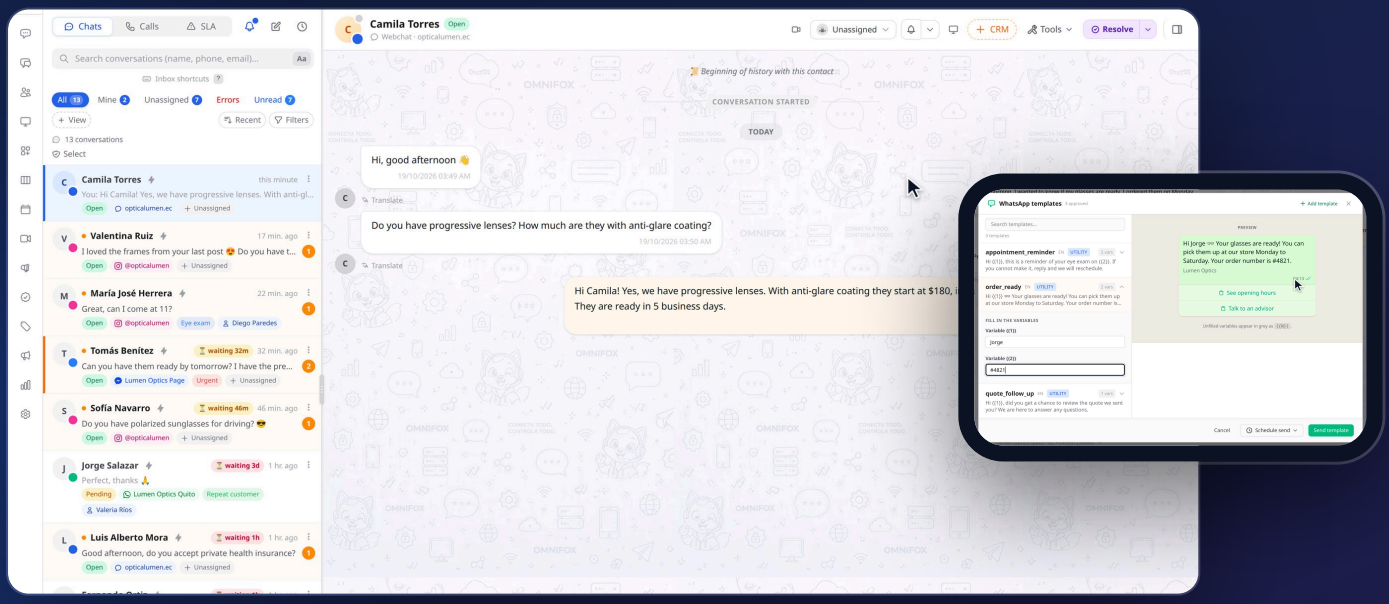
Omnifox

USER GUIDE

Inbox

All your WhatsApp, Instagram, Messenger and website conversations in a single list, so your team replies fast and no customer is left waiting.



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How to read this guide

The screenshots are real Omnifox screens with a sample business, **Lumen Optics**, a fictional optical store in Quito with three people on the team: Valeria, Diego and Lucía. Customers and messages are made up.

Button and field names are in **bold**, exactly as they appear on screen. There is a video with this same walkthrough on the Omnifox YouTube channel.

01

CHAPTER 1

What the Inbox is

The place where every conversation with your customers arrives, from every channel, so the whole team can handle them from one screen.

The Inbox (**Inbox** menu) brings WhatsApp, Instagram, Messenger and your website chat together in a single list. Each conversation shows which channel it came from, its status and who is handling it, so nobody answers the same thing twice and no customer is left waiting.

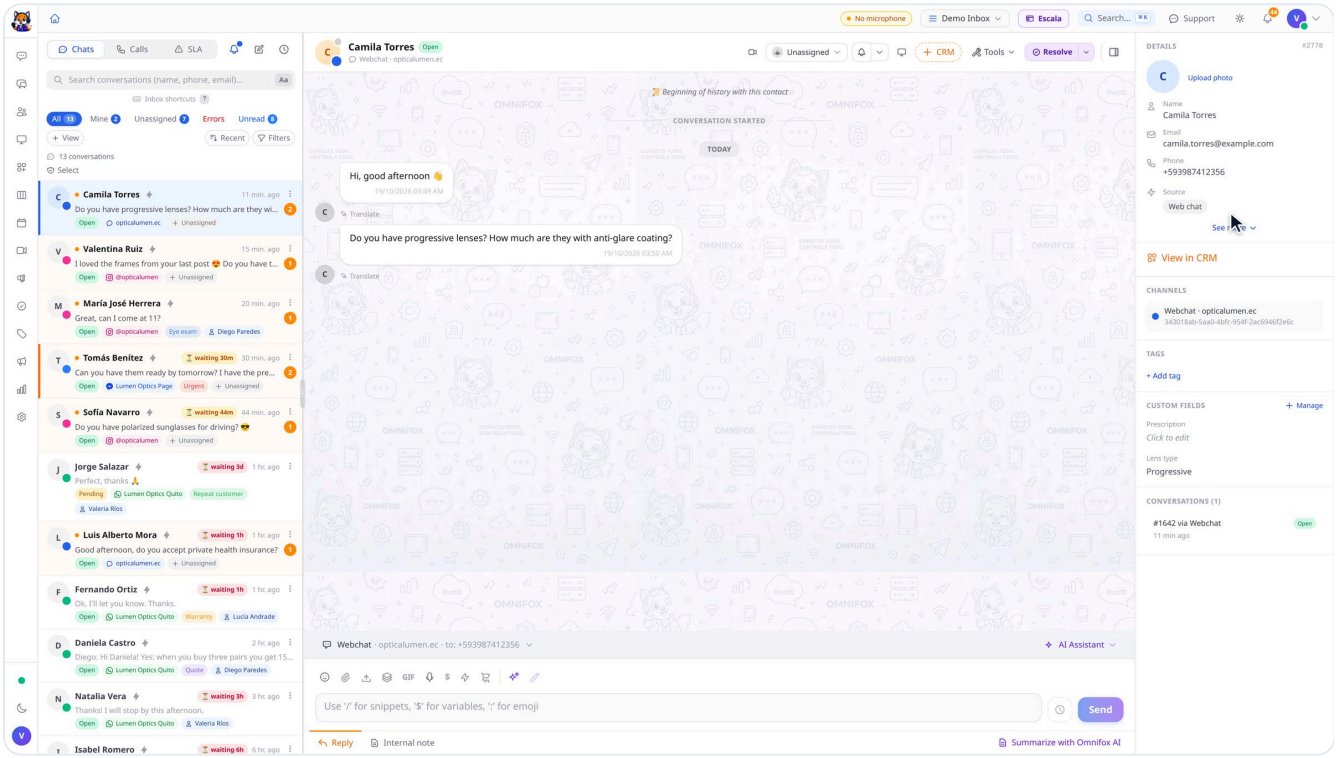
List
Tabs, search, sorting and filters

→

Chat
Replies, files, internal notes

→

Contact panel
Details, tags, fields, history



The Inbox in three columns: the conversation list, the open chat and the contact panel.

