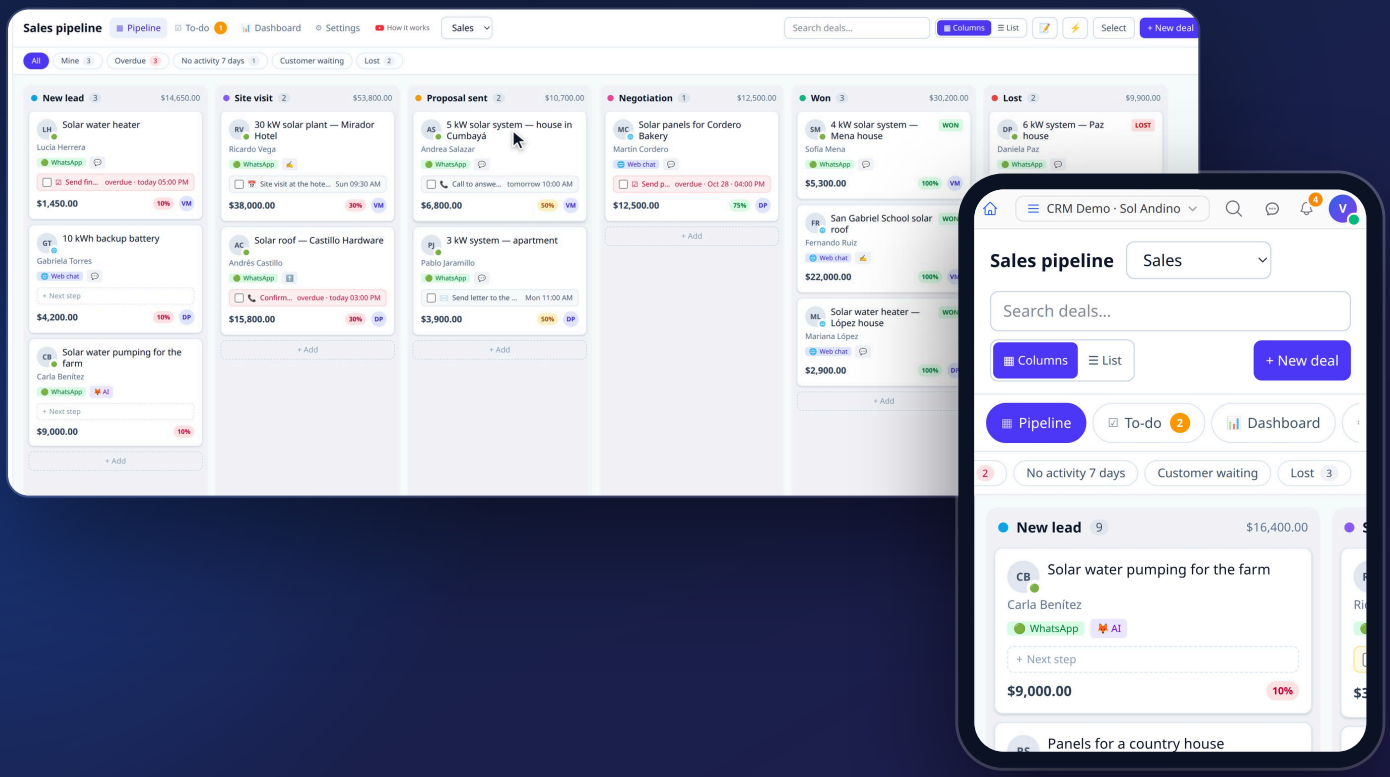
Omnifox

COMPLETE GUIDE · USER MANUAL

CRM

Every conversation with a customer, turned into a sale you can follow from the first question to payment. The pipeline and its deals, each deal's record tab by tab, your to-dos, the dashboard with the monthly goal, pipeline settings, the contact profile, contacts, forms, and how it all connects with chat, AI and workflows.



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How to read this manual

The screenshots are real Omnifox screens with a sample business: **Sol Andino**, a fictional company in Quito that installs solar panels, solar water heaters and batteries in homes and businesses. It works in the **CRM Demo · Sol Andino** workspace, with the **Sales** pipeline (New lead, Site visit, Proposal sent, Negotiation, Won and Lost) and two sellers, **Valeria Montes** and **Diego Paredes**. The customers — Andrea, Martín, Lucía, Ricardo and the rest— and their conversations are made up.

Button and field names are in **bold**, exactly as they appear on screen. Chapters 1 to 46 follow the order of the "CRM complete guide" video on the Omnifox YouTube channel and expand it with every option. Some features depend on your plan and your role (chapter 44).

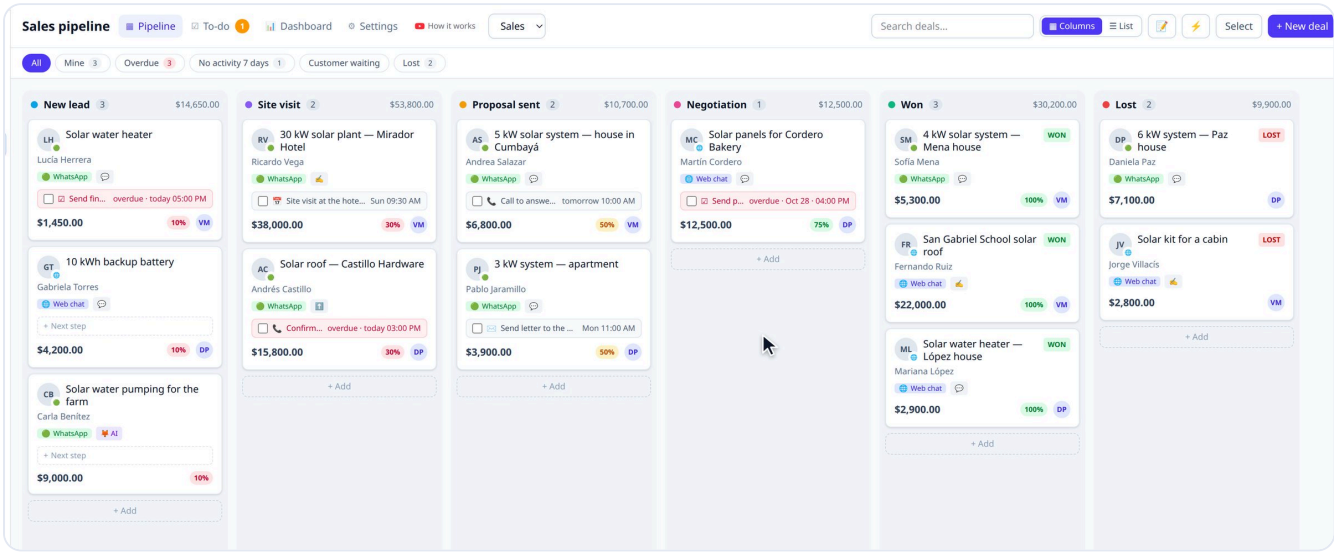
A

BEFORE YOU START

What the CRM is and how it thinks

Four ideas and one rule, and the CRM explains itself.

The Omnifox **CRM** is where every customer who shows interest becomes a sale you can follow to the end. It is not another app: it lives inside Omnifox, next to the chat inbox, and uses the same contacts, tags, team and AI. What happens in a chat shows up in the CRM, and what you do in the CRM shows up in the chat.



Sol Andino's pipeline: one column per stage and one card per deal.

The four ideas

Deal

A **sale in progress** with a customer: “5 kW solar system for Andrea's house”. It has an amount, a stage, an owner and a next step. It is born, moves forward and ends **won** or **lost**. On screen it is a **card**.

Contact

The **person** (or company) over time: their phone, their chats, their calls, everything they ever bought. A contact can have many deals over their lifetime; each one is a separate sale.

Pipeline and stages

The **pipeline** is the path a sale follows, split into **stages**: New lead → Site visit → Proposal sent → Negotiation → Won or Lost. Each stage is a column.

Next step

What needs to happen next with that sale, and when: “Call tomorrow at 10”. An open deal with no next step is a sale nobody is working.

The rule: one open deal per customer and pipeline

Each contact can have **only one open deal in each pipeline**. If you try to create another one for the same customer in the same pipeline —by hand, from the chat, on import, from a form or through the AI— Omnifox does not duplicate the card: it moves the existing one. So there are never two cards for the same sale. The same customer can, however, be in two different pipelines at once, for example **Sales** and **Maintenance**, and can have as many closed (won or lost) deals as you like.

Origin and channel: two different things

	It answers	Examples	Where you see it
Origin	How was the **card** born?	💬 From a conversation · ✍️ Added by hand · ⬆️ Imported · ⚙️ Automation · 📝 Form · 🦊 AI agent	The small badge on each card (chapter 3).
Channel	Where did the **customer** come from?	WhatsApp, Instagram, Messenger, Web chat, Lead form, Click to WhatsApp, Import, Manual...	The colored dot on the photo and the channel pill on the card; "Source" in the contact details.

A customer who wrote on WhatsApp (channel) can have a deal you added by hand (origin). The channel is copied from the contact when the deal is born; Omnifox sets the origin based on where the deal was created.

How it all fits

A customer arrives
Through a chat, a form on your website, an import or the AI.

→

The deal is born
A card in the first stage of the pipeline, with its contact.

→

It gets worked
Next steps, activities, quote, files and comments.

→

It closes
Won (it counts on the Dashboard) or lost, with its reason.

B

QUICK START

Your first 10 minutes

From an empty CRM to your first sale in motion.

The first time you open the CRM, Omnifox has already created a pipeline called **Sales** with five stages (Lead, Contacted, Proposal, Won and Lost). These steps get it ready to work:

1. **Name your stages** (2 minutes). Go to **CRM** → **Settings** and rename the stages so they describe what the customer does at each point: "Asked for a price", "Site visit", "Proposal sent", "Negotiation". Keep one flagged as **Won** and another as **Lost** (chapter 26).
2. **Review the loss reasons** (1 minute). At the end of Settings there are four: Price, No reply, Chose another option and Bad timing. Add any your industry needs and, if you like, a few win reasons (chapter 28).
3. **Set the monthly goal** (30 seconds, admins). On the **Dashboard** click **Set goal** and type how much you want to close this month (chapter 25).
4. **Load your sales in progress** (3 minutes). From the **Pipeline**, **New deal** for each one: pick the contact (or create it right there), the title, the amount and the stage (chapter 4). If you have a long list, import it from Contacts with "Create a CRM deal for each contact" (chapter 36).
5. **Give each one a next step** (2 minutes). On each card, **+ Next step**: what needs doing and when. Omnifox will remind you on time (chapters 3 and 24).
6. **Turn chats into sales** (1 minute). In the inbox, when a customer asks for prices, click **CRM** in the chat header and create the deal (chapter 40).

7 **Install a recipe** (30 seconds, admins). In the Pipeline, the lightning button: install "3 days without reply → follow-up task" so no customer is forgotten (chapter 21).

> **TIP**
> From tomorrow on, the routine fits in one sentence: check **To-do** every morning, move the cards when the customer moves forward, and look at the **Dashboard** every Monday.

What to look at depending on your role

If you are…	Your daily screen	Your job
A seller	To-do and the **Mine** filter in the Pipeline.	Create and move your deals, log calls and meetings, complete steps, close won and lost deals.
A supervisor or owner	The Dashboard and the Overdue and Customer waiting filters.	Review everyone's pipeline, reassign, see why deals are lost and how the goal is going.
An admin	CRM settings.	Pipelines, stages, reasons, automations, monthly goal and bulk deletes.

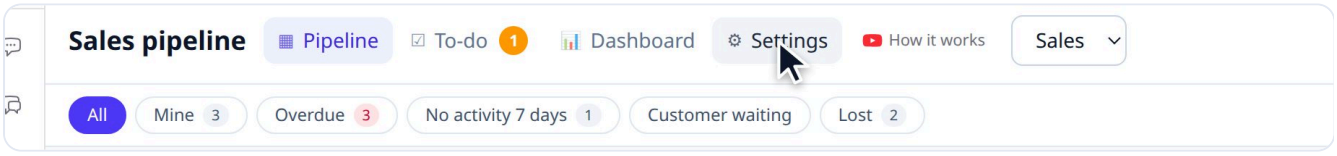
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CHAPTER 1

Where to find the CRM

The way into the CRM, its submenu and the workspace.

The CRM has its own entry, **CRM**, in the Omnifox left-hand menu. Click it and you land on the **Pipeline**. Right next to it is **Contacts**, the database of all your customers, which the CRM uses under the hood (chapters 32 to 38). On a phone, the CRM also shows up in the bottom bar.



The CRM header: the Pipeline · To-do · Dashboard · Settings submenu, How it works and the pipeline selector. Below, the quick filters.



On the right: search, Columns / List, Forms, Automations, Select and New deal.

The CRM submenu

At the top of every CRM screen you see the same submenu:

Item	What it is	Chapters
Pipeline	The sales board: your deals in columns, one per stage, or as a list.	2 to 21
To-do	Everything you need to do: next steps and tasks for your deals and contacts, as a list or a calendar.	22 to 24
Dashboard	The month's numbers: open, won, win rate, overdue steps, the goal and why deals are lost.	25
Settings	Pipelines, stages, loss and win reasons.	26 to 28

The **contact profile** (chapter 29) also shows this submenu, although it is not part of it: you reach it from a deal, from Contacts or from the chat.

The To-do number

Next to **To-do** there is a number: the sum of **your** overdue tasks and today's. Hover over it to see how many of each there are ("2 overdue · 1 today"). If it is red, something is late. It updates by itself when you complete or create to-dos.

How it works

The **How it works** button opens a panel with this guide's video, its chapters to jump to any topic, this PDF manual and the Help Center guide. It is on every CRM screen.

Everything is per workspace

Everything you see belongs to the **active workspace**, the one you pick at the top in the workspace selector. Each workspace has its own CRM, with its own pipelines, deals, contacts, goal and automations. If your company has two brands in two workspaces, each tracks its sales separately: the numbers never mix, and contact duplicates and merges never cross from one workspace to another.

> **NOTE**
> Can't see the CRM entry? Check that you are in the right workspace. The CRM comes with every Omnifox plan (chapter 44).

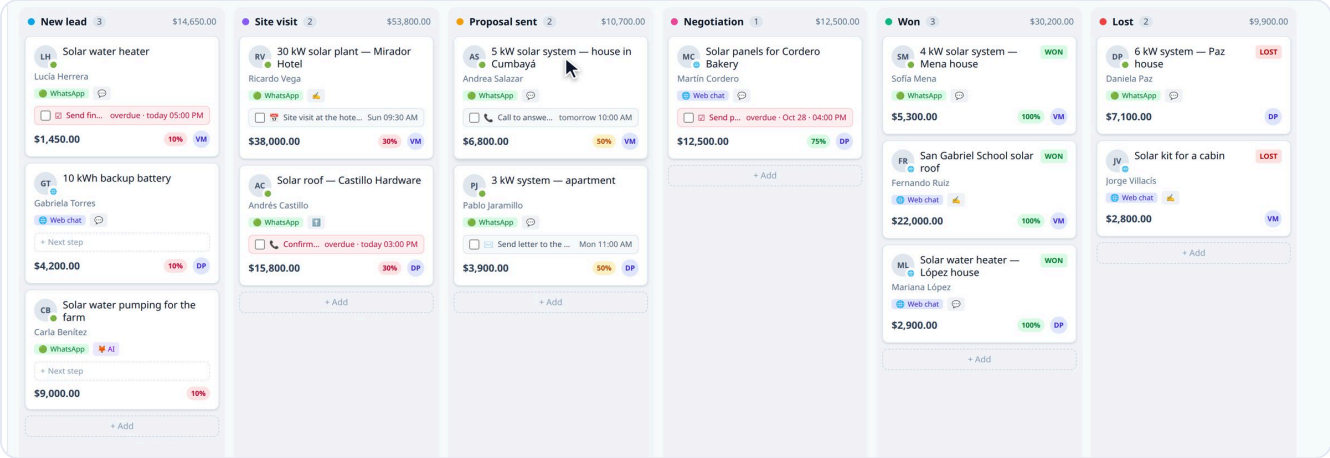
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CHAPTER 2

The pipeline: stages and columns

Your sales, in columns: one per stage.

The **Sales pipeline** shows your deals in columns, one per pipeline stage. At Sol Andino there are six: **New lead**, **Site visit**, **Proposal sent**, **Negotiation**, **Won** and **Lost**. Each card is a deal: a sale in progress with a customer.



The six stages of the Sales pipeline, each with its number of deals and its total value.

The header

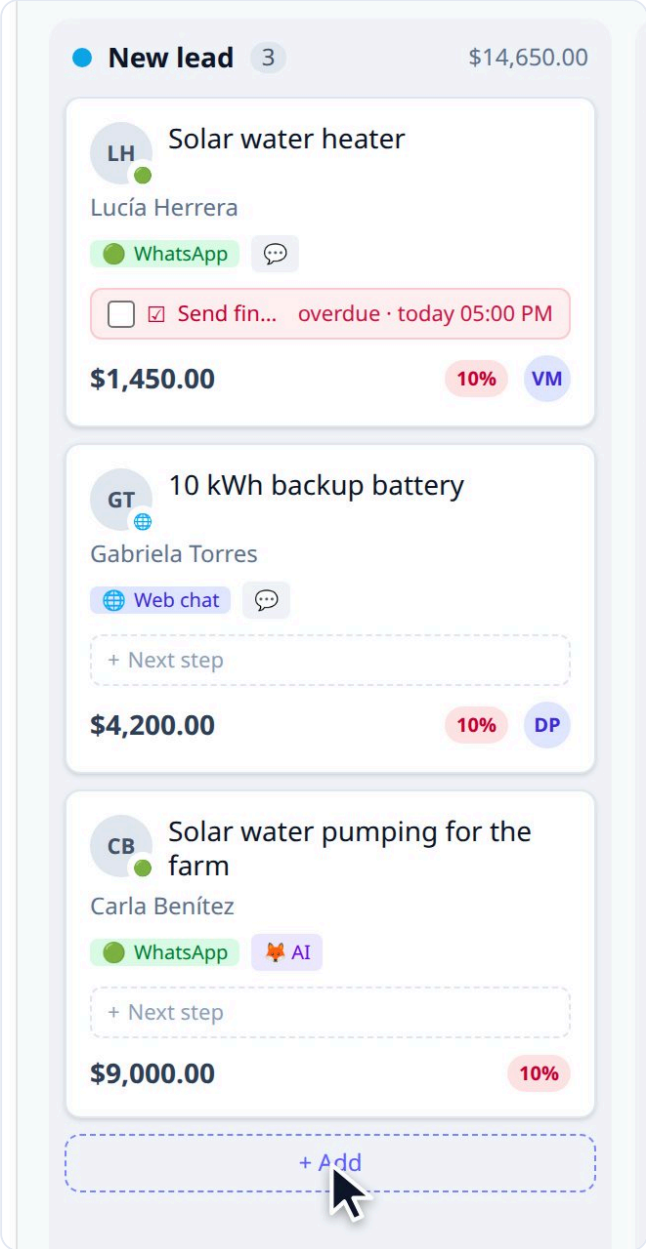
Control	What it does
Pipeline selector	If you have several pipelines (chapter 27), pick which one to see. The board reloads with its stages and deals.
Search deals...	Filters instantly by deal title, contact name or company (chapter 18).
Columns / **List**	Switches between the column board and the table (chapter 19). Omnifox remembers your choice in that browser.
⬇ (List only)	Exports what you are looking at to CSV (chapter 19).
📝 **Forms**	Opens the lead capture forms for your website (chapter 39).
⚡ **Pipeline automations**	This pipeline's automatic rules (chapter 21).
Select	Turns on checkboxes to work on several cards at once (chapter 20).
+ New deal	Opens the new deal form in the first stage (chapter 4).

The columns

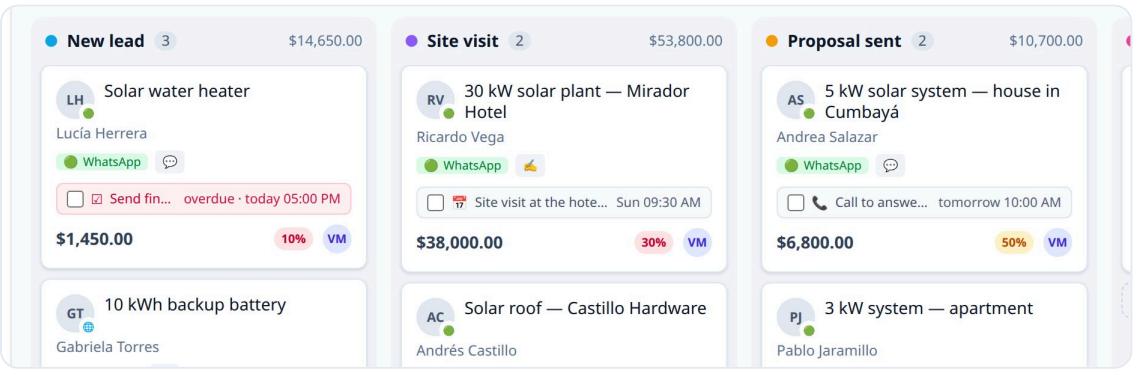
At the top of each column you see the stage's color dot, its name, **how many cards** it holds and **how much money they add up to**. So you know at a glance how much is in proposal or in negotiation. Both numbers respect the filters and the search: if you filter **Mine**, you only see your share.

At the bottom of each column, **+ Add** opens the new deal form with that stage already selected. It is the quickest way to load a sale that is already further along.

The **Won** and **Lost** columns keep the closed sales: won ones carry the green **Won** pill and lost ones the red **Lost** pill.



At the bottom of the column, Add creates a deal already in that stage.



At the top of each column: the color dot, the name, how many cards it holds and how much they add up to.

WATCH OUT

A column total uses the currency of its deals. If you sell in a single currency, the pipeline and Dashboard totals read directly; if you mix currencies, Omnifox adds them up anyway, so it is best to work everything in the same one.

NOTE

If there is no pipeline yet, the Pipeline says “No pipeline yet. Create one to get started.”. You will rarely see it: the first time, Omnifox creates the Sales pipeline by itself.

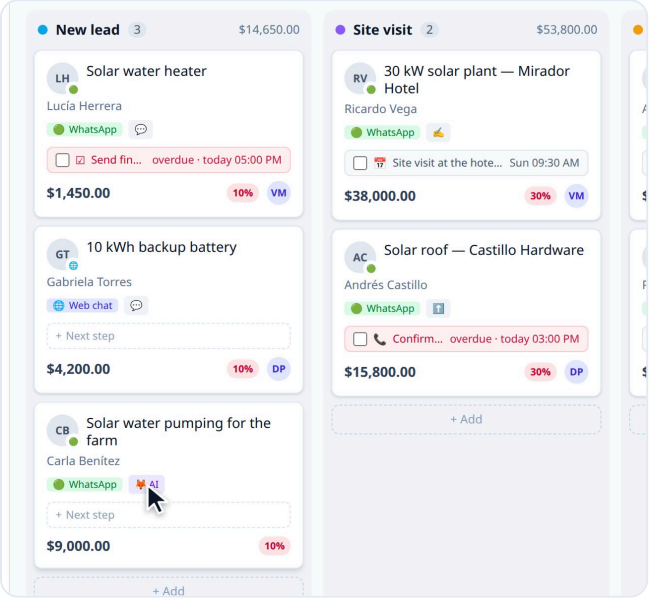
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CHAPTER 3

A deal card

Everything important about a sale, without opening it.

Each card sums up a sale. Read from top to bottom:



New lead and Site visit cards: channel, origin badge, next step, amount, probability and owner. Carla's has the little fox: the AI agent created it.

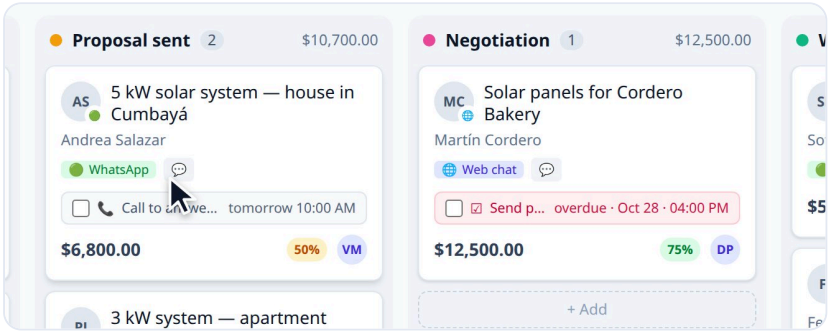
Part	What it shows
Photo with colored dot	The customer's photo (or initials) and their channel dot: WhatsApp, Instagram, Messenger, Web chat...
Title and contact	What the sale is about and with whom.
Channel pill	Where the customer came from: 🟢 WhatsApp, 🌐 Web chat...
Origin badge	How the card was born (table below). Hover over it for the full name.
Last message	The last thing the customer wrote and how long ago.
Next step	What needs doing and when, with its checkbox.
Bottom	Amount, probability of closing and owner.
Close warning	**Overdue** or **Due soon** if the expected close date has passed or is coming up.

How it was born: the origin badge

Badge	Meaning	When it appears
💬	**From a conversation**	You created it from the chat inbox (chapter 40).
✍️	**Added by hand**	You created it with New deal, with + Add or by duplicating another one.
⬆️	**Imported**	It was born when importing contacts (chapter 36).
⚙️	**Automation**	A workflow created it (chapter 42).
📝	**Form**	It came through a lead capture form on your website (chapter 39).
🦊 AI	**AI agent**	Your AI agent created it while handling the chat (chapter 41).

The customer's last message

If the customer wrote in, the card shows their last message and how long ago (“2 h ago”). Photos, audio or locations show up as 📷 Image, 🎤 Voice note, 📍 Location, and so on. One click on the message opens **the chat directly**, without opening the deal (hovering shows **View chat** →).

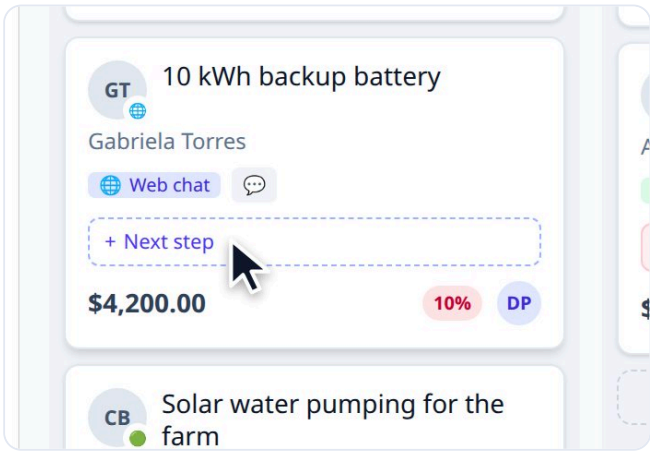


The customer's last message on the card: one click opens the chat without opening the deal.

