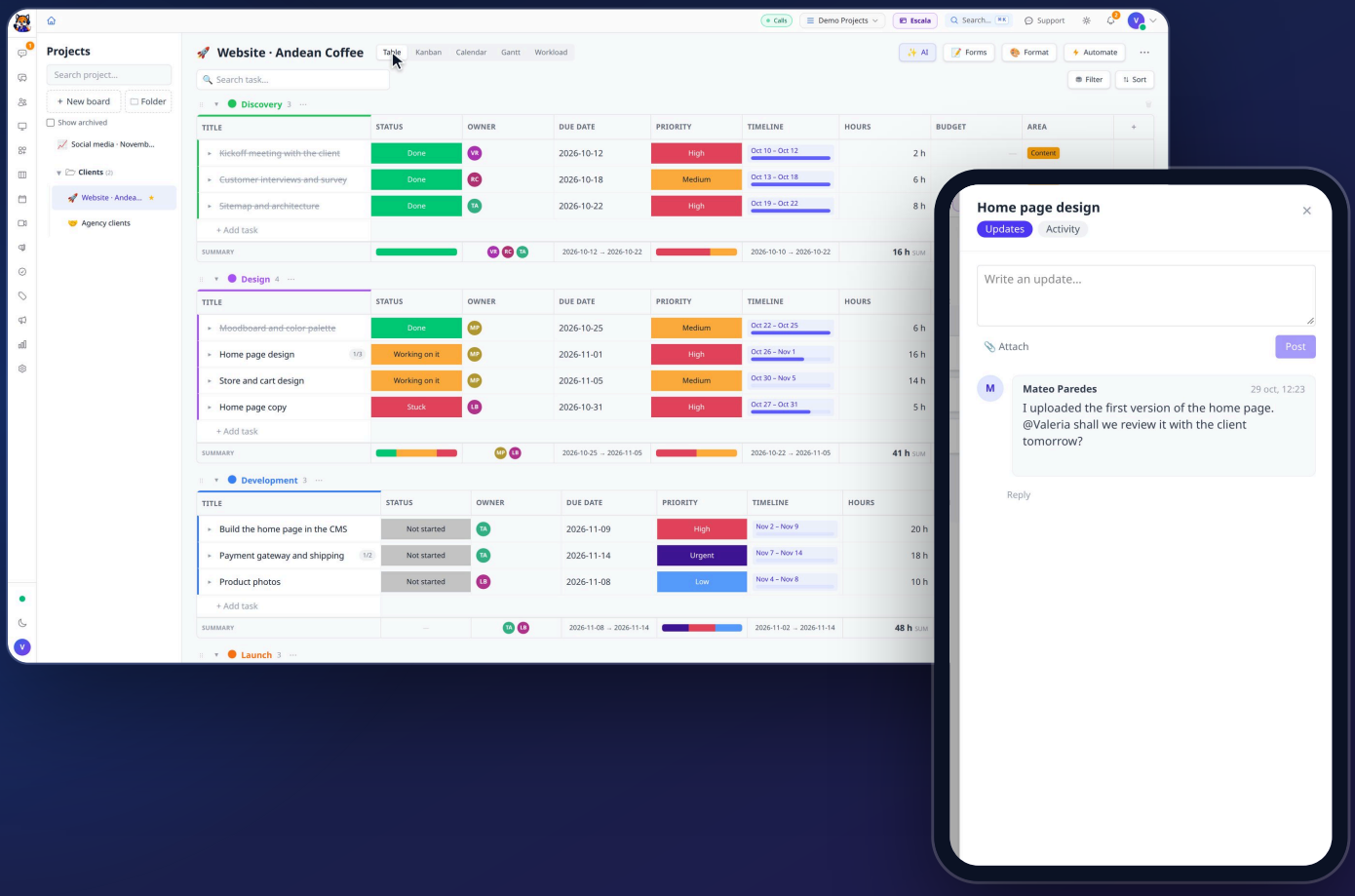
Omnifox

COMPLETE GUIDE · USER MANUAL

Projects

Boards to organize your team's work: groups, tasks and subtasks, 29 column types, formulas and connections between boards, five views, forms, automations, My tasks and the dashboard, right next to your conversations and your CRM.



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How to read this manual

The screenshots are real Omnifox screens with a sample business, **Estudio Nova**, a fictional creative agency in Quito that builds websites and runs social media for its clients. Its boards are **Website · Andean Coffee**, **Social media · November** and **Agency clients**, and in chapter 3 we create **Branding · Hotel Mirador** from the Client project template. The team: Valeria Ríos (the user in the screenshots), Mateo Paredes, Lucía Benítez, Tomás Aguirre and Renata Cruz. Clients and data are made up.

Button and field names are in **bold**, exactly as they appear on screen. This manual follows the order of the "Projects: complete guide" video on the Omnifox YouTube channel and expands it with every option, one by one. Projects depends on your plan (chapter 46). On screen two words mean the same thing: **task** and **item**, **subtask** and **subitem**.

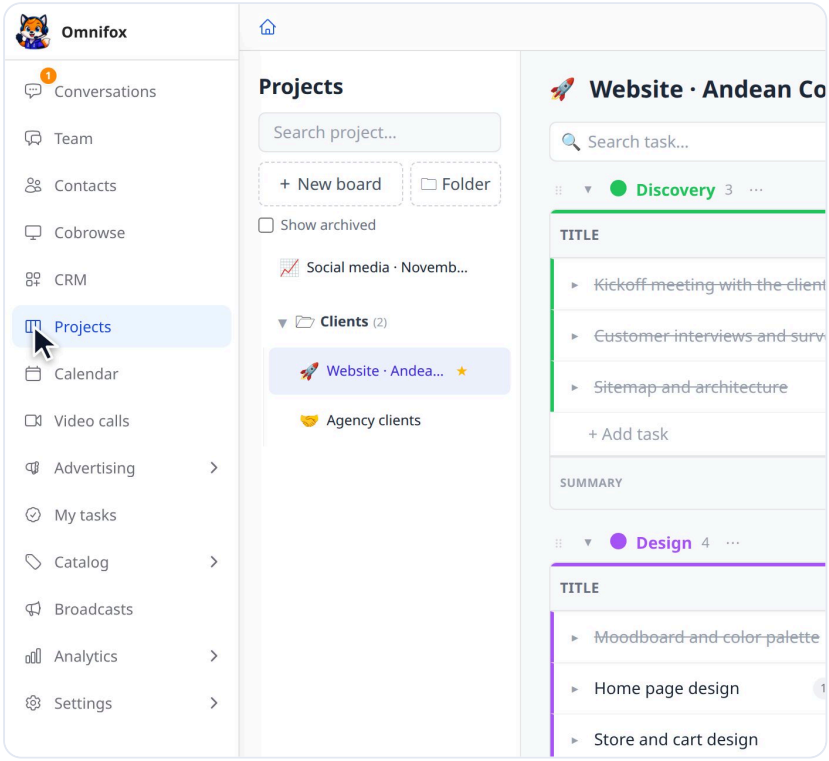
01

CHAPTER 1

Where to find Projects

The module to organize your team's work, one click away from your conversations.

Projects are boards that work like a spreadsheet with superpowers: each row is a **task**, tasks are arranged in **groups** (stages, weeks, areas) and each **column** stores one type of data: status, owner, date, money, files, formulas and many more. The same board can be seen as a table, kanban, calendar, Gantt chart or workload, and it can be automated with rules.



The sidebar: Projects, My tasks and, under Analytics, the projects dashboard.

The three entry points

Where	What it opens
Sidebar → **Projects** (columns icon)	The boards screen: the list on the left and the chosen board on the right.
Sidebar → **My tasks**	Every task where you are the owner, across all the workspace boards (chapter 42).
Analytics → Projects → **Dashboard**	The summary of tasks, statuses, due dates and workload by owner (chapter 43).

> **NOTE**
>
> Projects is included in the **Crece**, **Escala** and **Exclusivo** plans. If your plan does not include it, the entries do not show in the menu.

Each **workspace** has its own boards: boards from another workspace are not visible. Within the workspace, the whole team can use Projects; only private boards are restricted (chapter 30). Your teammates' changes show up instantly, without reloading the page.

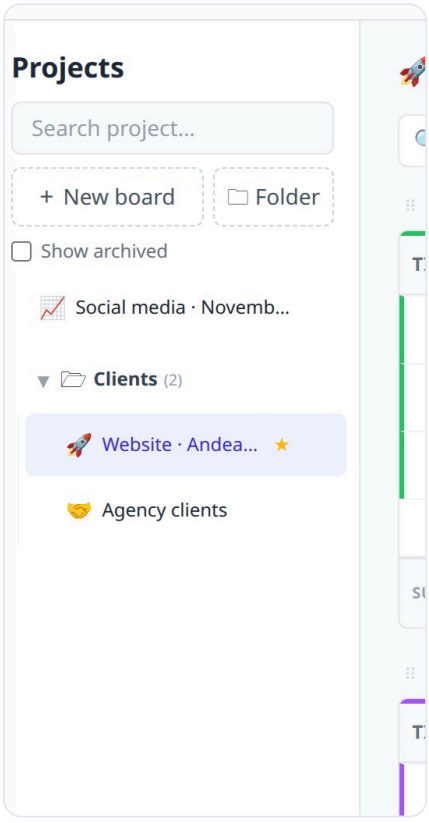
02

CHAPTER 2

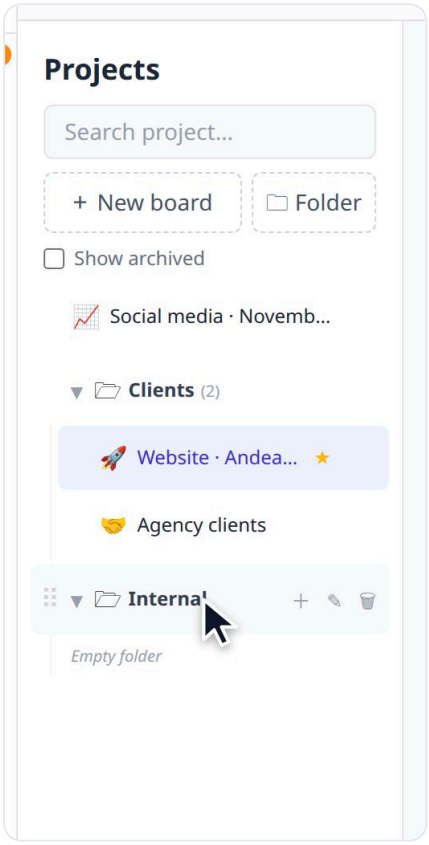
The board list and folders

Find, sort and group your boards.

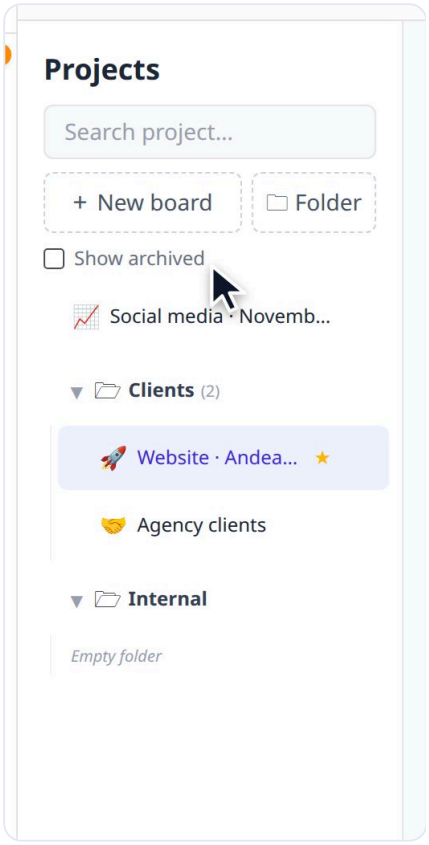
The screen has two parts: the board list on the left and the board you pick on the right. When you come back to Projects, Omnifox opens the last board you used. On a phone you see one part at a time, with the ← button to go back to the list.



The list: search, New board, Folder, Show archived and the boards, with favorites and folders.



A new folder, with its New subfolder, Rename and Delete folder buttons.



Show archived also lists the archived boards.

Element	What it does
Search project...	Filters the list by name. While you search, the list shows without folders; with no matches it says “No results.”.
New board	Opens Create board (chapter 3).
Folder	Creates a folder: type the name in “Folder name...” and press Enter (Esc cancels).
Show archived	Also lists archived boards, greyed out and tagged “Archived”.
Each row	The board’s icon or color, its name, 🔒 if it is private and ★ if it is a favorite.
Handle ⠿	When you hover a row, “Drag to reorder” appears: drag the board to another position.
Row ··· menu	The same “Board options” as in the header (chapter 29).

The order

Favorites always come first; after them, the order you choose by dragging.

Folders

1. Click **Folder**, type the name (for example “Clients” or “Internal”) and press Enter.
2. Drag a board onto the folder to store it there. To take it out, drop it outside the folders.
3. The ▸/▾ arrow collapses or expands the folder (your browser remembers it). Next to it you see how many boards it holds.
4. When you hover the folder, ＋ **New subfolder**, ✎ **Rename** and 🗑 **Delete folder** appear.

> **NOTE**
> There are two levels at most: folder and subfolder. If you delete a folder, its boards are **not deleted**: they move back to the root of the list. A folder without boards says “Empty folder”.

If there are no boards yet you will see “No boards yet” and the **Create your first board** button.

03

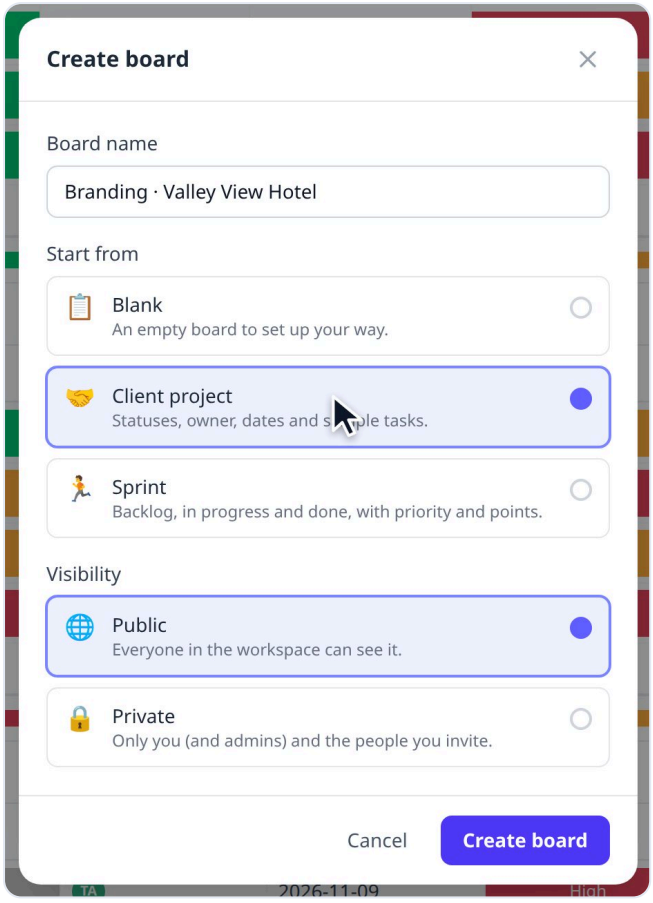
CHAPTER 3

Create a board

Blank, from a template or from your own template.

1. Click **New board**.
2. Type the **Board name** (for example “Branding · Hotel Mirador”). If you leave it empty, Omnifox asks you to “Give the board a name.”.
3. Pick an option under **Start from**: Blank, Client project, Sprint or one of your saved templates.
4. Choose the **Visibility**: Public or Private.

5 Click **Create board**. The new board opens right away.



Create board: name, Start from (Blank, Client project, Sprint) and Visibility.

Start from	What you get
Blank	The groups **To do**, **Working on it** and **Done**; the columns Title, **Status**, **Owner** and **Due date** (the deadline). Subtasks get Subitem, Status and Owner.
Client project	The same plus **Budget** (a number with $) and **Phase** (Discovery, Delivery, Review), with the groups Onboarding, Execution and Closing and seven sample tasks, from the kickoff meeting to the satisfaction survey.
Sprint	The groups Backlog, Current sprint and Done, with **Priority** and **Points** (summed in the footer) and three sample tasks.
Saved templates	One card for each template your team saved ("Your saved template"), with its columns, groups and tasks (chapter 31).

