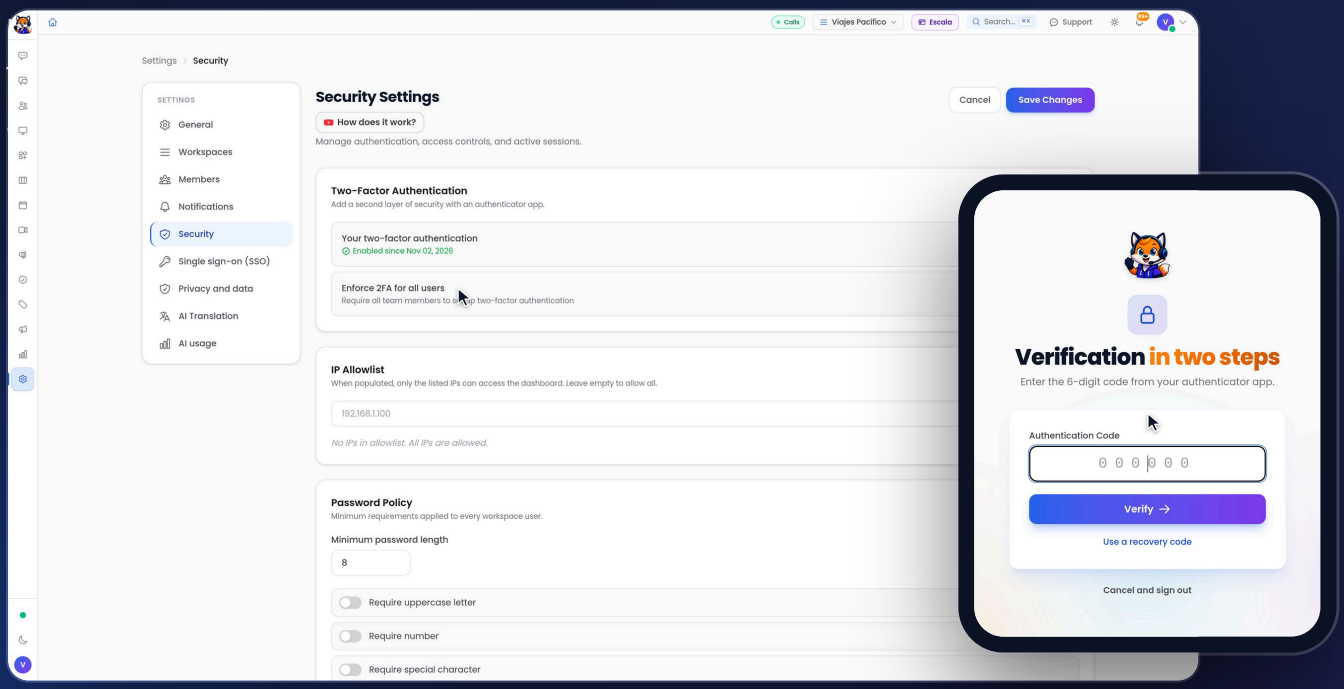
Omnifox

SETTINGS AND SECURITY · COMPLETE GUIDE

# Settings and security

How your account is organized, who gets in, what each person can do and how to protect access. The organization and its workspaces,



CONTENTS

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### How to read this manual

The screenshots are real Omnifox screens with a sample business: **Viajes Pacífico**, a fictional travel agency in Guayaquil. Its workspace has **Valeria Montes** (account owner and workspace admin) and two agents, **Diego Paredes** and **Renata Cruz**. The demo organization also has other sample workspaces used in other guides; that is why you will see long lists of workspaces and members. The people, emails and customers are made up.

The changes that affect the whole organization and were made only to show them (the password policy, the IP allowlist, Renata's role, Diego's absence, the demo account's two-factor authentication, the test team and SLA policy) **were reverted afterwards**. Anything with irreversible consequences (deleting a workspace, transferring ownership, removing someone, erasing the data) was only opened and cancelled.

Button, field and option names are in **bold**, exactly as they appear on screen (with the app in English). This manual follows, chapter by chapter, the «Settings and security · Complete guide» video and expands it with every option. For security, the screenshots do not show the QR code, the secret key or the two-factor recovery codes.


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01

CHAPTER 1

# Organization, workspace and your profile

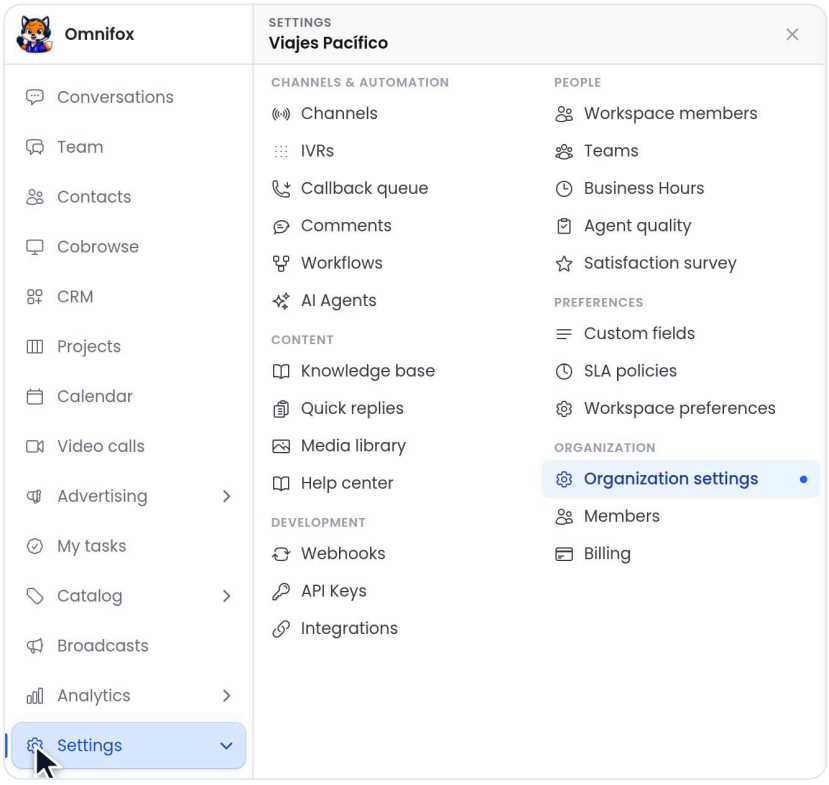
Three levels: your company, each workspace and each person.

Before touching any setting, it is worth knowing **who it affects**. In Omnifox everything lives at one of three levels:

| Level | What it is | What is configured there | Where |
|---|---|---|---|
| **Organization** | Your company: the account that pays. | The plan and billing, members and their roles, the security rules for everyone, auditing and data privacy. | **Settings** → **Organization settings** |
| **Workspace** | An area inside the organization, with its own channels, contacts, conversations and automations. | Who works there, teams, business hours, SLA, custom fields and the inbox, routing and alert preferences. | **Settings** → **People** and **Preferences** groups |
| **Your profile** | Your personal account. | Your name, language, password, two-factor authentication, sessions and notifications. | Your **avatar** menu |

Workspaces are used to separate brands, branches or departments without opening another account: for example, «Viajes Pacífico Guayaquil» and «Viajes Pacífico Quito», or «Sales» and «Support». Each workspace has its own numbers in the reports and its own inbox; one person can work in several.

## Where everything is



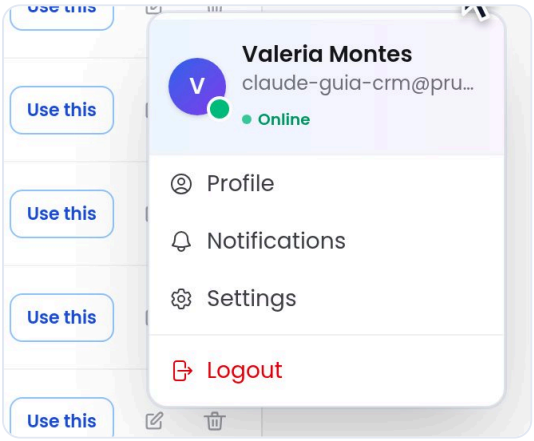

The Settings menu in the left sidebar: the workspace items (People, Preferences) and, at the bottom right, the organization items.

In the left sidebar, **Settings** opens a panel with the name of the active workspace at the top (here, **Viajes Pacífico**). Its groups are:

| Group | Options |
|---|---|
| **Channels & automation** | Channels, IVRs, Callback queue, Comments, Workflows, AI Agents (each one has its own guide). |
| **Content** | Knowledge base, Quick replies, Media library, Help center. |
| **Development** | Webhooks, API Keys, Integrations. |
| **People** | **Workspace members**, **Teams**, **Business Hours**, Agent quality, Satisfaction survey. |
| **Preferences** | **Custom fields**, **SLA policies**, **Workspace preferences**. |
| **Organization** | **Organization settings**, **Members**, **Billing**. |

**Organization settings** opens the **General Settings** page, with the organization submenu on the left: **General**, **Workspaces**, **Members**, **Notifications**, **Security**, **Single sign-on (SSO)**, **Privacy and data**, **AI Translation** and **AI usage**. Each person only sees the options their role allows them to open: an agent, for example, only sees **Notifications**.

## Your personal menu




Your avatar menu, at the top right: your Profile, your Notifications and Settings.

At the top right, your **avatar** opens your menu: your name and email, the **Online** status, and the **Profile** (chapter 30), **Notifications** (chapter 19), **Settings** and sign-out options.

What you change here only affects you: your language, light or dark theme, password or alerts do not change your teammates'.

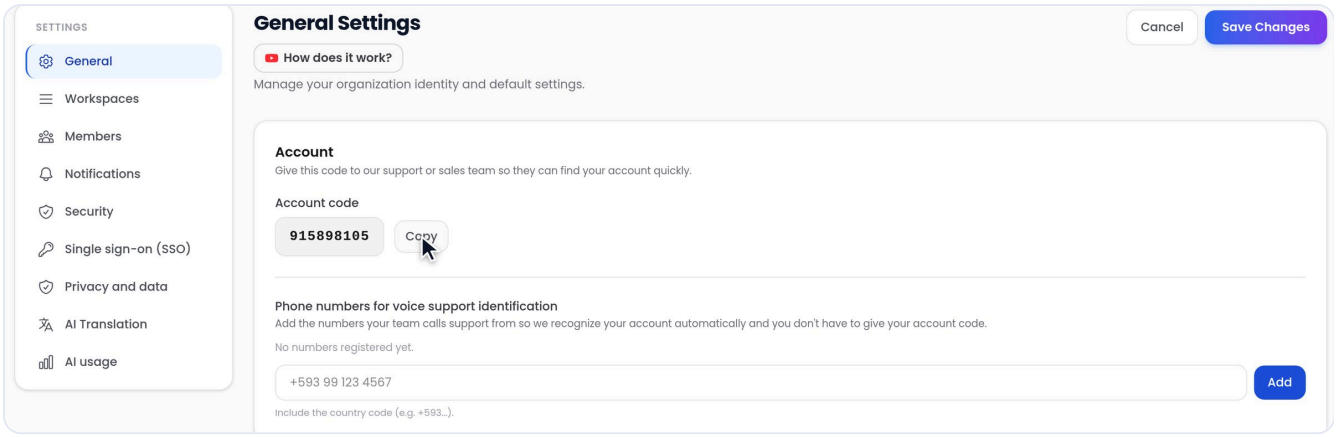
> **TIP**
> The active workspace is chosen in the top bar and is remembered per person. Before changing a workspace setting, check which name appears at the top of the Settings panel: the changes apply to that workspace.

CHAPTER 2

# 02 General organization settings

Your company record: the account code, region, contact and security.

Open **Settings** → **Organization settings**. The first page of the submenu is **General**, titled **General Settings**, with the **Cancel** and **Save Changes** buttons at the top right, which stay fixed as you scroll.

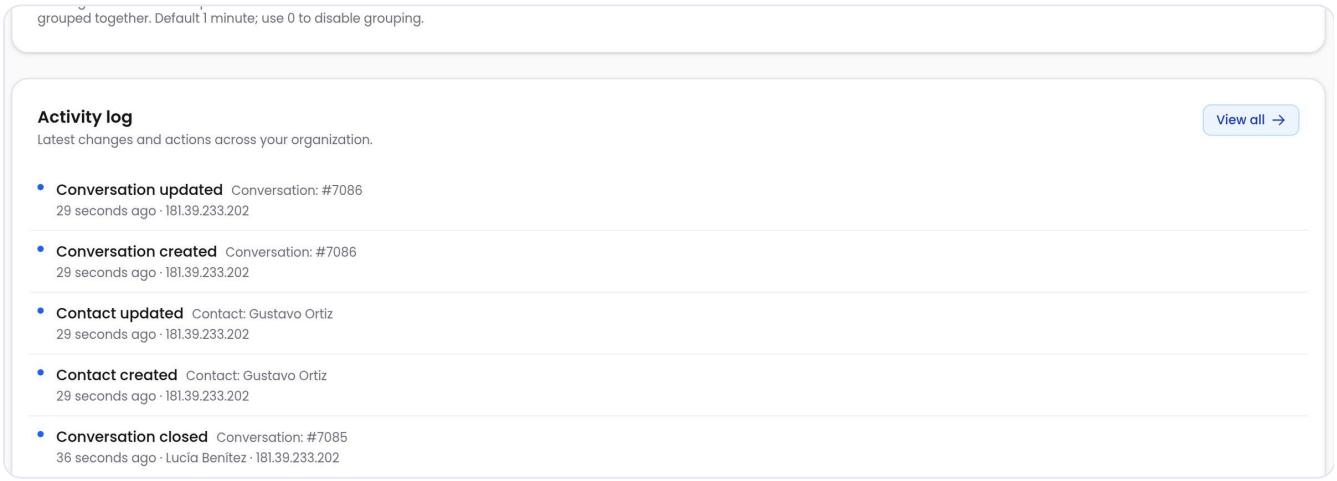



Settings → General: the organization submenu on the left and, at the top, the account code and the support phone numbers.

## Account

- **Account code**: a number created automatically (in the demo, 915898105). **Copy** puts it on the clipboard. Give it to the Omnifox support or sales team and they find your account instantly.
- **Phone numbers for voice support identification**: the numbers your team calls support from. Type one with its country code (for example, +593 99 123 4567) and click **Add**, or press Enter. When they call from one of those numbers, support recognizes your account without asking for the code. Each number has its own remove button.

## Regional and contact information



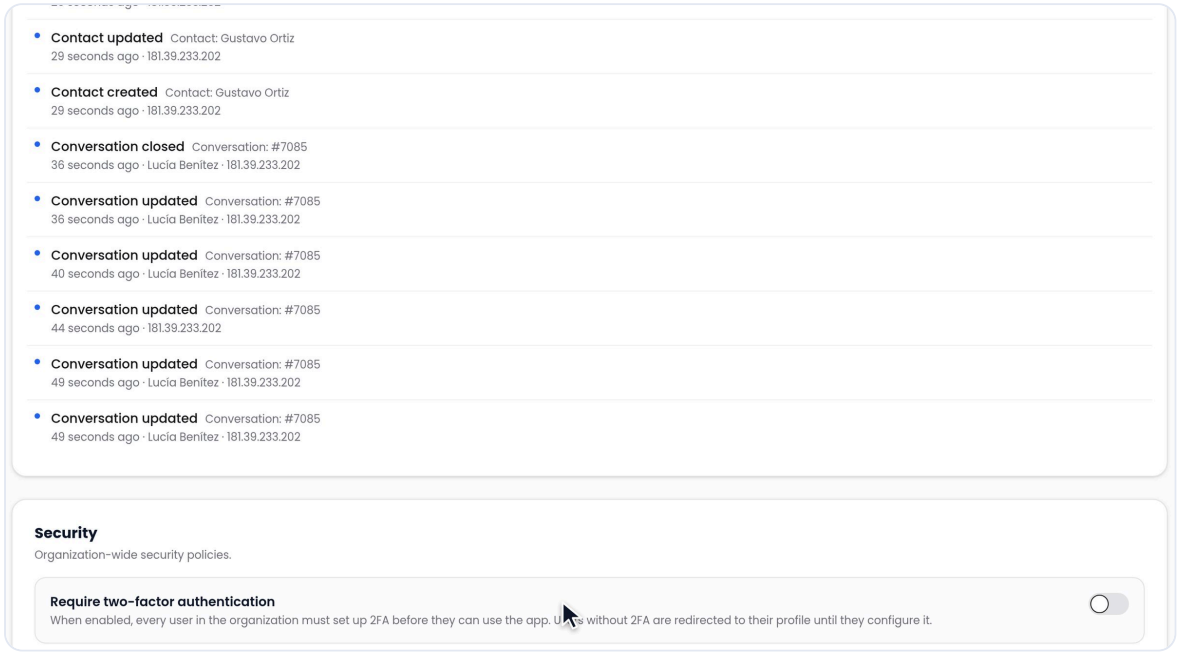

Regional (time zone and default language) and Contact Information.

| Field | What it is for |
|---|---|
| **Timezone** | A search by city, country or offset (for example, «Guayaquil, Ecuador · GMT-5»). It is the time zone of the active workspace: the same one used by the business hours (chapter 16) and the one that cuts the days in the reports. |
| **Default Language** | English, Español or Português: the language the account starts with. |
| **Contact Email**, **Contact Phone**, **Website** | The details your customers see on public channels. |

## Team, activity log and security

Further down there are three more cards:

- **Team**: group consecutive Team messages for [n] minutes, from 0 to 60 (0 = do not group). It is the team's internal chat.
- **Activity log**: the latest changes in the organization, in plain language («Conversation updated», «Team created»), with who did it, when and from which IP address. **View all** opens the full audit log (chapter 28).
- **Security**: **Require two-factor authentication**, mandatory two-factor authentication for the whole organization (chapter 22).




Further down in General: the Activity log and the Security card with mandatory two-factor authentication.

1. Change the fields you need.
2. Click **Save Changes**, at the top right. **Cancel** discards what you have not saved.

> **WATCH OUT**
>
> The two-factor authentication switch saves on its own, the moment you flip it: it does not need Save Changes. That is why you should read chapter 22 before touching it.

