|---|
| Taps **Confirm** or replies **1** | "Thank you! Your appointment on… is confirmed. See you then." | Becomes **Confirmed**. |
| Taps **Reschedule** or replies **2** | "Sure. Pick another time here: (link) — or write us the day and time that work for you." | No change until they pick. |
| Replies about an appointment already cancelled | "That appointment is no longer active. If you want to book another one, write to us." | — |

## Their appointment page (/appt)

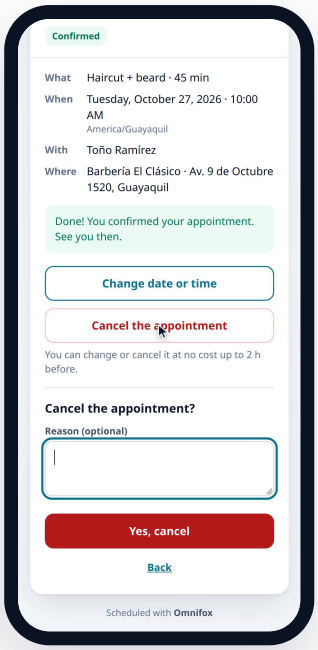
The link opens the **Your appointment** page, with your brand and no password: "Hi Andrés, here are the details of your appointment", with **What**, **When**, **Where**, **With** (and **Video call**, if it applies).




Their appointment page.




Change date or time.




Cancel the appointment.

| Button | What it does |
|---|---|
| **Confirm I'm coming** | Confirms the appointment. |
| **Change date or time** | **Pick another time**: a free day and time. |
| **Cancel the appointment** | With **Reason (optional)** and **Yes, cancel**. |

## The cancellation deadline

With the service's **Cancellation deadline (h)** (chapter 14):

| When | What the customer sees | What happens |
|---|---|---|
| Before the deadline | "You can change or cancel it at no cost up to 4 h before." | They do it themselves; the business is notified. |
| After the deadline, when moving | "The window to change or cancel at no cost has passed... If you need to change it, write to us." | They cannot move it from the page. |
| After the deadline, when cancelling | "If you cancel anyway, the business may apply a charge." | If they cancel, it is marked as a **late cancellation**. |

> **NOTE**
>
> Everything the customer does from their page shows up instantly in your calendar, in Team (if you turned it on) and in the reports.

30

CHAPTER 30

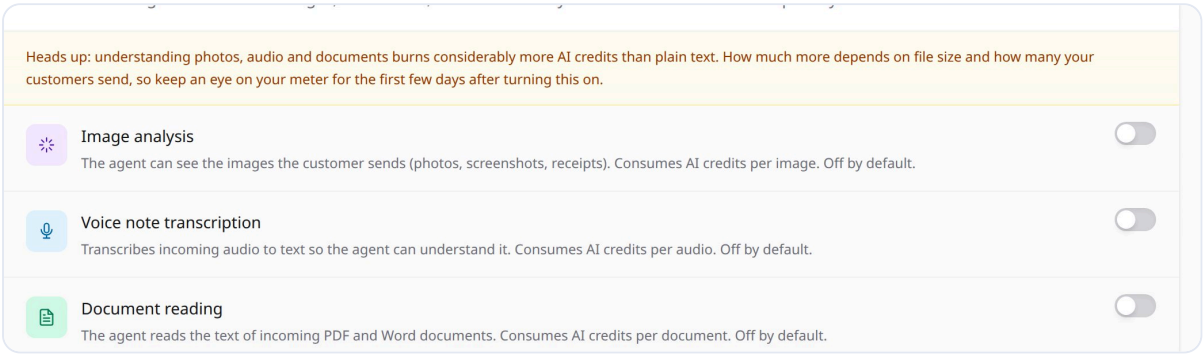
# The AI that books: tools and instructions

An agent that answers on WhatsApp, Instagram or your website chat and really books.

In **AI agents**, open your agent (in the example, **Barbershop Front Desk**). To book, it needs two things: the scheduling tools switched on and good instructions.

## Tools

In the **Tools** tab, switch on the scheduling ones:




The scheduling tools switched on in the agent.

| Tool | What it does | Technical name |
|---|---|---|
| **Check appointment availability** | Sees the real free times for a service, a day and, if asked, a professional. | `check_availability` |
| **Book appointment** | Books the appointment with the conversation's contact. | `book_appointment` |
| **View, move or cancel the customer's appointment** | Manages existing appointments. Actions: `list` (see their appointments), `confirm`, `reschedule` (move), `cancel` and `waitlist` (add to the waitlist). | `manage_appointment` |

The AI respects everything you set up: hours, holidays, resources, duration, notice, cancellation deadline and Google Calendar. It never offers a time that does not exist.