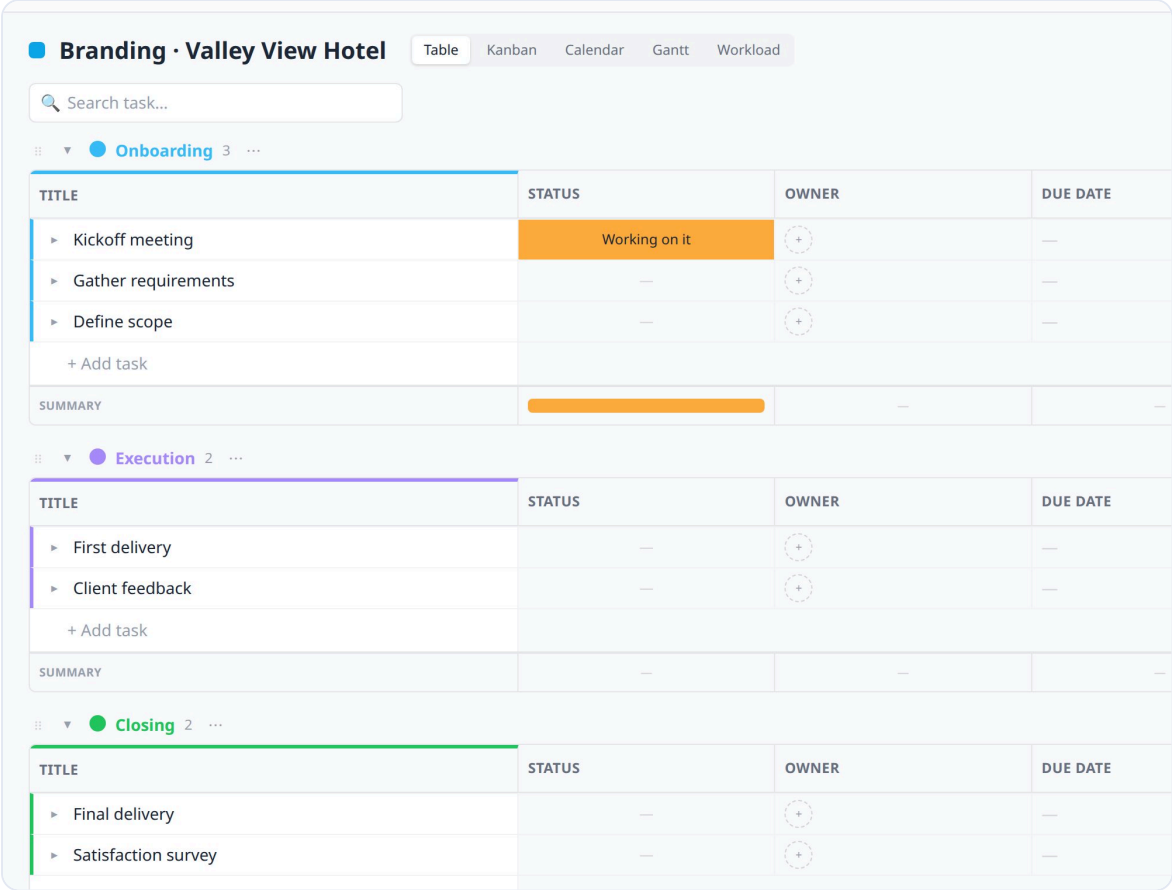
Visibility

Option	Who sees it
🌐 **Public**	Everyone in the workspace.
🔒 **Private**	Only you, the admins and the people you invite. It can be changed later (chapter 30).

Default values

Column	Options
Status	**Done** (green, final state), **Working on it** (orange), **Stuck** (red) and **Not started** (grey).
Priority	**Urgent** (dark violet), **High** (red), **Medium** (orange) and **Low** (blue).
Owner	With **Notify on assignment** on: the assigned person gets a notice (chapter 12).

This is Branding · Hotel Mirador, just created from Client project:



Branding · Hotel Mirador, just created from Client project: groups, columns and sample tasks.

TIP

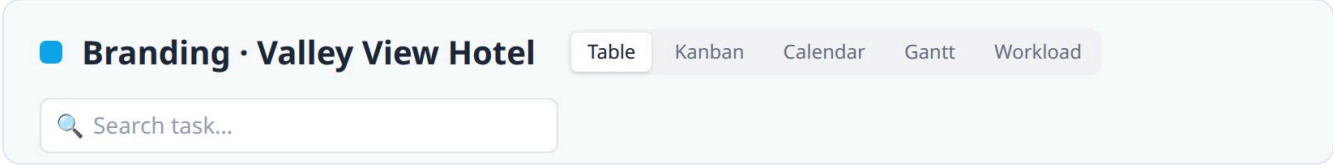
To have AI draft tasks inside an existing board, use the **AI** button (chapter 28). To bring tasks from another tool, use **Import CSV** (chapter 32).

04

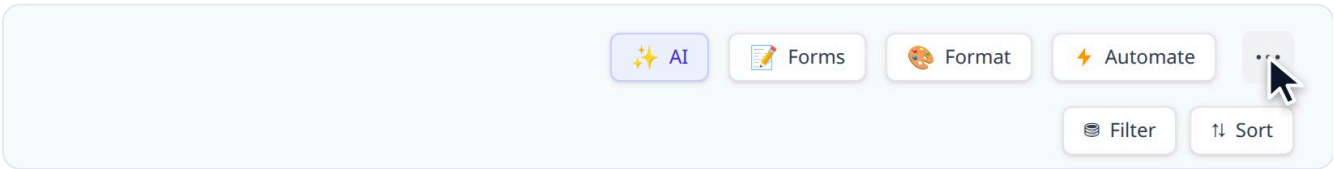
CHAPTER 4

The board header

Name, views and every board tool.



On the left: the board name, the five views and the task search.



On the right: AI, Forms, Format, Automate, the ··· menu and the Filter and Sort buttons.

Control	What it does
Board name	Double-click to rename it (“Double-click to rename”). Enter saves and Esc cancels.
Table · **Kanban** · **Calendar** · **Gantt** · **Workload**	The five views of the same board (chapters 23 to 25). The board always opens in Table.
✨ **AI**	Generate tasks with AI (chapter 28).
📝 **Forms**	Intake forms: each submission creates a task (chapters 34 and 35).
🎨 **Format**	Conditional formatting: color cells or rows (chapter 21).
⚡ **Automate**	This board’s automations (chapters 36 to 41).
··· **Board options**	Favorite, privacy, color, icon, duplicate, template, CSV, activity, archive and delete (chapter 29).
Search task...	Filters tasks by name and counts the matches (chapter 22).
Hidden columns (N)	Shows up when you hid columns: bring them back from here (chapter 10).
Filter and **Sort**	Filters by title, status and person, and the order of tasks within each group (chapter 22).

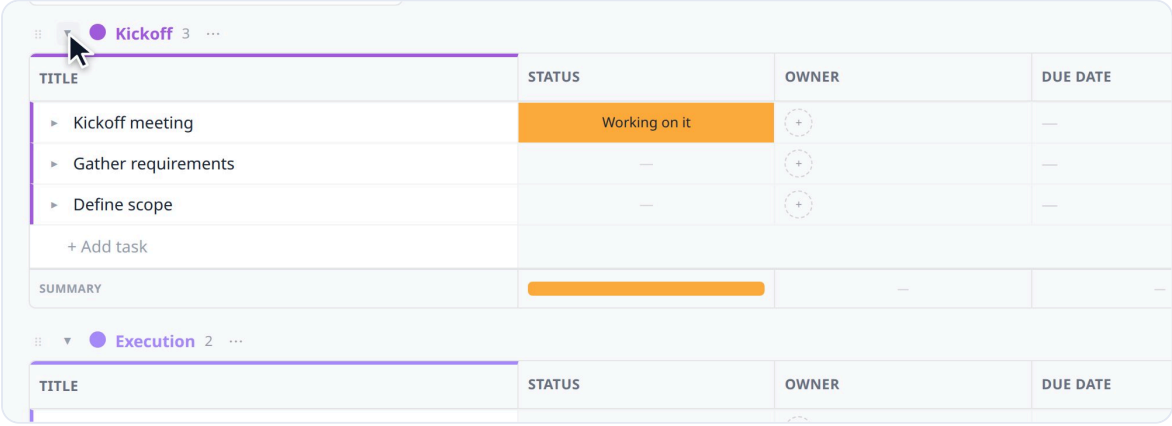
05

CHAPTER 5

Groups

Stages, weeks or areas: the way you arrange your tasks.

Tasks live in **groups**. Each group has its color, its task counter and its summary row at the bottom.



A group header: handle, arrow, color, name, counter and the ··· menu.

Create a group

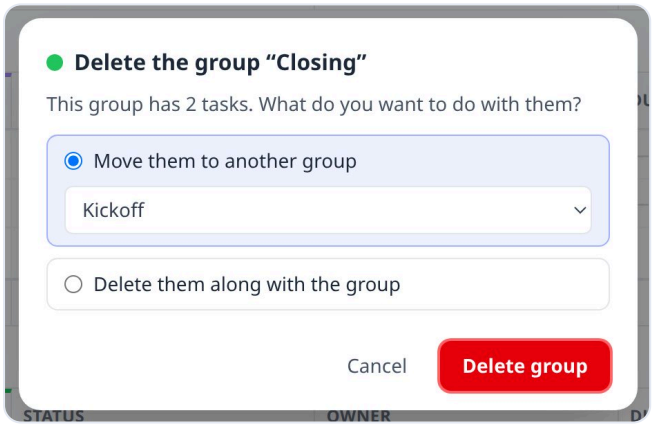
At the bottom of the board type the name in **+ Add group** and click **Add group**. Without a name it is created as “New group”.

The group header

Part	What it does
Handle	“Drag to reorder the group”.
Arrow	Collapses or expands the group, to make room.
Color dot	**Group color**: a palette of 8 colors.
Name	Double-click to rename it.
Counter	How many tasks it has.
··· **Group options**	Rename group, Change color, Collapse group / Expand group, Move up, Move down and Delete group.

Delete a group

If the group is empty, Omnifox asks “This group has no tasks. Do you want to delete it?”. If it has tasks, you choose what happens to them:



Deleting a group with tasks: move them to another group or delete them along with the group.

Option	What happens
Move them to another group	You pick the destination group and the tasks move there.
Keep them without a group	Only shown when there is no other group: the tasks stay “Ungrouped”.
Delete them along with the group	The tasks and their subtasks are deleted. This cannot be undone.

> **NOTE**
> Each group shows 50 tasks; below them **Show more** appears (“Showing X of Y”). While you search, filter or sort, every matching task is shown.

06

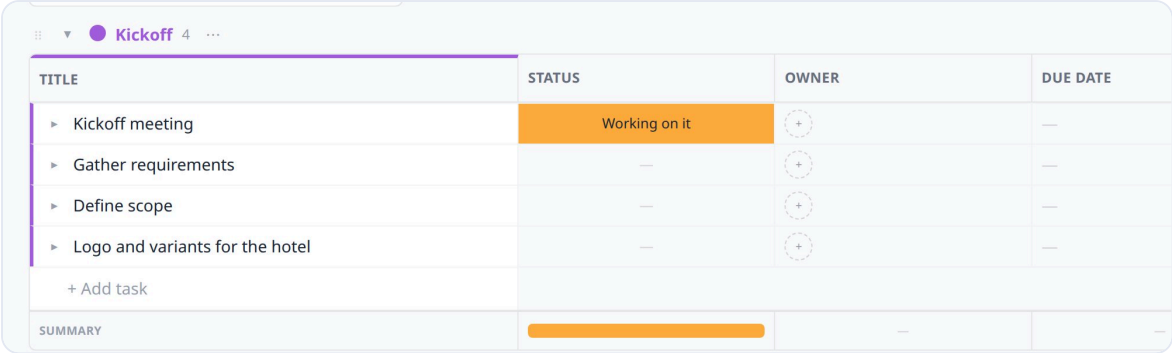
CHAPTER 6

Tasks

Create, rename, move and complete.

1. At the end of the group, type in **+ Add task** and press Enter. You can type one after another.
2. Click the name to edit it (Enter saves, Esc cancels).

3 To move it, drag it within the group or drop it in another group, even an empty one.



The group's tasks and, at the bottom, + Add task and the Summary row.

When you hover the row, **Open detail** (the task panel, chapter 27), the task ⋯ menu (chapter 7) and the trash can appear; the trash asks you to confirm "Delete this task?". A **right-click** anywhere on the row opens the same menu.

Tasks whose status is a **final state** (for example Done) are **struck through** and count as done in Workload, My tasks and the dashboard. Their deadline is no longer painted red.

> **NOTE**
> Actions apply to one task at a time: there are no checkboxes to select several rows at once. Column widths are fixed.

> **TIP**
> With a sort active (chapter 22), dragging does not change what you see: clear the sort to go back to the manual order.

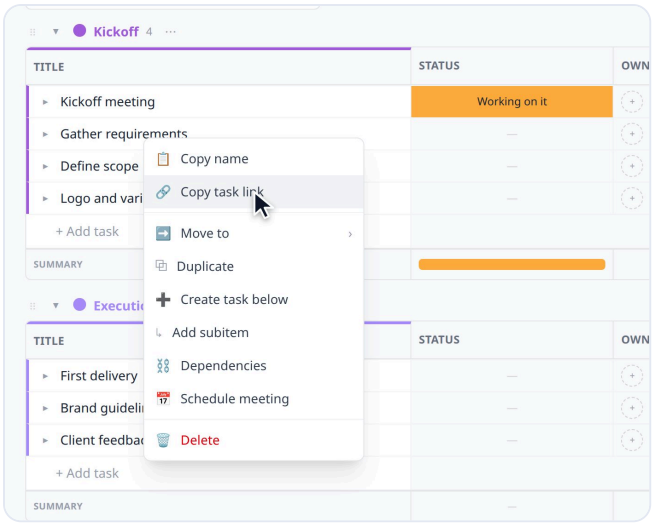
07

CHAPTER 7

The task menu

Everything you can do with a task, one click away.

It opens with ⋯ when you hover the row, or with a right-click on it.



The task menu, opened with a right-click on the row.

Option	What it does
Copy name	Copies the task name (“Copied!”).
Copy task link	Copies a link that opens the board with that task already open. Ideal to share it with a teammate.
Move to ▸	Moves it to another group.
Duplicate	Creates a copy with all its values and “(copy)” in the name.
Create task below	Adds an empty task right below.
Add subitem	Creates an empty subtask (chapter 8).
Dependencies	Which tasks must be finished first (chapter 26).
Schedule meeting	Opens the Calendar booking with the task’s contact or deal. Only shown if the workspace uses the Calendar.
Delete	Deletes the task, after confirming.

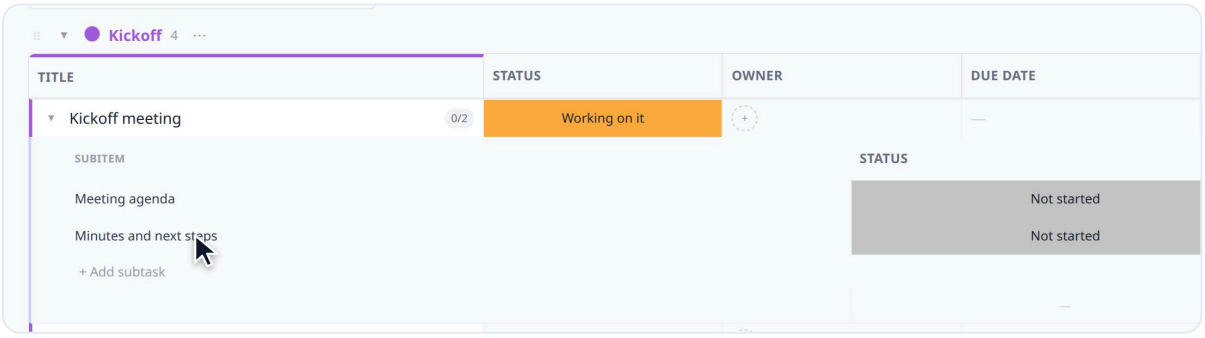
08

CHAPTER 8

Subtasks

Split a task into steps.

Subtasks expand with the arrow next to the task name (**Subtasks**). The badge, for example **0/2**, shows how many are done out of the total.



A task with its subtasks expanded: their own columns and + Add subtask.

- They have their **own set of columns**, independent from the tasks’: by default Subitem, Status and Owner. Add more with the **+** button in their header.
- They are created with **+ Add subtask** or with **Add subitem** in the task menu, and deleted with **Delete subitem**.
- Their summary row works like the groups’.

- There is a single level: a subtask cannot have subtasks.

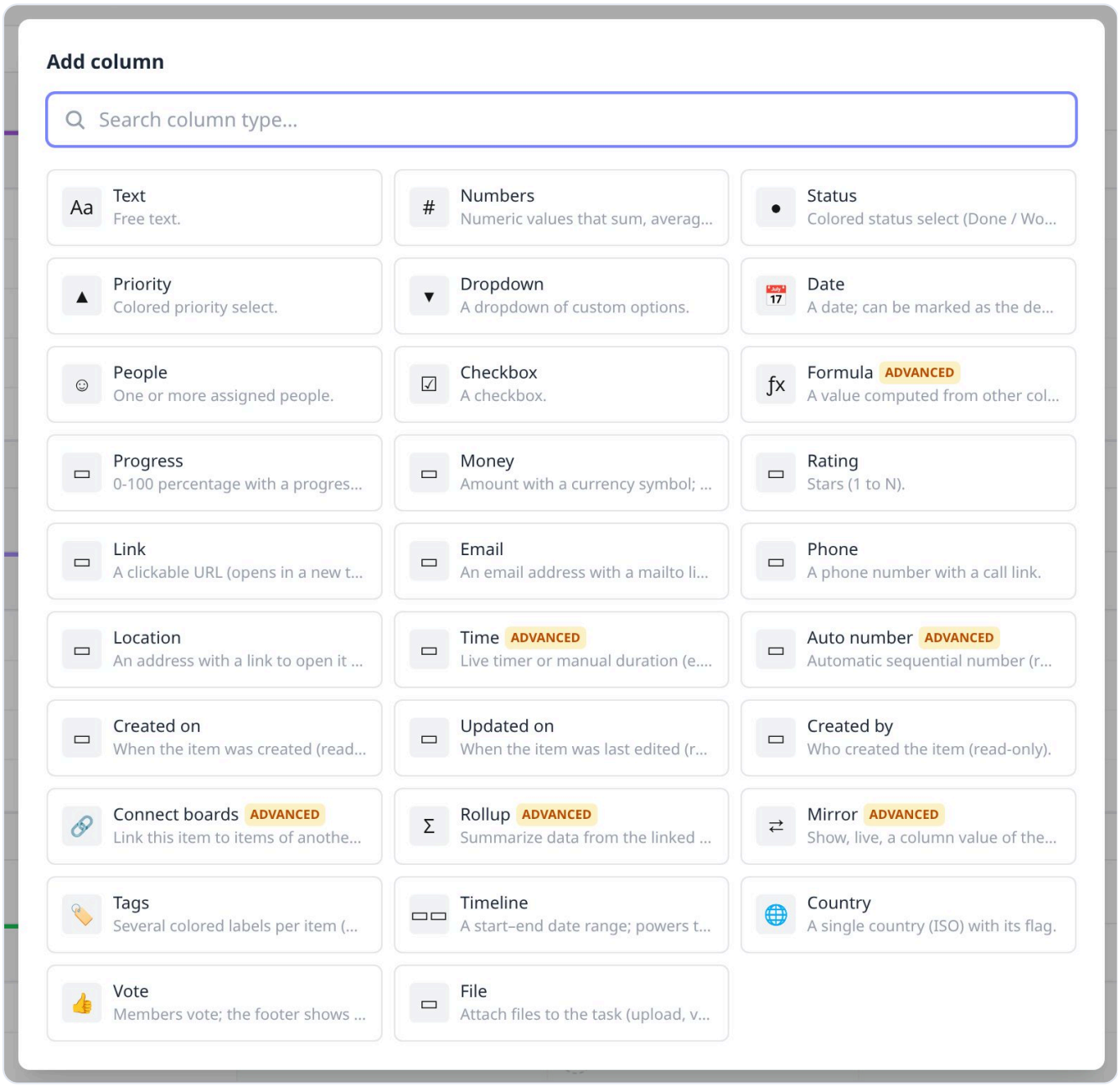
09

CHAPTER 9

Columns: the 29 types

Each column stores one type of data. Pick the one you need.