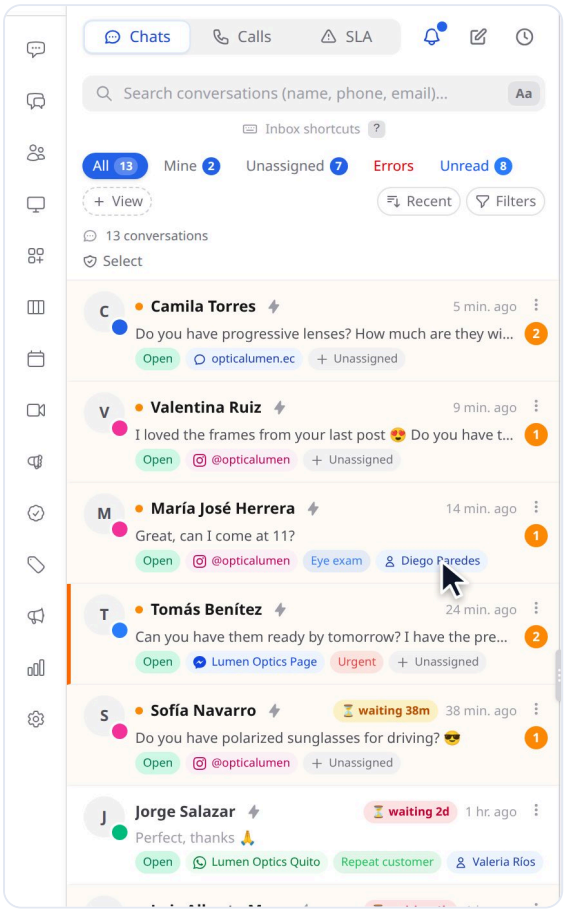
Area	What you find
List (left)	Every conversation in the workspace, with tabs, search, sorting and **Filters**.
Chat (center)	The history with the customer, the status, the assignment and the editor to reply or leave an **Internal note**.
Contact panel (right)	Contact details, channels, **Tags**, **Custom fields**, previous conversations and **View in CRM**.

02

CHAPTER 2

The conversation list

Each row tells you at a glance who wrote, from where, what they asked and whether someone is already on it.



A row in the list with all its details.

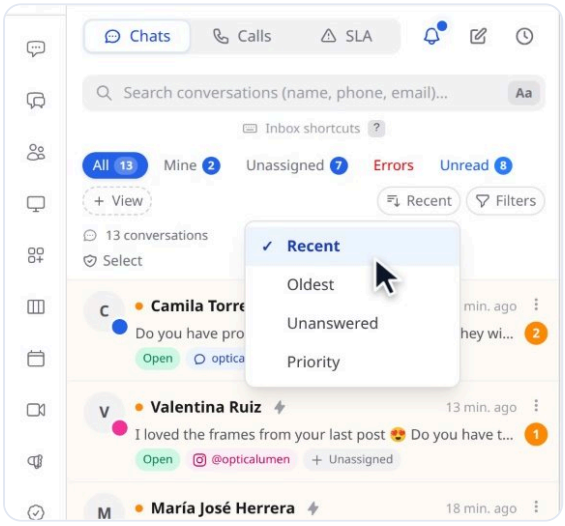
Each row shows the customer's name, their last message and how long ago it arrived. Below are color badges: the **status** (Open, Pending...), the **channel** they wrote from, their **tags** and the assigned person (or **Unassigned**). The orange circle counts unread messages and the **waiting** badge tells you how long the customer has gone without a reply.

Tabs

Tab	What it shows
All	Every conversation you can see in this workspace.
Mine	Only the ones assigned to you.
Unassigned	The ones nobody has picked up yet.
Unread	Combines with the selected tab and keeps only chats with unread messages. Tap it again to turn it off.
Errors	Conversations with messages that could not be delivered.

Search and sort

1. Type the customer's name, phone or email in the search box: the list filters as you type.
2. To see the full list again, clear the search box.
3. Tap **Recent** to change the order: **Recent**, **Oldest**, **Unanswered** (longest waiting first) or **Priority**.



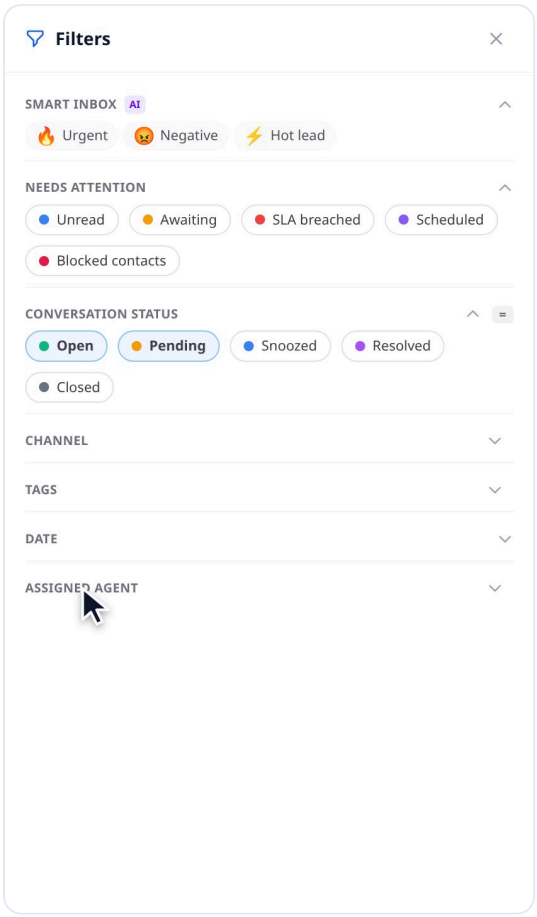
The list sorting menu.

03

CHAPTER 3

Filters and saved views

Combine status, channel, tags, date and agent to keep only what you need to handle.