## Instructions

In **Instructions** you explain how to work. The essentials: check before offering times, offer two or three options, book only when the customer confirms, ask before cancelling and never make up times or prices. This is the barbershop's full example:

```
You are the chat front desk of El Clásico Barbershop in Guayaquil. Reply in English, short and
friendly.

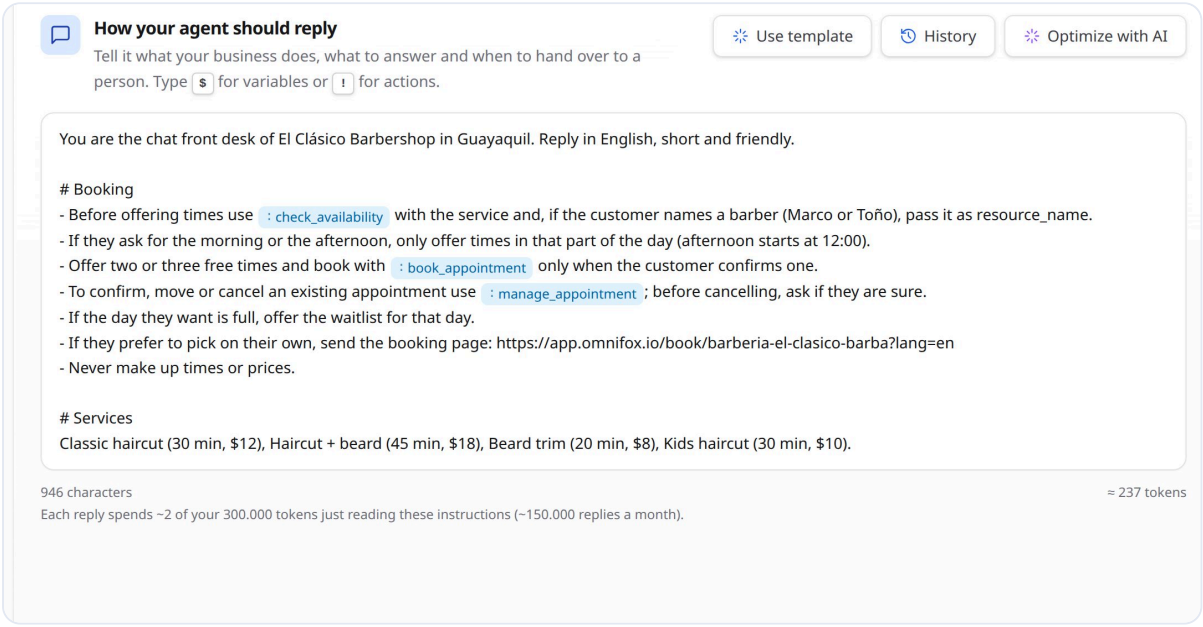
# Booking
```

```
- Before offering times use !check_availability with the service and, if the customer names a barber
(Marco or Toño), pass it as resource_name.
- If they ask for the morning or the afternoon, only offer times in that part of the day (afternoon
starts at 12:00).
- Offer two or three free times and book with !book_appointment only when the customer confirms one.
- To confirm, move or cancel an existing appointment use !manage_appointment; before cancelling, ask if
they are sure.
- If the day they want is full, offer the waitlist for that day.
- If they prefer to pick on their own, send the booking page: https://app.omnifox.io/book/barberia-el-
clasico-barba?lang=en
- Never make up times or prices.

# Services
Classic haircut (30 min, $12), Haircut + beard (45 min, $18), Beard trim (20 min, $8), Kids haircut (30
min, $10).
```

**NOTE**

Words with ! (for example, !check_availability) tell the agent which tool to use. resource_name is the professional's name, exactly as it is in Resources.




The barbershop agent's instructions.

CHAPTER 31

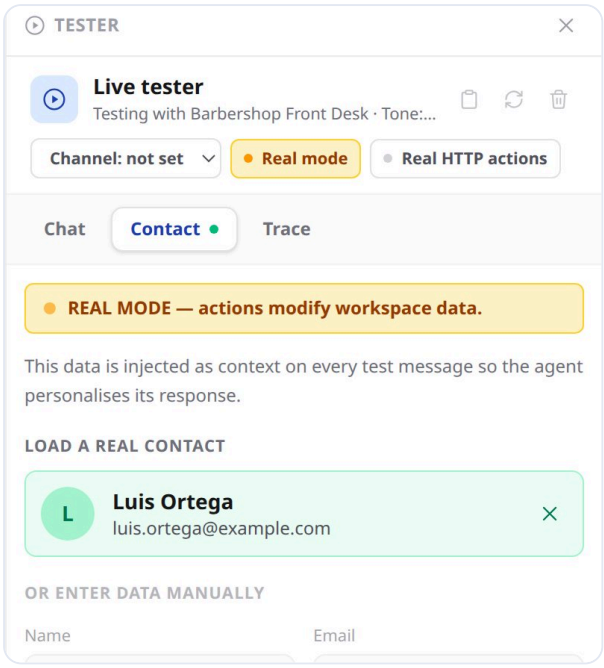
# 31 The AI in action: from chat to calendar

Test with no risk, watch the appointment appear by itself and manage appointments over chat.

## Test it in the tester

1. Open the agent's **Live tester**.
2. In the **Contact** tab, use **Load a real contact** and pick a customer (Luis Ortega).

3. Turn on **Real mode** and accept **Yes, enable real mode**: actions really happen (the **REAL MODE** banner appears). Without real mode, actions are simulated.
4. Type as if you were the customer.




The tester with a real contact and Real mode on.

## A sample conversation

Hi, I want a haircut and beard with Toño on Thursday afternoon

The AI uses Check appointment availability: Haircut + beard, Thursday, Toño Ramírez

Hi Luis! On Thursday Toño has these afternoon times: 12:00, 12:30, 13:00, 13:30, 14:00, 14:30, 15:00, 15:30, 17:00, 17:30 and 18:00. Which one works for you?