# 03

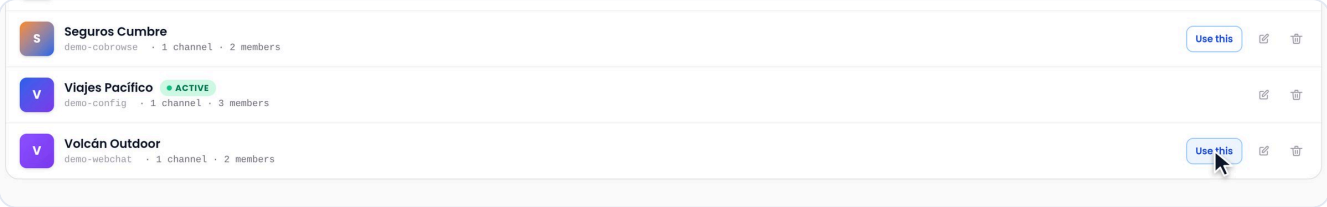
CHAPTER 3

# Workspaces

One or more workspaces to separate brands, branches or departments.

In the organization submenu, **Workspaces** shows every workspace of your organization, with the total on the right.

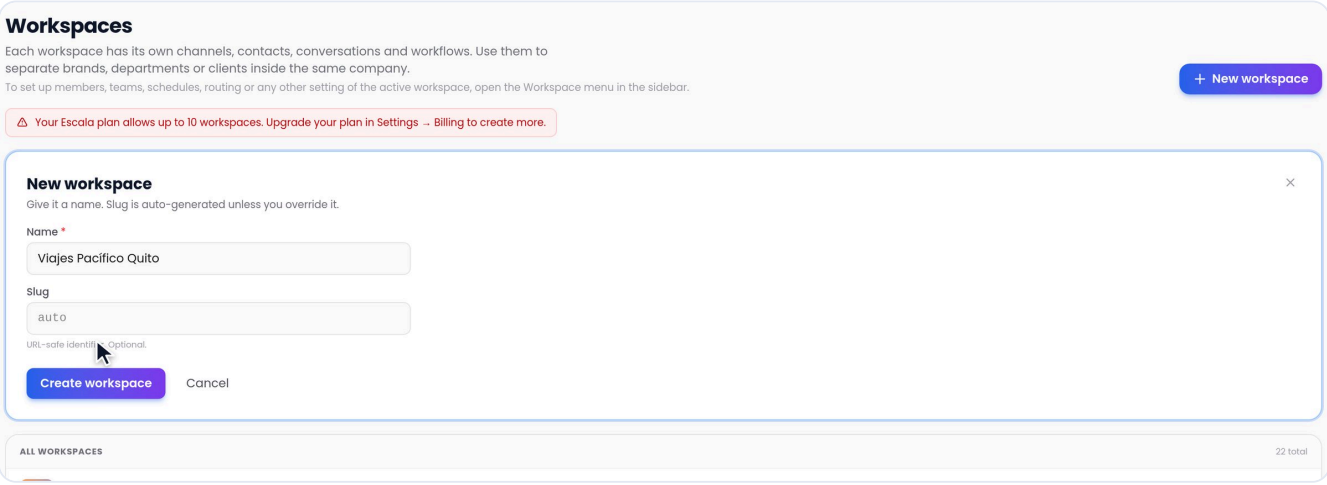
| In each row | What it is |
|---|---|
| The initial and the name | The workspace name. |
| The identifier | Below the name, in small print (for example, `demo-config`): an internal name, without spaces or accents. |
| Channels and members | How many channels and how many people it has: «1 channel · 3 members». |
| Active badge | The badge of the workspace you are working in right now. |
| **Use this** | Switches your active workspace to that one. |
| Pencil | Rename the workspace in the same row (Enter saves, Esc cancels). |
| Trash can | Delete the workspace (see below). |




The active workspace carries the active badge; the others show Use this, the rename pencil and the trash can.

## Creating a workspace

1. Click **New workspace**.
2. Type the **Name**, for example «Viajes Pacífico Quito».
3. If you want, type a **Slug** (the identifier). If you leave it on *auto*, Omnifox builds it from the name; if you type it, it normalizes it (lowercase, hyphens, no accents).
4. Click **Create workspace**. You become the admin of the new workspace.



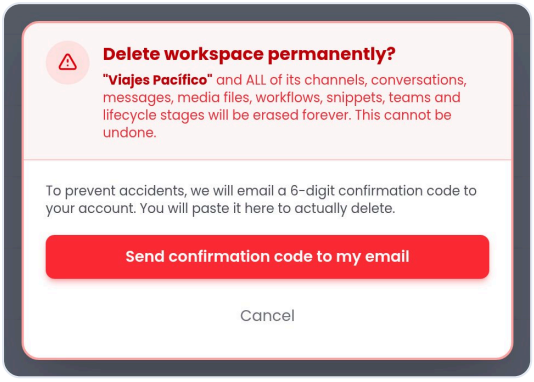

New workspace: the name and the identifier. Here the plan already reached its workspace limit and Omnifox warns in red.

Each plan allows a number of workspaces. If you already reached the limit, Omnifox tells you in red when you try to create one, with your current plan and how many it allows; to create more, change your plan in **Settings → Billing**. The owner and organization admins can create and delete workspaces; that workspace's admin

can also rename it.

## Deleting a workspace

Deleting a workspace is **permanent**: it erases its channels, conversations, messages, media files, workflows, quick replies, teams and stages forever. That is why it takes two steps:




Deleting a workspace asks for a six-digit code sent to your email.

1. Click the workspace trash can. **Delete workspace permanently?** appears.
2. Click **Send confirmation code to my email**. A six-digit code arrives, valid for 10 minutes.
3. Type the code and confirm the deletion. If it did not arrive, use **Resend code**.

- You cannot delete the organization's only workspace.
- In the demo we only open the dialog and click **Cancel**.

> **WATCH OUT**
> Before deleting a workspace, export whatever you want to keep. There is no recycle bin and no way to recover it.

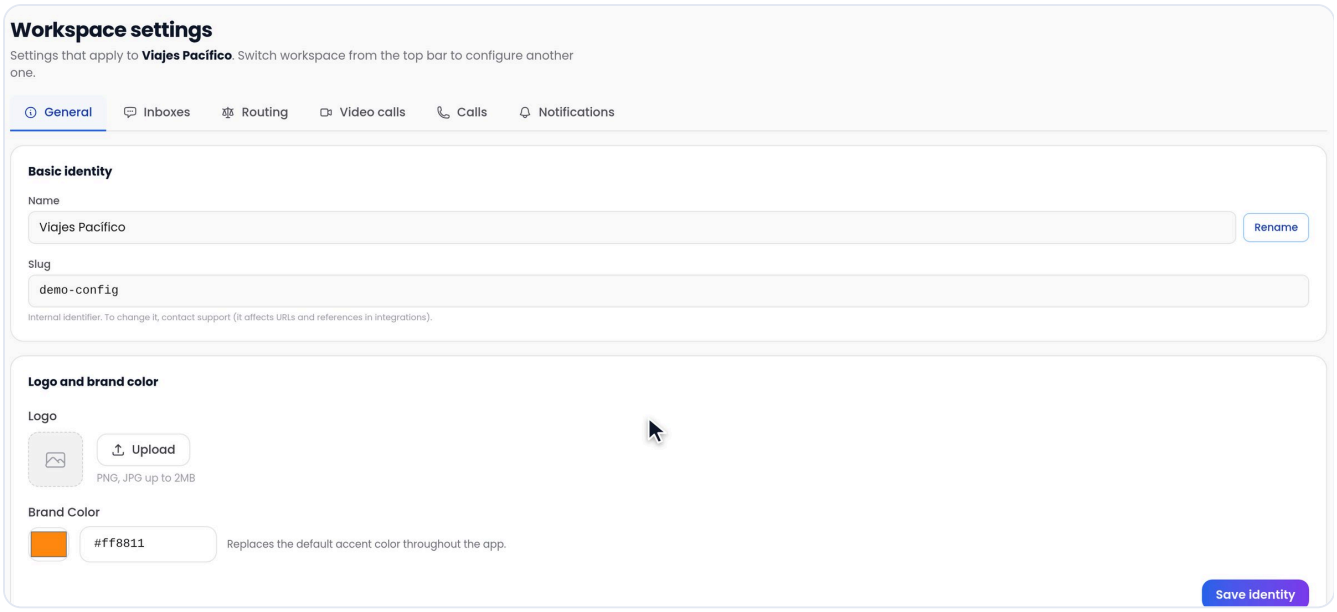
# 04

CHAPTER 4

# Workspace settings: identity and country

Each workspace has its own name, color and rules.

Each workspace's settings open from **Settings** → **Preferences** → **Workspace preferences**. The top says which workspace they apply to and below there are six tabs: **General**, **Inboxes**, **Routing**, **Video calls**, **Calls** and **Notifications**. Each block has its own save button.



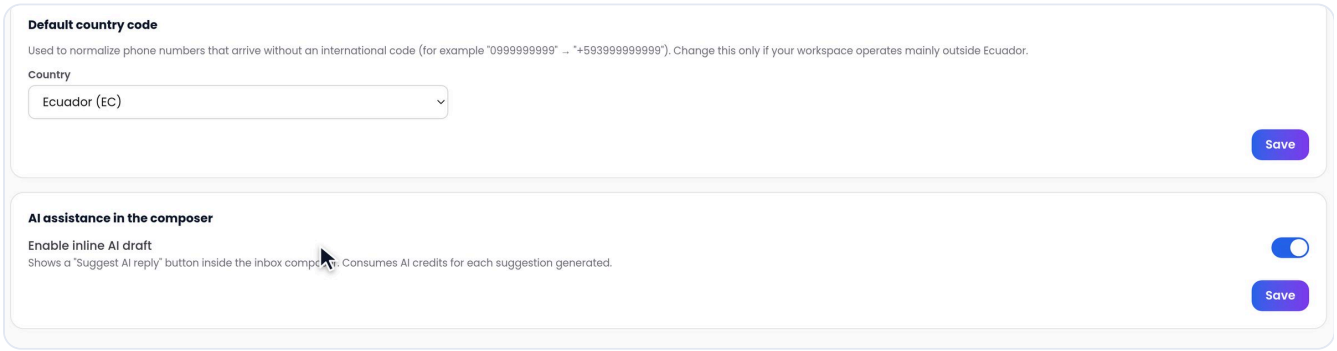

Workspace settings, General tab: basic identity, logo and brand color.

## Basic identity

- **Name**: **Rename** changes it right away.
- **Slug**: the internal identifier, read-only. To change it you have to ask support, because it affects addresses and references in integrations.

## Logo and brand color

- **Logo**: **Upload** a PNG or JPG image of up to 2 MB.
- **Brand color**: the picker or the hex code (by default, `#ff8811`). It replaces the app's accent color across that whole workspace: so you can tell at a glance which brand you are working on.
- They are saved with **Save identity**.




Default country code and the inline AI draft in the message editor.

## Default country code

It completes phone numbers that arrive without an international prefix: with Ecuador (EC), a `0999999999` is saved as `+593999999999`. The options are Ecuador, Mexico, Colombia, Peru, Argentina, Chile, United States, Spain and Brazil. Change it only if the workspace mainly works outside Ecuador, and click **Save**.

## AI assistance in the message editor

The inline AI draft (**Enable inline AI draft**) adds a button in the inbox that suggests the reply and leaves it in the editor so the agent can review it before sending. It uses AI credits for each suggestion. It is saved with its own **Save**.

> **NOTE**
> The Video calls and Calls tabs have the settings for those modules (microphone on join, recording, transcription, scheduled call reminders). They are explained in their own guides.

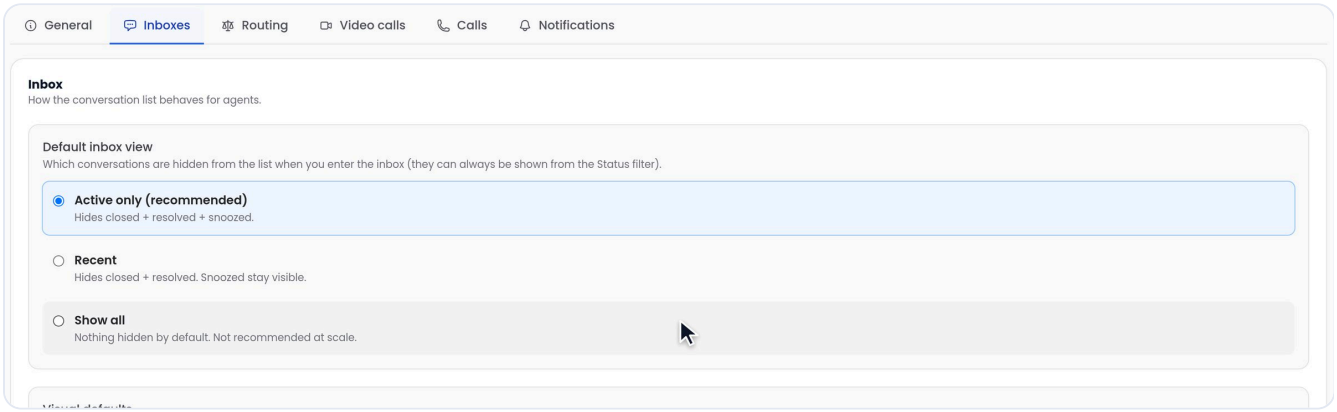
# 05

CHAPTER 5

# Workspace settings: inboxes

How agents see the conversation list.

The **Inboxes** tab decides how the conversation list behaves for the agents of this workspace.

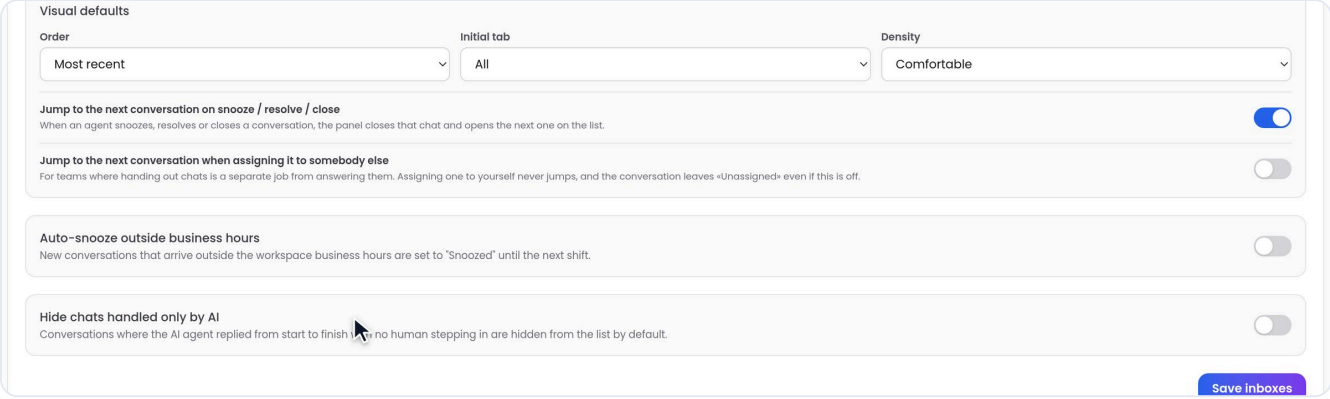



Inboxes tab: which conversations an agent sees when opening the inbox.

## Default inbox view

| Option | What it shows when the inbox opens |
|---|---|
| **Active only (recommended)** | Hides closed, resolved and snoozed conversations. |
| **Recent** | Hides closed and resolved ones; snoozed ones are shown. |
| **Show all** | Hides nothing. Not recommended with high volume. |

What is hidden is not lost: the agent can always show it with the inbox status filter.




Order, initial tab, density and the behavior switches.

## Visual defaults and behavior

| Setting | Options or effect |
|---|---|
| **Order** | Most recent (default), oldest, oldest unanswered or by priority. |
| **Initial tab** | All, Mine or Unassigned. |
| **Density** | Comfortable or Compact. |
| **Jump to the next conversation on snooze / resolve / close** | On: when you finish with a chat, the next one in the list opens. |
| **Jump to the next conversation when assigning it to somebody else** | For teams where distributing is a separate task from answering. |
| **Auto-snooze outside business hours** | New conversations that arrive outside business hours (chapter 16) stay «Snoozed» until the next shift. |
| **Hide chats handled only by AI** | Conversations the AI agent solved from start to finish, without a person stepping in, are hidden from the list. |

Everything is saved with **Save inboxes**.

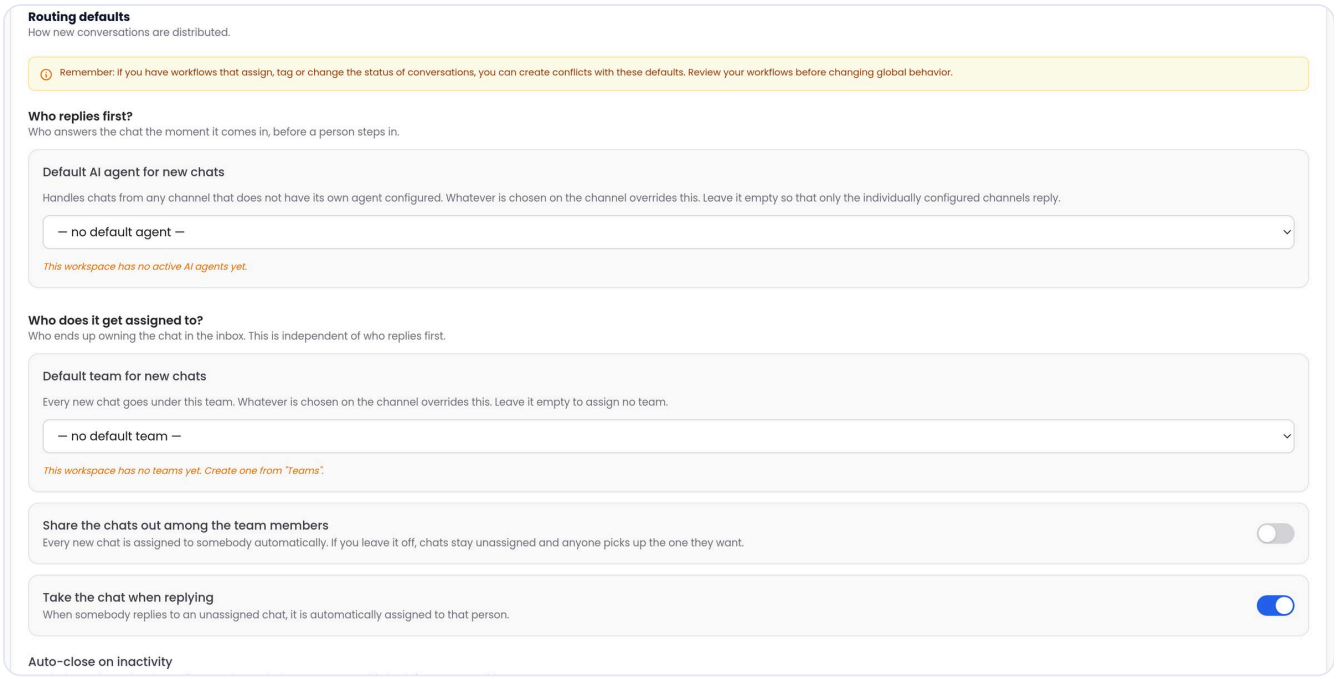
# 06

CHAPTER 6

# Workspace settings: routing

Who handles each new conversation and what happens when it stalls.

