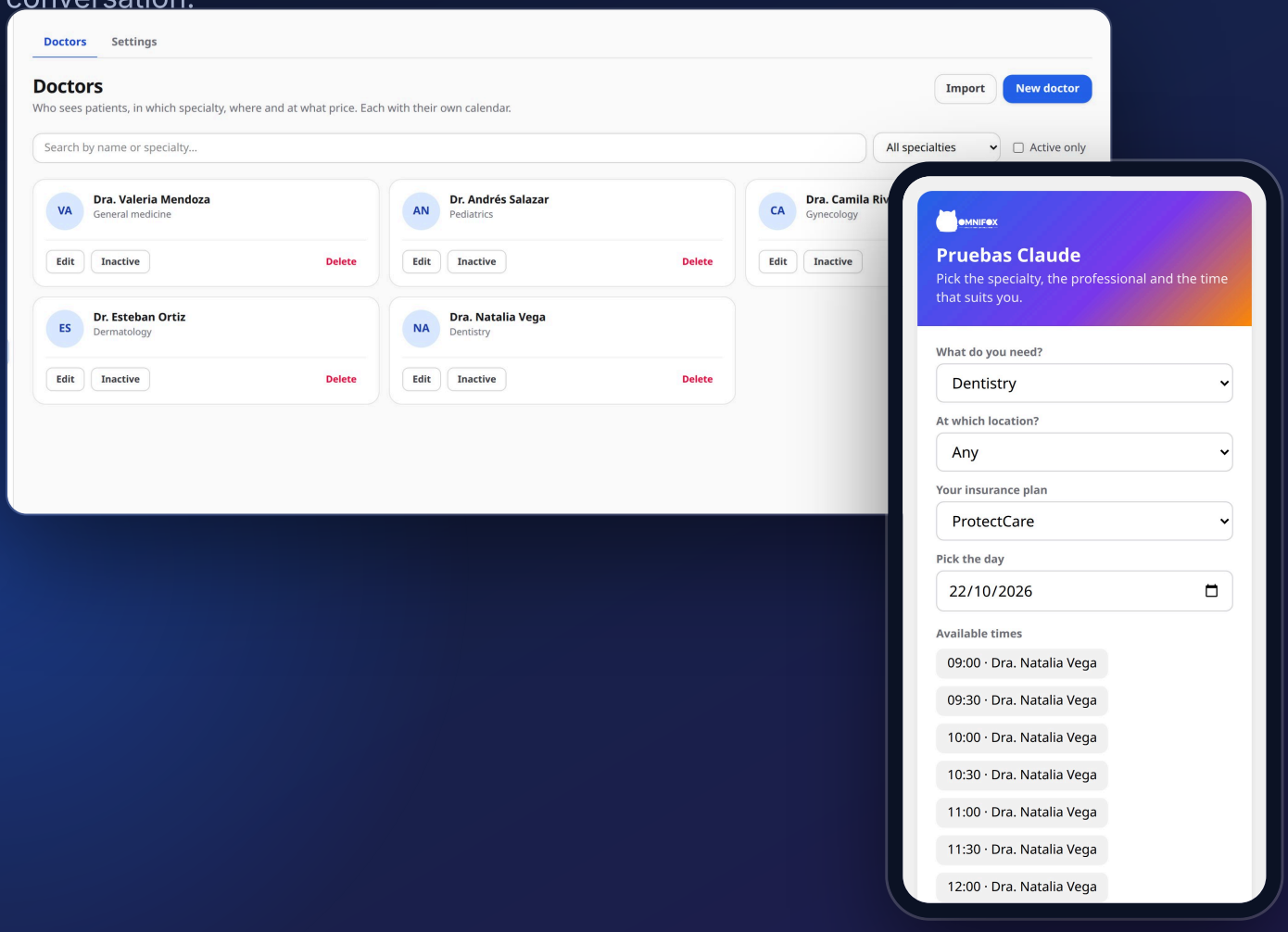
Omnifox

MODULE MANUAL

Medical

Book your practice's or clinic's appointments over WhatsApp, Instagram, Messenger and your website: doctors with specialties, hours by location, their own prices, insurance plans, a page where patients book on their own, and an AI agent that books right in the conversation.



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How to read this manual

The screenshots are real Omnifox screens with a sample clinic, **Santa Lucía Clinic**: five doctors (general medicine, pediatrics, gynecology, dermatology and dentistry), two locations (**North Clinic — Quito** and **Cumbayá Clinic**) and three insurance plans. The numbers in orange circles (1) point to what is explained below each image.

Button and field names are in **bold**, exactly as they appear on screen.

01

CHAPTER 1

What the Medical module is and who it is for

A Catalog module for private practices, multi-location clinics and labs. It organizes who sees patients, for what, when, where and at what price, and lets patients book on their own or by chat.

The Medical module organizes everything between the patient's question ("do you have a pediatrician?", "how much is it with my insurance?") and the appointment in the right doctor's calendar. Because it lives inside Omnifox, the same information is used by your team in the inbox, by the AI agent in the conversation, and by the public page where patients book without calling.

Locations
Where patients are seen

→

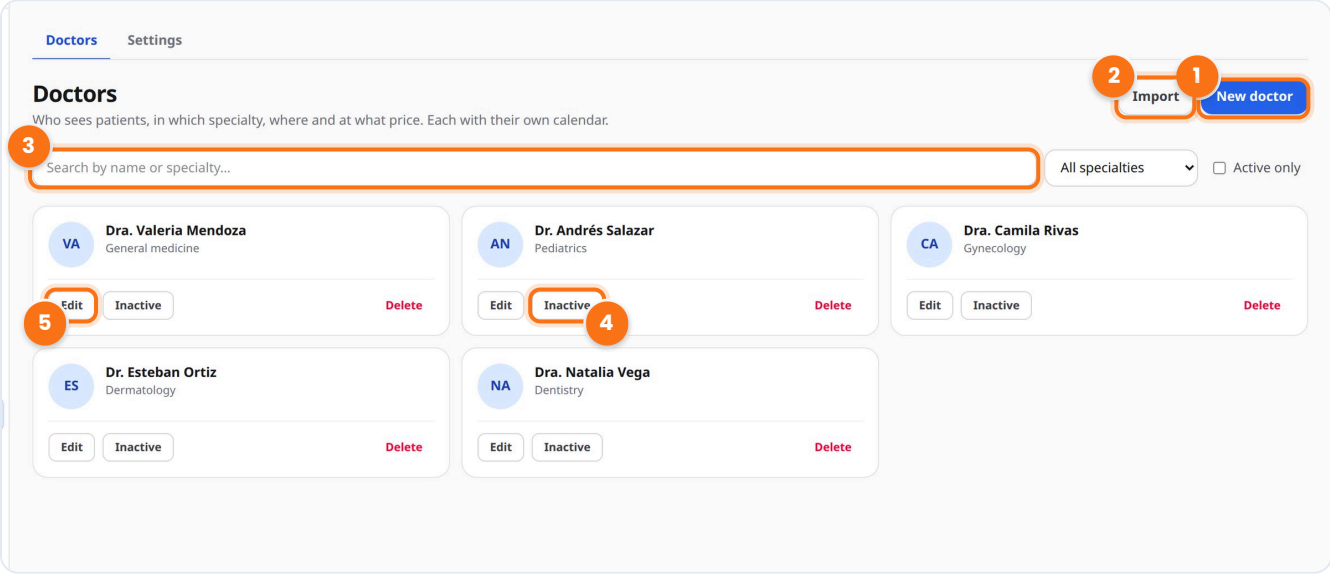
Visit types
Services with price and duration

→

Doctors
Specialty, hours by location and own price

→

Appointments
In each doctor's calendar, from the panel, the web or the AI



The **Doctors** tab of the sample clinic.

1. **New doctor** opens the profile.
2. **Import** loads your staff from Excel or CSV.
3. Search by name or specialty, filter by specialty, and show active only.
4. **Inactive** takes a doctor off the schedule without deleting them.
5. **Edit** opens the full profile.

Who it is for

Business	How they use it
Solo practice	One doctor, one location, their hours and the booking link on their Instagram.
Clinic with several specialists	Each doctor with their own calendar, specialty and price; the patient picks who.
Multi-location clinic	Hours by location: the same doctor works mornings at one site and afternoons at another.
Dentistry, dermatology, aesthetics	Visits of different lengths (45-minute cleaning, 20-minute check-up) and each professional's own price.
Lab or imaging center	Appointments by type of test, with a reminder hours before for fasting or preparation.

PRIVACY

This module **books appointments: it does not keep medical records**. For each patient it stores only the name, phone, ID document and the reason for the visit in one sentence. No diagnoses, prescriptions, history or results, and the AI agent is told never to ask for them.

WHAT IS INCLUDED

Turning on the module is free and does not change your plan. The AI tool **Check appointment availability** requires the **Crece** plan or higher; **Search doctors** and **Book with a doctor** have no minimum plan.

02

CHAPTER 2

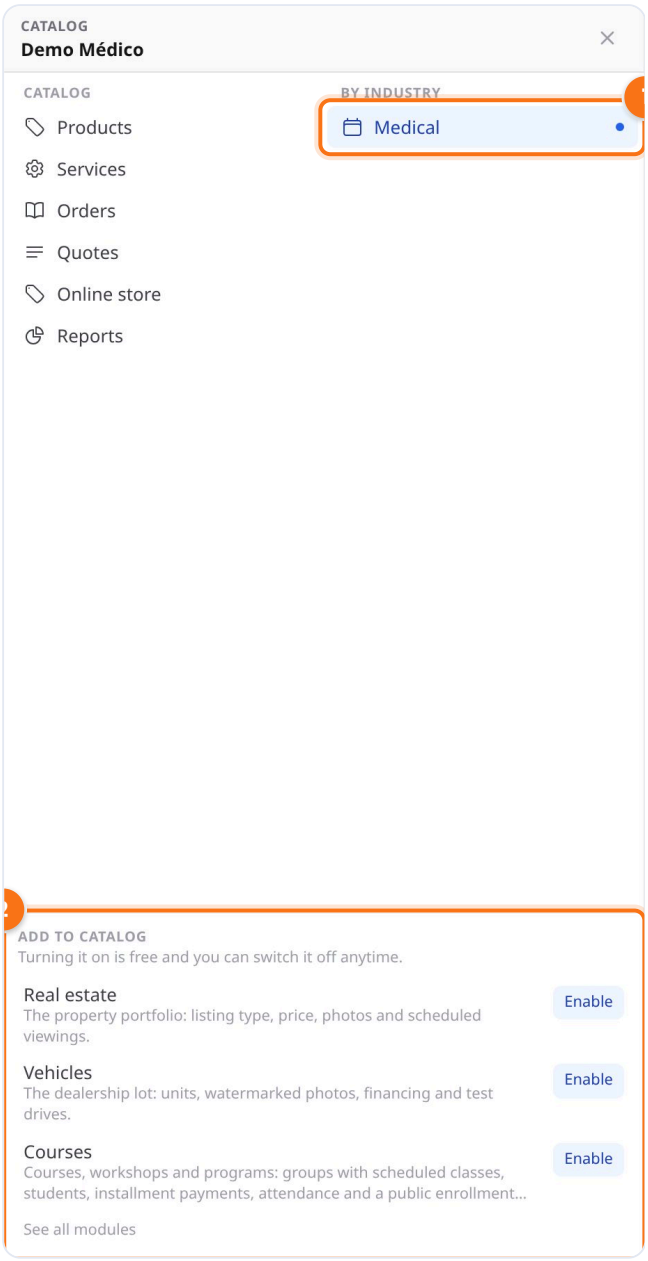
Turn on the module

Medical starts turned off. You enable it per workspace in two clicks, and turn it off just as easily.