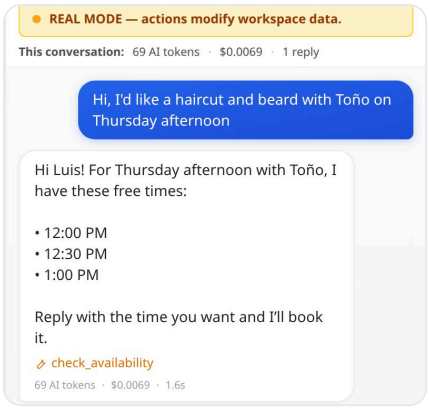
13:30 is perfect

The AI uses Book appointment

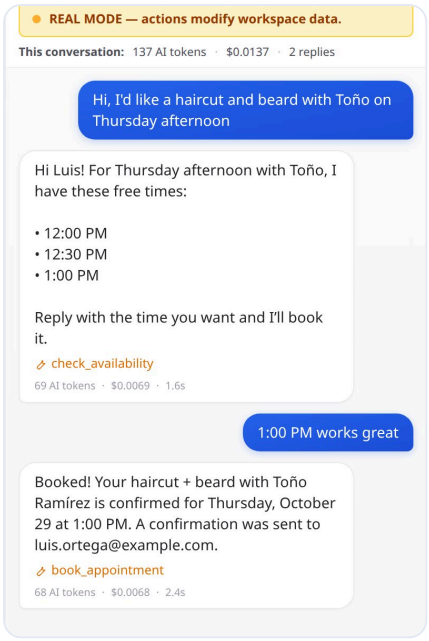
Done, Luis! I booked you a haircut + beard with Toño Ramírez for Thursday, October 29 at 13:30. The confirmation was sent to luis.ortega@example.com.

## The appointment appears by itself

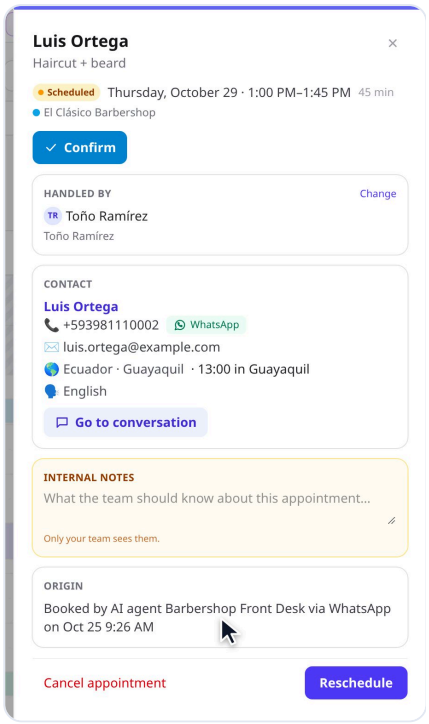
Go to the calendar: the appointment is there, with Toño, and in the details the **Origin** says **Booked by AI agent Barbershop Front Desk via...**




The AI checked Toño's schedule and offers truly free times.




Luis picks a time and the AI books the appointment (book_appointment) and confirms it.




In the calendar, the appointment record: Origin "Booked by AI agent Barbershop Front Desk via WhatsApp".

## Reschedule, cancel and waitlist over chat

Hi, it's Luis. Could you move my Thursday appointment to Friday at the same time, please?

The AI uses View, move or cancel the customer's appointment (list → reschedule) and Check appointment availability

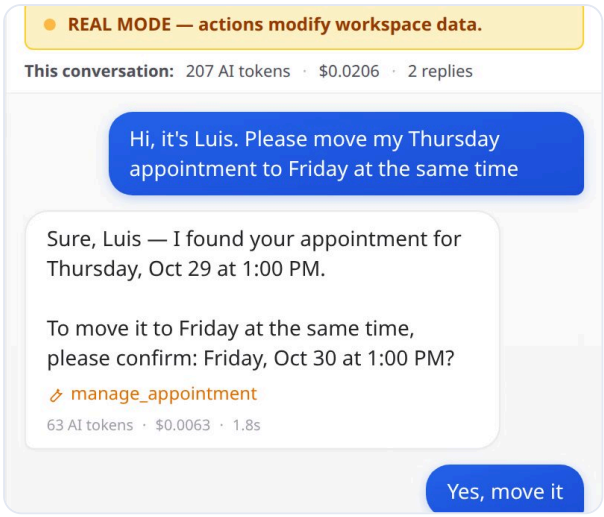
Done, Luis 👍 Your Thursday appointment was moved to Friday, October 30 at 13:30.

Actually I can't make it, please cancel it

Are you sure you want to cancel your appointment on Friday, October 30 at 13:30?

Yes

Done, your appointment is cancelled. If you want to book another one, I'm here.




The AI rescheduled the appointment over chat.

If the day they ask for is full, the AI adds them to the waitlist (the `waitlist` action). And if the customer prefers to pick on their own, it sends them the booking page link; from the inbox, your team can also send it with one click.

