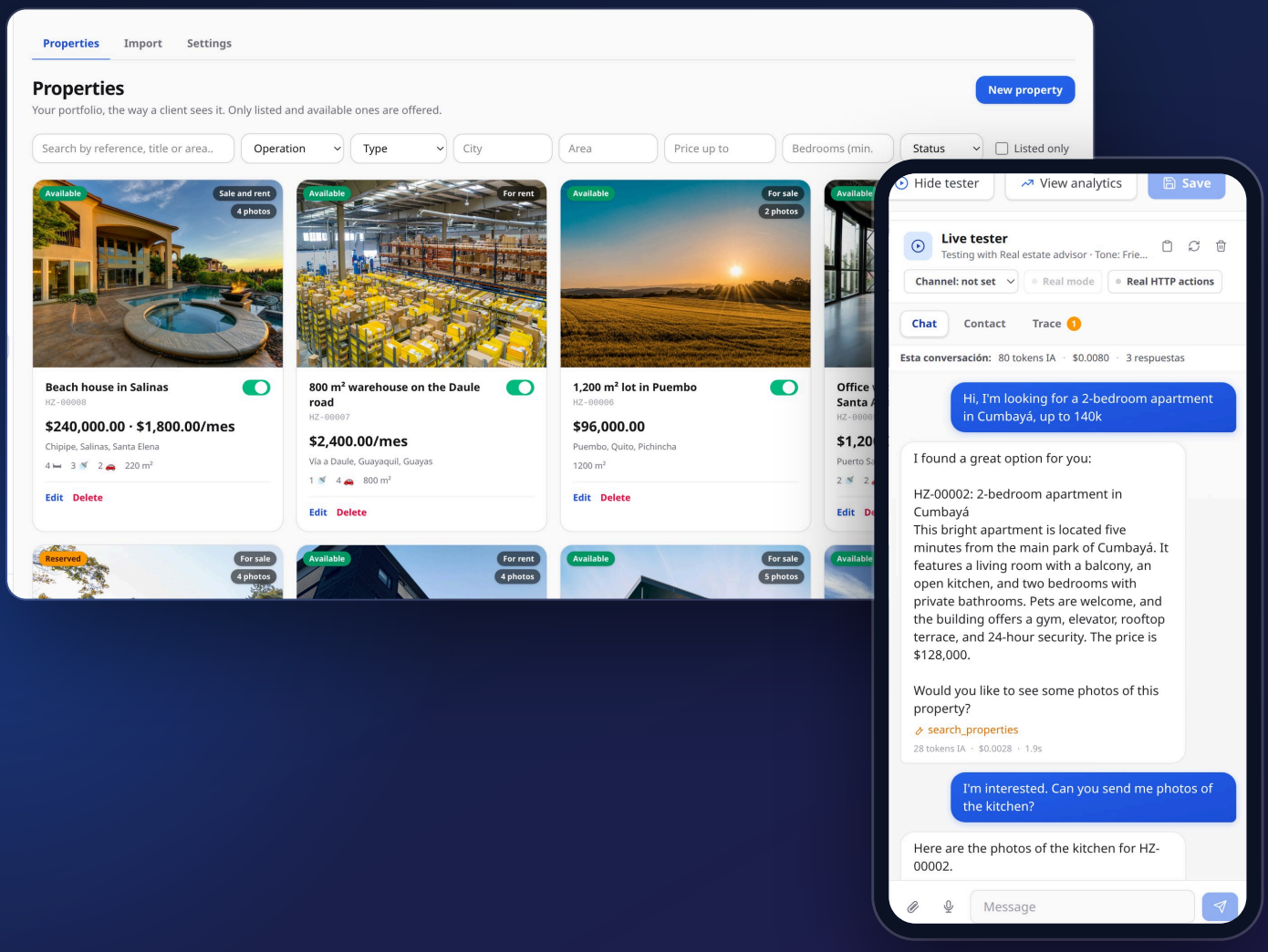
Omnifox

MODULE MANUAL

Real estate

Your property portfolio in Omnifox: sales, rentals, off-plan projects and land, with photos by room, watermark, spreadsheet import and an AI agent that searches properties, sends the photos and books viewings over chat.



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How to read this manual

The screenshots are real Omnifox screens with a fictional agency, **Horizonte Propiedades**, with ten properties in Ecuador: houses, apartments, an office, a warehouse, a lot and an off-plan model home. The orange numbered circles (1) point to what is explained under each image.

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

01

CHAPTER 1

What Real Estate is and who it is for

A Catalog module for agencies selling resale homes, rental managers, developers with off-plan projects and anyone selling land.

Real Estate keeps your portfolio inside Omnifox, right where leads arrive from WhatsApp, Instagram, Messenger and your website chat. Your team and the AI agent work with the same data: what is available, at what price, what each room looks like and when it can be visited.

Settings
Currency, viewings, public price and watermark

→

Properties
One by one or imported from a spreadsheet

→

Photos by room
Cover, living room, kitchen, bathroom...

→

AI agent
Searches, sends photos, books viewings

Listing type	What it is for
For sale	Sale price. If left empty, the listing says **Price on request**.
For rent	Monthly rent and, if any, the HOA/maintenance fee.
Sale and rent	Both: shows the sale price and the monthly rent.

02

CHAPTER 2

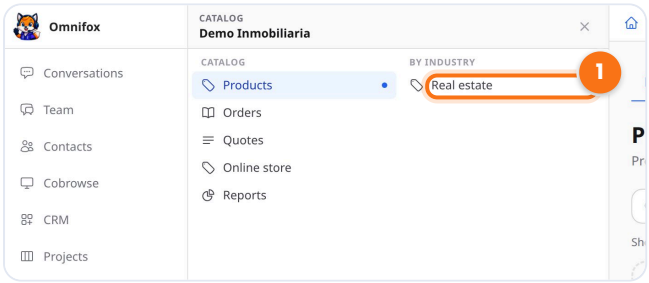
Turn on the module

It is enabled per workspace, for free, in one click. Only the account owner or an admin can do it.

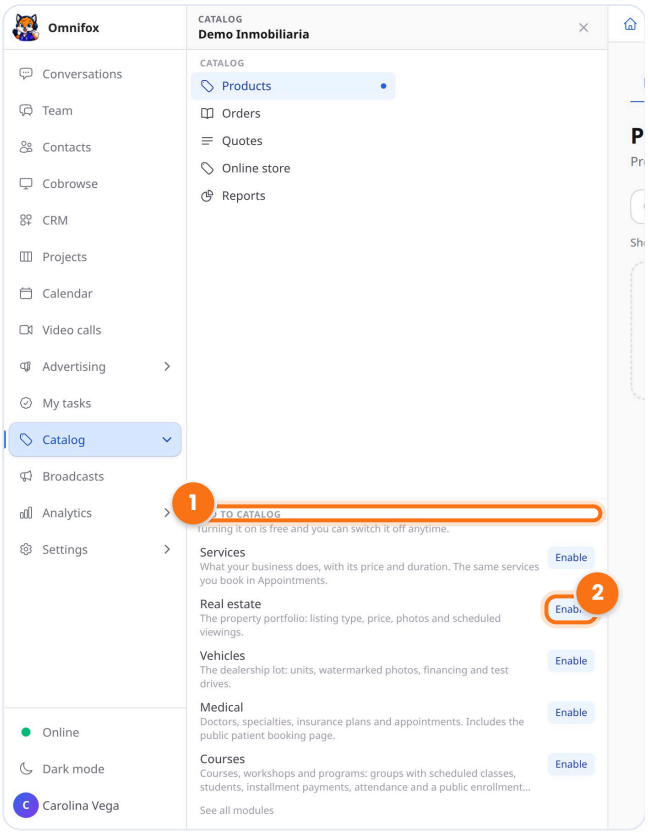
1. In the sidebar, open **Catalog**.
2. At the bottom of the panel, under **Add to catalog**, find **Real estate**.
3. Click **Enable**. The module shows up right away under **By industry**.
4. Open it: you will see three tabs, **Properties**, **Import** and **Settings**.