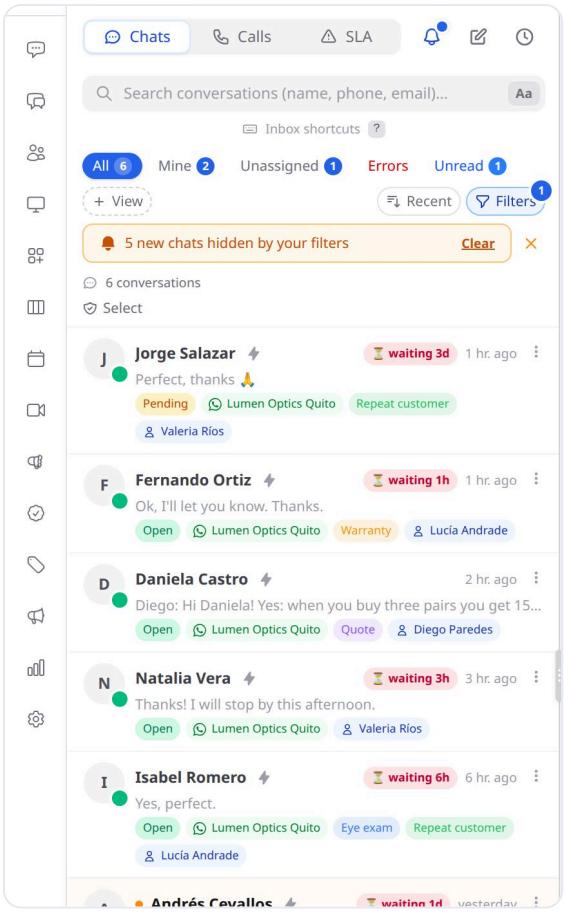
The Filters panel.

Tap **Filters**, above the list. The panel has these sections:

Section	What it is for
Smart Inbox	AI shortcuts: urgent chats, negative sentiment and customers with high purchase intent.
Needs attention	Unread, awaiting a reply, SLA breached, scheduled and blocked contacts.
Conversation status	Open, Pending, Snoozed, Resolved and Closed. By default you see open and pending ones.
Channel	By channel type (WhatsApp, Instagram, Messenger, Web chat) or a specific account.
Tags, **Date**, **Assigned agent**	To narrow it down even further.

1 Tap **Filters**.

2. Open **Channel** and choose **WhatsApp** (you can combine several sections).
3. Tap **Apply**: the list shows only those chats and the Filters button shows how many filters are active.
4. To remove them, open Filters again, tap **Clear filters** and then **Apply**.



The list filtered by the WhatsApp channel.

> **TIP**
>
> If you always use the same combination of filters, save it with the **View** button: it stays one click away, just for you.