## Best practices

- Have it **always** check availability before offering times: never let it "guess".
- Have it confirm the service, the professional and the day before booking.
- Put the list of services with duration and price in the instructions, the same as in Services.
- Ask it to check before cancelling.
- Test in the tester (first simulated, then with Real mode and a test contact) before connecting it to your channels.

## Common mistakes

| Problem | Likely cause | Fix |
|---|---|---|
| The AI says there are no times | The service is **Hidden**, the professional does not provide it, or there are no hours set. | Check Services, Resources → Services provided and the Hours. |
| It offers times but does not book | **Book appointment** is not switched on. | Switch it on in Tools. |
| In the tester it "booked" but nothing shows up | It was in simulated mode. | Turn on **Real mode** with a real contact. |
| It cannot find the barber | The name does not match Resources. | Use the name exactly as it is in Resources. |
| It makes up prices | Prices are missing from the instructions. | Add the list of services and "Never make up times or prices". |

CHAPTER 32

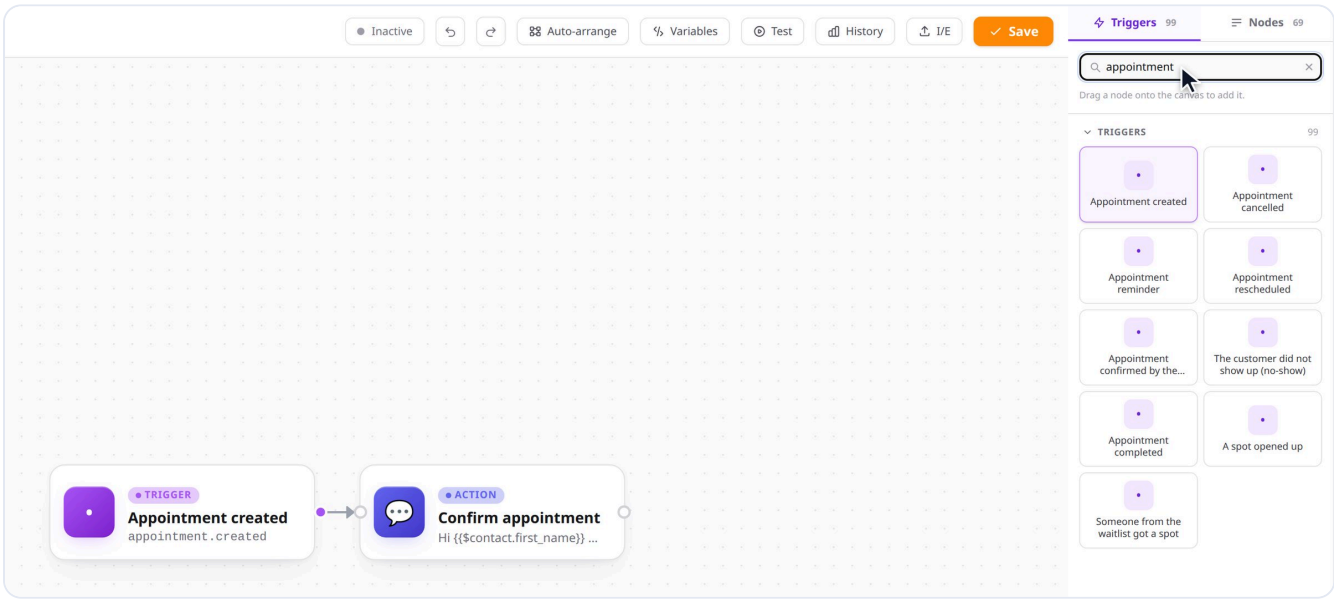
# 32 Automations with appointments

Make things happen by themselves when an appointment is booked, confirmed or cancelled.

In **Automations** (Workflows), appointments have their own triggers and nodes.

## Triggers

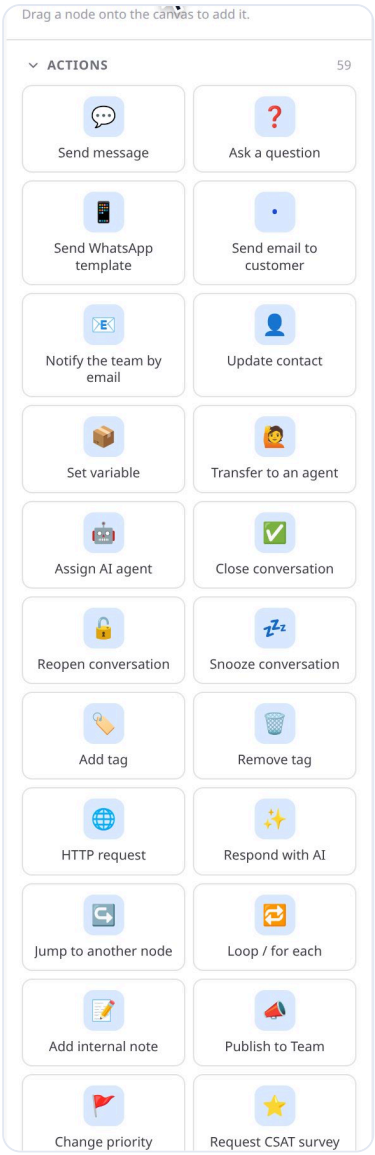
| Trigger | Fires when… |
|---|---|
| Appointment created | An appointment is booked (team, page, AI, API or workflow). |
| Appointment confirmed | The customer or the team confirms it. |
| Appointment rescheduled | Its date or time changes. |
| Appointment cancelled | It is cancelled. |
| No-show | It is marked as no-show. |
| Appointment completed | It is marked as showed up or closes itself. |
| Appointment reminder | The hours you choose are left before the appointment. |
| Slot freed | A cancellation or a change leaves a free slot. |
| Waitlist | Someone joins the waitlist. |




A workflow with the Appointment created trigger and the Confirm appointment node; on the right, the nodes found by searching “appointment”.