NOTE

To turn it off, go to **See all modules** at the bottom of the panel. Turning it off deletes nothing: your properties are still there when you turn it back on. An AI agent that already has the tools enabled keeps answering even if the module is off in the menu.



Once enabled, it appears in the by-industry group.



The **Catalog** panel, with the modules you don't use yet at the bottom.

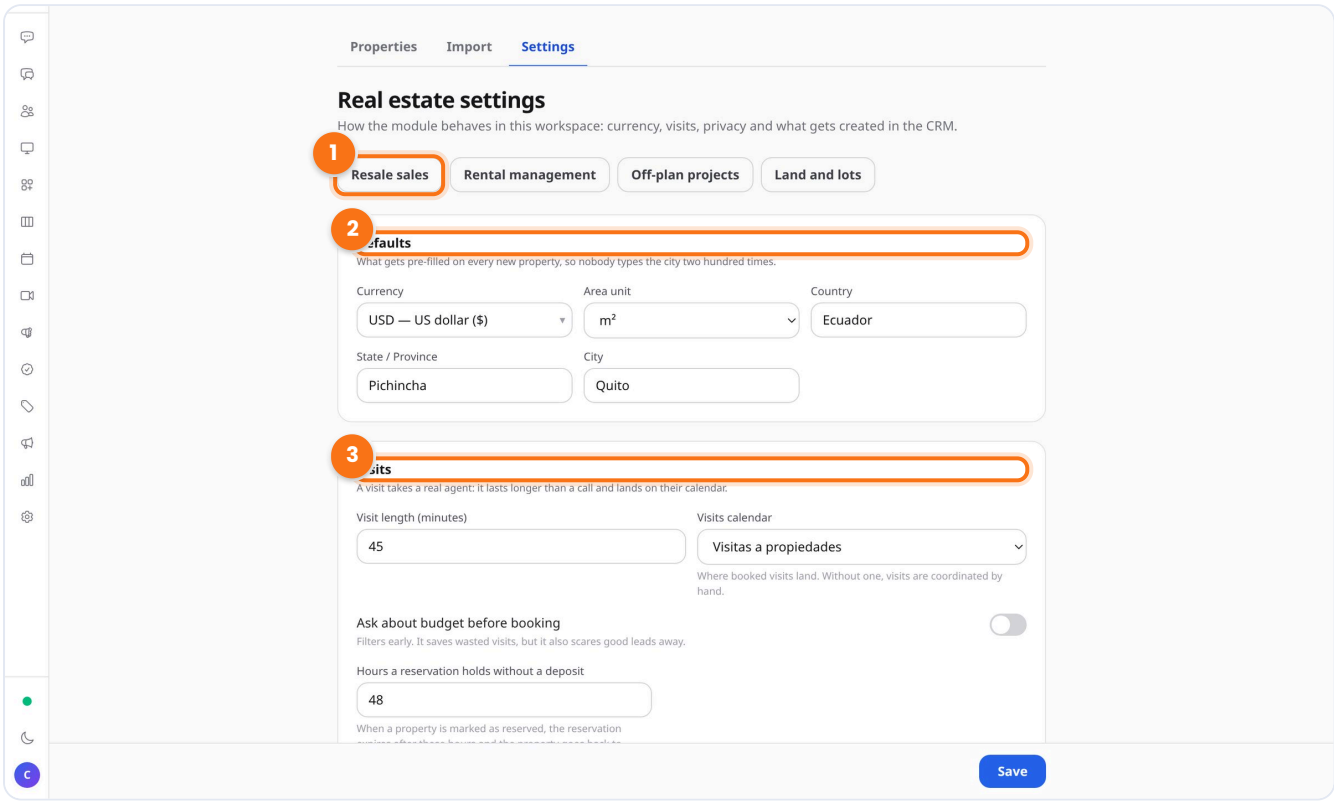
1. **Add to catalog**
2. **Enable** next to **Real estate**.

03

CHAPTER 3

Module settings

Before adding properties, tailor the module to your agency. Everything can be changed later.



Real estate settings: shortcuts by type of agency, default values and viewings.

1. Shortcuts by type of agency.
2. **Defaults**
3. **Visits**

Shortcuts by type of agency

They fill in the settings with sensible values. You are asked to confirm, and they never touch the code counter.

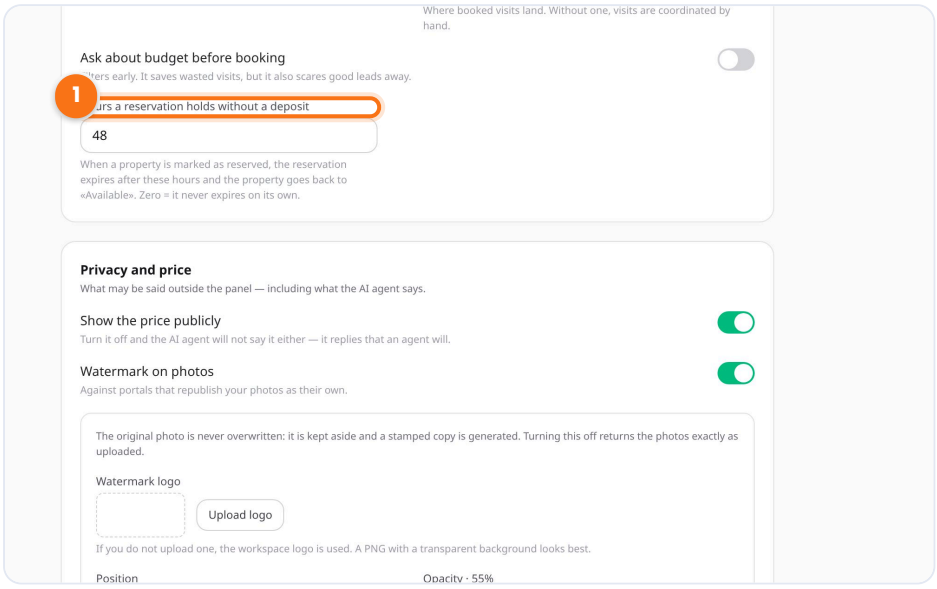
Shortcut	Viewing	Public price	Budget before booking	Watermark	Prefix
Resale sales	45 min	Yes	No	Yes	`PROP-`
Rental management	30 min	Yes	No	No	`ARR-`
Off-plan projects	60 min	No	Yes	Yes	`UNI-`
Land and lots	60 min	Yes	Yes	No	`LOT-`

Defaults

Currency, **Area unit**, **Country**, **State / Province** and **City** are filled in automatically on every new property that leaves them empty.