Columns are the real strength of Projects. To add one, click **+** (Add column) at the end of the headers. The catalog opens with the 29 types, each with its description; at the top you can search in **Search column type...**.



Add column: the 29 types, with their description and the Advanced badge.

When you pick a type, the column is created instantly with the type’s name; then you rename it and adjust it with **Configure**. Formula, Connect boards, Rollup and Mirror open their editor first, and the column is created when you save it. Types with the **Advanced** badge are more powerful columns; they do not need a separate plan.

Type	What it stores	"Configure"
Text	Free text, inline.	**Max length** (empty = "No limit") and **Long text (multiline)**.
Numbers	Quantities: hours, points, units.	**Unit**, **Unit position**, **Decimal places** and **Footer function**.
Status	One colored option (Done, Working on it...).	**Edit options**, with "Is final state".
Priority	One colored option (Urgent, High, Medium, Low).	**Edit options**.
Dropdown	One option from your own list.	**Edit options**.
Date	A day (and, if you want, the time).	**Use as deadline**, **Include time**, **Display format** and **Days before**.
People	One or more people from the workspace.	**Allow multiple people** and **Notify on assignment**.
Checkbox	Yes or no.	**Inline label** and **Checked by default**.
Formula ADVANCED	A computed value (read-only).	**Formula editor** (chapter 18).
File	Attached documents and images.	**Max files** (0 = unlimited).
Progress	A 0–100 percentage with a bar.	**Mode** Manual or Derived from statuses, and **Display as**.
Money	An amount with a currency.	**Currency**, **Symbol**, **Symbol position**, **Decimals** and **Footer function**.
Rating	Stars or another icon, 1 to N.	**Maximum** (up to 10) and **Icon**.
Link	A clickable web address.	**Default display text** and **Open in a new tab**.
Email	An address that opens your email program.	**Default subject**.
Phone	A phone number you call with one click.	**Default country**.
Location	An address with a mini-map.	**Map zoom** (1 to 19).
Time ADVANCED	A per-person timer or time entered by hand.	No options.
Auto number ADVANCED	An automatic sequential number.	**Prefix** and **Zero-pad length**.
Created on	When the task was created.	**Display format**: Date, Date & time or Relative.
Updated on	When it was last edited.	**Display format**.
Created by	Who created the task.	No options.
Connect boards ADVANCED	Links to tasks of another board (or the same one).	**Target board** and **Allow multiple items**.
Rollup ADVANCED	A calculation over the linked tasks.	**Connect column**, **Column to summarize**, **Function** and format.
Mirror ADVANCED	The live value of a column of the linked tasks.	**Connect column** and **Column to mirror**.

Type	What it stores	"Configure"
Tags	Several colored tags at once.	**Edit options**.
Timeline	A date range, from start to end.	**Use as deadline** (the end date) and **Include time**.
Country	A country with its flag.	**Allowed countries** (empty = any).
Vote	The team's votes.	**Max votes per item** (0 = unlimited).

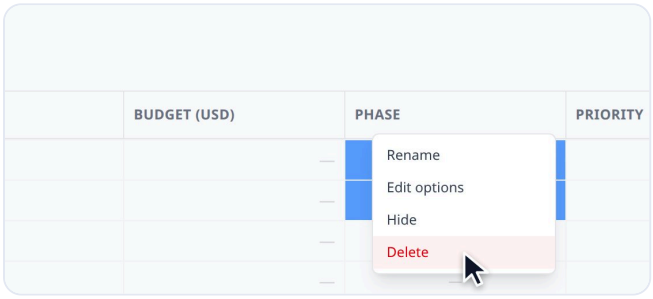
10

CHAPTER 10

The column menu

Rename, move, configure, hide and delete columns.

- **Double-click** the column title to rename it.
- **Drag the header** to move it.
- The ▾ arrow (**Column options**) opens its menu.

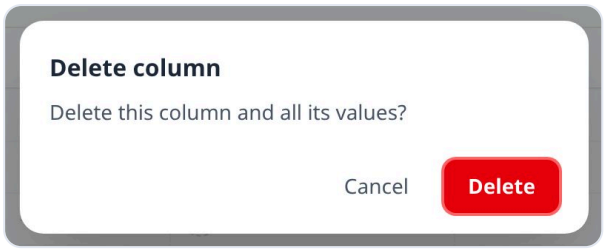


The menu of an options column: Rename, Edit options, Hide and Delete.

Option	What it does
Rename	Changes the name.
Configure	The options of its type (chapters 11 to 19). If the type has none: "This column type has no configurable options.".
Edit options	In Status, Priority, Dropdown and Tags (chapter 11).
Formula editor	In Formula columns (chapter 18).
Hide	Removes it from view without deleting its data.
Delete	Deletes the column and all its values, after confirming.

Hidden columns

When you hide a column, **Hidden columns (N)** appears in the board bar. Open it and click **Show** next to the column you want back. Hidden columns are not offered for sorting and are not exported to CSV.



Deleting a column asks for confirmation: all its values are deleted.

> **NOTE**
>
> The main column, **Title** (the task name), has no menu, cannot be moved and cannot be deleted.

CHAPTER 11

11 Status, priority, dropdown and tags

Colored option columns.

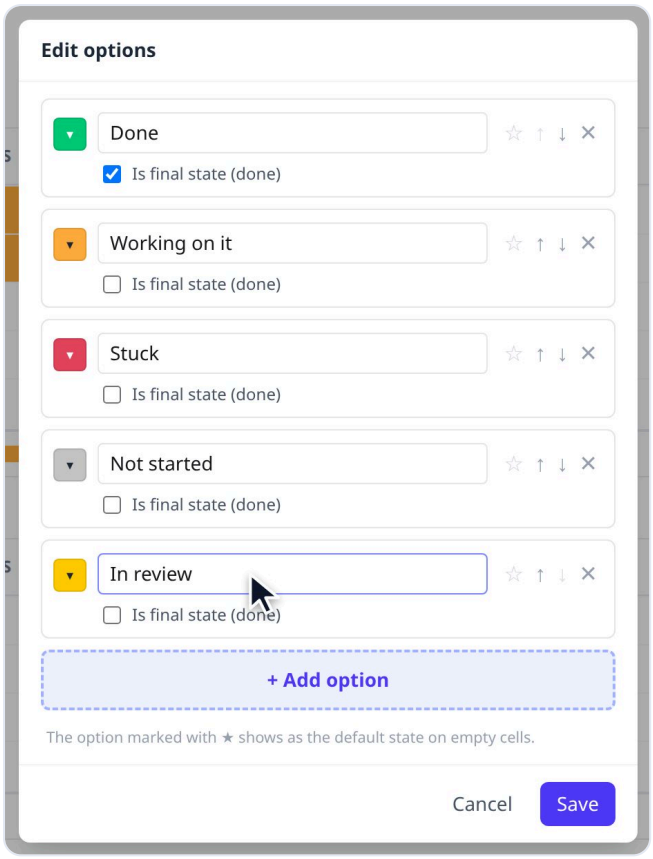
Status and **Priority** pick one colored option: click the cell and choose. A **Dropdown** also picks a single option, from your own list (for example the Phase in Client project). **Tags** put **several** colored labels on the same task, for example the area: Design, Content, SEO.



The Phase dropdown: click the cell and pick an option.

Edit options

All four are set up with **Edit options**, in the column menu.



Edit options for Status: color, name, default option, order and Is final state.

Control	What it does
Color swatch	Opens the palette to pick the option color.
Label...	The option name.
☆ / ★	**Set as default option**: shown on empty cells. Click again to unset it.
↑ ↓	**Move up** and **Move down**: the order of the list.
×	**Delete option**.
Is final state (done)	Status only. See below.
+ Add option	Adds a new option.

Is final state

The option marked as final state (by default **Done**) marks the task as **completed**: it is struck through, no longer counts as overdue and counts as done in the Workload view, in My tasks and in the dashboard. You can mark more than one, for example “Done” and “Cancelled”.

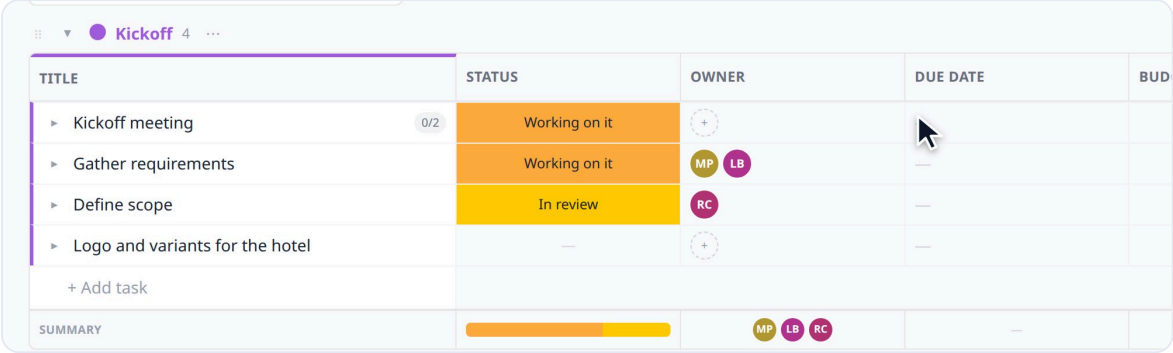
> **TIP**
> Whatever you change in Edit options shows up automatically in the automation pickers (chapter 37): you do not need to rebuild your rules.

CHAPTER 12

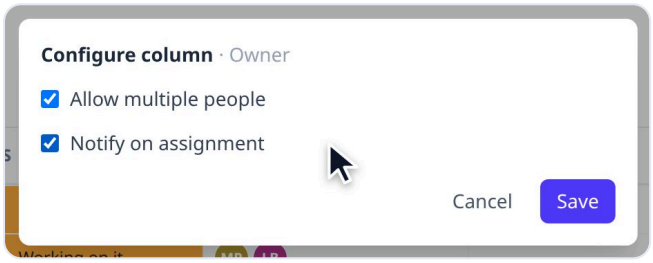
12 Owner (People)

Who does each task.

The **Owner** column (type **People**) assigns people from the workspace: click the cell, search in **Search people...** and choose. A task can have several people; the cell shows their avatars.



The Owner column with several people per task and their avatars in the footer.



Configuring the Owner column: Allow multiple people and Notify on assignment.

Configure option	What it does
Allow multiple people	On (default), the cell accepts several people; off, only one.
Notify on assignment	The person you assign instantly gets “You were assigned a task” in the bell and in the mobile app. Whoever assigns does not notify themselves.

> **NOTE**
>
> On new boards, **Notify on assignment** is on in the Owner column. If an older board does not notify, turn it on in Configure.

The Owner column also feeds the Workload view, My tasks, the person filter and the dashboard’s “Workload by owner” chart.

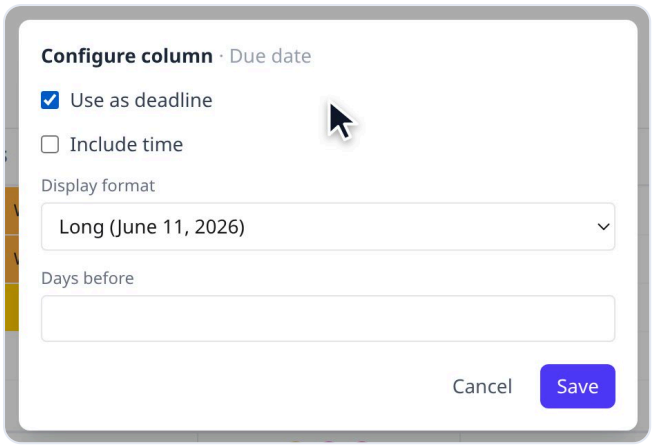
CHAPTER 13

13 Date and timeline

One day, or a range of days.

Date

The **Date** column stores one day: click the cell and the calendar opens. An empty cell shows “—”.



Configuring a Date: deadline, time, display format and Days before.

Configure option	What it does
Use as deadline	"The overdue detector watches this column." It is the date that decides whether the task is overdue.
Include time	Also stores the time.
Display format	ISO (2026-06-11), Long (June 11, 2026), Short (Jun 11) or Relative (in 3 days). Shown in your Omnifox language.
Days before	How far ahead the "Task due soon" notice arrives. Empty: within the previous 24 hours.

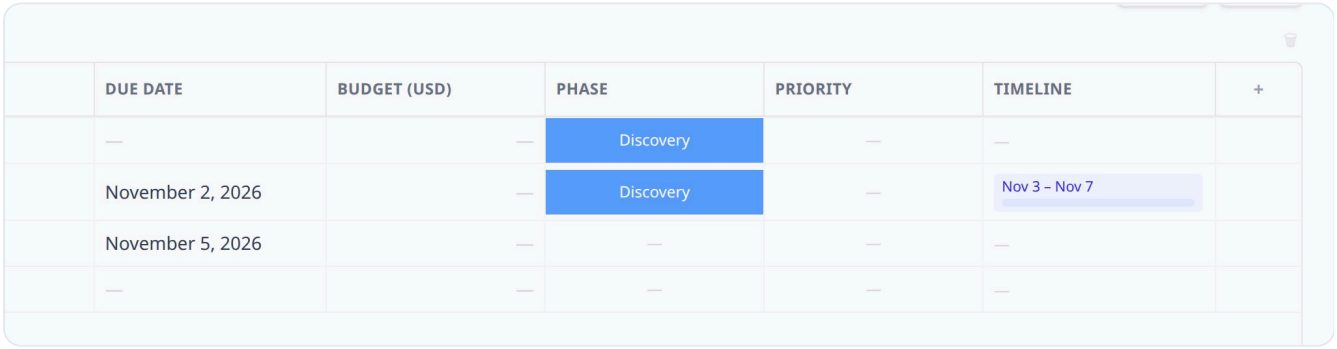
The deadline

The column marked as deadline is the one Omnifox watches (on new boards, **Due date**):

- An uncompleted task whose deadline has passed counts as **overdue** in Workload, My tasks and the dashboard.
- Every morning the owners get **Task due soon** or **Task overdue** (chapter 44).
- A completed task is not flagged as overdue even if its date has passed.

Timeline

The **Timeline** stores a range: clicking it opens a calendar with **Start** and **End**; pick the two days ("N days selected") and click **Apply** (or **Clear** to empty it). It is the column that draws the Gantt bars, and it also places tasks on the Calendar. In Configure you can mark it as the deadline (it watches the end date) and include the time.



Due date in long format and a five-day Timeline.

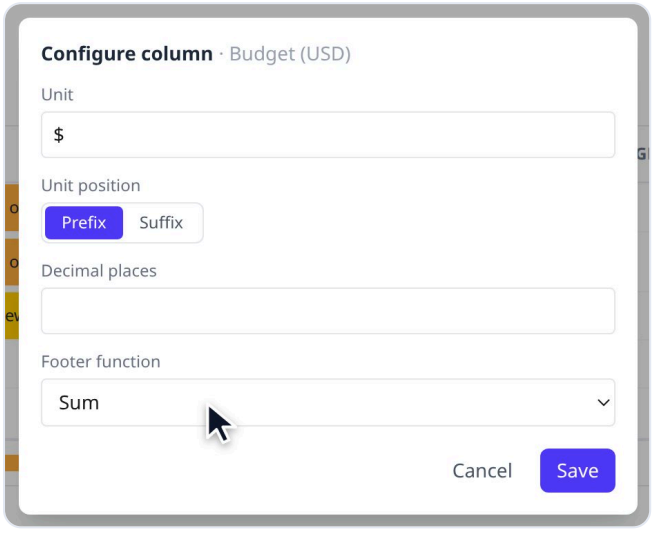
> **TIP**
> Use a single deadline column per board: it is the one every notice, view and the dashboard understand.

14

CHAPTER 14

Numbers and money

Quantities that add up in the footer.



Configuring Numbers: “$” unit as a prefix, decimals and Sum in the footer.

The **Numbers** column stores quantities, such as hours or points. The **Money** column is the same, but with a currency.