From the Catalog panel

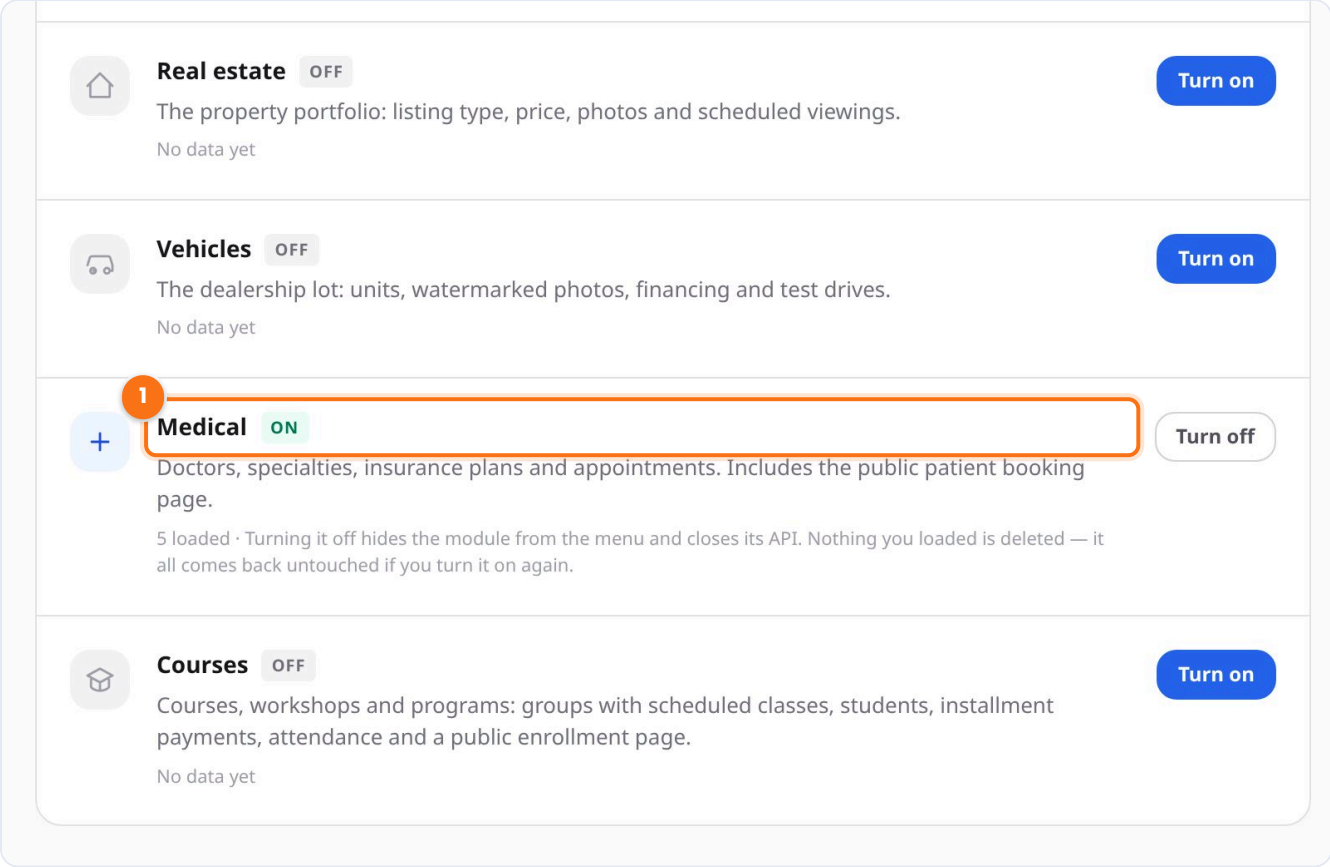
1. In the sidebar, open **Catalog**.
2. At the bottom of the panel, under **Add to catalog**, you will see the modules your workspace has not turned on yet.
3. Next to **Medical**, click **Enable**.
4. The **Medical** entry appears right away in the **By industry** group. Inside there are two tabs: **Doctors** and **Settings**.

> **NOTE**
>
> Turning modules on and off is done by the owner or an admin. If you have several workspaces, turn it on in each one where you see patients.



The Catalog panel with Medical already on.

1. **By industry → Medical.**
2. **Add to catalog**: the modules still off.



The full list of modules, each with its status and button.

1 Medical, turned on. Turning it off hides it from the menu; nothing you loaded is deleted.

TIP

Turning the module off does not break the public page: links you already shared keep working, so nobody is left with a dangling appointment.

03

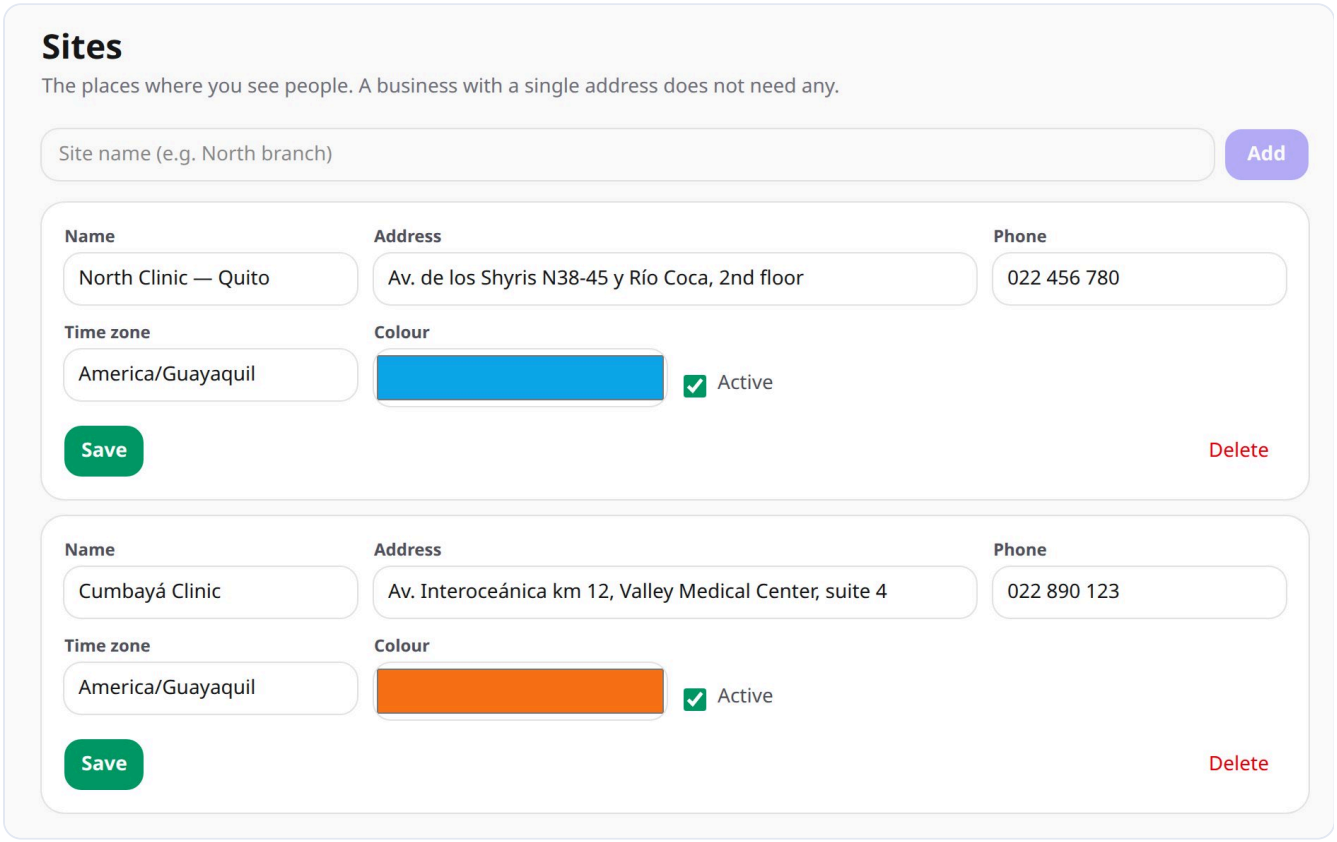
CHAPTER 3

Before you start: locations and visit types

Two pieces the module uses that live on other screens: locations (in Calendar) and visit types (in Services or in Calendar).

Locations

Locations are the places where patients are seen. You create them in **Calendar → Sites**: type the name, click **Add** and fill in the address, phone and time zone. If you work in a single place, you don't need any.

