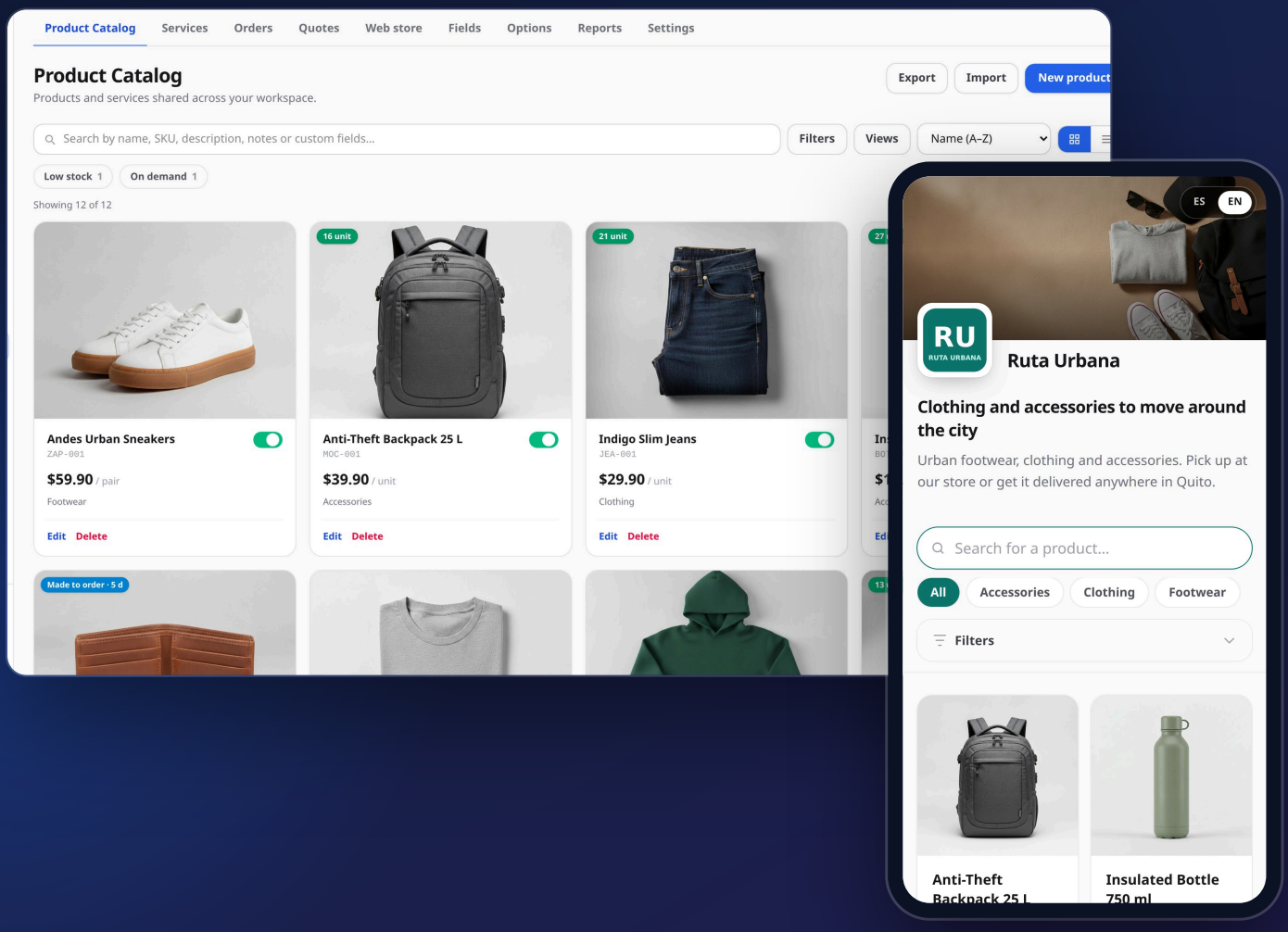
Omnifox

MODULE GUIDE

Products

A catalog with photos, prices and stock; orders, quotes, your web store, reports and an AI agent that sells on WhatsApp, Instagram, Messenger and your website chat.



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How to read this guide

The screenshots are real Omnifox screens with a sample business: **Ruta Urbana**, a clothing, footwear and accessories store in Quito, with eleven products, orders and quotes. 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 for this module on the Omnifox YouTube channel.

01

CHAPTER 1

What the Products module is

Everything you sell, in one place: the catalog your team, your web store and your AI agent all use.

The Products module organizes the full path of a sale: what you have and at what price, who ordered it, whether they paid and whether it was delivered. Because it lives inside Omnifox, the same information is used by your team in the conversations inbox, by the AI agent when it answers in chat, and by your web store, where customers build their own orders.

Catalog
Photos, price, tax, stock and variants

→

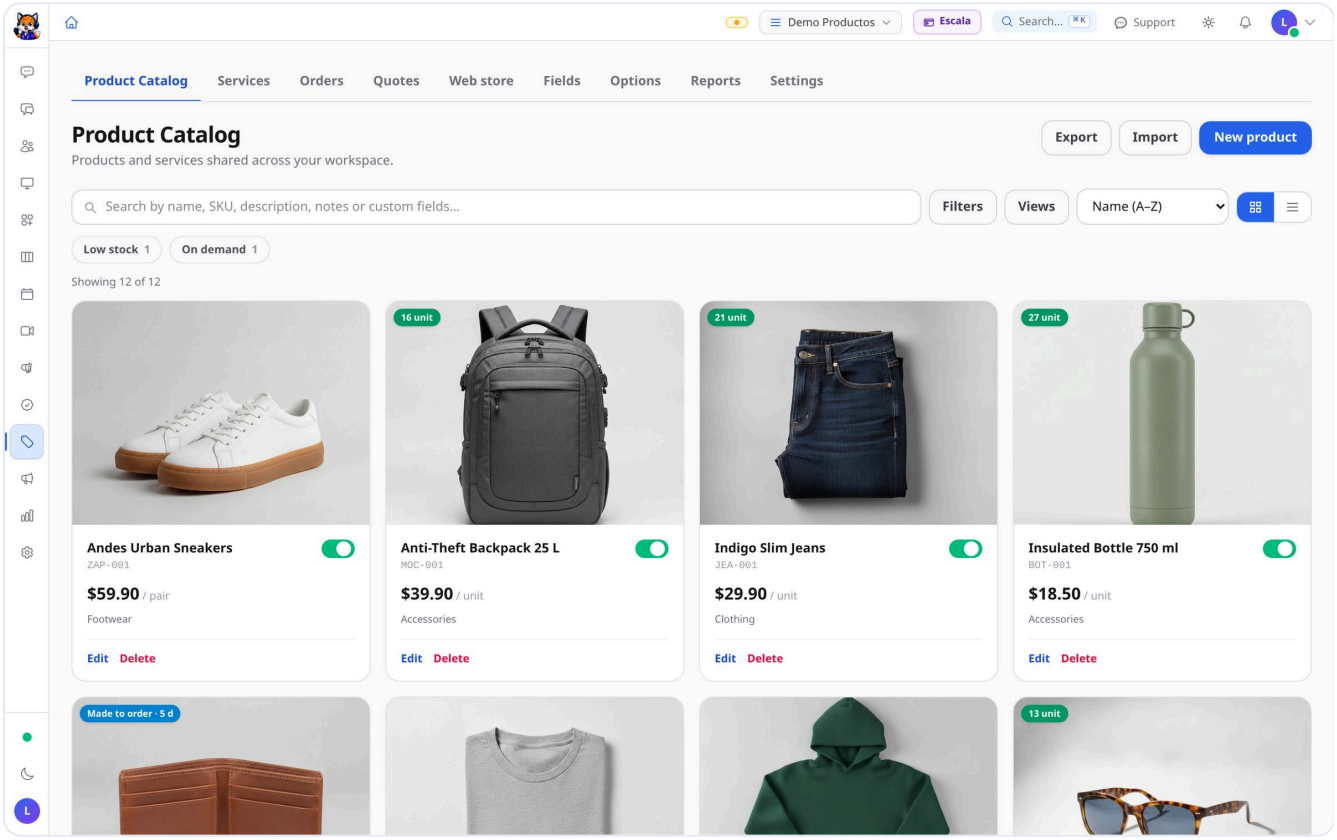
Channels
Web store, chat with your team or the AI agent

→

Order or quote
With amounts calculated by Omnifox

→

Reports
What sells, what people ask about and what is missing



The **Product Catalog** tab for Ruta Urbana.

The module tabs

Tab	What it is for
Product Catalog	Your products with photos, price, tax, stock and variants.
Orders	What needs to be confirmed, prepared, paid and delivered.
Quotes	Proposals with a public link, PDF and online acceptance.
Web store	Your catalog at its own address, with a cart and web orders.
Fields	Data specific to your business: material, size, voltage, warranty.
Options	What customers choose when ordering (extras, wrapping) and your delivery zones.
Reports	Best sellers, most asked about and what people ask for that you don't have.
Settings	How orders are confirmed, charged, delivered and how stock is tracked.

WHAT'S INCLUDED

Products is free on every plan and comes turned on by default; the web store (chapter 8) is available from the Impulsa plan. The **Services** tab next to Products is another catalog module, with its own guide.

02

CHAPTER 2

Turning the module on

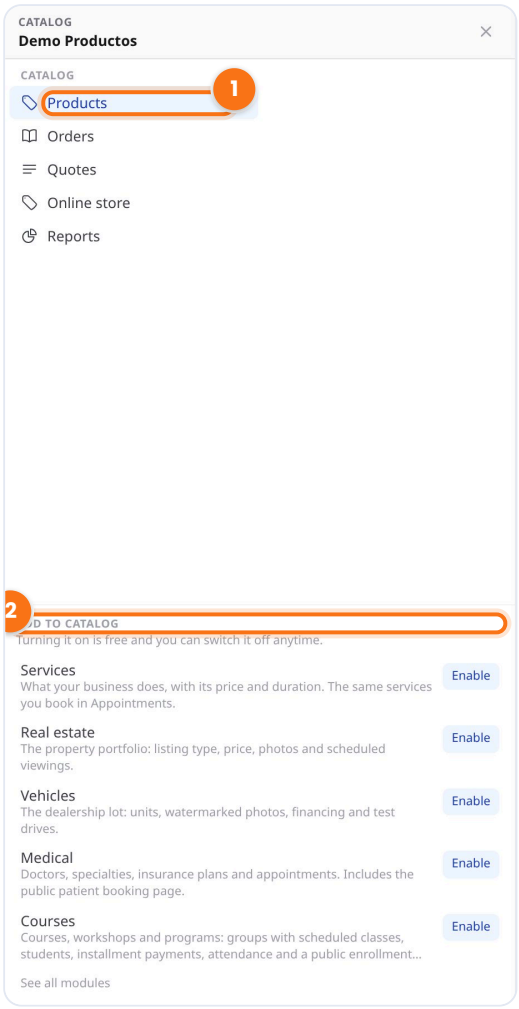
Products comes turned on. If someone turned it off, it comes back in one click and nothing you loaded is lost.