The next step

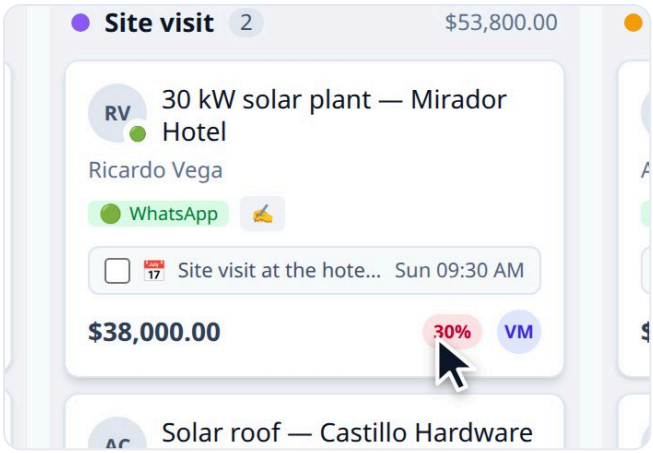
Below comes the next step: → **what needs doing · when**. It turns **red** if it is overdue, **amber** if it is today and grey if it is later on.

Tick the box to mark it done (**Mark as done**) and Omnifox offers, right away, to schedule the next one. If the card has no next step, the **+ Next step** button opens a short form right there, without opening the record: type, what needs doing, and date and time.



With no next step, the card offers “+ Next step” to create one right there.

The bottom of the card



The bottom of the card: amount, probability of closing and owner.

At the bottom, the **amount**, the **probability** of closing it (as a percentage) and the **owner**, with their initials. If the expected close date has passed, **Overdue** appears; if it is coming up, **Due soon**. These warnings only show on open deals: won and lost ones show neither the close warning nor the next step.

A click anywhere else on the card opens its **record** (chapter 7).

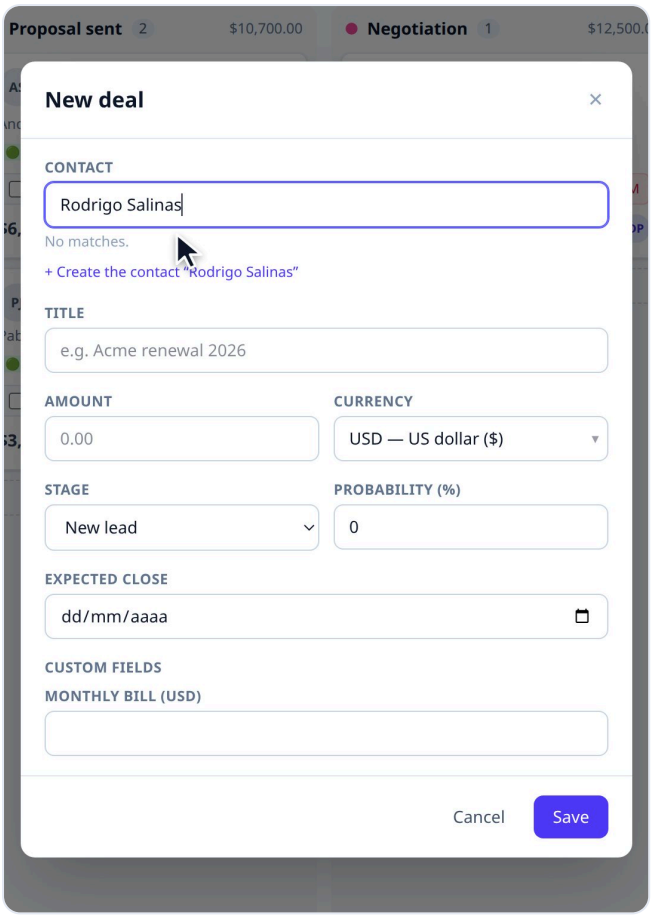
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CHAPTER 4

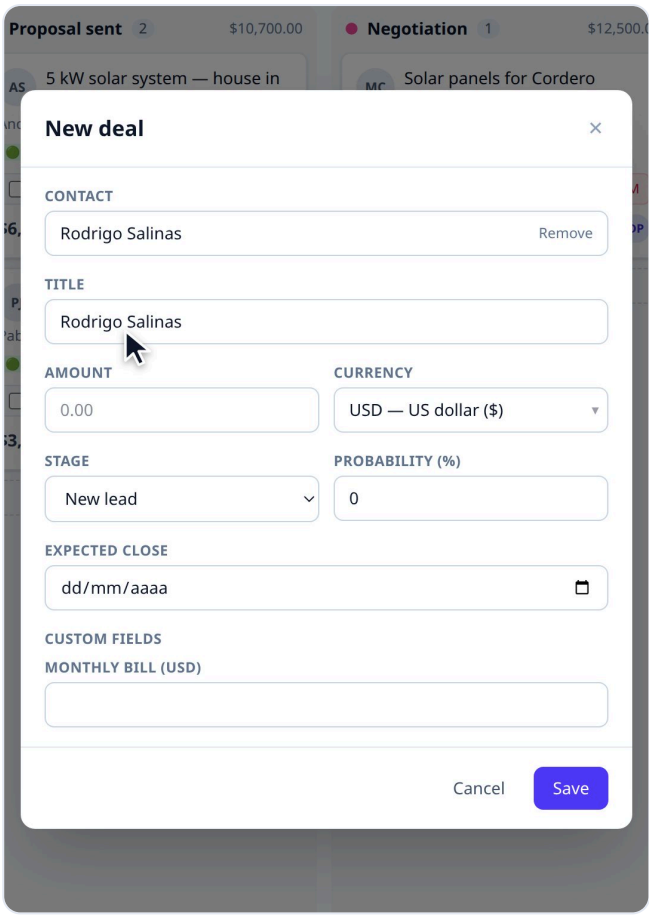
Creating a deal

Contact, title, amount and stage: just enough to start.

Click **+ New deal** (or **+ Add** at the bottom of a column). **New deal** opens.

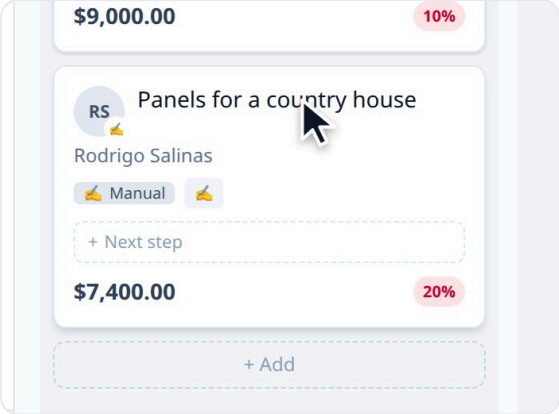


New deal: the contact is required. If it does not exist yet, "+ Create the contact...".



The rest of the form: title, amount and currency, stage, probability, expected close and custom fields.

1. **Contact** (required). Type in **Search by name, email or phone...** and pick the customer from the list. A sale with no customer cannot be worked; if you try to save without a contact, Omnifox warns you: "Pick a contact — a deal with nobody behind it cannot be worked.".
2. If the customer does not exist yet, the search says "No matches." and offers **+ Create the contact "..."**. The **New contact** block opens: name, **Phone (optional)** and **Email (optional)**. Click **Create and link**: the contact is created in Contacts, with the Manual channel, and linked to the deal.
3. **Title** (required): what the sale is about. For example, "Panels for a country house". Omnifox suggests the contact's name; change it to something that says what is being sold.
4. **Amount** and **Currency**: the estimated value of the sale (empty = 0) and the currency (it starts in the workspace's **Main currency**, chapter 26).
5. **Stage**: which column it starts in. If you came in through + Add, it is already selected.
6. **Probability (%)**: how likely it is to close, from 0 to 100.
7. **Expected close**: the date you expect to close it. If it passes without closing, the card will say Overdue.
8. **Custom fields**: if your workspace has deal fields (chapter 35), they show up here. If there are none, the **Manage** link takes you to create them.
9. Click **Save**. The card appears in its column, marked ✍ **Added by hand**.



The new card in its column, marked ✍ Added by hand.

Field	Required?	Can be changed later in
Contact	Yes	It cannot be changed: if you picked the wrong customer, delete the card and create it again.
Title	Yes	The record header.
Amount and currency	No (0 and the main currency)	Estimated value, in the sidebar; or the Products tab.
Stage	Yes (preselected)	By dragging the card or in the record's stage bar.
Probability	No (0 %)	The sidebar.
Expected close	No	The sidebar.
Owner	—	The sidebar (chapter 9). It starts with no owner, unless your workspace assigns automatically.

NOTE

If you pick a stage flagged as **Lost**, the reason dialog opens before the deal is created (chapter 17). It is useful to record sales that were already lost and that you want counted on the Dashboard.

WATCH OUT

If the customer already has an open deal in this pipeline, no new one is created: see the next chapter.

NOTE

The contact is required everywhere: on the web, in the mobile app and in the API. If a deal arrives without a contact, Omnifox doesn't create it and says the contact is required. A deal that already has a contact can't have it removed either. And if the app, the AI or an automation creates it without a currency, it starts in the **Main currency** (chapter 26).

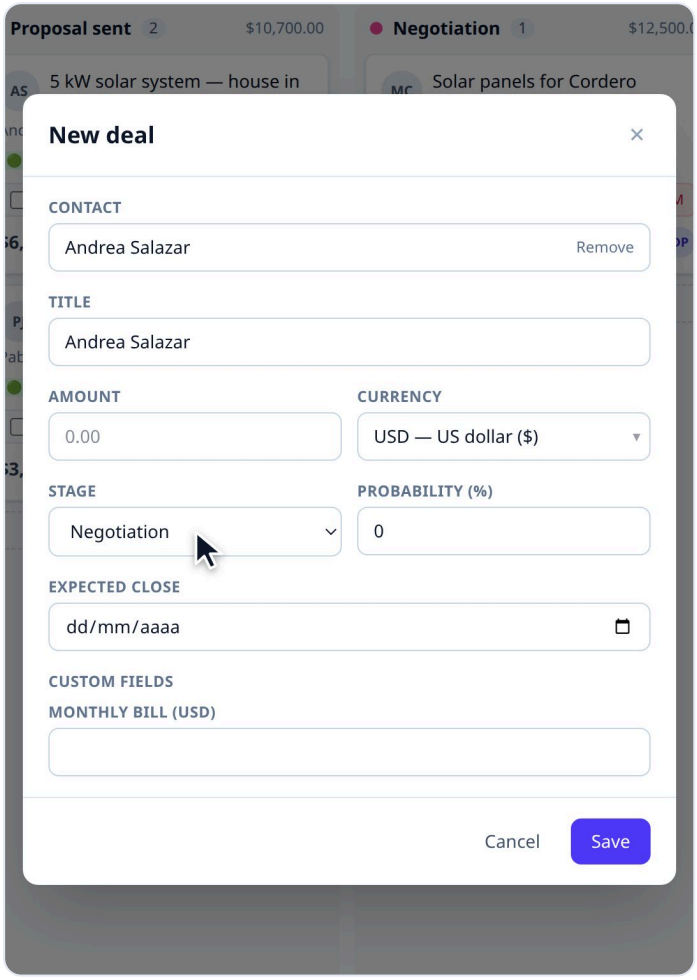
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CHAPTER 5

One open deal per customer and pipeline

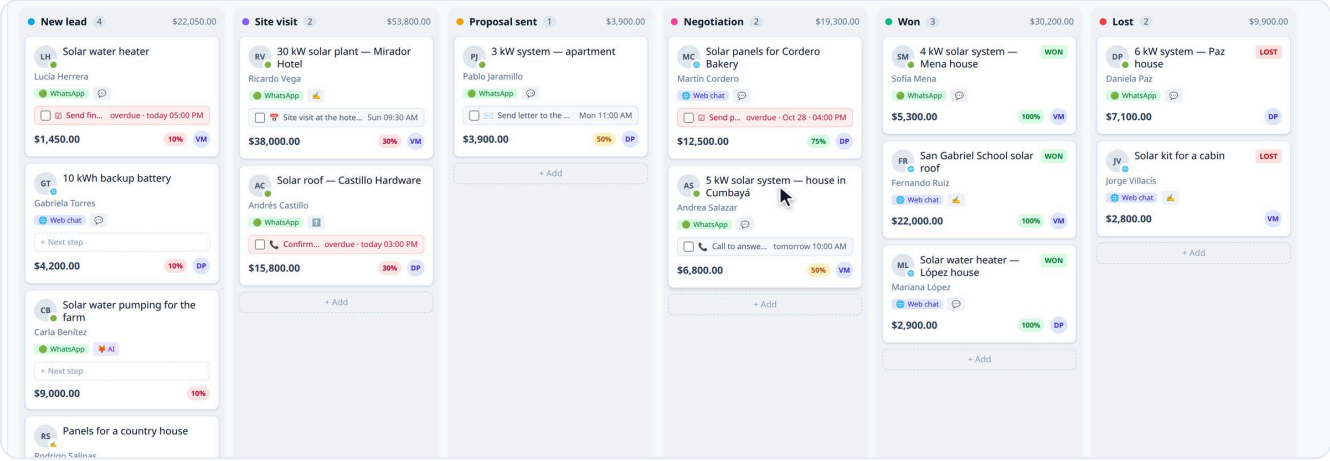
The rule that prevents repeated cards.

Each customer has **only one open deal per pipeline**. If you try to create another one for Andrea, who already has one in Proposal sent, Omnifox does not duplicate the card.



A new deal for Andrea, who already had an open one in the Sales pipeline.

Instead, it tells you she already had an open deal in this pipeline and that it was moved to the stage you picked (“Negotiation”), with an **Open the deal** button to go straight to its record. The existing card moves to the stage you chose and keeps everything: its history, its activities, its files and its comments.



Omnifox did not duplicate the card: it moved the existing one to the chosen stage.

Where the rule applies

From	What happens if there is already an open one
New deal / + Add	The existing one moves to the chosen stage and the notice appears.
The chat (CRM button)	The dialog warns you beforehand: “already has an open one — it will be moved”.
Importing contacts	No new deal is created; the contact is updated or skipped as you choose.
Lead capture forms	The open deal is reused.
AI agent	It reuses it and only moves it forward if the requested stage is further along; it never moves it back.

What you can do

- Have the same customer in **two different pipelines** at once: for example, a new sale in Sales and a panel cleaning contract in Maintenance.
- Have many **closed** deals: once one is won or lost, the customer is free for a new one in that pipeline.
- Duplicate a card on purpose with **Duplicate card** (chapter 9), for example for a second proposal.

> **TIP**
>
> If the customer buys again after a won sale, create a new deal: that way each sale keeps its own amount and date, and the contact profile adds up everything they bought from you.

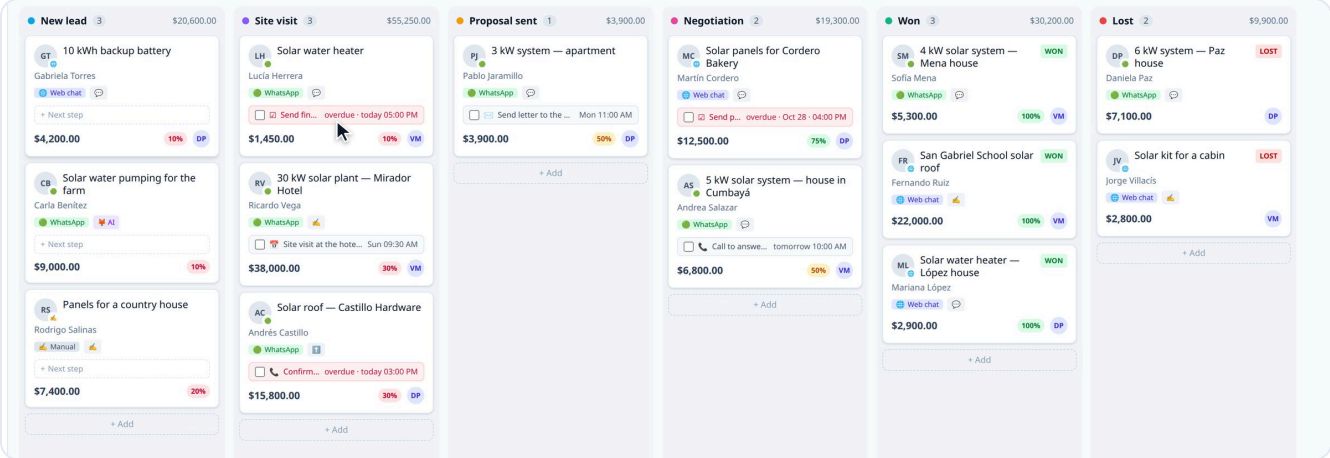
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CHAPTER 6

Moving between stages

Drag, drop, done.

To move a sale forward, **drag the card** to the next column. The change is saved when you drop it, and your teammates see it **live**, without reloading the page: if Diego moves a card, you see it move on your screen. If saving fails, the card goes back to where it was by itself.



Dragging a card to another column changes its stage; the team sees the change live.

If you drop it on…	This happens
An open stage	It changes stage. The change is recorded in the History (“Stage: Proposal sent → Negotiation”) and triggers that stage's automations.
Won	It is won instantly, with today's close date. No reason is asked (that is what Mark won is for, chapter 16).
Lost	The reason dialog opens first (chapter 17). If you cancel, the card stays where it was.

You can also change stage without dragging: from the record's **stage bar** (chapter 7), from the chat pill (chapter 40), with **Move to stage** in bulk (chapter 20) or from the mobile app (chapter 43).

> **TIP**
> Move the card when the **customer** moves forward, not when you do something. “Proposal sent” means the customer already has it; if you are still preparing it, it stays in the previous stage with the next step “Send proposal”.

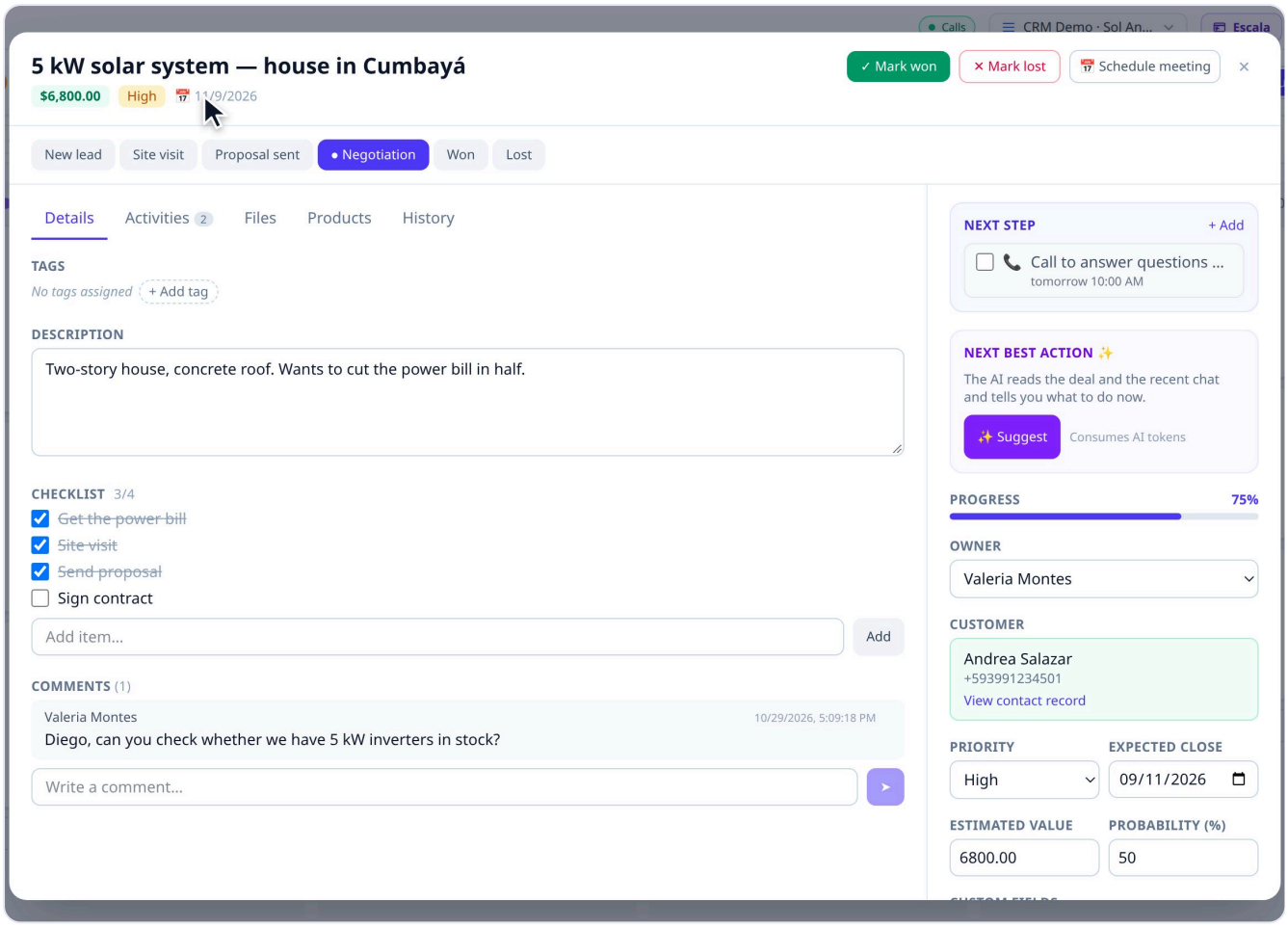
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CHAPTER 7

The deal record

Everything about a sale in a single window.

Click a card to open its **record**: a window on top of the pipeline with everything about that sale. Close it with the ✕ or the Esc key.



The deal record: header, stage bar, tabs on the left and sidebar on the right.

The header



The header: editable title, amount, priority, expected close, Mark won, Mark lost, Schedule meeting and the stage bar.

Element	What it does
Title	Edit it right there: click, type and leave the field.
Quick facts	The **amount** with its currency, the **priority** (Low, Normal, High or Urgent) and 📅 the **expected close**.
✓ **Mark won**	Closes the sale as won (chapter 16).
✕ **Mark lost**	Opens the loss reason dialog (chapter 17).
📅 **Schedule meeting**	Opens the Calendar booking dialog with the customer already filled in (chapter 15).
Stage bar	All the pipeline's stages, with the current one highlighted. Click another to move the deal, just like dragging it. If you pick Lost, it asks for the reason.
Pill and ↺ **Reopen**	On a closed deal, instead of the close buttons you see "✓ Won" or "✕ Lost" (hover for the close date) and the Reopen button.

The five tabs

Tab	What it holds	Chapter
Details	Tags, description, checklist and team comments.	8
Activities	Calls, meetings, notes, emails and tasks, with reminders (it has a counter).	11
Files	Proposals, photos, bills and contracts (it has a counter).	12
Products	The quote built from your catalog.	13
History	Everything that happened to the deal.	14

On the right is the **sidebar**, with the next step, the AI, the progress, the owner, the customer and the sale's data (chapter 9).

No Save button

The record has **no Save button**: every change saves itself when you leave the field (or when you pick an option from a list). While it saves you see "Saving...". If something fails, "Could not save. Please try again." appears and the field goes back to its previous value.

> **TIP**
> Every deal has its own link: alerts, To-do and the contact profile open the Pipeline with the record already open, switching to the right pipeline if needed. You can copy that link and send it to a teammate.

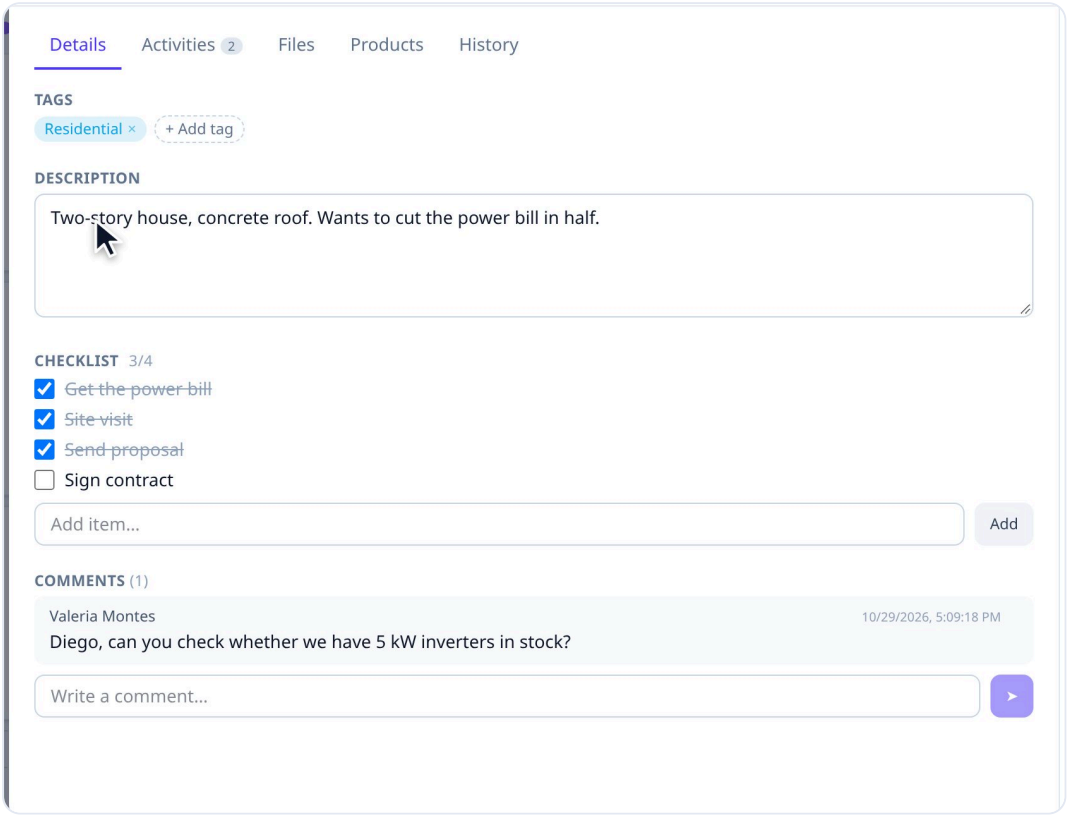
08

CHAPTER 8

Details: tags, description, checklist and comments

What the team needs to know about this sale.

The **Details** tab is the first one you see when you open the record.



Details: tags, description, checklist and comments.

Tags

Tags are the same ones you use in the inbox and on contacts. Click **+ Add tag**, search for one or type a new name to create it. Each tag shows up as a pill with its × to remove it. With no tags, it says “No tags assigned”.

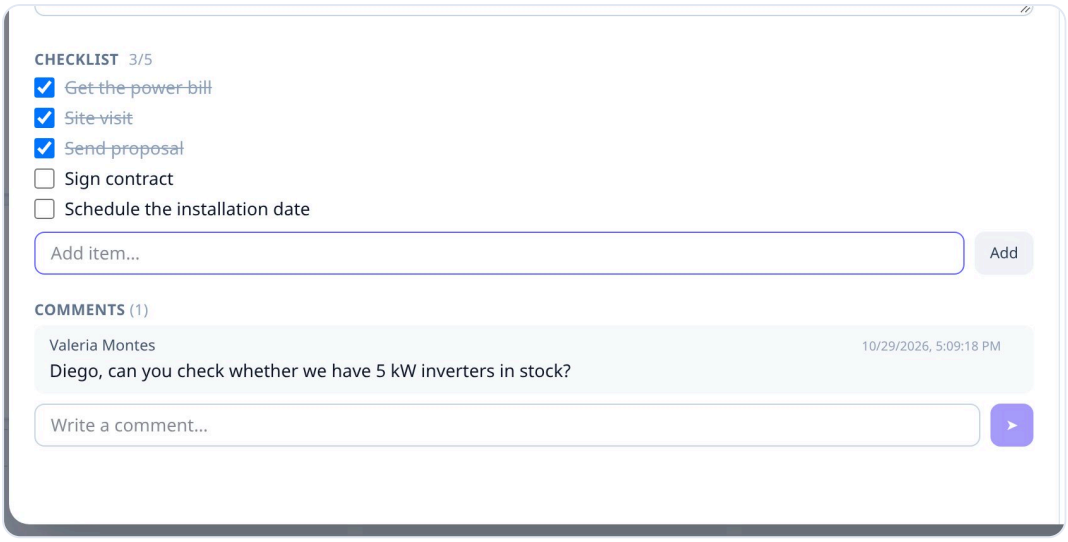
Examples at Sol Andino: **Residential**, **Business**, **Urgent**. Deal tags belong to this sale; contact tags (chapter 34) belong to the person.