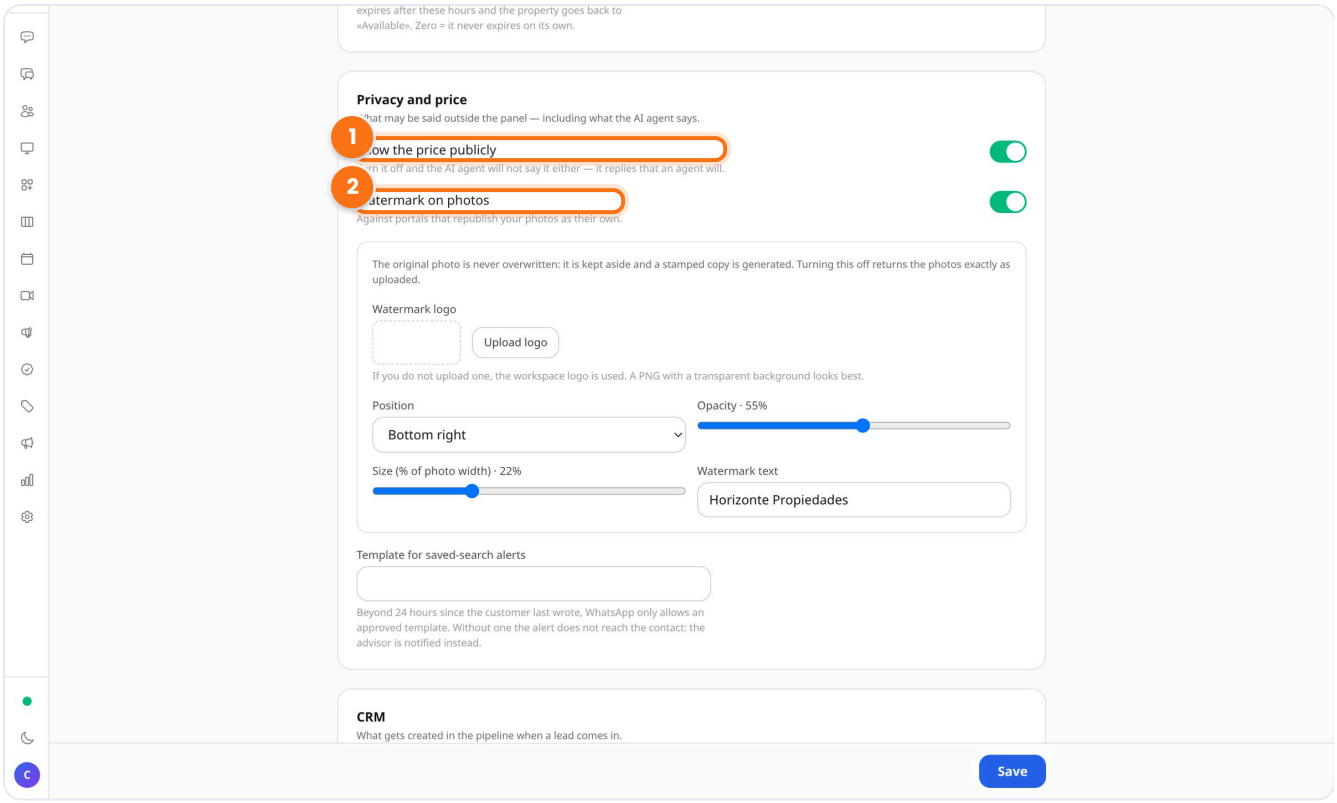
Visits

- **Visit length (minutes)**: how long a viewing takes in the advisor's calendar.
- **Visits calendar**: where viewings land. **That calendar needs business hours** (Calendar → edit calendar): without them, the AI agent won't book and hands over to a person instead of making up a time slot.
- **Ask about budget before booking**: the agent asks for the budget before booking.
- **Hours a reservation holds without a deposit**: when you mark a property as **Reserved**, the reservation expires after those hours and the property goes back to **Available** on its own (a process checks every hour). With **0** it never expires. It only counts from the moment the property *becomes* reserved.



Hours a reservation holds without a deposit: 48 hours in the demo.

1 **Hours a reservation holds without a deposit**



Privacy and price, with the watermark turned on.

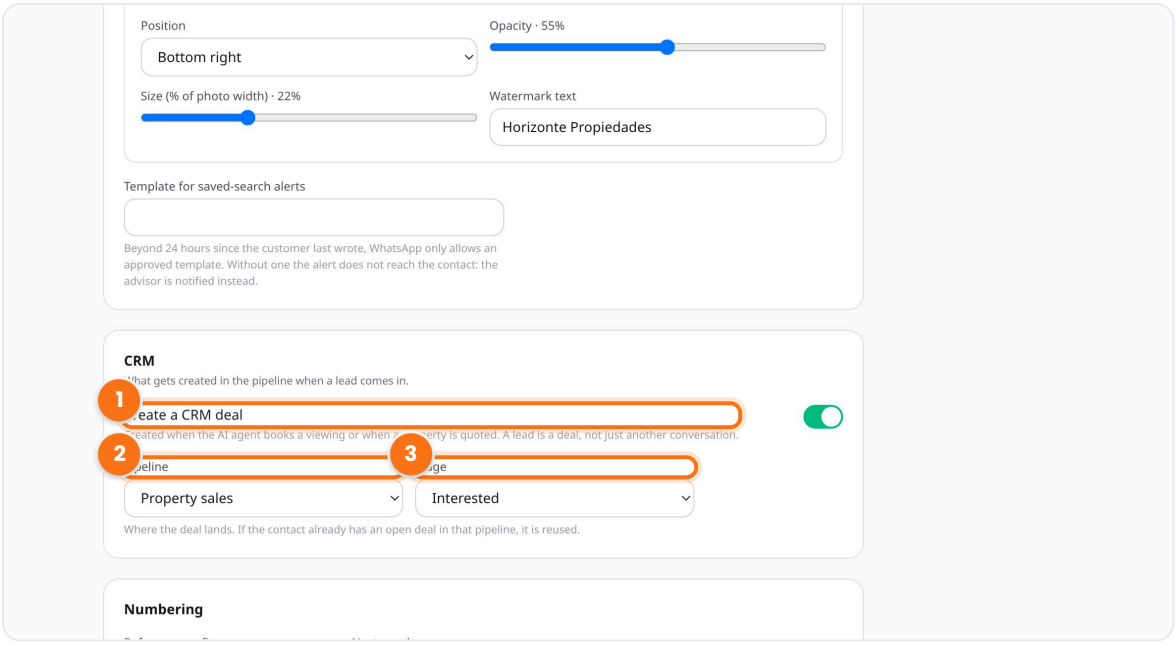
1 **Show the price publicly**

2 **Watermark on photos**

Privacy and price

Show the price publicly: if you turn it off, the AI agent won't say the price either and answers that it must be checked with an advisor; it won't build quotes with that price. Your team can still quote from the panel. The watermark is covered in chapter 6.

CRM



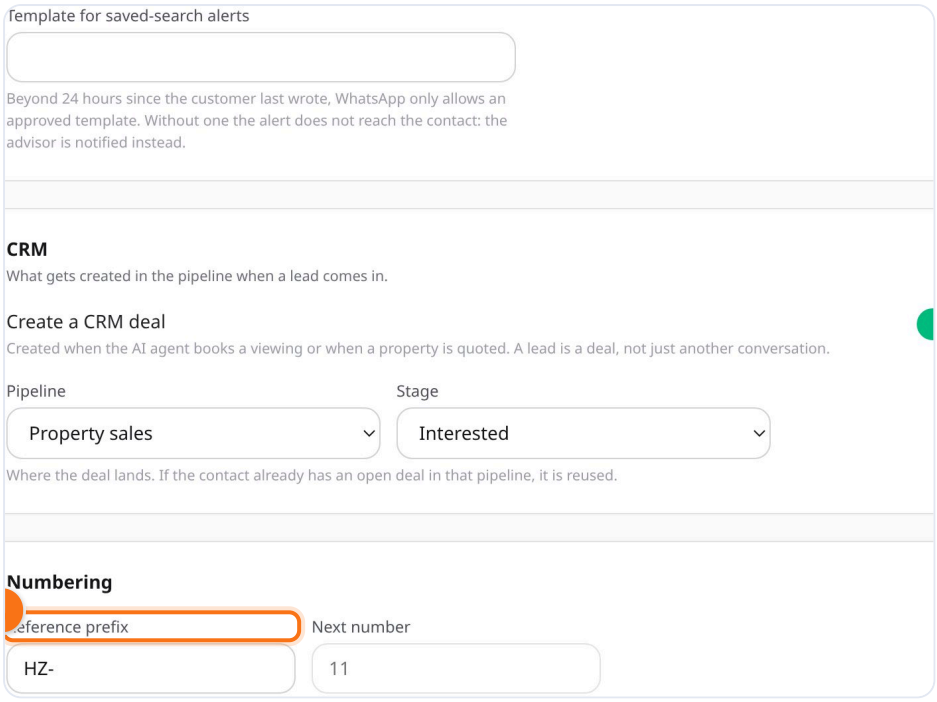
Create a CRM deal with its pipeline and stage.

1. **Create a CRM deal**
2. **Pipeline**
3. **Stage**

With **Create a CRM deal** on, every lead lands in your sales pipeline as a deal on its own:

- **When a property is quoted** (from the panel or by the AI agent): the deal carries the quote number and amount, and is linked to it. If the quote is accepted, the deal is marked won.
- **When the AI agent books a viewing**: the deal is named "Visita: ..." (Viewing) with the property price.

In **Pipeline** and **Stage** you pick where it lands, from a list. If you leave them on "The default pipeline" and "The first stage", those are used. If the contact already has an **open** deal in that pipeline, it is reused: no duplicate, and its stage is not changed. If the workspace has no pipeline at all, nothing is created.