From the Catalog panel

1. In the sidebar, open **Catalog**.
2. At the bottom of the panel, under **Add to catalog**, you see the modules your workspace hasn't turned on yet.
3. Next to **Products**, click **Turn on**.
4. The **Products** entry shows up right away at the top of the panel, with Orders, Quotes, Web store and Reports.

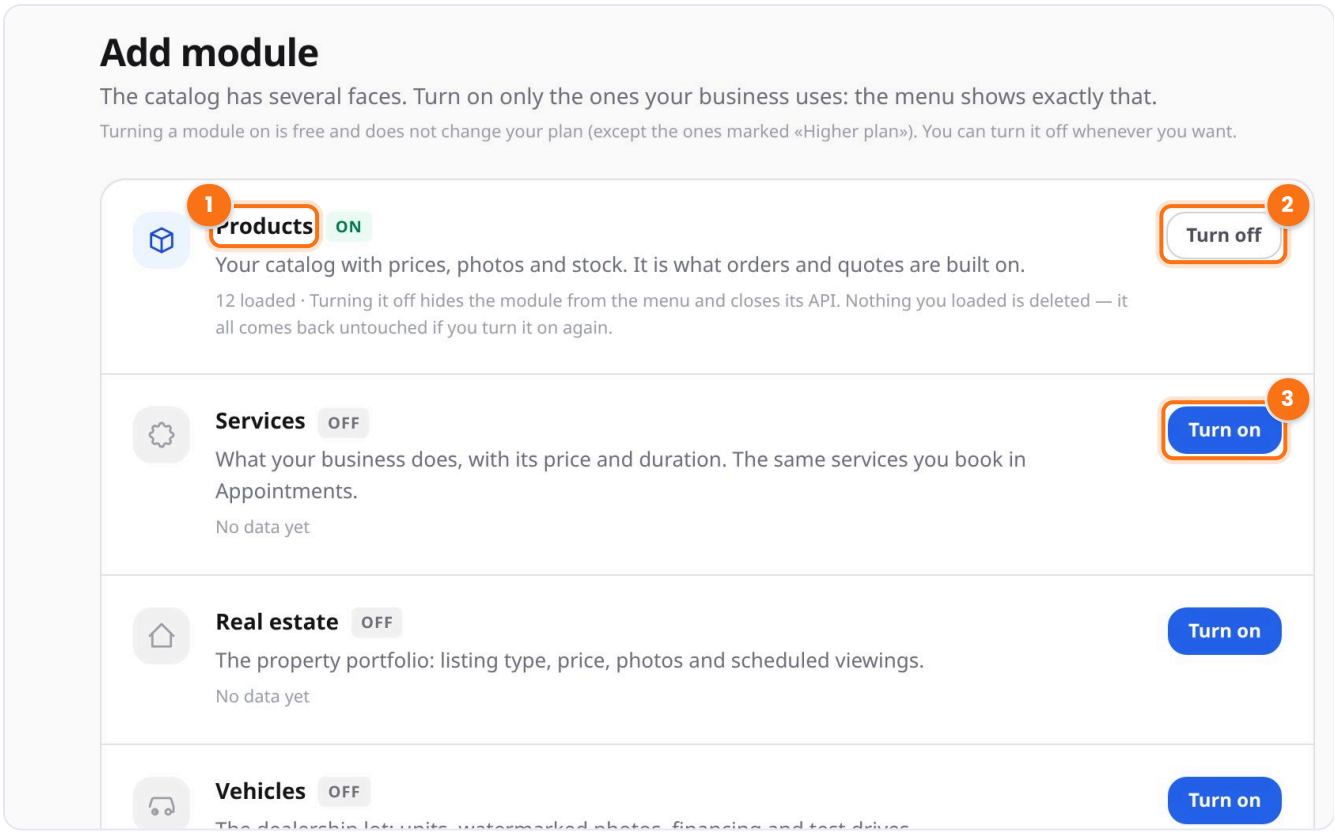
You can also go to **Catalog → See all modules**: there you see each module with its status and, to turn it off, the **Turn off** button.

> **NOTE**
>
> Turning modules on and off is done by the owner or an admin. If you have several workspaces, it is turned on in each one separately. Turning the module off hides it from the menu but doesn't delete products, orders or quotes.



The Catalog panel.

1. **Products**, already on.
2. Modules still off, each with **Turn on**.



See all modules: each face of the catalog with its status.

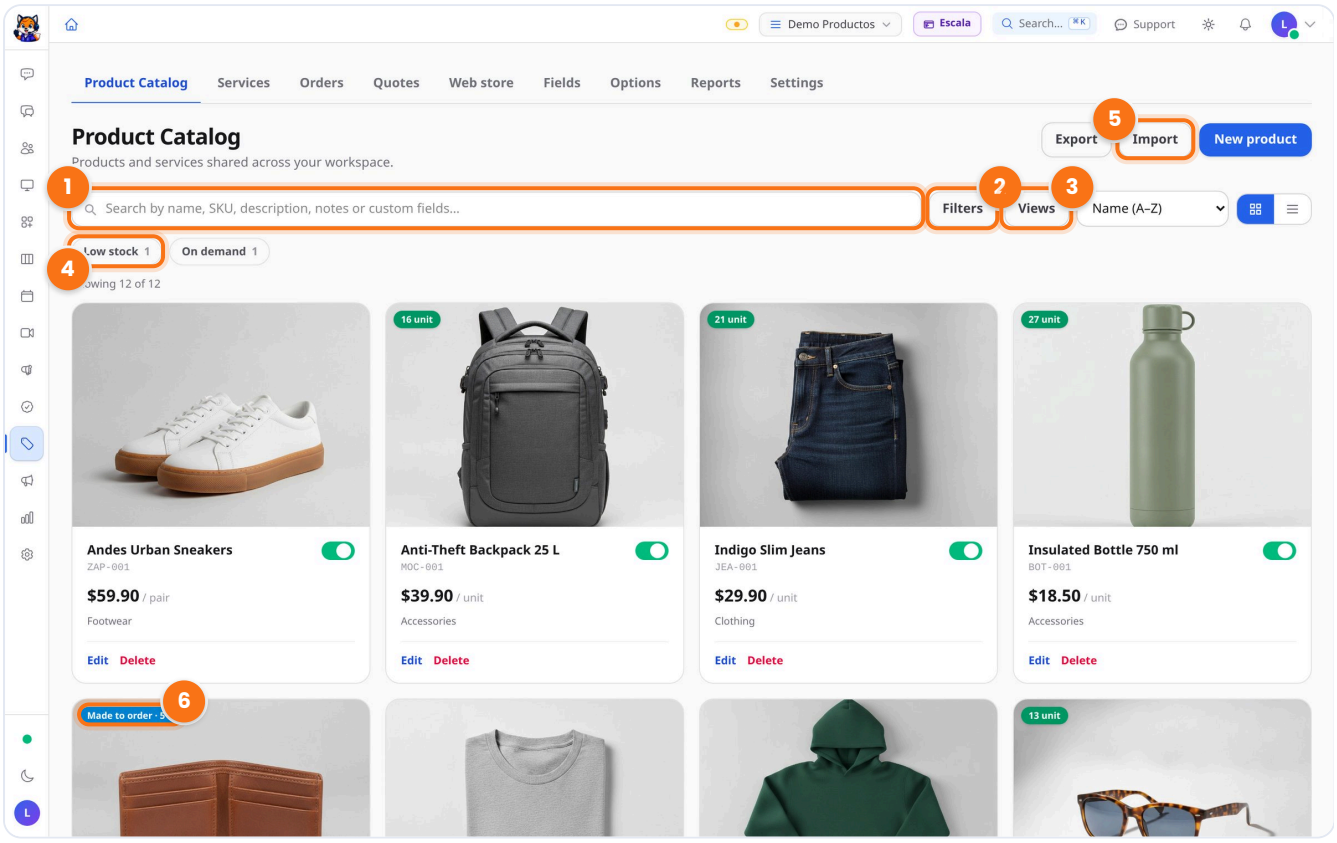
1. Products, on.
2. **Turn off** hides it without deleting anything.
3. Other modules turn on with one click.

03

CHAPTER 3

The catalog: search, filter and import

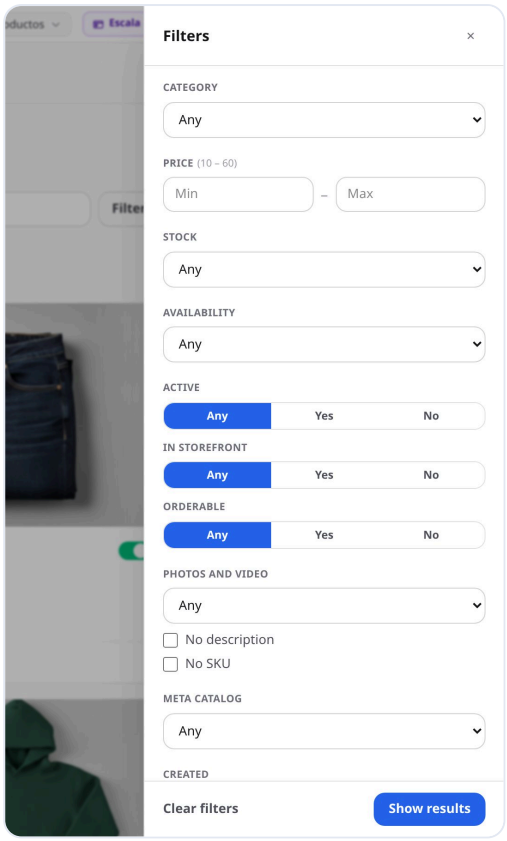
The main tab: all your products with photo, price and stock, plus tools to find them and change them in bulk.