Option	Numbers	Money
Unit or currency	**Unit** (e.g. kg, h, pts)	**Currency**: USD, EUR, GBP, MXN, COP, ARS, BRL, CLP, PEN or JPY, and its **Symbol** (up to 4 characters)
Position	**Unit position**: Prefix or Suffix	**Symbol position**: Prefix or Suffix
Decimals	0 to 6	0 to 4
Footer function	Sum, Average, Minimum, Maximum, Median or Count	Same

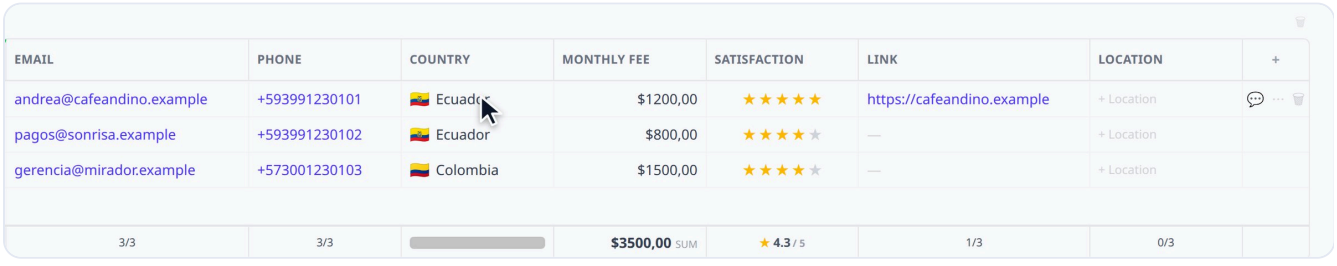
In the example, Budget uses “$” as a prefix and its footer adds up the budget of each stage.

15

CHAPTER 15

Text, link, email, phone, location and country

Contact and place data.



Agency clients: Email, Phone, Country with its flag, Money, Rating and Link.

Type	How to use it	Configure
Text	Short notes; with multiline mode, long texts in a text area.	Max length and Long text (multiline).
Link	A web address (https://...) that opens with one click.	Default display text (e.g. “Open link”) and Open in a new tab.
Email	An address (name@domain.com) that opens your email program.	Default subject (e.g. “Inquiry”).
Phone	A number you call with one click.	Default country (or “No default country”).
Location	**+ Location** → **Search address...**; the address shows on a mini-map (**Map**) with a link to open it on the map. Click **Save**.	Map zoom (1 to 19).
Country	A country with its flag (**Search country...**), named in your Omnifox language.	Allowed countries: leave it empty to allow any.

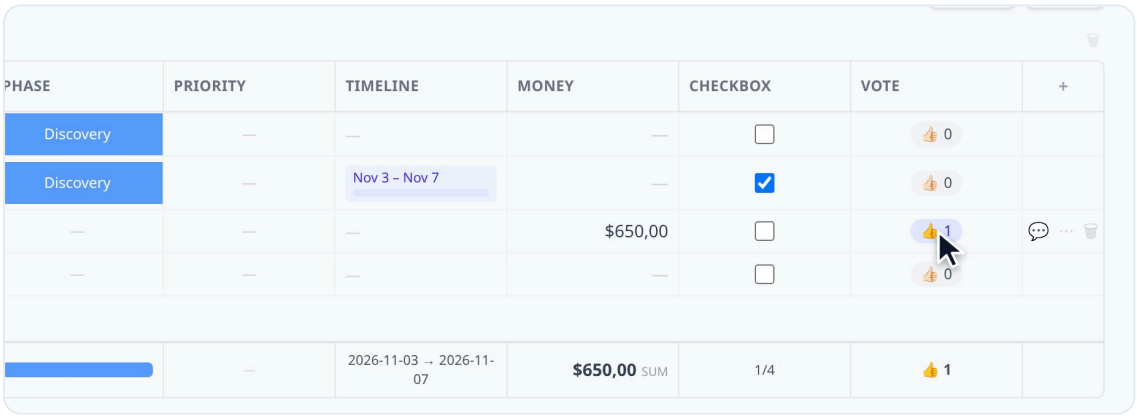
Empty Link, Email and Phone cells show “—”; the input appears when you click.

16

CHAPTER 16

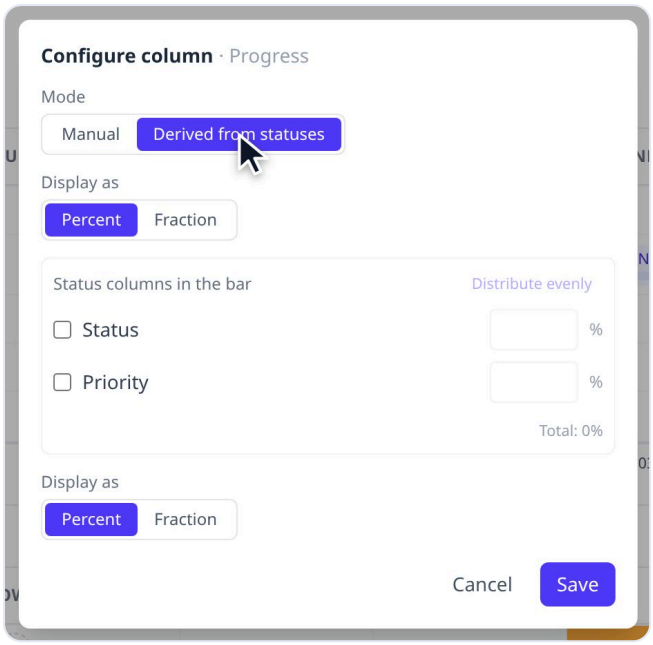
Checkbox, rating, vote and progress

Yes or no, stars, votes and progress.



Checkbox, Vote and each column’s footer.

Type	How to use it	Configure
Checkbox	Marks a yes or a no.	**Inline label** (e.g. “Approved”) and **Checked by default**: new tasks are born checked.
Rating	Click the matching star (or icon).	**Maximum** (1 to 10) and **Icon**: Star, Heart, Thumbs up or Fire.
Vote	Each member votes on the task; the footer adds up the votes.	**Max votes per item** (0 = unlimited).
Progress	A 0 to 100% bar.	See below.



Progress in Derived from statuses mode, with the status columns and their weight.

Progress

Under **Mode** you choose:

- **Manual**: you type the percentage.
- **Derived from statuses**: Omnifox computes the percentage on its own, from the **Status columns in the bar** you tick and the weight (%) of each. **Distribute evenly** splits the weights equally and the **Total** shows below.

Under **Display as** you choose Percent or Fraction. If the board has no Status columns, derived mode says so: “This board has no Status columns.”.

17

CHAPTER 17

File, time and automatic columns

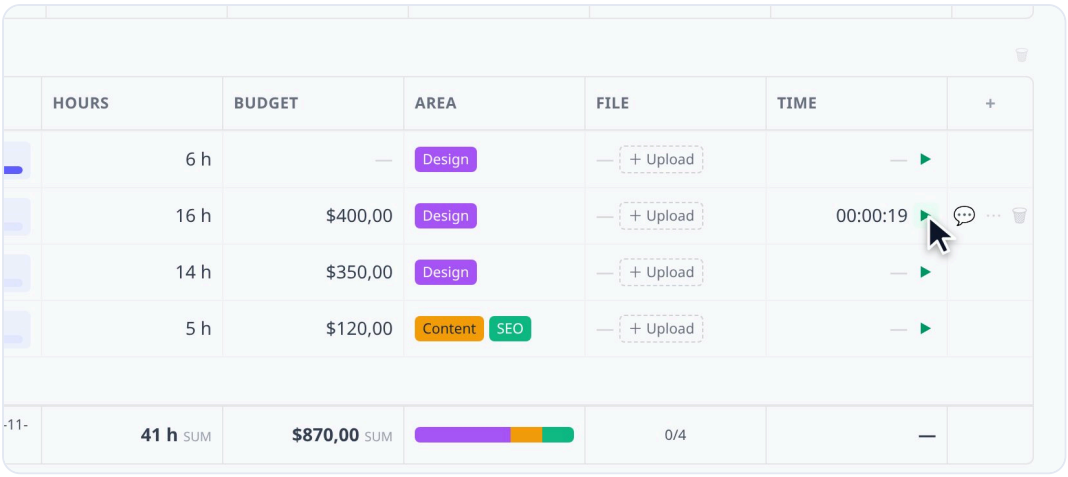
Attachments, timer and data that fills itself.

File

The **File** column attaches documents and images to the task: **+ Upload** (“Uploading...”), one click to view or download, and **Remove**. In Configure, **Max files** per cell (0 = unlimited).

Time

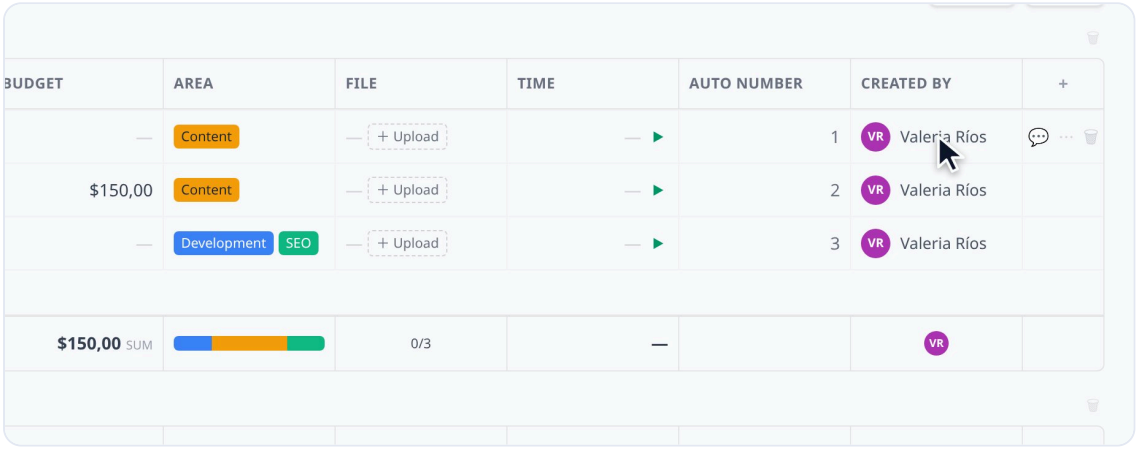
The **Time** column is a timer: click ▶ **Start timer** when you start working and ■ **Stop timer** when you finish. Each person tracks their own time (while it runs you see “Running”). With **Edit time manually** you enter a duration by hand: 1h 30m, 90m or 1:30. The detail shows the **Total** and the **Sessions** (“You” or the teammate), and the group footer adds up the time.



The Time column's timer running on a task.

Automatic columns

They fill themselves and cannot be edited. Useful for tickets, requests and audits.



Automatic columns: Auto number and Created by.

Type	What it shows	Configure
Auto number	A sequential number per task: 1, 2, 3…	**Prefix** (e.g. "REQ-") and **Zero-pad length** (0 to 10: with 4, "REQ-0007").
Created on	The task's creation date.	**Display format**: Date, Date & time or Relative.
Updated on	The date of the last edit.	Same as Created on.
Created by	Who created the task.	No options.

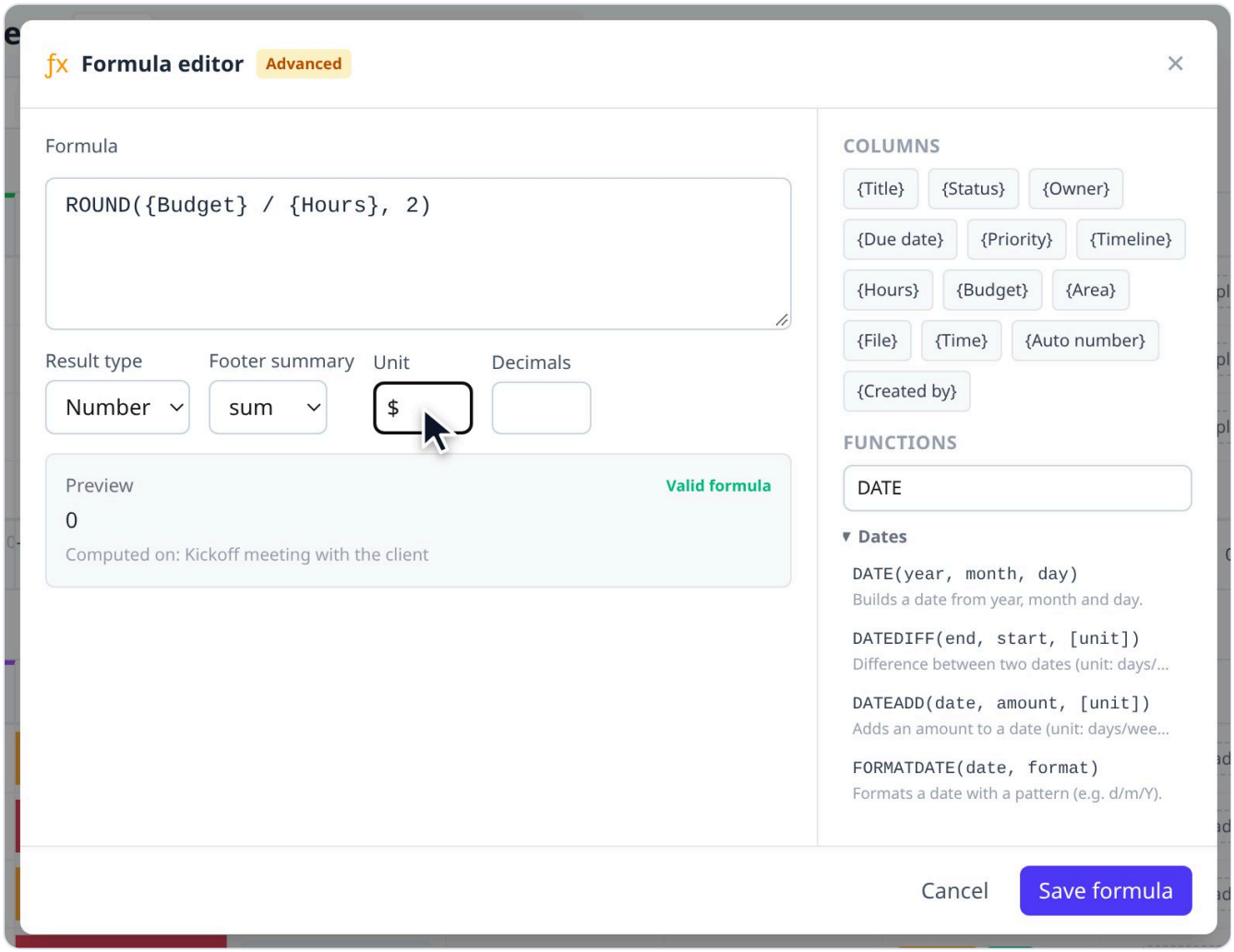
18

CHAPTER 18

Formulas

Compute a value from other columns.

The **Formula** column computes its value on its own, from the task's other columns. It reads everything, even text and statuses (a status contributes its label). The value is read-only.

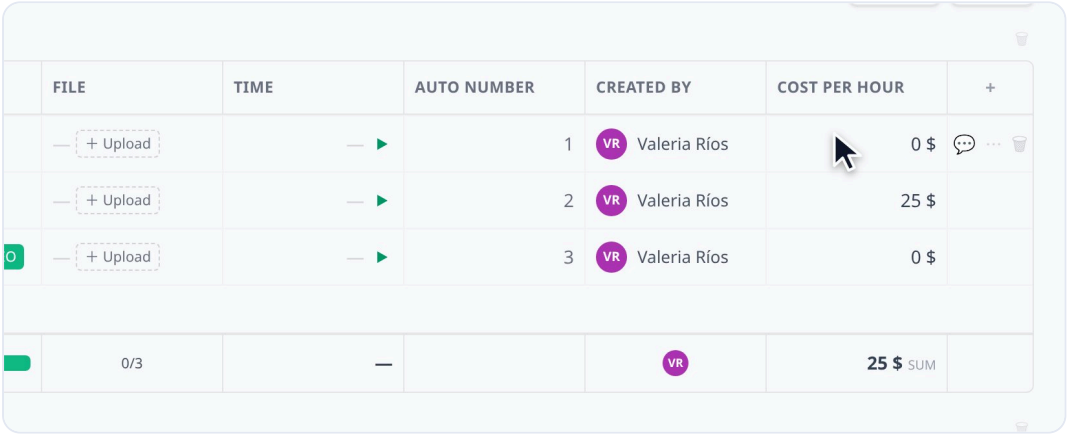


The Formula editor: the expression, the result type, the preview and the Columns and Functions panels.

The formula editor

Part	What it does
Formula	The expression, for example `{Price} * {Quantity}`.
Columns → Insert column	One click inserts the column in braces, like `{Hours}`.
Functions	Search in **Search function...** and one click inserts it with its arguments.
Result type	Number, Text, Date or Yes/No.
Footer summary, **Unit** and **Decimal places**	How the result is displayed and what the group footer computes.
Preview	Computes the result "Computed on" a sample task and says **Valid formula** or **Formula error**.
Save formula	Creates or updates the column.

Estudio Nova computes the cost of each working hour: the budget divided by the hours, rounded to two decimals and with "$" as the unit: `ROUND({Budget} / {Hours}, 2)`.



The Cost per hour column, computed on each task and summed in the footer.

Syntax

Element	Example
Columns	`{Budget}`, by name in braces.
Numbers and text	`1.5`, `"Hello"` or `'Hello'`; `TRUE` and `FALSE`.
Operators	`+ - * / % ^`, comparisons `= == <> != < > <= >=` and `&` to join text.
Functions	`IF({Hours} > 10, "Long", "Short")`, `DATEDIFF({Due date}, TODAY(), "days")`.

> **NOTE**
> If a formula fails on a task, the cell shows **#ERROR** and the rest of the board keeps working. Hover to see the expression. Yes/No results show as "Yes" or "No".

The 41 functions

Math (13)

Function	
`SUM`	Adds all the values.
`SUBTRACT`	Subtracts the second value from the first.
`MULTIPLY`	Multiplies all the values.
`DIVIDE`	Divides the first value by the second.
`ROUND`	Rounds a number to the given decimals (0 by default).
`ABS`	Absolute value.
`MIN`	The smallest of the values.
`MAX`	The largest of the values.
`AVG`	Average of the values.
`POW`	Raises the base to the exponent.
`MOD`	Remainder of the division.
`CEILING`	Rounds up to the integer.
`FLOOR`	Rounds down to the integer.