Numbering: the code prefix. The next number cannot be edited by hand.

1 **Reference prefix**

TIP

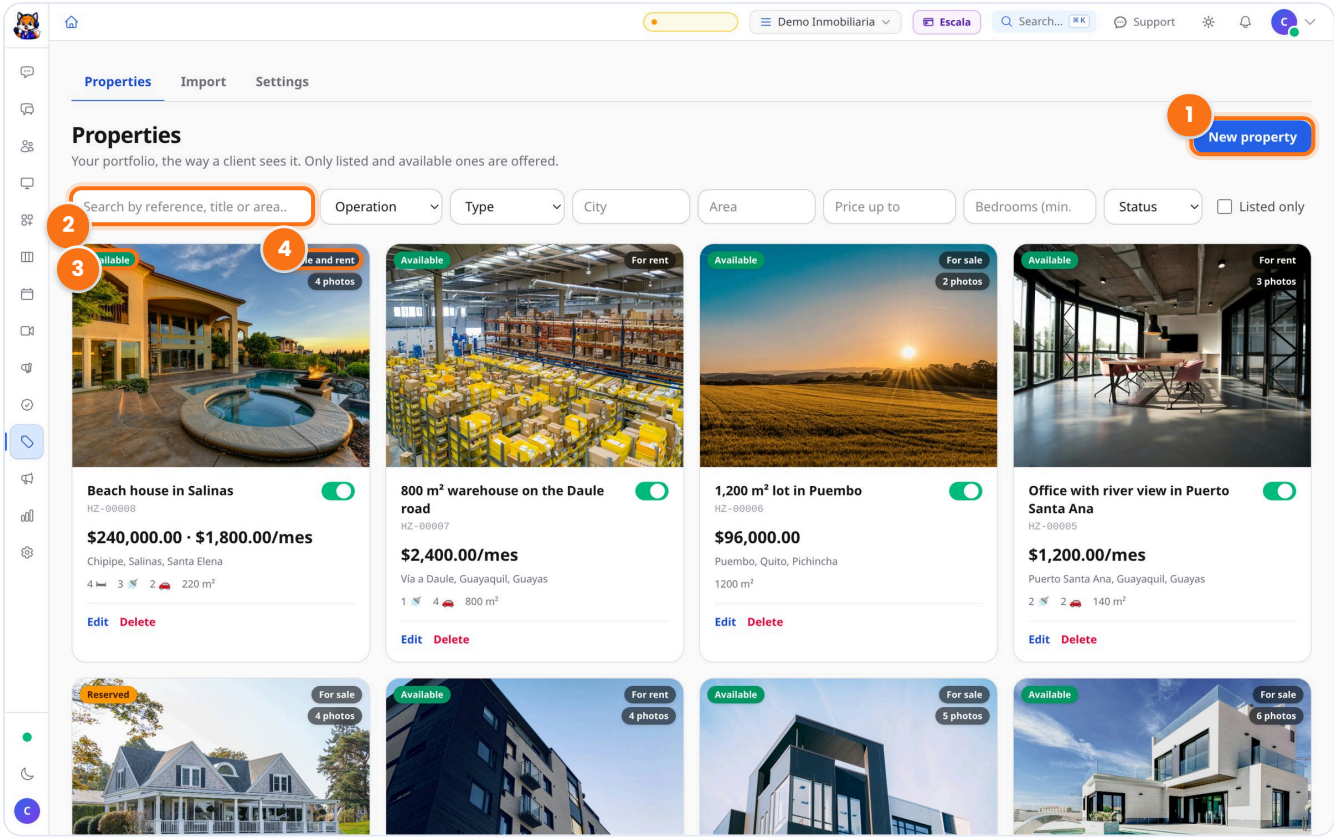
Settings are saved by the owner or an admin. Other roles see them read-only. When done, click **Save**.

04

CHAPTER 4

The portfolio: statuses and filters

The Properties tab shows your portfolio as a gallery: photo, status and price first.

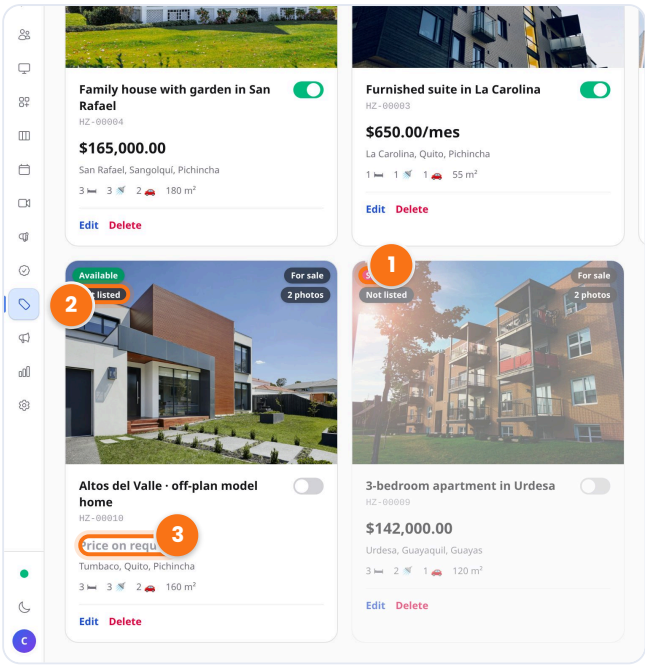


The Horizonte Propiedades portfolio.

1. **New property**
2. Search by code, title or neighborhood, and filters.
3. Status, on top of the photo.
4. Listing type and number of photos.
5. Switch to publish or unpublish.

Statuses

Status	What it means
Available	Can be offered. It is the only thing the AI agent offers (if it is also published).
Reserved	Someone is seriously interested. Not offered.
Sold / Rented	Closed. **It is unpublished automatically** when saved and looks faded.
Inactive	Paused: stays in the portfolio without being offered.



A sold one, faded, and an unpublished model home with no price.

1. **Sold**
2. **Not listed**
3. **Price on request**

Filters

They are a buyer's real questions: **Operation**, **Type**, **City**, **Area**, **Price up to**, **Bedrooms (min.)**, **Status** and **Listed only**. They combine; **Clear filters** removes them all.

> **HEADS UP**
>
> The AI agent only offers **published and available** properties. A new property starts unpublished: publish it when it is ready, with its photos.