1. Search: name, SKU, description, internal notes or custom fields.
2. Advanced **Filters**.
3. Saved **Views**.
4. Shortcuts: what needs attention.
5. **Import** and **Export**.
6. **Made to order** badge with lead time.

Search, filter and sort

- Search finds any word in the name, the code (SKU), the description, internal notes or your custom fields.
- The shortcuts on top (**Low stock**, **On demand**, **No photo**, **Not in store**…) appear only when there are products in that situation, with the count.
- **Filters** combines category, price range, stock (in stock, out of stock, low stock), availability, whether it is active or in the store, whether it has a photo or video, dates and your custom fields.
- The dropdown sorts by name, price, stock or date. The two buttons on the right switch between **Grid** and **Table**.
- In **Views** you save a named combination of filters, for yourself or shared with the team.



The **Filters** panel.

Bulk changes

In table view, tick several products and the action bar appears: **Activate** or **Deactivate**, **Publish to store** or **Remove from store**, **Mark available** or **Mark on demand**, **Change category…**, raise or lower prices with **% price**, and delete.

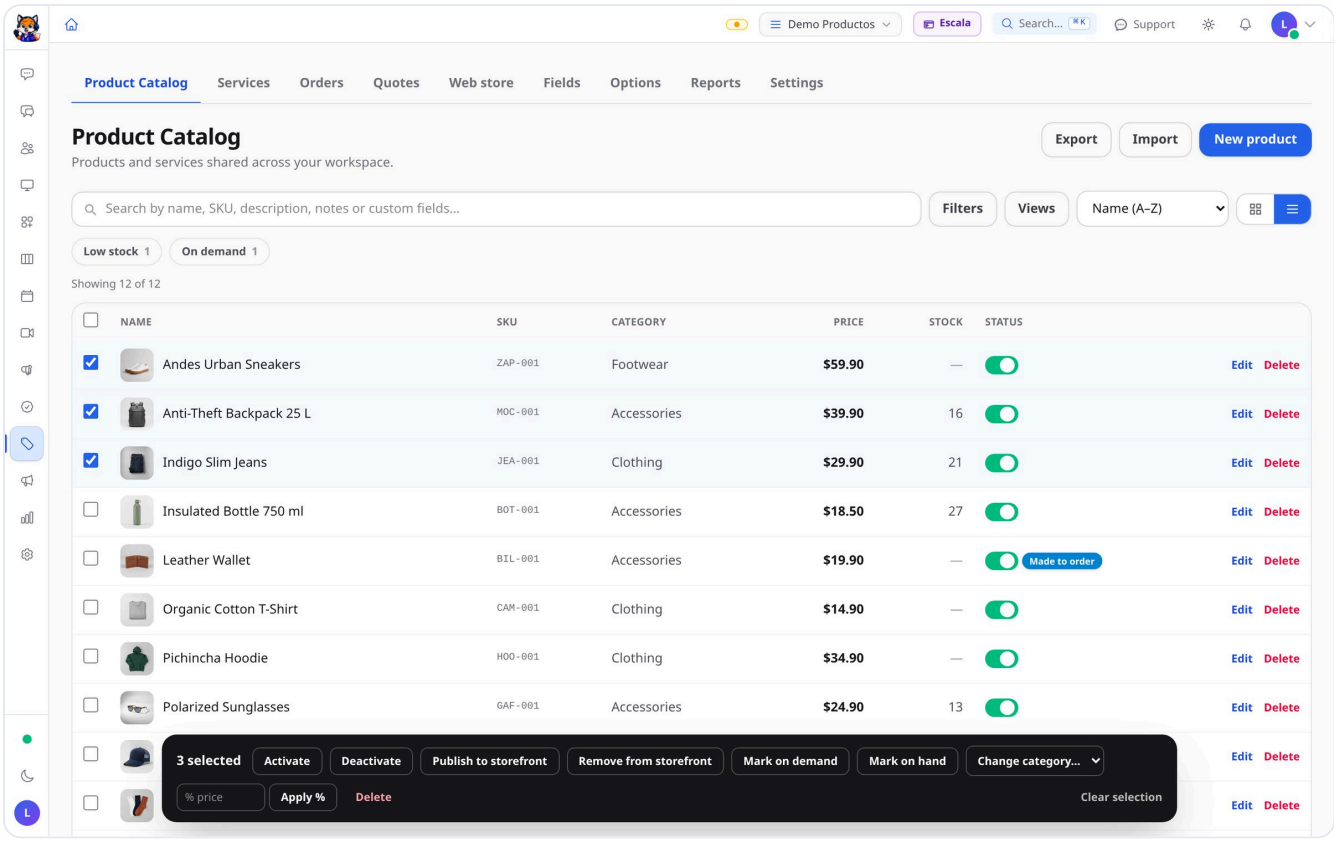
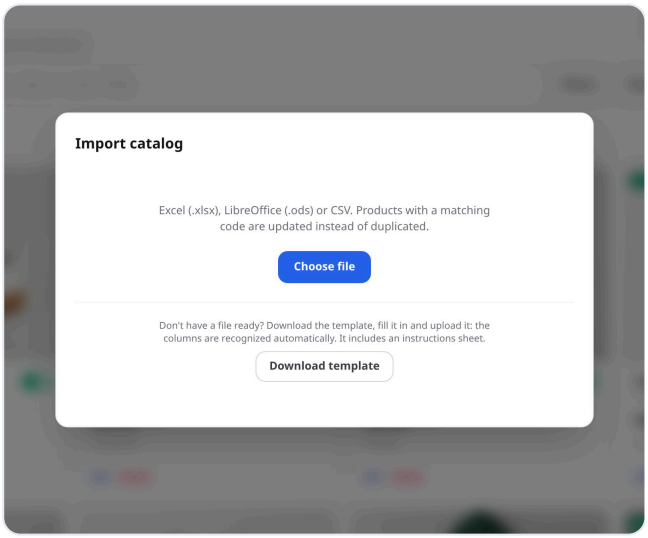


Table view with three products selected.

Import and export

1. Click **Import** and choose an Excel (.xlsx), LibreOffice (.ods) or CSV file. If you don't have one ready, use **Download template**: it includes an instructions sheet.
2. Check which field each column maps to: Omnifox recognizes them by name, including your custom fields.
3. Pick the file currency and click **Import**. If a product already exists with the same SKU, it is updated instead of duplicated.

Photos and documents provided as links are downloaded in the background. **Export** downloads a CSV with what you're viewing (it respects your filters), ready to edit and re-upload.



Import catalog.

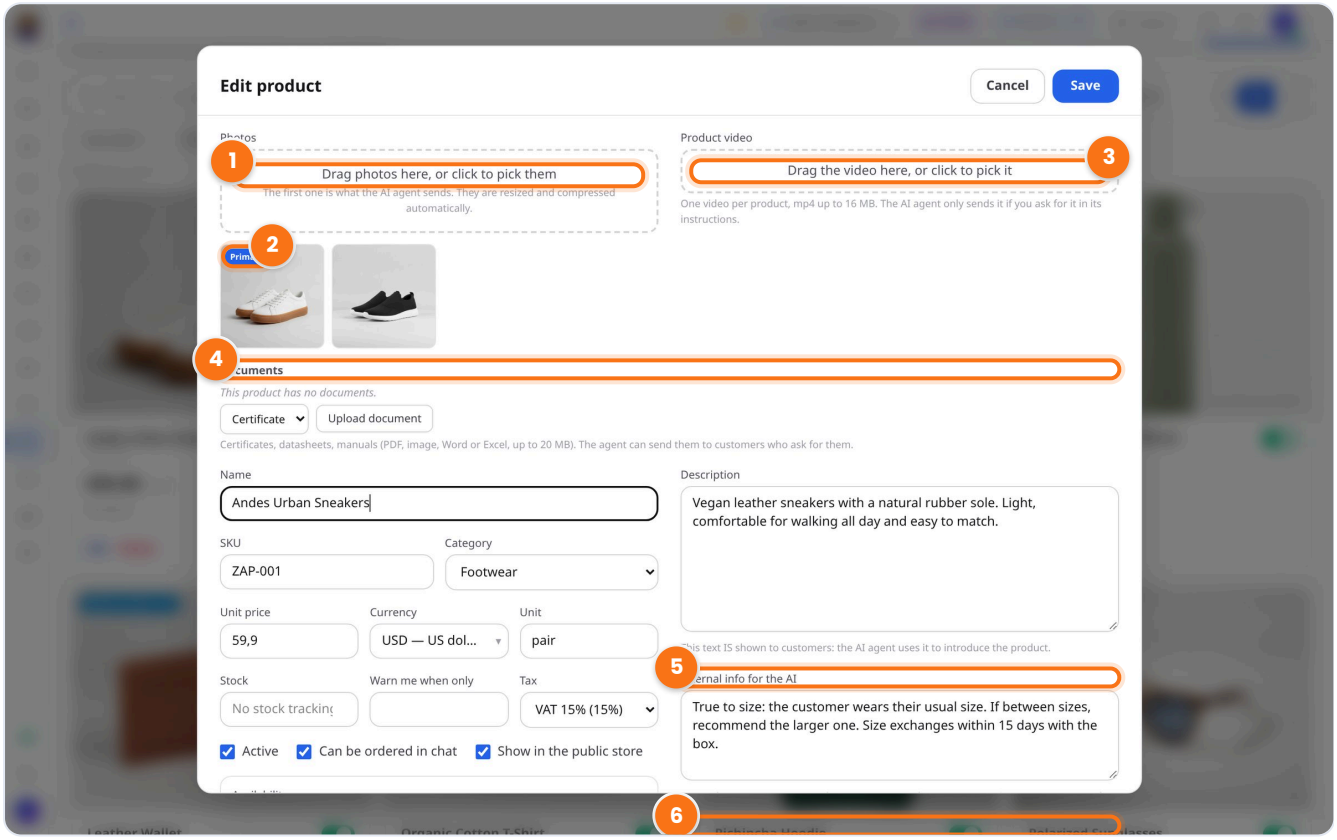
04

CHAPTER 4

Creating and editing a product

The product editor: everything the customer sees and everything your AI agent needs to know.