The **Routing** tab (titled **Routing defaults**) decides how new conversations are distributed. A yellow notice reminds you that, if you have workflows that assign, tag or change the status of conversations, they may clash with these settings: review them before changing the general behavior.



Routing tab: who answers first and who each new conversation is assigned to.

## Who answers first?

The default AI agent for new chats: the artificial intelligence agent that answers chats from any channel that does not have its own agent configured. What is chosen on the channel wins over this. Leave it without a default agent so that only the channels configured one by one answer.

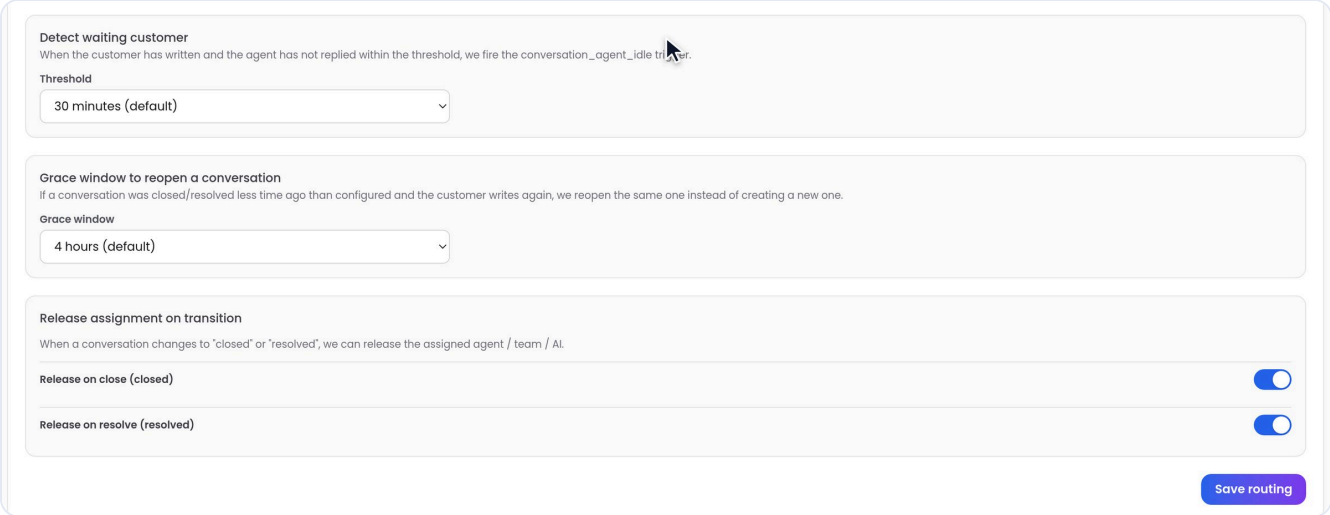
## Who is it assigned to?

- The default team for new chats: the team that owns each new chat (chapter 15). What is set on the channel wins over this.
- Distributing chats among the team's people: if you turn it on, each new chat is assigned to someone automatically. You choose round robin (one to each person, in order) or to whoever has the fewest open chats, and with **Respect agent shift schedules** the assignment only picks whoever is on shift (chapter 11). Off, chats stay unassigned and each person takes the one they want.
- **Auto-claim on reply**: whoever replies to an unassigned chat is assigned automatically.

## Automatic close for inactivity

Two independent rules, depending on who spoke last. You can turn on both, one or none:

| Rule | What it does |
|---|---|
| When the customer does not reply | After 1, 3, 7, 14 or 30 days with no reply from the customer (or Off), marks the conversation as resolved or closes it for good, and can trigger a workflow. It includes marking the conversation «Pending» while the customer is waiting (by default, 24 hours). |
| When we do not reply | If your team leaves a conversation unanswered, it can reassign it to the agent on shift or tag it as unanswered. |
| General rule | Applies only if both rules above are turned off. |




Further down: waiting customer, the reopen window and releasing the assignment on close or resolve.

## The rest of the tab

| Setting | What it does |
|---|---|
| Only the assigned agent marks the chat as read | If another teammate opens the chat, it still shows as unread for whoever it is assigned to. |
| **Conversation history privacy between agents** | Limits what an agent sees of the history handled by someone else. |
| **Re-mark as unread** | Marks a conversation as unread again after a while without a reply or when transferring it to someone else, alerting the assignee with a sound, a browser notification or an email. |
| **Detect waiting customer** | If the customer wrote and nobody answered within the **Threshold** (30 minutes by default), the workflows set up for «customer waiting» are triggered. |
| **Grace window to reopen a conversation** | If a conversation was closed or resolved less than this time ago (4 hours by default) and the customer writes again, the same one is reopened instead of creating a new one. |
| **Release assignment on transition** | **Release on close (closed)** and **Release on resolve (resolved)**: when it becomes closed or resolved, the conversation is no longer assigned to the agent, the team or the AI agent. |

It is saved with **Save routing**. If you turned on an automatic close, Omnifox warns that it also starts applying to existing conversations.

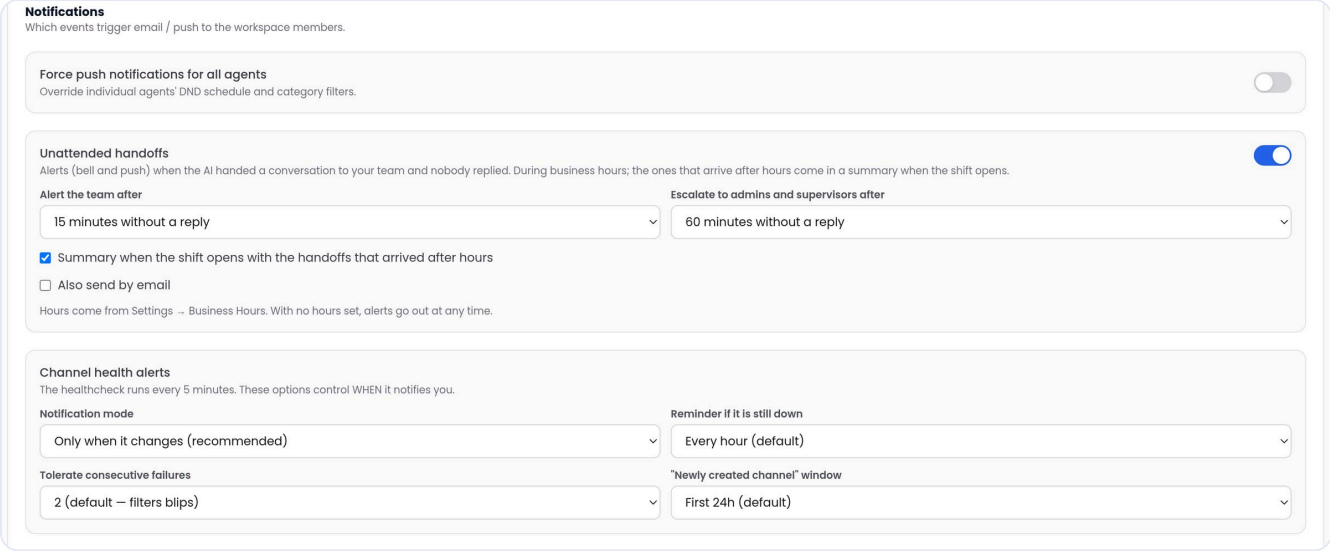
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CHAPTER 7

# Workspace settings: notifications

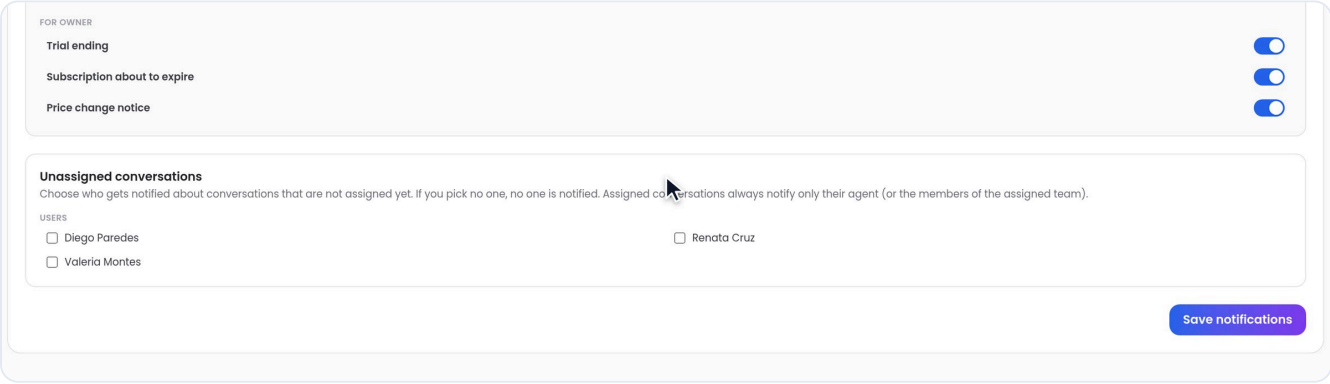
Which alerts workspace members receive, and when.

The workspace **Notifications** tab decides which events trigger alerts (bell, push or email) for that workspace's members. It is different from your personal notifications (chapter 19): here you set the team's rules.




Notifications tab: forced alerts, unattended handoffs and channel health alerts.

| Block | Options |
|---|---|
| **Force push notifications for all agents** | Overrides each agent's quiet hours and filters. Use it carefully. |
| **Unattended handoffs** | Alerts when the AI handed a conversation to people and nobody answered it. **Alert the team after** 5, 10, 15 (default), 30 or 60 minutes without a reply; **Escalate to admins and supervisors after** 30, 60 (default), 120 or 240 minutes, or do not escalate. Within business hours; what comes in after hours arrives in a summary when the shift opens. It can also **Also send by email**. |
| Channel health alerts | Notification mode (only when it changes, recommended; on every check; silent, dashboard only), a reminder if it is still down, tolerance for consecutive failures (filters short outages) and the «newly created channel» window. The check runs every 5 minutes. |
| Notifications by type | One switch per alert type, in three groups: for agents, for admins and for the owner. Turn off the ones you do not need; owners and admins still get the critical ones by email. |




At the end: the owner's alerts and who receives unassigned conversations.

## Unassigned conversations

Choose, under **Users** and **Teams**, who receives the alerts for conversations that do not have an owner yet. If you choose nobody, nobody is alerted. Assigned conversations always alert only their agent (or the members of their team). Everything is saved with the tab's save button.

**TIP**

If your team complains about too many alerts, start here: turn off the types nobody uses and limit who receives unassigned conversations, before asking each person to mute their browser.

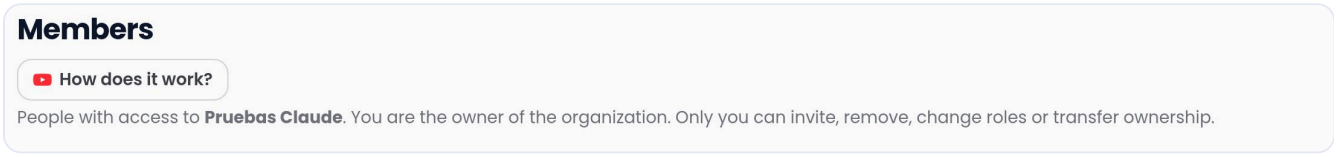
# 08

CHAPTER 8

# Organization members

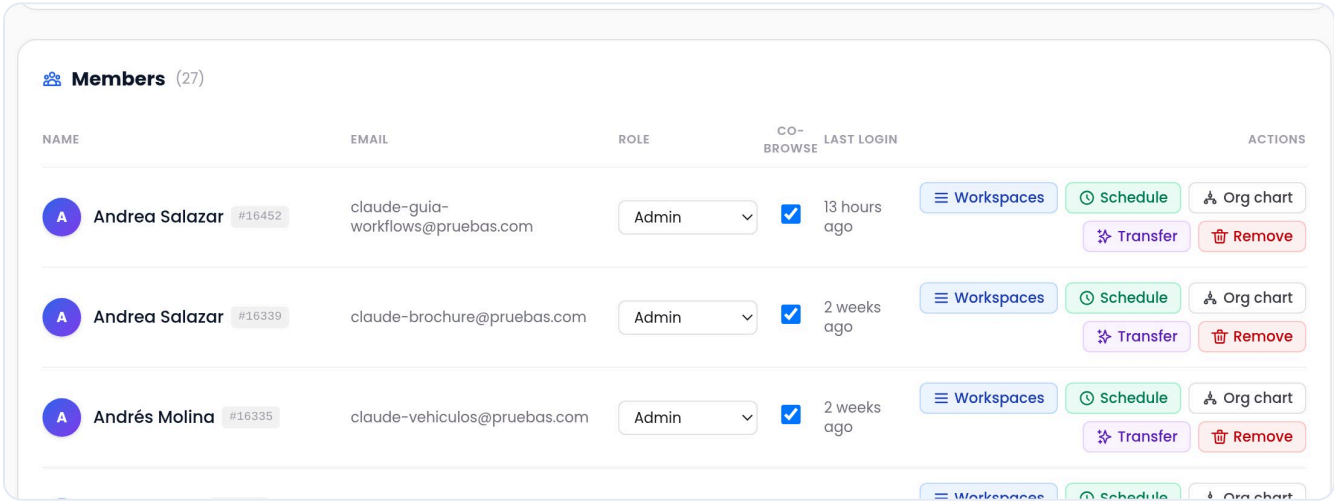
Who has access to your company, and with what role.

Organization members are managed in **Settings → Organization settings → Members** (or in **Settings → Organization → Members**). This screen belongs **to the account owner**: only they can invite, remove, change roles or transfer ownership, and it only appears in the organization submenu for them.




Settings → Members, with its three tabs. Only the account owner sees it.

It has three tabs: **Organization** (this screen), **Workspace** (the members of the active workspace, chapter 13) and **Activity** (the history of people changes, chapter 28). At the top is the **Invite a member** form (chapter 9) and, below, the **Members** table with the total.




The members table: email, role, co-browsing, last login and each person's actions.

| Column | What it shows |
|---|---|
| **Name** | The person, with their internal number (click to copy it), their job title and department if they have them, and a note if they never signed in. |
| **Email** | Their sign-in email. |
| **Role** | A selector with their organization role (chapter 10). The owner appears fixed as owner. |
| **Co-browse** | Only if your organization has the co-browsing add-on: whether they can start co-browsing sessions with customers. Admins always can. |
| **Last login** | How long ago they last signed in, or «Never». |
| **Actions** | **Workspaces**, **Schedule**, **Org chart** (chapter 11), **Resend access**, **Transfer** and **Remove** (chapter 12). |

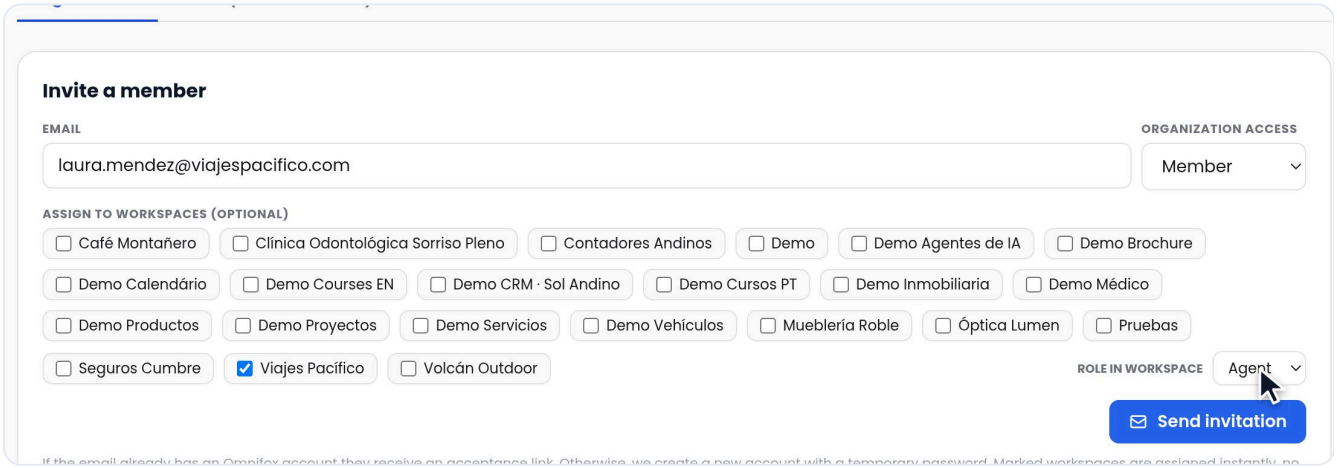
**Resend access** appears for those who have not signed in yet: it sends them a link to create or reset their password, without overwriting the current one.

> **NOTE**
> Organization admins and workspace admins do not see this screen. They can add existing members to their workspaces from Workspace members (chapter 13); inviting new people to the organization is the owner's job.

CHAPTER 9

# 09 Inviting a person

An email, an access level and, if you want, the workspaces they will work in.




Invite a member: email, organization access and, if you want, the workspaces and the role in them.

1. Under **Email**, type the person's email (in the demo, laura.mendez@viajespacifico.com).
2. Under organization access, choose their role: **Admin**, **Billing admin**, **User admin** or **Member** (the default).
3. If you want, under the workspace assignment (optional), tick the workspaces they will work in and, on the right, their workspace role: **Agent** or **Admin**.
4. Click **Send invitation**.

## What the person receives

| If… | Then |
|---|---|
| They already have an Omnifox account | They receive a link to accept the invitation. The link expires in **7 days**. |
| They do not have an account | Omnifox creates one and the access arrives by email. |

The workspaces you ticked are assigned to them right away, with no further acceptance step.

## Pending invitations

Until someone accepts, their invitation appears under **Pending invitations**, with the email, the role and when it expires. From there you can **Resend** the email (the original link still works) or **Revoke** the invitation. If you try to invite someone who already has a pending invitation, Omnifox offers **Resend invitation** instead of creating another one.

- Each invitation takes a **seat** of the plan. If you reached the limit, Omnifox warns you and does not send the invitation.
- Disposable emails, your own email and the email of someone who is already a member are not accepted.
- In the demo we do not send the invitation, because the address does not exist.