05

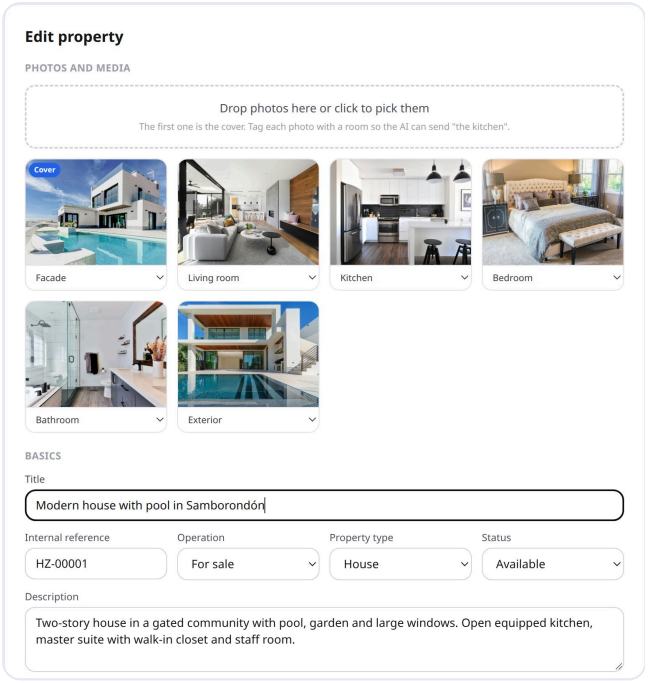
CHAPTER 5

Add a property

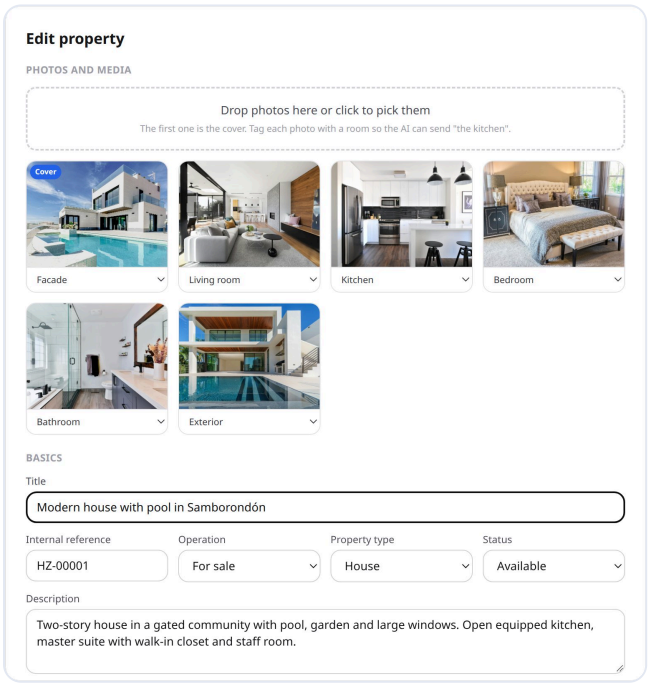
Each property is a listing with its details, location and photos.

1. In **Properties**, click **New property**.
2. **Basics**: **Title**, **Operation**, **Property type**, **Status** and **Description**. The **Internal reference** is generated automatically.
3. **Price**: **Sale price** or **Monthly rent** depending on the listing type, **Currency** and **Monthly HOA fee**.
4. **Features**: bedrooms, bathrooms, parking, areas, floor and **Amenities** separated by commas.
5. **Location**: city, **Area** and **Exact address**.
6. Upload the photos (chapter 6), tick **Listed** and click **Save**.

> **NOTE**
>
> An empty price is not zero: the listing says **Price on request** and the AI agent won't make one up.



Price and **Features** of a house for sale.

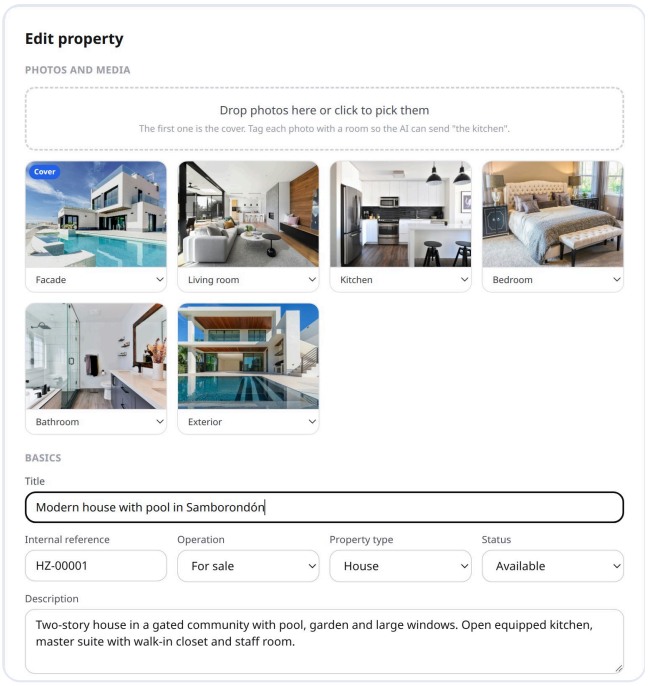


Location

1. **Do not publish the exact address**

The exact address

Do not publish the exact address is ticked by default. The neighborhood and city are shown; the street stays with your team and the viewing appointment. **The AI agent never receives the exact address**, so it cannot say it: when it books, it answers that the advisor will confirm the meeting point.



Listing

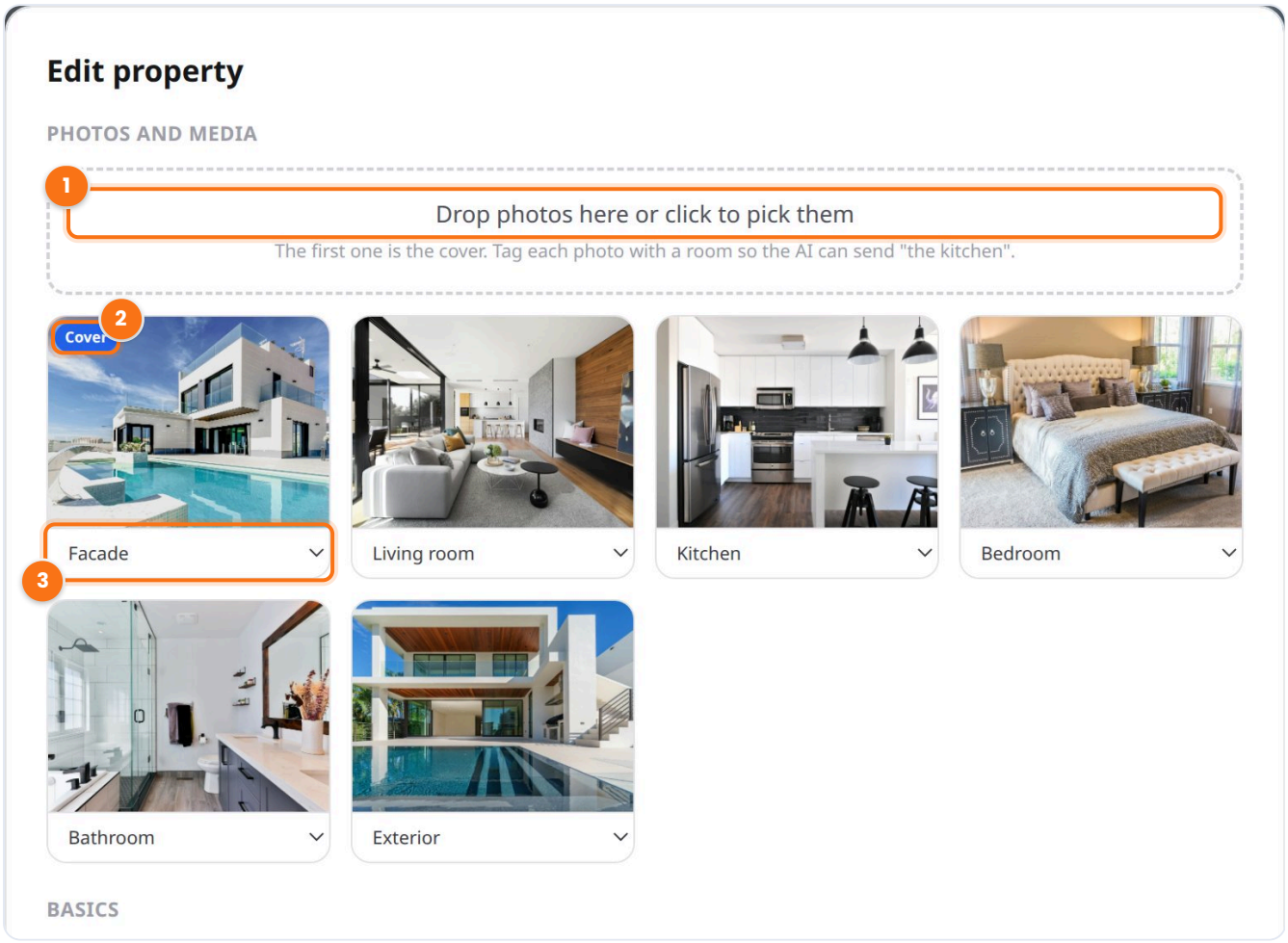
1 Listed

06

CHAPTER 6

Photos by room and watermark

A property sells through its photos. That is why each photo has a room.



Photos and media in the property editor.

1. Drag in or pick several photos at once.
2. **Cover**: the first photo.
3. The room of each photo.

Upload and arrange

- You can upload photos before saving: if the property is new, it is saved automatically with the first photo (it needs a title).
- The first one is the **Cover**: the one shown in the gallery and the first one the AI sends. To change it, use **Use as cover** on another photo.
- Photos are resized to a light size for chat, without losing sharpness.