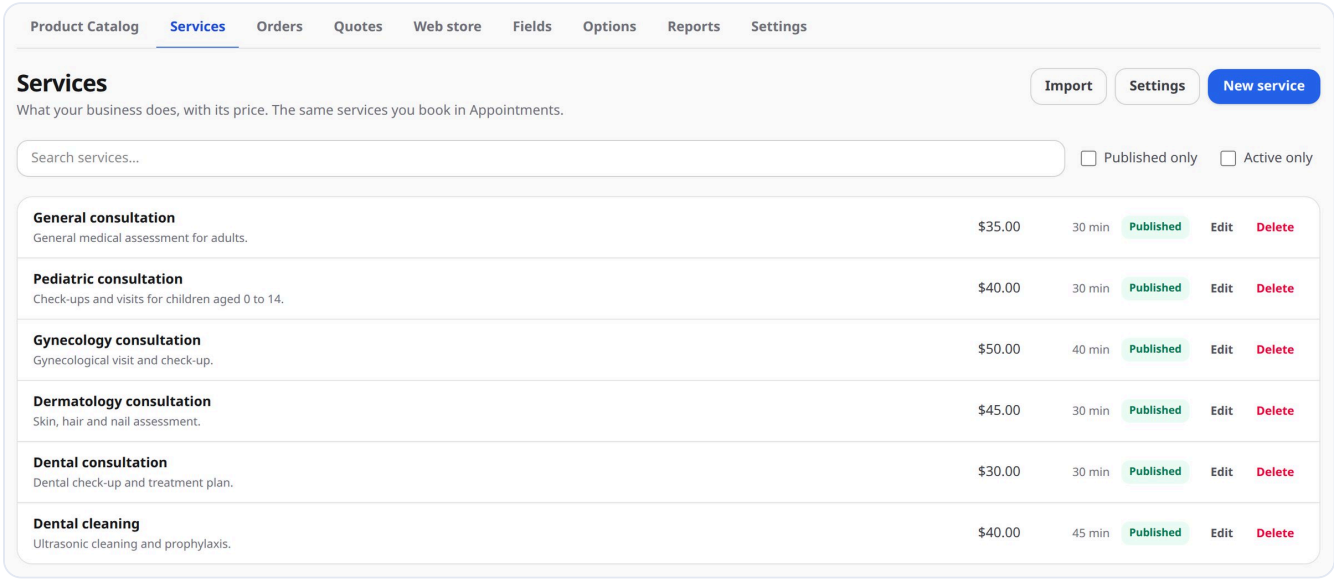


The two locations of the sample clinic.

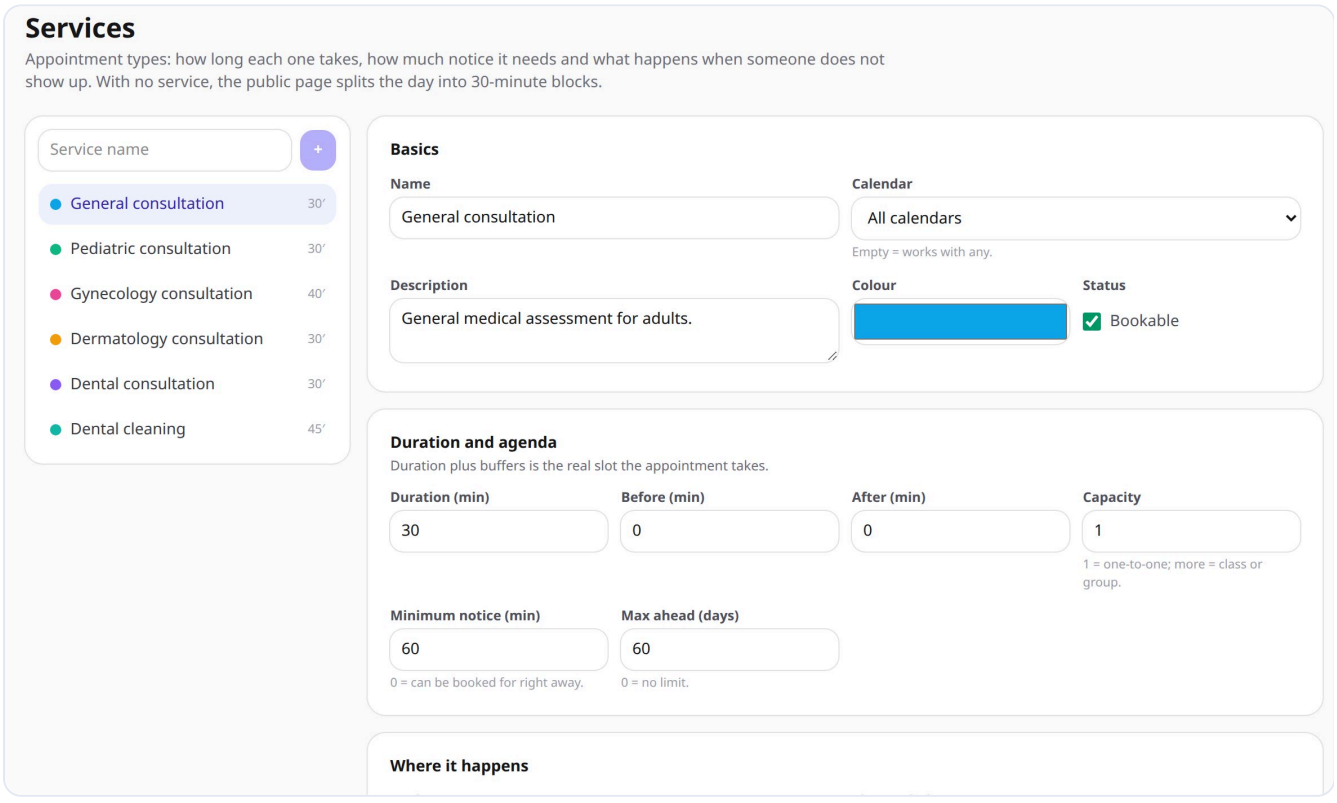
Visit types

Each visit type is a **service** with a duration and, if you like, a base price: "General consultation, 30 min, $35", "Dental cleaning, 45 min, $40". They are the same services you book in Appointments, and there are two places to create them:

Where	What it stores	When to use it
The **Services** module (Catalog → Services → **New service**)	Name, duration **and base price**, description, photos.	If you want a list price per visit (used by the doctor profile, the insurance price grid, the public page and the AI).
Calendar → Services	Name, duration, notice, policies. **No price**.	If you don't want to turn on the Services module: set the price on each doctor's profile (**Own price**).



In the Services module: the clinic's six visit types, with price and duration.



The same visit types in **Calendar → Services**: duration and calendar rules.

TIP

Medical **does not need** the Services module to be on: the doctor profile reads the visit types directly, wherever they were created.

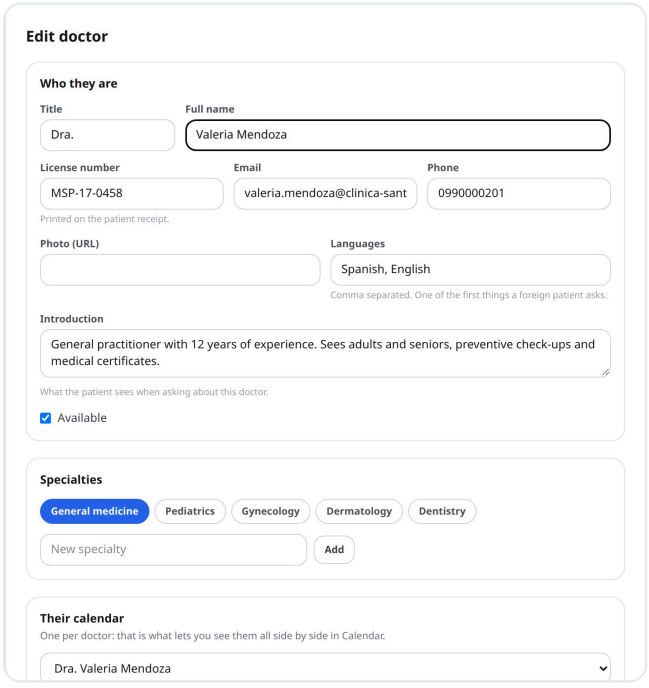
04

CHAPTER 4

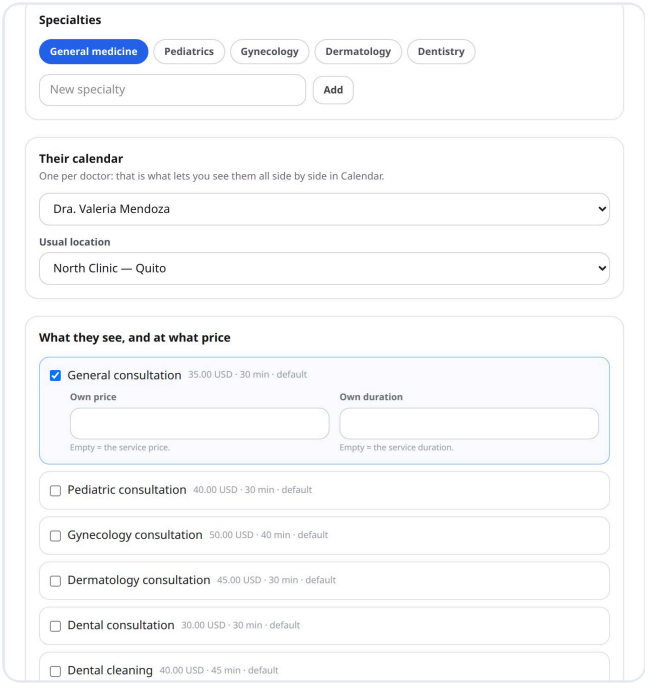
Add your doctors

Adding a doctor is a single task, in a single window: who they are, what they see, when, where and how much they charge.