Description

What the sale is about, in your own words: “Two-story house, concrete roof. Wants to cut the power bill in half.”. It saves when you leave the field.

Checklist

This customer's steps, so nothing is forgotten. Type in **Add item...** and click **Add**. Tick each item as you go (it gets crossed out) or delete it if it is not needed. At the top you see the progress, for example “3/5”.

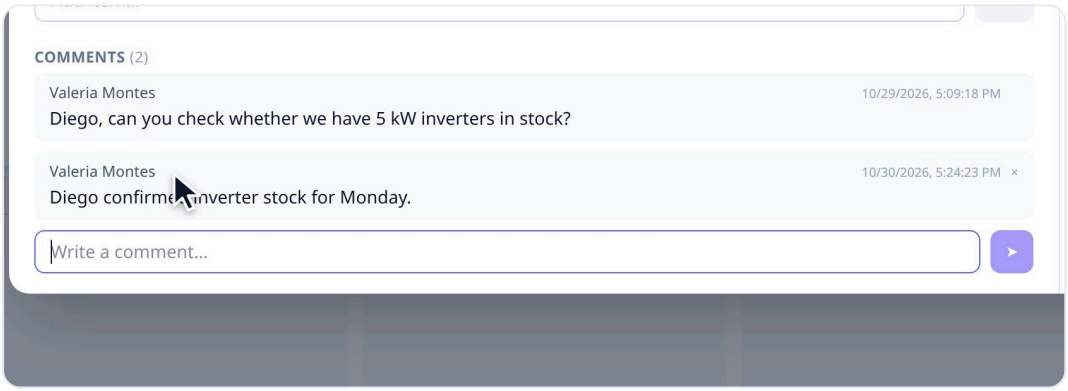


The checklist with a new item; its progress moves the progress bar on the right.

The checklist progress moves the **Progress** bar in the sidebar. Sol Andino always uses the same checklist: Get the power bill, Site visit, Send proposal, Sign contract.

Comments

For talking to your team about this sale, without the customer ever seeing it. Type in **Write a comment...** and click the send button. Each comment shows who wrote it and when, and the counter “Comments (2)”.



Internal comments, with author and date. The customer never sees them.

> **NOTE**
> Only the **author** of a comment can delete it. That way nobody deletes what someone else said.

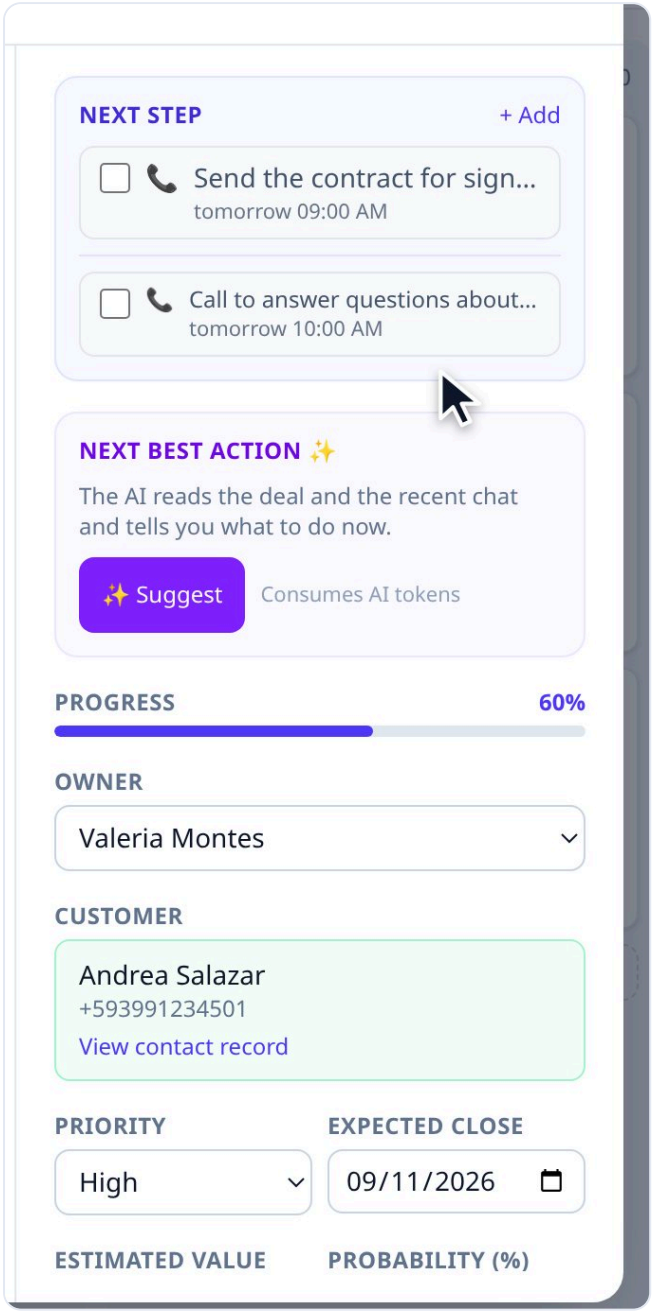
> **TIP**
> Use comments for what the next person to take the sale needs to know: “Prefers to be called in the afternoon”, “Diego confirmed inverter stock for Monday”.

09

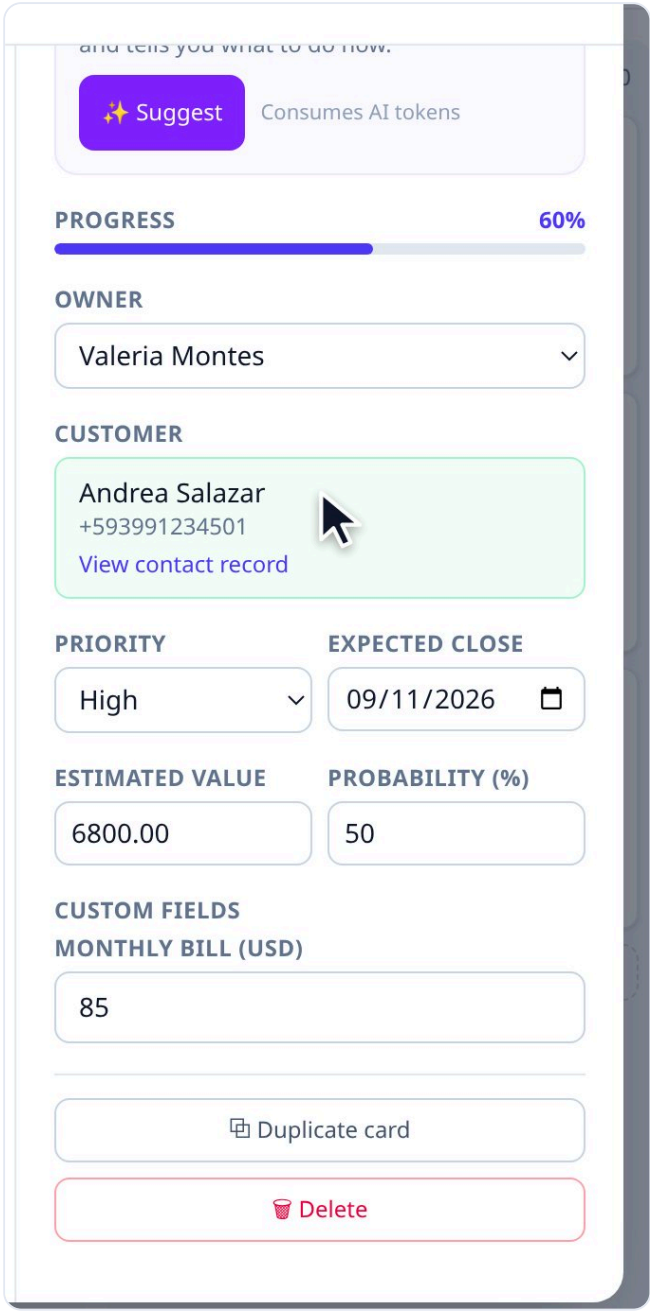
CHAPTER 9

The record sidebar

The next step, the owner and the sale's data.



The sidebar: next step, Next best action, progress, owner and customer.



Further down: priority, expected close, value, probability, custom fields, Duplicate card and Delete.

Next step

The sidebar starts with what matters most: **what needs to happen now**. If there is no pending step, Omnifox says so plainly: **"No next step: nobody is working this deal."**. **+ Add** opens a short form:

Field	What you enter
Type	Call, Meeting, Task, Email or Note.
What needs to happen?	For example, “Call to quote”.
Date and time	Tomorrow at 9:00 by default.

Click **Save**: the step is created as an activity of this deal, with a **reminder one hour before**, and it also shows up on the card and in To-do. If there are several pending steps, the first one is shown large and the rest as a list, each with its checkbox.

Next best action ✨

The AI reads the sale and the chat and tells you what to do (chapter 10).

The sale's data

Block	What it is
Progress	The percentage of the checklist completed. With no checklist, it shows the probability.
Owner	Who handles the sale. Pick anyone on the team or “Unassigned”. It saves when you pick.
Customer	The contact's name and phone, and the **View contact record** link, which opens their full profile (chapter 29).
Last message from the customer	The last thing they wrote, with the **Open conversation** button.
Priority	Low, Normal, High or Urgent.
Expected close	The date you expect to close it.
Estimated value	The sale amount.
Probability (%)	From 0 to 100.
Custom fields	Your workspace's deal fields, for example “Monthly bill (USD)” or “Roof type” (chapter 35).

Duplicate and delete

⧉ **Duplicate card** creates a copy, “(copy)”, in the same stage, at the end of the column, always open and marked as added by hand. It is handy for a second proposal to the same customer or for a similar sale.

🗑 **Delete** asks “Delete this deal?” and explains that it is removed from the pipeline and from reports, and that if the deal just didn't happen you should mark it as lost instead: it stays in the history and can be reopened. You get three buttons: **Cancel**, **✕ Mark lost** and **🗑 Delete**.

> **WATCH OUT**
> Only delete what was loaded by mistake (a test, a duplicate). If the sale didn't happen, mark it **lost**: that way it counts in your win rate and in “Why we lose”, and you can reopen it if the customer comes back.

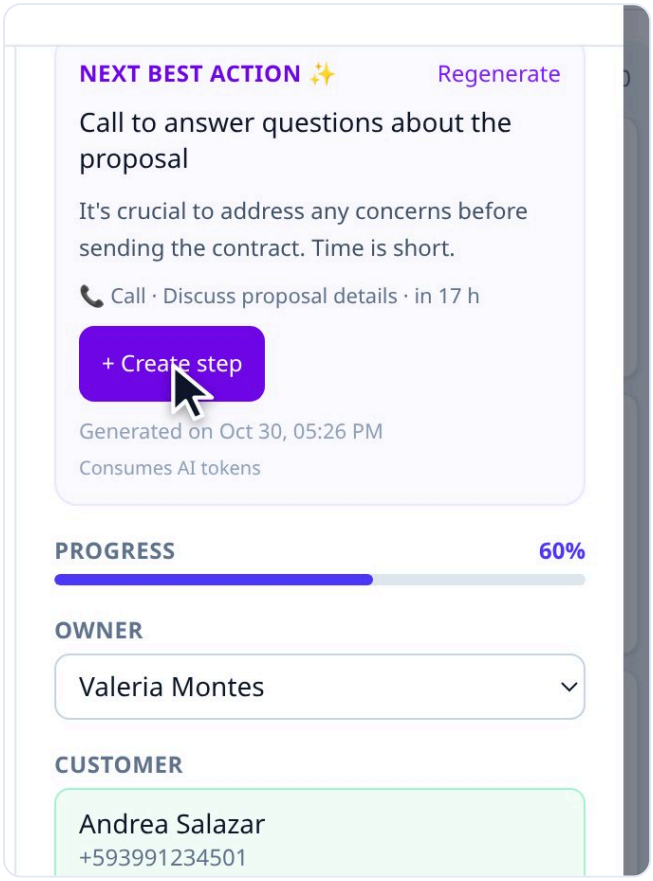
10

CHAPTER 10

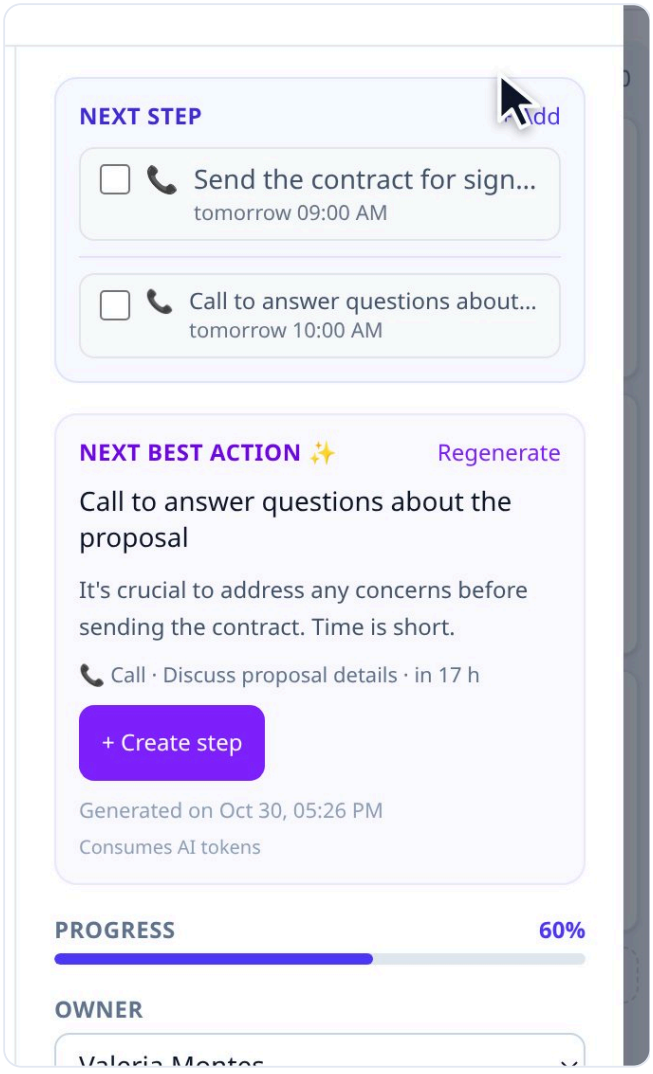
Next best action with AI

The AI reads the sale and the chat, and tells you what to do now.

In the sidebar, **Next best action** ✨ asks the AI to read the deal —stage, amount, steps, activities, comments— and the customer's **recent chat**, and tell you what to do now. Click ✨ **Suggest**; while it works it says “Thinking...”.



The AI's suggestion: what to do, why, and a step ready to create.



With “Create step”, the suggestion is scheduled as the next step.

What it suggests

Part	What it is	What you do with it
What to do	A concrete action, for example “Call to clear up questions and send the contract”.	Read it.
Why	The reason, based on what the customer said.	Decide whether you agree.
Ready step	Type, title and when: “Call · Call Andrea Salazar · in 8 h”.	**+ Create step** schedules it as the next step, with its reminder.
Message draft	If it is worth writing to the customer, a suggested message.	💬 **Send via chat** copies it to the clipboard and opens the conversation.

Send via chat never sends anything by itself: it copies the draft and opens the chat (“Draft copied. Opening the chat... paste it and review before sending.”). You decide whether to send it, change it or not.

What it costs

The suggestion is saved with its date (“Generated on ...”): reopening the record **costs nothing**. **Regenerate** asks for a new suggestion and does use AI tokens from your plan, from the CRM AI allowance. If the allowance is used up, you see that AI is unavailable because your plan's monthly AI allowance is used up or your balance is too low.

> **TIP**
> Next best action works best when the deal has its chat and activities up to date. With an empty card, the AI has little to go on.

> **NOTE**
> CRM AI depends on your plan: it comes with Crece, Escala and Exclusivo; on Lite, Impulsa and Conecta it only works with pay-as-you-go overage turned on (chapter 44).

> **NOTE**
> If your plan doesn’t include CRM AI, or this month’s AI allowance is used up and there’s no balance, the ✨ **Suggest** button is disabled and the reason shows below it: “Your plan does not include CRM AI.” or “This month’s AI allowance is used up and there is no balance to continue.”, with the **See plans and balance** link. So you know why before you click.

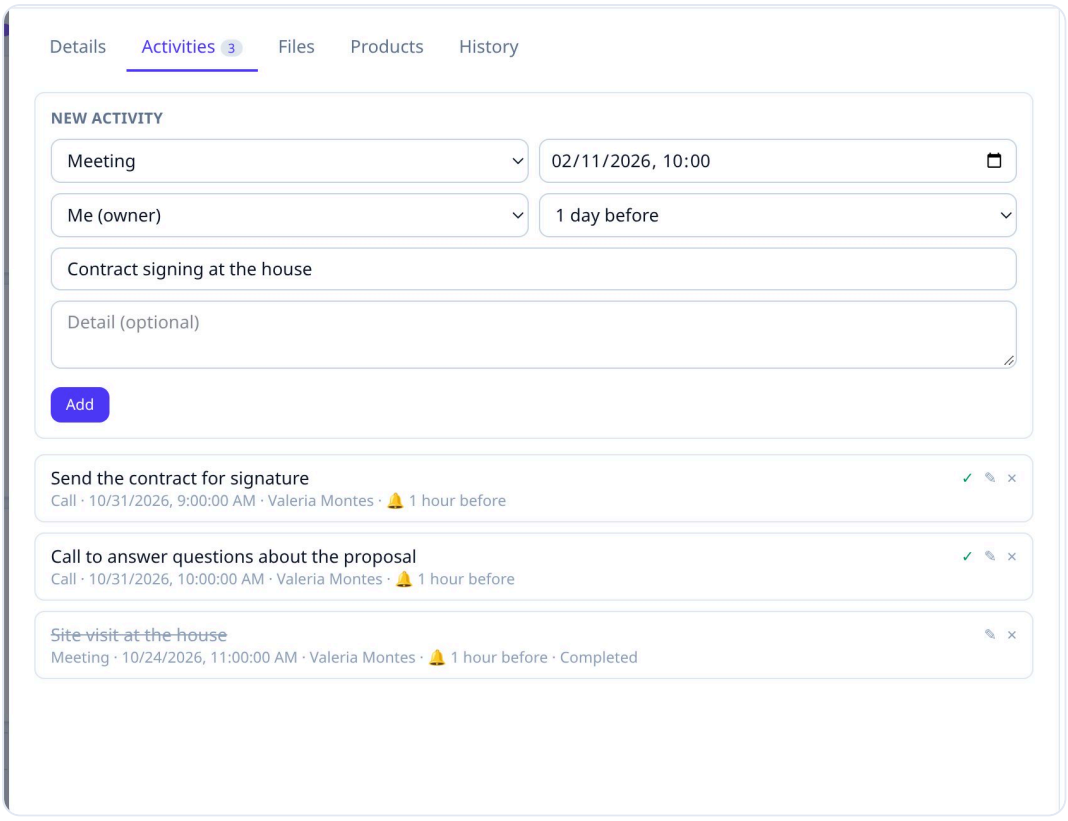
11

CHAPTER 11

Activities: calls, meetings, notes and tasks

This sale's schedule.

The **Activities** tab keeps everything that was done and everything still to do with this customer for this sale. At the top is the **New activity** form; below, the list.



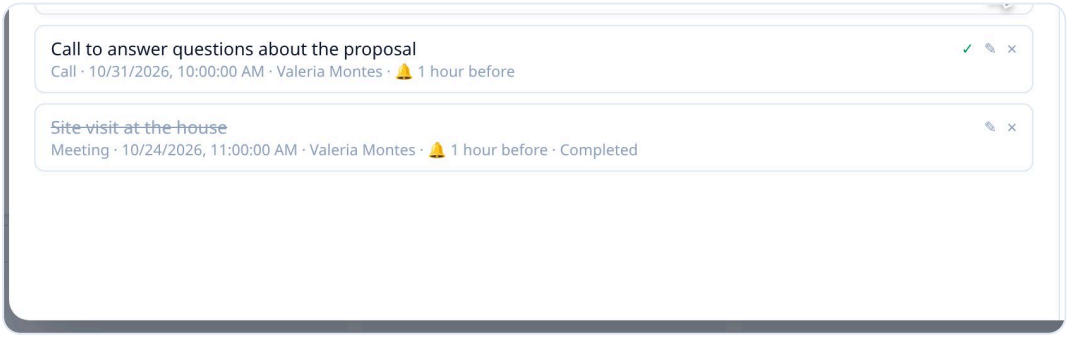
Activities: the New activity form and this sale's list of activities.

New activity

Field	Options
Type	**Note**, **Call**, **Meeting**, **Email** or **Task**.
Owner	**Me (owner)** or anyone on the team. They get the reminder.
Reminder	**No reminder**, **At the exact time**, 5, 15 or 30 minutes before, 1 or 2 hours before, 1 or 2 days before.
Date and time	When it is (or when it is due, for a task).
Summary	The title: “Contract signing at the house”.
Detail (optional)	Anything that needs explaining.

Click **Add** and the activity goes into the list. Dated ones also show up in To-do (chapter 22).

The list



Each activity with its type, date, owner and reminder, plus the complete, edit and delete actions.

Each activity shows its type, summary, date, owner and 🔔 reminder. Ones past their time without being done say · **Overdue**; done ones, · **Completed** (and are crossed out). The actions:

Action	What it does
✓ **Mark complete**	Marks it done. It leaves To-do and stops reminding.
✎ **Edit**	Opens the form as "Edit activity" with its data; click Save. If you change the date or the reminder, **the alert is rescheduled automatically**.
🗑 **Delete**	Asks "Delete this activity? This cannot be undone.".

Use…	To…
Note	Record something, with no date: "Prefers to be contacted in the afternoon".
Call	A call made or to be made. (To log a call with its duration, use Call on the contact profile, chapter 29.)
Meeting	A visit or a meeting. If the customer should get the appointment, use Schedule meeting (chapter 15).
Email	An email you sent or need to send.
Task	Anything to do with a deadline.

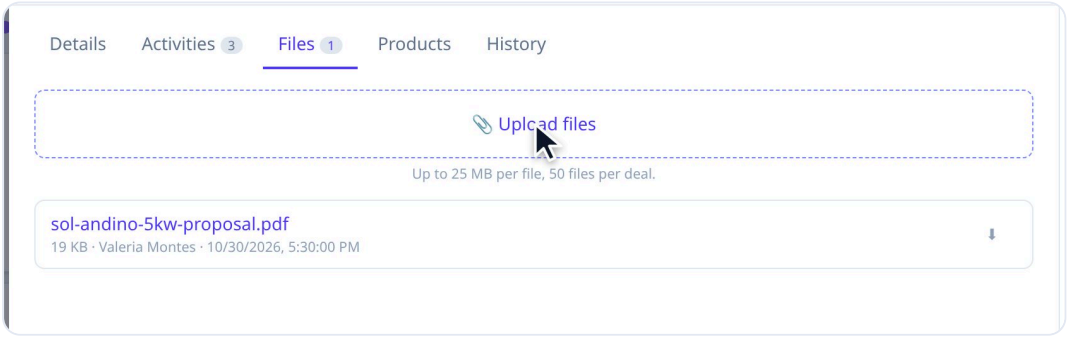
12

CHAPTER 12

Deal files

Everything about this sale, stored with it.

In **Files** you upload everything related to the sale: the proposal, photos of the roof, the power bill, the signed contract. Click 📎 **Upload files** and pick one or more.



Files: Upload files and the deal's list of attachments.

Limit	Value
Size per file	Up to 25 MB.
Files per deal	Up to 50.
Types	Documents, images, spreadsheets, PDFs… For security, some types (executables, for example) are rejected.

Each file shows its name (one click opens or downloads it), its size, who uploaded it and when. They stay with the deal, at hand for anyone on the team who picks it up. With no files it says “No attachments.”.

> **NOTE**
> Files are stored in your account's storage, inside your workspace: nobody from another company can see them.

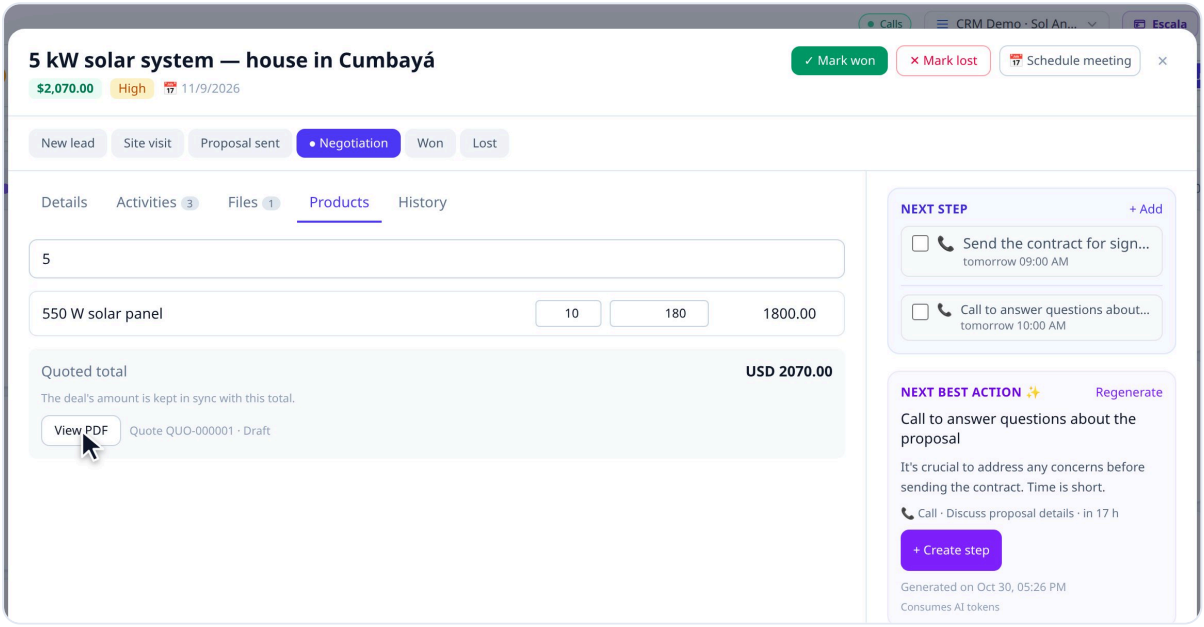
13

CHAPTER 13

Products and quote

The quote, built from your catalog.

The **Products** tab builds this sale's quote from the products and services in your Omnifox **catalog**.



Products: the quote built from the catalog; the quoted total becomes the deal's amount.

1. Type in **Search the catalog...** and pick a product. It is added as a line, at its list price.
2. Adjust each line's **quantity** or **price**. Remove any you don't need.
3. Check the **Quoted total**: it is the sum of the lines.
4. Click **View PDF** to get the quote ready to send to the customer.