Text (11)

Function	
`CONCAT`	Joins several texts into one.
`UPPER`	Converts the text to uppercase.
`LOWER`	Converts the text to lowercase.
`TRIM`	Removes leading and trailing spaces.
`LEN`	Number of characters.
`LEFT`	The first N characters.
`RIGHT`	The last N characters.
`MID`	A slice from a position (1-based) of a given length.
`REPLACE`	Replaces one text with another.
`CONTAINS`	True if the text contains the search (case-insensitive).
`SEARCH`	Position (1-based) of the search in the text, 0 if missing.

Dates (10)

Function	
`TODAY`	Today's date.
`NOW`	The current date and time.
`DATE`	Builds a date from year, month and day.
`DATEDIFF`	Difference between two dates (unit: days/weeks/months/years/hours).
`DATEADD`	Adds an amount to a date (unit: days/weeks/months/years/hours).
`YEAR`	The year of a date.
`MONTH`	The month of a date.
`DAY`	The day of a date.
`WORKDAYS`	Working days (Mon-Fri) between two dates.
`FORMATDATE`	Formats a date with a pattern (e.g. d/m/Y).

Logic (7)

Function	
`IF`	If the condition is true returns one value, otherwise another.
`AND`	True if ALL conditions are true.
`OR`	True if ANY condition is true.
`NOT`	Inverts a boolean value.
`ISBLANK`	True if the value is empty.
`ISNUMBER`	True if the value is numeric.
`SWITCH`	Compares a value against several cases and returns the match.

19

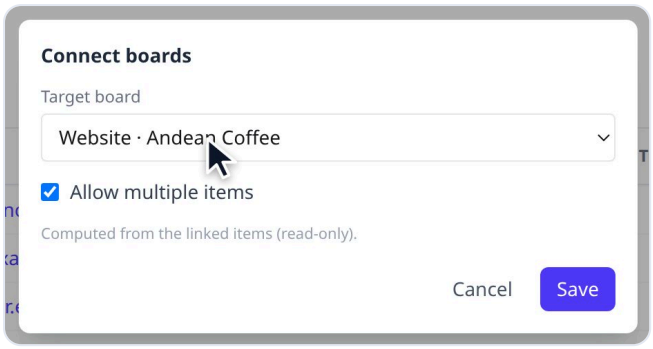
CHAPTER 19

Connect boards, rollup and mirror

Link tasks across boards and bring in their data.

Connect boards

A **Connect boards** column links each task with tasks of another board in the same workspace (or of the same board). In Agency clients, Estudio Nova connects it with Website · Andean Coffee.



Connect boards: the target board and Allow multiple items.

1. Add the **Connect boards** column.
2. Choose the **Target board** in "Choose a board..." and, if you want, **Allow multiple items**. Click **Save**.
3. In the cell, click **+ Link**, search in **Search items...**, tick the tasks and click **Save**.

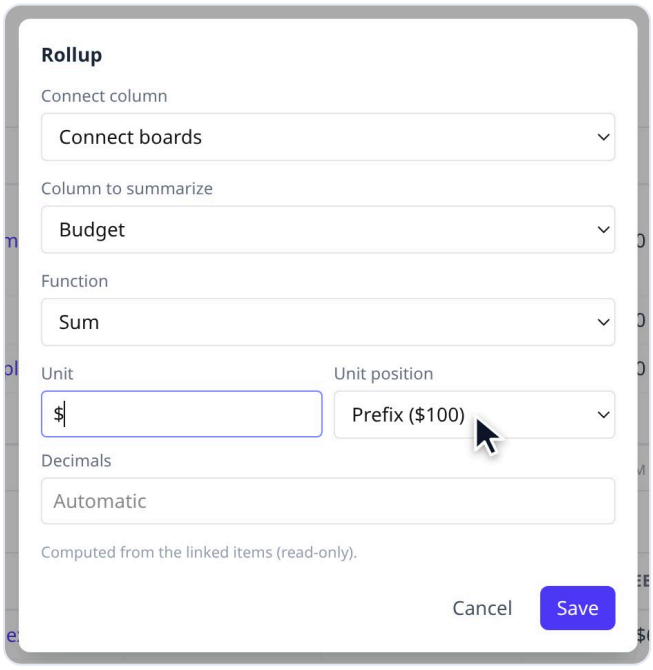
On the other board the link shows too, as "Reciprocal link (read-only)".



A client linked to three tasks of the website board.

Rollup

Computes over the linked tasks. It needs a Connect column on the same board; until configured it says "Not configured".

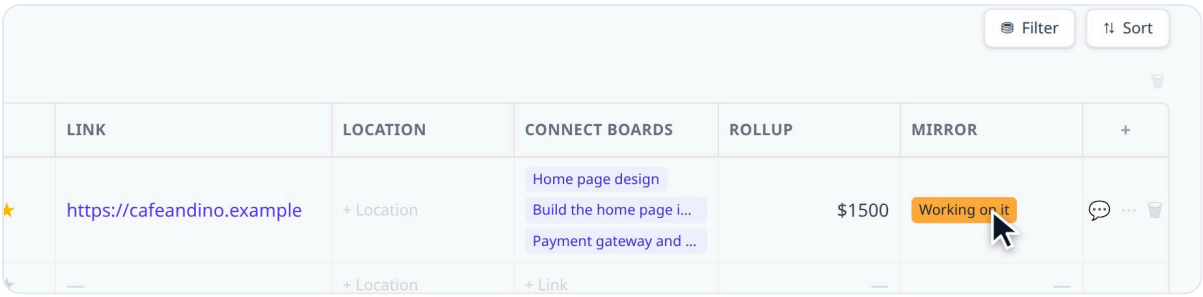


Rollup: the sum of the linked tasks' Budget, with "$" as a prefix.

Field	What you choose
Connect column	The Connect boards column it uses.
Column to summarize	The column on the other board (for example Budget).
Function	Sum, Average, Minimum, Maximum, Count, Concatenate, Earliest or Latest.
Unit and its position	Prefix ($100) or Suffix (100 hs).
Decimals	Automatic, 0, 1, 2...
Separator	For Concatenate.

Mirror

Shows, live and as is, the value of a column of the linked tasks, for example the Status of each website task. It asks for **Connect column** and **Column to mirror**. If the board has no Connect column, it warns “Add a “Connect boards” column to this board first.”.



Connect, Rollup and Mirror together: the linked tasks, their total budget and the status.

> **TIP**
> Rollup values can be used in a Formula: for example, the client’s total budget divided by their monthly fee.

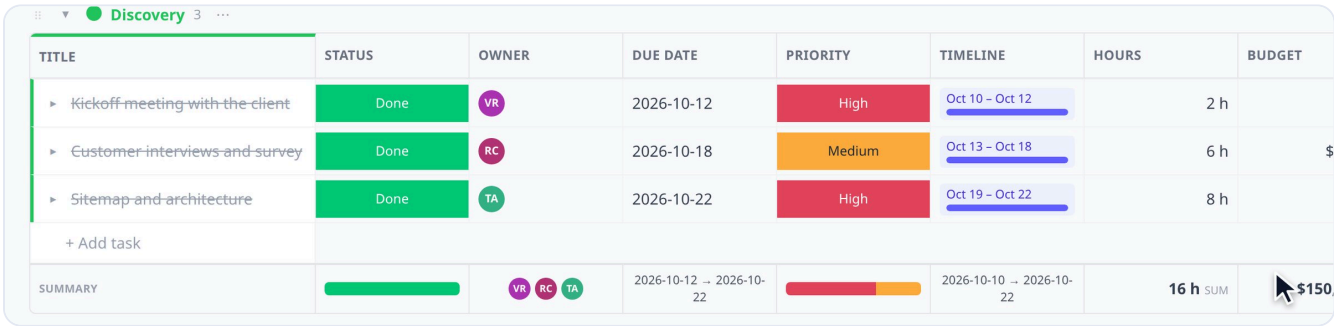
20

CHAPTER 20

The summary footer

How each stage is going, at a glance.

At the bottom of each group, the **Summary** row summarizes each column according to its type:



The Summary row: status bar, avatars, date ranges and sums.

Column type	What the footer shows
Numbers, Money, numeric Formula and Rollup	The value with the chosen function: sum, avg, min, max, median or count.
Status, Priority and Dropdown	A color bar with the share of each option.
Date and Timeline	The range, from the earliest to the latest date.
Checkbox	Checked out of the total (e.g. 1/4).
Owner	The people's avatars, with their count.
Time	The total duration.
Rating and Progress	The average.
Vote	The total votes.
Connect, Mirror and the rest	"With data / total": how many tasks have the cell filled.

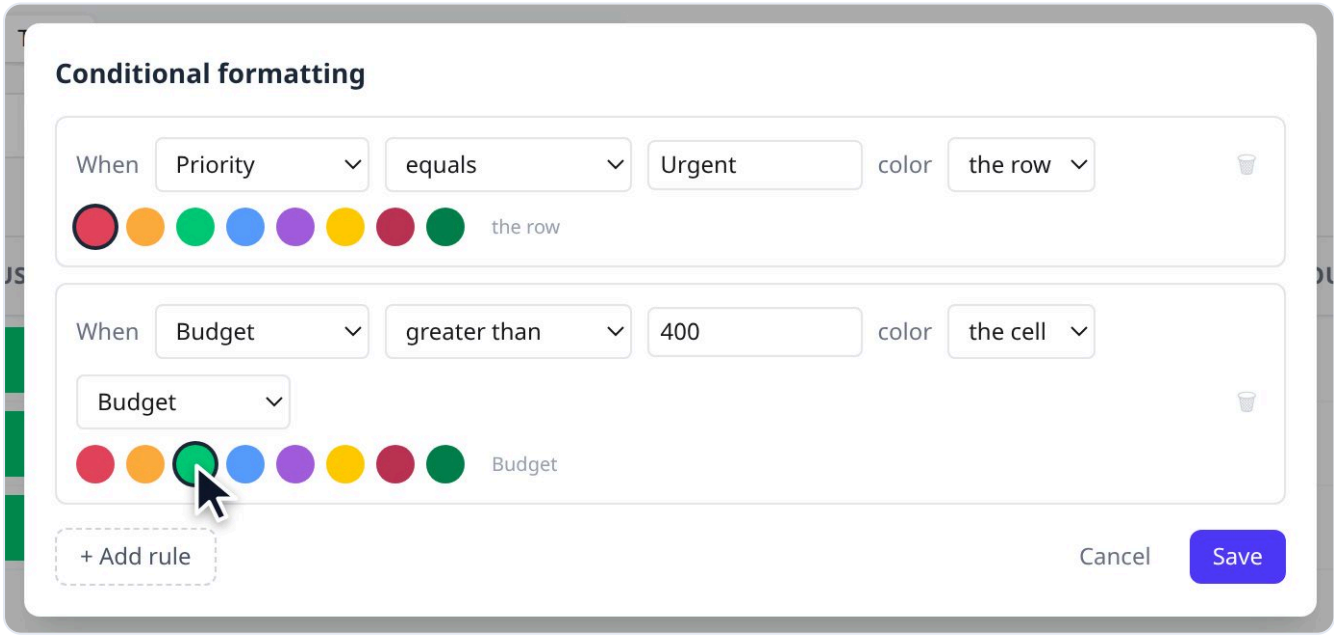
21

CHAPTER 21

Conditional formatting

Color cells or rows based on a condition.

The **Format** button opens **Conditional formatting**. Each rule reads like a sentence: **When** [column] [condition] [value], **color** [the cell / the row] [a color].



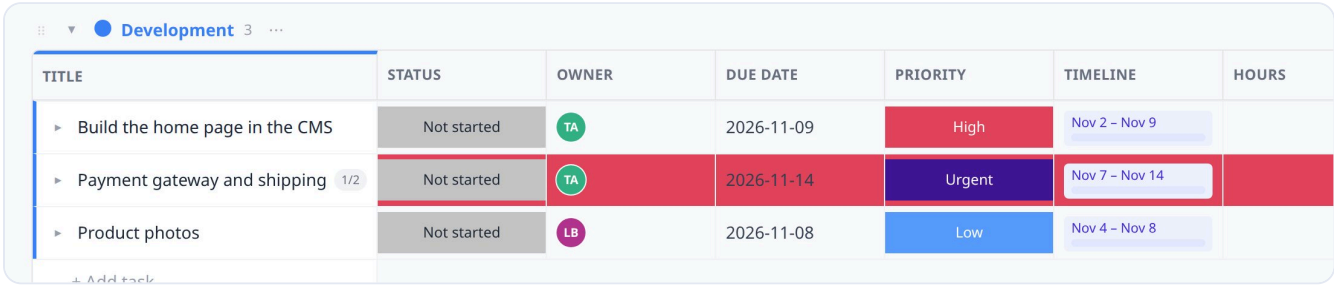
Conditional formatting: Urgent rows in red and the Budget cell in green above 400.

1. Click **Add rule**.
2. Choose the column and the operator and type the value (for example Priority · equals · Urgent).

3. Choose **the row** or **the cell**; for the cell, also the **column to color**.
4. Choose the color and click **Save**.

Operators: **equals**, **is not**, **contains**, **does not contain**, **greater than**, **less than**, **greater or equal**, **less or equal**, **before**, **after**, **is empty**, **is not empty**. There are 8 colors: red, orange, green, blue, violet, yellow, maroon and dark green.

Estudio Nova paints Urgent rows red and the Budget cell green when it is above 400 dollars:



The result on the board.

> **NOTE**
> Rules are saved on the board, for the whole team. For Status, Priority and Dropdown type the option name as you see it (upper or lower case does not matter).

CHAPTER 22

22 Search, filter and sort

Find exactly the tasks you are looking for.

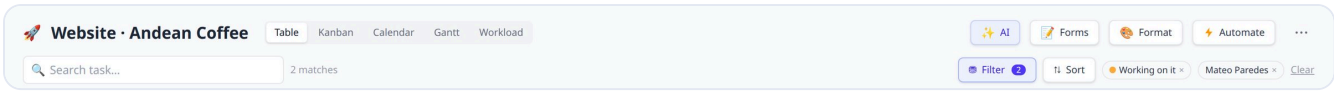
Search

Search task... filters instantly by task name (accents do not matter) and shows how many matches there are; × **Clear search**. With none: “No task matches your search.”.

Filter

Filter	What it does
Title contains	Text that must be in the name.
Statuses	The options of the board’s first Status column: tick the ones you want to see.
People	The people of the first Owner column.

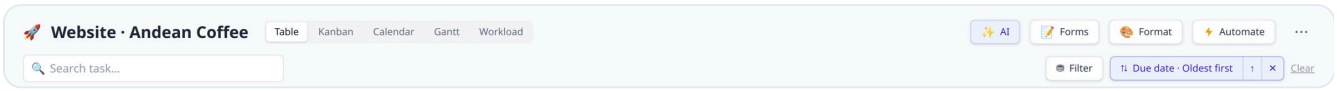
Combine all three: for example, Mateo’s tasks that are Working on it. Active filters show as chips next to the buttons, and each is removed with its ×; **Remove filters** clears them all and **Done** closes the panel.



An active filter: the status and person chips, and the matches.

Sort

Under **Sort by** you pick **Manual order (unsorted)**, **Name**, **Creation date**, **Last updated** or any visible column. The direction depends on the type: A → Z / Z → A, Oldest first / Newest first, Low to high / High to low, Option order / Reverse order. **Reverse the order** and **Clear sort** are at hand.



Sorted by Due date, oldest first.

> **NOTE**
>
> Tasks are sorted within each group and tasks without a value go last. Your sort is remembered in your browser; filters are not: reloading the page clears them.

> **TIP**
>
> Search and filters apply to every view: Table, Kanban, Calendar, Gantt and Workload. If a view is missing tasks, check for an active filter.

Tasks are always grouped by their groups, and there are no saved views: each person sets up the filter they need on the spot.

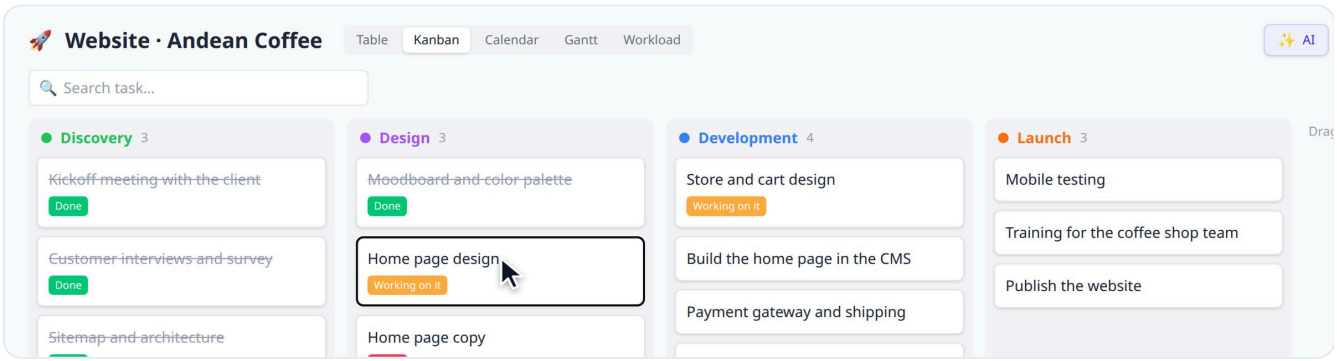
23

CHAPTER 23

Kanban view

Each group is a column of cards.