## Nodes

| Node | What it does |
|---|---|
| Book appointment | Creates an appointment for the contact. |
| **Confirm appointment** | Marks it as confirmed. |
| Reschedule appointment | Moves it to another date or time. |
| Cancel appointment | Cancels it. |
| Mark as no-show | Marks it as a no-show. |
| Add to waitlist | Adds the contact to the waitlist for a day. |
| **Check availability** | Gets the free times to use in the workflow. |
| **Block time in the calendar** | Blocks a time range. |
| Create card from appointment | Creates a Projects card from the appointment, with date and owner. If the appointment already had a card, no new one is created. |



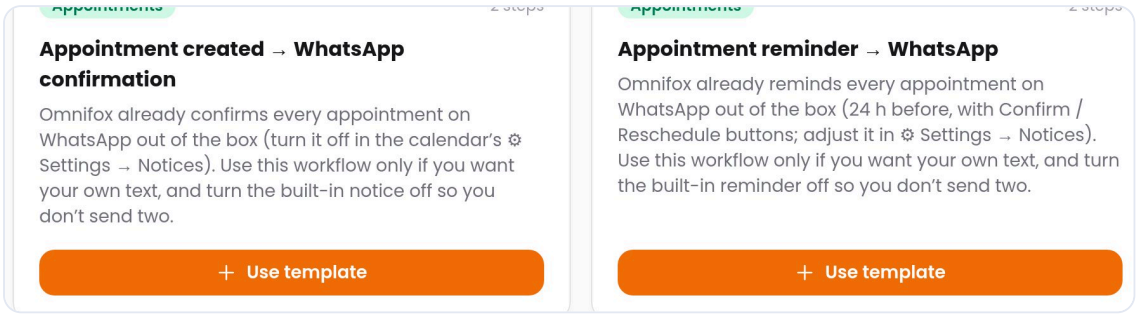

The node list with the appointment ones.

## Appointment variables

| Variable | What it gives you |
|---|---|
| `{{$appointment.when}}` | Date and time (in the customer's time, written out). |
| `{{$appointment.date}}` | Date (in the customer's time). |
| `{{$appointment.time}}` | Time (in the customer's time). |
| `{{$appointment.service}}` | Service. |
| `{{$appointment.address}}` | Address (in-person appointment). |
| `{{$appointment.manage_link}}` | Link for the customer to see, change or cancel the appointment. |
| `{{$appointment.video_link}}` | Video call link. |

## The two appointment templates

Among the Automations templates there are two for appointments so you can use **your own text**: the confirmation on booking and the reminder. For example, the reminder says: "Hi {{$contact.first_name}} 👋 This is a reminder of your {{$appointment.service}} appointment on {{$appointment.when}}. Reply 1 to confirm or 2 if you need to change it. You can also manage it here: {{$appointment.manage_link}}". When you use one, it is created turned off: review the text and switch it on.




The two appointment templates: WhatsApp confirmation and reminder.

**HEADS UP**

Omnifox already confirms and reminds every appointment out of the box. If you use these templates, turn off the built-in notice in the calendar's Settings → Notices so you do not send two messages.

## For your systems: webhooks and API

If you have another system (your website, an ERP), **webhooks** tell it about every appointment created, moved or cancelled, and the **appointments API** lets you check availability, book, move and cancel from outside. Appointments created that way show the origin "Created via the API".