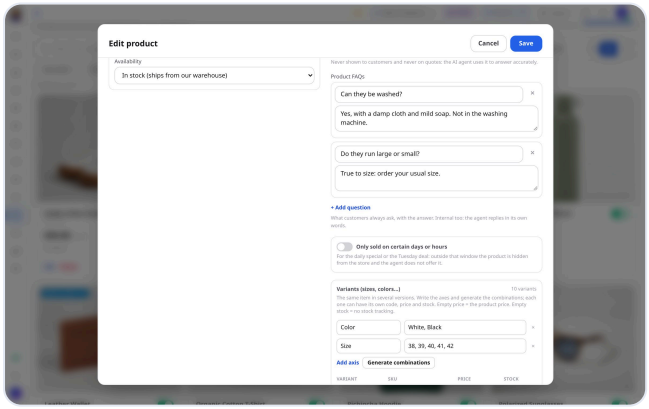
Click **New product** or **Edit** on a product card. The editor has two columns: hard data on the left, and what explains the product on the right.



1. **Photos**: drag them in, several at once. They are resized and compressed automatically.
2. The **Primary** one is the photo the AI agent sends.
3. One mp4 **video** up to 16 MB.
4. **Documents**: certificates, spec sheets, manuals.
5. **Internal info for the AI**: never shown to the customer.
6. **Product FAQs**, also internal.

Field by field

Field	What to enter
Name	The way customers ask for it. Enter it before uploading photos.
SKU	Your code. Leave it blank and it is generated automatically (e.g., RUT-00012). It is the key when re-importing and what the AI looks up by exact code.
Category	From your list; **New category** creates one right there. Subcategories are supported.
Unit price, **Currency**, **Unit**	The price shows like this in the store and in messages: “$59.90 / pair”.
Tax	From the workspace tax list (e.g., VAT 15%). Omnifox suggests the ones used in your country.
Stock	Empty = you don’t track stock (it is not zero). With a number, every confirmed order deducts from it.
Warn me when only	Low-stock threshold: the product shows up under the **Low stock** shortcut.
Active, **Can be ordered in chat**, **Show in public store**	Three separate switches: a product can be active for quotes but hidden from the store.
Availability	**In stock** or **Made to order**, with the **Lead time days** the agent tells the customer and the option **The business confirms before promising it**.
Description	Customers see it in the store and the agent uses it to present the product.
Internal info for the AI	What the agent should know but not show: “the cable is included; the power bank is not”.
Product FAQs	Question and answer. The agent answers in its own words, without reciting them.
Only sold on certain days or hours	For a Tuesday promo or the menu of the day: outside that window it doesn’t appear in the store and the agent doesn’t offer it.



Availability, switches and selling hours.

Create a product in a minute

1. Click **New product** and type the **Name**.
2. Enter the **Unit price**, pick the **Category** and, if you track stock, the **Stock**.
3. Write the **Description** and drag in the photos.
4. Click **Save**. If it is active and published, it shows up in the store, in quotes and for the AI agent.

TIP

Photos are served from Omnifox’s own non-expiring link: the one the agent sends on WhatsApp keeps working months later.

05

CHAPTER 5

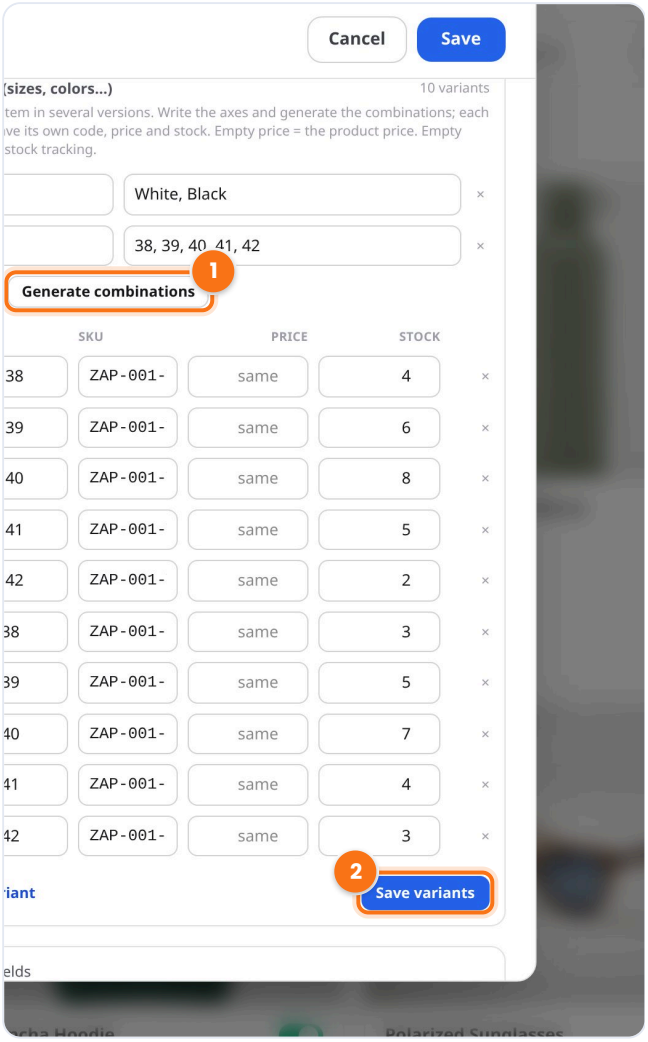
Variants and custom fields

The same item in several versions, and the data specific to your business.

Variants (sizes, colors…)

1. In the product editor, scroll to **Variants**.
2. Type each axis and its comma-separated values: *Color: White, Black · Size: 38, 39, 40, 41, 42*. **Add axis** adds another one.
3. Click **Generate combinations**: all of them appear (here, 10).
4. Fill in each one's stock and, if different, its price or code. Empty price = the product price; empty stock = not tracked.
5. Click **Save variants**.

- Regenerating doesn't delete: what you already loaded keeps its price and stock.
- In the store the customer picks color and size; a variant with stock 0 can't be ordered.
- The order stores the chosen variant ("Black / 40") and deducts its stock.

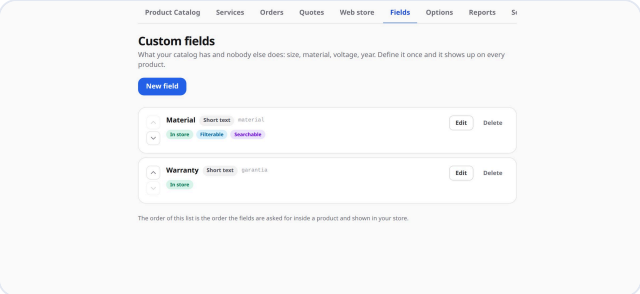


1 **Generate combinations.** 2 **Save variants.**

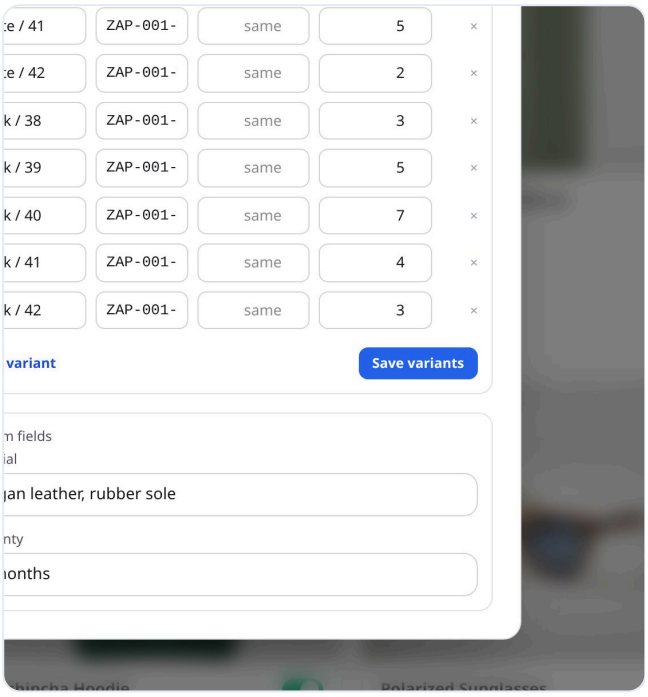
Custom fields

In the **Fields** tab you define, once, the data specific to your business (material, warranty, voltage, year), and they appear in every product form. For each field you choose, separately:

Option	What for
Show in store	The customer sees the value on the product page. Internal cost: off; material: on.
Filterable	Shows as a filter in the store (for option lists, like size).
Searchable	Anyone typing that value in search finds the product.
Show on card	Shown in the grid, next to the price. Use it for one or two fields.
Required	A product can't be saved without it.



The **Fields** tab.



The fields in the product editor.

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CHAPTER 6

Options and delivery zones

What the customer decides when ordering, and where you deliver.

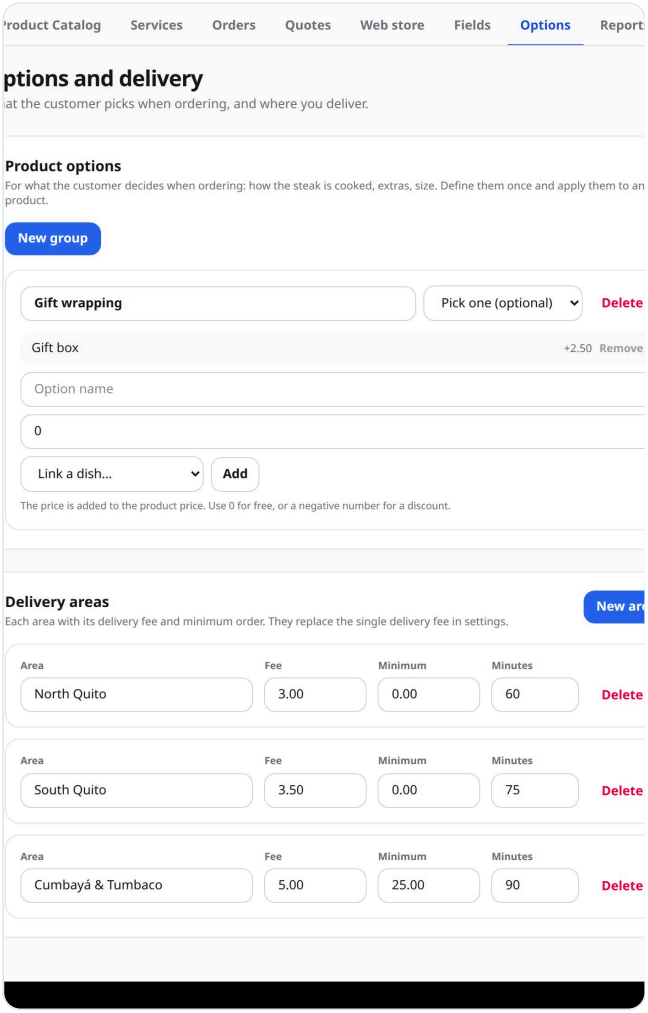
Product options

An option group is defined once and applied to the products you choose: a gift box, extras, how a steak is cooked. Each group can be:

- **Pick one (required)**, **Pick one (optional)** or **Add several**, with a maximum.
- Each option adds its price to the product (0 if free, negative for a discount).
- For combos, an option can be another catalog product.
- At Ruta Urbana, **Gift wrapping** (+$2.50) is offered on the sneakers, the sunglasses and the wallet.