Sol Andino, for example, quotes Andrea ten 550 W solar panels, a 5 kW hybrid inverter, and installation and commissioning.

The total overrides the amount

As the screen says, “The deal's amount is kept in sync with this total.”: as soon as you add products, the deal's **amount** becomes the quoted total. That way the pipeline and the Dashboard always show what you are really offering.

The lines are a **draft quote** attached to the deal, with its number and status: “Quote COT-000001 · Draft”. The possible statuses are Draft, Sent, Viewed, Accepted, Rejected and Expired.

> **NOTE**
>
> If your workspace does not have the catalog module, the tab says “The catalog module is not enabled in this workspace.”. In that case, type the amount by hand in Estimated value.

> **TIP**
>
> Set up your catalog properly (name, price and unit) before you start quoting: each quote uses the product's price at that moment.

14

CHAPTER 14

Deal history

The sale's memory.

History tells everything that happened to this deal, newest first, with the date and time of each thing. It is the sale's memory, useful when someone takes it over halfway.



History: everything that happened to this deal, newest first.

Event	When it appears
Deal created	When it is born, from anywhere.
Stage: A → B	Each stage change, from where to where.
Note: ...	Notes you left when closing it, or that the AI left when moving it forward.
Deal updated	Changes to the amount, date, priority, owner...
✓ Marked as won / ✕ Marked as lost	When it is closed.
↺ Reopened	When it is reopened.
Steps and activities	The next steps and activities that were created.

The history only loads when you open the tab. If the deal is new and has nothing, it says “No activity yet.”. Chat messages do not appear here one by one: that is what the conversation is for, and the contact profile has the full story (chapter 31).

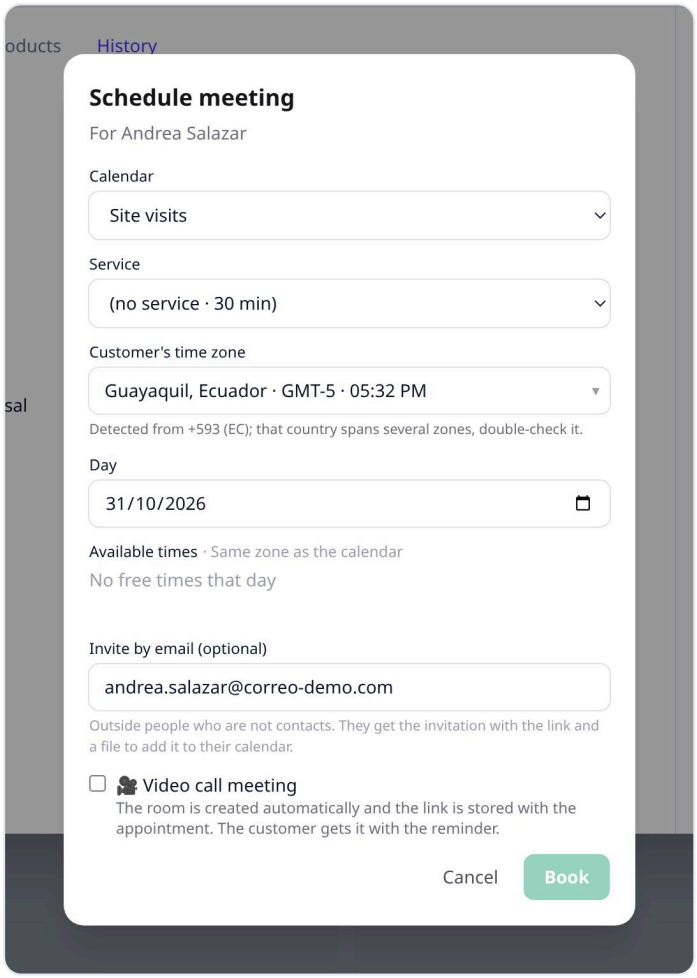
15

CHAPTER 15

Scheduling a meeting from the record

An appointment in the Calendar, without leaving the sale.

📅 **Schedule meeting**, in the record header, opens the **Omnifox Calendar** booking dialog with the customer already filled in (“For Andrea Salazar”).



Schedule meeting: the Calendar booking dialog with the customer already filled in.

1. Pick the **Calendar**; at Sol Andino, **Site visits**.
2. If that calendar has services, pick the **Service** (it sets the duration).
3. Check the **customer's time zone**: Omnifox works it out from the phone number (+593 → Ecuador).
4. Pick the **Day** and one of the **available times**. Only free ones show; if there are none, it says so.
5. If you like, **invite by email** (they get the invitation with the link and a file for their calendar) and turn on a **video call meeting** (the room is created automatically and the link is saved in the appointment).
6. Click **Schedule**.

The appointment goes into the Calendar with its reminders to the customer, and you also see it in the customer's history, on their profile (chapter 31). For the Calendar details —services, hours, reminders— see the Calendar guide.

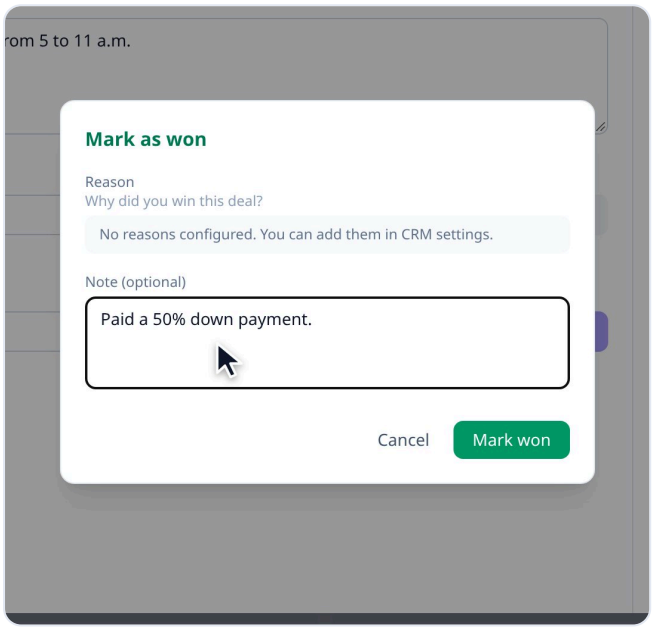
TIP

Use Schedule meeting when the customer needs to know about the appointment (a site visit, a demo). For a reminder just for you, a Meeting activity is enough (chapter 11).

CHAPTER 16

16 Marking a deal as won

When the customer says yes.



Mark as won: reason and note, both optional.

Click ✓ **Mark won** in the record header. **Mark as won** opens:

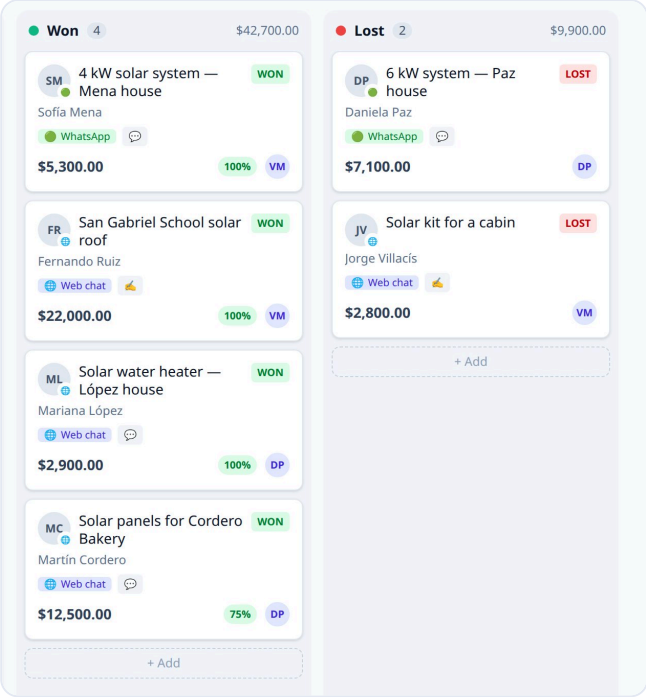
Field	What it is
Reason	"Why did you win this deal?". Pick one of your win reasons or "No reason". Optional.
Note (optional)	Context: "Paid a 50 % down payment".

Click **Mark won**.

If you haven't set up win reasons yet, the dialog says "No reasons configured. You can add them in CRM settings." (chapter 28). You can still mark it won.

What happens when you win it

- It moves to the stage flagged as **Won**, with today's close date.
- It counts on the Dashboard: in **Won this month**, the **monthly goal**, the **win rate** and **By seller**.
- It stops showing the next step and the overdue warnings.
- It is recorded in the History and in the customer's history.
- It triggers the "A deal is marked won" automations, for example the recipe that adds the Customer tag (chapter 21).



The won deal moves to the Won column.

Reopen

If you made a mistake, open the record and click ↺ **Reopen** ("Reopen the deal in the stage it was in"): it goes back to the stage it was in before closing (or to the first open stage) and no longer counts as won.

> **TIP**
>
> Dragging the card to the Won column also wins it, but with no reason or note. If you want to know why you win, use the button.

> **WATCH OUT**
>
> If the pipeline has no stage flagged as Won, Omnifox cannot close the deal and tells you the pipeline has no won/lost stage to close into. Flag one in Settings (chapter 26).

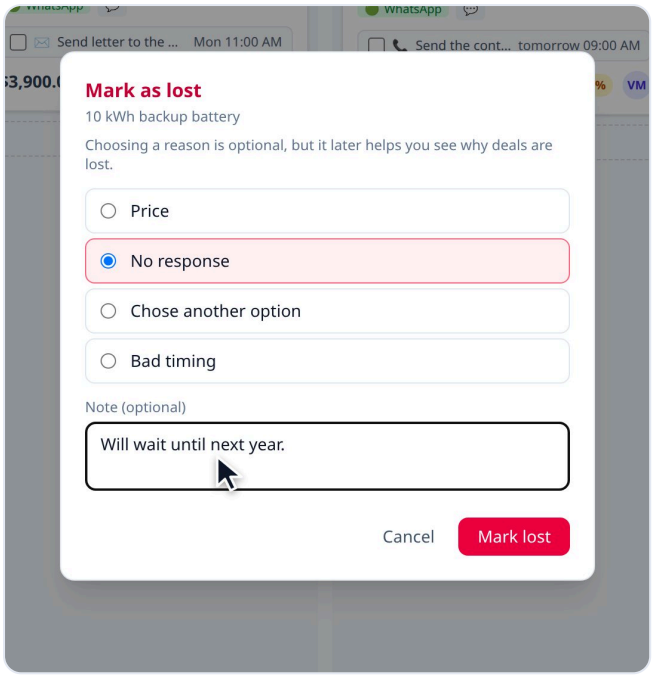
17

CHAPTER 17

Losing a deal and its reason

Losing is information too.

When a sale doesn't happen, drag it to the **Lost** column or click ✕ **Mark lost** on the record. **Mark as lost** opens:



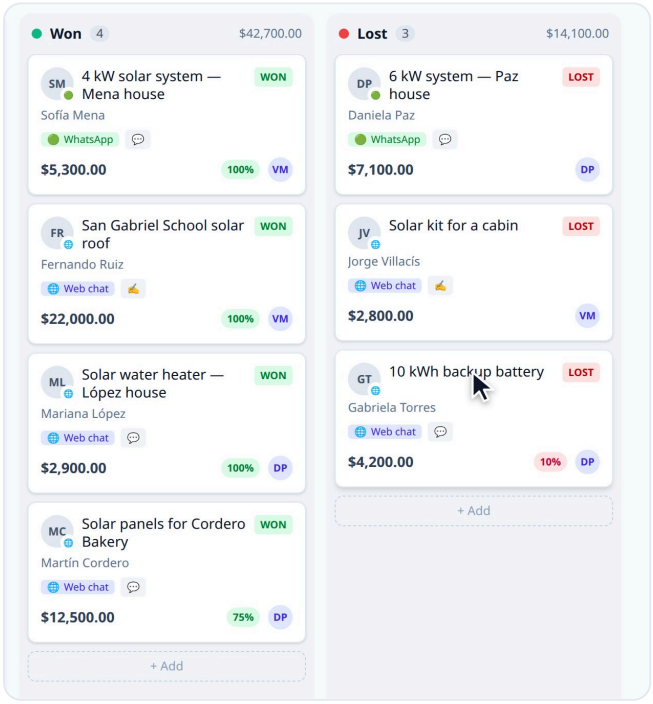
Mark as lost: the reason is optional; tapping the selected one clears it.

Part	What it is
Reasons	Your loss reasons as options: **Price**, **No reply**, **Chose another option**, **Bad timing** or the ones you define. Tapping the selected one clears it.
Note (optional)	Context: “Will wait until next year”.
Mark lost	Confirms. Also with no reason.

As the dialog says, “Choosing a reason is optional, but it later helps you see why deals are lost.”. It is gold: the Dashboard groups your losses from the last 90 days by reason in **Why we lose** (chapter 25), and within a month you know whether you lose on price, because customers stop answering or because you arrive late.

Where this dialog appears

When you drop a card on Lost, pick Lost in the stage bar, click ✕ Mark lost, create a deal directly in Lost, close several in bulk (a single reason for all: “Mark N deals as lost”) and from the chat pill. If you cancel, nothing changes.



Lost deals stay in the Lost column, with their red label.

After losing it

The card **stays in the Lost column**, with its red label, and counts in the win rate. If it was already lost and you mark it again, it keeps its reason and adds the new note.

If the customer comes back, open the record and click ↺ **Reopen**: the deal goes back to the stage it was in.

If you have no active reasons, the dialog says so and offers a link to **Settings**.

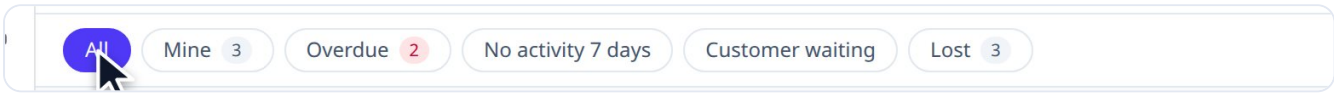
> **TIP**
> Give your reasons names that lead to an action. “Price” tells you to review your offer; “No reply”, to work on follow-up; “Chose another option”, to look at your competitors.

CHAPTER 18

18 Quick filters and search

Find what is urgent in one click.

Above the pipeline are the **quick filters**, each with its counter. The alert ones —Overdue and Customer waiting — turn red when they have something.



The quick filters, each with its counter: All, Mine, Overdue, No activity 7 days, Customer waiting and Lost.

Filter	Shows	What for
All	The whole pipeline.	The normal view.
Mine	The ones you own.	Your work, without everyone else's.
Overdue	Open deals whose next step has passed, or whose expected close date has passed.	What is slipping away.
No activity 7 days	Open deals nobody touched in a week: no activity, no stage change, not newly created.	Forgotten sales.
Customer waiting	Open deals with a customer message waiting for a reply.	The most urgent: someone wrote to you and nobody answered.
Lost	The ones closed as lost.	Reviewing them and, if they come back, reopening them.

Filters combine with the search box and also apply to the List view and the CSV export.

Search

Search deals... filters instantly, as you type, by the deal **title**, the **contact name** or the **company**. Clear it to see everything again.

> **TIP**
> A five-minute routine: every morning, **Customer waiting** (reply), then **Overdue** (do or reschedule), and once a week **No activity 7 days** (give it a next step or mark it lost).

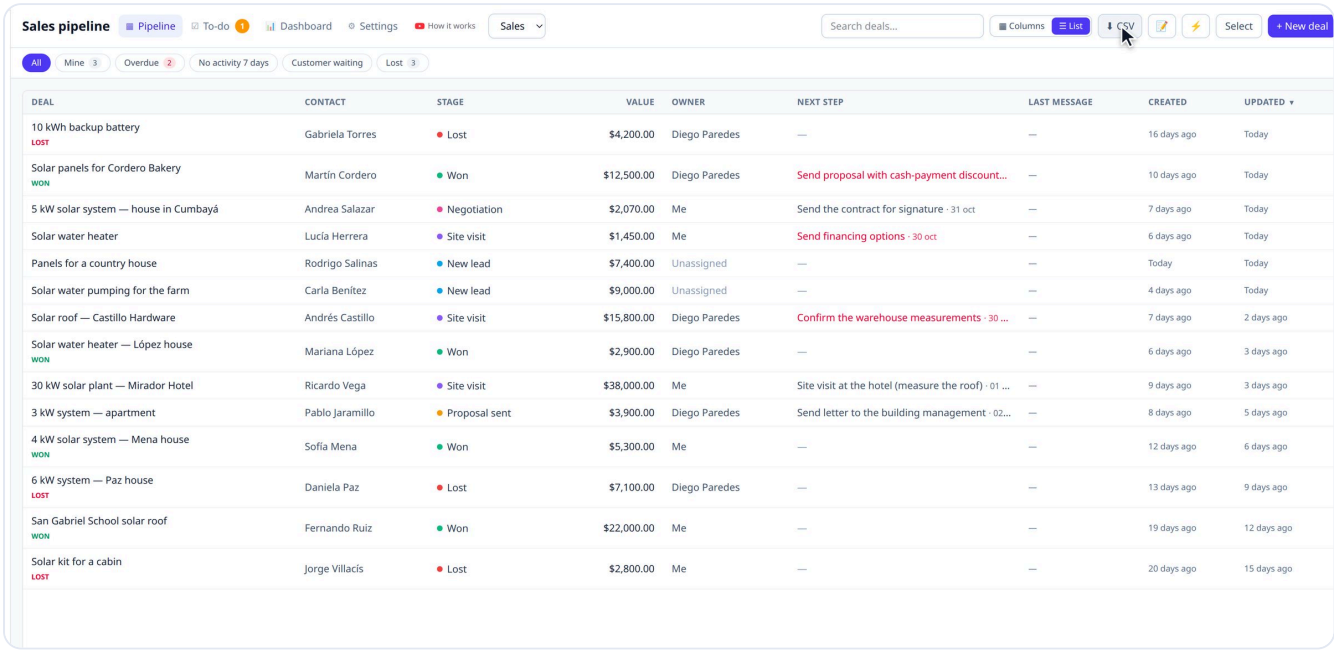
19

CHAPTER 19

List view and export to Excel

The same sales, in a table.

If you prefer a table, switch from **Columns** to **List**. You see the same deals, with the same filters and the same search, in rows.



List view: the same deals in a sortable table, with the export to CSV button.

Column	What it shows
Deal	The title, with Won or Lost if it is closed.
Contact and **Stage**	The customer and the stage, with its color.
Value	The amount.
Owner	"Me" if it is you, someone else's name or "Unassigned".
Next step	The step and its date, or "⚠ No next step..." if there is none; red if overdue.
Last message	The last thing the customer wrote.
Created and **Updated**	Today, Yesterday or "N days ago".

Click a column header to **sort** by that column; click again to reverse the order. Click a row to open the record. On a phone, instead of headers there is a **Sort by** selector.

Export to Excel

In List view the download button ⬇ appears ("Export the current list to CSV"). It downloads exactly what you are looking at —with the quick filter and the search— to a CSV file that opens in Excel or Google Sheets, with these columns: Title, Contact, Stage, Status (Open, Won or Lost), Value, Currency, Owner, Next step, Due, Last message, Created and Updated.

> **NOTE**
>
> The file uses a semicolon (;) as separator, which is what Excel expects in many regional settings. If everything lands in one column, use Data → Text to Columns in Excel or Data → Split text to columns in Google Sheets.

Omnifox **remembers the view** you chose (Columns or List) in that browser.

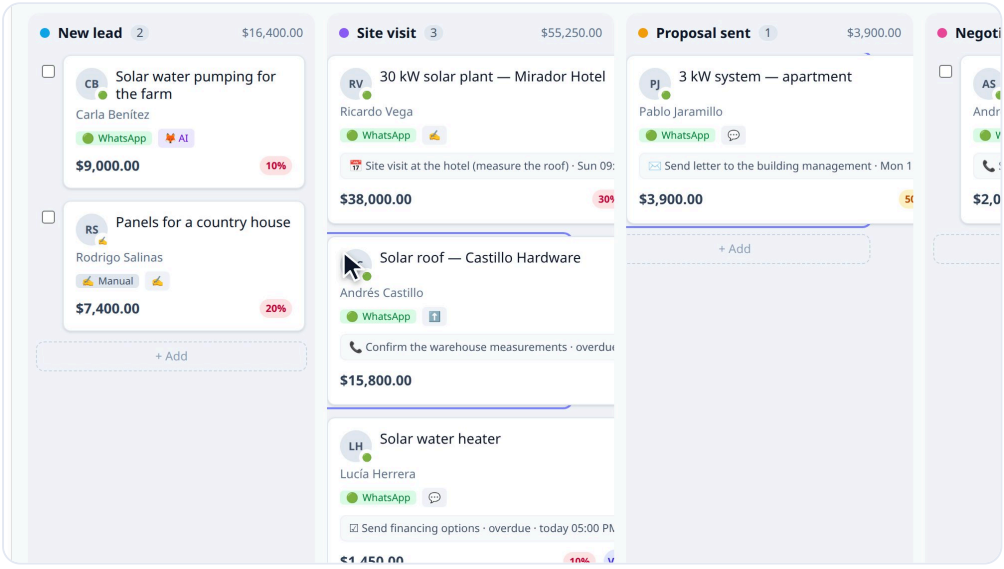
20

CHAPTER 20

Bulk actions

Several cards at once.

Click **Select** in the header: each card shows its checkbox and the button turns into **Cancel**. Tick several, or click **Select all** to take every card you are looking at with the current filters.



With Select, every card shows its checkbox.

As soon as one is ticked, the action bar appears at the bottom:



The bulk action bar: selected, Select all, Clear, Reassign, Move to stage, Close and Delete.

Action	What it does
"N selected"	How many you have ticked. **Clear** unticks them.
Reassign	Changes the owner of all of them: pick a person or **Unassign**.
Move to stage	Moves them to another stage of the pipeline. If it is Lost, it asks for the reason once for all of them.
Close	✅ **Mark won** or ❌ **Mark lost** (with optional reason).
Delete	Asks you to confirm: "This will delete N deal(s). This cannot be undone.". Admins only.

Each deal goes through **the same rules** as if you did it by hand, one by one: it is recorded in its history, your teammates see it live and your automations fire. If one fails (for example, because someone else deleted it), the rest are still processed.

> **TIP**
> Perfect for when a seller goes on vacation: filter by their name in the List or use the search, Select all, Reassign.

> **NOTE**
> Bulk actions are desktop work: Select does not appear on a phone.

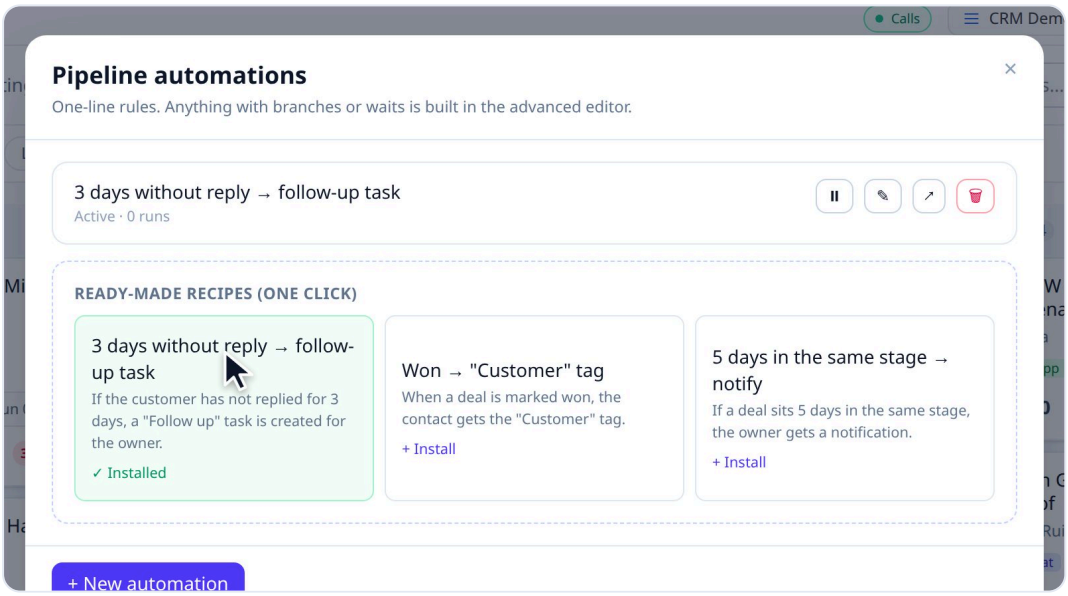
21

CHAPTER 21

Pipeline automations

One-line rules: when this happens, do that.

The lightning button ⚡ in the header opens **Pipeline automations**: “One-line rules. Anything with branches or waits is built in the advanced editor.”. Each rule applies to the pipeline you are looking at.



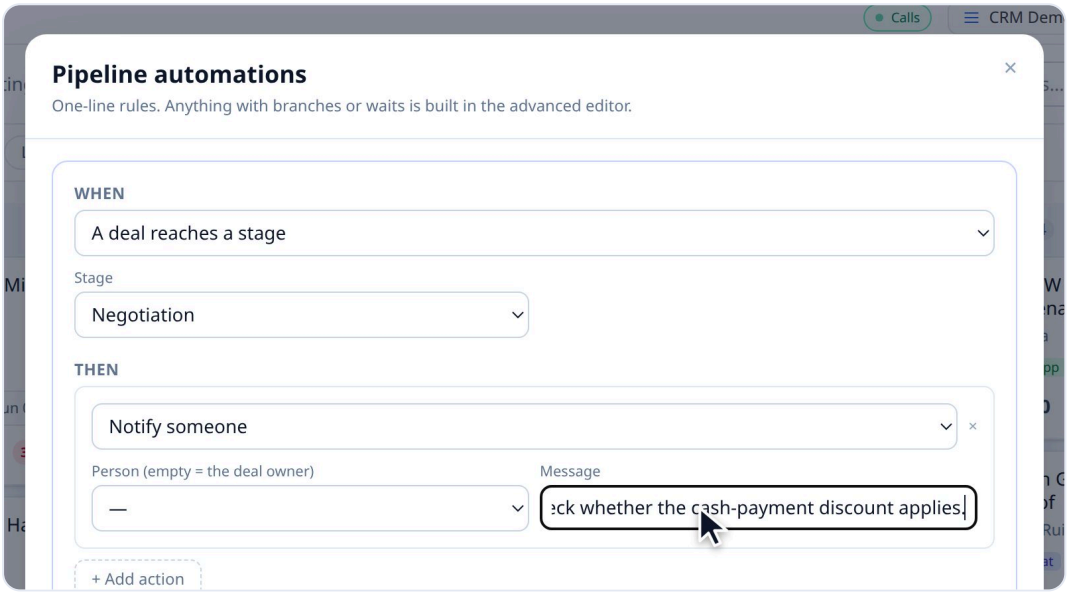
Pipeline automations: the one-click ready-made recipes and New automation.

Ready-made recipes (one click)

To get started quickly there are three recipes. Click **Install** and it is up and running (the button changes to **Installed**):

Recipe	What it does
3 days without reply → follow-up task	If the customer has not replied for 3 days, a “Follow up” task is created for the owner.
Won → “Customer” tag	When a deal is marked won, the contact gets the Customer tag.
5 days in the same stage → notify	If a deal sits 5 days in the same stage, the owner gets the alert “Stuck deal: 5 days in the same stage”.