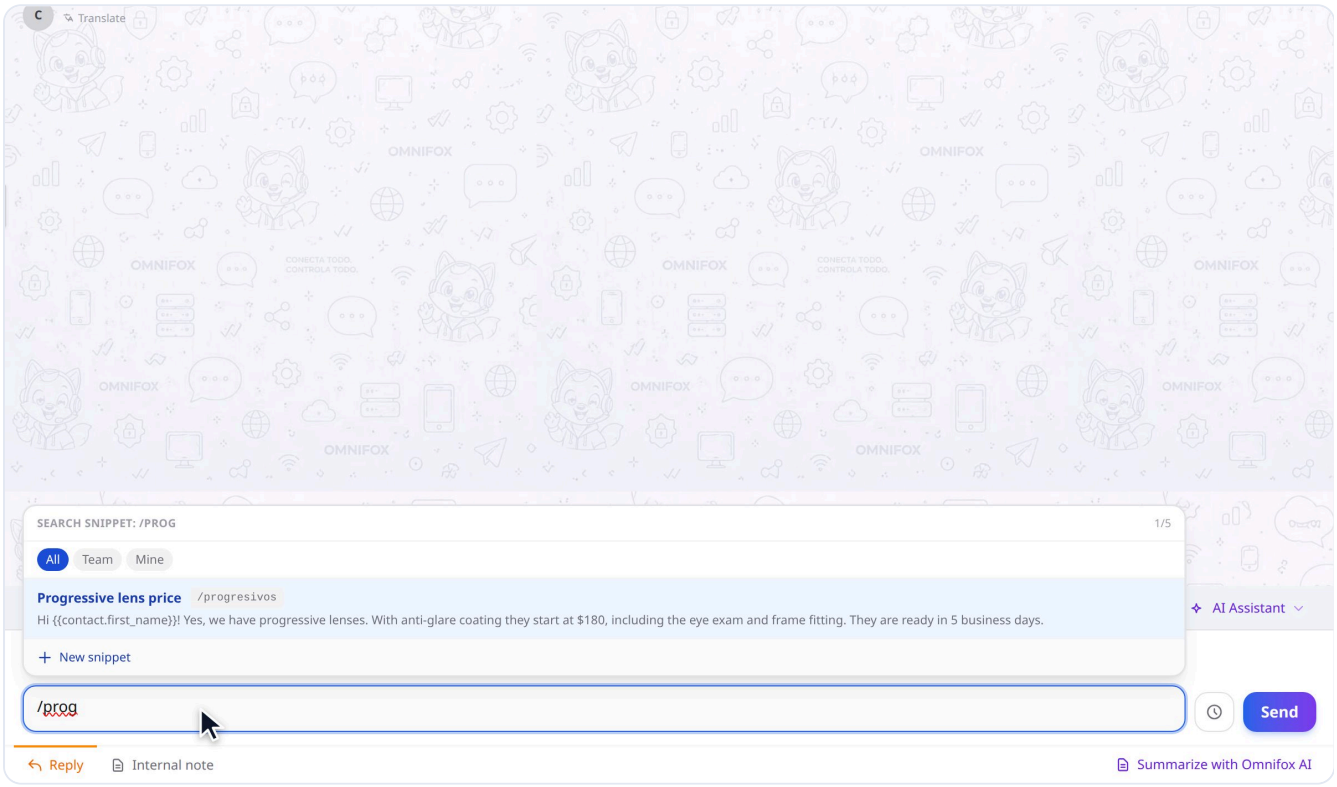
04

CHAPTER 4

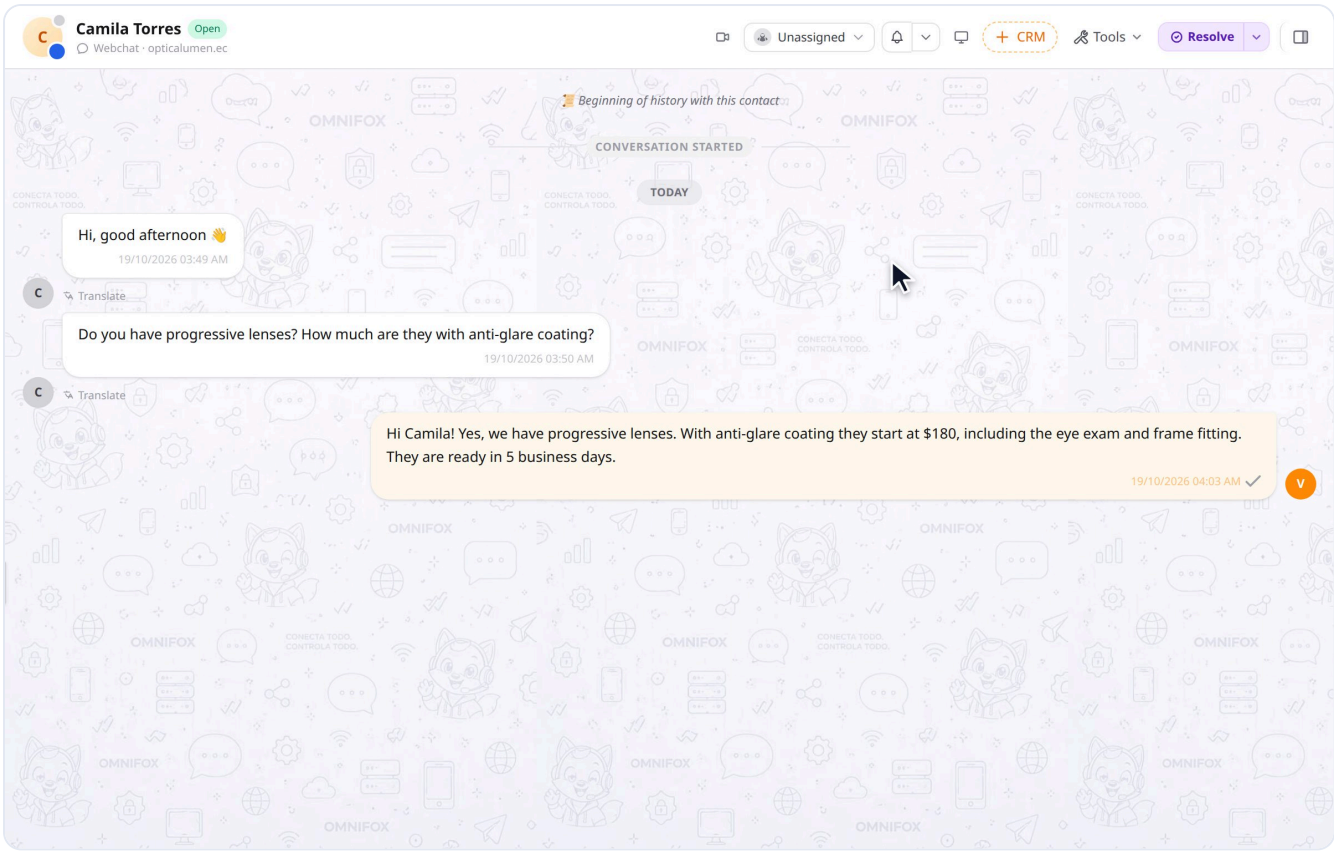
Reply with quick replies

Answer recurring questions in seconds, with the customer's name filled in automatically.

1. Open the conversation in the list.
2. In the editor, type a slash **/** and start typing: the matching quick replies appear.
3. Pick one with the mouse or with **Enter**. Variables such as **Name** show as a label and are replaced with the customer's data when you send.
4. Review the text, change it if needed and tap **Send**.



Typing /prog shows the quick reply “Progressive lens price”.



The reply sent, with Camila's name instead of the variable.

The picker has three tabs: **All**, **Team** and **Mine** (private ones). With **+ New snippet** you create a quick reply without leaving the chat. Available variables (contact name, your name, etc.) are inserted with the **$** button in the toolbar.

> **NOTE**
>
> The message always goes out through the same channel the customer wrote from: the one shown in the grey line above the editor.

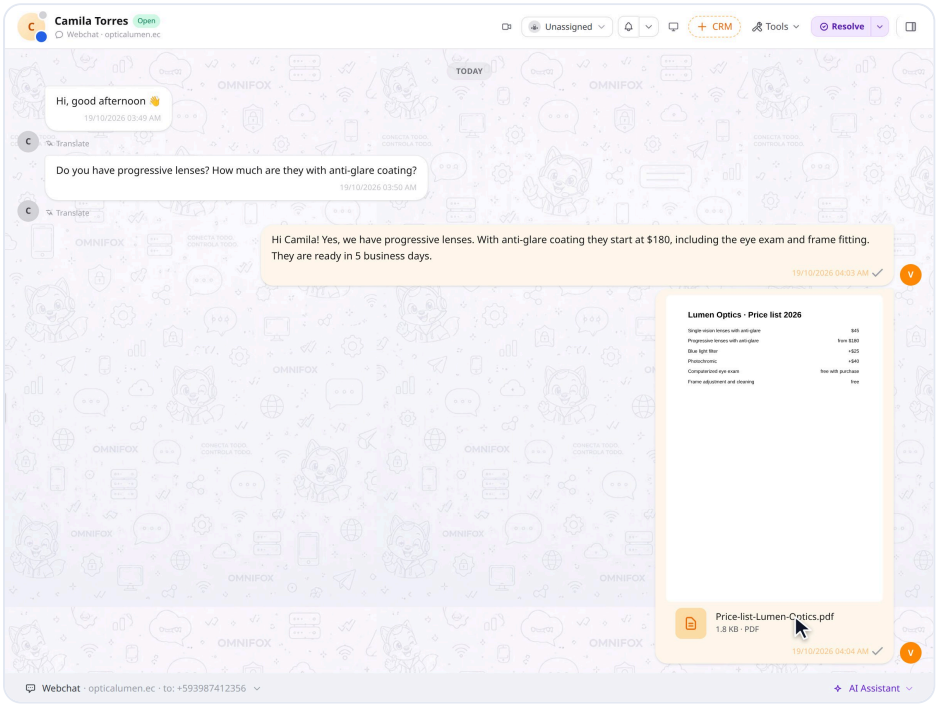
05

CHAPTER 5

Files, emojis and scheduled messages

Files, images, GIFs, voice notes, catalog products and messages for later.