Delivery zones

Each zone has its delivery fee, its minimum order and estimated minutes. They replace the single delivery fee in Settings; free delivery above an amount still applies. In the store, the customer picks their zone when ordering.



Options & delivery.

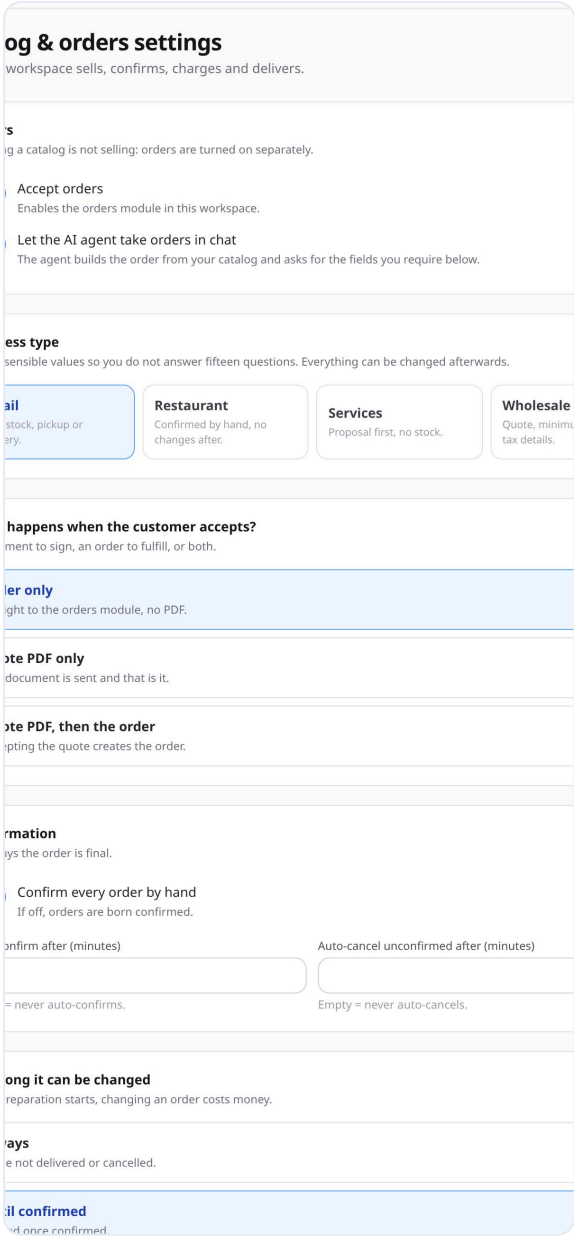
07

CHAPTER 7

Order settings

How this workspace sells, confirms, charges and delivers. Everything has a sensible default.

Section	What you decide
Orders	**Accept orders** and, separately, whether the AI agent can take them in chat.
Business type	Retail, Restaurant, Services or Wholesale: fills in typical values you can change later.
What happens when the customer accepts?	Order only, PDF quote only, or the quote and then the order.
Confirmation	Confirm every order by hand; auto-confirm or auto-cancel after X minutes.
How long it can be changed	Always, until confirmed, a window of minutes, or never.
Tax	No tax, each product's own, or one flat rate; and whether prices already include it.
Fulfillment	Delivery fee, free delivery from, minimum order.
Customer details required	Name, phone, address, email, tax ID. Without them the order can't be confirmed.
Stock	No tracking, informative only, managed here (deducts on confirmation and returns on cancellation) or from your own system via API. And whether out-of-stock items can be ordered.
Catalog lists	Categories and taxes you then pick on each product.
What gets created elsewhere	A CRM deal or a board card for each order.
WhatsApp/Facebook cart	What to do with the cart a customer builds inside WhatsApp or Facebook, and when to consider it abandoned.
Kitchen hours	When the store accepts orders, prep time and the closed message.
Numbering	Order prefix (RU-01001) and currency.



Catalog & order settings (top).

HEADS-UP

Accepting orders and letting the AI take them are two separate switches on purpose: letting a model close a sale must be an explicit decision.

TIP

Order amounts are always calculated by Omnifox from your catalog and taxes: neither the store, nor the API, nor the agent can send a different price.

08

CHAPTER 8

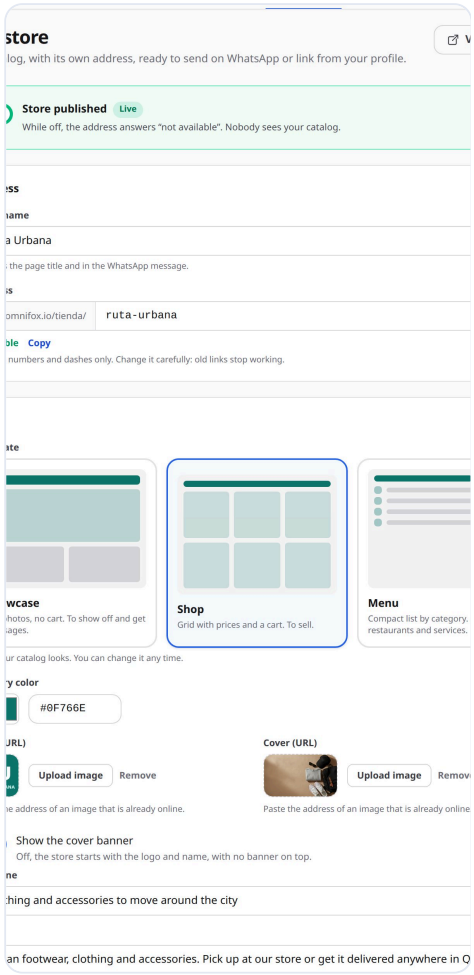
The web store

Your catalog at its own address, to share on WhatsApp or put on your Instagram. Customers build their cart and the order lands with you. Available from the Impulsa plan.

Set up and publish

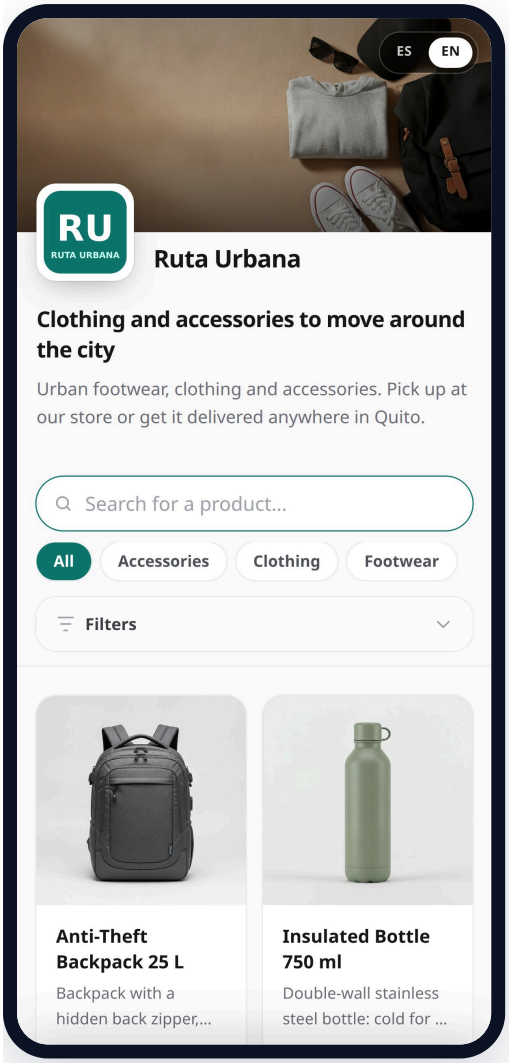
1. Go to **Catalog** → **Web store**.
2. Under **Address**, enter the **Store name** and choose the address (app.omnifox.io/tienda/...). Omnifox tells you if it is **Available**.
3. Under **Look**, pick the template: **Showcase** (big photos, no cart), **Shop** (grid with prices and cart) or **Menu** (list by category). Choose the **Primary color**.
4. Click **Save changes** (the store is created) and upload the **Logo** and the **Cover**. Write a **Headline** and an **Intro**.
5. Under **How people order**: **Take orders**, **Show prices**, **Ask for address**, saved-cart duration, currency and your **WhatsApp** (where the customer goes after ordering).
6. Under **Languages**, the default language and the ones visitors can choose (Spanish, English, Portuguese).
7. Turn on **Store published** and save. **View my store** opens it.

> **NOTE**
> Only **active** products with **Show in public store** turned on appear in the store. When off, the address replies “not available”.