Build your own



A new rule: When a deal reaches Negotiation, Then...

1. Click **+ New automation**.
2. Under **When**, pick the trigger and fill in its fields (table below).
3. Under **Then**, click **+ Add action** and pick what to do. You can add several actions; they run in order.
4. Click **Save automation**. If you didn't add any action, it warns “Add at least one action.”.

When…	Fields
A deal reaches a stage	Stage.
A deal is created	—
A deal is marked won	—
A deal is marked lost	—
Priority changes	Priority (optional: to which one).
It sits N days in the stage	Days; Stage (optional: leave it empty for any).
It goes N days without activity	Days.
Customer has not replied for N days	Days.
An activity becomes overdue	Activity type (optional).

Then…	Fields
Move to another stage	Stage (from the same pipeline).
Change the priority	Priority.
Assign an owner	Person.
Create an activity	Type, Title, Due in (days), Owner (optional).
Add a tag	Tag (on the deal).
Tag the contact	Tag (on the person).
Notify someone	Person (empty = the deal owner) and Message.

Sol Andino example: *When a deal reaches **Negotiation**, then change the priority to **High** and create an activity "Call to close", due in 1 day.*

The list of rules

Each rule shows its name (built automatically: "Trigger → action, action"), whether it is **Active** or **Paused** (the switch), how many times it ran, and two buttons: **Open in the advanced editor** (in a new tab, to add waits, conditions or messages; chapter 42) and **Delete** ("Delete this automation?").

> **NOTE**
> If a rule was edited in the advanced editor, it is marked "Edited in the advanced editor: manage it there." and here it can only be paused, activated or deleted.

> **WATCH OUT**
> Time-based triggers (days in stage, no activity, customer silent, overdue activity) are not instant: Omnifox checks them every hour (and "no activity" once a day in the morning), and fires only once per deal per day.

> **NOTE**
> Creating, editing, pausing and deleting automations is for admins only. A seller sees the rules, but without the buttons to change them.

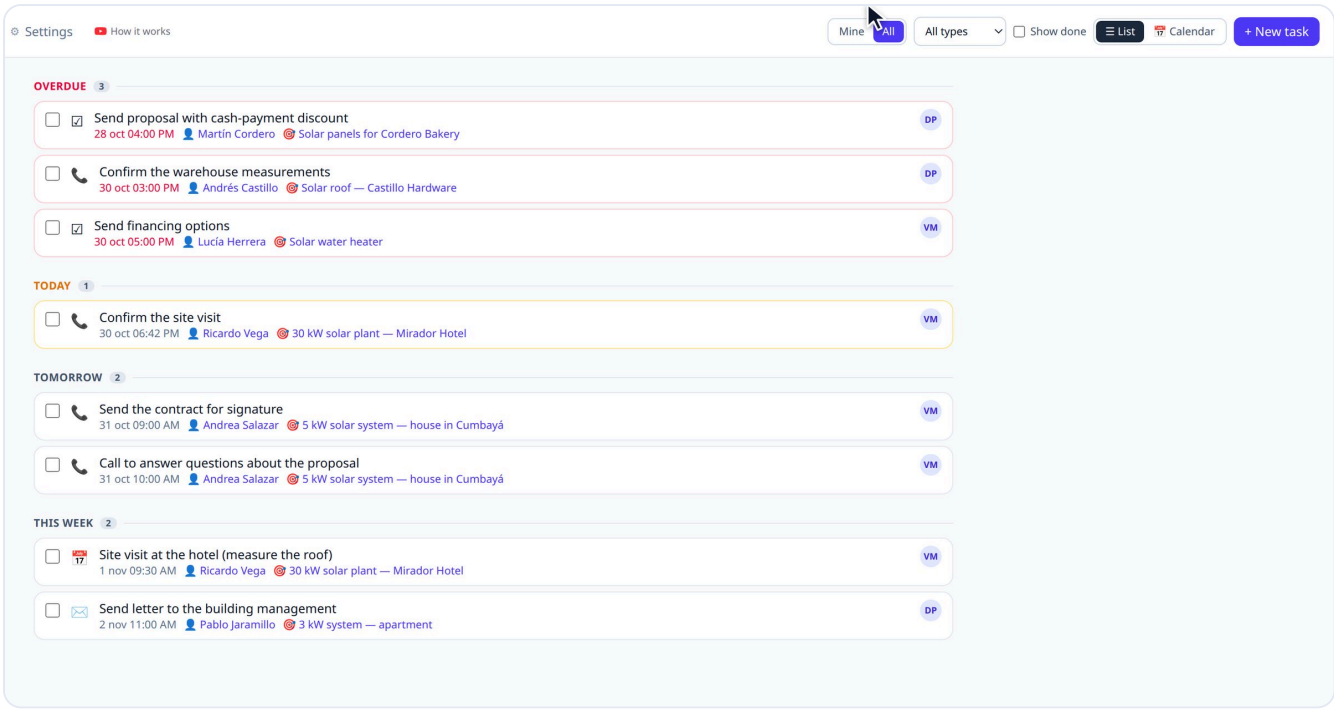
22

CHAPTER 22

To-do: your list for the day

Everything you need to do, on a single screen.

To-do gathers the **next steps and tasks** for your deals and contacts, sorted by when they are due. It is the screen to open every morning.



To-do: everything that needs doing, grouped by when it is due.

The groups

The list is grouped by date, calculated in your time zone: **Overdue** (in red), **Today**, **Tomorrow**, **This week**, **Later** and **No date**. If you show done ones, **Done** is added.

The header

Control	What it does
Mine / **All**	Only yours (the default) or the whole workspace team's.
All types	Filters by type: 📝 Note, 📞 Call, 🤝 Meeting, ✉ Email or ☑ Task.
Show done	Also shows the completed ones.
List / **Calendar**	Switches to the month view (chapter 23).
+ New task	Creates a to-do (chapter 23).

Each row

Each to-do shows its checkbox, the type icon, the title, the date and time, the **customer** (👤, one click opens their profile) and the **deal** (🎯, one click opens the Pipeline with its record), and the owner's initials.

Tick the box when you are done: it leaves the list (or moves to Done) and the submenu number goes down. If you made a mistake, show the done ones and click **Reopen**.

If you have nothing, it says “Nothing pending” and “Next steps you schedule on deals and contacts show up here.”.

TIP

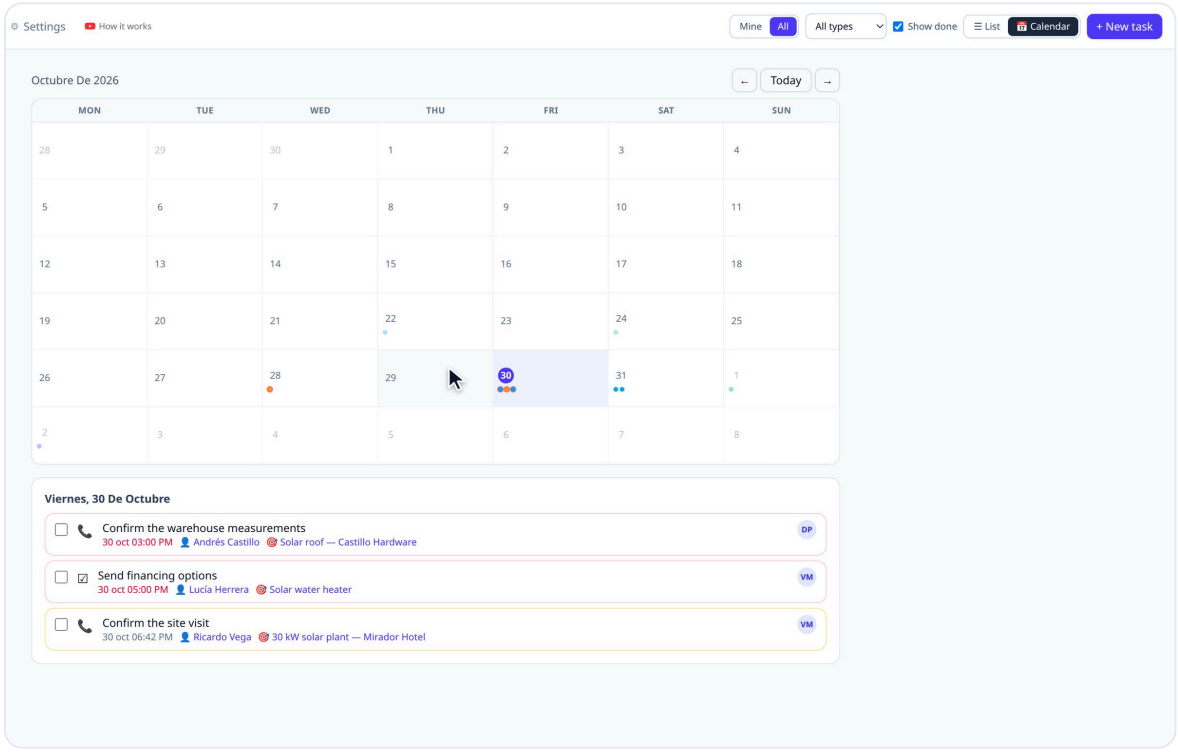
"All" shows the whole team's to-dos. It is useful for a supervisor who wants to see what is late overall, or to cover for a teammate.

CHAPTER 23

23 To-do calendar and new task

The month at a glance, and tasks that always have an owner.

The **Calendar** view shows the month with your to-dos on each day. Days with something **overdue** are marked in red. Tap a day to see its list below ("Friday, October 30"); if it has nothing, it says "Nothing scheduled for this day.". Navigate with ‹ and › and come back with **Today**.



Calendar view: the month with its to-dos and the list for the selected day.

New task

+ New task creates a to-do without going through the record:

Field	What you enter
For contact (required)	Search for the customer the task belongs to.
Type	Task, Call, Meeting, Email or Note.
What needs to happen?	The title.
Detail	Optional.
Date and time	When it is due. With a date, it is created with a reminder 60 minutes before.
Owner	**Me (owner)** or a teammate.

Every task **belongs to a customer**: if you try to save without picking one, it warns “Pick the contact this task belongs to.”. That way there is never a loose task nobody understands. The task goes on the contact's profile (chapter 31); for it to belong to a specific sale, create it from the deal record.

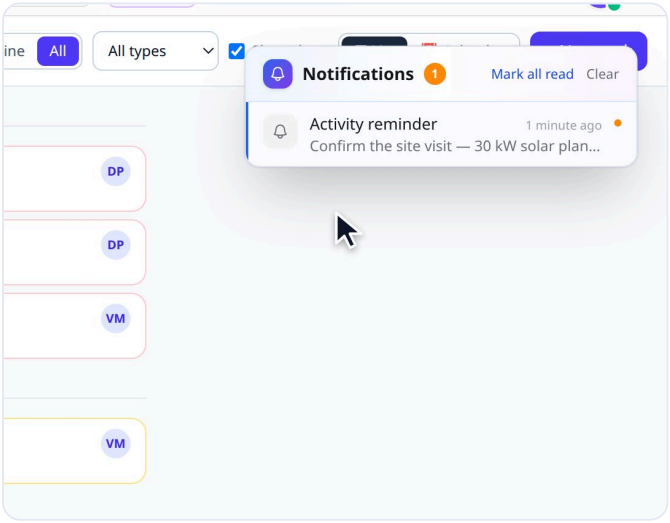
24

CHAPTER 24

Reminders and alerts

You don't have to remember to check: Omnifox reminds you.

Every to-do with a date and a reminder reaches you as a **notification** at reminder time: in the Omnifox bell and as an alert in the mobile app.



Alerts arrive in the notification bell (and in the mobile app).

Alert	When it arrives	To whom
Activity reminder	At the time you chose in the reminder (At the exact time, 15 minutes before, 1 day before...).	The activity owner.
Next step reminder	One hour before each next step that has no reminder of its own.	The owner.
Overdue step still pending	Once, when a step becomes overdue without being completed.	The owner.
Automation alerts	When a “Notify someone” rule fires (chapter 21).	The chosen person or the owner.

The alert says what needs doing, for which customer or sale and when, **in your language and your time zone** (your profile's or, if it has none, your organization's). Clicking the alert opens the deal —in the Pipeline, with its record— or the contact.

Turning them on or off

CRM alerts come turned on. You can turn them off or back on in your **notification preferences**, under the **Activity reminder** type.

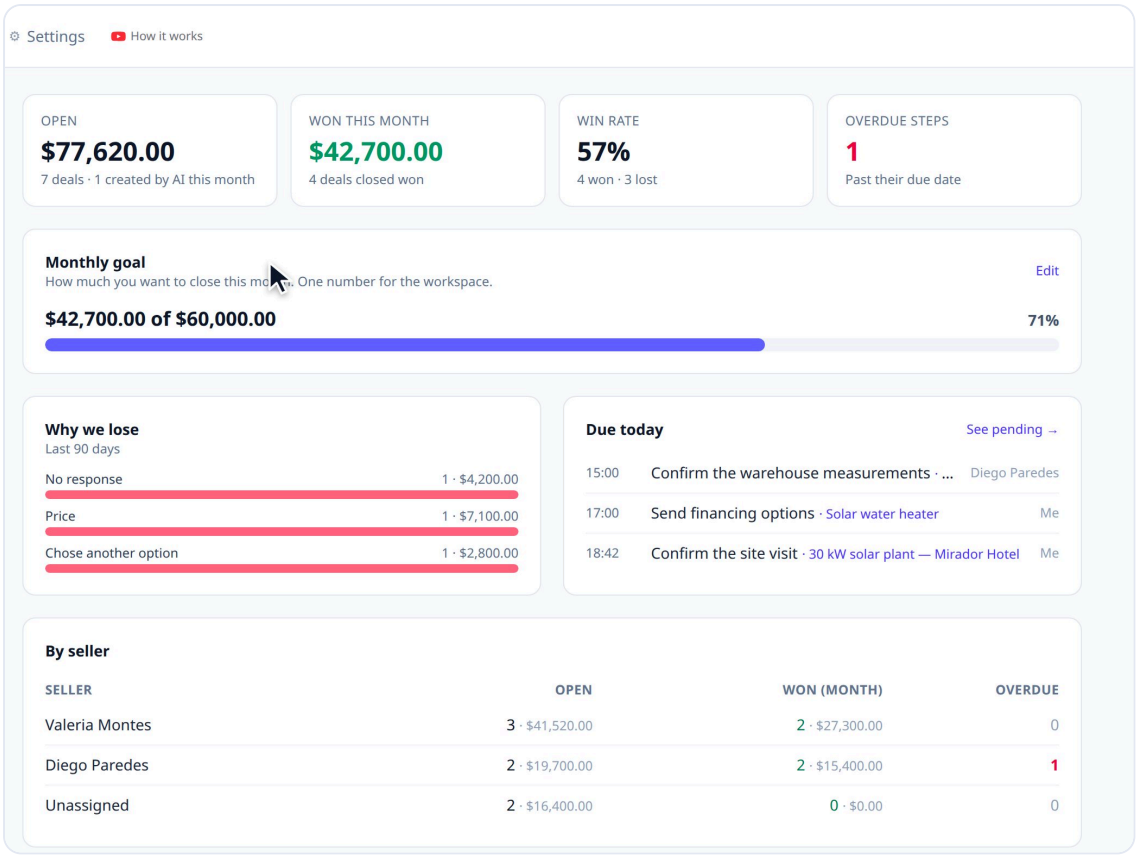
> **WATCH OUT**
> If they don't arrive, check three things: that the activity has a **date**, that it has a **reminder** (not “No reminder”) and that you are the **owner**. Then your notification preferences and your phone's notification permissions.

CHAPTER 25

25 The dashboard and the monthly goal

What an owner looks at on Monday.

The **Dashboard** shows on a single screen how the business is doing. It covers **the whole workspace**, all pipelines together, and is calculated on the spot: it is always up to date.



The Dashboard: the four numbers, the monthly goal, Why we lose, Due today and By seller.

The four numbers

Number	What it counts
Open	How much money is in open deals and how many there are. If your AI agent created any this month, it adds “N created by AI this month”.
Won this month	How much was won since the 1st of the month, and how many deals.
Win rate	Of the deals closed in the **last 90 days**, what percentage was won (“4 won · 3 lost”).
Overdue steps	How many open steps are past their due date. Red if there are any.

The monthly goal

A single figure for the whole workspace: “How much you want to close this month. One number for the workspace.”. Click **Set goal** (or **Edit**), type the amount and save. The bar shows how far along you are: “27,300 of 40,000”. With no goal it says “No goal yet. Without a goal there is no way to know whether the month is going well.”.

> **NOTE**
>
> Only an **admin** (or the account owner) can set or change the goal. Everyone else sees it.

The three blocks below

Block	What it shows
Why we lose	Deals lost in the last 90 days, grouped by reason, with bars, count and amount. Those lost without a reason appear as “No reason”.
Due today	Today's steps with their time, customer and owner (“Me” if it is you). **See pending** takes you to To-do. If there are none, “Nothing due today.”.
By seller	One row per person (and “Unassigned”): their **Open** deals (count and amount), their **Won (month)** and their **Overdue**.

> **NOTE**
>
> If you sell in several currencies, the Dashboard **never mixes them**: it shows one total per currency, for example “USD 1,200 + PEN 300”, in Open, in Won this month, for each seller and for each loss reason. The monthly goal is in the **Main currency** (chapter 26).

> **TIP**
>
> A ten-minute Monday meeting: how is the goal going?, which loss reason grew?, who has overdue steps? And from there, the Overdue and No activity 7 days filters in the Pipeline.

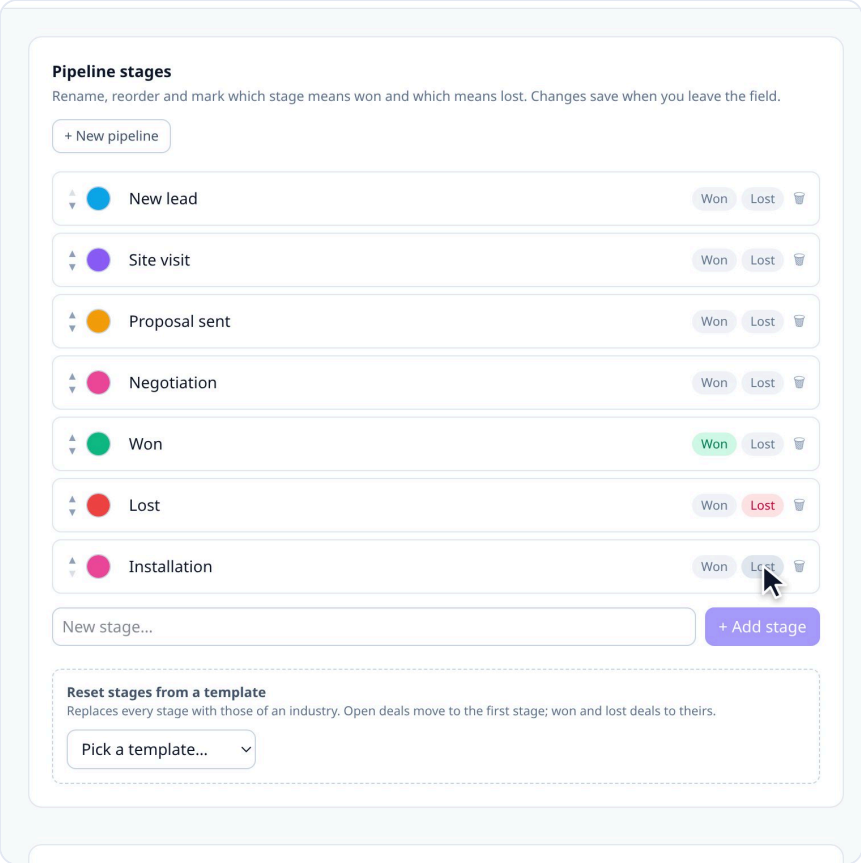
26

CHAPTER 26

Setting up pipeline stages

The stages that describe the way you sell.

In **Settings** you define your pipelines. At the top is the **Main currency** (at the end of this chapter); below it, the **Pipeline stages** section: “Rename, reorder and mark which stage means won and which means lost. Changes save when you leave the field.”.



Pipeline stages: color, name, order, Won and Lost flags, Add stage and Reset from a template.

Control	What it does
Pipeline selector	Picks which pipeline to set up (chapter 27).
Color (circle)	One click opens the stage's color picker. The color shows on columns, the list and the chat pill.
Name	Click, type and leave the field: it saves by itself.
▲ ▼	Moves the stage up or down one position.
Won / **Lost**	The flags that mark which stage closes the sale. That is how Omnifox knows what counts as won and lost on the Dashboard.
🗑	Deletes the stage. It asks you to confirm: “Delete? Its cards move to the neighbouring stage.” → **Yes, delete**.
+ Add stage	Type in “New stage...” and click Add stage: it is added at the end, with an automatic color.

WATCH OUT

You cannot delete a pipeline's only stage. And each pipeline should have **one** Won stage and **one** Lost stage: without them, sales cannot be closed.

How to name stages

Use stages that describe what **the customer does**, not what you do. That way moving a card is a clear decision.

Instead of…	Better…
“Call”	“Asked for a price”
“Prepare proposal”	“Site visit done”
“Follow-up”	“Proposal sent” / “Negotiation”

Between four and seven open stages is the most practical. Beyond that, the columns become hard to read.

> **NOTE**
> Setting up stages, pipelines and reasons is for admins only. A seller sees Settings in read-only mode, with a notice that only an admin can change the CRM settings.

Main currency

The first section of **CRM settings** is **Main currency**: “New deals start in this currency and the dashboard goal uses it. Amounts in other currencies are shown separately, never added together.”. Pick the currency from the list; it saves right away (“Saved”). It applies to the whole workspace.

If…	The main currency is…
Someone picked it	That currency.
Nobody picked it (the list says “Automatic (currently USD)”, with whatever code applies)	The **most used** currency among the workspace’s deals; if there are none yet, the **catalog** currency; and failing that, **USD**.

New deals that arrive without a currency (from the app, the AI or automations) start in the main currency, and the web **New deal** form starts in it too; you can change it on each deal. The Dashboard shows the goal in this currency and the other amounts separately by currency (chapter 25).

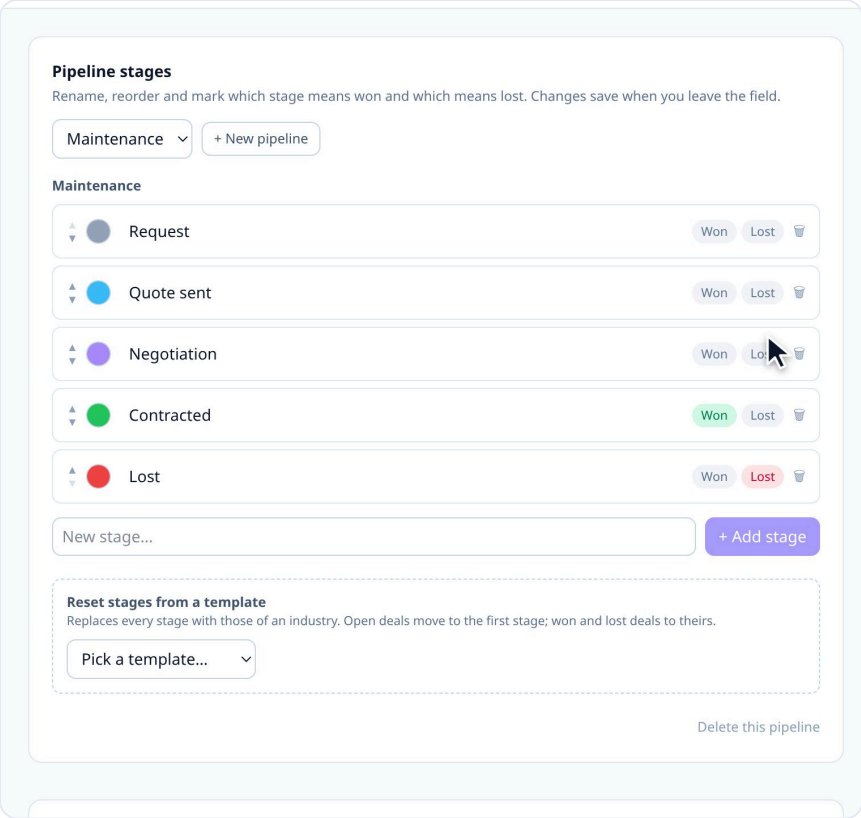
27

CHAPTER 27

Multiple pipelines and industry templates

One pipeline for each way of selling.

You can have several pipelines, for example one for **new sales** and another for **maintenance**. Each one has its own stages, cards and automations; the Dashboard adds them all up.



A second pipeline, Maintenance, with the pipeline selector and the chosen industry template.

New pipeline

1. In Settings, click **+ New pipeline**.
2. Type the **Name**: “Sales, Renewals, Appointments...”.
3. If you like, pick the **Industry (stage template)**: you will see a preview of the stages.
4. Click **Create**.

Industry	Stages it brings (won in bold)
Generic	Lead · Contacted · Proposal · **Won** · Lost
Clinic / practice	Inquiry · Appointment booked · Attended · **Treatment** · Lost
Real estate	Interested · Visit scheduled · Visit done · Reserved · **Closed** · Lost
Store / e-commerce	Interested · Quoted · Payment pending · Paid · **Delivered** · Lost
Services	Request · Quote sent · Negotiation · **Contracted** · Lost

TIP

In the store template, the won stage is “Delivered”: a paid sale only counts as won on the Dashboard once it is delivered. If you would rather count it when you get paid, flag “Paid” as Won.

Switching pipelines

In the Pipeline you pick which pipeline to see in the selector at the top. In Settings, the same selector picks which pipeline to set up.

Reset stages from a template

Replaces all of a pipeline's stages with an industry's: open deals move to the first stage; won and lost ones to theirs. Pick the template, click **Reset** and confirm with **Yes, reset**.

Deleting a pipeline

Delete this pipeline asks you to confirm (“Delete the pipeline … and its stages?”), as long as it **has no deals left**. If it still has some, Omnifox does not delete it: it tells you how many deals it still holds and asks you to move or delete them first.

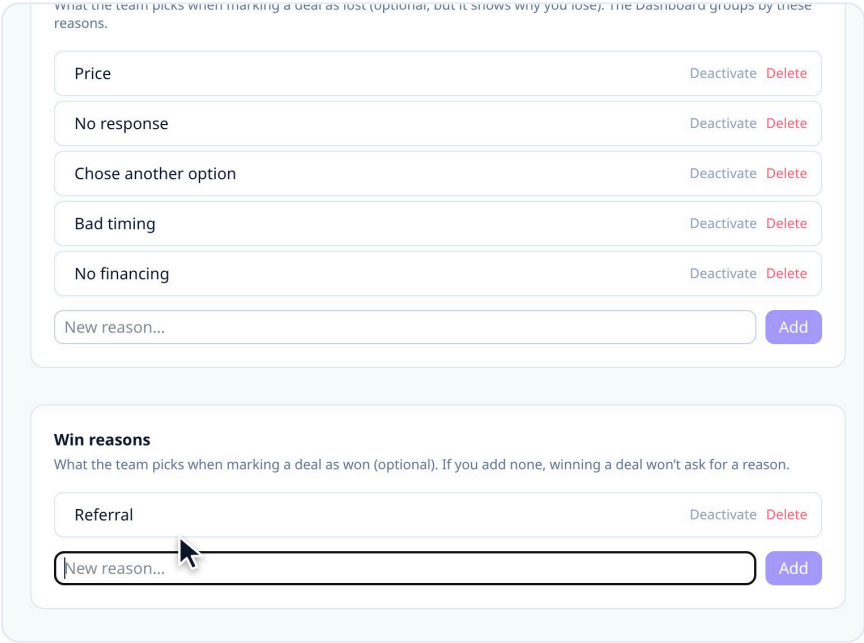
28

CHAPTER 28

Loss and win reasons

Why deals are lost and why they are won.