1. Tap the paperclip (**Attach file**) and choose the file.
2. It appears above the editor, ready to send. You can remove it with the ×.
3. Tap **Send attachments**.



The price list sent as a PDF inside the chat.

Toolbar button	What it is for
Emoji	Insert emojis (also by typing a colon **:**).
Image	Send photos with a preview.
GIF	Search and send a GIF.
Microphone	Record and send a voice note.
$	Insert contact or agent variables.
Cart	Send a product from your catalog.
Clock (next to Send)	**Schedule send**: the message goes out on its own at the date and time you choose.

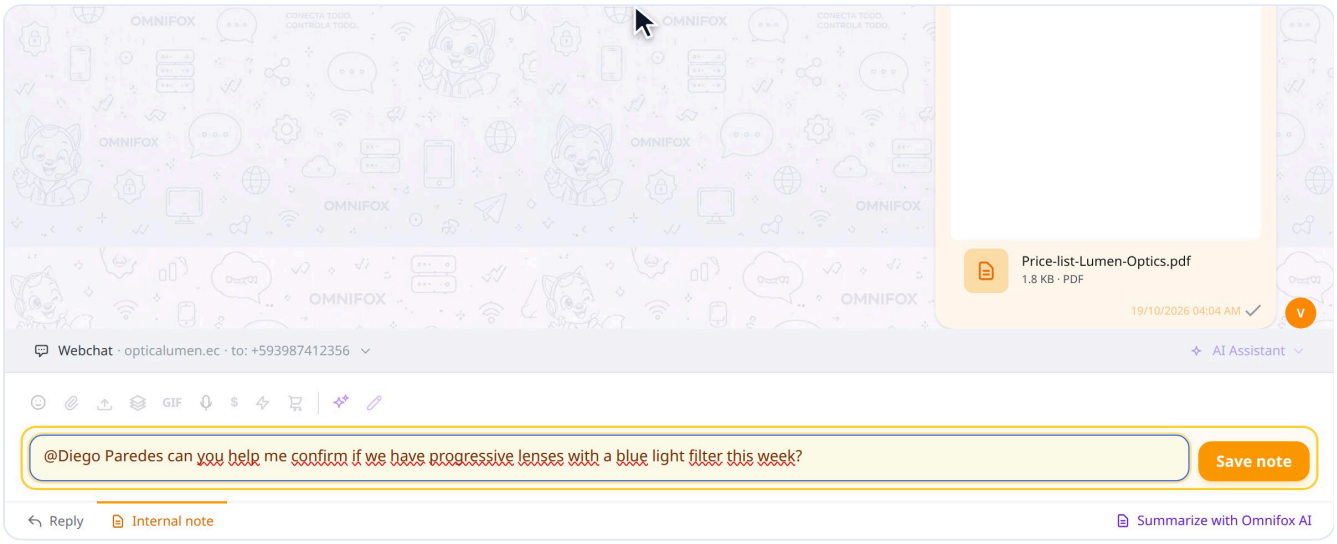
06

CHAPTER 6

Internal notes and mentions

Talk to your team inside the conversation without the customer seeing it.

1. Below the editor, switch to **Internal note**: the editor turns yellow.
2. Type **@** and a teammate's name and pick them from the list to mention them; they get a notification and land right in this chat.
3. Tap **Save note**.
4. Switch back to **Reply** to write to the customer again.



An internal note mentioning Diego, before saving it.

> **NOTE**
>
> Internal notes are never sent to the customer, on any channel. They stay in yellow in the history so the whole team has the context.

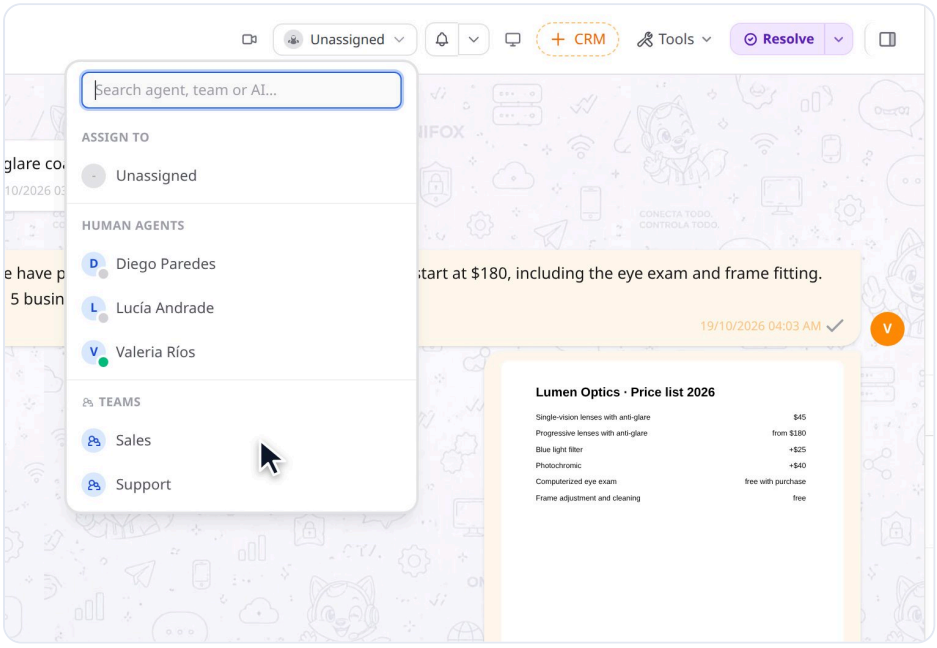
07

CHAPTER 7

Assign to a person or a team

Give every chat an owner and let every agent see their own.

1. In the chat header, tap **Unassigned** (or the name of whoever has it).
2. Search or pick the person under **Human agents**, or a team under **Teams**.
3. The change shows up instantly in the list and is recorded in the chat history.



The assignment picker: people and teams.

Each agent finds their conversations in the **Mine** tab. If you assign to a team, such as Sales or Support, Omnifox can distribute the conversations among its members according to the rule set for that team.