10

CHAPTER 10

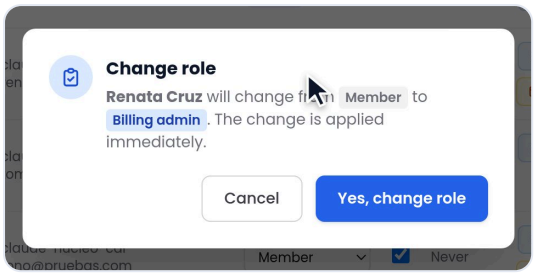
# Organization roles

Five roles: from the one who can do everything to the one who only works in their workspaces.

| Role | What they can do in the organization |
|---|---|
| **Owner** | Everything. They are the only one who manages organization members, billing, ownership transfers and data privacy. There is only one. |
| **Admin** | Configures the organization and all workspaces: creating and deleting workspaces, security, auditing. |
| **Billing admin** | Sees the settings and handles payments and subscriptions. |
| **User admin** | Sees and changes the settings. |
| **Member** | Has no organization permissions: works in the workspaces they are added to, with the role they have in each one. |

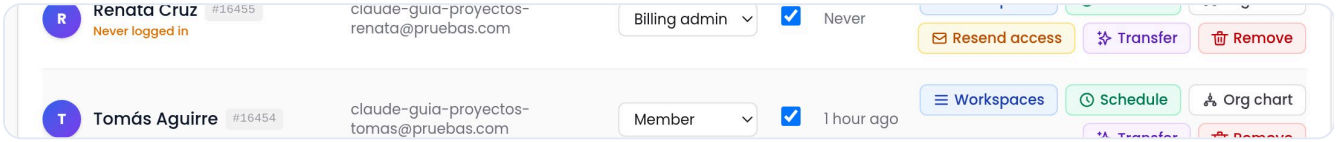
In addition, in each workspace a person is **Agent** or **Admin** of that workspace (chapter 13). An organization member can be admin of one workspace and agent in another.

## Changing someone's role




Changing the role asks for confirmation and applies right away.

1. In the Members table, open the person's **Role** selector.
2. Choose the new role. **Change role** appears, explaining the change and that it applies immediately.
3. Click **Yes, change role**.




Renata, now as billing admin (we then set her back to Member).

In the demo we change Renata to billing admin and leave her as she was. Both changes are recorded in the **Activity** history (chapter 28).

> **TIP**
> Give each person the lowest role that is enough for their work. A customer service agent does not need to be an admin; neither does an accountant who only pays the invoices.

# 11

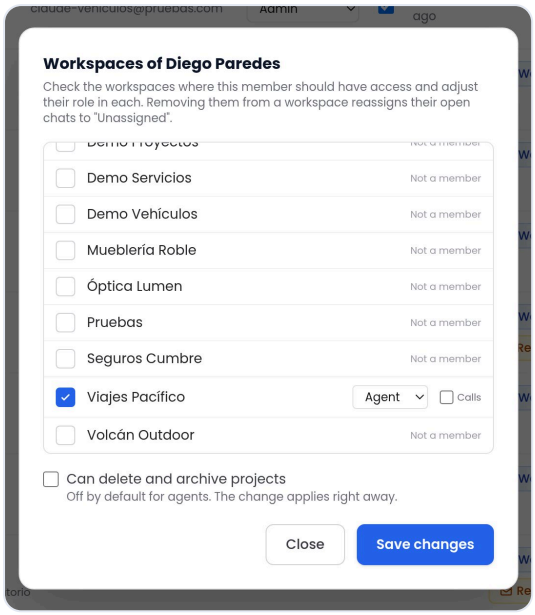
CHAPTER 11

# Each person's workspaces, calls and schedule

Where each person works, whether they make calls, when they are on shift and who they report to.

Each row of the Members table has three buttons to fine-tune that person's work.

## Workspaces



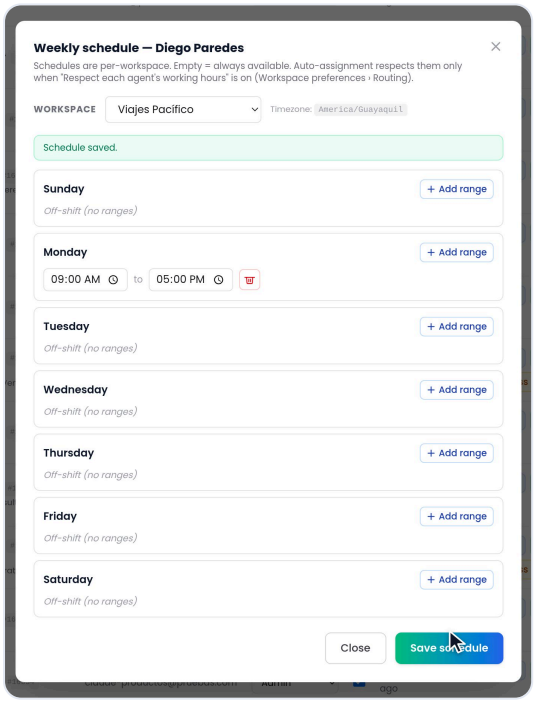

A person's workspaces: which ones they work in, with what role and whether they can make calls.

**Workspaces** opens the person's workspaces dialog, with the list of the organization's workspaces:

- Tick the box of each workspace they will work in and choose their role: **Agent** or **Admin**. The others say they are not a member.
- **Calls**: allows them to make calls from that workspace. Admins always can.
- **Can delete and archive projects**: off by default for agents; it applies right away.
- Click **Save changes**. Omnifox summarizes how many workspaces were added, how many roles changed and how many were removed.

If you remove someone from a workspace, their open chats there become unassigned.

## Weekly schedule




Weekly schedule: each day's shifts, per workspace.

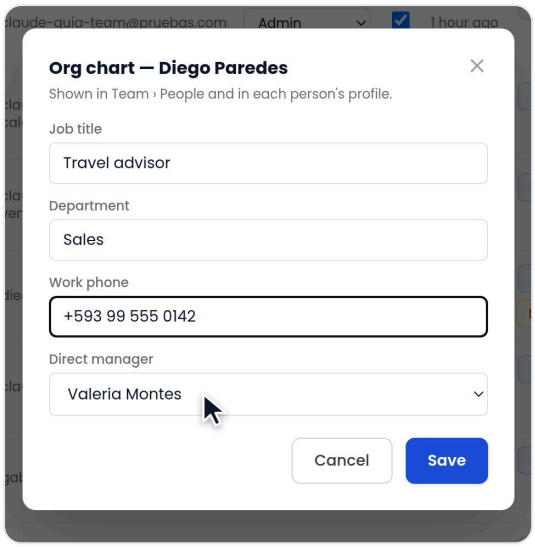
**Schedule** opens the person's **Weekly schedule**. Schedules are **per workspace**: choose the workspace at the top; its time zone is shown.

1. On each day, click **Add range** and type the start and end time (for example, Monday from 09:00 to 17:00). You can add several ranges on the same day.
2. A day without ranges shows as off shift. The trash can removes a range.
3. Click **Save schedule**. A confirmation appears.

If they have no range at all in the whole week, they are **always available**. Ranges that end before they start are discarded when saving.

> **NOTE**
>
> Automatic assignment only respects these schedules if you turned on «Respect agent shift schedules» in Workspace preferences → Routing (chapter 6).

## Org chart




Org chart: job title, department, work phone and direct manager.

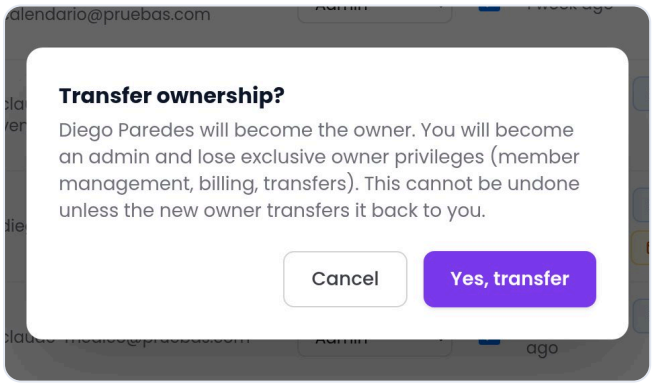
**Org chart** opens the person's org chart dialog, with their **Job title** (for example, «Travel advisor»), their **Department** («Sales»), their **Work phone** and their **Direct manager** (or none). They show in **Team → People** and in each person's profile. It is saved with **Save**.

12

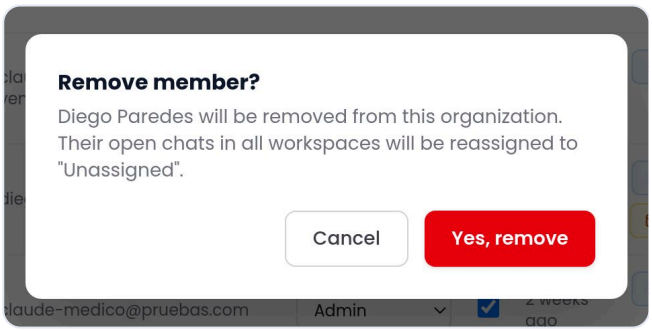
CHAPTER 12

# Transferring ownership and removing someone

Two serious actions: Omnifox explains and asks for confirmation.




Transfer ownership: Omnifox explains what you lose before you confirm.




Remove member: their open chats become unassigned.

## Transferring ownership

**Transfer** makes another person the account **owner**. Omnifox opens a confirmation explaining that you will become an admin and lose the owner's exclusive privileges (member management, billing, transfers). **It cannot be undone**, unless the new owner transfers it back to you. It is confirmed with **Yes, transfer**.

Use it, for example, when the business owner changes or when the account was opened by someone who will no longer manage it.

## Removing someone

**Remove** takes the person out of the organization. Omnifox opens **Remove member?**: their open chats in every workspace become unassigned. It is confirmed with **Yes, remove**.

- The owner cannot be removed: ownership must be transferred first.
- If the person only leaves one workspace, remove them from that workspace (chapter 13) instead of from the organization.
- If someone requested to leave from their profile (chapter 30), their request appears at the top under **Leave requests**, with **Reject** (with an optional note) or **Approve and remove**.
- In the demo, in both cases we only open the confirmation and click **Cancel**.

> **WATCH OUT**
>
> When someone leaves the company, remove them (or deactivate them in their workspaces) on the same day. Their conversations stay in Omnifox; what they lose is access.

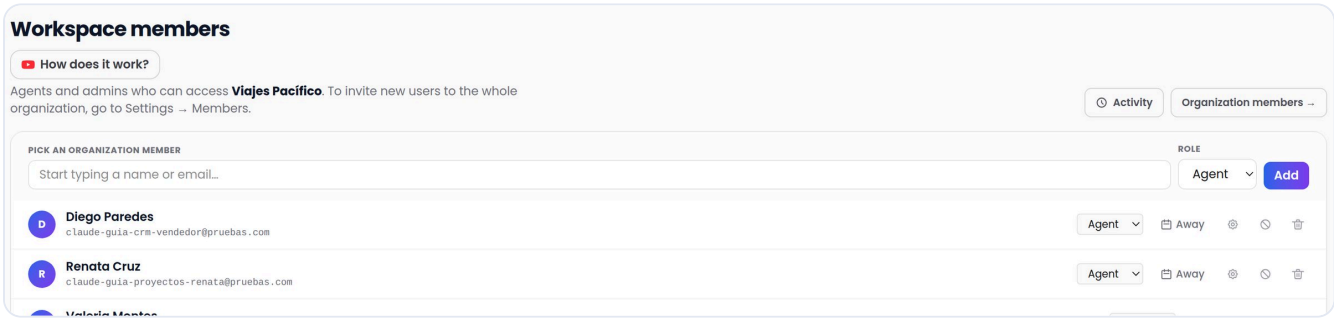
# 13

CHAPTER 13

# Workspace members

Who works in this workspace, with what role and which conversations they see.

Open **Settings** → **People** → **Workspace members**. The top says which workspace it applies to; on the right are **Activity** (the change history) and, for the owner, a link to the organization members.




Workspace members: add someone from the organization and, on each row, their role and actions.

## Adding someone to the workspace

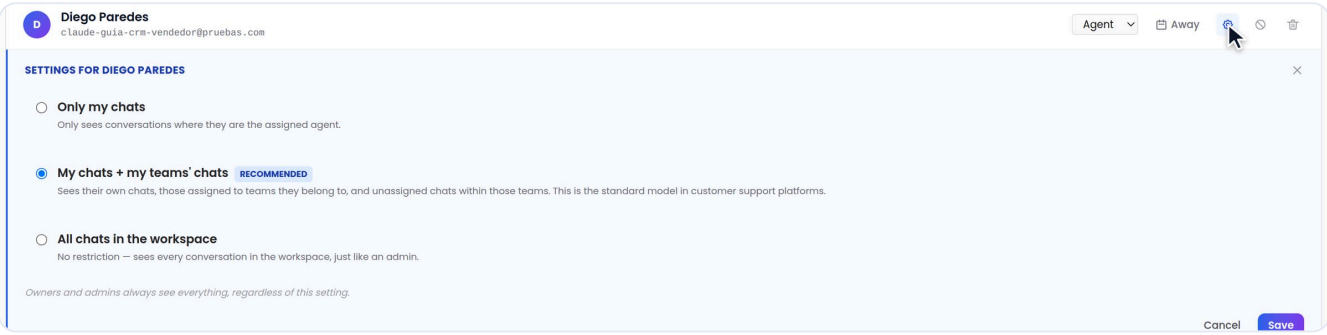
1. In the organization member picker, start typing a name or an email. Only organization members who are not yet in this workspace appear.
2. Choose their **Role**: **Agent** or **Admin**.
3. Click **Add**.

If the person is not yet part of the organization, they must first be invited from Settings → Members (chapter 9).

## In each row

| Control | What it does |
|---|---|
| Role selector | **Agent** or **Admin** of this workspace. The owner appears fixed. |
| **Away** | Mark them out of office (chapter 14). |
| Gear | An agent's settings: which conversations they see. |
| Deactivate | Deactivate the member without losing their history: they stay in the workspace but do not receive new chats. First you choose who gets their open chats. It is undone with Reactivate. |
| Trash can | Remove them from the workspace. |

## Which conversations an agent sees



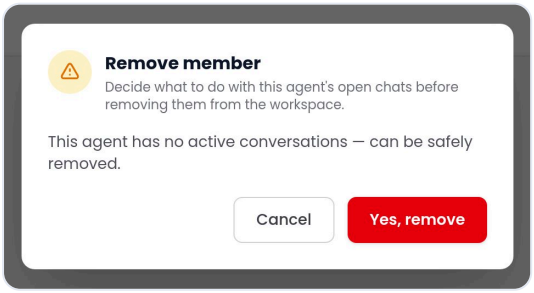

An agent's gear: which conversations they see in the inbox.

The gear opens the agent's settings:

| Option | What they see in the inbox |
|---|---|
| Only my chats | Only the conversations where they are the assigned agent. |
| My chats + my teams' chats (recommended) | Theirs, the ones assigned to the teams they are a member of and those teams' unassigned ones. It is the most common setup in customer service. |
| **All chats in the workspace** | No restriction: every conversation in the workspace, like an admin. |

Owners and admins always see everything, regardless of this option. It is saved with **Save**.

## Removing someone from the workspace




Remove a member from the workspace: first you decide what happens to their open chats.

The trash can opens **Remove member**: first you decide what to do with their open chats (leave them unassigned or pass them to someone else). If they have no active conversations, Omnifox says so and they can be removed without problems. It is confirmed with the dialog's confirmation button.

The person stays in the organization and in their other workspaces; they only leave this one.

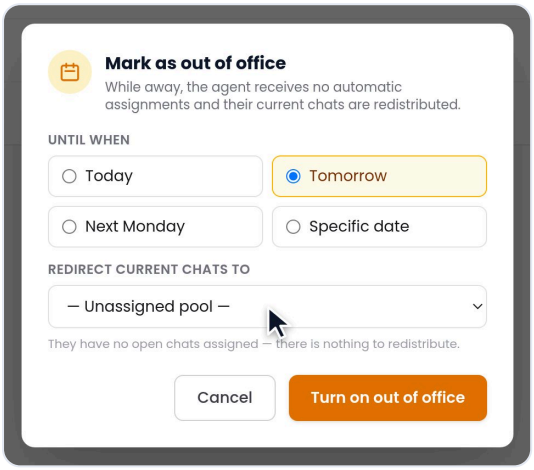
14

CHAPTER 14

# Out of office

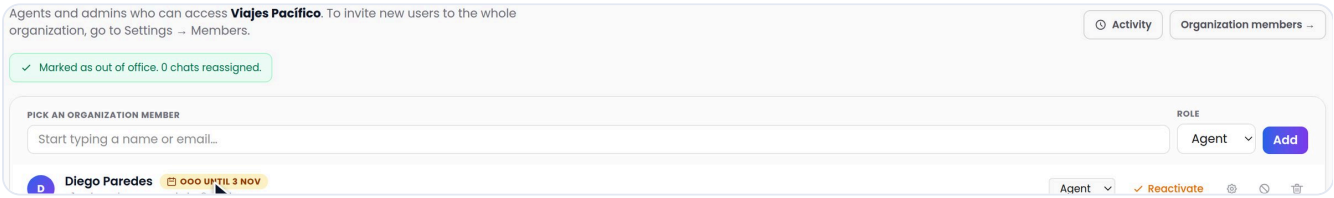
Vacations without lost chats: until when and who gets theirs.

When someone goes on vacation, gets sick or travels, mark them as **away**. While they are away they do not receive automatic assignments and their current chats go to whoever you choose. A workspace admin does it from **Workspace members**.




Mark out of office: until when and who gets their current chats.

1. In the person's row, click **Away**. The out-of-office dialog opens.
2. Under «until when», choose **Today**, **Tomorrow**, **Next Monday** or a specific date.
3. Under «redirect current chats to», choose the unassigned pool, a team (distributed round robin) or a teammate. Omnifox says how many open chats they have that will be reassigned on confirming.
4. Confirm to turn on out of office.




Diego, marked away until tomorrow: the mark appears next to his name and the button changes to Reactivate.

A confirmation appears with the number of chats reassigned and, next to the name, the away-until mark with the date. The row button changes to **Reactivate**: click it to end the absence early.

- The date must be in the future.
- An agent cannot mark themselves away: a workspace admin does it.
- In the demo we mark Diego away until tomorrow and reactivate him right away.