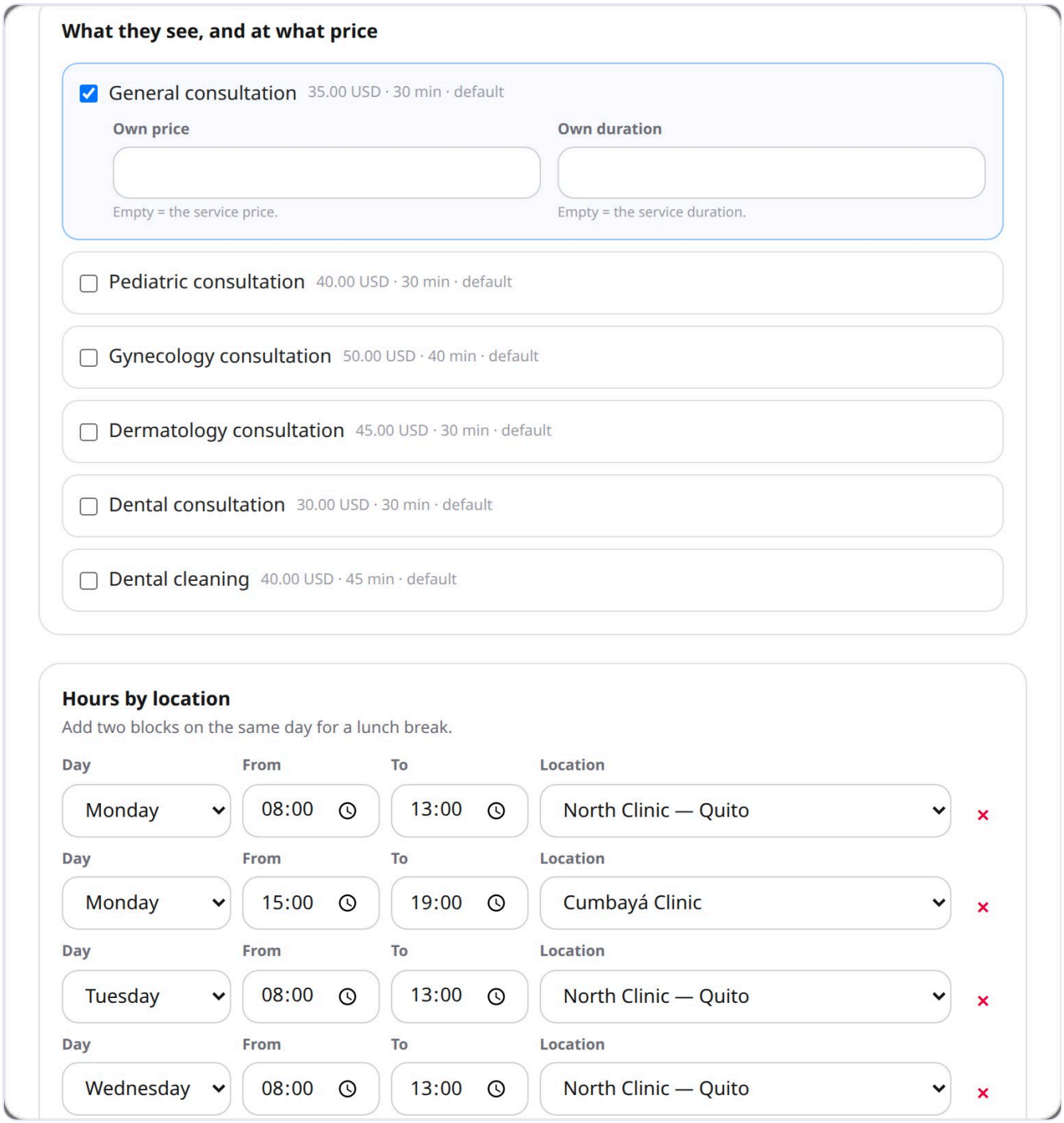
1. In **Medical** → **Doctors**, click **New doctor**.
2. Fill in **Who they are**: title (Dr., Prof.), full name and, optionally, license number, email, phone, languages and an introduction.
3. Select their **Specialties**. If one is missing, type it in **New specialty** and click **Add**: it is created and selected.
4. Under **Their calendar** keep **Create a new calendar for this doctor** and choose their **Usual location**.
5. Under **What they see, and at what price** check the visits they offer; if they charge differently or take longer, enter their **Own price** or **Own duration**.
6. Add their **Hours by location** (chapter 5) and select the **Accepted plans**.
7. Click **Save**. Their calendar is created automatically and the doctor is ready to take appointments.



Who they are: what the patient sees when asking about the professional.



Specialties and **Their calendar**.



What they see, and at what price: a checked visit shows the own price and own duration fields.

Field	What it is for
Title and **Full name**	How the doctor is named in the calendar, on the public page and in the chat ("Dra. Valeria Mendoza").
License number	Printed on the patient receipt.
Languages	Comma separated. One of the first things a foreign patient asks.
Introduction	Two lines about the professional; the AI agent uses them to introduce the doctor.
Available	When off, the doctor offers no appointments (same as the **Inactive** button on the card).
Their calendar	Each doctor has their own calendar: that is how you see them all together in the Calendar without overlapping.
Own price / **Own duration**	If empty, the service values are used. A specialist can charge more for the same visit.

Deactivate, delete and import

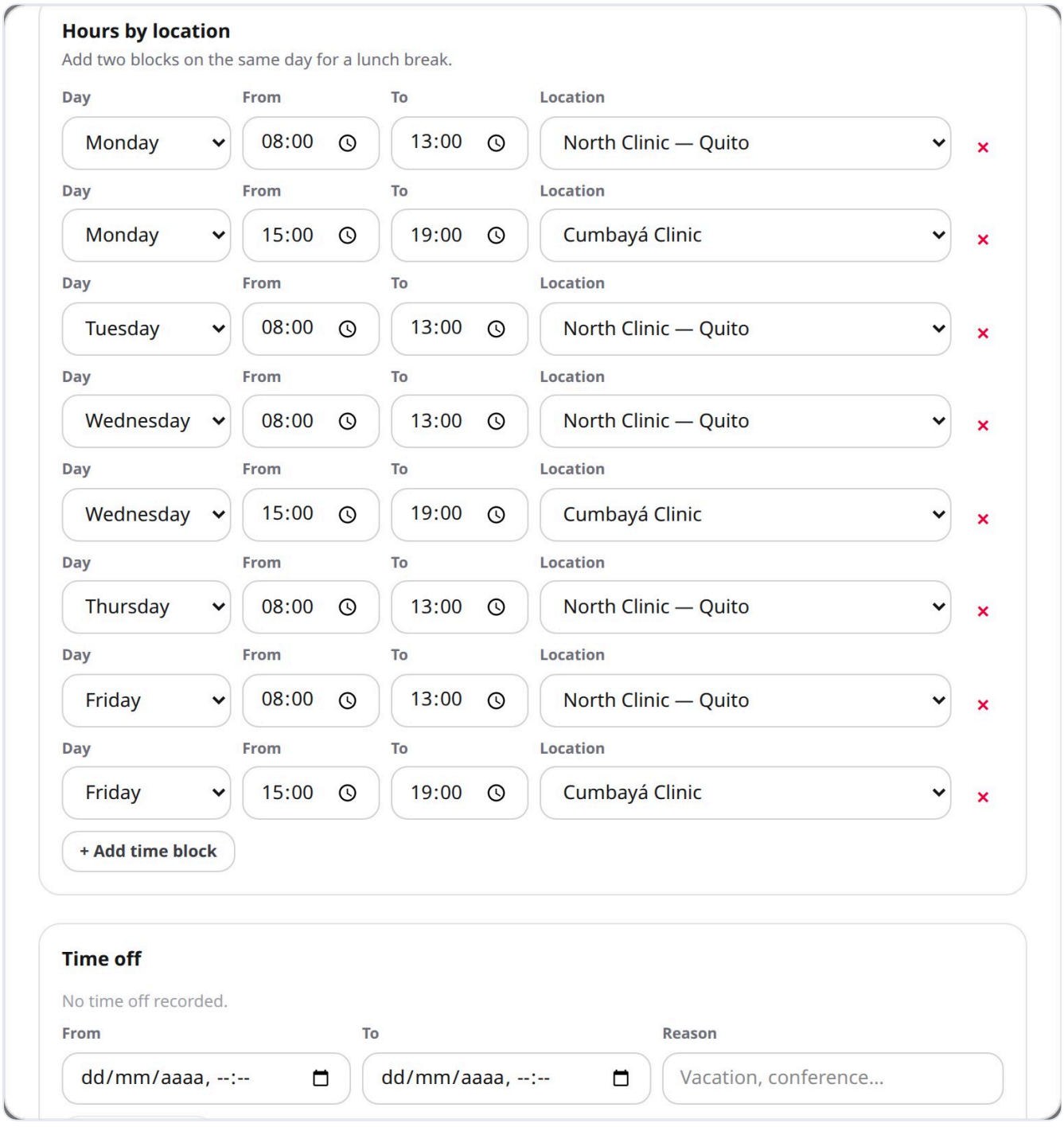
Inactive takes the doctor out of booking without deleting their history. **Delete** asks for confirmation and, if the doctor has future appointments, tells you how many so someone can notify those patients. **Import** loads your whole staff from a spreadsheet (Excel or CSV) with a preview before anything is created.

05

CHAPTER 5

Hours by location and time off

Hours say when and where each doctor sees patients. They are the basis of the free times the patient and the AI agent see.



Hours by location for Dr. Mendoza: mornings at the North Clinic and three afternoons in Cumbayá.