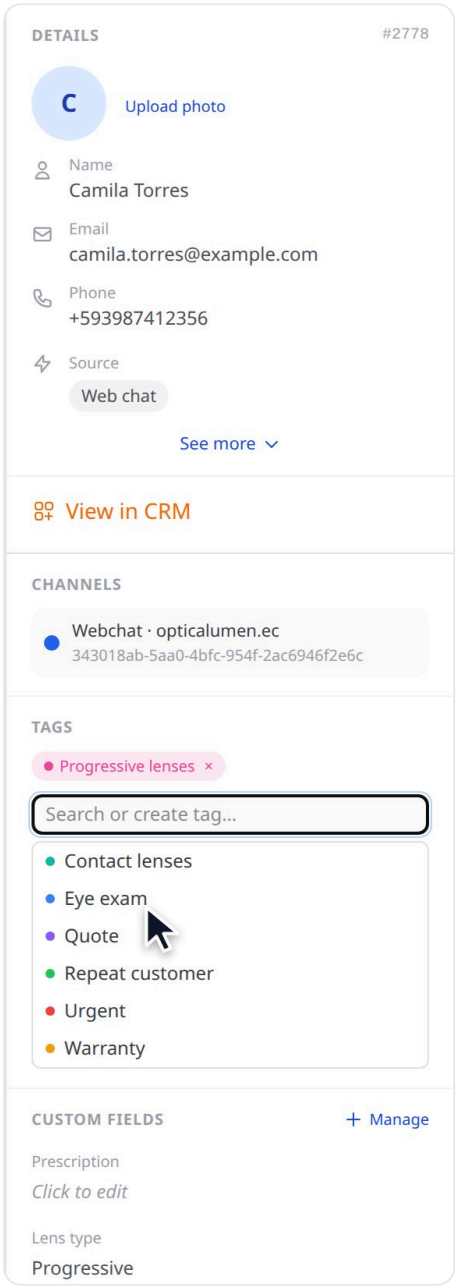
08

CHAPTER 8

Tags

Organize your conversations by topic, customer type or stage.

1. In the contact panel, tap **+ Add tag**.
2. Pick a tag from the list or type a new one to create it.
3. To remove it, tap the × on the tag.



Adding a tag from the contact panel.

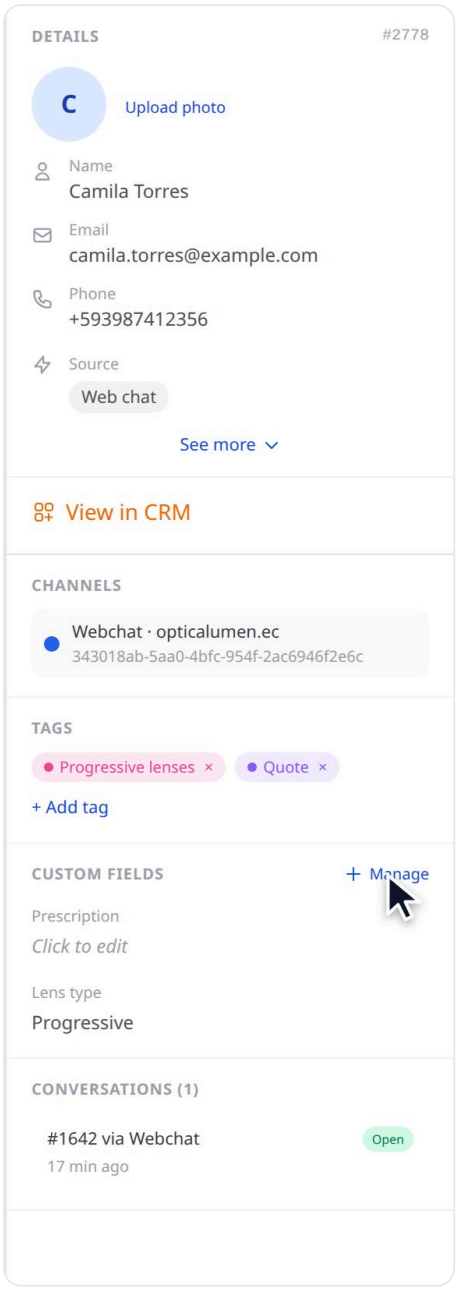
Tags show in the list row, can be used in **Filters** and can be applied to several conversations at once with **Select → Tag**.

09

CHAPTER 9

The contact panel

Everything you know about the customer, right next to the conversation.



The contact panel: tags, custom fields and conversations.

Block	What it contains
Details	Name, email, phone and source. Any field is edited with a click; **Show more** shows company, job title, city, country and language.
View in CRM	Opens the contact's full record in the CRM, with deals and activity.
Channels	The channels this contact has written to you from.
Tags	The tags on this conversation.
Custom fields	Data specific to your business (in the example, Prescription and Lens type). **Manage** creates new fields.
Conversations	The history of previous conversations with this contact.

1. In **Custom fields**, tap **Click to edit** under the field.
2. Type the value and press **Enter** (or leave the field): it saves automatically.