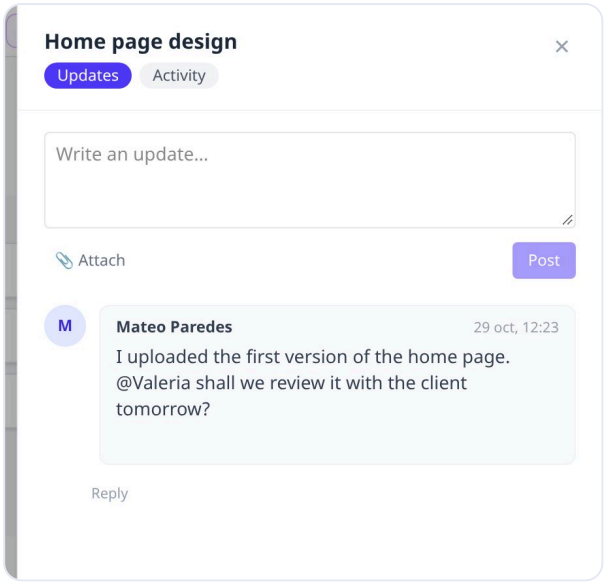
The **Kanban** view shows each group as a column, with its color and its cards. Each card has the task name (struck through if done) and its Status label.



The Kanban view: one group per column and one card per task.

- **Drag** a card to another group to move it (“Drag cards between groups.”).

- **Click** a card to open its detail.
- It honors the search and the filters.



Clicking a card opens the task detail.

TIP

Kanban columns are the groups, not the statuses. If you want a Kanban by status, name your groups after your statuses and use an “enters a group” automation to keep them in sync. New tasks are created from the Table.

24

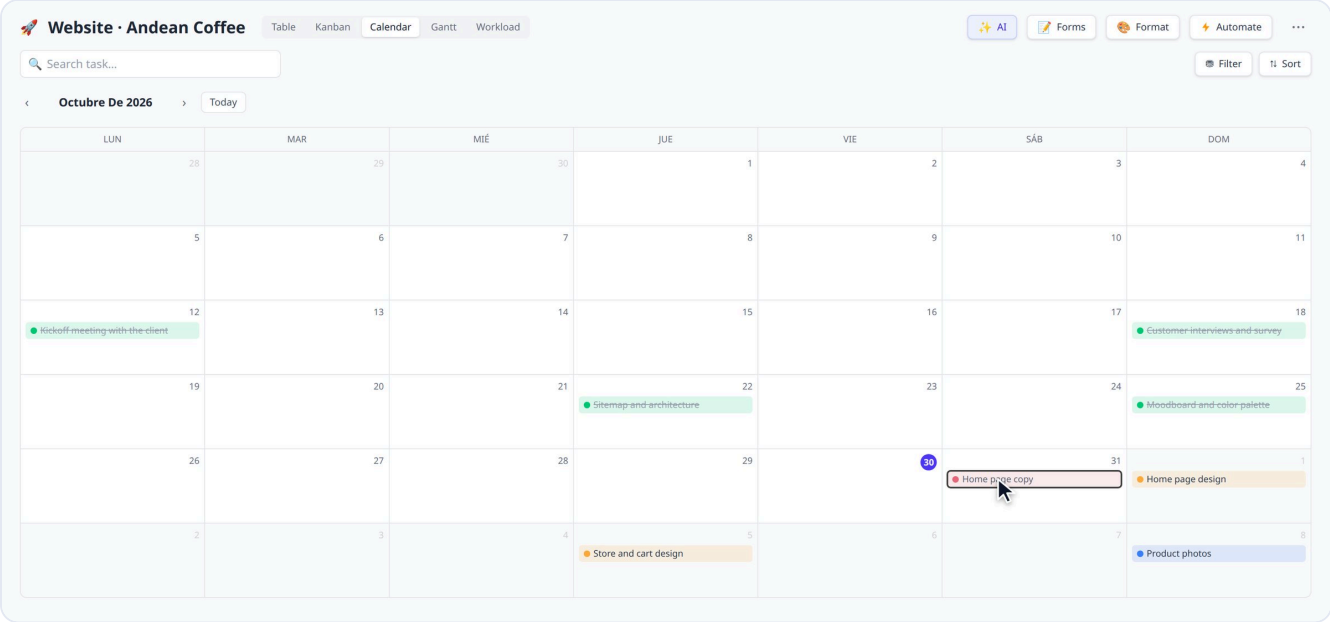
CHAPTER 24

Calendar and Gantt views

Dates and deadlines over time.

Calendar

The **Calendar** places each task on its day, in a monthly grid. It uses, in this order: the Date column marked as deadline, the first Date column or, if there is none, the end (or the start) of the Timeline.

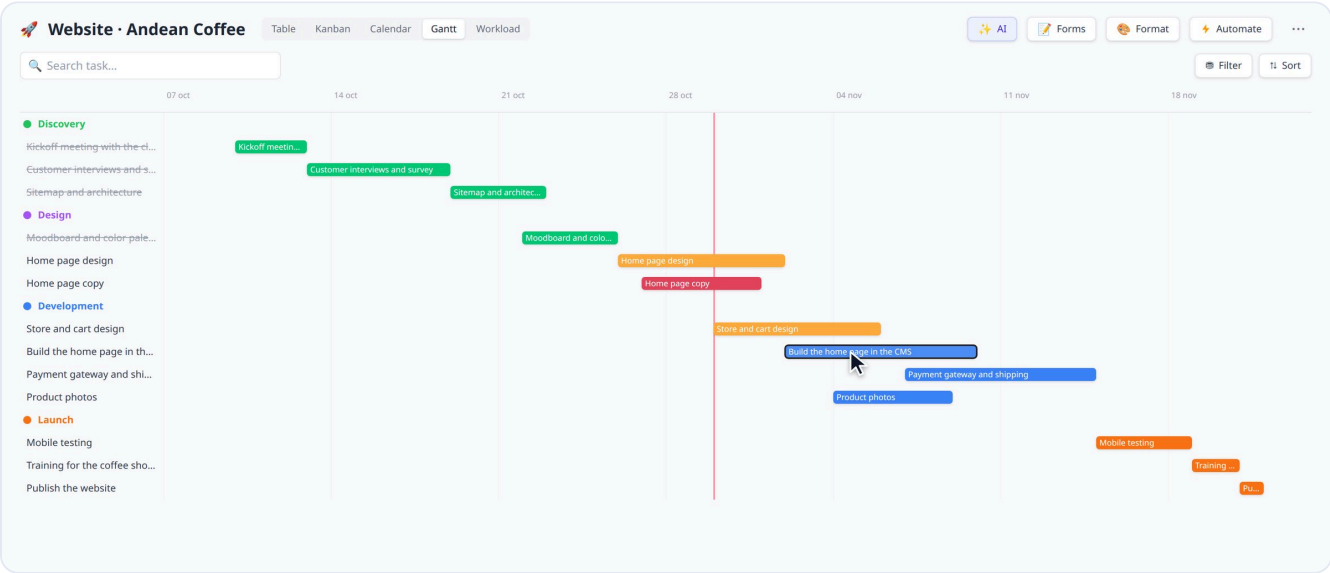


The Calendar view: each task on its date.

- **Previous month** and **Next month** change month; **Today** goes back to the current one.
- Clicking a task opens its detail.
- To change a date, edit it in the Table: tasks are not dragged on the Calendar.

Gantt

The **Gantt** draws a bar per task, from the start to the end of its Timeline, grouped by group and with the **Today** line. If a task only has a Date, a one-day dot is drawn. The scale switches from weeks to months on its own. It is the best way to see whether stages overlap; click a bar or the name to open the task.



The Gantt view: one bar per task, by group, with the today line.

> **NOTE**
>
> The Gantt shows dates, not arrows: dependencies (chapter 26) are checked in each task's menu. Without date columns, the Calendar and the Gantt ask you to add a date or timeline column.

25

CHAPTER 25

Workload view

How many tasks each person has.

The **Workload** view shows a bar per person from the Owner columns, plus an **Unassigned** row for tasks with no owner. Each bar separates **pending** tasks from **done** ones (dimmed) and, if the board has a deadline, counts the **overdue** ones.



The Workload view: each person's pending and done tasks.

At the top you see how many people have tasks and how many are overloaded. From **8 pending tasks** the person is flagged red with the **Overloaded** badge: so you can spread the work better before something slips. Workload also honors the search and the filters.

> **NOTE**
>
> Without a person column, the view says so: "Add a Person column to see the workload per assignee.".

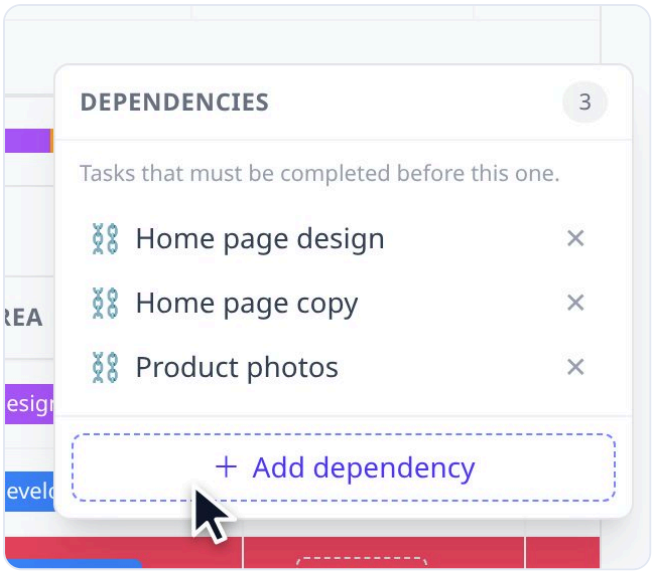
26

CHAPTER 26

Dependencies

What has to be finished first.

Dependencies show which tasks must be completed before another one. In the example, "Build the home page in the CMS" depends on the design and the copy: so the whole team knows what is waiting on what.



The dependencies of “Build the home page in the CMS”.

1. Open the task menu and choose **Dependencies**.
2. Click **Add dependency** and search the task in **Search task...** (main tasks of the same board).
3. To remove one, click × **Remove** on its row.

Omnifox does not let a task depend on itself (“An item cannot depend on itself.”) or form a loop (“That would create a circular dependency.”).

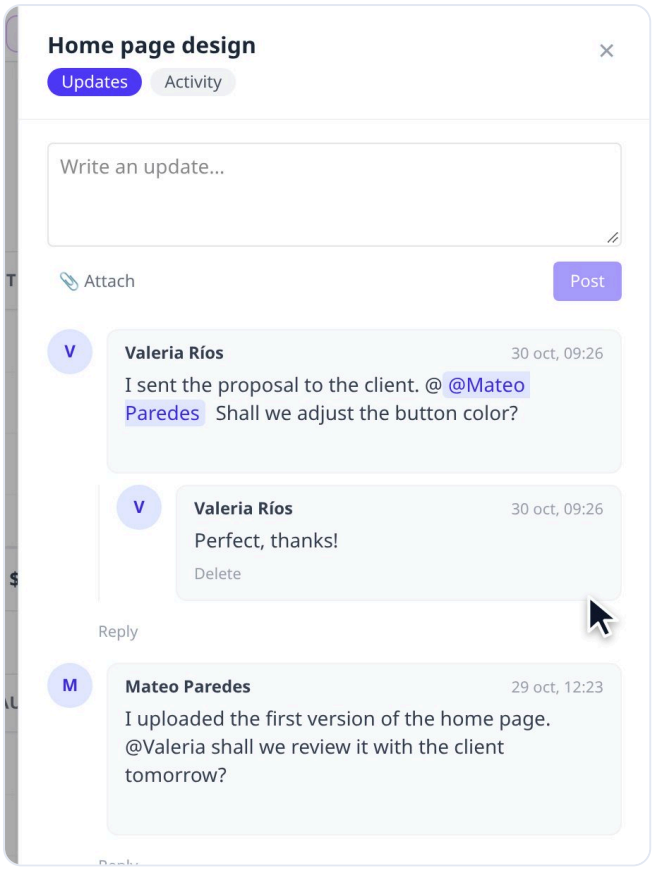
> **NOTE**
> Dependencies inform the order: they do not block status changes. Use them together with the Gantt to plan.

CHAPTER 27

27 The task detail

Talk about the work, inside the task.

Open detail (or a click in Kanban, Calendar or Gantt) opens the task panel on the right. Close it with × or Esc.



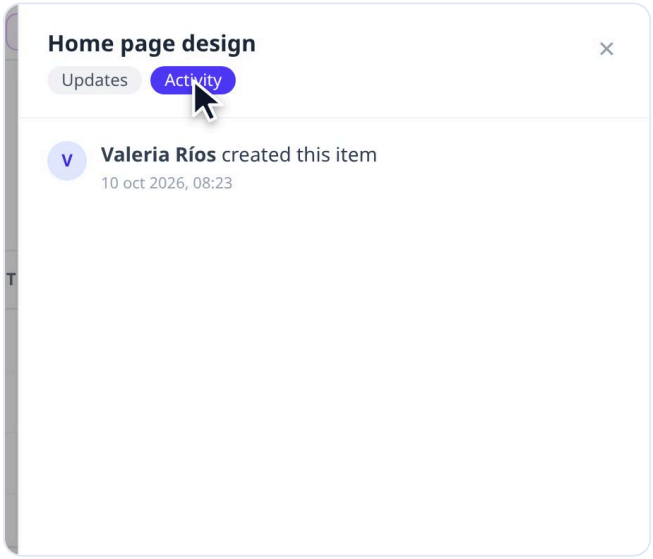
Updates: a mention and a reply in the thread.

Updates

- Type in **Write an update...**, attach files with **Attach** and click **Post** (or **Ctrl + Enter**, **Cmd + Enter** on a Mac).
- Type **@** to mention a teammate: they get “You were mentioned in a task”.
- Each update shows its author, the date and its attachments to download.
- **Reply** opens a reply below it (one thread level).
- **Delete** only shows for the author and for admins.

With no updates: “No updates yet. Be the first!”.

Activity



The Activity tab of the detail panel.

The **Activity** tab tells the task’s story: who created it, who changed each column, with the old and the new value, and what AI and automations did.

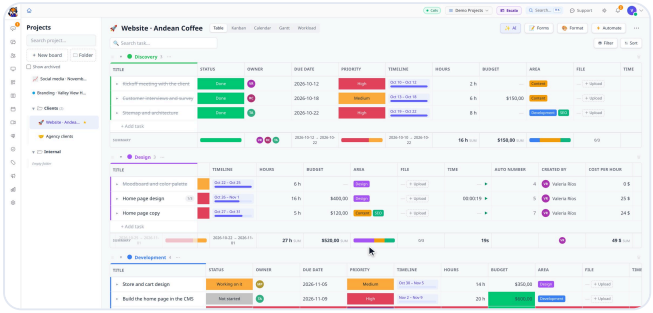
> **NOTE**
> The panel holds the conversation and the history. Column values, subtasks and dependencies are edited in the Table row.

28

CHAPTER 28

Generate tasks with AI

Describe what you want to achieve and AI builds the list.



Generate tasks with AI: the request and the group where they are added.

1. Click ✨ **AI** in the board header.
2. In **Your request** describe what you want to achieve, for example “add 4 tasks to announce the new store on social media” (3 to 1,000 characters).
3. Choose the group in **Add to group** (by default, the board’s first group).
4. Click **Generate tasks**. In seconds the tasks are in the group, ready to assign.

- AI creates the task **titles**; you fill in the dates, owners and other columns.
- If you do not ask for a number, it suggests 3 to 7 tasks; 20 at most.
- It uses AI credits from your plan. With no balance it warns “Your plan reached the AI token limit or your balance is insufficient...”.
- If the answer is not useful: “AI returned no tasks. Try rephrasing your request.”.

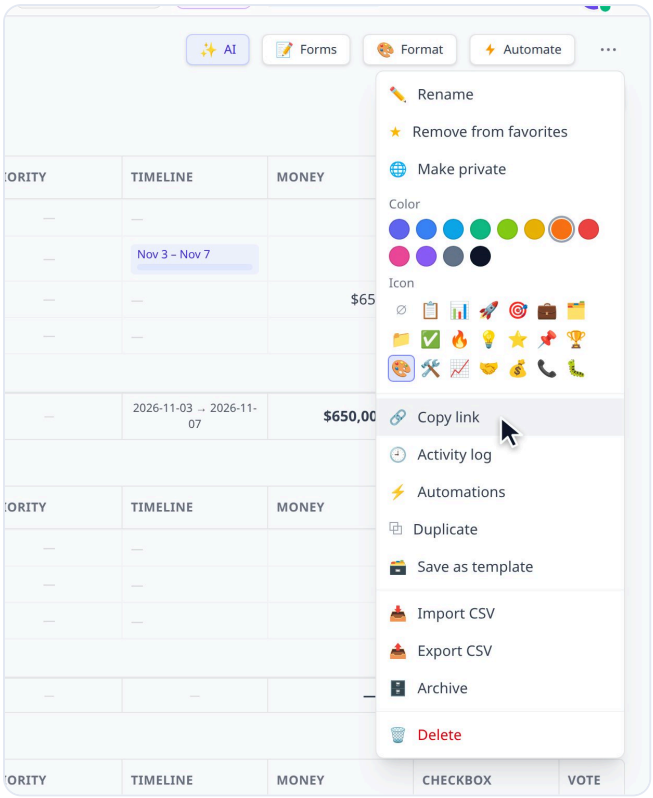
29

CHAPTER 29

The board menu

Everything about the board in a single menu.

The ··· menu (**Board options**), top right and on each row of the list, holds:



The ··· menu with every board option.

Option	What it does
✏️ **Rename**	Changes the name (up to 160 characters).
☆ **Add to favorites** / **Remove from favorites**	Favorites move to the top of the list, with ★.
🔒 **Make private** / 🌐 **Make public**	Opens Visibility & access (chapter 30).
👥 **Manage access**	Private boards only: who else sees it.
Color	12 colors to recognize it in the list.
Icon	20 emojis (📋 📊 🚀 🎯 💼 ...) or none.
🔗 **Copy link**	The board link, to share it.
🕘 **Activity log**	Everything that happened on the board (chapter 33).
⚡ **Automations**	Same as the Automate button.
⧉ **Duplicate**	Copies the whole board and opens the copy (chapter 31).
🗃️ **Save as template**	Chapter 31.
📥 **Import CSV** / 📤 **Export CSV**	Chapter 32.
Archive / **Unarchive**	Chapter 33.
Delete	Deletes the board with all its content (chapter 33).