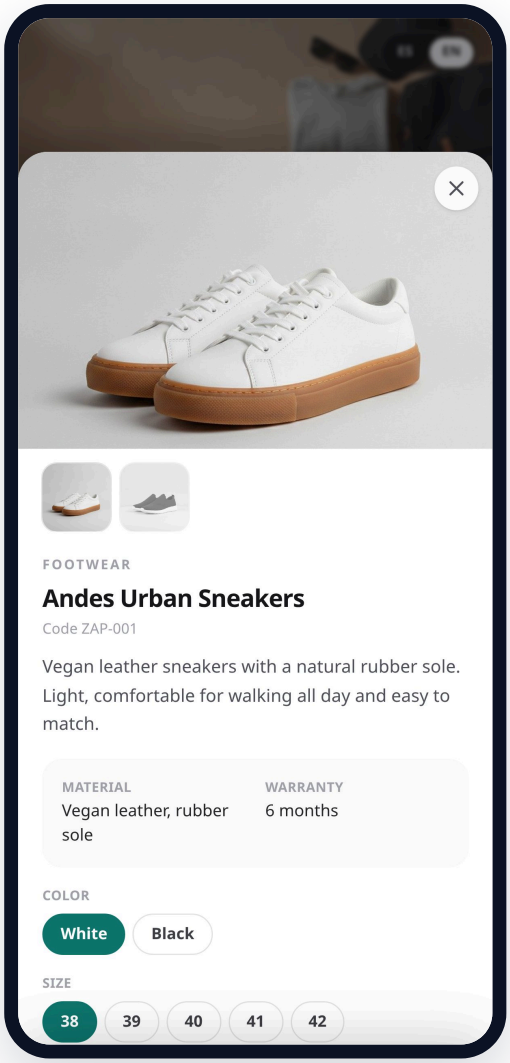


Web store: publishing, address and look.

What the customer sees

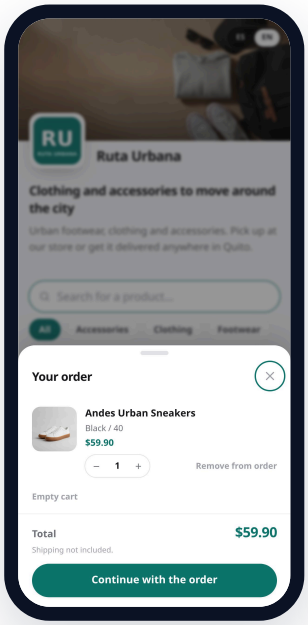


Ruta Urbana's store on a phone: logo, cover, search and categories.

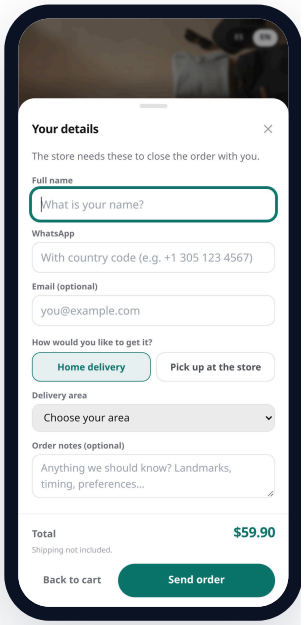


The product page: photos, price, variants, material and warranty.

- Search by words (it also finds close matches when there is a typo), filter by category, price, availability and your filterable fields.
- Compare up to four products and see "recently viewed".
- Picks variants and options; in the cart, store pickup or delivery (with zone), name, WhatsApp, optional email and notes.
- On sending, they get their order number and a **Continue on WhatsApp** button to arrange payment and delivery.
- The order lands in **Orders** with its contact created or matched by phone.



The cart.



Customer details.

TIP

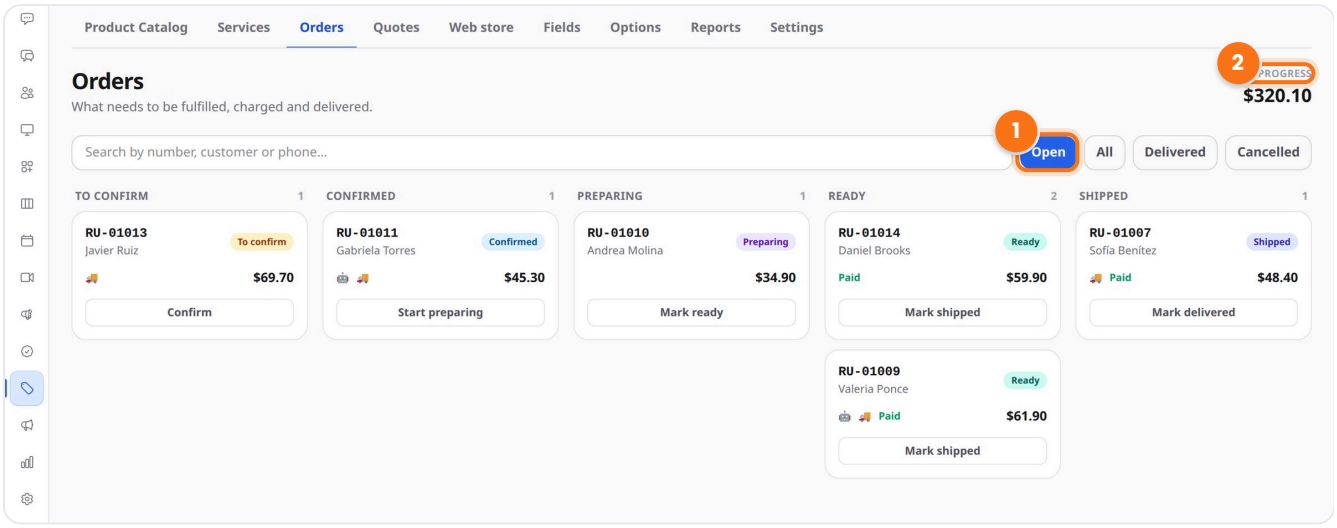
If the customer arrived through the link your AI agent sent, their cart is tied to that conversation: your rep sees it in the chat even before the customer sends it.

09

CHAPTER 9

Orders

What needs to be dispatched, charged and delivered, on a board by status.



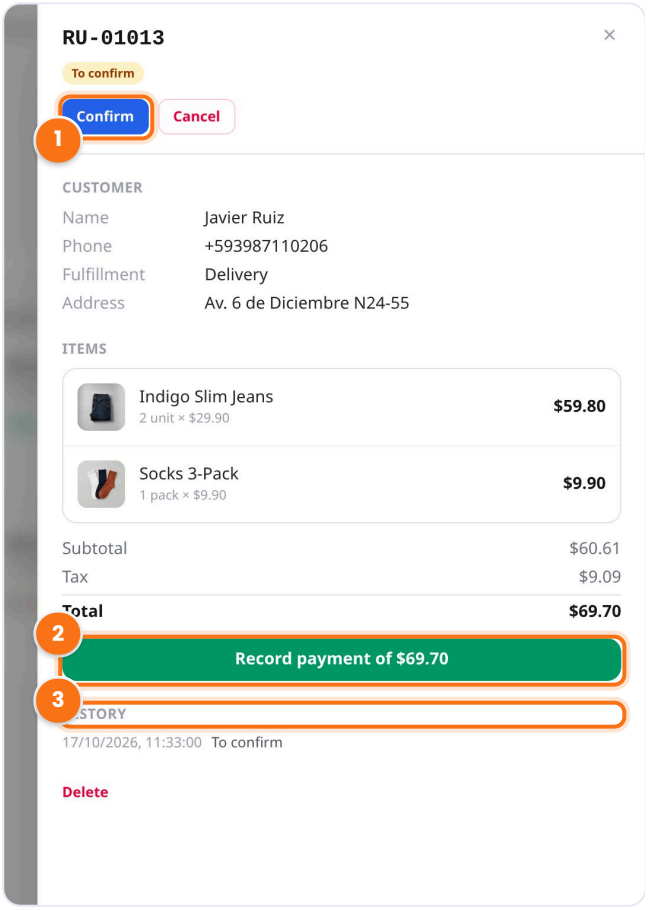
The **Orders** tab.

1. Filters: **Open**, **All**, delivered or cancelled, and search by number, customer or phone.
2. The value of what is **in progress**.

Statuses

Status	What it means
To confirm	It came in (store, chat, AI or API) and no one has reviewed it yet.
Confirmed	It's firm. With stock managed here, it is deducted at this point.
Preparing → Ready	Being prepared; ready for pickup or dispatch.
Shipped → Delivered	On its way; in the customer's hands.
Cancelled	With an optional reason; if stock was deducted, it is returned.

1. Open an order by clicking its card.
2. Check the customer, fulfillment, details (with the chosen variant), tax and total.
3. Move forward with **Confirm**, **Start preparing**, **Mark ready**...: only possible steps are offered.
4. When they pay, **Record payment**. Everything stays in the **History**.



1. Possible next steps.
2. **Record payment**.
3. **History**.

NOTE

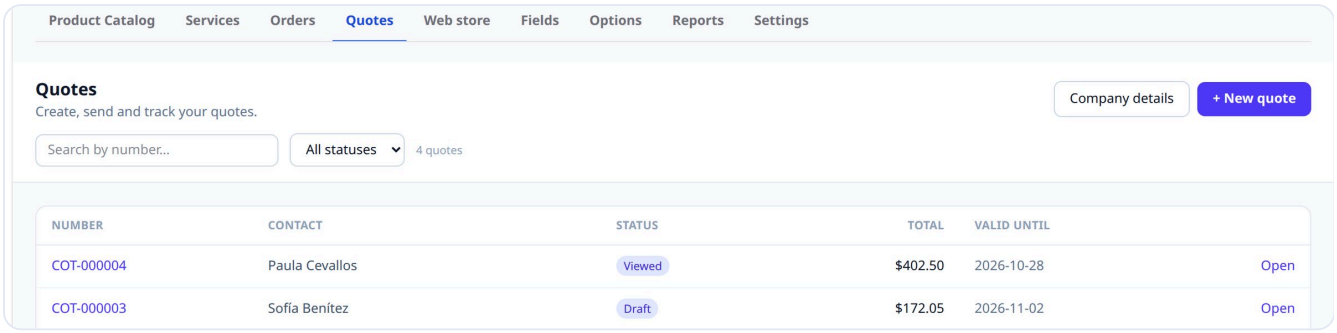
The robot icon on a card means the AI agent took the order; the truck means home delivery. An order can also trigger automation workflows and notifications to your system (webhooks) when it is created, confirmed, changes status, is paid or cancelled.

10

CHAPTER 10

Quotes

Proposals for companies, schools or large purchases, with a link to accept online.