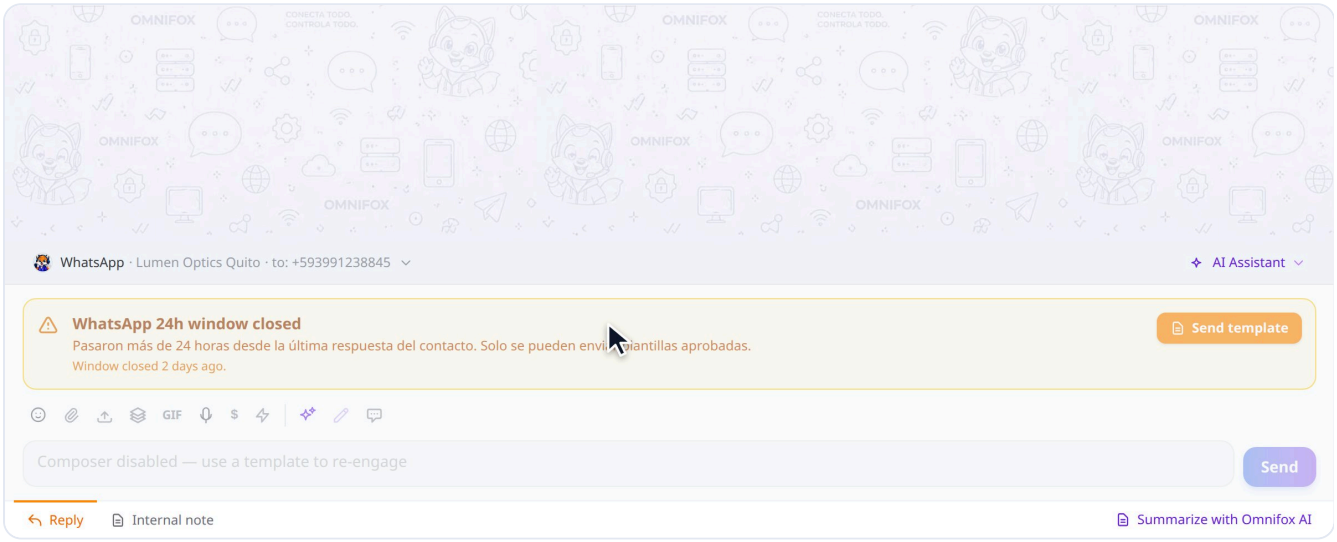
10

CHAPTER 10

WhatsApp templates and the 24-hour window

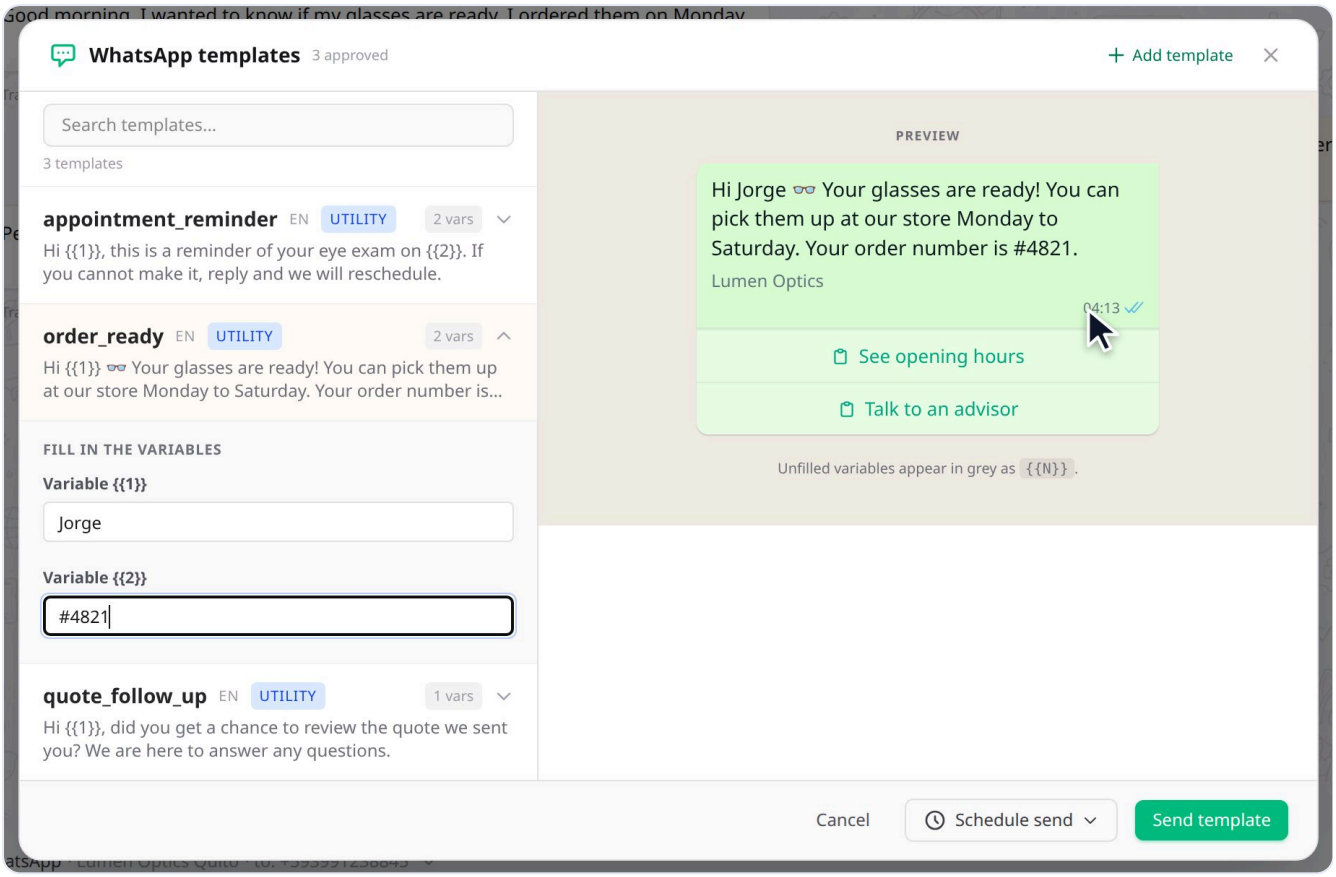
How to message a WhatsApp customer who hasn't written to you in the last 24 hours.

WhatsApp only allows free-form messages during the 24 hours after the customer's last message. After that, the window closes: the editor is locked and you can only write with a **template approved by Meta**. When the customer replies, the window opens again.



Closed-window notice in a WhatsApp conversation.

1. Tap **Send template** in the yellow notice.
2. Search and pick the template (in the example, **order_ready**).
3. Fill in the variables (**{{{{1}}}}**, **{{{{2}}}}**...). On the right you see the preview exactly as the customer will get it.
4. Tap **Send template**, or use **Schedule send** to send it later.



The template picker with the variables filled in and the preview.

> **HEADS UP**
>
> Templates are created and submitted to Meta for approval from **Add template** (it opens the channel settings). Only approved templates appear in the picker.

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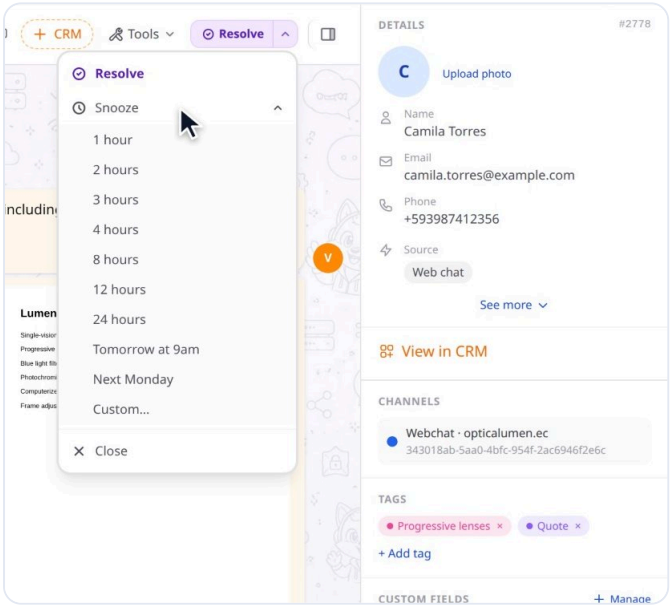
CHAPTER 11