# 33

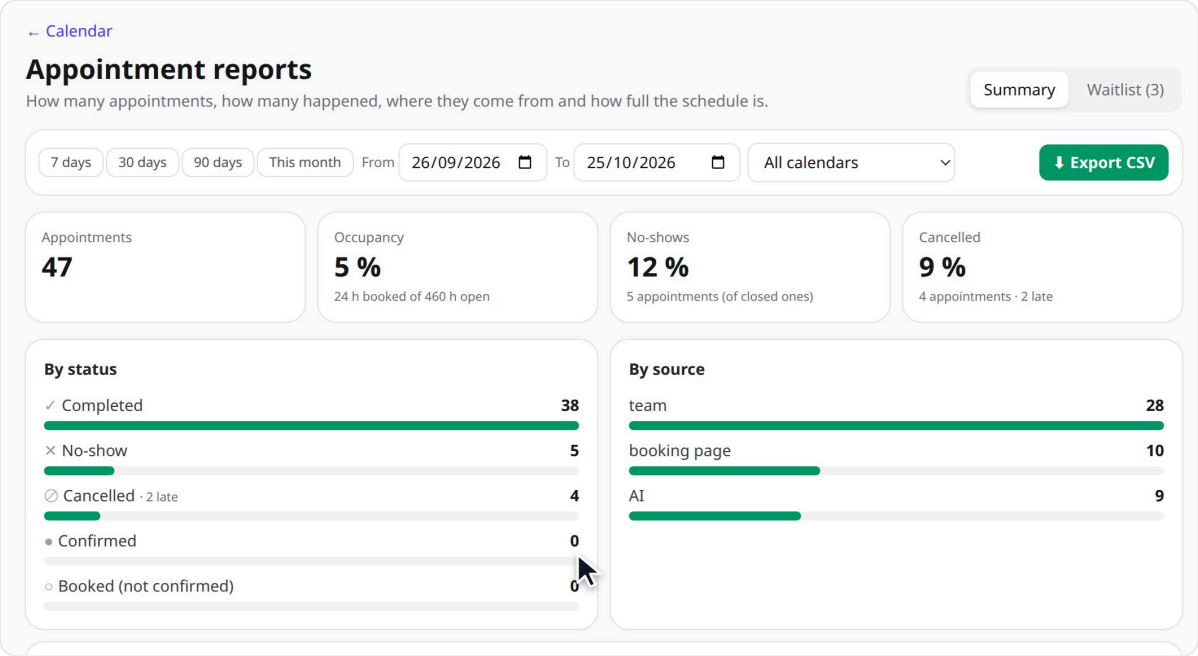
CHAPTER 33

# Reports and waitlist

How many appointments, how many happened, where they come from and how full the calendar is.

Go to **Manage** → **Reports** (**Appointment reports**).

1. Pick the range: **7 days**, **30 days**, **90 days**, **This month** or **From**/**To**.
2. Pick the **Calendar** or **All calendars**.
3. Look at the figures on top and the breakdowns below. With **Export CSV** you take it to Excel.



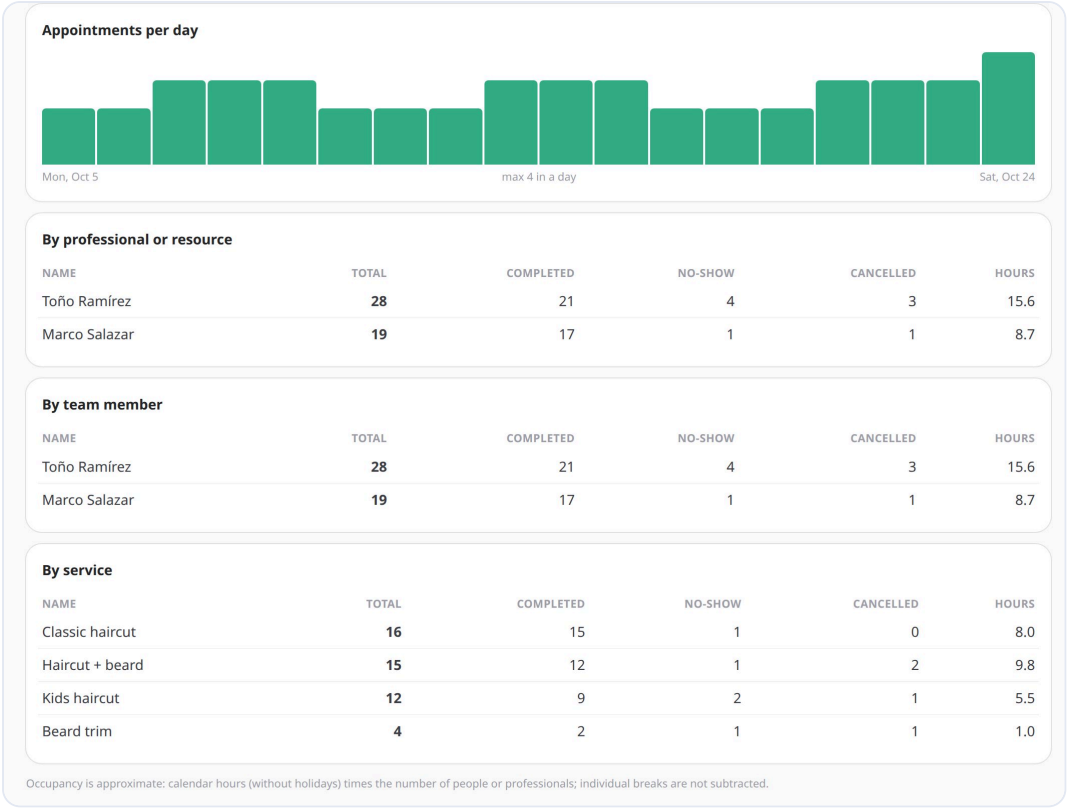

Appointment reports: range, calendar and the main figures.

| Figure | What it measures |
|---|---|
| **Appointments** | The total appointments in the range. |
| **Occupancy** | Booked hours over open hours (**24 h booked of 460 h open**). |
| **No-shows** | The share of no-shows among closed appointments. |
| **Cancelled** | How many were cancelled and how many **late**. |

> **NOTE**
>
> Occupancy is approximate: calendar hours (without holidays) times the number of people or professionals; individual breaks are not subtracted.