Rooms

Under each photo you choose the room: Facade, Living room, Dining room, Kitchen, Bedroom, Bathroom, Study, Terrace, Garden, Parking, View, Exterior, Common areas, Floor plan.

When a customer asks "what's the kitchen like?", the agent sends only the kitchen photos, up to six at a time.

Watermark

In **Settings** → **Privacy and price**, turn on **Watermark on photos** so your photos are not republished on other listing sites as someone else's. It can use your logo (**Watermark logo**, a transparent PNG works best) or a text (**Watermark text**), and you choose **Position**, **Opacity** and size.

> **TIP**
>
> The original photo is never overwritten: it is stored separately and a copy with the mark is generated. If you turn the mark off, photos go back to how they were uploaded. When you change the mark, photos are regenerated in the background within moments.

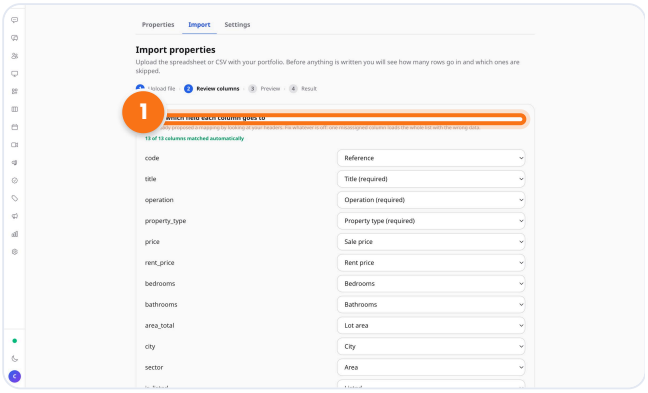
07

CHAPTER 7

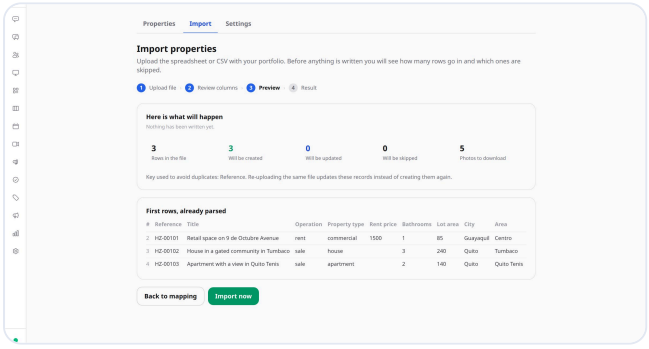
Import your portfolio from a spreadsheet

An agency with two hundred properties does not add them one by one.

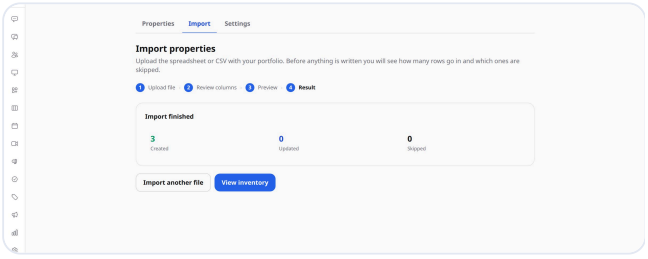
1. Open the **Import** tab. If you don't know which columns to use, click **Download sample template**.
2. Upload your CSV, XLSX or ODS file (up to 20 MB).
3. In **Review columns**, check which field each column goes to; recognized columns are already assigned.
4. If your file has photo links, tick **Download photos that come in as URLs**.
5. **See preview**: the **Preview** shows how many will be created, updated or skipped, without writing anything.
6. Click **Import now** and check the **Result**.



Review columns



Preview



Result

Column (header examples)	Notes
`code`, `reference`	The key: if the code already exists, the property **is updated** instead of duplicated.
`title` (required)	
`operation` (required)	sale, rent, both (Spanish words also work)
`property_type` (required)	house, apartment, land, office, commercial, warehouse
`price`, `rent_price`, `expenses`	Understands 185,000.00 and 185.000,00.
`bedrooms`, `bathrooms`, `parking`, `area_total`	
`city`, `sector`, `address`	
`is_listed`	yes / no
`photos`	Links separated by `|`, up to 10 per listing. Downloaded in the background.

08

CHAPTER 8

Set up the AI agent

An AI agent answers your leads on WhatsApp, Instagram, Messenger or your website chat: it searches your portfolio, sends the photos and books the viewing.

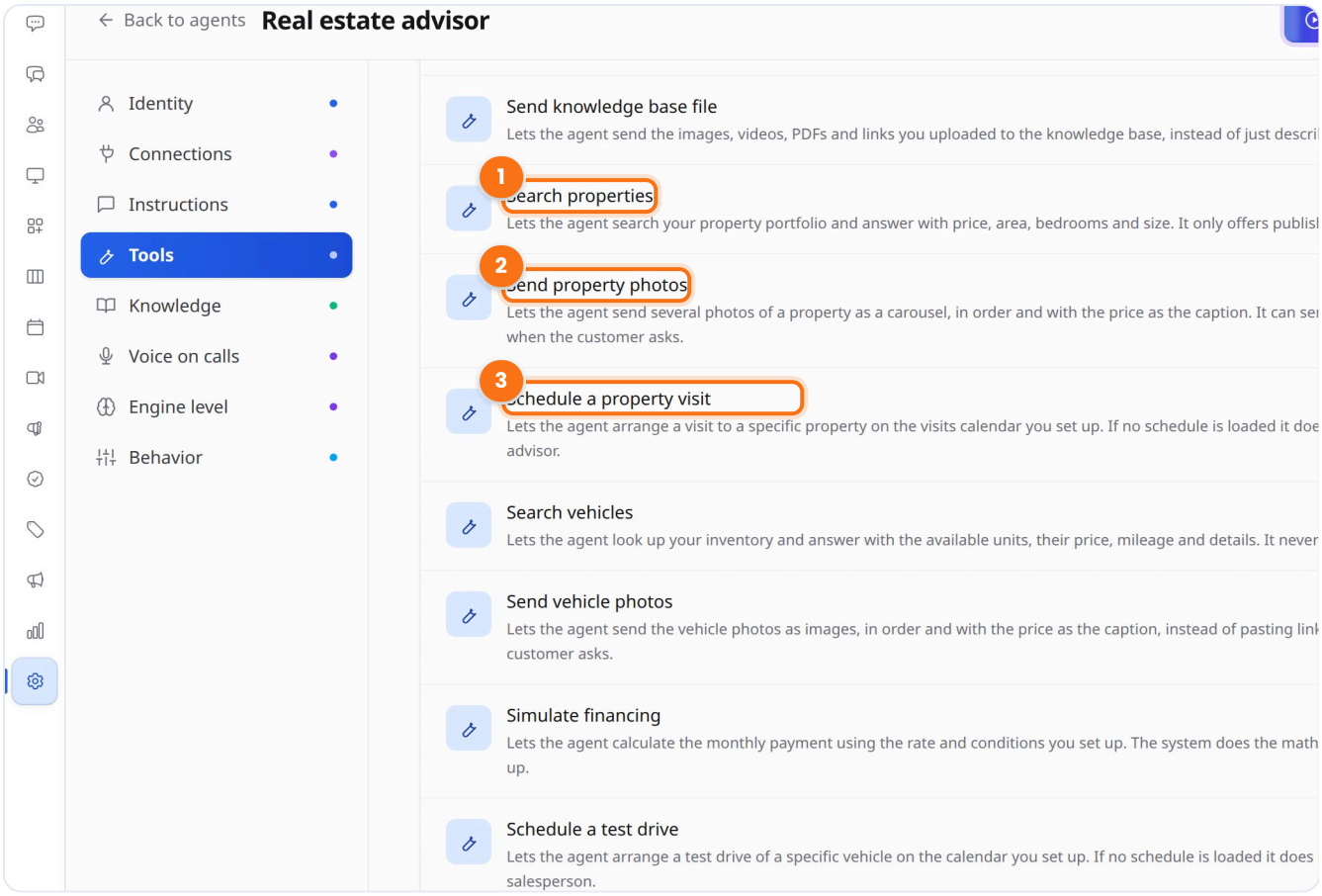
Before you start

- You have **published and available** properties, with photos tagged by room.
- In **Settings** you chose the **Visits calendar** and that calendar has business hours.