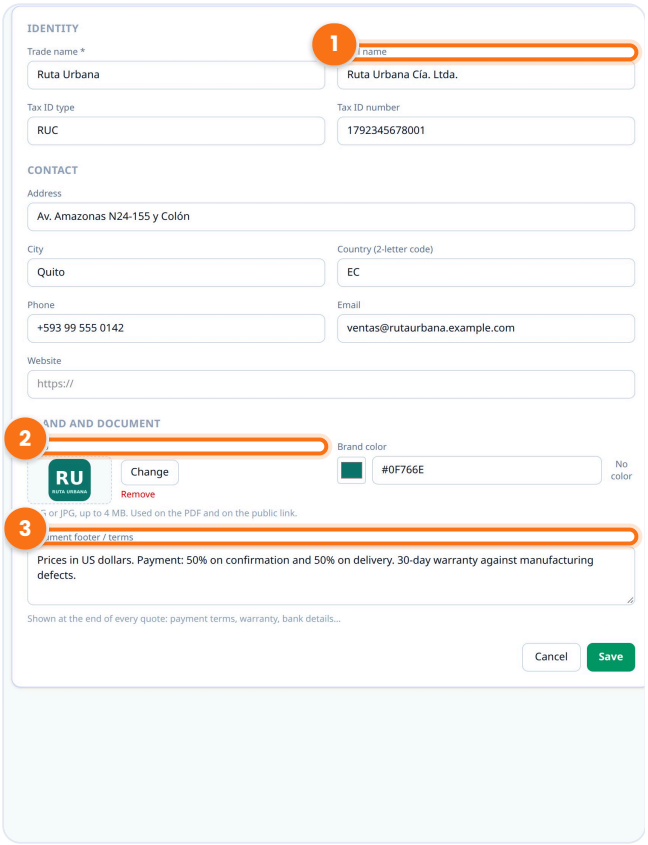
The **Quotes** list with their status.

Company details (who issues the quote)

Before your first quote, open **Quotes → Company details** and click **Edit**. This is the information every quote goes out with, in the PDF and in the link the customer receives. Omnifox creates a profile with your organization name; complete it:

1. **Identity**: trade name, **legal name**, ID type (RUC, NIT, RFC, EIN...) and number.
2. **Contact**: address, city, country (2-letter code), phone, email and website.
3. **Brand and document**: **logo** (PNG or JPG, up to 4 MB), brand color and the **document footer** with your payment terms, warranty or bank accounts. **Save**.

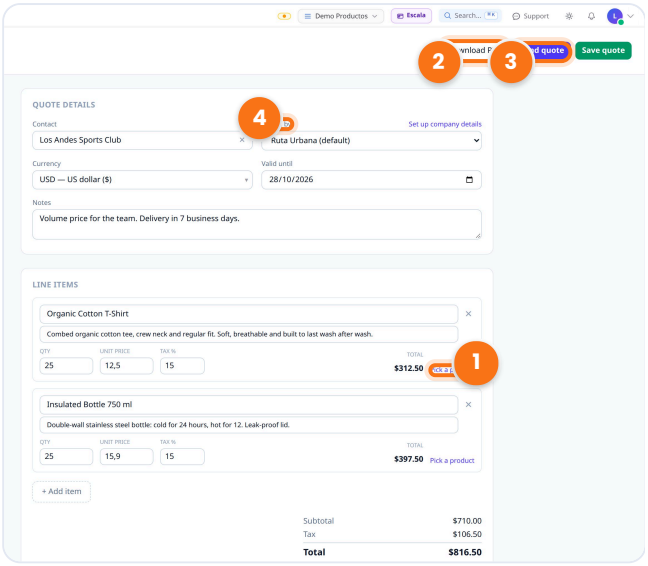
> **NOTE**
>
> You can have several profiles (for example, two legal entities) with **+ New profile**; one is the **Default**. While a quote is a draft it uses the profile's current data; once it is sent, accepted or rejected, that data is frozen in it. Only the owner or an admin can change them.



1 Legal name and tax ID.
2 Logo and brand color.
3 Document footer / terms.

Create and send a quote

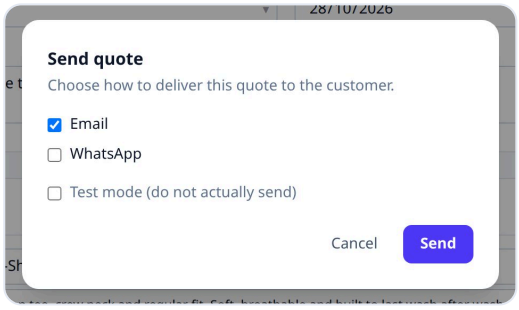
1. Click **+ New quote**.
2. Choose the **Contact**, the **Currency** and the **Valid until** date. **Issued by** already shows your default profile (change it if you have several). Add **Notes** if needed.
3. On each line, tap **Pick a product**: name, description, price and tax fill in automatically. Adjust quantity and price; **+ Add line** adds more. If Services, Real estate, Vehicles or Courses are also on in the workspace (and have data), the picker shows a tab for each.
4. **Save quote**. From there: **Download PDF** or **Send quote**.
5. When sending you choose **Email** and/or **WhatsApp**. **Test mode** shows the result without sending anything.



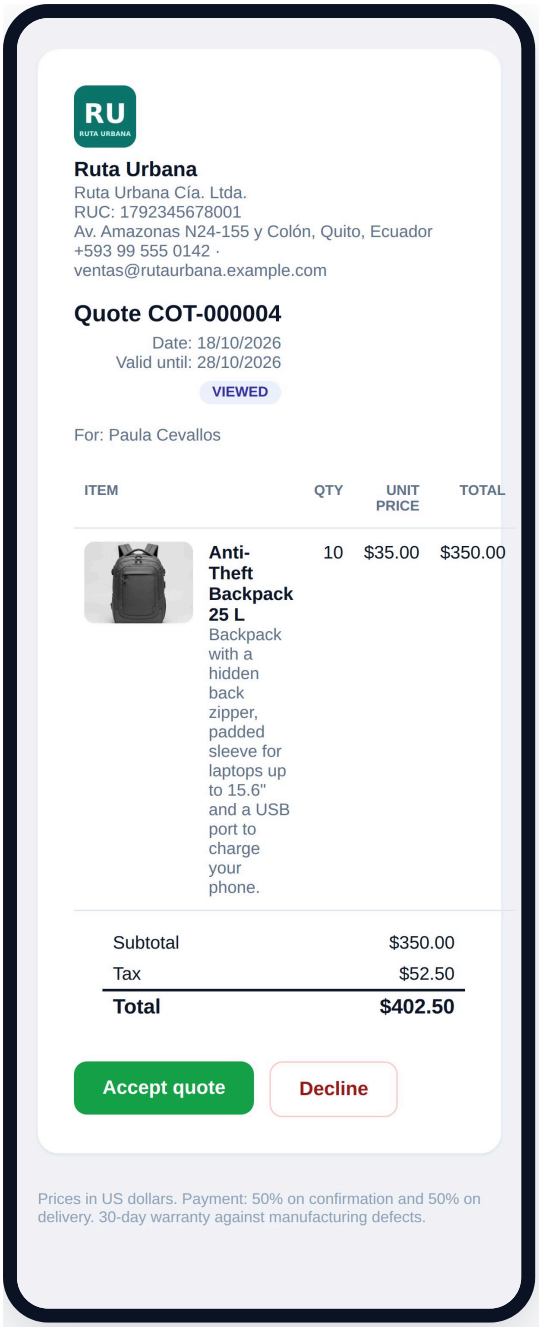
1. **Pick a product** from the catalog.
2. **Download PDF**.
3. **Send quote**.
4. **Issued by**: the Company details profile.

The customer opens the link, views the quote, downloads it and **accepts** or **rejects** it; the status updates automatically (it is also marked **Viewed**). You can set it by hand with **Mark accepted** or **Mark rejected**. An accepted or rejected quote can no longer be edited.

> **HEADS-UP**
>
> In a quote, each line's tax is added on top of the unit price you enter. If your catalog prices already include VAT, check the line price before sending.



Sending, with **Test mode**.



What the customer sees when opening the link: your logo, your details, the lines, the total, the buttons to accept or reject and your terms at the bottom.

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CHAPTER 11

An AI agent that sells

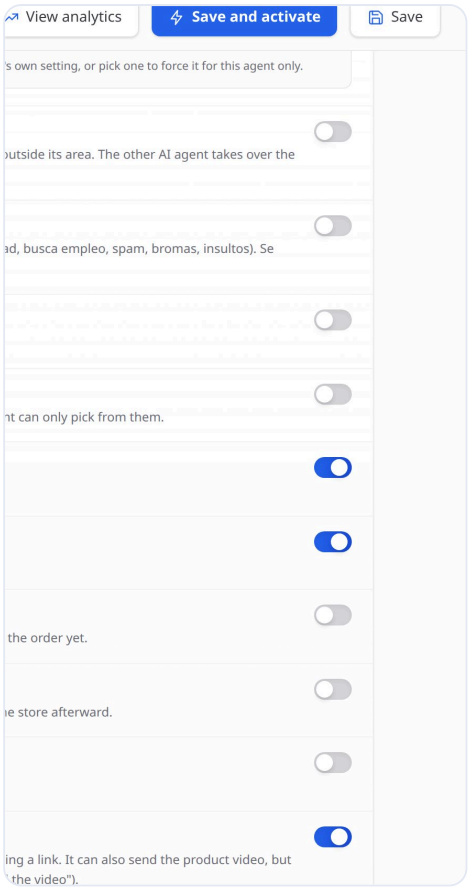
An agent that answers with real prices and stock, sends the photo, shares the store link and writes down the order, on WhatsApp, Instagram, Messenger and your website chat.