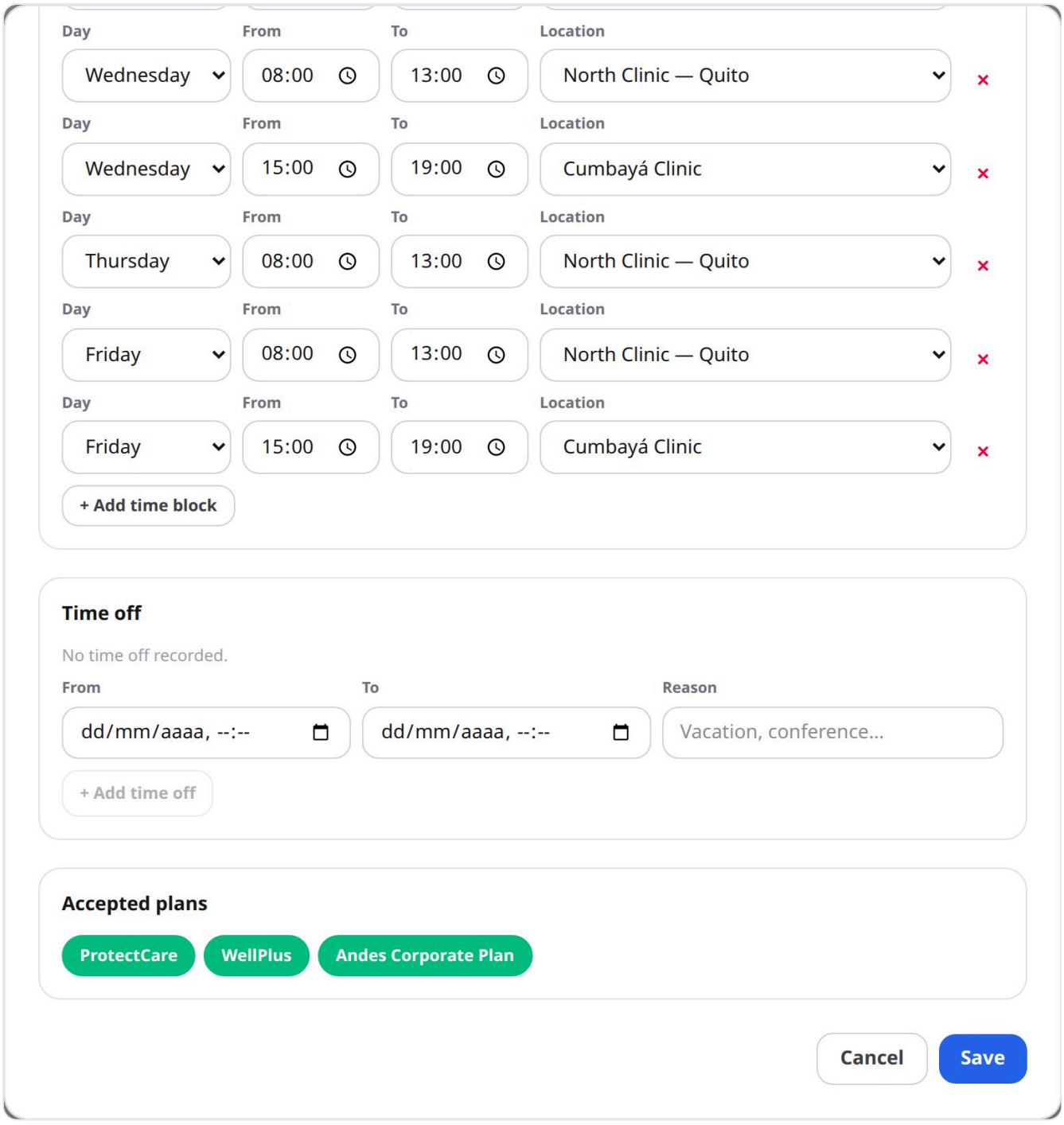
1. In the doctor profile, under **Hours by location**, click **+ Add time block**.
2. Choose the **Day**, the **From** and **To** times, and the **Location**.
3. For a lunch break, add two blocks on the same day (for example 09:00–13:00 and 14:00–17:00).

4 Repeat for each day and save.

> **WATCH OUT**
> Without hours, the doctor offers no appointments at all. If you choose **Any location**, the block applies to all of them.

Time off

For a vacation, a conference or a free afternoon, open the doctor's profile and, under **Time off**, set **From**, **To** and the **Reason**, then click **+ Add time off**. It is saved instantly, without waiting for the Save button. If the time off overlaps appointments already booked, Omnifox tells you how many: it does not cancel them on its own, so someone can talk to those patients.



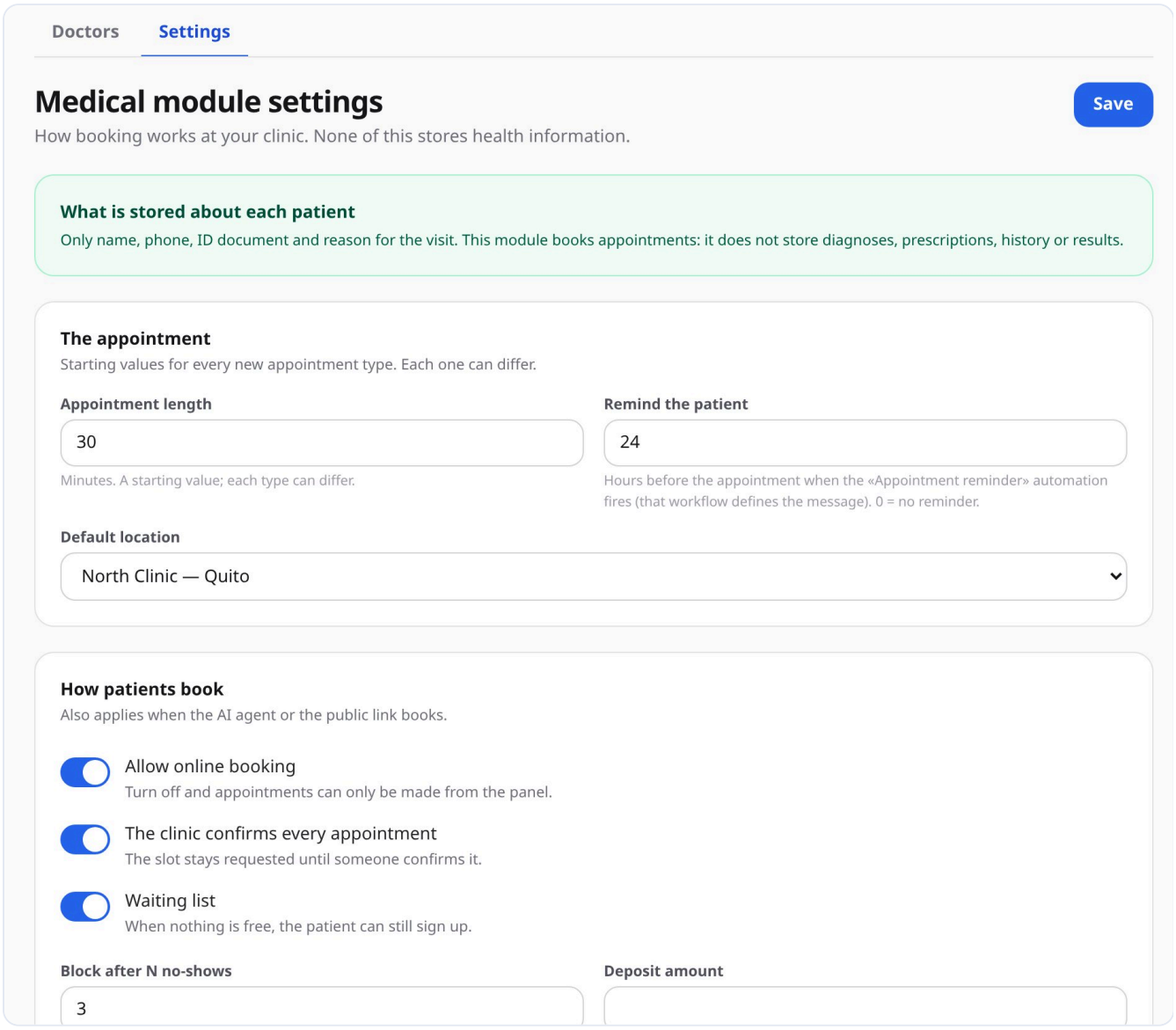
Time off and **Accepted plans**, at the end of the profile.

06

CHAPTER 6

Module settings

How your clinic books. Settings are saved by the owner or an admin; the rest of the team sees them read-only.



At the top, what is stored about each patient; below it, **The appointment**.

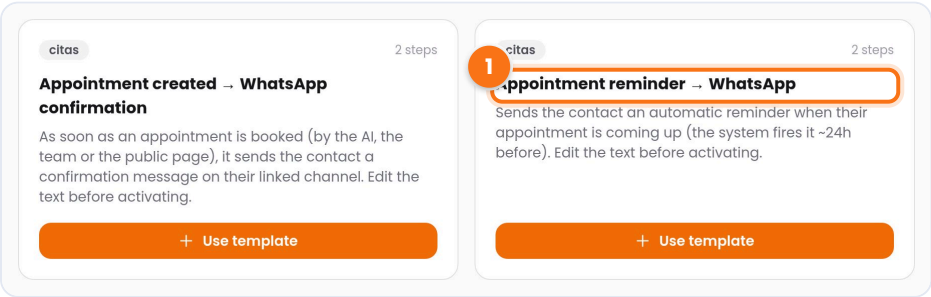
Setting	What it does
Appointment length	Default minutes for a new visit type. Each service can have its own.
Remind the patient	How many hours before each appointment the **Appointment reminder** automation fires (see below). 0 = no reminder.
Default location	Used when the doctor has no usual location.
Allow online booking	When off, the public page says the clinic does not take appointments online.
The clinic confirms every appointment	The appointment stays "scheduled" until someone confirms it.
Waiting list	When nothing is free, the patient can still sign up.
Block after N no-shows	0 = never. Only affects automatic booking (web and AI), not someone calling in.
Require a deposit and **Deposit amount**	Indicates the visit requires an advance payment. Omnifox does not charge it for you.
Ask for ID document / **Ask for the reason for the visit**	The only two fields this module asks for; both can be turned off.

> **NOTE**
> The waiting list, the no-show block and the deposit are the values each **new visit type starts with**; if a service has its own value, the service value wins.

The appointment reminder

Remind the patient doesn't send a message by itself: it decides **when** the **Appointment reminder** automation fires. You write the text, and choose the channel, in that automation.

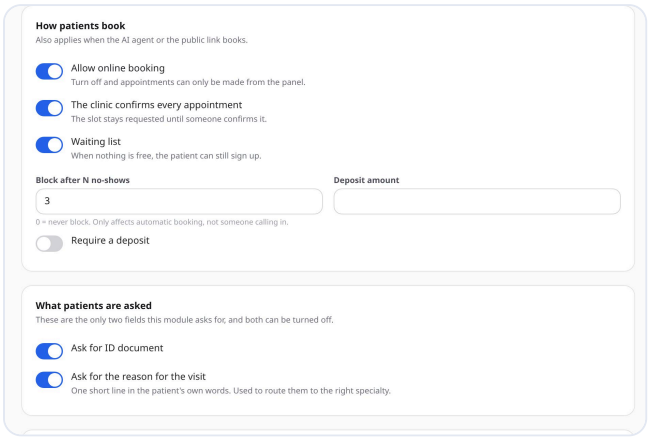
1. In **Medical** → **Settings** → **The appointment**, enter in **Remind the patient** how many hours before you want to remind (for example, 24) and save. **0** = no reminder.
2. Go to **Workflows** and click **Templates**.
3. Pick **Appointment reminder** → **WhatsApp** and click **Use template**.
4. Edit the message text (you can use the patient's name) and turn the workflow on.



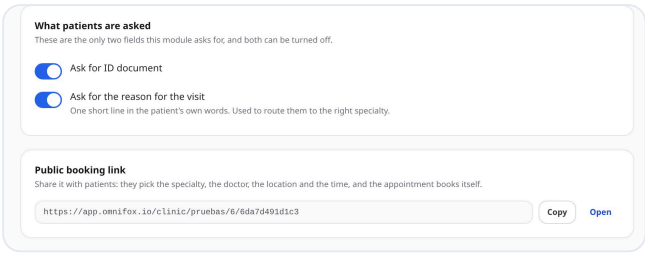
The **Appointment reminder** → **WhatsApp** template in Workflows → Templates.