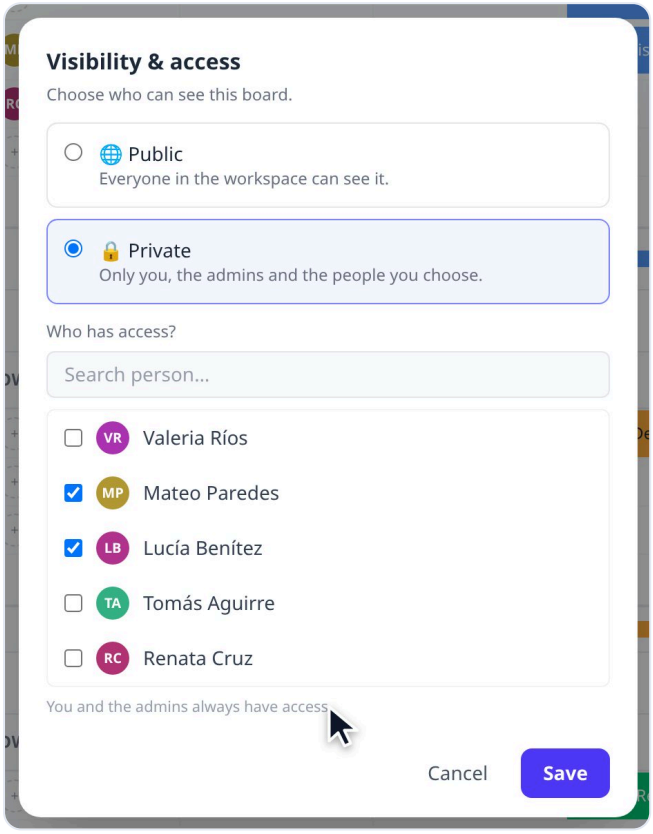
The board description is not edited from here: the name, color and icon are what identify it.

30

CHAPTER 30

Visibility & access

Who can see each board.



Visibility & access: a private board with two invited people.

Make private opens **Visibility & access** (“Choose who can see this board.”).

Option	Who sees it
Public	Everyone in the workspace.
Private	Its owner, the admins and the people you tick.

1. Choose **Private**.
2. Under **Who has access?** search in **Search person...** and tick the people you want to add.
3. Click **Save**.

With **Manage access** you add or remove people at any time. “You and the admins always have access.”

> **NOTE**
> For people without access, a private board does not show in the list, in My tasks or in the dashboard either.

31

CHAPTER 31

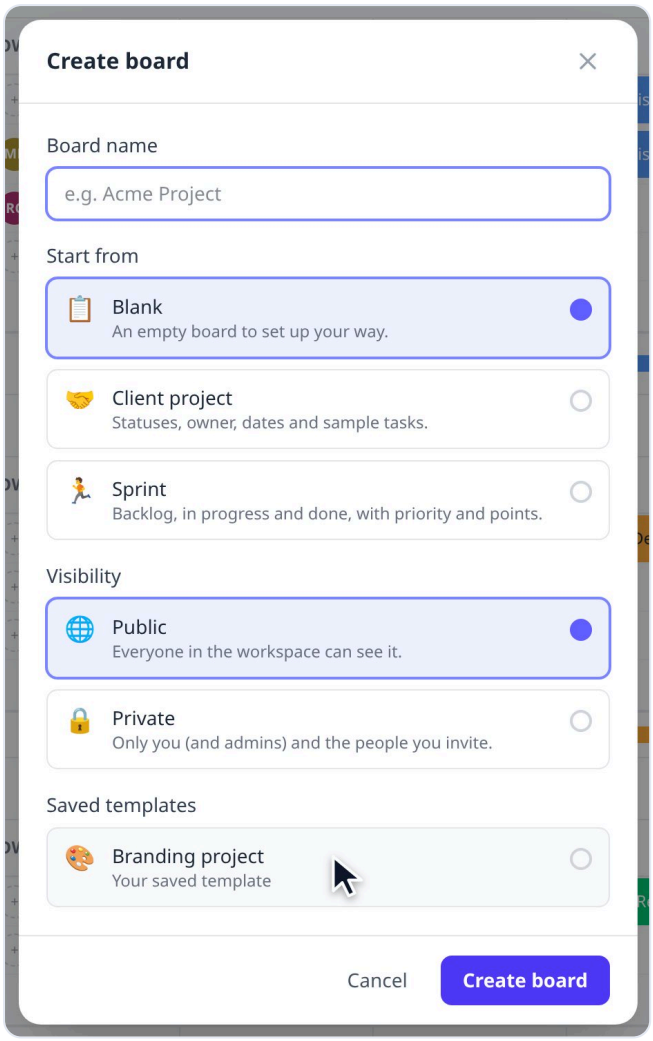
Duplicate and save as template

Repeat the same process with every client.

Duplicate

Duplicate copies the whole board: task and subtask columns, groups, tasks, subtasks and values. The copy keeps the name with “(copy)” and opens right away.

Save as template



The saved template shows up in Create board, under Saved templates.

1. In the board menu, choose **Save as template**.
2. Type the **Template name** (Omnifox suggests "Name (template)") and confirm.
3. "Template saved. It will appear when creating a board." shows up.

The template is offered under **Saved templates** when you create a board, with its columns, groups and tasks. Ideal for the process you repeat with every client.

WATCH OUT

Saved templates belong to the workspace and stay available to the whole team; they cannot be deleted from the screen, so give them clear names and save only the ones you will reuse.

CHAPTER 32

32 Export and import CSV

Take your tasks to a spreadsheet, or bring them from another tool.

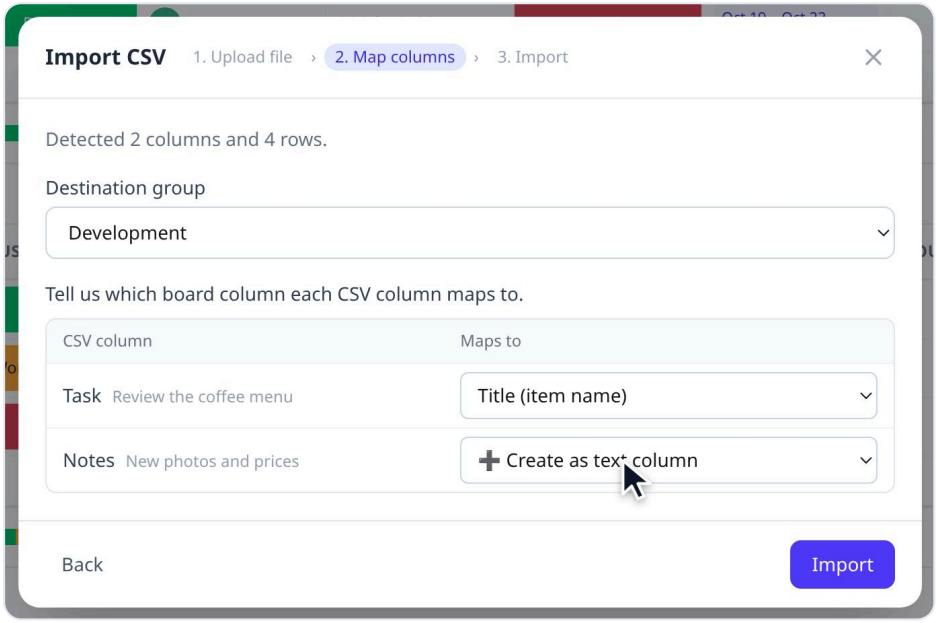
Export CSV

Downloads the main tasks with their visible columns (Title first), as a UTF-8 CSV ready to open in Excel or Google Sheets. It does not include the group or the subtasks.

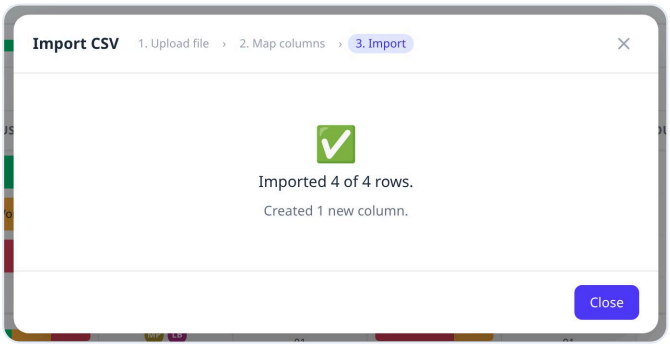
Import CSV

Three steps: **Upload file** → **Map columns** → **Import**.

1. **Upload file**: drag a CSV file or click **Choose file**. CSV (UTF-8), up to 5 MB and 5,000 rows.
2. **Map columns**: Omnifox says how many columns and rows it detected and shows a preview. Choose the **Destination group** and, for each CSV column, which board column it goes to: **Title (item name)**, an existing column, ➕ **Create as text column** or **Ignore**.
3. Click **Import**. At the end you see how many rows were imported and how many new columns were created.



Import CSV, step 2: each file column goes to Title or to a new column.



Import CSV, step 3: the result.

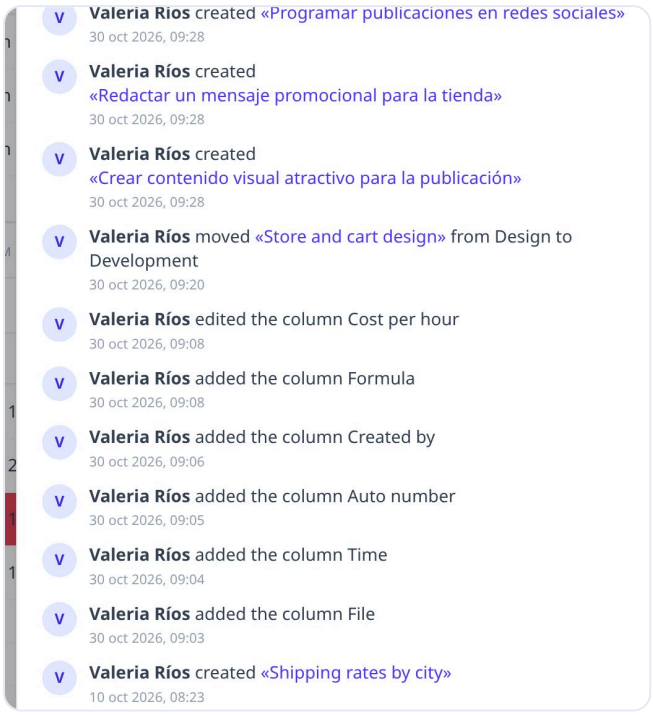
> **NOTE**
>
> At least one column has to go to Title (“Map at least one column to Title.”). If the file has more than 5,000 rows, the first ones are imported. Imported tasks fire the “When an item is created” automations.

CHAPTER 33

33 Activity log, archive and delete

What happened on the board, and what to do when it is over.

Activity log



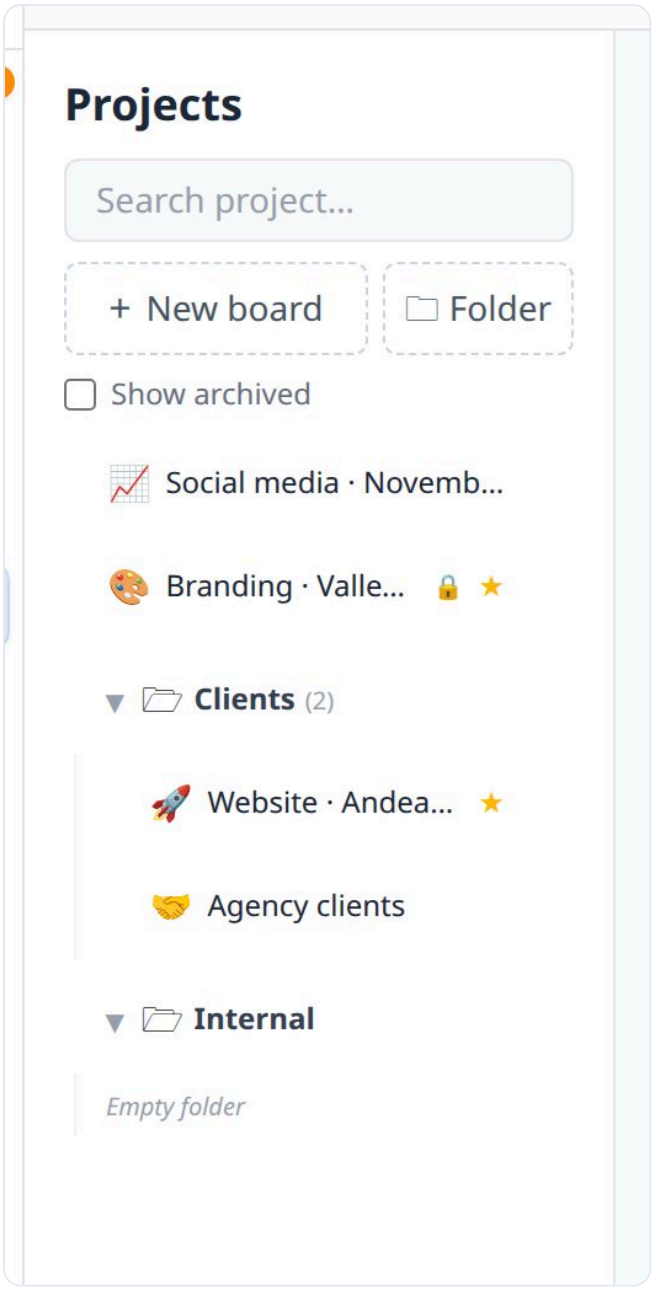
The board's Activity log, with its filters.

Shows everything that happened on the board, with who did it and when: people, **AI**, **Automation** (with the rule name), **System** or **API**.

Filter	What it shows
All	Every change.
Values	Cell changes, with the old and the new value.
Statuses	Status changes.
Assignments	Owner changes.
Created	New tasks, columns and groups.
Deleted	What was deleted.

Click a task to open its detail; **Load more** brings older entries.

Archive



In the list, the lock on private boards and the star on favorites.

Archive keeps a finished board out of the list, without deleting anything. Find it with **Show archived** (greyed out, tagged “Archived”) and restore it with **Unarchive**.

Delete

Delete removes the board with all its content: “Delete this board and all its content? This cannot be undone.”.

WATCH OUT

When in doubt, archive: an archived board comes back with one click; a deleted one does not.

NOTE

Archive, Unarchive and Delete only appear if you have the **Can delete and archive projects** permission: the owner and admins always do; an agent, if it was granted (chapter 46). Without it, Omnifox replies “You do not have permission to delete or archive projects. Ask the owner or an admin.”.

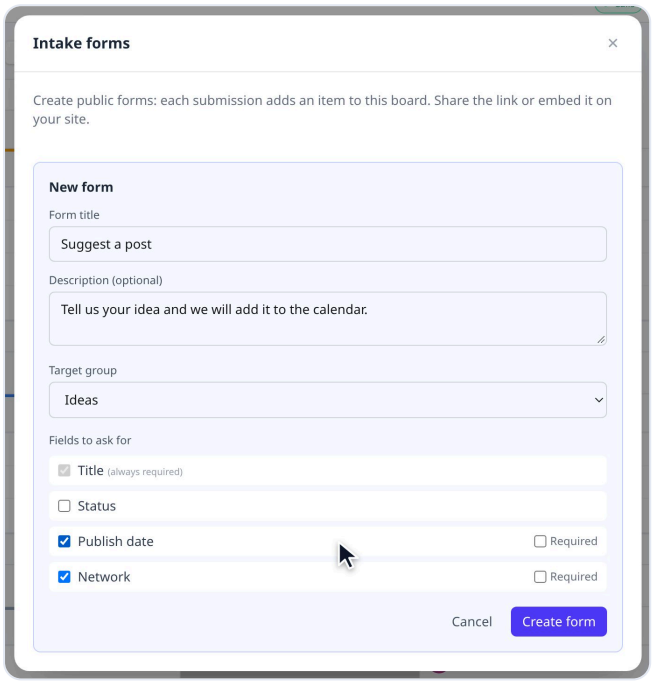
34

CHAPTER 34

Intake forms

Each submission becomes a task.

With **Forms** you create public forms: each submission adds a task to the board. Use them for client requests, design orders or team ideas.

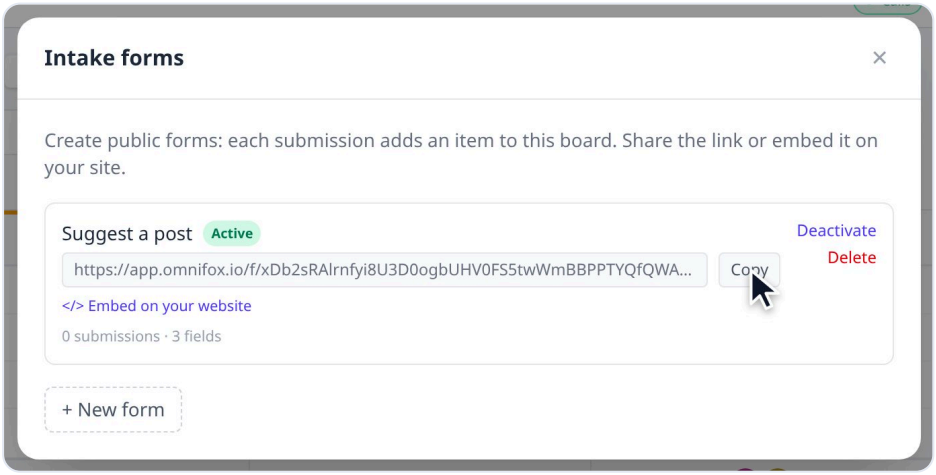


New form: title, description, target group and the fields to ask for.