Catalog tools

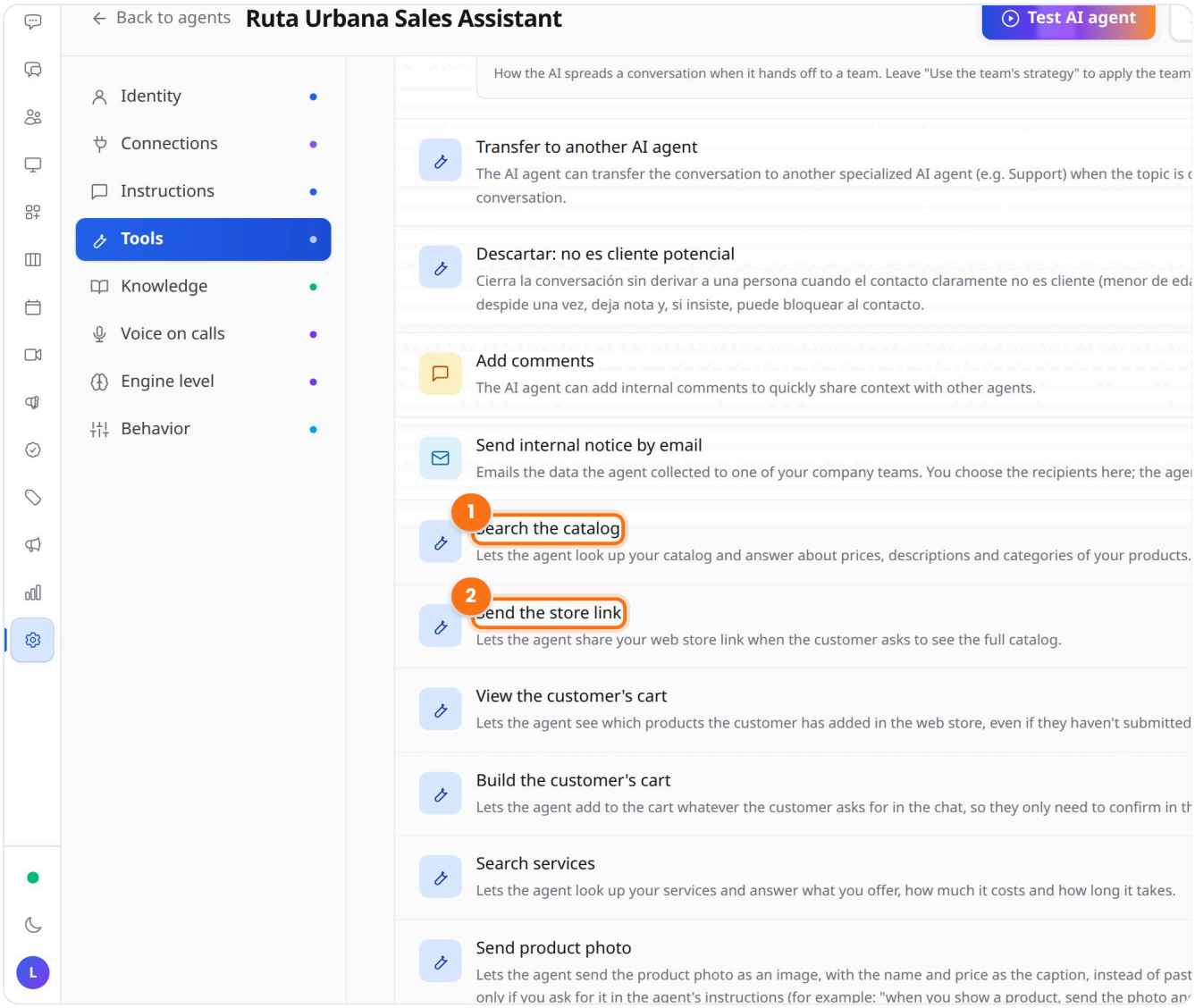
Tool	What it does
Search the catalog `search_products`	Searches by name, code, description and category (word by word and accent-insensitive) and returns price, stock, variants, internal notes and FAQs.
Send product photo `send_product_photo`	Sends the primary photo (or the video). It turns on with search; you can turn it off.
Take orders `create_order`	Creates the order: the agent says what and how many; the price comes from the catalog. Requires the AI ordering switch in Settings.
Send the store link `send_catalog_link`	Shares your store with a cart tied to the conversation.
Check / Build the customer cart	Reads or fills the cart the customer built in the store.
Send quotes `create_quote`	Builds and sends a quote with catalog products.

Step by step

1. Go to **AI Agents**, click **Create AI agent** and choose **Start blank** (or a template, like “Catalog Salesperson”).
2. Under **Identity**, give it a name and check the agent’s **Language** (a blank agent starts in Spanish: switch it to English).
3. Under **Instructions**, paste the sample prompt and adapt it.
4. Under **Tools**, turn on the catalog tools you want and **Assign to agent or team**. Save.
5. Try it in the **Live tester**: there, actions that change data (like creating the order) are simulated; the catalog search is real.
6. Under **Connections**, choose the channels it answers on.



The tester: real catalog search and a simulated order.



The agent's **Tools** tab.

1. **Search the catalog.**
2. **Send the store link.**

Sample prompt: store salesperson

Paste it into **Instructions** and change the business name, city and anything else you need. Tools are named with a **!** in front, as in the editor.

```
# Role
You are the sales assistant for Ruta Urbana, an urban clothing, footwear and accessories store in
Quito. You answer on WhatsApp, Instagram, Messenger and the website chat. Your goal is to understand
what the person is looking for, show them what we actually carry and get the order written down.

# Tone
- Warm, clear and upbeat. Friendly and direct.
- Short messages: 1 to 4 lines. One question per message.
- Reply in the language the customer writes in.
- An occasional emoji is fine; a row of emojis is not.

# When to use !search_products
- ALWAYS before naming a product, giving a price or talking about sizes, colors or stock.
- Search with the customer's words in the query (e.g. "white sneakers") and leave the category empty.
- If it isn't in the catalog, it doesn't exist: never invent products, prices, lead times or
promotions.
- If there are several options, show 3 at most, each with name and price on one line.
```

```
- If what they ask for isn't there, say so plainly and offer the closest thing you do have.

# When to send the photo (!send_product_photo)
- When the conversation lands on ONE product: they name it, ask about it or pick it.
- One photo per product, no repeats, and never paste links.

# How to take the order (!create_order)
- Confirm product, size or color, quantity, and whether they pick up at the store or want delivery.
- Ask for name and phone if you don't have them; for delivery, the address too.
- Repeat the summary and wait for a "yes" before creating the order.
- Then give the order number and the exact total the tool returns. Don't add it up yourself and never
invent an order number: if the tool doesn't return one, say the team will confirm it right away.

# When to send the store link (!send_catalog_link)
- When the person wants to browse the whole catalog, compare or build the cart on their own.

# When to hand over to a person (!assign_to_user_or_team)
- They ask for discounts, wholesale prices, a special invoice, an exchange or a return.
- There's a complaint, a payment problem, or the person asks to talk to someone.
Before transferring, let them know: "I'm handing you over to someone on the team who can help with
this."

# Never
- Invent products, prices, stock, sizes or delivery times.
- Offer discounts on your own.
- Ask for card details or passwords over chat.
```

- If you change prices or stock you don’t need to touch the prompt: the agent reads them from the catalog in every conversation.
- What you write in **Internal info for the AI** and in the product FAQs is used to answer without being shown.
- The tools keep working even if you turn the module off in the menu, so an agent already answering on WhatsApp doesn’t go silent.
- Each reply uses AI credits from your plan.

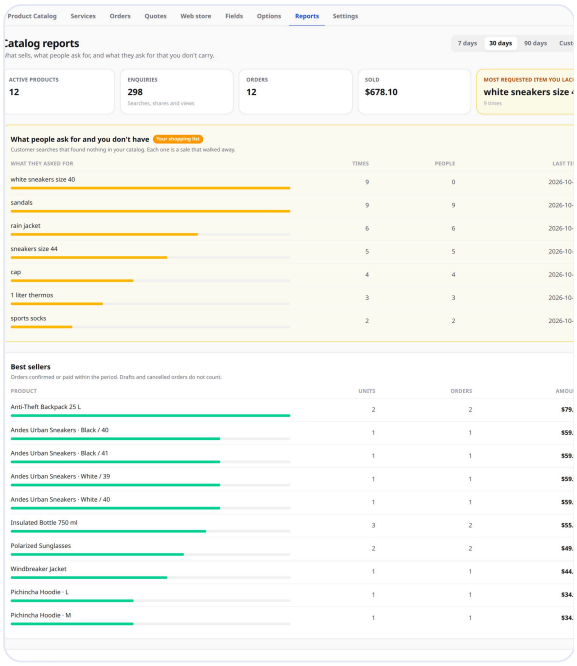
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CHAPTER 12

Catalog reports

What sells, what people ask about and what they ask for that you don’t have, for any period.

Report	What it shows
Top cards	Active products, enquiries (searches, cards sent and visits), orders, sales and the most-requested missing item.
What people ask for and you don’t have	Customer searches that found nothing: your shopping list.
Best sellers	Units, orders and amount (confirmed or paid orders).
Most quoted	Quotes, accepted and rejected.
Most asked about	Chat searches, cards sent and store visits.
Asked about, never bought	Interest that didn’t become an order: check price, photo or stock.
No movement	Active products nobody asked about or bought in the period.



Ruta Urbana’s **Catalog reports**, last 30 days.

TIP

Enquiries are logged automatically when your AI agent searches the catalog, when you send a product card from chat and when someone views a product in your store. Without the search tool on in your agent, what people ask for and you don’t have is lost.

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CHAPTER 13

FAQ and current limits

Most common questions and what the module doesn't do yet.

Current limits

No online payments

The store and chat don't take payments: there is no payment gateway. Customers pay through your usual methods and you record the payment on the order.

Meta catalog: coming soon

Sync with the WhatsApp and Instagram catalog is built and waiting for Meta's permission; in Settings it shows as "Coming soon".

Partial payments by hand

Payment is recorded on the order; there are no automatic payment reminders.

The tester simulates

In the agent tester orders aren't really created; to see a real one, connect the agent to a channel.

Frequently asked questions

Does Products cost anything?

No. Products is included in every plan; the web store, from the Impulsa plan. Only AI agent replies use AI credits.

What's the difference between "empty stock" and "stock 0"?

Empty means you don't track stock for that product; 0 means it is sold out.

When is stock deducted?

With stock **managed here**, when the order is confirmed (not when it is created); cancelling returns it.

Can the AI make up a price?

Order prices always come from the catalog, not from the model. The sample prompt also forbids naming products without searching first.

Can I hide a product from the store but still quote it?

Yes: keep **Active** on and turn off **Show in public store**.

How do I load hundreds of products?

With **Import** and the template. When you upload the file again, products with the same SKU are updated.

Can I connect my own system?

Yes: there is a REST API for products, orders, carts and quotes, order webhooks, SDKs, an MCP server and an n8n node. With **From another system** stock is checked live against your ERP.

In what language does the customer see the store?

In the store's default language, and they can switch to the ones you offer (Spanish, English or Portuguese).



Need help?

Write to us from **Support**, at the top right in Omnifox, or visit omnifox.io. If something doesn't look like this guide, let us know.