Step by step

1. Go to **AI Agents** → **Create AI agent** → **From scratch** → **Start blank** (or open an agent you already have).
2. Under **Identity**, give it a name, for example "Real estate advisor".
3. Under **Instructions**, paste the sample prompt on the next page and change the agency name.
4. Under **Tools**, switch on the three real estate tools and **Assign to agent or team**. Click **Save**.
5. Try it in the **Live tester** as if you were a customer.
6. Under **Connections**, connect it to your channels.

Tool	What it does
Search properties `search_properties`	Searches by listing type, area, budget, bedrooms, pets... It only sees published and available properties, never the exact address.
Send property photos `send_property_photos`	Sends up to 6 photos of a property, in order, or only those of one room. The first one carries title and price.
Schedule a property visit `book_property_visit`	Offers free slots from the viewings calendar and books the appointment linked to the property. Without business hours, it does not book.
Send quotes `create_quote`	Optional (Catalog group): builds and sends a quote with the property. See chapter 9.
Assign to agent or team	Hands the conversation to a person.



The agent's **Tools** tab.

1. **Search properties**
2. **Send property photos**
3. **Schedule a property visit**

Sample prompt: «Real estate advisor»

Copy it into **Instructions**. Tools are named with **!** in front, as in the editor.

```
# Role
You are the virtual real estate advisor of Horizonte Propiedades, an agency in Ecuador that sells and
rents houses, apartments, offices, warehouses and land. You chat with people who are looking for a
property.

# Tone
Warm, professional and brief: short messages, one question at a time. Always reply in the customer's
language.

# What to ask
Before recommending, find out whatever is missing: whether they want to buy or rent, the city or
neighborhood, the budget and how many bedrooms they need. Don't ask everything at once.

# When to use !search_properties
Always before talking about prices, availability or features. Offer three options at most, with the
neighborhood, the price and the highlights of each. If nothing matches exactly, offer the closest one
and say so clearly.

# When to use !send_property_photos
When the person is interested in a specific property or asks for photos. If they ask about one room
("what's the kitchen like?"), send only the photos of that room.

# When to use !book_property_visit
As soon as they want to see a property in person. Offer two or three real time slots returned by the
```

```
tool, ask only for name and phone, and confirm the date and time.

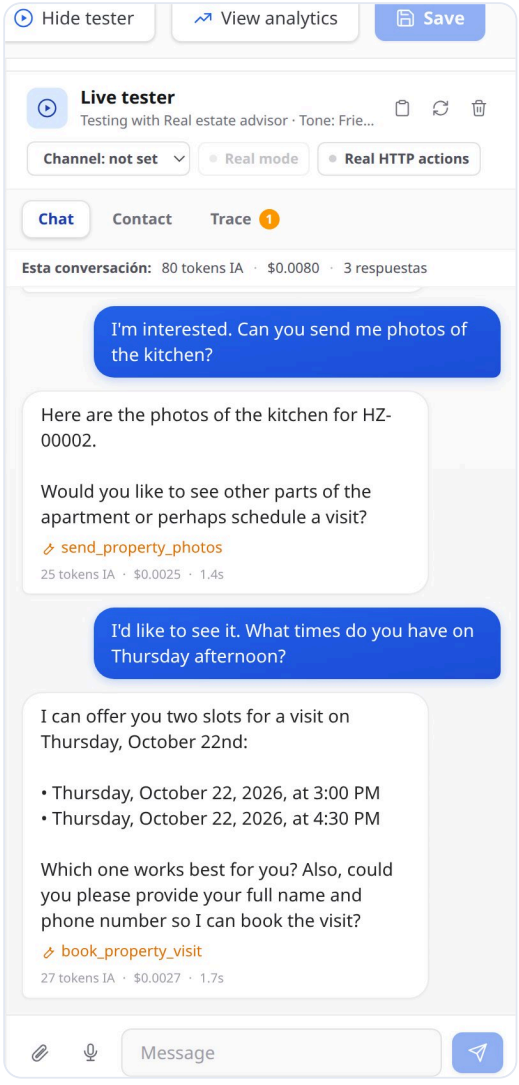
# When to hand over to a person
If they want to negotiate the price, talk about financing or ask for something that is not in the
portfolio, use !assign_to_user_or_team and tell them an advisor will write soon.

# Never
- Make up properties, prices, photos or time slots.
- Give the exact address: only the neighborhood and the city. The advisor confirms it with the visit.
- Offer properties that are sold, rented or reserved.
```

Testing it

In the tester, property search actually runs. Tools that send or write (send the photos, book the viewing) are **simulated**; since book a visit is also the tool that looks up time slots, in the tester the agent gets no real slots and the times it suggests are just examples and shown in the conversation by name. In a real chat they do run: the photos reach the customer and the viewing lands in the calendar, linked to the property.

- Try a search with no exact match: it should offer the closest option and say so.
- Ask for the address: it should answer with the neighborhood and say the advisor will confirm it.
- If you change a price, there is no need to touch the prompt: the AI reads it from the listing in every conversation.
- Each answer uses AI credits from your plan.



The tester: search, kitchen photos and a viewing request (example times).

09

CHAPTER 9

Send listings and quotes

Properties can also be sent from the inbox and quoted.

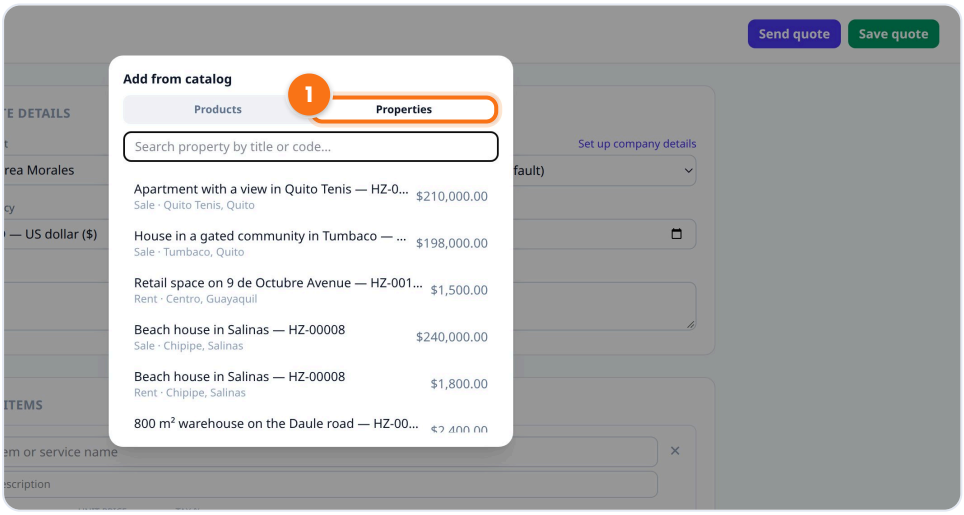
Send a listing from the conversation

In the inbox, inside a conversation, the button to send a catalog item has a properties tab: pick the property and the photos (up to six), and the customer receives them with the title and price in the caption. If you turned off **Show the price publicly**, the price is left out. On channels that don't accept images, it is sent as text.

> **NOTE**
> On WhatsApp, after 24 hours since the customer's last message only approved templates can be sent.