> **TIP**
>
> For recurring absences (for example, someone who does not work on Fridays), it is better to use the person's weekly schedule (chapter 11).

# 15

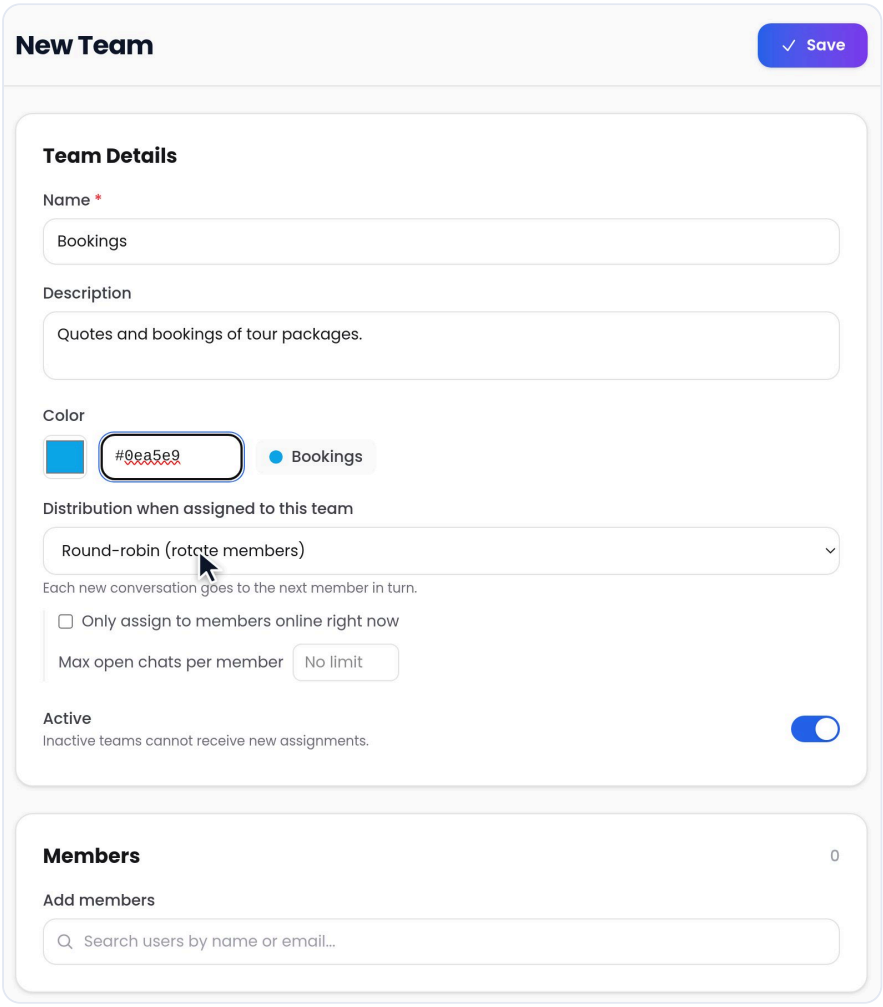
CHAPTER 15

# Teams

Groups of people to distribute work and collaborate.

**Teams** group the people of a workspace for routing and collaboration: Sales, Support, Bookings. A chat can be assigned to a team and, inside the team, to a person. They are created in **Settings** → **People** → **Teams**.

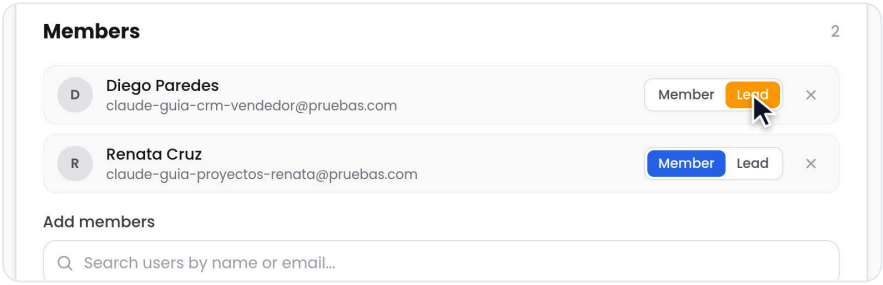
1. Click **New Team** (or **Create Team** if there are none yet). The new team page opens.
2. Type the **Name** («Bookings») and, if you want, the **Description** («Quotes and bookings of tour packages.»).
3. Choose the **Color**: the **Preview** shows what the team label will look like.
4. Choose the **Distribution when assigned to this team** (see the table).
5. Under members, use **Add members** and search by name or email. Mark each one as member or **Lead**.
6. Click **Save**. A confirmation appears.



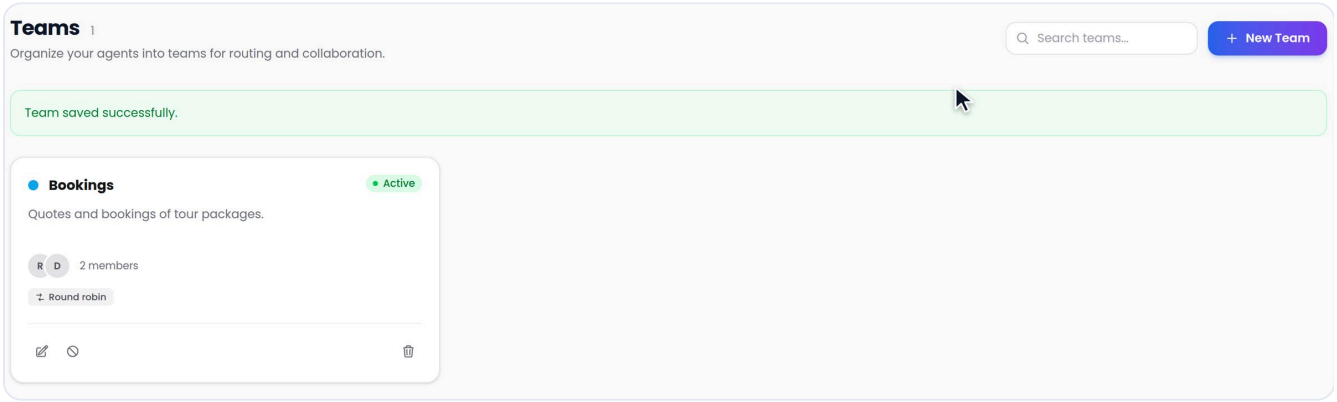

New team: name, description, color, distribution and chat limit.

| Distribution | How the chats assigned to the team are distributed |
|---|---|
| **Shared inbox (no owner)** | The default. Conversations land in the team inbox with no owner: anyone in the team takes them. |
| **Round-robin (rotate members)** | Each new conversation goes to the next member, in turn. |
| **Least busy member** | To whoever has the fewest open chats. |
| **First available (online only)** | To the first member online. |

- **Only assign to members online right now**: avoids sending chats to someone who is not there.
- **Max open chats per member**: a cap per person; empty means no limit.
- **Active**: inactive teams do not receive new assignments.




The team members, each as member or lead.




The Bookings team, saved and active, in the list of teams.

In the list, each team shows its color, name, whether it is active, its description, its members and its way of distributing, with the buttons to edit, deactivate or delete it. Deleting a team cannot be undone.

> **NOTE**
> For new chats to reach a team automatically, choose it as the default team in Workspace preferences → Routing (chapter 6) or in each channel's settings.

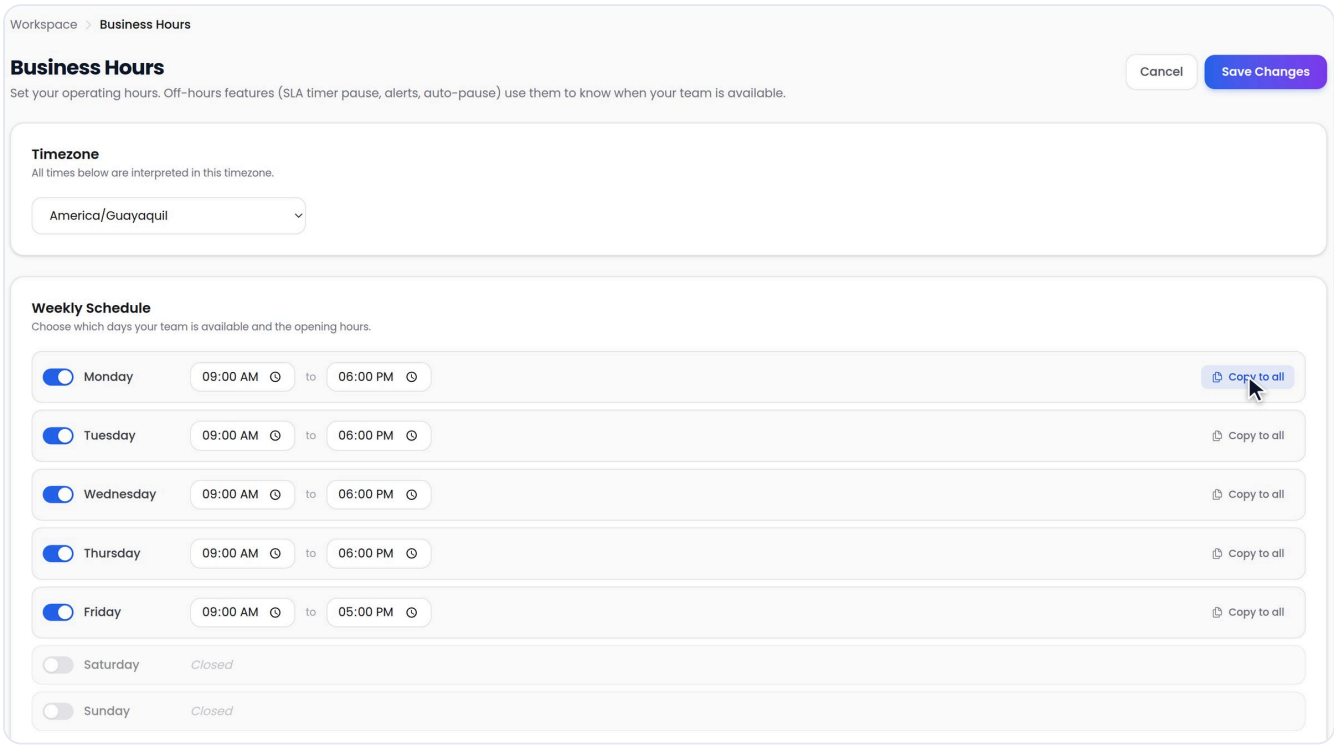
16

CHAPTER 16

# Business hours

The days and hours your team works.

Open **Settings** → **People** → **Business Hours**. It defines when your team works, in the workspace time zone.




Business hours: the time zone and each week's days and hours, with Copy to all.

1. In **Time zone**, choose your business's (here, America/Guayaquil). All times on the page are read in this time zone.
2. In the **Weekly schedule**, turn on the days you work and type each day's opening and closing time. A day turned off says «Closed».
3. To repeat one day's hours across the week, click **Copy to all** on that row.
4. Click **Save Changes**.

If you never set it up, it starts Monday to Thursday from 09:00 to 18:00, Friday from 09:00 to 17:00 and the weekend closed. There is one range per day.

## What uses the business hours

| Feature | How it uses them |
|---|---|
| **Auto-snooze outside business hours** (chapter 5) | Leaves what comes in after hours «Snoozed». |
| **SLA** (chapter 17) | With «Business hours only», the SLA clock stops outside business hours. |
| **Unattended handoffs** (chapter 7) | Alerts within business hours; what comes in after hours arrives in a summary when the shift opens. |
| **Reports** | Days are cut at midnight in this time zone. |

> **NOTE**
> The business hours are the business's; each person's shifts are set separately, in their Weekly schedule (chapter 11).

17

CHAPTER 17

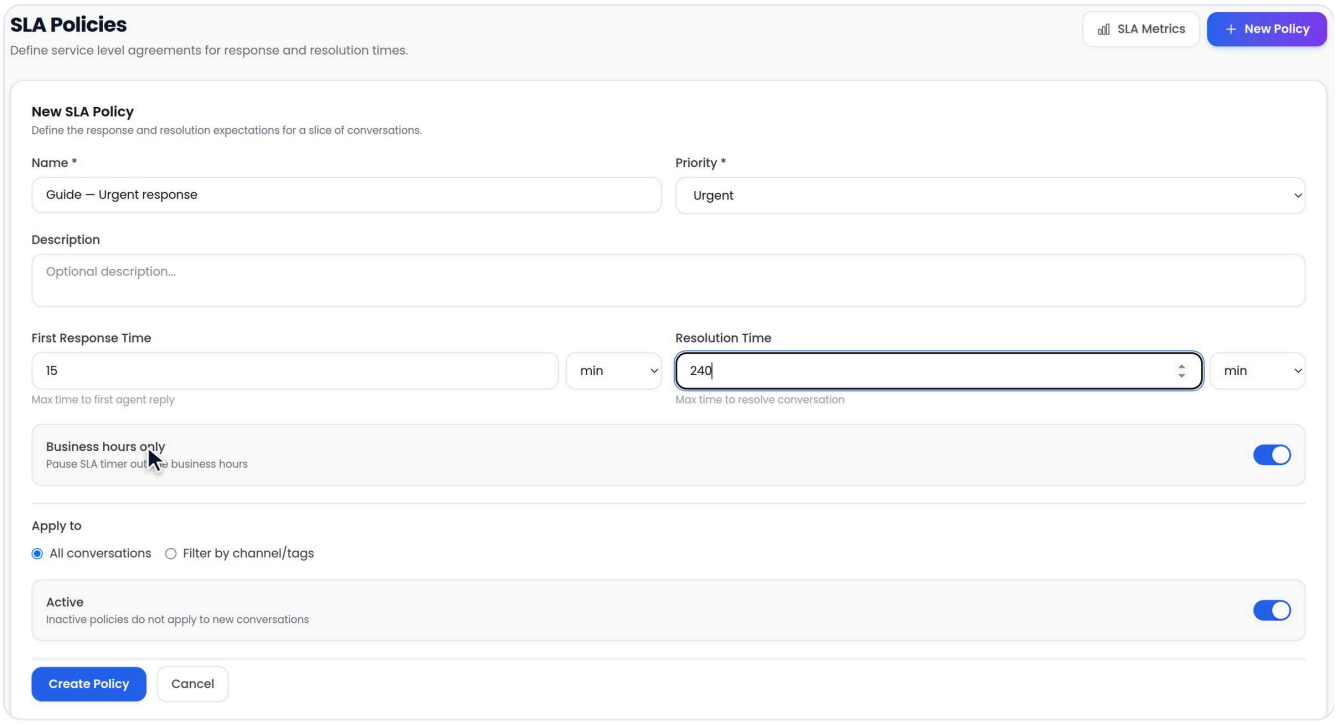
# SLA policies

How long a customer can wait, by priority.

An **SLA** (service level agreement) is the time you commit to: for example, answering an urgent case in 15 minutes and resolving it in 4 hours. Open **Settings** → **Preferences** → **SLA policies**. SLA tracking depends on the plan.

## Creating a policy

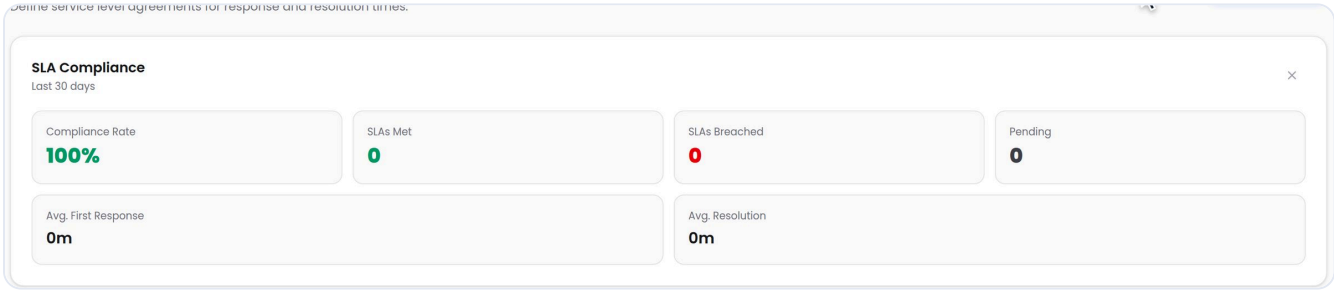
1. Click **New Policy** (or **Create Policy** if there are none yet).
2. Type the **Name** («Guide — Urgent response») and choose the **Priority**: **Urgent**, **High**, **Medium**, **Low** or **None**.
3. Set the **First Response Time** (15 min) and the **Resolution Time** (240 min), each in minutes or hours.
4. Turn on **Business hours only** if the clock should stop outside the chapter 16 hours.
5. Under **Apply to**, choose **All conversations** or **Filter by channel/tags** and tick the channels or tags.
6. Leave **Active** on (inactive policies do not apply to new conversations) and click **Create Policy**.




New SLA policy: priority, target times, business hours and which conversations it applies to.

Each policy appears as a card with its name, priority, whether it is active and its times (first response and resolution), with buttons to turn it on or off, edit it and delete it.

## Compliance




SLA metrics: compliance over the last 30 days.

**SLA Metrics** opens the **SLA Compliance** panel for the last 30 days: **Compliance Rate**, **SLAs Met**, **SLAs Breached**, **Pending**, and the average first response and resolution time. Conversations about to breach or already breached also appear in the reports' **Live supervisor**, and the **SLA breached** alert reaches whoever has it turned on in their notifications.

> **TIP**
>
> Start with one or two realistic policies, for example one for Urgent and a general one. An SLA that is never met stops being looked at.

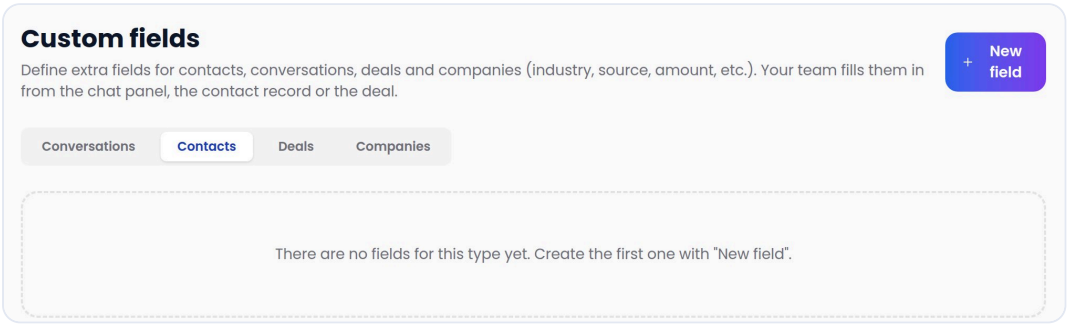
# 18

CHAPTER 18

# Custom fields

Your business's own data on every contact, conversation, deal or company.