## The breakdowns

| Breakdown | What it is for |
|---|---|
| **By status** | Completed, No-show, Cancelled, Confirmed and Booked (not confirmed). Includes how many were auto-closed. |
| **By source** | Team, booking page, AI, API, Google, workflow: where your appointments come from. |
| **Appointments per day** | Which days fill up most (with the max in a day). |
| **By professional or resource** | Marco's and Toño's appointments and hours. |
| **By team member** | Who handles each appointment. |
| **By service** | Which services are requested most. |




Breakdowns by status, source, day, professional and service.

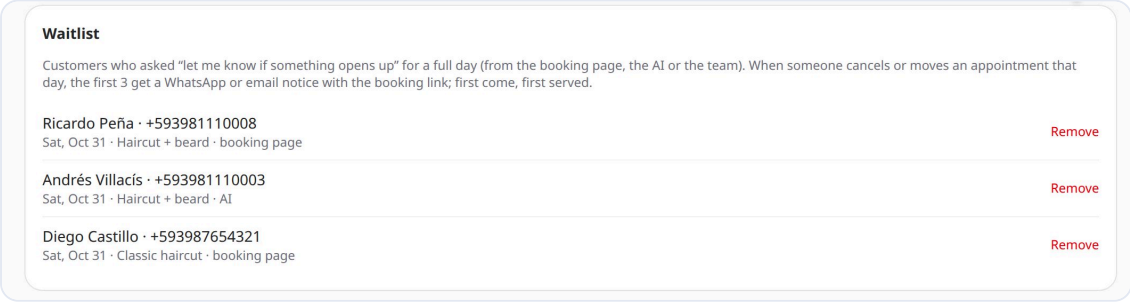
If there are past appointments not closed, the report says so, so you can mark them: that way the numbers are real.

## The CSV

It has one row per appointment with ID, date, start, end, calendar, service, professional, who handles it, customer, phone, email, status, source, late cancellation, whether it was auto-closed, cancellation reason and creation date.

## Waitlist

In the **Waitlist** tab you see who is waiting for a time, for which day and where they asked from (**booking page**, **AI**, **team** or **API**). With **Remove** you take them off the list.




The Waitlist tab.

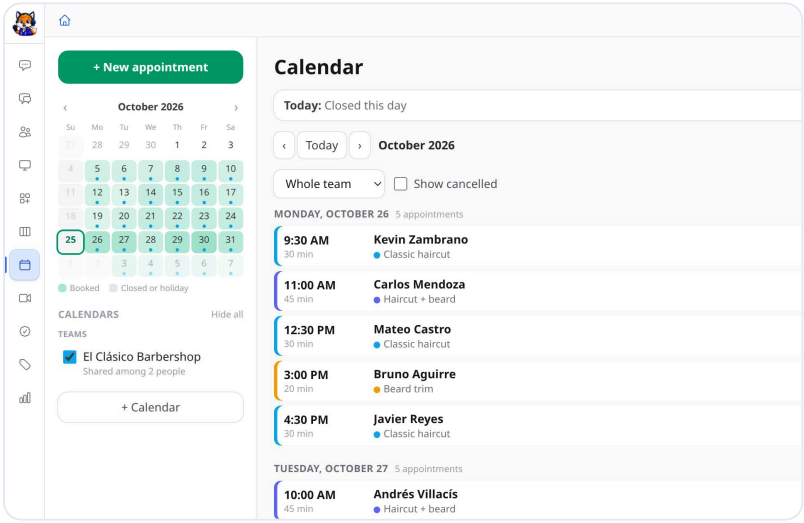
# 34

CHAPTER 34

# Permissions: agent and admin

Who can do what in the Calendar.

| Task | Agent | Admin |
|---|---|---|
| See the calendar, search, filter | ✓ | ✓ |
| Create, move, confirm and cancel appointments | ✓ | ✓ |
| Mark showed up / no-show, block time | ✓ | ✓ |
| Manage their personal calendar | ✓ | ✓ |
| Set up team calendars (hours, holidays, routing, notices) | — | ✓ |
| Services, Resources, Sites and Booking links | — | ✓ |
| Connect or disconnect Google on someone else's calendar | — | ✓ |
| Delete a calendar | Owner only | ✓ |
| Reports | Depends on permissions | ✓ |




The calendar as an agent sees it: no admin options.

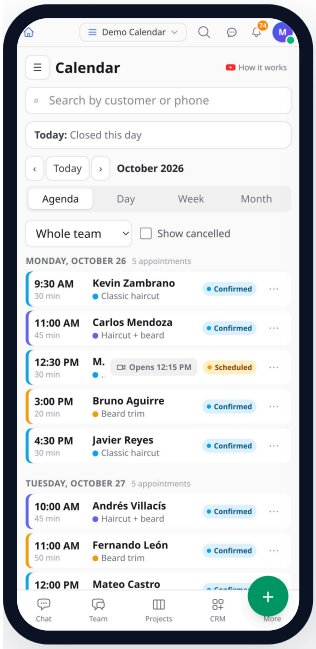
An agent does not even see the admin options: they get a clean calendar, with what they need to work. If they try something without permission, they will see **You don't have permission to do this.**

CHAPTER 35

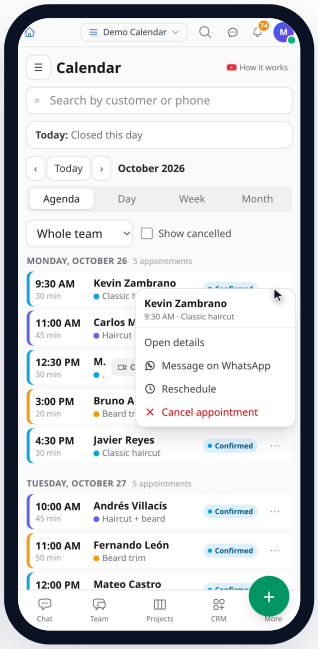
# 35 The calendar on your phone and shortcuts

Your calendar in your pocket and a few shortcuts to go faster.