Resolve, snooze, close and bulk actions

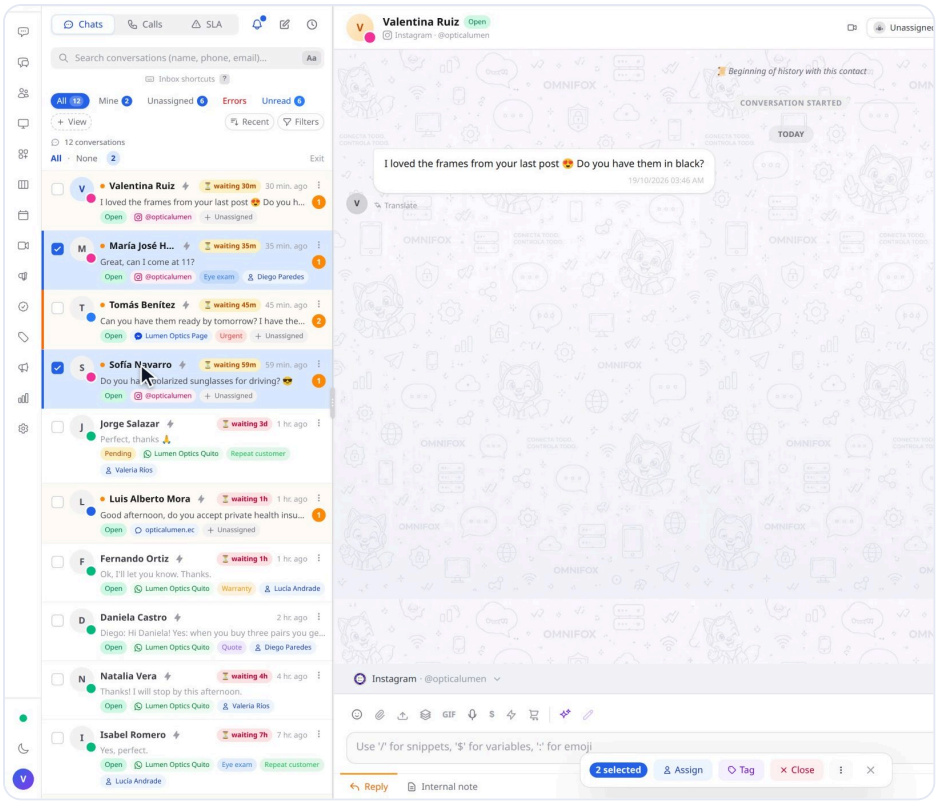
Keep your Inbox up to date: every conversation in its status.

Status	What it means
Open	Active: someone on the team needs to handle it.
Pending	We owe the customer a reply. Omnifox sets it automatically if they wait more than 24 hours.
Snoozed	Set aside until a time or date; it goes back to Open on its own, or earlier if the customer writes.
Resolved	Already handled. If the customer writes again, it reopens on its own.
Closed	Finished.

1. To resolve, tap **Resolve** in the chat header: the conversation leaves the open list and the next one opens.
2. To snooze or close, tap the arrow next to Resolve and choose **Snooze** (1 hour, several hours, tomorrow at 9am, next Monday or a custom date) or **Close**.



The arrow next to Resolve: Snooze (with its time options) and Close.



Bulk actions: two conversations selected and the bottom bar.

Bulk actions

1. Tap **Select**, above the list.
2. Check the conversations.
3. In the bottom bar choose **Assign**, **Tag** or **Close** (more options under ⋮).
4. Tap **Exit** to go back to the normal list.

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CHAPTER 12

AI summary and keyboard shortcuts

Save time with AI and the keyboard.

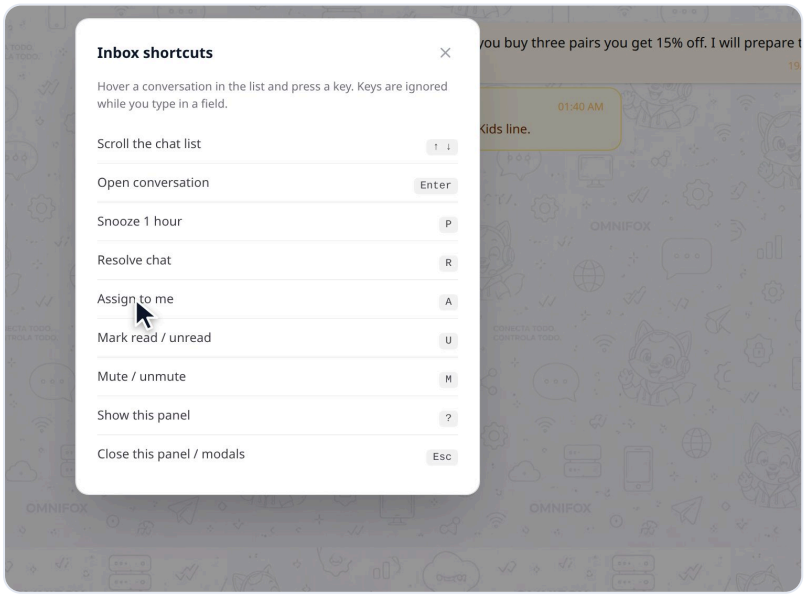
Summary with Omnifox AI

Below the editor, **Summarize with Omnifox AI** reads the conversation and in seconds gives you the summary, the customer's sentiment and suggested actions. You can copy it or **Pin as internal note** so the whole team sees it.

Keyboard shortcuts

Hover over a chat in the list and press a key. Keys don't act while you are typing in a field.

Key	Action
↑ ↓	Move through the list
Enter	Open the conversation
P	Snooze 1 hour
R	Resolve
A	Assign to me
U	Mark as read or unread
M	Mute or unmute
?	Show the shortcuts help
Esc	Close panels



The Inbox shortcuts help.

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CHAPTER 13

Frequently asked questions

Why can't I write to a WhatsApp customer?

Because more than 24 hours have passed since their last message. Use **Send template** (chapter 10).

Can the customer see internal notes?

No. Only your team sees them, in yellow, inside Omnifox.

What happens if two people open the same chat?

Both see it in real time. To avoid double replies, assign it to one person (chapter 7).

Where is a conversation I resolved?

In **Filters** → **Conversation status**, check **Resolved** and apply. It also appears in the contact panel, under **Conversations**.

Can I reply from my phone?

Yes, from the Omnifox app for agents or from your phone's browser.

Do quick replies work on every channel?

Yes. Variables are replaced with the contact's data on WhatsApp, Instagram, Messenger and web chat.

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**.