At the end of Settings are the reasons the team picks when closing a sale.



Loss reasons and Win reasons, at the end of Settings.

Loss reasons

What the team picks when marking a deal as lost (it is optional, but it shows why deals are lost); the Dashboard groups by these reasons. Four come preloaded: **Price**, **No reply**, **Chose another option** and **Bad timing**.

Action	How
Rename	Click the name, type and leave the field.
Deactivate / **Activate**	A deactivated reason stops appearing when losing, but deals that already use it keep it (and still count on the Dashboard).
Delete	Removes it from the list.
Add	Type in “New reason...” and click **Add**. For example, “No financing”.

Win reasons

They work the same way, but none come preloaded: what the team picks when marking a deal as won (optional). If you don't add any, no reason is asked when winning. Examples: **Referral**, **Better price**, **Fast installation**. They appear when you mark a sale as won (chapter 16).

> **TIP**
> Few, clear reasons: between four and six. With fifteen, nobody picks well and the “Why we lose” chart stops saying anything.

> **WATCH OUT**
> Prefer **Deactivate** over Delete for a reason that has already been used: that way you keep the record of why those sales were lost.

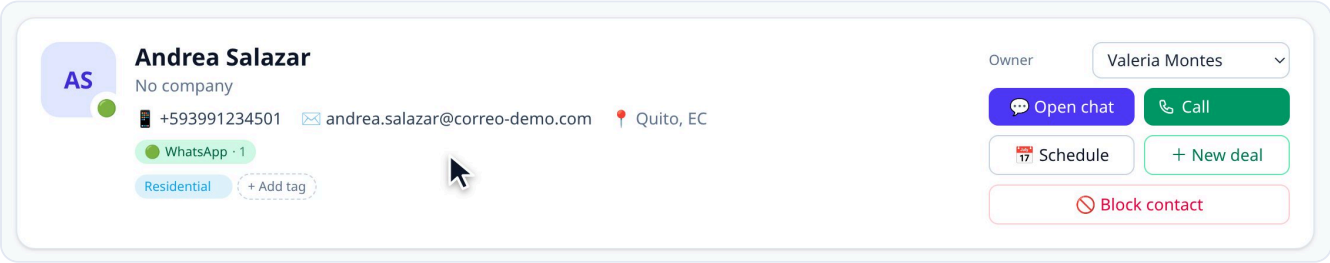
29

CHAPTER 29

The contact profile

Who this customer is and what history we have.

Every customer has their **profile**, with their whole history: all their deals, conversations, calls, appointments, campaigns and surveys. You get there from the deal (**View contact record**), from **Contacts** or from the chat (**View in CRM**).



The contact profile header: details, channels, tags, owner and buttons.

The header

At the top you see their photo with their channel dot, their name, their sentiment (Happy, Satisfied, Neutral, Frustrated or Angry, depending on how they have been talking), their company and job title (or “No company”), phone and email, the channels they wrote to you on, their **tags** (with + to add and × to remove)

and their **Owner**: the person on the team who looks after them, or “Unassigned”.

The buttons

Button	What it does
Open chat	Goes to their latest conversation in the inbox. If they never wrote, it is disabled: “No conversations with this contact yet”.
Call	Opens the phone (on a phone, it dials; on a computer, your calling app) and the **Log call** dialog (below). With no phone number, it is disabled.
Schedule	Creates an appointment in the Calendar with this customer.
+ New deal	Opens the new deal form with this customer already picked (you only choose the pipeline and the rest).
Block contact	For someone who shouldn't write to you anymore (below).

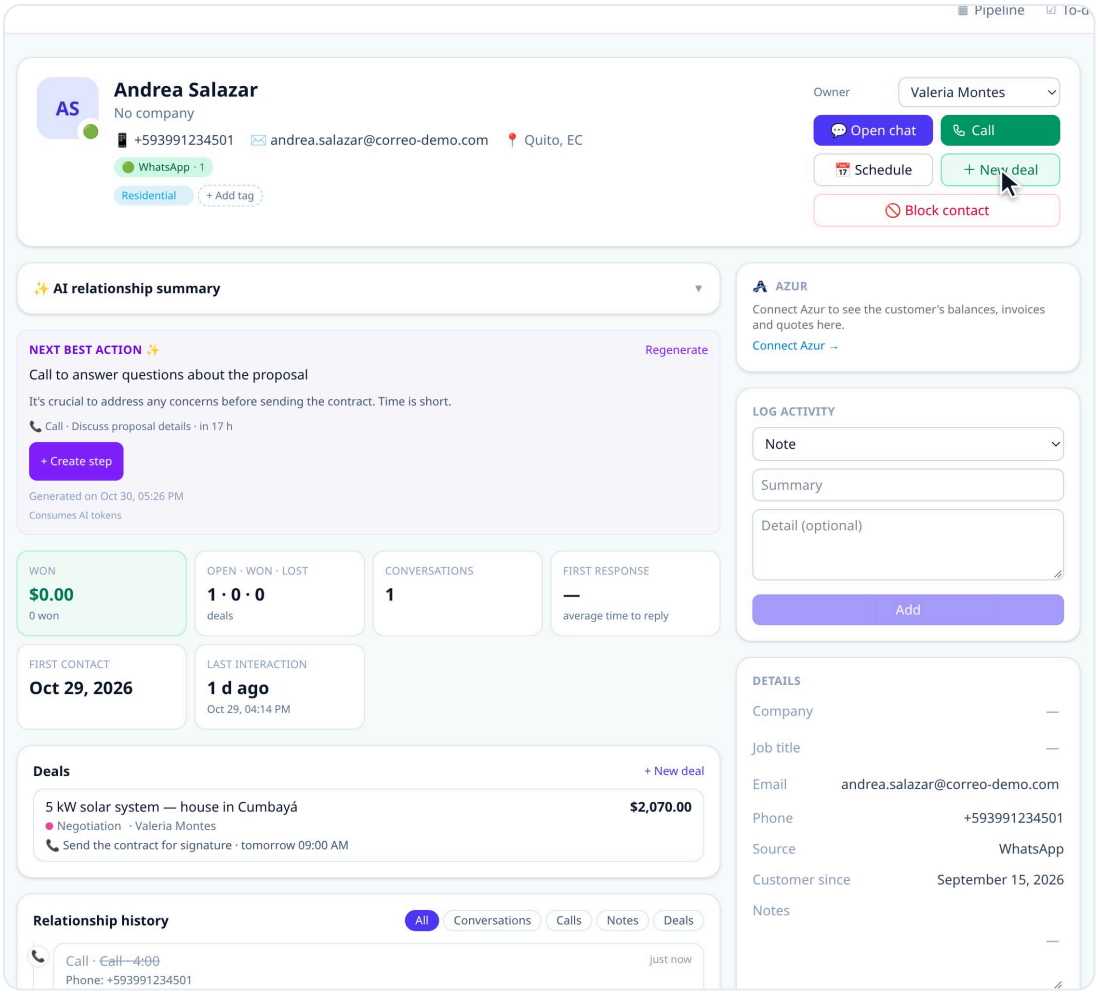
Log call

Field	Options
Result	**Answered**, **No answer** or **Voicemail**.
Duration	Minutes and seconds, or **Use timer**: it counts while you talk (“Call in progress · 03:12”).
Notes	“What was discussed (optional)”.

Save call logs it as a call activity (“Call · 4 min” or “Call · No answer”), which shows up in the customer's history.

Block

Block contact asks for a reason. A blocked contact stops reaching the inbox: their messages don't open conversations or wake up the AI. The profile shows a red block with who blocked them, when and why, and the **Unblock** button. If it was the AI that dismissed them as not a customer (spam, suppliers...), an amber block “Dismissed by AI” appears.



The full contact profile: AI summary, numbers, deals, history and, on the right, Log activity and Details.

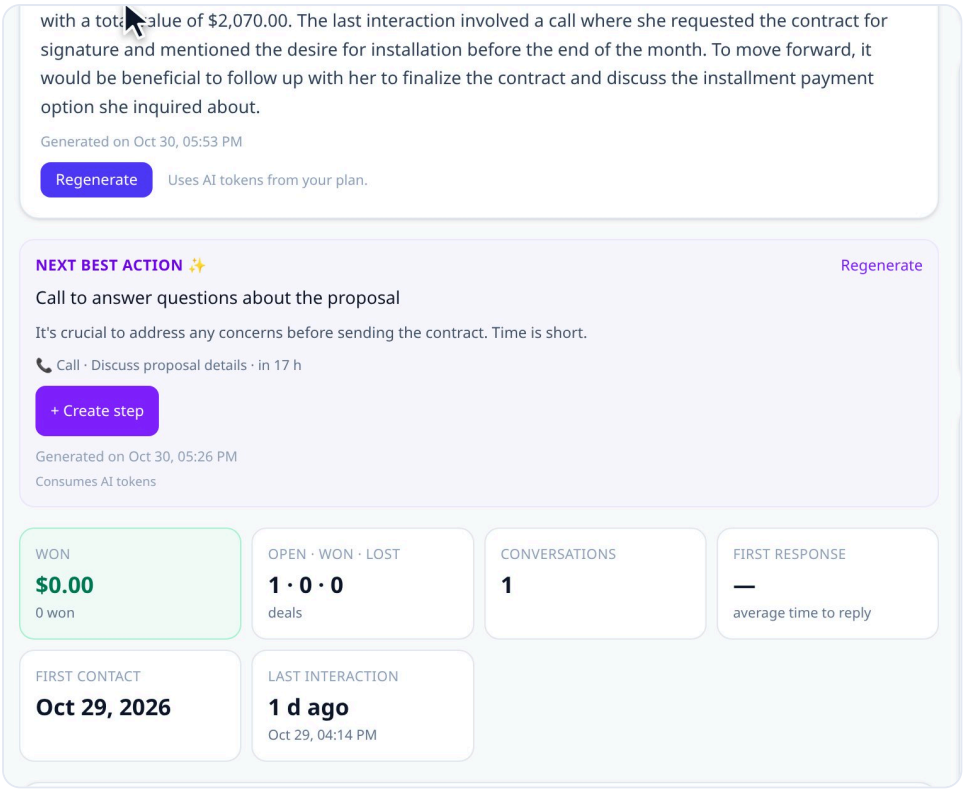
CHAPTER 30

30 AI summary and customer numbers

A paragraph to catch up, and the relationship's numbers.

AI relationship summary ✨

The collapsible **AI relationship summary** block reads everything that happened with this customer — conversations, calls, notes, deals— and tells it to you in a paragraph: who they are, what they want and where things stand. Ideal before calling them or when you inherit a customer.

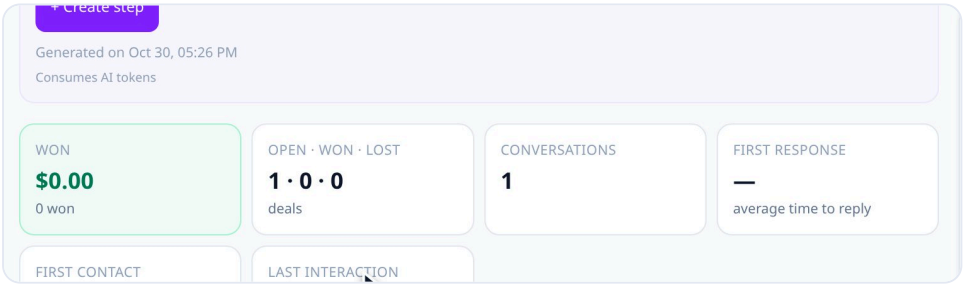


The AI relationship summary already generated, with Regenerate.

With no summary it says “No summary yet. Generate one to read at a glance who this customer is and where things stand.”. Click **Generate summary**; it is saved with its date (“Generated on …”) and anyone on the team can read it at no cost. **Regenerate** rebuilds it with the latest. Each generation uses AI tokens from your plan.

Below it is also the **Next best action** ✨ (chapter 10), for the customer's most recent open deal.

The customer's numbers



The customer's numbers: won, deals, conversations, first response, first contact and last interaction.

Number	What it counts
Won	How much they bought from you (won deals) and how many.
Open · Won · Lost	How many deals they have in each status.
Conversations	How many conversations they had, and how many calls (answered and missed).
Talk time	The sum of their calls.
First response	The average time it takes to reply to them.
First contact and **Last interaction**	Since when you have known them and when the latest thing was (“16 h ago”).
Last purchase	Their latest order or quote, if you use the catalog.

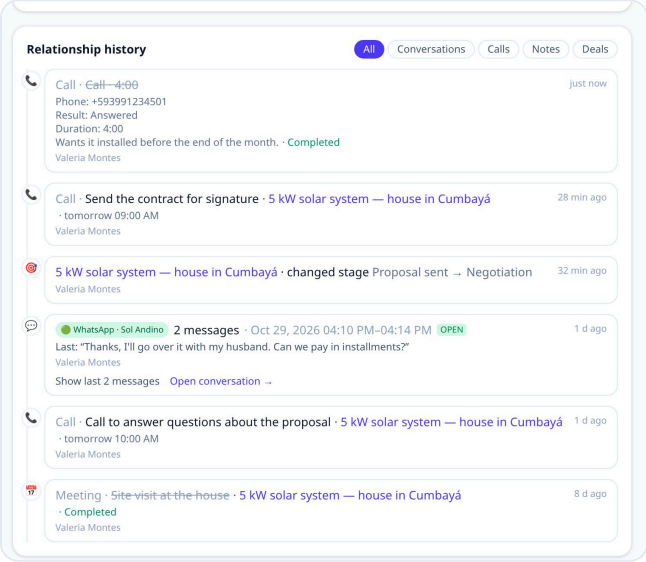
> **NOTE**
>
> If your plan doesn’t include CRM AI, or the month’s allowance is used up with no balance, **Generate summary** and **Regenerate** are disabled, with the reason below and the **See plans and balance** link. The same goes for the Next best action.

31

CHAPTER 31

Deals and relationship history

Their sales and everything that happened, in order.



The contact's deals and the Relationship history, with its filters.

Deals

Lists their **open** sales, with the stage, owner, amount and next step (or “⚠ No next step...”). Below, collapsed, the **History** with the closed ones. Click any of them to go to its record in the pipeline. **+ New deal** opens the form for this customer.

Relationship history

Every event, newest first. Filter it with **All**, **Conversations**, **Calls**, **Notes** or **Deals**; at the bottom, **Load more**.

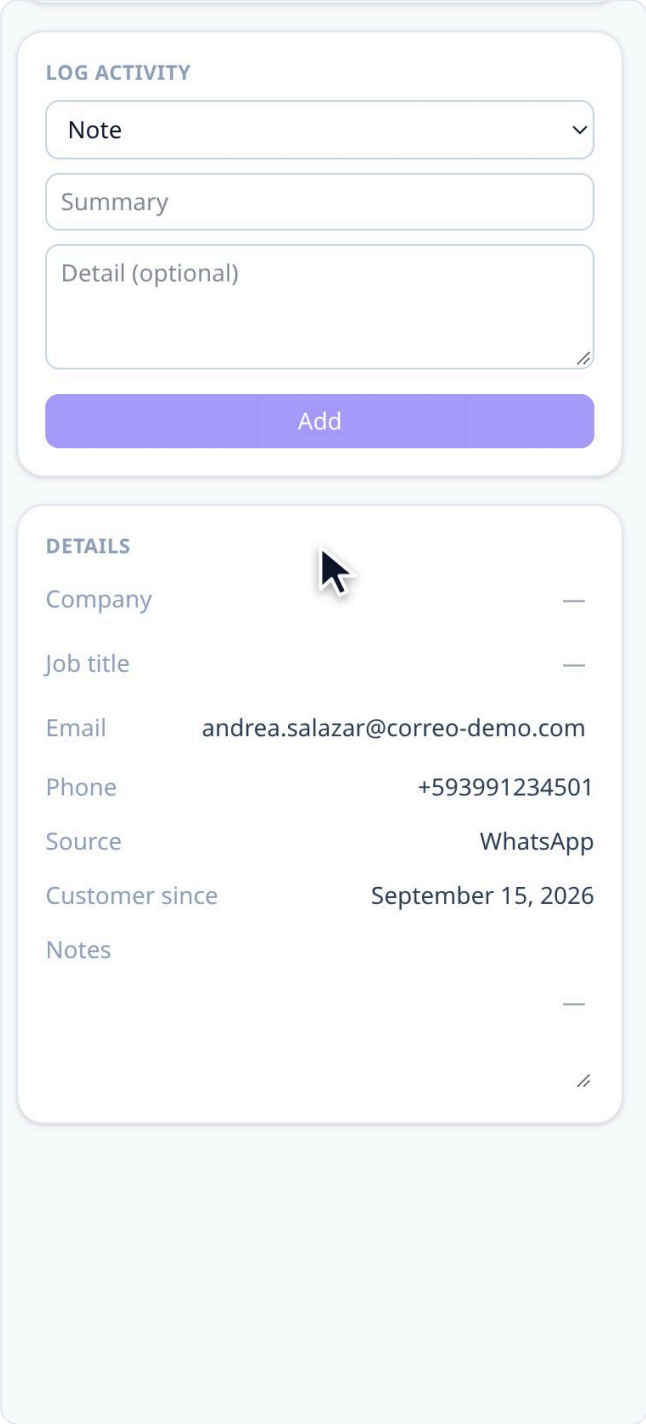
Event	What it shows
Conversation	**One card per conversation**, not message by message: the channel, how many messages, the dates, the status (open, pending, snoozed, resolved or closed) and the last message. “Show last N messages” expands them (Customer, Us, AI agent); **Open conversation** goes to the chat.
Call	Inbound, outbound or missed, with its result, duration and notes.
Note or activity	Notes, tasks and steps, of this contact or of their deals.
Appointment	Appointments booked in the Calendar.
Deal	When it was created, changed stage, was won, lost, reopened or deleted.
Campaign	“Received campaign …” and whether they replied.
Survey	“Rated the service”, with the score.

The right-hand column

Log activity adds a note, a call or a task to this customer: type, **Summary**, **Detail (optional)** and, for tasks, the due date. Click **Add**.

Under **Details** you edit their **Company**, **Job title**, **Email** and **Notes** (they save when you leave the field). You also see their **Phone**, their **Source** (the channel they came from, for example WhatsApp) and **Customer since**. Below, their contact **Custom fields**.

If your workspace has the Azur integration turned on, the Azur panel also appears at the top with their balances, invoices and pro forma invoices.



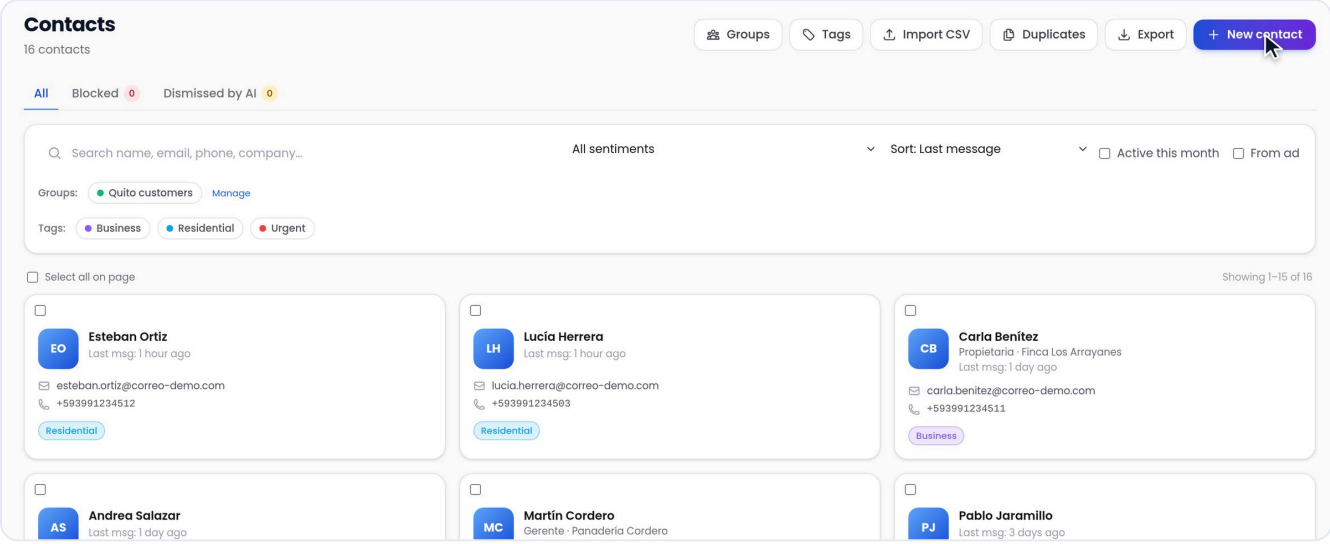
Log activity and Details, in the right-hand column.

CHAPTER 32

32 The contact list

The database of all your customers.

Contacts, in the left-hand menu, is the list of all the people and companies in your workspace: those who wrote to you on any channel, those you imported, those who came through a form and those you added by hand.



Contacts: tools at the top, tabs, search, filters and a card for each contact.

The tools at the top

Button	What it opens	Chapter
Groups	Your contact lists.	34
Tags	All the workspace's tags, with how much each one is used.	34
Import CSV	Import contacts from Excel, LibreOffice or CSV (and create deals).	36
Duplicates	Contacts that look like the same person.	38
Export	Download contacts as CSV.	37
New contact	The full contact form.	33

Search and filter

Filter	What it does
Search box	**Search name, email, phone, company...**
Sentiment	All sentiments, Happy, Satisfied, Neutral, Frustrated or Angry: how the customer has been talking, according to the AI.
Sort	Last message (default), Name or Recently added.
Active this month	Only those with activity this month.
From ad	Those who came through a Click to WhatsApp ad (their conversation carries the Meta ad referral).
Groups chips	One click filters by that group (if you pick several, contacts in any of them). **Manage** opens the groups.
Tags chips	One click filters by that tag; with many, use its search box.
Clear filters	Shows everything again.

Filters are kept in the page address: you can save or share the link to a filtered list.

The tabs

All, **Blocked** (those you blocked, chapter 29) and **Dismissed by AI** (those the AI marked as not customers: spam, suppliers, wrong numbers), each with its counter. In the last two, anyone with permission can **Unblock**.

Each contact

Each card shows the checkbox, photo or initials, the name (or "(unnamed)"), company and job title, "Last msg: ... ago", email, phone and their tags. The actions **View** (opens their profile), **Edit** and **Delete**. At the bottom, "Showing 1–15 of 15" and the pagination.

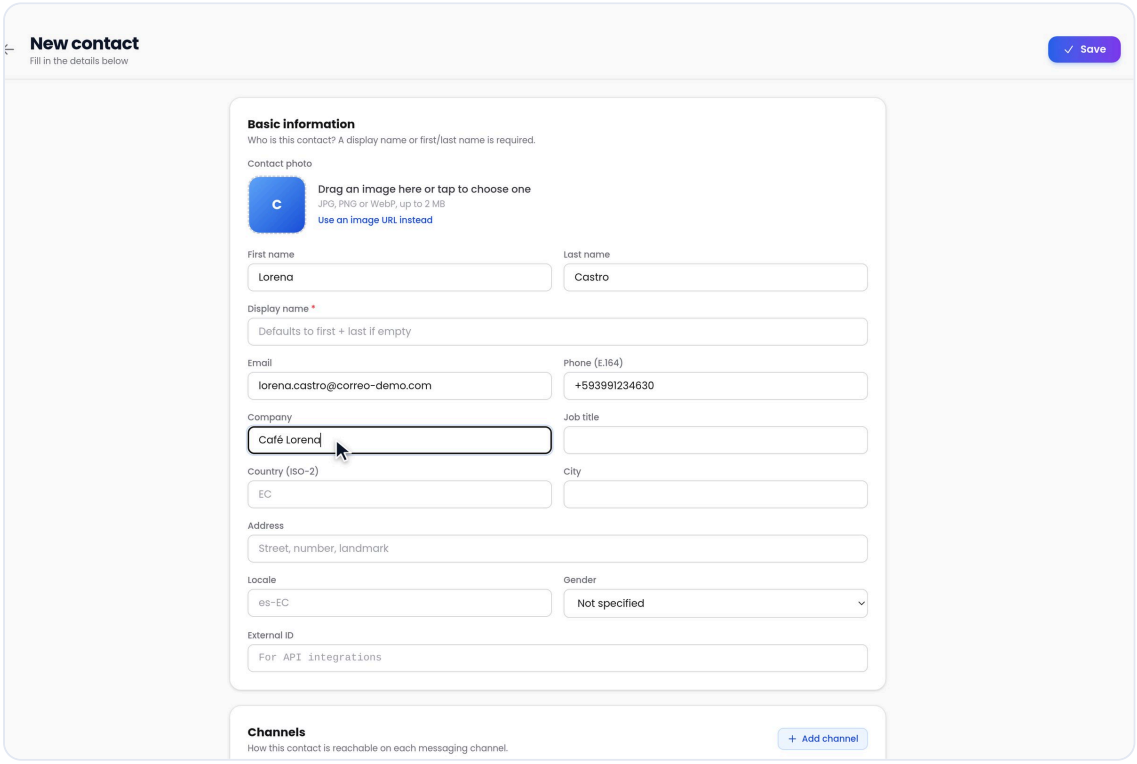
> **NOTE**
>
> Deleting a contact does not delete their conversations, and if you made a mistake, support can recover it. Importing, exporting, editing and deleting contacts require the manage contacts permission (the Agent role has it by default).

CHAPTER 33

33 Creating and editing a contact

The full record of a person or company.

New contact opens the full form. (To create a contact quickly while you load a sale, use "Create and link" in New deal, chapter 4.)



New contact: basic information and, further down, channels, tags, groups and custom fields.

Basic information

Who is this contact? A display name or a first/last name is required.

Field	Detail
Contact photo	Drag an image or tap to pick it (JPG, PNG or WebP, up to 2 MB), or use a URL instead.
First name and **Last name**	Separately, to greet them properly and sort.
Display name	How they show up in the inbox and the CRM. If you leave it empty, first + last name is used.
Email	Their email address.
Phone (E.164)	In international format, with + and country code: +593991234630.
Company and **Job title**	Where they work and what they do.
Country (ISO-2), **City**, **Address**	Country as two letters: EC, CO, MX, BR, US...
Locale	Their language and region, for example en-US.
Gender	Not specified, Male, Female, Other or Unknown.
External ID	For API integrations: the customer's code in your other system.
Notes	Anything you want to remember.

Further down

Section	What it is
Channels	How this person can be reached on each channel: the channel and their identifier on that platform. **Add channel** adds another.
Tags	One click adds or removes each tag; you can also create a new one with its color.
Groups	Which groups they belong to.
Custom fields	Your workspace's contact fields. Required ones are marked with *.

Save takes you straight to their profile (chapter 29). From a contact's edit screen you also have **View**, **Delete** and **Block / Unblock contact**.