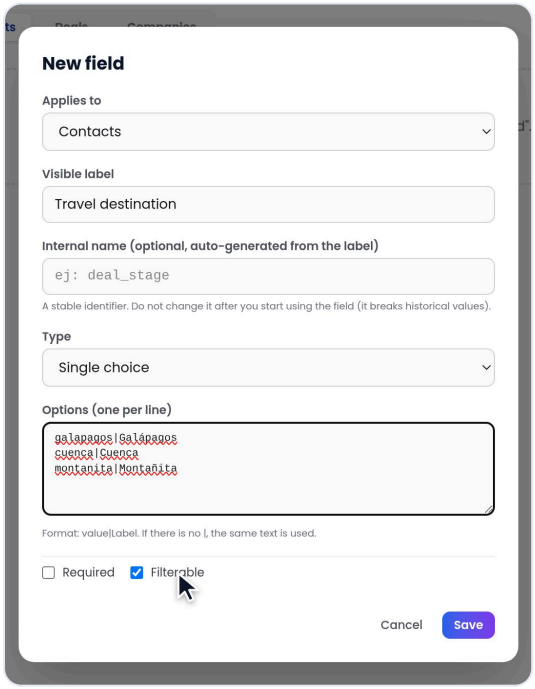
**Custom fields** add data that Omnifox does not include out of the box: in a travel agency, the destination or the departure date; in a clinic, the insurer. Your team fills them in from the chat panel, the contact record or the deal. They are created in **Settings** → **Preferences** → **Custom fields**; they are available from the Crece plan up.




Custom fields, with one tab per record type.

There is one tab per record type: **Conversations**, **Contacts**, **Deals** and companies, each with its table of fields (visible label, internal name, type, required, filterable).

## Creating a field




New field: «Travel destination», single select, for contacts.

1. Click **New field**.
2. Under **Applies to**, choose what it applies to (here, **Contacts**). It cannot be changed later.
3. Type the visible label: «Travel destination». The **Internal name** is built automatically if you leave it empty.
4. Choose the **Type**.
5. If it is a selection, type the **Options (one per line)** in the format `value|Label`: `galapagos|Galápagos`.
6. Tick **Required** if it cannot be left empty and **Filterable** if you want to filter by it. Click **Save**.

| Data types | |
|---|---|
| Short text, Long text | Names, notes. |
| Integer, Decimal | Quantities, amounts. |
| Date, Date and time | Departure date, appointment. |
| Single select, Multi select | Destination, interests. |
| Yes / No | Checkboxes. |
| URL, Email, Phone | With their validation. |

Deleting a field removes it from the screens, but the values already entered are kept.

> **WATCH OUT**
> Do not change the internal name of a field that is already used in workflows or integrations: it is the reference they find it by.

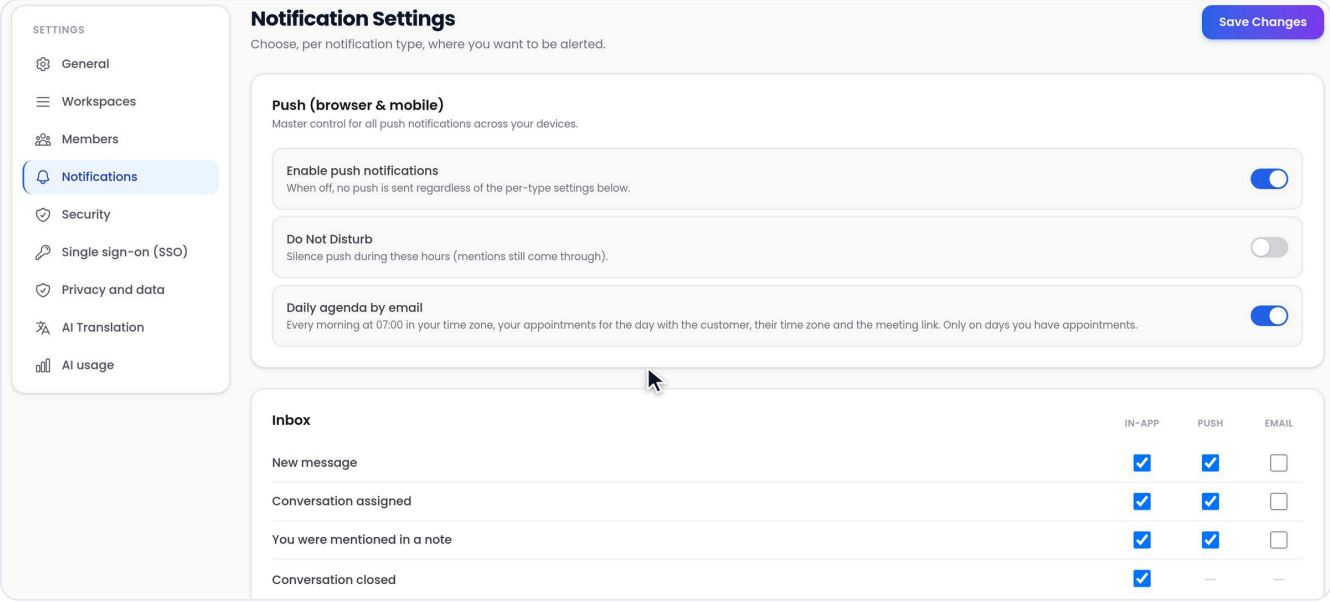
19

CHAPTER 19

# Your notifications

Each person chooses which alerts they receive and how.

Personal notifications have two screens: **Settings → Notifications** (which alerts and through which channel) and the one in the avatar menu (this browser's permission). What you choose here only affects you.




Settings → Notifications: the main push switch and, per alert type, in-app, push or email.

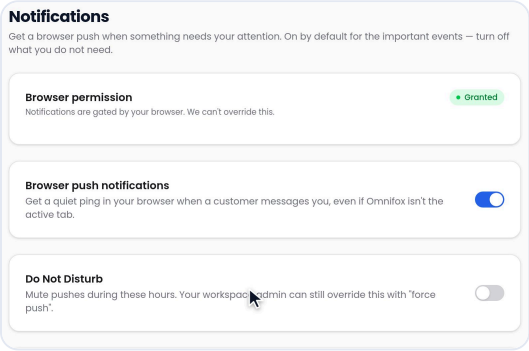
## Notification settings

- **Enable push notifications**: the main switch. Off, no push reaches you, regardless of what is below.

- **Do Not Disturb**: mutes push during the hours you choose (for example, from 22:00 to 07:00); mentions still come through.
- **Daily agenda by email**: every morning at 07:00 in your time zone, your appointments of the day.
- A table with each alert type and three columns: in the app (this workspace's bell), push and email (which follow you across all your workspaces). The groups are Inbox (new message, conversation assigned, you were mentioned in a note, SLA breached, unattended handoff, negative CSAT...), Projects, CRM, Channels, Automations, Team, Billing and Reports. A dash means that channel does not apply.
- It is saved with **Save changes**.

Owners and admins also see the **Daily summary of unanswered conversations**: one email a day with the open conversations where the customer wrote and nobody replied, with the threshold, time and time zone, and the **Send me a test now** button.

## The browser permission




Avatar → Notifications: the browser permission and this device's push alerts.

In your avatar menu, **Notifications** opens the browser screen:

- **Browser permission**: **Granted**, Blocked or not requested yet. Without permission, the browser cannot show alerts.
- **Browser push notifications**: subscribes this browser to receive alerts even when Omnifox is in another tab or in the background.
- **Do Not Disturb**, **What to push** (AI agent replies, conversation closed, workflow triggered, team assigned to a teammate) and the **Active devices**.

> **NOTE**
> If an admin turned on «Force push notifications for all agents» in the workspace (chapter 7), alerts arrive even if you have Do Not Disturb on.

CHAPTER 20

# 20 Two-factor authentication

Your account protected even if someone knows your password.

**Two-factor authentication** (2FA) asks, in addition to the password, for a six-digit code that changes every 30 seconds and only your phone has. Even if someone gets your password, without your phone they do not get in.

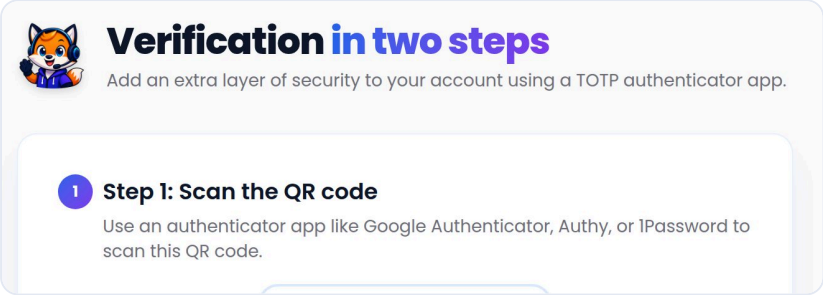
It is turned on from your profile (**Enable 2FA**) or from **Settings** → **Security** (**Set it up**).




Settings → Security: your two-factor authentication (Set it up button) and the option to require it for everyone.

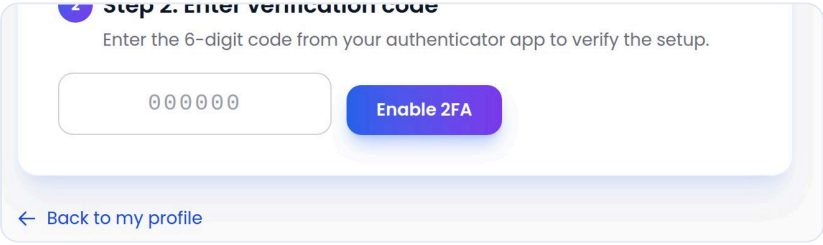
## Turning it on

You need an authenticator app on your phone: **Google Authenticator**, **Authy**, **1Password** or another compatible one.




Step 1: scan the QR code with an authenticator app (the code, cropped here, is drawn in your browser).

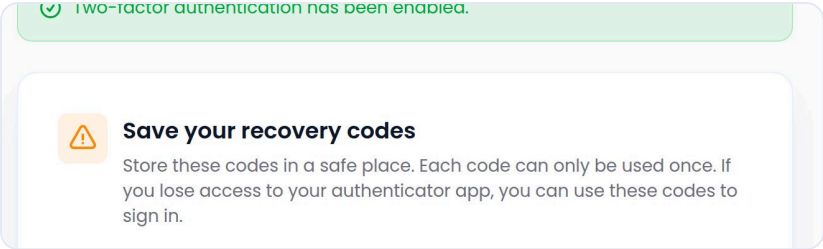
1. **Step 1: Scan the QR code**. Open the authenticator app, add an account and scan the QR code on the screen. If you cannot scan it, use the manual entry option and copy the key into the app.
2. **Step 2: Enter verification code**. Type the six-digit code shown by the app.
3. Click **Enable 2FA**.




Step 2: the six-digit code shown by the app and Enable 2FA.

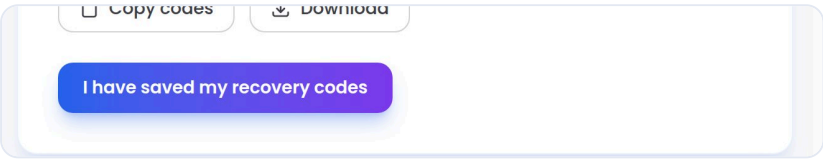
The QR code is drawn in your own browser: the key does not leave Omnifox for any other service. Visiting this page changes nothing; two-factor authentication only becomes active when you confirm the code.

## The recovery codes




Two-factor authentication enabled: Omnifox shows the eight recovery codes (cropped in this screenshot).

When you turn it on, a confirmation appears along with the prompt to save your recovery codes: **eight** single-use codes. They let you sign in if you lose or change your phone.




Copy or download the codes and confirm you saved them.

1. Click **Copy codes** or **Download**.
2. Keep them somewhere safe, away from the phone: a password manager or a piece of paper in a locked drawer.
3. Click **I have saved my recovery codes**.

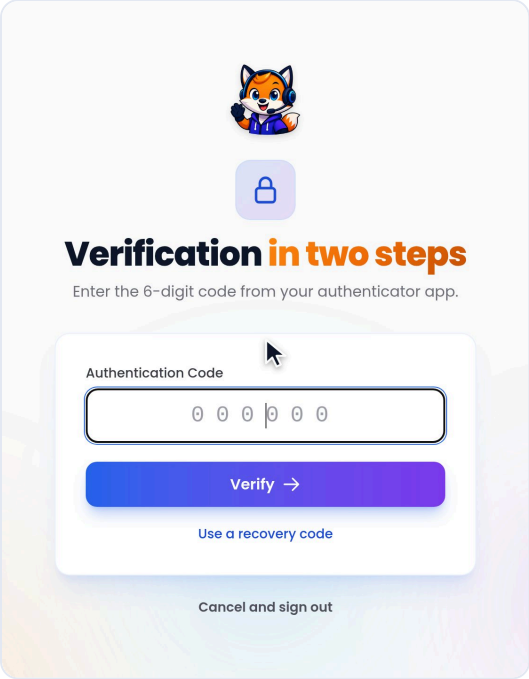
> **WATCH OUT**
>
> Treat the recovery codes like a password: do not send them over chat or keep them in a screenshot. That is why they do not appear in this manual.

21

CHAPTER 21

# Signing in with two-factor authentication

From now on, the password and the phone code.



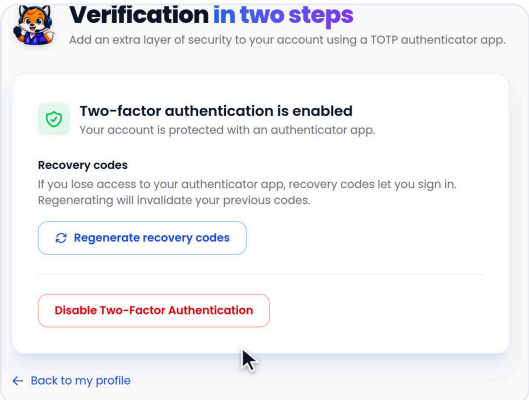

When signing in, after the password: the app code or a recovery code.

With two-factor authentication on, when signing in, after the email and password Omnifox shows the two-factor challenge:

1. Open the authenticator app and look at the Omnifox code.
2. Type it in **Authentication Code**.
3. Click **Verify**.

- **Use a recovery code**: if you do not have your phone, type one of your eight codes. Each code works only once.
- **Cancel and sign out**: goes back to the start without signing in.
- For security, there is a maximum of 5 attempts per minute.

## Regenerating the codes or turning it off




With two-factor authentication on: regenerate the recovery codes or turn it off.

From the two-factor authentication page (Security → **Manage**, or your profile), with it turned on you see that two-factor authentication is enabled and two options:

- **Regenerate recovery codes**: creates eight new codes; the previous ones stop working. Use it if you used up several or think someone saw them.
- **Disable Two-Factor Authentication**: turns it off.

Both **ask for your password**. The **Back to my profile** link takes you back to the profile.

**TIP**

Changed phones? Before deleting the app from the old phone, sign in to Omnifox, turn two-factor authentication off and turn it back on scanning the code with the new phone. If you no longer have the old phone, sign in with a recovery code.

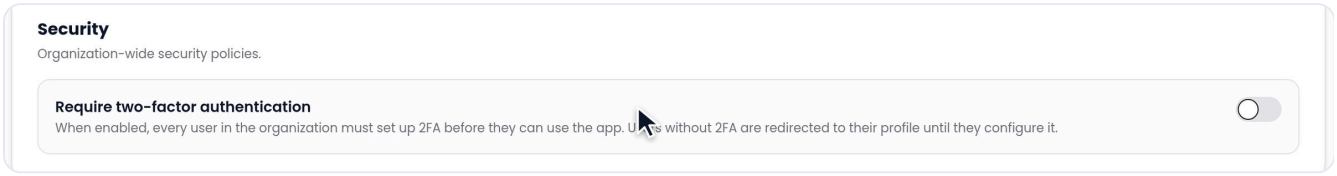
22

CHAPTER 22

# Mandatory two-factor authentication

Nobody in your organization signs in with just a password.

The owner or an admin can **require** two-factor authentication for the whole organization. It is a single setting that appears in two places:




In General: Require two-factor authentication.




In Security: Enforce 2FA for all users. It is the same setting as the one in General.

| Where | Switch name |
|---|---|
| **Settings** → **General**, Security card | **Require two-factor authentication** |
| **Settings** → **Security**, Two-Factor Authentication card | **Enforce 2FA for all users** |

Turning one on or off changes the other.

## What happens when it is on

- Whoever already has it set up notices nothing.
- Whoever does not is taken to their **profile** on signing in, with a notice that two-factor authentication is mandatory and the **Set up 2FA now** button. They cannot use the rest of Omnifox until they set it up (chapter 20).
- It depends on the plan: if yours does not include it, Omnifox says so when you try to turn it on.

We do not turn it on in the demo because it would affect every demo account in that organization.

> **TIP**
> Before turning it on, tell your team and share chapter 20: that way everyone has their authenticator app ready and nobody gets stuck first thing on a Monday.

# 23

CHAPTER 23

# Password policy

The length and requirements of every password in your organization.

In **Settings** → **Security**, the **Password Policy** card sets the minimum requirements. They apply to **every password created or changed** in the organization.

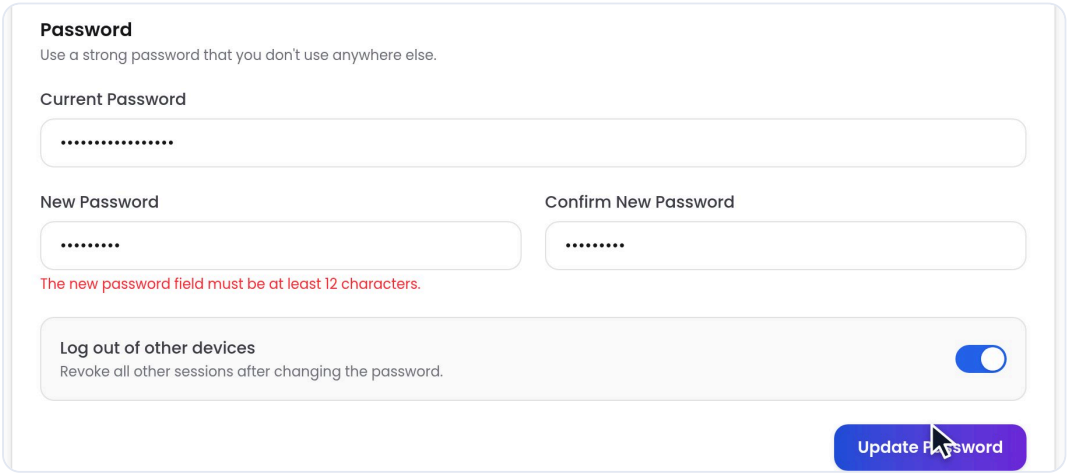



Password policy: minimum length and the three requirements.

| Setting | What it requires |
|---|---|
| **Minimum password length** | The minimum number of characters. Never less than 8. |
| **Require uppercase letter** | At least one uppercase letter. |
| **Require number** | At least one number. |
| **Require special character** | At least one symbol, such as ! # $ or %. |

1. Open **Settings** → **Security** and scroll down to **Password Policy**.
2. Type the minimum length (in the demo, 12) and turn on the requirements you want.
3. Click **Save Changes**, at the top. A confirmation appears.