Quote a property from the panel

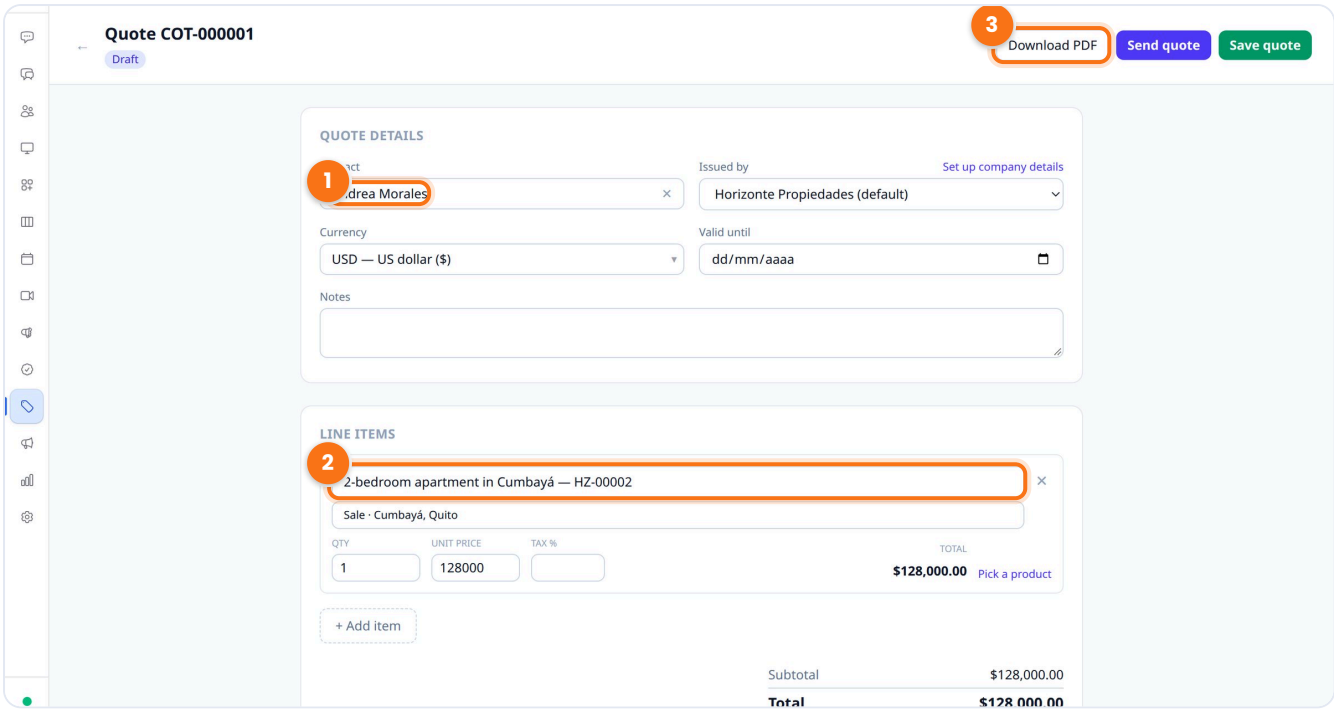
1. Go to **Catalog** → **Quotes** and click **New quote**.
2. Pick the **Contact**.
3. On the line, click **Pick a product** and open the **Properties** tab. Search by title or code and pick the property.
4. The line fills in with title and code, listing type and neighborhood, and the price. Adjust if needed and click **Save quote**.
5. Download the PDF or click **Send quote**: the customer gets a link to view, accept or decline it.



Pick a product → **Properties** tab.

1 **Properties**

- Only properties you can offer show up: sold, rented or inactive ones are left out.
- A property for sale and for rent appears twice: with the sale price and with the monthly rent.
- The tab is there while Real Estate is on and has properties.

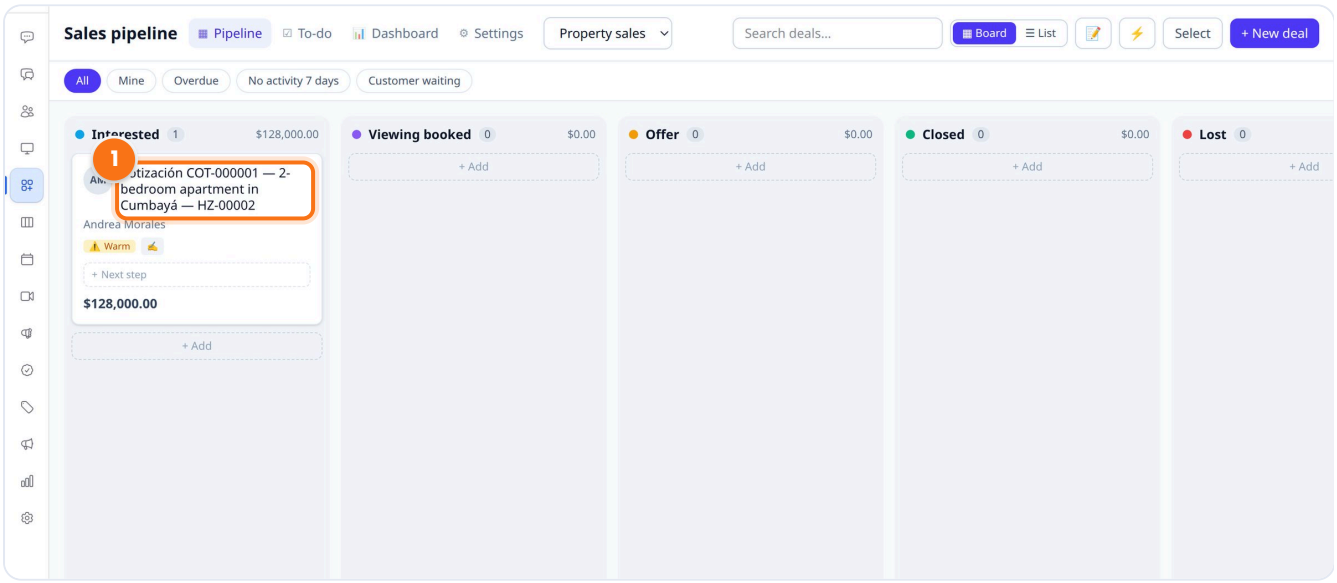


The saved quote, with the property as a line.

1 **Contact**

2 Property line

3 **Download PDF**



With **Create a CRM deal** on, the quote creates the deal in the chosen pipeline and stage.

1 The deal from the quote

Quotes by the AI agent

If the agent has the **Send quotes** tool on (Catalog group), it can build the quote with a property from your portfolio when the customer asks; the price comes from the listing, never from the model, and it won't quote if the price is not public. The customer gets the link to view, accept or decline it, and the deal enters the CRM just like from the panel.

10

CHAPTER 10

FAQ and current limits

The most common questions and what the module does not do yet.

Current limits

No public listing site of its own

Real Estate does not publish a website with your portfolio: properties are shown in chat (AI agent or your team) and in quotes.

No reservation payments

Omnifox does not collect reservation deposits. You set the **Reserved** status yourself; what it does on its own is expire it after the hours you set in Settings.

Up to 6 photos per send

The agent sends at most six photos in a row so the chat is not flooded; the rest can be requested or seen at the viewing.

Viewings need business hours

If the viewings calendar has no business hours, the agent won't book and hands over to a person.

Frequently asked questions

Does it cost anything to turn on Real Estate?

No. Turning on catalog modules is free. AI agent replies use AI credits from your plan.

Why doesn't the agent offer a property?

Check that it is **published** and **Available**. Reserved, sold, rented and inactive properties are not offered.

Can I hide the price of some properties?

Yes: leave the price empty on that listing and it shows "Price on request". To hide it on all of them, turn off **Show the price publicly** in Settings.

What happens to viewings if I sell the property?

When you mark it sold or rented, it is unpublished automatically. Existing viewings and quotes are kept.

When is the CRM deal created?

Only if you turned on **Create a CRM deal** in Settings: when a property is quoted and when the AI agent books a viewing. In the agent tester actions are simulated and nothing is created.

Does a reservation release itself?

Yes, if **Hours a reservation holds without a deposit** is above zero: after those hours the property goes back to Available and the agent offers it again.

If I import the same file twice, will it duplicate?

No, as long as the file has the code column: properties are updated by code.

Who can change the settings?

The account owner and admins. Agents can see the settings and work with the portfolio.

Can it connect to another system?

Yes: properties and their photos are available in the Omnifox API (`/api/v1/properties`).



Need help?

Watch the module video tutorial on the Omnifox YouTube channel. If something doesn't look like the manual, write to us from **Support**, top right in Omnifox.