> **TIP**
> Contacts who write to you on WhatsApp, Instagram, Messenger or your website chat are created automatically, with their channel. The AI can fill in the name, email and other details while it chats.

34

CHAPTER 34

Groups, tags and bulk actions

Organize your customers and work with many at once.

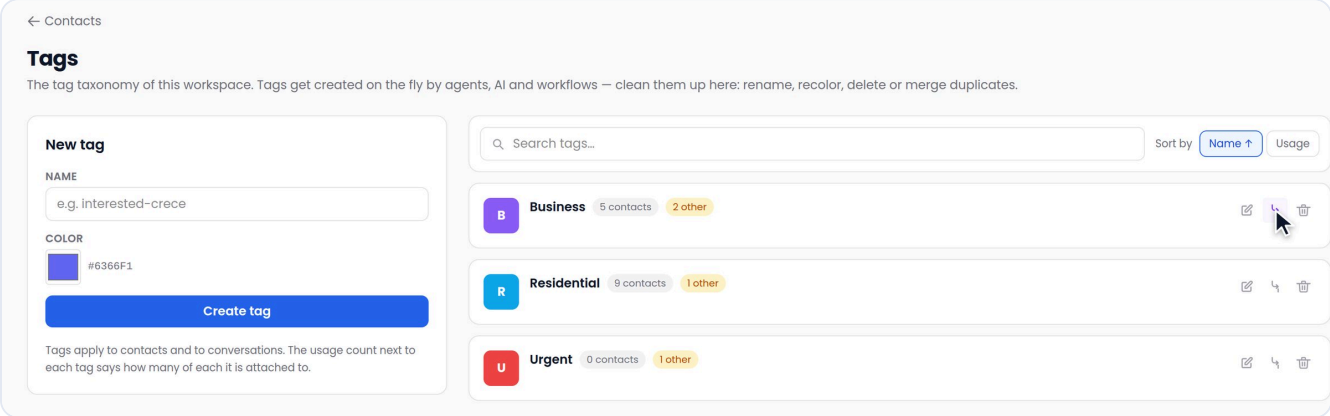
Groups

Groups are lists you build yourself, like **Quito customers**: curated lists of contacts to use as broadcast audiences or to filter the inbox. In **Groups**, **New group** asks for the **Name**, an optional **Description** and a **Color** → **Create group**. Each group shows how many contacts it has, with **Edit** and **Delete**.

> **WATCH OUT**
>
> Deleting a group does not delete its contacts: it only removes their membership. But campaigns aimed at that group are left without an audience.

Tags

Tags mark traits: Residential, Business, Urgent, Customer. They are created automatically when a person, the AI or a workflow applies them. In **Tags** you see them all, with how much each one is used (contacts, conversations and others).

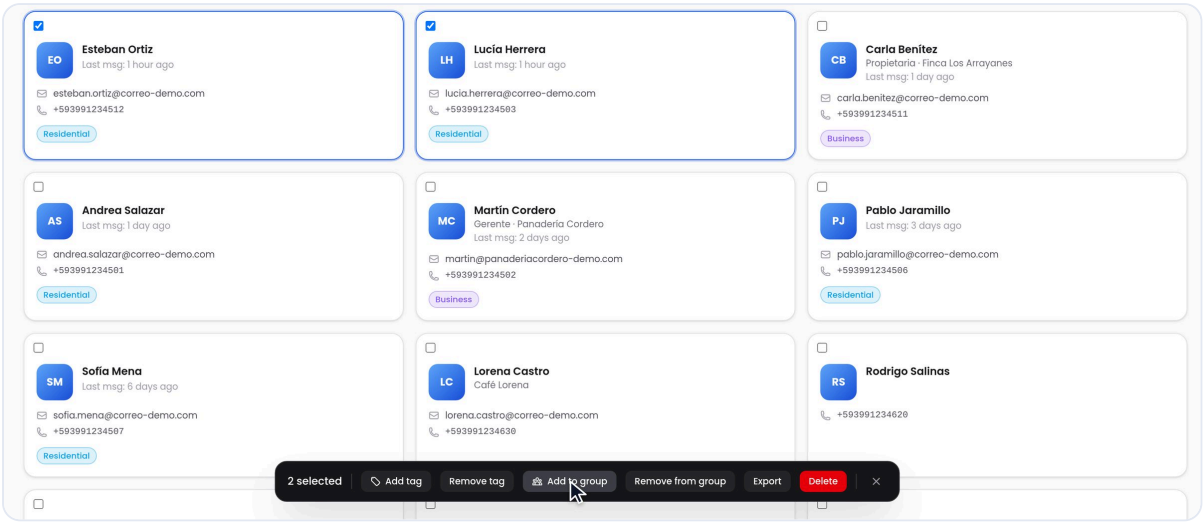


Tags: create, search, sort by name or usage, edit, merge and delete.

Action	How
Create	**New tag**: Name (e.g. interested-crece) and Color → **Create tag**.
Search and sort	"Search tags..." and **Sort by** Name or Usage.
Edit	Change the name or color.
Merge with another tag	Two tags that are the same ("urgent" and "Urgent"): pick the surviving tag and the final name. Their contacts and conversations move to the one that stays, without duplicates, and the other one is deleted.
Delete	Warns that workflows, campaigns and filters that use it will stop matching.

Bulk actions

In the contact list, tick several (or **Select all on page**) and the action bar appears:



With contacts ticked, the bulk action bar appears.

Action	What it does
Add tag / **Remove tag**	Pick the tag and click Apply: “Add tag to N contacts”.
Add to group / **Remove from group**	Pick the group: “Add N contacts to group”.
Export	Downloads the selected ones as CSV.
Delete	“Delete N contacts?”. Conversations are kept.
Clear selection	Unticks everything.

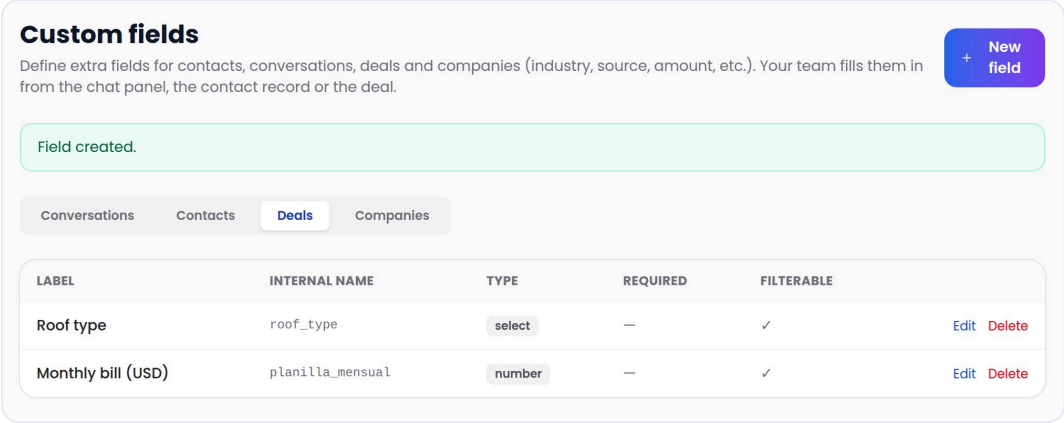
35

CHAPTER 35

Custom fields

What is specific to your business, in named fields.

Custom fields store what is specific to your business: the roof type, the monthly bill, the policy number, the contract expiry date. They are created in **Workspace settings** → **Custom fields**, which defines extra fields for contacts, conversations, deals and companies.



Custom fields → Deals: Roof type (choice) and Monthly bill (number).

For which entity

The tabs separate the fields for **Conversations**, **Contacts**, **Deals** and **Companies**. Deal fields appear in the new deal form and in each deal's sidebar; contact fields, on the contact profile and form.

Creating a field: Roof type

1. Open the **Deals** tab and click **New field**.
2. **Applies to**: Deals (it cannot be changed later).
3. **Visible label**: “Roof type”. The **Internal name** is generated automatically (roof_type); don't change it once you start using it.
4. **Type**: Single choice.
5. **Options (one per line)**: Concrete, Tile, Metal. (Advanced format: value|Label.)
6. If you like, a **Default value** and the **Required** checkbox.
7. Click **Save**.

Type	For…
Short text / Long text	Names, codes, descriptions.
Integer / Decimal	Quantities, amounts, kW.
Date / Date and time	Expiry dates, installations.
Single choice / Multiple choice	One or several options from a list.
Yes / No	A checkbox.
URL, Email, Phone	Links and contact details, validated.

From then on, the field appears in the new deal form and on each deal's record. A choice field shows “— Select —”; a Yes/No, Yes and No. If a required field is empty or a value is not valid, “Some custom fields could not be saved. Check the highlighted fields.” appears.

> **NOTE**
> Deleting a field removes it from the screens, but the stored values are kept.

WATCH OUT

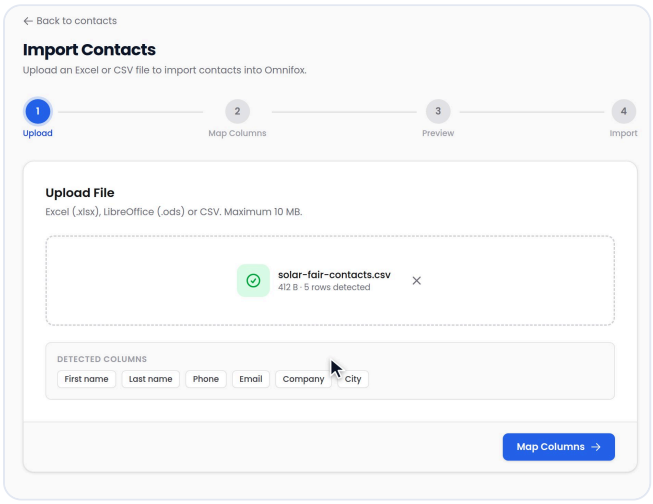
Custom fields are included from the **Crece** plan up. On Lite, Impulsa and Conecta the screen says “Available from the Crece plan”, with View plans.

CHAPTER 36

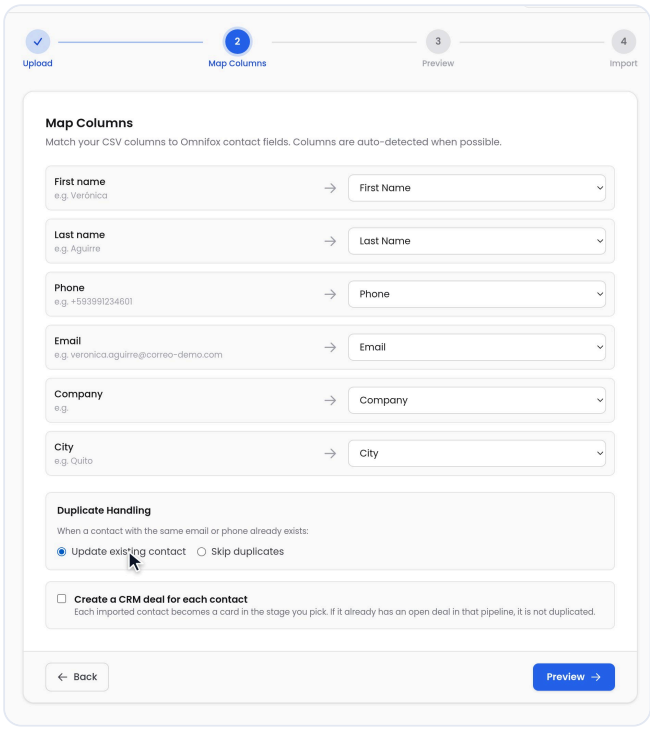
36 Importing contacts and creating deals

A whole list into the CRM, in four steps.

Import CSV, in Contacts, brings in contacts from a file and, if you want, creates a deal for each one. There are four steps: **Upload**, **Map Columns**, **Preview** and **Import**.



Import contacts, step 1: the uploaded file and the detected columns.



Step 2: each column with its field, duplicate handling and “Create a CRM deal for each contact”.

1. Upload

It accepts **Excel (.xlsx), LibreOffice (.ods) or CSV, up to 10 MB**. Drag the file or click **Choose File**. Omnifox tells you how many rows it detected and which columns it found. Sol Andino uploads the list of leads from a solar fair.

2. Map Columns

Omnifox recognizes columns by their headers (“first name”, “last name”, “phone”, “email”...) and suggests which field each one goes to: First Name, Last Name, Display Name, Email, Phone, Company, Job Title, Country, City, Address, Locale, Gender, Notes or a custom field. Fix the wrong ones or choose to skip the

column.

Duplicate Handling	When a contact with the same email or phone already exists…
Update existing contact (default)	Its data is completed and updated with the file's.
Skip duplicates	It is left as it was and that row is skipped.

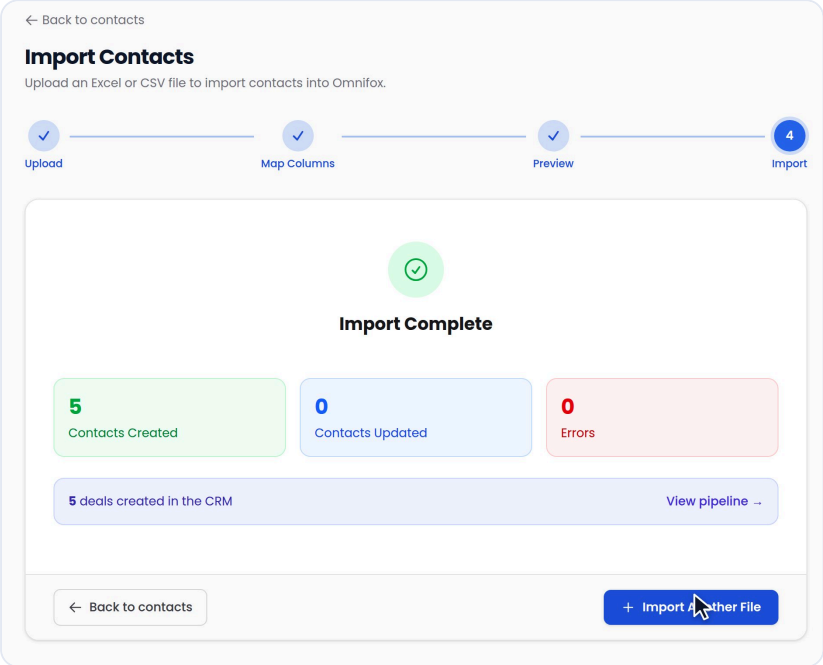
And the best part: tick **Create a CRM deal for each contact** and pick the **Stage** (the list shows "Pipeline › Stage"). Each imported contact shows up as a card in the stage you pick; if it already has an open deal in that pipeline, it is not duplicated.

3. Preview

The first rows, as they will end up, with the warnings for each row (a mistyped email, a phone without a country code). Review and import.

4. Import

A small file is imported on the spot; a large one, in the background, with progress ("Importing contacts…", "N of M rows processed"): you can close the screen.



Import complete: created, updated, errors and the deals created, with View pipeline.

When it finishes you see how many contacts were **created**, how many were **updated** and how many rows had **errors** (with **Download to fix**, to correct them and import just those again), and "N deals created in the CRM" with **View pipeline**. There they are: marked ⬆️ **Imported**, with you as owner and the contact's name as title. **Import Another File** starts over.

> **TIP**
> Before importing, check the phone numbers: with + and country code. That is what Omnifox uses to recognize the customer when they write to you on WhatsApp.

37

CHAPTER 37

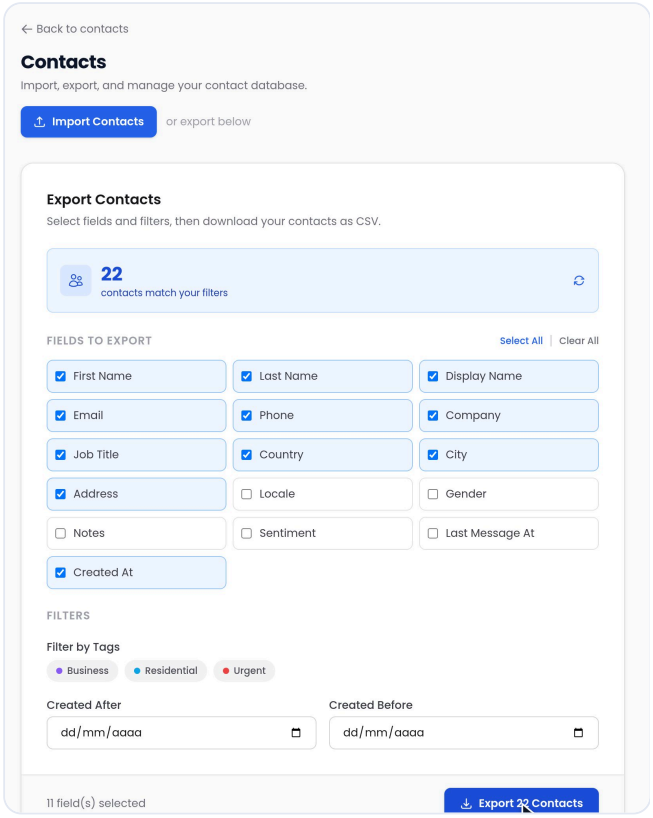
Exporting contacts

Your contacts, in a file.

Export downloads your contacts as a CSV file: select fields and filters, then download.

1. Under the fields to export, tick the ones you want. First name, Last name, Display name, Email, Phone, Company, Job title, Country, City, Address and Created date come ticked; you can add Locale, Gender, Notes, Sentiment and Last message. **Select all** and **Clear all** help.
2. If you like, filter: **Filter by tags**, **Created after** and **Created before**.
3. The counter tells you how many you will download ("21 contacts match your filters").
4. Click **Export N contacts**.

The file uses a comma (,) as separator and UTF-8, so accents and special characters display properly in Excel and Google Sheets.



Export: fields to export, filters by tags and date, and the contact counter.

> **NOTE**
> To download just some contacts, tick them in the list and use Export in the bulk action bar (chapter 34). Exporting requires the manage contacts permission.

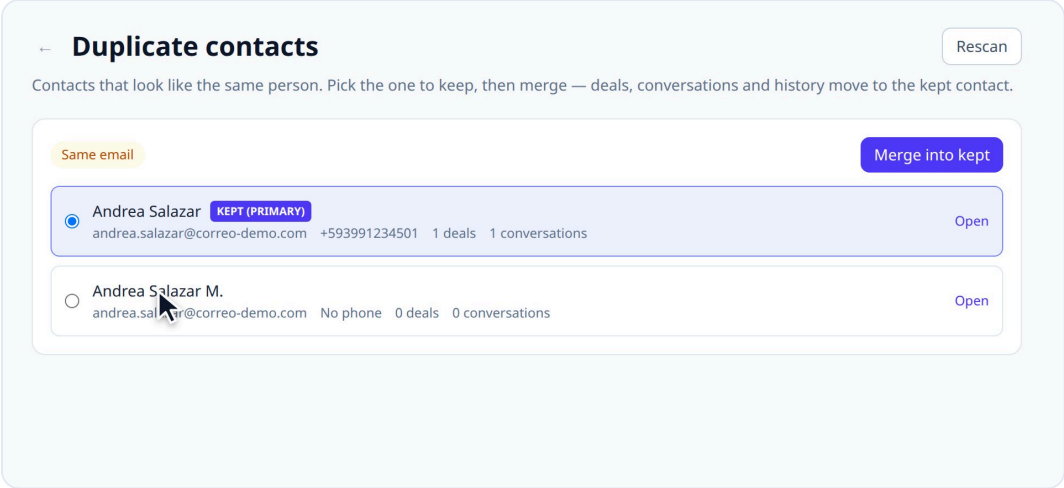
38

CHAPTER 38

Duplicate contacts

The same person, twice: merge them into one.

Duplicates finds contacts that look like the same person. Here Andrea appears twice, because she also wrote through the website chat.



Duplicate contacts: the “Same email” group, the one to keep and Merge into kept.

Reason	When it detects it
Same email	Two contacts with the same email.
Same phone	Two contacts with the same number.
Similar name	Very similar names (“Andrea Salazar” and “Andrea Salazar M.”) among the most recent contacts.

Each contact in the group shows their email and phone, how many deals and conversations they have, and **Open** to look at it first. Omnifox suggests keeping the one with the most history (“Kept (primary)”).

1. Pick which one to **keep** (the circle on the left).
2. Click **Merge into kept**.
3. Confirm: “Merge these contacts?” The other contact is merged into the kept one and then deleted.

Their **deals, conversations, activities, tags and fields** move to the one you keep. When it is done, “Contacts merged.”. If none are left, “No duplicate contacts found. Nice and tidy!”. **Rescan** searches again.

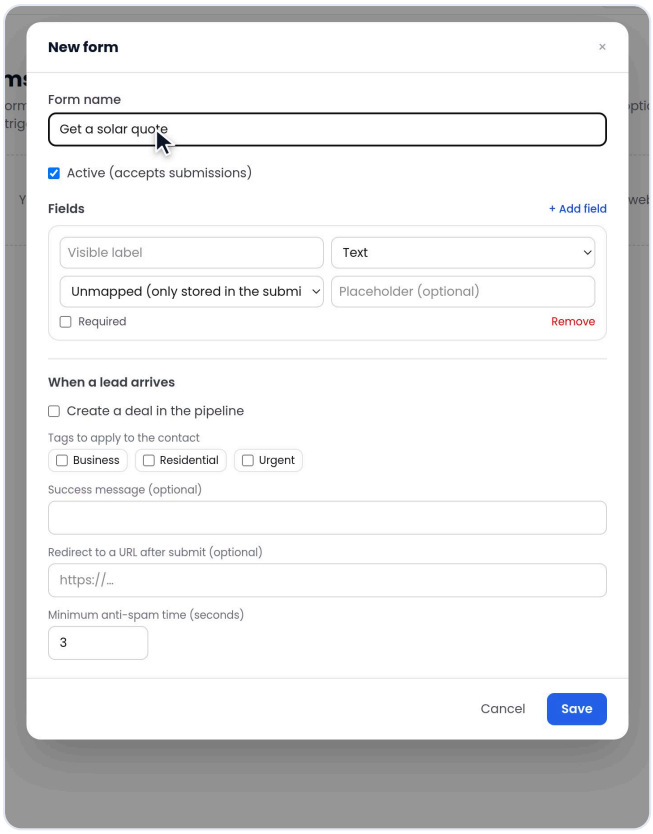
> **WATCH OUT**
>
> A merge **cannot be undone**. Check with Open that they really are the same person: two siblings may share the home phone.

CHAPTER 39

39 Lead capture forms

Customers from your website, straight to the pipeline.

Lead capture forms bring in customers from your website: “Get a quote for your solar system”, “Book a site visit”. You get there from the 📝 **Forms** button in the Pipeline. Each submission creates (or completes) a contact and, if you want, a deal.



New form: name, fields with their mapping and what to do when a lead arrives.

New form

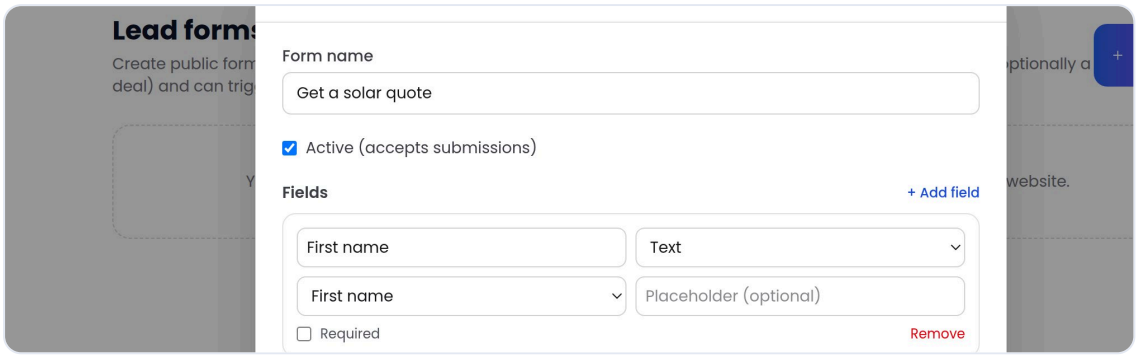
1. Click **New form** and type the **Form name**.
2. Leave **Active (accepts submissions)** ticked.
3. Under **Fields**, **+ Add field** for each piece of information you want to ask for (table below).
4. Choose what to do **When a lead arrives**.
5. Click **Save**.

Each field	What you enter
Visible label	What the customer sees: “Your name”, “WhatsApp”, “How much is your power bill?”.
Type	Text, Email, Phone, Long text, Number, List (select) or Checkbox.
Placeholder (optional)	The sample text inside the field.
Options	For List: one option per line.
Required	Whether it is mandatory.
Mapping	Which contact detail it fills: First name, Last name, Email, Phone, Company, Job title, City, Country (2 letters) or a custom field. Unmapped, it is only stored with the submission.

When a lead arrives	What it does
Create a deal in the pipeline	Creates a card in the first stage of the pipeline you pick (or the default pipeline), with the contact's name as title and the 📝 Form origin.
Tags to apply to the contact	Tick the ones you want: for example, Residential.
Success message (optional)	What the customer sees after submitting.
Redirect to a URL after submit (optional)	For example, your thank-you page.
Minimum anti-spam time (seconds)	Submissions faster than this (3 seconds by default) are treated as bots and discarded.

Sharing it

In the list, each form shows whether it is Active or Inactive, how many leads it captured and its fields, with **Open** (its public link, to share on social media or by email), **Embed code (iframe)** (to paste on your website), **Activate/Deactivate**, **Edit** and **Delete**. The public form comes with spam protection: the minimum time and a limit on submissions per minute.



What happens with each submission

- The contact is created with the **Lead form** channel. If the phone number already exists, that contact is used and only empty details are filled in.
- The tags and mapped custom fields are applied.
- If you chose it, the deal is born in the pipeline (or the open one is reused, chapter 5), marked 📝 **Form**.
- “Contact created” workflows fire, for example a welcome WhatsApp message.

New contacts reach the pipeline as cards in the first stage.