## How you notice it




With the 12-character policy, a short password is not accepted and Omnifox says why.

From that moment, a password that does not meet the policy is not accepted, and Omnifox explains what it is missing: for example, that the new password must be at least 12 characters. Existing passwords keep working; the policy applies when each person changes theirs.

In the demo we required twelve characters, uppercase, number and special character, tried it in the profile and then went back to the previous policy.

> **TIP**
>
> A long password is worth more than a complicated short one: «trip-to-galapagos-in-march» is harder to guess than «Vp#2026».

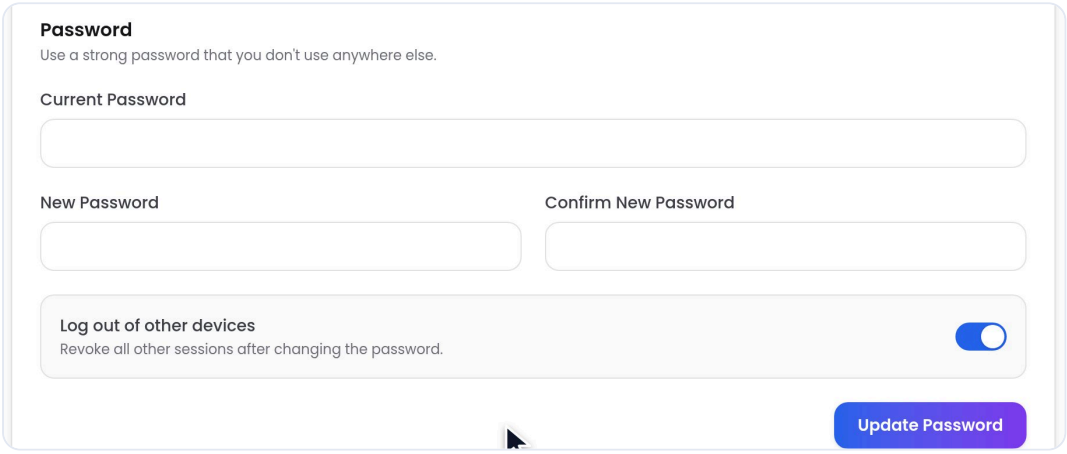
# 24

CHAPTER 24

# Changing your password

The current one, the new one twice, and the other sessions closed.

Your password is changed in your **Profile**, in the **Password** card.




Profile → Password: the current one, the new one twice and Log out of other devices.

1. Type your **Current Password**.
2. Type the **New Password** and repeat it in **Confirm New Password**. It must meet your organization's policy (chapter 23).
3. Leave **Log out of other devices** on if you want any other open session of yours (another computer, your phone) to close right away.
4. Click **Update Password**.

## A good password

- **Long**: a phrase of several words is better than a word with symbols.
- **Unique**: do not use it anywhere else. If another site suffers a leak, your Omnifox account is not exposed.
- **Kept in a password manager**, not on a sticky note on the monitor.

**WATCH OUT**

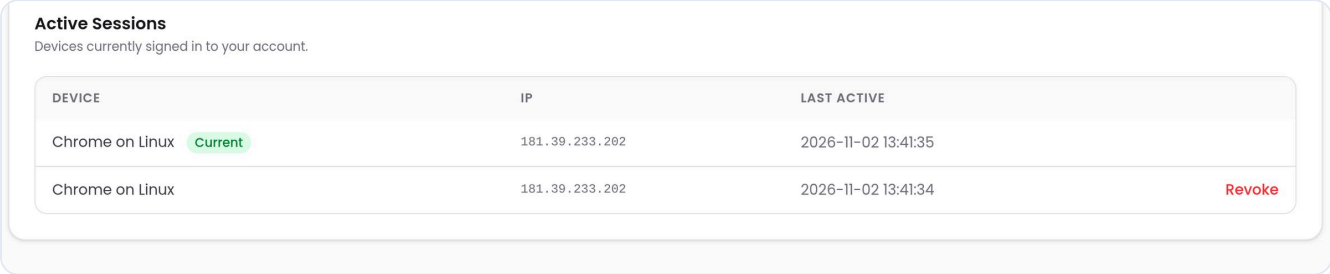
If you suspect someone else learned your password, change it immediately with «Log out of other devices» on, and check your active sessions (chapter 25).

CHAPTER 25

# 25 Active sessions

Where your account is open, and how to close what you do not recognize.

In **Settings** → **Security**, the **Active Sessions** card shows your account's open sessions: the **Device** (browser and system), the **IP** and the **Last activity**. The one for this browser says **Current**.



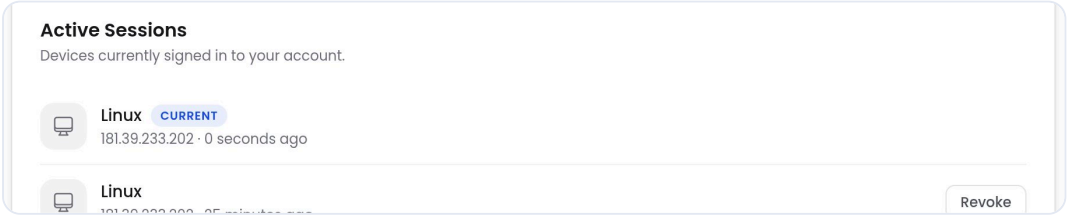

Active sessions in Security: this browser's (Current) and another one that can be revoked.

1. Find the session you want to close: another browser, a borrowed computer, a device you do not recognize.
2. Click **Revoke** on that row and confirm.
3. That browser is locked out: the next time it is used, it will have to sign in again with the password (and code, if two-factor authentication is on).




After Revoke, only the current session remains.

The same sessions appear in your **Profile**, in the **Active Sessions** card, also with **Revoke**:




The same sessions, in your profile.

- Each person sees and revokes only their own sessions.
- The current session has no Revoke: to close it, sign out from the avatar menu.

- To close all the others at once, change your password with **Log out of other devices** (chapter 24).

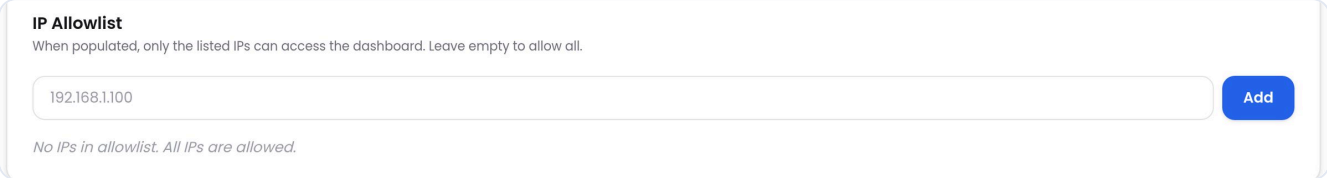
> **WATCH OUT**
> A session with an IP or device you do not recognize is a red flag: revoke it, change your password and turn on two-factor authentication.

CHAPTER 26

# 26 IP address allowlist

Sign in to Omnifox only from the addresses you allow.

The **IP Allowlist**, in **Settings** → **Security**, allows signing in to the Omnifox dashboard **only** from the addresses you add: for example, your office's. When the list is empty, all addresses are allowed.




Empty list: all addresses are allowed.

## Adding addresses

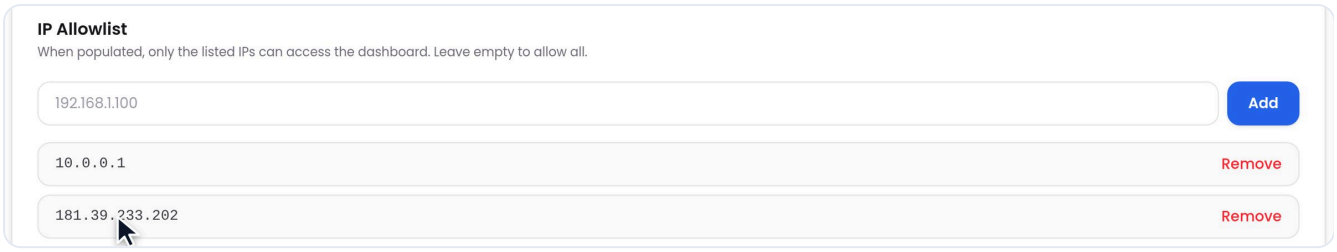
1. Type an address in the field (for example, `181.39.233.202`) and click **Add**, or press Enter. Single addresses (IPv4 or IPv6) or ranges in CIDR format, such as `192.168.1.0/24`, are accepted.
2. Repeat with each address. Each one has its own remove button.
3. Click **Save Changes**, at the top.

## You cannot lock yourself out




A list without your current address is not saved: you would lock yourself out.

If you try to save a list that **does not include the address you are connected from**, Omnifox does not save it and explains that you must add your current IP address first or you would lock yourself out. In the demo we tried a list that only had `10.0.0.1`, added the office's address and saved.




The list with the office address added.

## What happens next

- From that moment, anyone trying to sign in from another address is **logged out with a notice**, even with the right password.
- Other possible errors: an invalid IP or CIDR range, and an IP that is already on the list.
- To allow every address again, leave the list empty and save. We empty it at the end.

> **WATCH OUT**
> Use it only if your team works from fixed addresses. If someone works from home or from their phone on mobile data, their address changes and they would be locked out. Ask your internet provider whether your office address is static.

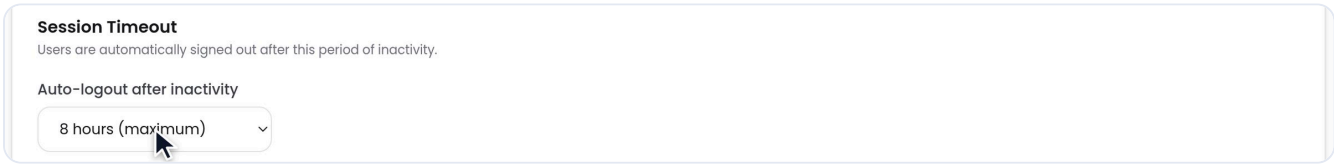
# 27

CHAPTER 27

# Logout for inactivity

If someone leaves Omnifox open and walks away, the session closes on its own.

In **Settings** → **Security**, the **Session Timeout** card logs out whoever stops using Omnifox for a while.




Session timeout: auto-logout after inactivity, with 8 hours as the maximum.

1. In **Auto-logout after inactivity**, choose **15 minutes**, **30 minutes**, **1 hour**, **2 hours** or 8 hours (the maximum).
2. Click **Save Changes**.

- **Eight hours is the platform maximum**: no session stays open longer than that without activity.
- When they come back, the person sees the notice that their session was closed for inactivity and signs in again.
- It applies to every member of the organization.

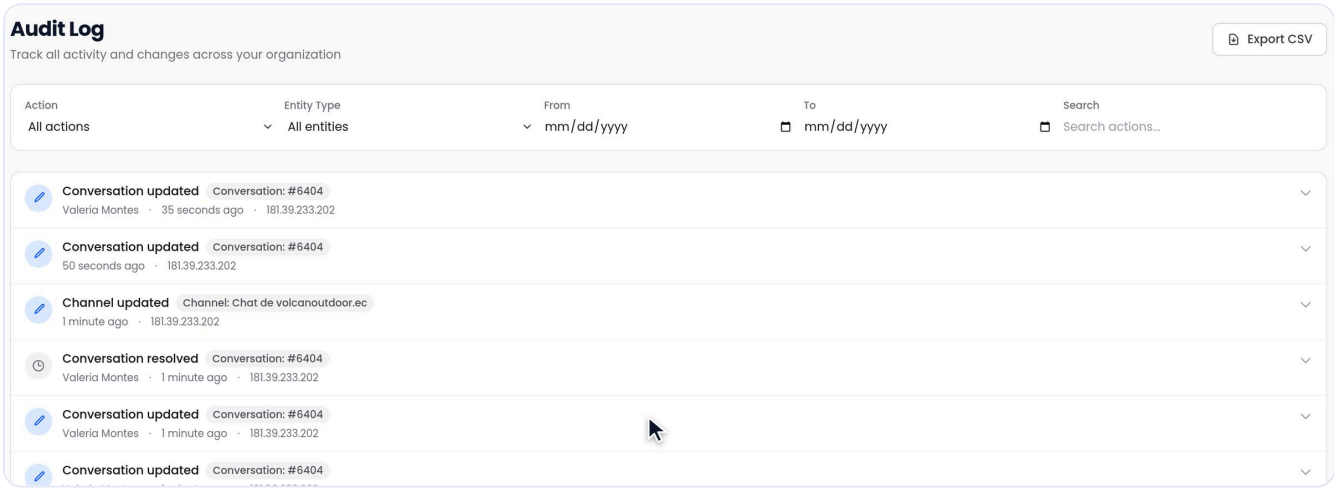
> **TIP**
>
> It is useful on shared computers, such as a front desk. For a team that works all day from their own computer, a very short time forces them to sign in many times without much gain.

CHAPTER 28

# 28 Audit log and member activity

Who changed what, when and from where.

The **Audit Log** keeps the important changes in the organization: who created, changed or deleted what, when and from which IP address. It opens with **View all** from the **Activity log** card in **Settings → General** (chapter 2). It is available on the plans that include auditing.




Audit log: filters, CSV export and every change with its author, time and IP address.

## Reading and filtering the log

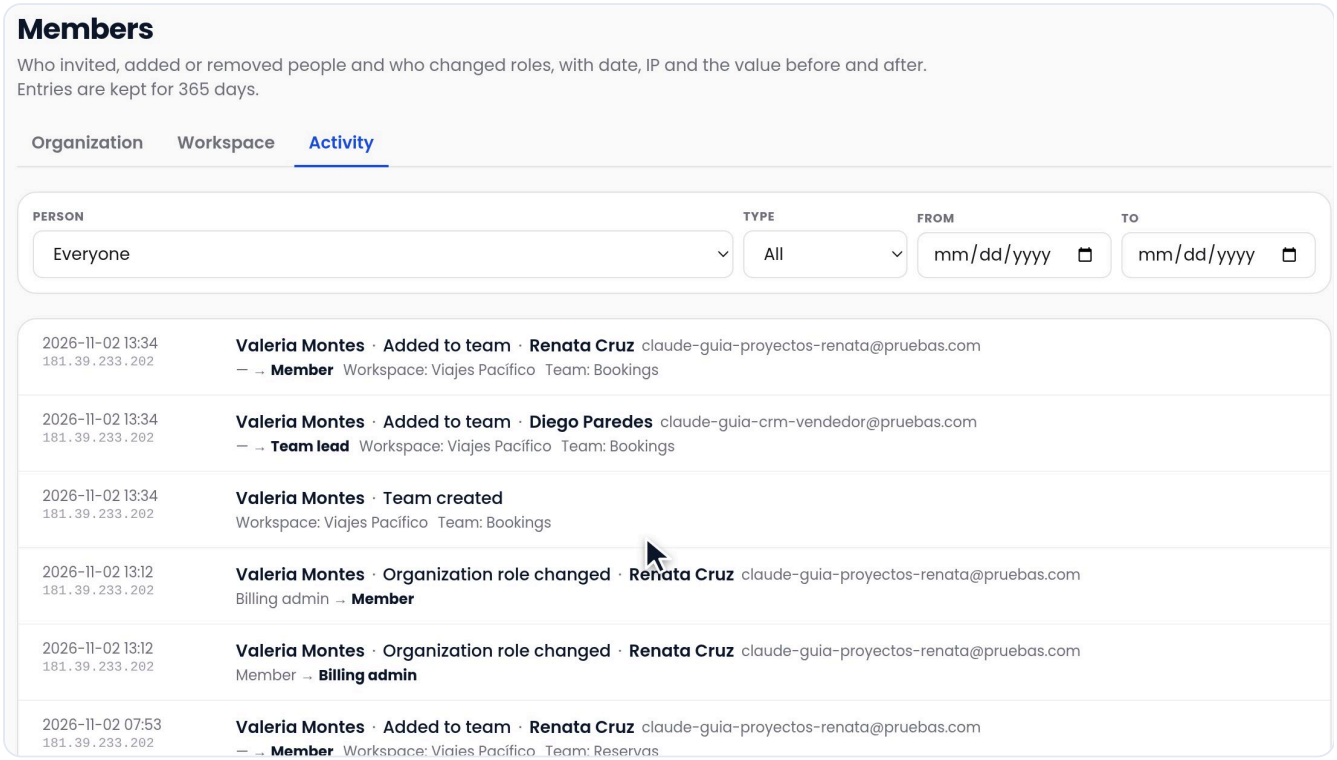
- Each row states the action in plain language («Team created», «Conversation updated», «Contact created»), on what («Team: Bookings», «Conversation: #5651»), who did it, how long ago and the IP address.
- Expanding a row shows the **old values** and the **new values**, plus the technical details of the request.
- Filters: **Action**, **Entity Type**, **From**, **To** and **Search**.
- **Export CSV** downloads what you are looking at, with the same filters, to keep it or review it in a spreadsheet.

## Who sees it

| Role | What they see |
|---|---|
| Owner and organization admins | The whole log. |
| Workspace admins | Only what belongs to the workspaces they manage. |
| Agents | They cannot open it. |

Changes that do not belong to a workspace (organization settings, user accounts) are only visible to the owner and organization admins. The export follows the same rules.

## Member activity




Members → Activity: invitations, logins, role changes and people leaving.

In **Members → Activity** is the history of people: invitations, acceptances, joining the organization, role changes (with the before and after value), people added to or removed from workspaces and teams, absences, deactivations and ownership transfers, with the date, time and IP of whoever did it.