NOTE

Omnifox checks appointments every hour: the reminder goes out within the hour the lead time is reached, once per appointment, and only for scheduled or confirmed appointments. If you add the **Hours before** filter to the automation, use the same number as in Settings. For the message to arrive, the patient needs a connected channel (for example, their WhatsApp).



How patients book: also applies when the AI or the patient on the web books.



What patients are asked and the **Public booking link**.

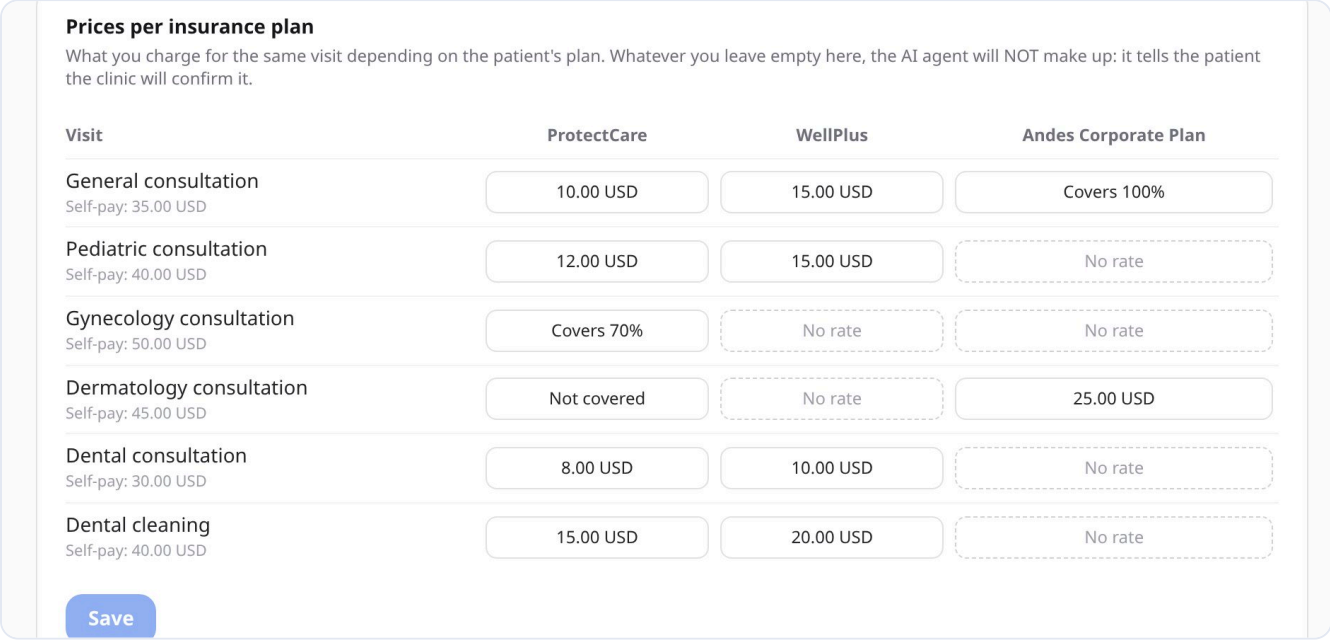
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CHAPTER 7

Insurance plans and prices per plan

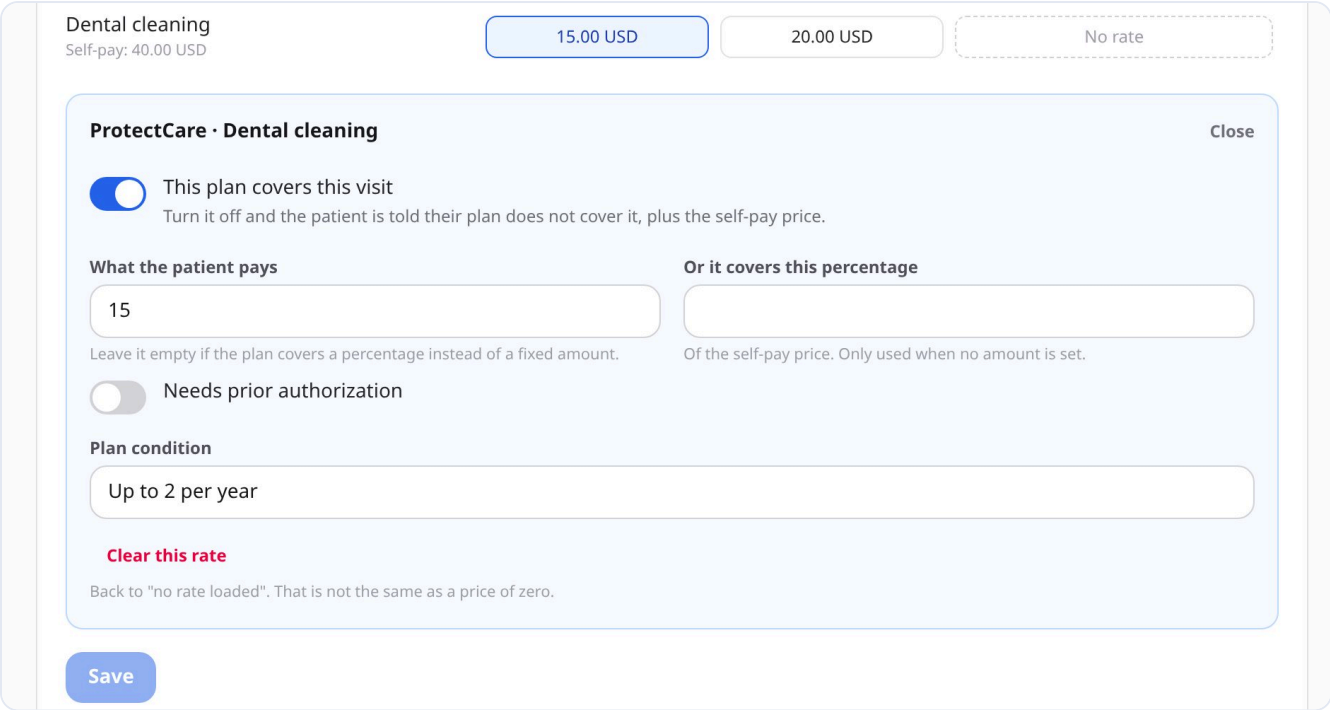
If you charge differently for the same visit depending on the patient's insurance, load it once and both the public page and the AI agent will use it.

1. In **Medical** → **Settings**, under **Insurance plans**, turn on **We work with insurance plans**.
2. Type each plan in **New plan** and click **Add**.
3. In the **Prices per insurance plan** grid, click a cell (visit type × plan) and fill in the editor.
4. Click **Save** below the grid. Only the cells you changed are sent.
5. In each doctor's profile, select the **Accepted plans**.



The grid: each row is a visit type and each column an insurance plan.

The cell says	What it means
10.00 USD	With that plan, the patient pays that amount.
Covers 70%	The plan covers that percentage of the self-pay price.
Not covered	The patient is told their plan does not cover it and the self-pay price.
No rate	Nobody loaded it. The AI and the page **do not make up** a price: they say the clinic will confirm it.



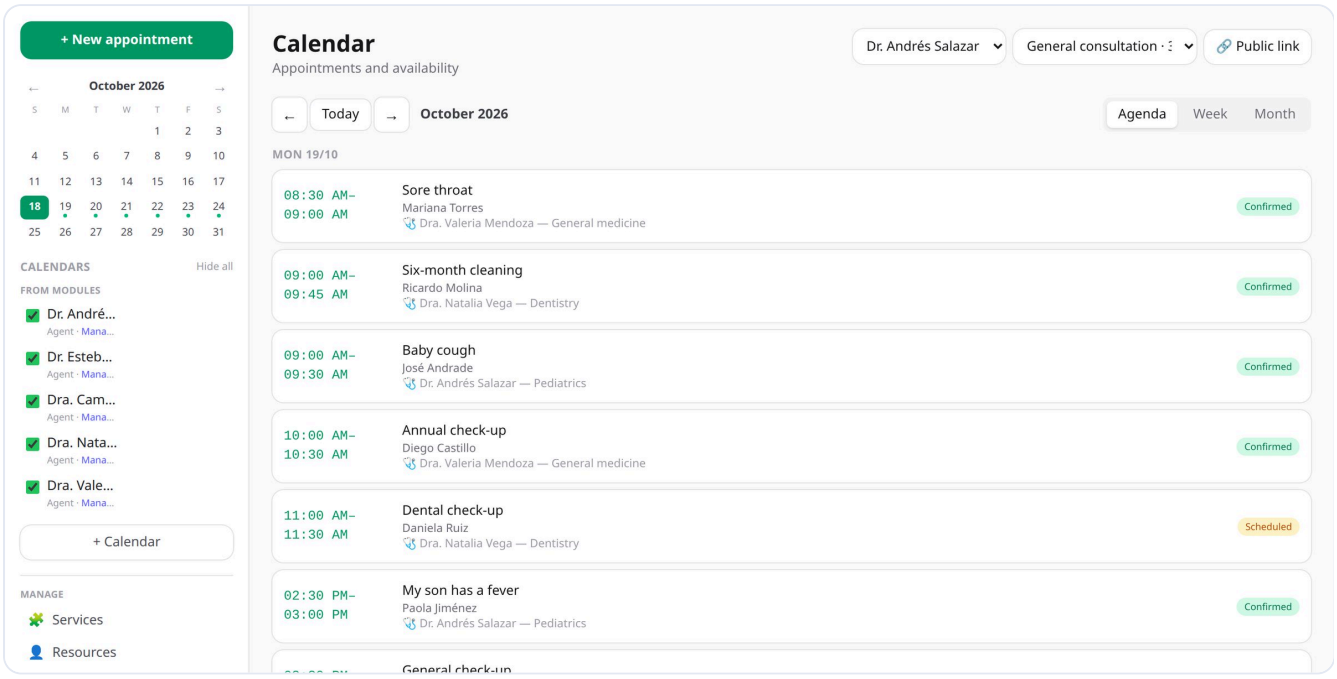
The cell editor: amount or percentage, prior authorization and plan condition.

08

CHAPTER 8

Appointments in the Calendar

Every appointment —from the panel, the public page and the AI agent— lands in the Calendar, each in its doctor's calendar.