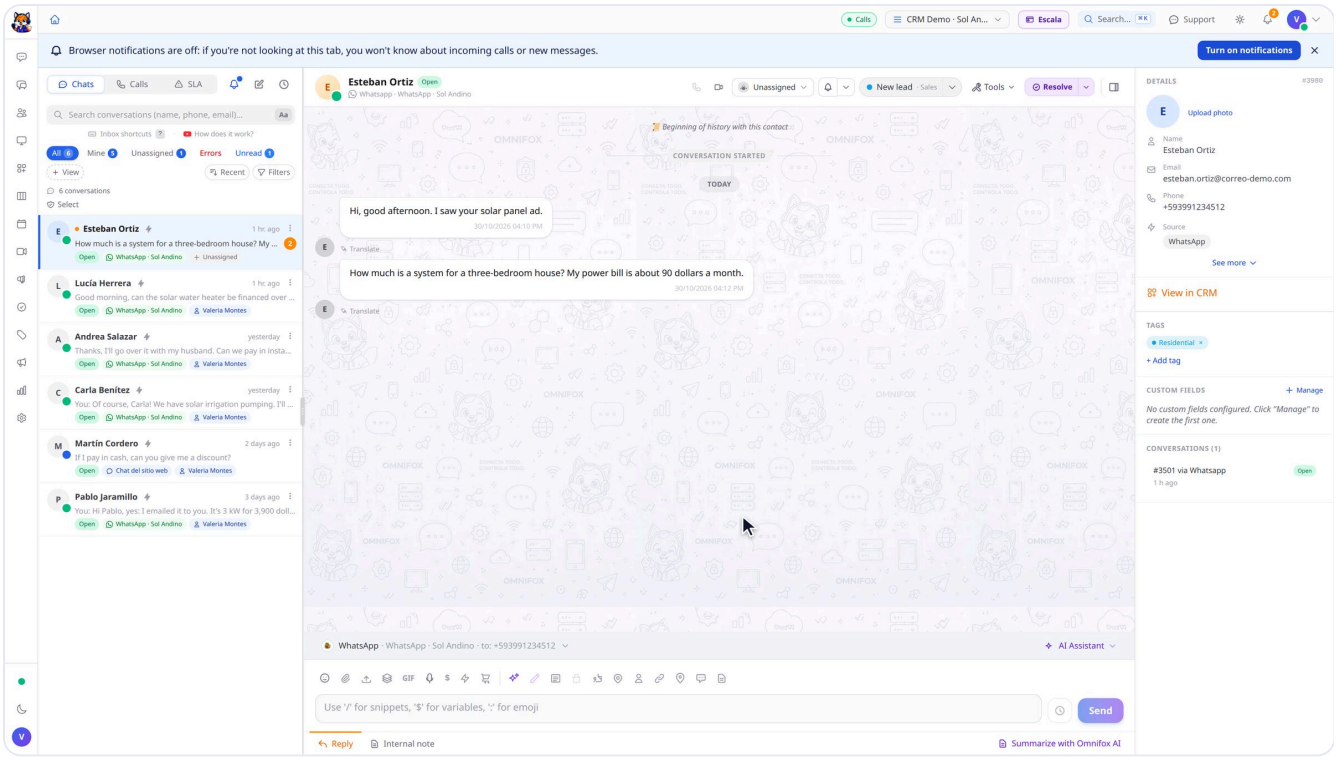
40

CHAPTER 40

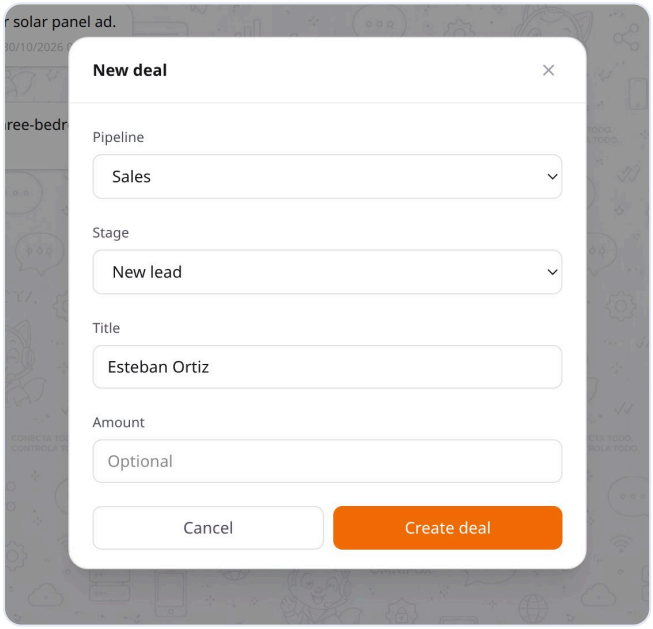
From chat to sale

The CRM's most used door: the inbox.

Esteban has just written on WhatsApp asking how much a system for his house costs. In the chat header, the **CRM** button (“Convert to opportunity”) turns it into a sale.



Esteban's conversation in the inbox; in the header, the CRM pill with the pipeline and stage.



From the chat: New opportunity with pipeline, stage, title and amount.

Creating the deal

1. Click **CRM** in the chat header.
2. Pick the **Pipeline** and the **Stage** (the default pipeline and its first stage come preselected).
3. Check the **Title** (the contact's name by default) and, if you like, the **Amount** (“Optional”).
4. Click **Create opportunity**.

It is linked to the customer and marked 💬 **From a conversation** (“Born in this conversation”).

The chat pill

From then on, the chat header shows a pill with the **pipeline and stage** (“Sales · New lead”), in the stage's color.

On the pill	What it does
Change stage	Moves it without leaving the inbox. If you pick Lost, it asks for the reason.
A click on the pill	Opens its record in the pipeline.
“N more open opportunities”	If the customer has sales in other pipelines, switches between them.
Add to another pipeline	Creates a deal for this customer in another pipeline.

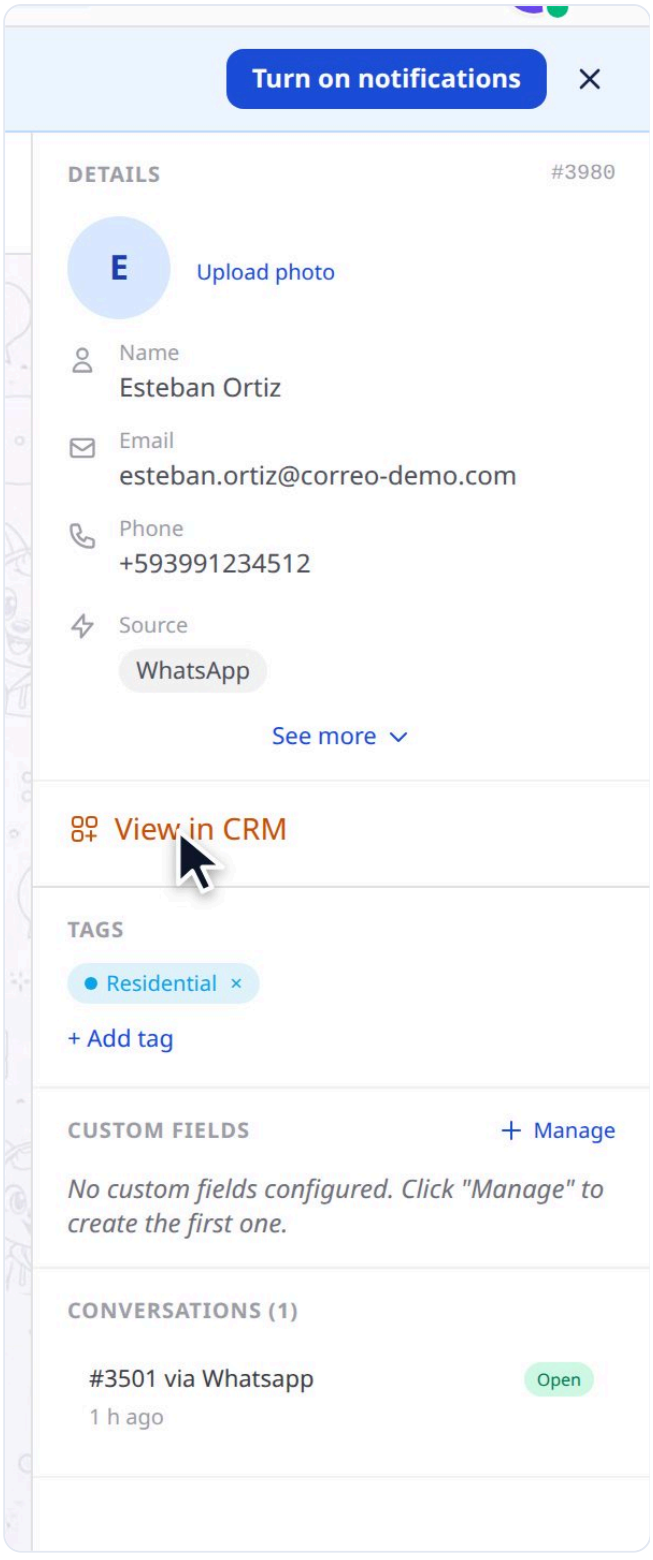
If the customer already had an open deal in that pipeline, the dialog warns you (“already has an open one — it will be moved”). If you create it directly in Won or Lost, it says “Deal saved as won.” (or lost) with **View**. Everything syncs live with the pipeline.

View in CRM

In the contact's right-hand sidebar, **View in CRM** opens their full profile (chapter 29).

And in Team

When someone shares a conversation in Team (internal messaging), the **Customer context** panel shows the contact, their active deal (pipeline, stage and amount) and their recent activity, with buttons to open them in the CRM, open the conversation and open the deal.



In the contact sidebar, View in CRM opens their profile.

TIP

Turn **every chat with buying intent** into a deal: when they ask for a price, request a quote or want to book. It is the quickest way to make sure nothing slips through.

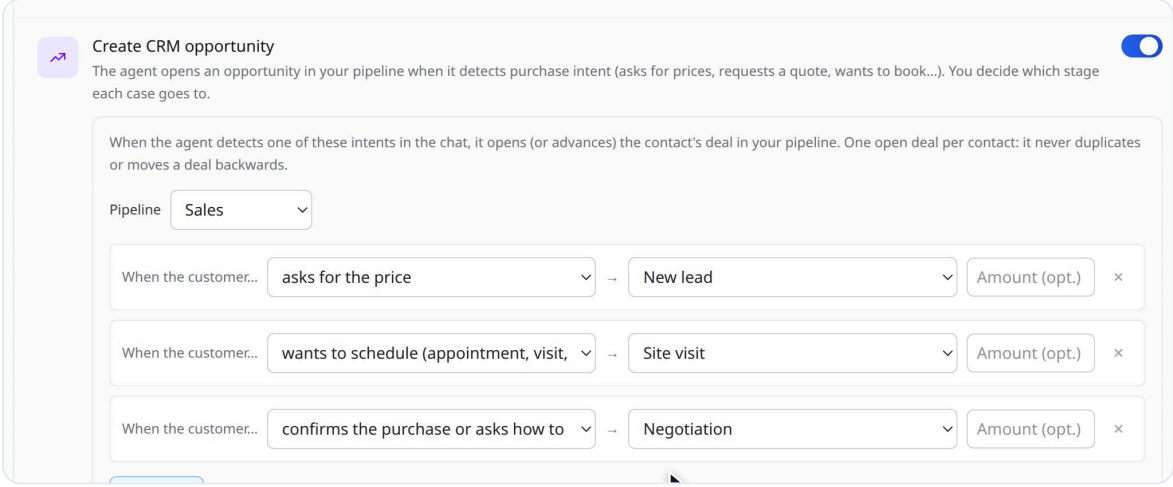
41

CHAPTER 41

The AI agent that creates deals

The AI that answers also opens the sale.

If you have an AI agent handling your chats, it can also **create deals by itself**. In its editor, Tools tab, turn on **Create deal in the CRM**: when the agent detects one of these intents in the chat, it opens (or moves forward) the contact's deal in your pipeline.



The AI agent's Create deal in the CRM tool, with its “When the customer... → Stage” rules.

1. Pick the **Pipeline**.
2. Add rules with **+ Add rule**: **When the customer...** + the intent → the **Stage** (and, if you like, a **Default amount**).
3. Save the agent.

Intent	Sol Andino rule
asks for the price	→ New lead
asks for a quote	—
wants to schedule (appointment, visit, demo)	→ Site visit
confirms the purchase or asks how to pay	→ Negotiation
shows interest in a product or service	—

Without rules, the agent doesn't know when to create it: “Without rules the agent does not know when to create the deal.”.

The hard rules

- **It never duplicates**: if the customer already has an open deal in that pipeline, it reuses it.
- **It only moves forward**: it moves the deal to the rule's stage if that stage is further along; it never moves it back.

- It leaves a **note** on the deal explaining why it created or moved it.
- The card carries the little fox 🦊 **AI** and is linked to the conversation.
- The Dashboard counts how many the AI created this month (“N created by AI this month”).

> **NOTE**
> Other agent tools fill in the CRM without you asking: updating the contact's fields (name, email, company...), their tags and their lifecycle stage. The lifecycle also moves forward by itself with deals: open → opportunity, won → customer.

> **TIP**
> For the agent in detail —instructions, tools, tester— see the “AI Agents complete guide”.

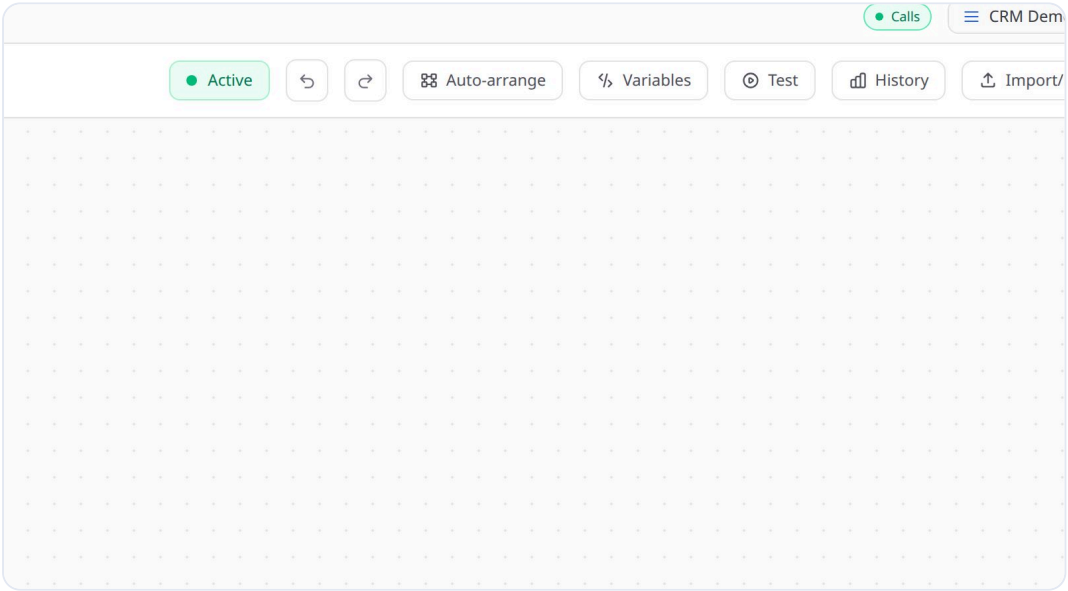
42

CHAPTER 42

Workflows with the CRM

For anything that needs waits, conditions or messages.

Pipeline automations (chapter 21) cover one-line rules. For more advanced needs there are Omnifox **workflows**, with their CRM triggers and actions. Every pipeline automation you built can be opened here, in the advanced editor (**Open in the advanced editor**), to add waits, conditions or messages.



A pipeline rule, with its button to open it in the advanced workflow editor.

CRM triggers	When they fire
Deal created	When a deal is born, from anywhere.
Stage changed	When it moves to another stage.
Deal won / lost	When it closes.
Priority changed	When its priority changes.
Days without activity	When it goes N days without anyone touching it.
Days in a stage	When it sits N days in the same stage.
Customer silent	When the customer has not replied for N days.
Activity overdue	When an activity passes its date without being done.
Relative date	Some time before or after the expected close date.

CRM actions	What they do
Create deal	With a title (it accepts variables like the contact's name), pipeline, stage, amount, currency, priority, tags and owner: a person, the conversation's assignee, a team or automatic distribution.
Update deal	Changes its stage, amount, priority or other data.
Assign owner	Sets or changes who handles the sale.
Log activity	Adds a note, call, task...
Companies and links	Create or update a company and link records.
Create a board card	Sends the sale to a project board, for example to coordinate the installation.

Example: *when a deal is marked **won** → send a welcome message on WhatsApp → wait 2 days → create the "Installation" card on the project board → wait 30 days → send the satisfaction survey.*

> **NOTE**
> Workflows have their own limits depending on your plan, and pipeline automations count as workflows. For details, see the Workflows guide.

43

CHAPTER 43

The CRM on your phone

Your sales in your pocket.

The CRM also works on your phone, in two ways.

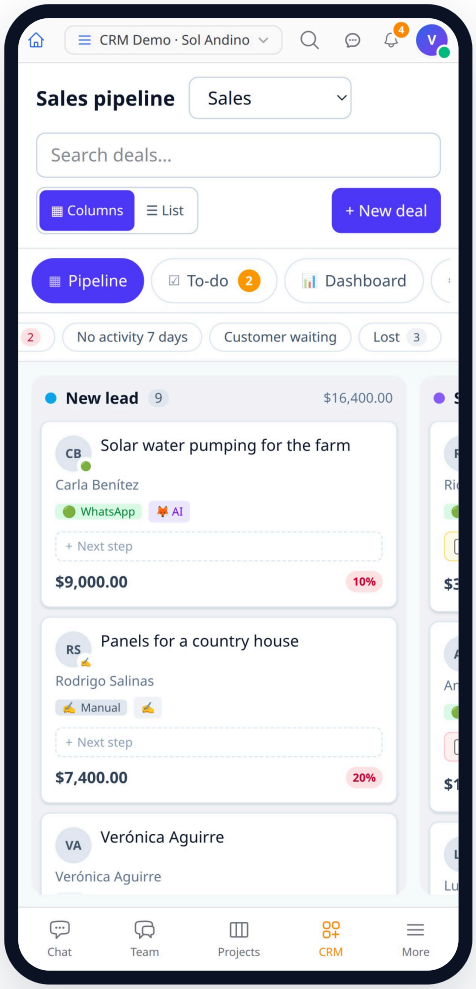
In the browser

Open Omnifox in your phone's browser. The pipeline shows **one column at a time** and you swipe between stages; the CRM submenu is a row of buttons that also swipes. The deal record opens full screen. The List view has its own **Sort by** selector.

Desktop work —Forms, Automations and bulk Select — does not appear on a phone.

In the Omnifox app

Screen	What you can do
Pipeline	Pick the pipeline and stage and see their deals.
Deal record	See the contact, company, owner, close date and probability; move stage; mark won or lost with a reason; open the conversation.
CRM tasks	Your tasks and what they belong to, mine or all, and complete them with a tap.
Contact profile	Their history.



The pipeline on a phone: one column at a time and the submenu as a row of buttons.

CRM reminders and alerts arrive as notifications in the app (chapter 24).

TIP

Creating and editing tasks, and setting things up, is done on the web. To create deals from your phone, the most practical way is from the chat, with the CRM button: that way they are linked to their contact.

NOTE

You can also add a deal from the app, always with its **contact**: just like on the web, it's required. If you don't choose a currency, it starts in the workspace's Main currency.

44

CHAPTER 44

Permissions and plans

What each plan includes and what each role can do.

The CRM is included in **every** Omnifox plan. What changes with the plan is CRM AI and custom fields.

By plan

	Lite	Impulsa	Conecta	Crece	Escala	Exclusivo
CRM (pipeline, to-do, dashboard, settings, contact profile)	✓	✓	✓	✓	✓	✓
Contacts, groups, tags, import, export, duplicates, forms	✓	✓	✓	✓	✓	✓
Pipeline automations	✓	✓	✓	✓	✓	✓
CRM AI (Next best action, AI summary) — uses per month	0*	0*	0*	1,000	10,000	Unlimited
Custom fields	—	—	—	✓	✓	✓

* 0 = not included, unless you turn on pay-as-you-go overage, charged to your Omnifox Balance. Each use of CRM AI consumes AI tokens from your plan's allowance. Workflows have their own limits per plan.

If your plan doesn't include CRM AI, or the month's allowance is used up and there's no balance, the AI buttons (✨ **Suggest** in Next best action and **Generate summary** in the AI summary) are **disabled** and show the reason —"Your plan does not include CRM AI." or "This month's AI allowance is used up and there is no balance to continue."— with the **See plans and balance** link. The rest of the CRM keeps working as usual.

By role

Action	Seller (agent)	Admin / owner
See the pipeline, To-do, the Dashboard and the contact profile	✓	✓
Create, edit, move, win, lose, reopen and duplicate deals	✓	✓
Delete a deal (one at a time)	✓	✓
Activities, next steps, files, products and comments	✓	✓
Reassign, move and close in bulk	✓	✓
Delete in bulk	—	✓
Set the monthly goal	—	✓
Settings: pipelines, stages, reasons	Read only	✓
Pipeline automations: install, create, edit, pause, delete	Read only	✓
Delete a comment	Only their own	Only their own

If a seller tries a restricted change, Omnifox replies that only an admin can change the CRM settings (or delete deals in bulk).

Contacts

Action	Permission
See the list, groups, tags and forms	View contacts.
Create and edit contacts, import, export, delete, unblock	Manage contacts (the Agent role has it by default; a custom role may not).
Custom fields	View workspace settings.

Scope

Everything is separated by **workspace**: each workspace has its own pipelines, deals, contacts, goal and automations, and nobody sees another workspace's data. Contact merges never cross workspaces. For integrations, API tokens need the CRM permission (read or write).

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CHAPTER 45

Best practices

Seven habits that make the CRM work for you.

1. No open deal without a next step

It is the golden rule. A sale with no next step is a sale nobody is working. When you complete a step, schedule the next one right away.

2. To-do every morning

Start the day with To-do: Overdue first, then Today. And in the Pipeline, the Customer waiting filter.

3. The Dashboard every Monday

How is the goal going?, why are we losing?, who has overdue steps? Ten minutes that organize the week.

4. Stages that describe the customer

“Asked for a price”, “Visit done”, “Proposal sent”: what the customer does, not what you do. That way moving a card is a clear decision.

5. Always the reason when losing

It is optional, but without reasons “Why we lose” tells you nothing. Few reasons, clear and actionable.

6. One goal per month

Without a goal there is no way to know whether the month is going well. A single figure, for the whole workspace.

7. Every chat with buying intent, into the CRM

Asks for a price, requests a quote or wants to book: CRM button in the chat. Or let your AI agent do it.

And also…

One currency; an owner on every sale; only delete what was loaded by mistake; comments for the team and notes for the record.

Common mistakes

Mistake	What happens	Better
Deleting sales that didn't happen	They disappear from the win rate and Why we lose.	Mark them lost, with their reason.
Cards with no owner	Nobody gets the alerts; “By seller” shows them as Unassigned.	Always an owner, or automatic distribution through a workflow.
Ten stages or more	The columns can't be read and nobody knows where each card goes.	Between four and seven open stages.
Leaving the amount at 0	The pipeline and Dashboard don't say how much is at stake.	An estimated amount from the start, or the quote in Products.
Contacts without a country code	Duplicates and chats that don't link to the contact.	Phone numbers with + and country code.

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CHAPTER 46

Troubleshooting and FAQ

If something doesn't show up or doesn't work as you expected.

Troubleshooting

Symptom	Likely cause	What to do
I can't see the CRM in the menu.	You are in another workspace, or the CRM is not enabled on your account.	Switch workspace at the top. The CRM comes with every plan; if it still doesn't show, contact support.
I created a deal and no new card appeared.	The customer already had an open one in that pipeline: that one was moved.	Click “Open the deal” in the notice, or search for it by the customer's name.
I'm not getting reminders.	The activity has no date, has “No reminder”, you are not the owner or you turned the alerts off.	Check the activity (chapter 11) and your notification preferences (chapter 24).
The reminder arrives at another time.	Your profile has a different time zone.	Check the time zone in your profile.
The AI doesn't suggest / doesn't generate the summary.	Your plan's AI allowance is used up, or your plan doesn't include it.	Check your AI usage; turn on overage or upgrade your plan (chapter 44).
I can't change settings, the goal or automations.	They are for admins only.	Ask an admin.
I can't delete a pipeline.	It still has deals.	Move them to another pipeline or delete them first.
I can't close a sale as won.	The pipeline has no stage flagged as Won.	Flag one in Settings (chapter 26).
“Custom fields” doesn't show up.	Your plan is Lite, Impulsa or Conecta.	Available from Crece.
The Products tab says the catalog is not enabled.	Your workspace doesn't have the catalog module.	Type the amount by hand in Estimated value.
I can't import or export contacts.	Your role doesn't have the manage contacts permission.	Ask an admin.
The CSV shows everything in one column.	The separator is not the one your program expects.	In Excel, Data → Text to Columns; in Sheets, Split text to columns.
An “N days” automation didn't fire instantly.	Time-based triggers are checked every hour (or once a day).	Wait for the next check.

Frequently asked questions

How many deals and pipelines can I have?

As many as you need, on every plan. The only limit is one open deal per customer in each pipeline.

What is the difference between a deal and a contact?

The contact is the person over time; the deal is a specific sale with that person. A contact can have many deals, one open per pipeline.

Can I have the same customer in two pipelines?

Yes, with one open deal in each. For example, a sale in Sales and a contract in Maintenance.

I deleted a deal by mistake. Can it be recovered?

Not from the screen. That is why it is best to mark sales that didn't happen as lost: they stay in the history and can be reopened.

Do customers see comments or notes?

No. Everything in the CRM is internal: the customer only sees what you write to them in the chat and the appointments you book for them.

Is the amount calculated automatically?

If you add products in the Products tab, yes: the amount becomes the quoted total. Otherwise, it is whatever you type.

Can I use the CRM without WhatsApp?

Yes. You can add deals by hand, import them or receive them through forms. But the CRM works best connected to your chats.

Does the AI create deals without my knowing?

Only if you turned on your agent's Create deal in the CRM tool and gave it rules. Those cards carry the little fox and a note with the reason.

Can I rename stages that have sales in them?

Yes: the cards stay in their stage with the new name. If you delete a stage, its cards move to the neighboring one.

How do I see only my sales?

With the **Mine** filter in the Pipeline, and in To-do with **Mine**.

Where can I see how much a customer bought from me?

On their profile, the **Won** number (chapter 30).

Does the Dashboard count every pipeline?

Yes, all the workspace's pipelines together.

APPENDIX

Glossary and manual version

The CRM's vocabulary, and this manual's version.

Glossary

Term	What it means
Deal	A sale in progress with a customer. On screen, a card.
Contact	The person or company over time, with all their conversations and sales.
Pipeline	The path a sale follows, split into stages. You can have several.
Stage	Each step of the pipeline; a column in the board.
Won / Lost stage	The stages carrying those flags: they close the sale.
Next step	The next thing to do with a sale, with a date and a reminder.
Activity	A note, call, meeting, email or task, on a deal or a contact.
To-do	A next step or task not yet completed; they show up in To-do.
Origin	How the card was born: conversation, by hand, imported, automation, form or AI.
Channel	Where the customer came from: WhatsApp, Instagram, Web chat, Lead form...
Owner	The person on the team who handles the sale.
Probability	How likely the sale is to close, from 0 to 100 %.
Expected close	The date you expect to close the sale.
Win rate	Won out of closed, over the last 90 days.
Monthly goal	How much the workspace wants to close in the month.
Reason	Why a sale was won or lost.
Pipeline automation	A one-line rule: when this happens, do that.
Workflow	An advanced automation, with waits, conditions and messages.
Next best action	The AI's suggestion on what to do now with a sale.
Contact profile	The screen with a customer's whole history (360 profile).
Custom field	A piece of data specific to your business, added to deals, contacts, conversations or companies.
Workspace	Each separate area of your account, with its own CRM.

Version of this manual

Version	Date	Changes
1.0	October 30, 2026	First edition: the 46 chapters of the “CRM complete guide” video, expanded with every option, plus the introduction, quick start, permissions and plans tables, troubleshooting and glossary.
1.1	November 1, 2026	CRM main currency and per-currency totals on the Dashboard (chapters 25 and 26); contact required in the app and the API too (chapters 4 and 43); AI buttons disabled with their reason when the plan doesn’t include AI or the allowance ran out (chapters 10, 30 and 44).

Screens may change slightly with Omnifox updates. Sol Andino's names, data and conversations are fictional.



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**.