- Filters: person, type (Organization, Workspace, Teams), from and to.
- Records are kept for 365 days.
- The owner and organization admins see it; a workspace admin, only what belongs to their workspaces. It also opens with the **Activity** button in Workspace members.

> **TIP**
>
> Check the audit log from time to time, and whenever something «changed on its own»: a disconnected channel, a different role, a workflow turned off. The log says who did it and when.

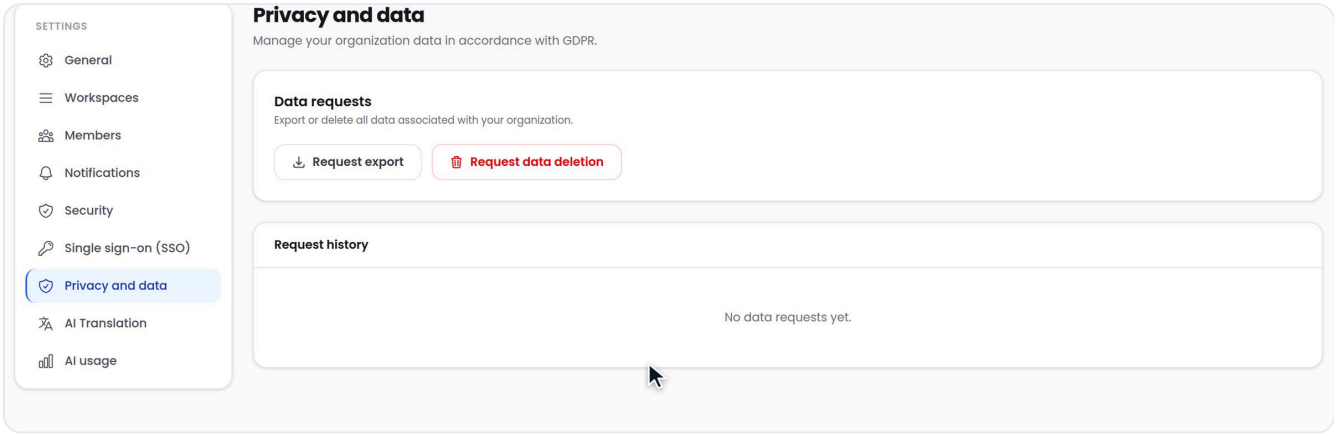
# 29

CHAPTER 29

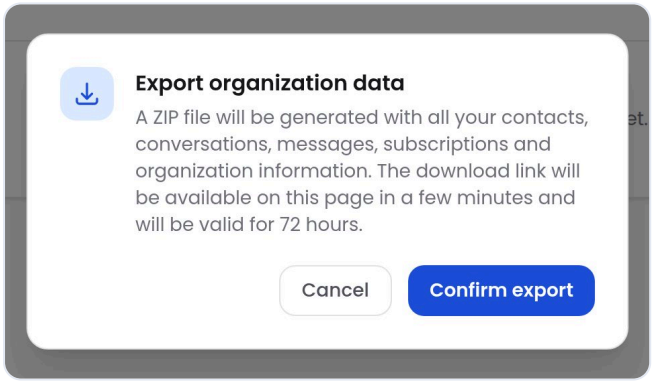
# Privacy and data

A copy of all your data, or its deletion, at the owner's request.

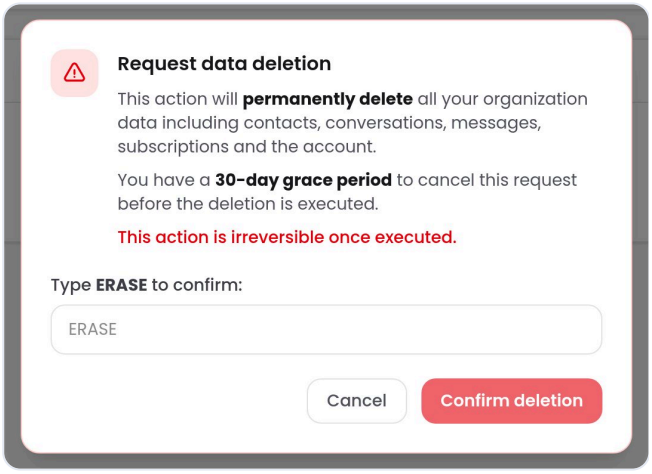
In **Settings** → **Privacy and data** the organization **owner** manages the organization's data in line with the GDPR (the European data protection regulation). For anyone who is not the owner, the page explains that only the owner can export or delete the organization's data.




Settings → Privacy and data: export or delete the organization's data.




Export organization data: a ZIP that is ready in minutes.




Request data deletion: a 30-day grace period and the word ERASE to confirm.

## Exporting the data

1. Click **Request export**. **Export organization data** opens.
2. Click **Confirm export**.
3. In a few minutes, the file appears in the **Request history** with the **Download ZIP** button.

The ZIP contains every contact, conversation, message, subscription and the organization's information. The download link is valid for 72 hours. Only one export can be in progress at a time.

## Deleting all the data

1. Click **Request data deletion**. The request dialog opens.
2. Read the notice: the action will permanently delete all of your organization's data, including contacts, conversations, messages, subscriptions and the account.
3. Type **ERASE** in the field. The **Confirm deletion** button is enabled only then.

You have a **30-day grace period**: until it ends, the request appears in the history with the **Cancel deletion** button. After that, the deletion is irreversible.

| History column | What it shows |
|---|---|
| Type | Export or Deletion. |
| Status | Pending, Processing, Completed, Cancelled or Error. |
| Grace until | Until when a deletion can be cancelled. |
| Processed / Download | When it finished and the ZIP link. |

In the demo we only open both dialogs and cancel them. For companies in the European Union, the Help Center has the data protection guide.

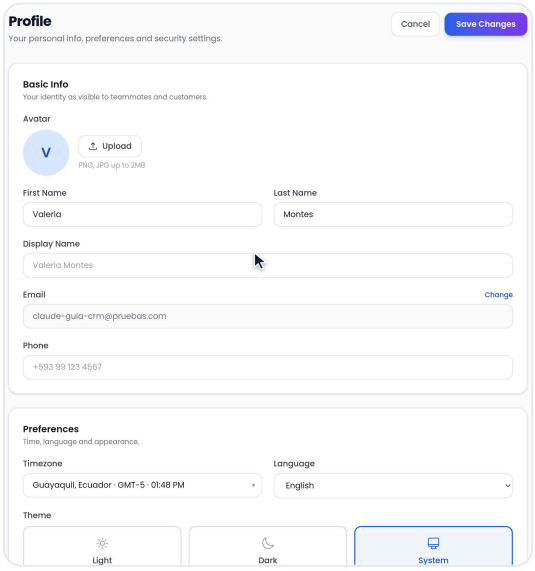
# 30

CHAPTER 30

# Your profile and your account

Your name, email, preferences and the organizations you belong to.

Open your avatar menu → **Profile**. At the top are **Cancel** and **Save Changes**, which save the basic information and the preferences.




Your profile: basic information and preferences.

### Basic information

- **Avatar**: **Upload** a PNG or JPG photo of up to 2 MB.
- **First Name**, **Last Name** and **Display Name**: how your teammates and customers see you.
- **Email**: your sign-in email (see below).
- **Phone**.

### Preferences

- **Timezone** and **Language** (Español, English, Português): just for you.
- **Theme**: **Light**, **Dark** or **System** (your computer's).
- If you work in more than one workspace, **Open the inbox in unified mode by default**.

## Changing your sign-in email

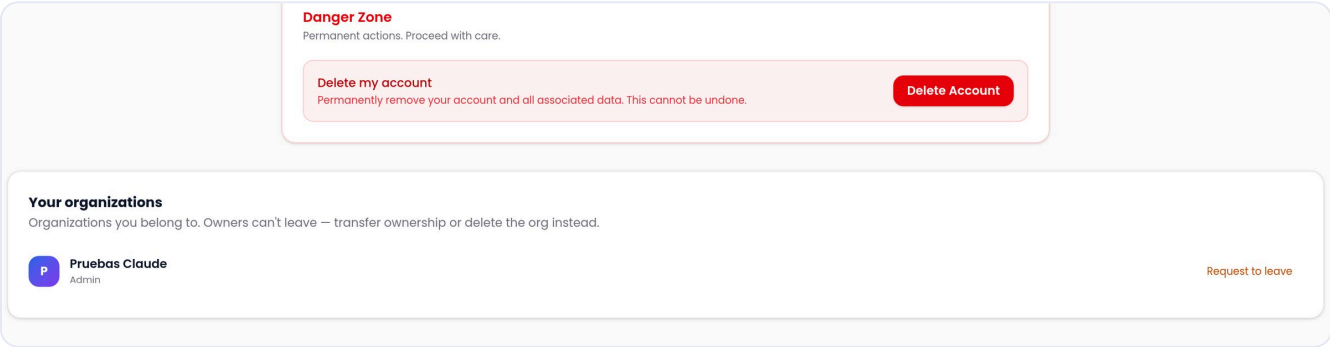



Changing the sign-in email asks for your current password.

1. Next to **Email**, click **Change**.
2. Type the new email and your current password, as confirmation.
3. Confirm the update. From the next time on, you sign in with the new email.

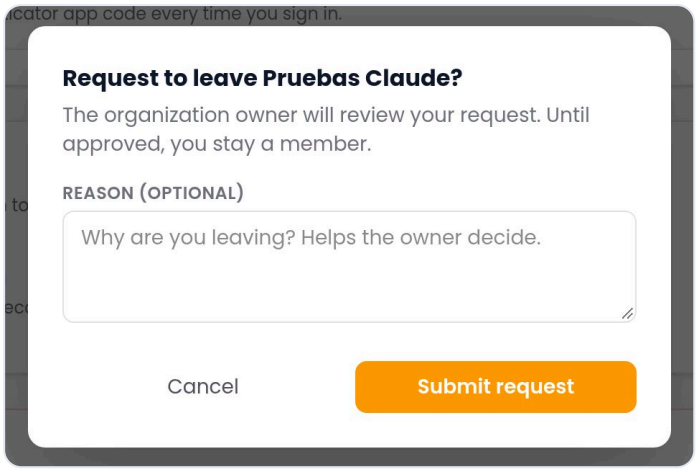
Further down in the profile are the **Password** (chapter 24), **Two-Factor Authentication** (chapter 20) and **Active Sessions** (chapter 25).

## Your organizations and the danger zone




Danger Zone and Your organizations, at the end of the profile.

- **Your organizations**: the organizations you belong to, with your role. With **Request to leave** you ask to leave one, with a **Reason (optional)** and **Send request**. Until the owner approves it, you are still a member; in the meantime you can **Cancel request**. Owners cannot leave: they first transfer ownership or delete the organization.
- **Danger Zone** → **Delete my account** (**Delete Account** button): deletes your account and all your associated data, and signs you out. It asks for your password and cannot be undone. If you are the only owner of an organization, you first have to cancel the subscription and transfer ownership.



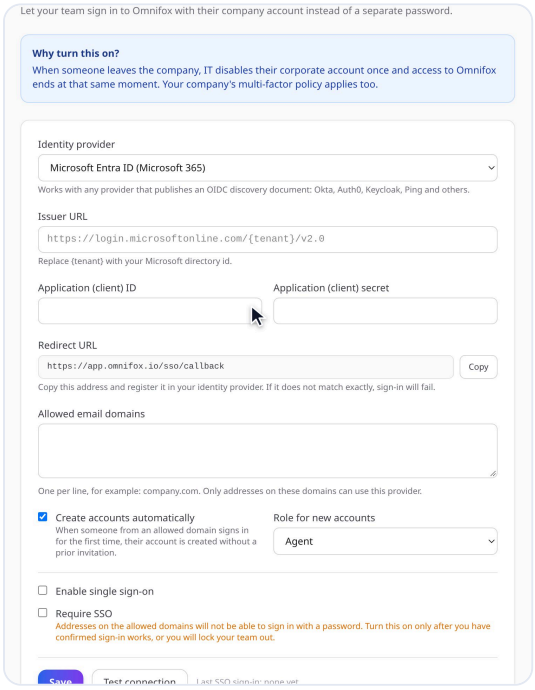

Requesting to leave an organization: the owner reviews your request.

CHAPTER 31

# 31 Single sign-on

Sign in with your company's corporate account.

On the plans that include it (from Crece up), **single sign-on** (SSO) lets your team sign in to Omnifox with the company's corporate account, instead of an Omnifox-specific password. When someone leaves the company, your IT team disables their corporate account once and they lose access to Omnifox at that very moment; your company's two-factor policy also applies.




Settings → Single sign-on (SSO): the identity provider and its details.

It is set up in **Settings → Single sign-on (SSO)**, with your identity provider's details:

- **Identity provider**: Microsoft Entra ID (Microsoft 365), Google Workspace or another provider compatible with OpenID Connect (OIDC), such as Okta, Auth0 or Keycloak.
- **Issuer URL**, **Application (client) ID** and the application secret (client secret), which your provider gives you.
- **Redirect URL**, with **Copy**: the address you must register with the provider.
- **Allowed email domains**, one per line: only addresses in those domains sign in through SSO.
- **Create accounts automatically** and the **Role for new accounts** (Agent or Admin).
- **Enable single sign-on** and, optionally, **Require SSO**.
- **Save** and **Test connection**.

**WATCH OUT**

Do not turn on «Require SSO» until you have checked that single sign-on works: with that option, addresses in the allowed domains can no longer sign in with a password. In the demo SSO is not configured; the page is only shown.

CHAPTER 32

# 32 Security best practices

Five habits that protect your account more than any setting.



The five best practices from the end of the video.

| | Practice | How, in Omnifox |
|---|---|---|
| 1 | **Give each person only the role they need.** | Member in the organization and Agent in their workspaces, except whoever really manages (chapters 10 and 13). |
| 2 | **Require two-factor authentication.** | Require two-factor authentication, in General or in Security (chapter 22). |
| 3 | **Remove or deactivate whoever leaves, on the same day.** | Remove in Members, or Deactivate in Workspace members (chapters 12 and 13). |
| 4 | **Check the audit log from time to time.** | General → View all, and Members → Activity (chapter 28). |
| 5 | **If you work from a fixed office, use the IP allowlist.** | Settings → Security (chapter 26). |

## Checklist for a new account

- Complete the organization record: time zone, language and contact details (chapter 2).
- Create one workspace per brand, branch or department, and give it its color (chapters 3 and 4).
- Invite the team with the right role and add them to their workspaces (chapters 9, 10 and 13).
- Set up teams and routing (chapters 6 and 15).
- Enter the business hours and an SLA policy (chapters 16 and 17).
- Turn on your two-factor authentication and then require it for everyone (chapters 20 and 22).

- Set the password policy and the session timeout (chapters 23 and 27).

## Troubleshooting

| What you see | What to check |
|---|---|
| I do not see **Members** in the Settings submenu | That screen belongs only to the account owner. An admin adds existing members to their workspaces from Workspace members (chapter 13). |
| An agent only sees **Notifications** in Settings | That is expected: each person only sees what their role allows them to open. |
| I cannot create another workspace | You reached the plan's workspace limit (the red notice says so). Change your plan in Billing. |
| The invitation did not reach the person | Check the email you typed and the spam folder; use Resend in Pending invitations. The link expires after 7 days. |
| It will not let me invite anyone else | There are no seats left on the plan. Remove whoever no longer works with you or upgrade the plan. |
| An agent does not see conversations they should | Check their inbox visibility with the gear in Workspace members and the teams they belong to. |
| Automatic assignment does not respect shifts | Turn on «Respect agent shift schedules» in Routing and check each person's Weekly schedule. |
| A person who is away still receives chats | Check in Workspace members that they have the away-until mark with the right date. |
| It asks for the verification code and I lost my phone | Sign in with Use a recovery code. If you do not have those either, ask the account owner or support for help. |
| The six-digit code does not work | Check that your phone's time is set to automatic: the code depends on the exact time. |
| Signing in always takes me to my profile | Your organization requires two-factor authentication and you do not have it: click Set up 2FA now (chapter 20). |
| My new password is not accepted | It does not meet the password policy: the message says what it is missing (chapter 23). |
| I cannot save the IP allowlist | The list does not include the address you are connected from. Add it first. |
| Someone was locked out by the IP list | They are signing in from another address. Add their address or empty the list. |
| It logs me out often | The Session Timeout is short. Raise it (up to 8 hours) in Security. |
| I do not see the audit log | You need to be the owner or an admin (or a workspace admin, for your workspace) and a plan that includes it. |
| I cannot export or delete the data | Only the organization owner can. |

## Frequently asked questions

### What is the difference between an organization admin and a workspace admin?

The organization admin configures the organization and all its workspaces. A workspace admin only manages that workspace: its members, teams and preferences.

### Can I have two owners?

No. There is only one owner; the others can be admins. Ownership can be transferred (chapter 12).

### Can a person be in several workspaces?

Yes, with a different role in each one if needed, and they can see them together with the unified inbox.

### Does removing someone delete their conversations?

No. The conversations stay in the workspace; the ones they had open become unassigned.

### Does two-factor authentication work without internet on the phone?

Yes. The authenticator app generates the code with the phone's clock, offline.

### How many times does a recovery code work?

Only once. If you used up several, generate new codes (chapter 21).

### Does the password policy force people to change their current passwords?

No. It applies when each person creates or changes their password.

### Can I export only my personal data?

The Privacy and data export covers the whole organization and is requested by the owner.

## Glossary

**Organization**
Your company in Omnifox: the plan, billing, members and the rules for everyone.

**Workspace**
An area of the organization with its own channels, contacts, conversations and automations.

**Owner**
The person who owns the account. There is only one.

**Role**
What a person can do: in the organization (Owner, Admin, Billing admin, User admin, Member) and in each workspace (Agent or Admin).

**Seat**
Each person taking a place in the plan.

**Team**
A group of people in a workspace to distribute and collaborate on conversations.

**Routing**
The rules that decide who handles each new conversation.

**SLA**
The response and resolution time you commit to.

**Two-factor authentication (2FA)**
Signing in with the password plus a six-digit code from a phone app.

**Authenticator app**
The phone app that generates the codes: Google Authenticator, Authy, 1Password...

**Recovery code**
A single-use code to sign in without the phone.

**Session**
Each browser or device where your account is open.

**IP address**
The address of the internet connection someone signs in from.

**CIDR range**
A way of writing a range of IP addresses, such as 192.168.1.0/24.

**Audit log**
The history of important changes in the organization.

**GDPR**
The European regulation on the protection of personal data.

**SSO**
Single sign-on: signing in with the company's corporate account.

**Need help?**

Write to us from the **Support** button in the app (have your account code at hand, chapter 2) 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**.