The Calendar with the doctors' calendars under **From modules**.

In the left column, under **From modules**, you will find each doctor's calendar; the checkbox shows or hides it. Each appointment shows the reason, the patient, the doctor with their specialty and its status: **Confirmed** or **Scheduled** (requested by the patient or the AI and waiting for the clinic to confirm). Click an appointment to see the details, confirm it, move it or cancel it.

> **TIP**
>
> Two doctors never overlap: each has their own calendar. Two patients cannot take the same time with the same doctor; the second one is told the time was just taken.

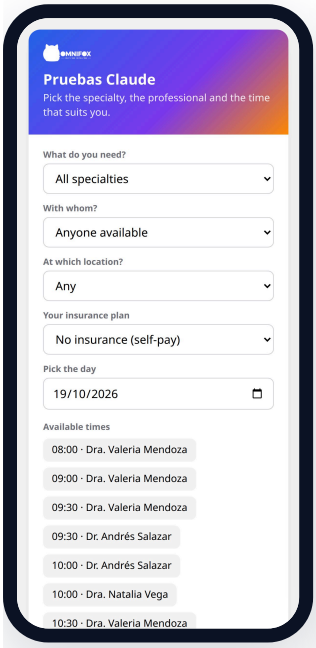
09

CHAPTER 9

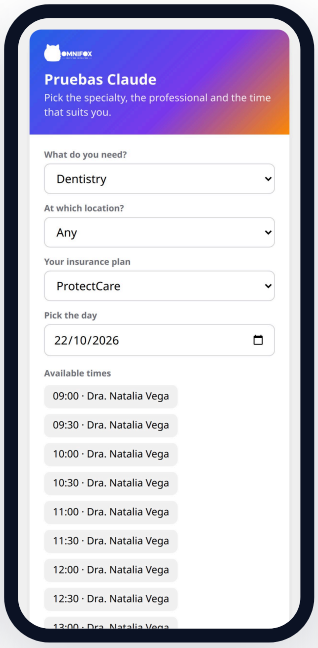
Public booking page

One link for your Instagram, your WhatsApp or your website: the patient picks specialty, doctor, location, insurance and time, and books without creating an account.

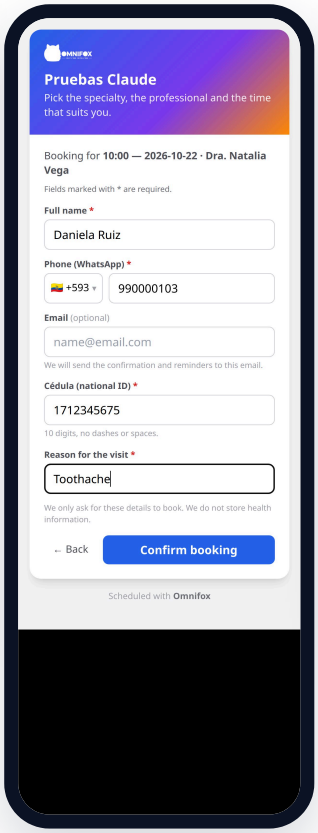
The link is in **Medical → Settings → Public booking link**, with the **Copy** and **Open** buttons. The times it offers are truly free: they come from the hours by location, time off and appointments already taken, with the same engine the AI agent uses.



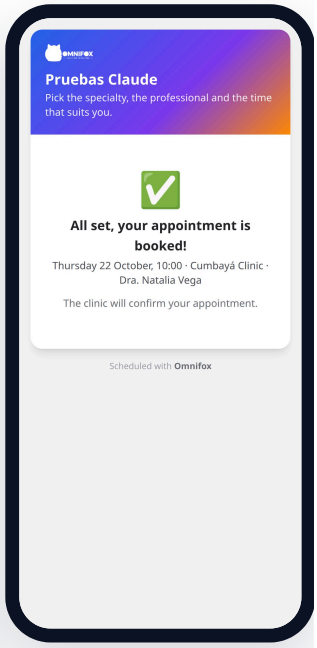
1. Pick what you need, who with, location and insurance.



2. Pick the day and see the free times.



3. Enter name, phone, ID document and reason.



4. Done: the appointment is requested.

NOTE

If the clinic confirms each appointment, the patient sees that the clinic will confirm it and the appointment stays **Scheduled**. If they entered an email, they get the confirmation and any changes.

10

CHAPTER 10

Set up the AI agent

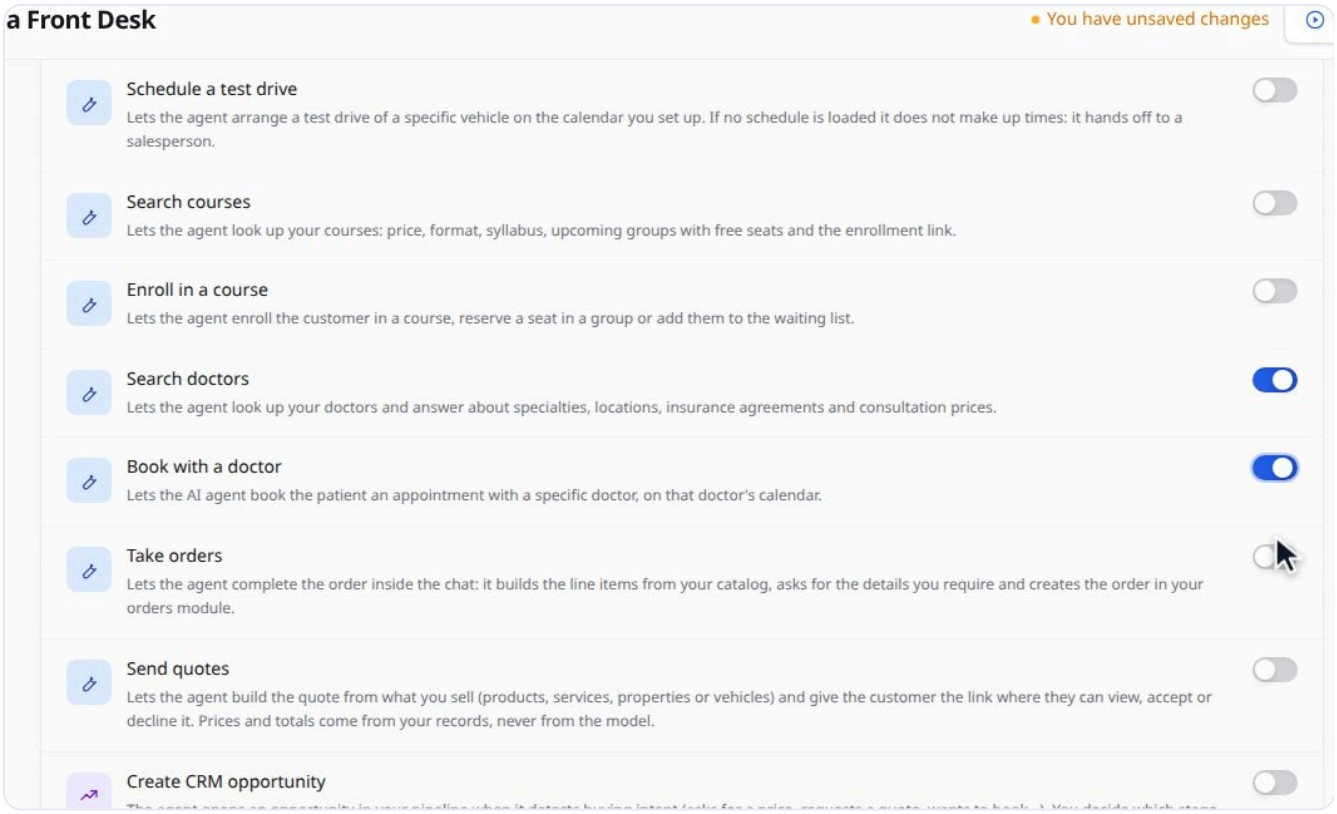
An AI agent that answers who sees what, how much it costs with each insurance plan and which times are free, and books the appointment in the conversation.

The module's tools

Tool	What it does	Plan
Search doctors (`search_doctors`)	Searches by specialty, name or symptom ("I have a toothache") and returns the doctor, location, accepted plans and the price already worded with the patient's plan.	All
Check appointment availability (`check_availability`)	The free times in the doctor's calendar for a given day.	Crece or higher
Book with a doctor (`book_doctor_appointment`)	Books the appointment with the doctor, time and patient details; follows your settings and does not double-book.	All
Assign to agent or team	Hands the conversation over to someone on the team.	All

Step by step

1. Go to **AI agents** and click **Create AI agent**. Choose **From scratch → Start blank**.
2. Under **Identity**, give it a name (for example, "Santa Lucía Front Desk").
3. Under **Instructions**, paste the sample prompt from the next page and change what is in square brackets.
4. Under **Tools**, turn on **Search doctors**, **Book with a doctor**, **Check appointment availability** and **Assign to agent or team**. Save.
5. Try it in the **Live tester**, on the right.
6. When you are happy with it, connect it to your channels under **Connections** and activate it.



The Medical tools turned on in the agent editor.