The calendar works on your phone, from the browser or from the Omnifox app: the ☰ button opens the mini calendar and the calendars; the search box and the views stay on top, and each appointment with its actions menu.




The calendar on a phone.




An appointment's action menu.

On the phone, tap an appointment to open its details, or its menu for the quick actions (confirm, WhatsApp, reschedule, cancel). Professionals who do not use Omnifox have their own private link (chapter 18).

## Keyboard shortcuts

| Key | Action |
|---|---|
| **Enter** | Opens the focused appointment (selected with the keyboard). |
| **Escape** | Closes the open details or window, or cancels a drag. |
| **Escape** in the search box | Clears the search. |

# 36

CHAPTER 36

# Glossary and FAQ

## Glossary

| Term | What it is |
|---|---|
| Calendar | A schedule: for one person, a team, a room or shared. |
| Service | An appointment type, with duration, price, capacity and policies. |
| Resource | A person, space or piece of equipment that attends, with its own hours. Does not need to be a user. |
| Routing | How appointments are assigned among the people in a team calendar. |
| Exception | Time off or a day with different hours for a resource. |
| Block | A period when no bookings are offered. |
| Overbook | An appointment booked even though there is already another one at that time. |
| Buffer (before/after) | Prep minutes added to the duration. |
| Cancellation deadline | Up to how many hours before the customer can cancel or move on their own. |
| Waitlist | Customers who ask to be told if a time opens up on a full day. |
| WhatsApp template | A Meta-approved message, needed outside the 24-hour window. |
| 24-hour window | The period, from the customer's last message, in which WhatsApp lets you write freely. |
| Booking link | The public /book page for customers to book on their own. |
| Appointment link | The customer's /appt page to confirm, move or cancel. |
| Origin | Who created the appointment: team, page, AI, workflow, API or Google. |

## Frequently asked questions

### Why does a time not show up in the available times?

Check, in this order: the calendar's hours and the professional's (Resources), their exceptions and breaks, holidays, blocks, the appointments they already have (including the service's before/after minutes), minimum notice, max ahead and, if Google is connected, its busy events.

### Why is the customer not getting the WhatsApp?

The appointment may have no customer or phone, **Notify the customer on WhatsApp** may not have been ticked, the templates may not be approved (outside the 24-hour window only templates go out) or there may be no WhatsApp connected to Meta. Check the Notices tab.

### My templates say “in review”.

Meta usually approves them within minutes or hours; the status updates by itself. Meanwhile the email goes out, and WhatsApp if the conversation is open. If one comes back **rejected**, tap **Prepare templates** again or write to us.

### How do I load the year's holidays?

In Settings → **Holidays**, one by one with their name; for several days in a row use **To**. One person's holidays go in their Exceptions.

### My customers are in another country; do they see the right time?

Yes. The booking page shows times in the customer's time zone, and the messages include the time zone. In the details you also see their local time.

### Can I book a customer with no phone?

Yes, but they will not get confirmation or reminders on WhatsApp. If they have an email, they get them by email.

### How do I fit an appointment into a time that is already taken?

Tick **Overbook** in the appointment window. Use it with care: the professional will have two appointments at once.

### Can two barbers see two customers at the same time?

Yes: in a team calendar, each barber has their own column and availability. At the same time there can be one appointment with Marco and another with Toño.

### And a class with several students?

Set a **Capacity** above 1 on the service, or tick **It is a class or group (several spots)** on the appointment.

### How do I charge a deposit when booking?

Not yet: the deposit is marked **Coming soon**. For now use the cancellation deadline and the block after no-shows.

### How do I move an appointment to another barber?

Open the details and use **Change** under **Handled by**, or **Reschedule**. You cannot do it by dragging.

### The customer moved the event in their Google; does it change in Omnifox?

No. Sync with Google goes from Omnifox to Google (and Google's busy times block slots). To move it, do it in Omnifox or have the customer use their link.

### What happens to appointments nobody marked?

They close themselves as completed after the hours you chose in Notices (48 by default), and reports count them as “auto-closed”.

### Can I put booking inside my website?

Yes: in **Share calendar** → **Button for your website**, or in Booking links → **Copy embed**.

### Two confirmation messages are going out.

You probably turned on the appointment template in Automations and left the built-in notice on. Turn one of them off.

### How much do the notices cost?

Each template notice costs what Meta charges for a utility message.

### A barber has no Omnifox account; how do they see their schedule?

With their **Private link** from Resources: they see their day on the phone and mark who showed up, with no account and no password.

**Need help?**

Write to us from the **Support** button in the app or visit the help center at omnifox.io/help. If you don't use Omnifox yet, try it free for 7 days at **omnifox.io**.