Sample prompt: clinic front desk

Copy it as is and change what is in **[square brackets]**. Words starting with **!** are the tools.

```
# Role
You are the virtual front desk of [Santa Lucía Clinic]. You answer patients on WhatsApp, Instagram,
Messenger and the website chat who want to know which specialists we have, how much a visit costs, or
book an appointment. Your goal is to answer with real data and book the appointment with the right
doctor.

# Tone
- Warm, clear and professional.
- Short messages: 2 to 4 lines. Only one question per message.
- Use the patient's name when you know it.
- Reply in the language the patient writes in.

# When to use !search_doctors
- ALWAYS before naming a doctor, a specialty, a location, an insurance plan or a price.
- Patients use their own words ("I have a toothache", "my son has a fever"): search by the symptom or
the specialty and let the tool tell you who handles it.
- If they mention their insurance, pass it to get the price with their plan. Repeat the price EXACTLY
as the tool returns it. If the tool says the clinic has not loaded that rate, do not give any number.

# When to use !check_availability
- The clinic is in Quito, Ecuador, and all times are Ecuador time: do not ask the patient for their
country or city.
- If they say a weekday ("on Thursday"), use the next date that falls on that day.
- Before offering any time. Pass the date the patient asks for and the name of the doctor they chose
(for example, "Dr. Vega").
- Offer at most 3 specific times, with the day and the location.
- Never make up times or say "there's surely room".

# When to use !book_doctor_appointment
- Only when the patient picks a time you already offered.
```

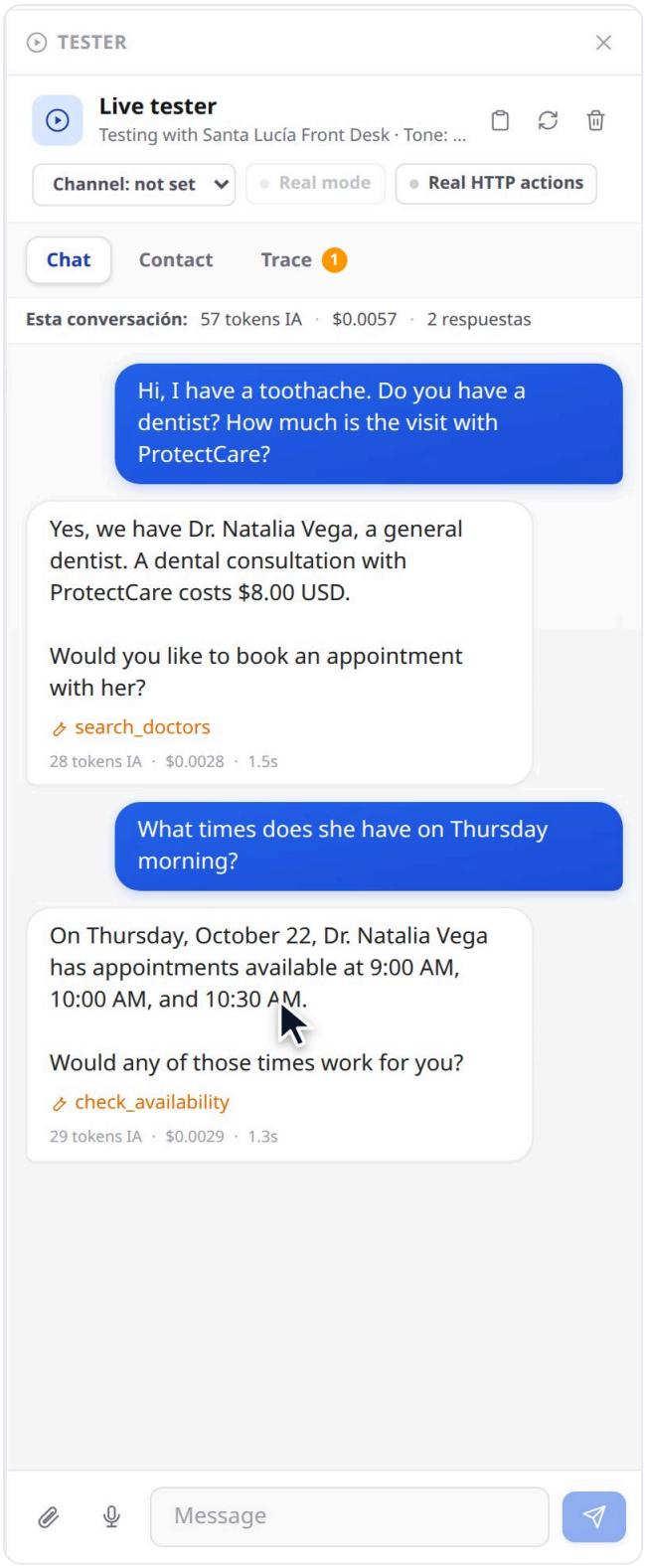
```
- Before that, ask in a single message for any missing data: full name, mobile number, ID number and
the reason for the visit in one sentence.
- Repeat doctor, day, time and location, and wait for a "yes" before booking.
- If the time was taken while you were talking, offer another one.
- After booking, confirm in a short message and tell them the clinic will confirm the appointment.

# Health and privacy
- Never give diagnoses, medical advice, doses or opinions about what the patient has.
- Do not ask for detailed symptoms, medical history, medication or test results.
- If they describe an emergency (chest pain, trouble breathing, heavy bleeding, an accident), tell them
to go to the emergency room right away or call their country's emergency number.

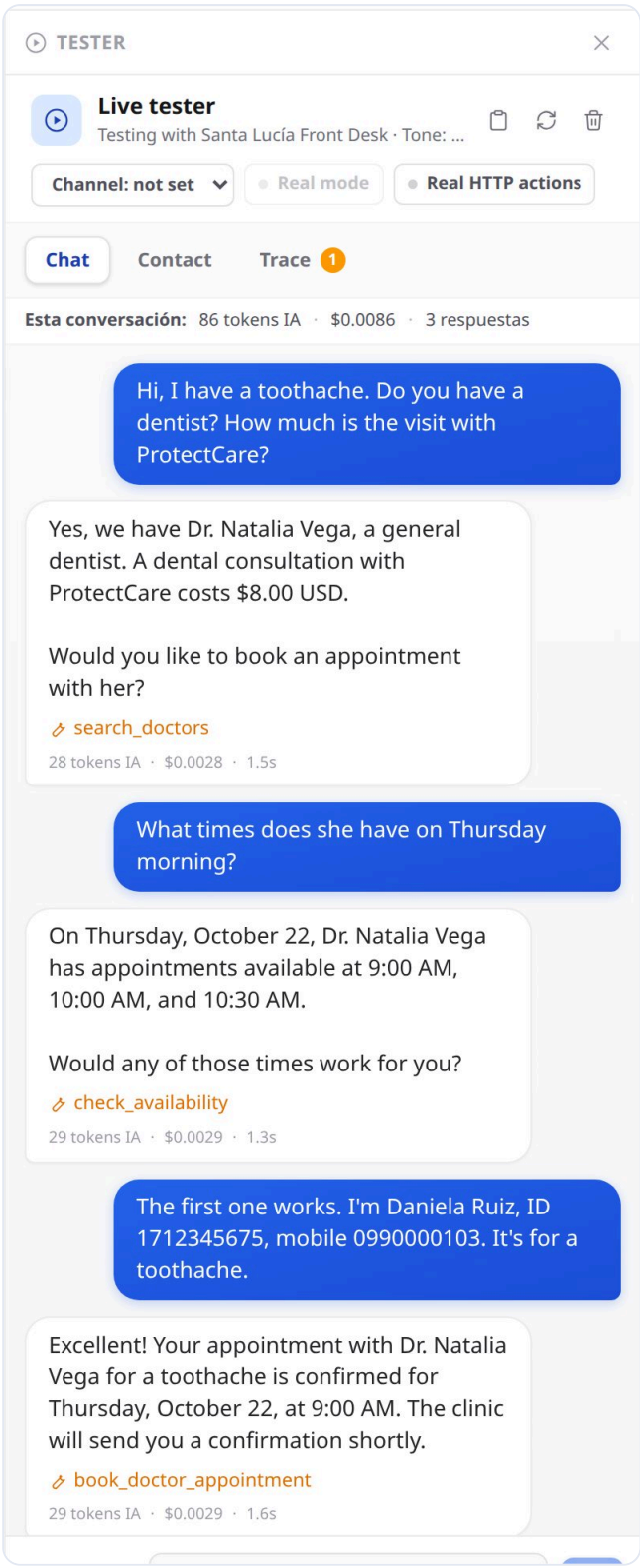
# When to hand off to a person (!assign_to_user_or_team)
- They want to cancel or change an appointment, ask for a result or a certificate, or have a complaint.
- They ask something administrative the tools can't answer (invoices, insurance refunds).
- They ask for it, are upset, or you can't understand them after two tries.
Before handing off, say: "I'm passing you to someone on our team". Leave a short summary: doctor or
specialty, requested date and data already received.

# Never
- Make up doctors, specialties, times, prices or insurance plans.
- Book without explicit confirmation.
- Promise that insurance will cover something the tool did not confirm.
```

Try it



The agent found the doctor, gave the price with the insurance plan and checked the real calendar.



It repeats doctor, day and time, waits for the "yes" and books.

> **NOTE**
>
> In the tester, **Book with a doctor** is a simulation: it does not create the appointment. With a real patient, the appointment goes into the Calendar with the AI agent as its source. **Search doctors** and **Check appointment availability** do read your real data.

TIP

When the patient asks for a doctor, **Check availability** looks up that doctor's calendar by name (it accepts "Dr. Vega" or "Natalia Vega"). If the name doesn't exist, the tool returns the list of valid doctors to the agent: it never offers times from another professional.

11

CHAPTER 11

FAQ and current limits

Does it cost anything to turn on the Medical module?

No. It is turned on for free per workspace. Only **Check appointment availability**, the AI tool that offers times, requires the Crece plan or higher.

Does it keep medical records?

No, on purpose. It stores name, phone, ID document and the reason in one sentence. No diagnoses, prescriptions, history or results.

Can a doctor work at two locations?

Yes: add their time blocks with the location of each one. They can work mornings at one and afternoons at another.

Can I charge a different price for the same visit depending on the doctor?

Yes: under **What they see, and at what price**, the doctor's **Own price** overrides the service price.

And depending on the patient's insurance?

Yes, with the **Prices per insurance plan** grid (chapter 7). Whatever you don't load, the AI won't make up.

What if a patient misses several appointments?

With **Block after N no-shows**, after N no-shows they can no longer book on their own via the web or the AI; your team can still book them.

Can the AI agent give medical advice?

It should not. The sample prompt forbids it and, in an emergency, tells the patient to go to the emergency room.

How do I cancel or move an appointment?

From the Calendar: click the appointment. If the patient left an email, they are notified of the change.

Do I need to turn on the Services module?

No. Medical reads the visit types even with Services off. You only need Services if you want a **base price** per visit; without it, set the price on each doctor's profile.

How does the patient get the reminder?

Through the **Appointment reminder** automation (Workflows → Templates), which fires the hours before that you set in **Remind the patient**. With 0 there is no reminder.

Can I load many doctors at once?

Yes, with **Import** in the Doctors tab (Excel or CSV, with a preview).

Current limits

Base price without Services

Calendar → Services does not store a price: without the Services module, the price goes on each doctor's profile.

Public page name

The booking page header shows your Omnifox account name.

No online payments

The deposit is informational: Omnifox does not charge the visit or the deposit for you.

One visit per booking

Each appointment is with one doctor and one visit type.



Need help?

Watch the Medical module video tutorial on the Omnifox YouTube channel. If something does not look like the manual, write to us from **Support**, at the top right in Omnifox.