1. Click **Forms** and then **+ New form**.
2. Type the **Form title** (e.g. “Suggest a post”) and a **Description (optional)**.
3. Choose the **Target group**, where tasks land (by default, the first group).
4. Under **Fields to ask for** tick the columns you want to ask and, for each one, whether it is **Required**. The task Title is always asked (“(always required)”).
5. Click **Create form**.

You can ask for Text, Link, Numbers, Money, Rating, Date, Email, Phone, Checkbox, Status, Priority and Dropdown columns.

The form list



The new form: link to copy, Embed on your website and the submission counter.

Element	What it does
Active / **Inactive**	Whether the form accepts submissions.
Public link and **Copy**	Copies the link to share it (“Copied!”).
</> Embed on your website	Shows the `<iframe>` code to paste into your page HTML, with its Copy button.
N submissions · N fields	How many responses arrived and how many fields it asks.
Deactivate / **Activate**	Pauses or resumes the form without losing the link.
Delete	“Delete this form? The public link will stop working.”

NOTE

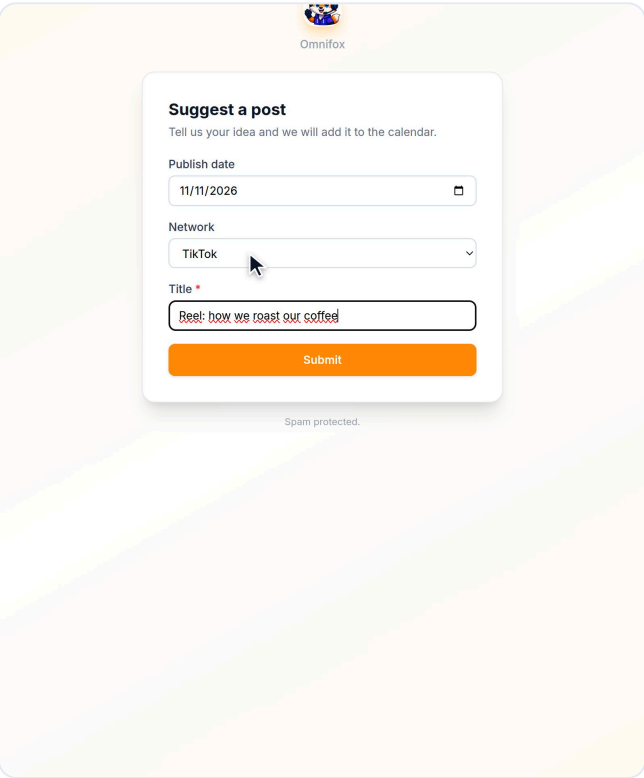
A form that has been created cannot be edited: to change its fields, create a new one and deactivate or delete the old one.

35

CHAPTER 35

The public form

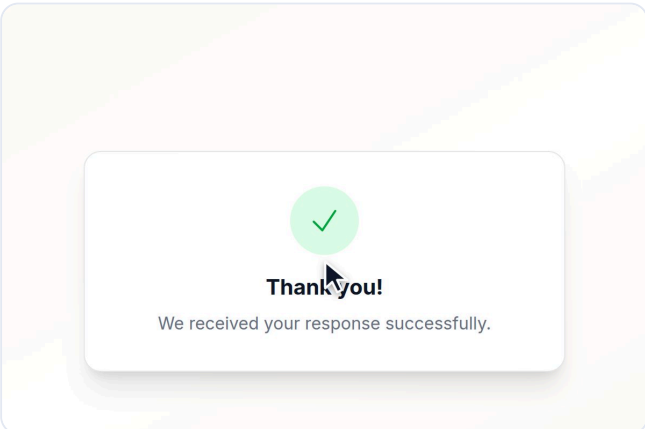
What your client sees, and what reaches the board.



The public form, as your client sees it.

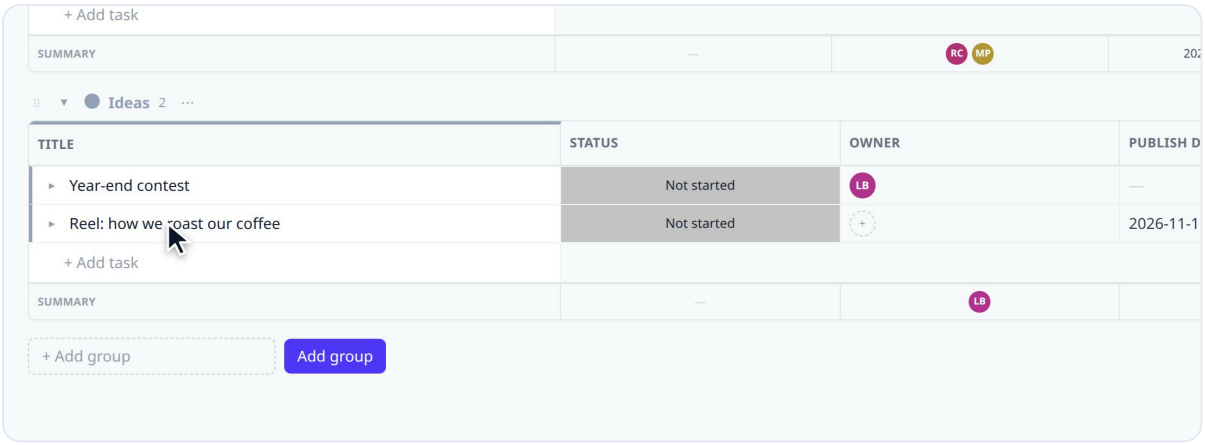
Your client opens the link (or the page where you embedded it), fills in the fields and clicks **Submit**. Each field shows the control of its type: number, date, email, phone, checkbox or a “Select an option...” picker.

- If a required field is missing: “This field is required.”.
- The form is “Spam protected.”.
- After submitting: “Thank you!” · “We received your response successfully.”.



The thank-you message after submitting.

On the board the new task appears in the chosen group, with the data they typed (if the title was left empty, it is called “New request”), and the submission counter goes up by one. The task fires the “When an item is created” automations: for example, notifying the person who reviews requests.



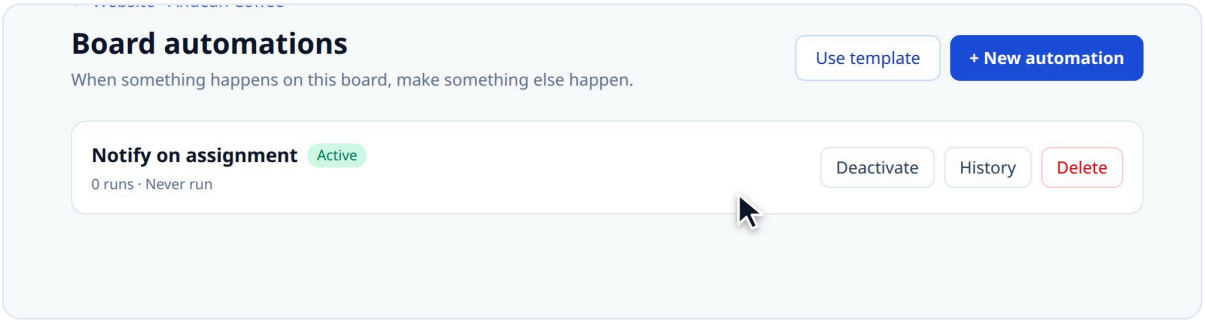
The request arrives as a new task in the chosen group.

36 Board automations

CHAPTER 36

When something happens, make something else happen.

Automate opens the **Board automations**: “when something happens, do something” rules that work for you. ← with the board name goes back to the board.

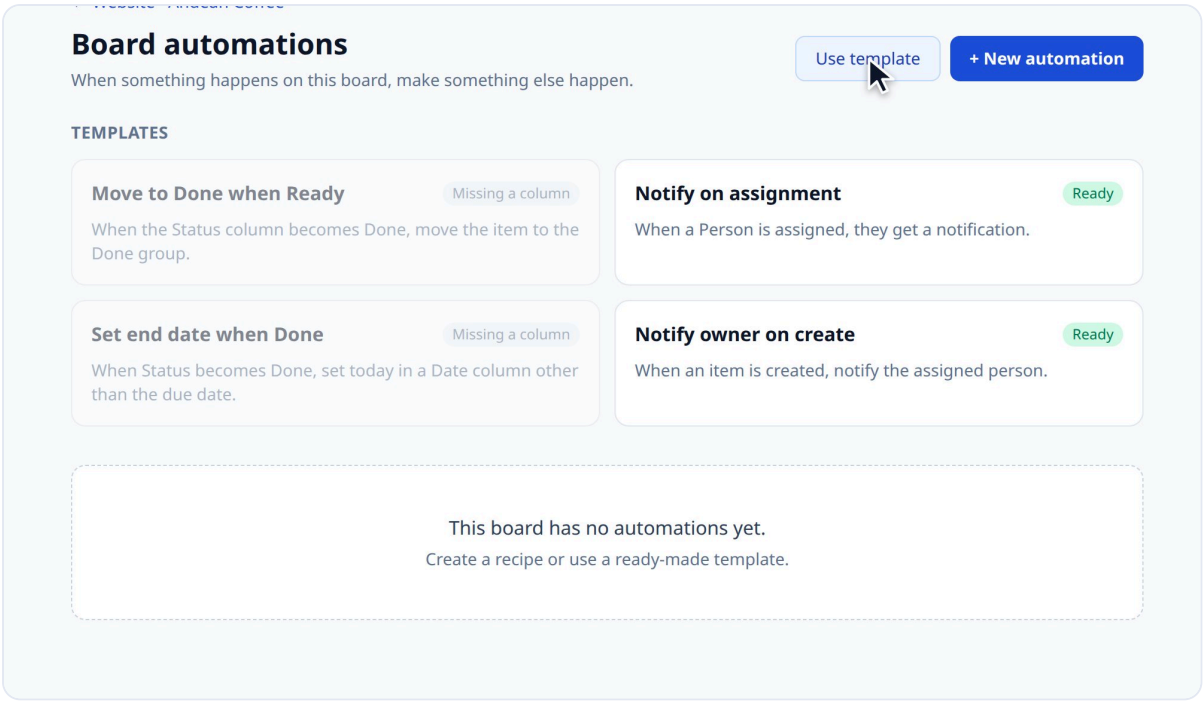


Board automations: each rule with its status, its runs and its buttons.

Each automation shows its name, whether it is **Active** or **Inactive**, how many times it ran and the date of the last run (or “Never run”), with the **Deactivate** / **Activate**, **History** and **Delete** buttons.

Use template

Four ready-made recipes. Each shows **Ready** if your board has the columns it needs, or **Missing a column**.



Use template: the four recipes, each one Ready or Missing a column.

Template	What it does
Move to Done when Ready	When the Status column becomes Done, move the item to the Done group.
Notify on assignment	When a Person is assigned, they get a notification.
Set end date when Done	When Status becomes Done, set today in a Date column other than the due date.
Notify owner on create	When an item is created, notify the assigned person.

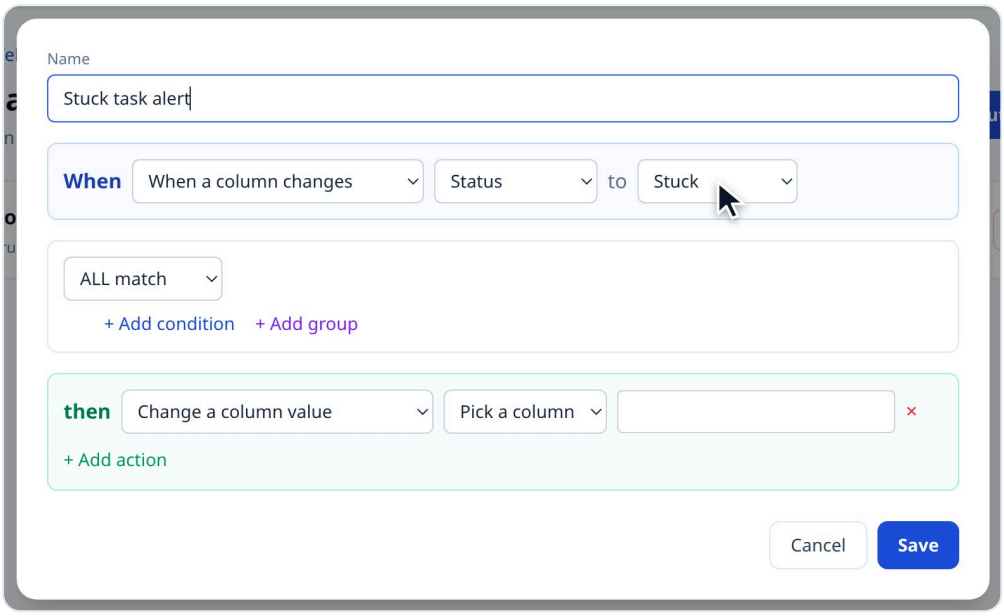
> **NOTE**
> “Set end date when Done” needs a Date column that is not the deadline (for example “Finished on”): so it does not overwrite the due date.

CHAPTER 37

37 Create an automation: the trigger

The editor reads like a sentence.

+ New automation opens the editor. First the **Name** (without one it stays “Untitled automation”); then **When**, the trigger; the conditions, optional; and **then**, the actions.



The trigger: when Status changes to Stuck.

Trigger	When it fires
When a column changes	Fires when a column value changes (optionally to a specific value).
When an item is created	Fires when a new item is created on the board.
When an item enters a group	Fires when an item moves into a specific group.

With “When a column changes” you choose the column and, after “to”, the value: **any value** or a specific one, with the column’s own picker (colored options, date, person…). In the example: when **Status** changes to **Stuck**.

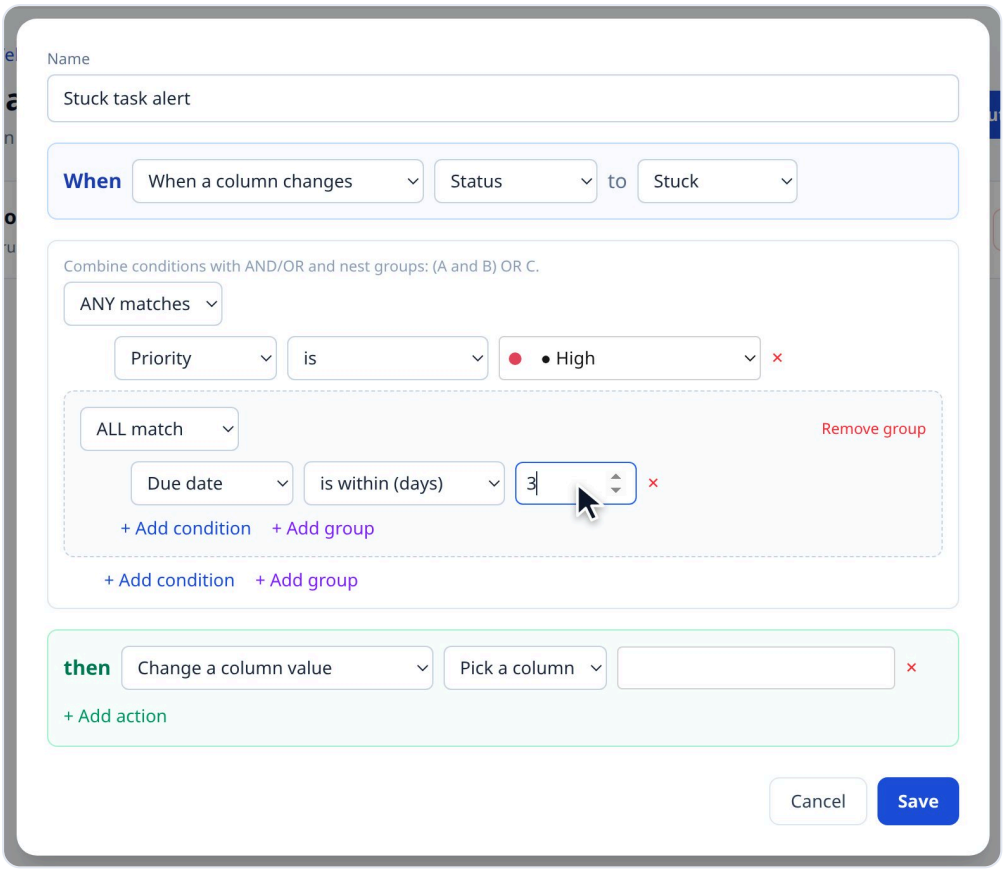
38

CHAPTER 38

AND/OR conditions

Decide when the rule acts.

Conditions filter when the automation acts. Click **+ Add condition** and build the row: column, operator and value (× removes it). The group selector decides how they are joined: **ALL match** (and) or **ANY matches** (or).



Conditions: High priority, or (nested group) due within 3 days.

With **+ Add group** you nest conditions, like in a formula: “Combine conditions with AND/OR and nest groups: (A and B) OR C.”. Each group has its own ALL/ANY and its **Remove group**. In the example, the rule acts if the priority is High **or** the task is due within 3 days.

The 17 operators

Operator	True when…
is	Equal to the chosen value.
is not	Different from the chosen value.
contains	The text includes what you type.
does not contain	The text does not include it.
starts with	The text starts like this.
ends with	The text ends like this.
is one of	Matches any of several values.
is set	The cell has some value.
is empty	The cell is empty.
includes	The chosen person is among the assignees.
is greater than	Greater number.
is less than	Smaller number.
is greater or equal	Greater or equal.
is less or equal	Less or equal.
is before	A date before the chosen one.
is after	A date after the chosen one.
is within (days)	The date falls in the next N days: type the number of days.

NOTE

The trigger's requirement ("changes to Stuck") is always checked first; then your conditions are evaluated with their ALL or ANY. If you edit an older automation, save it again so it picks up this logic.

TIP

Pick operators that make sense for the column: "is greater than" with numbers and money, "is before" with dates, "includes" with people.

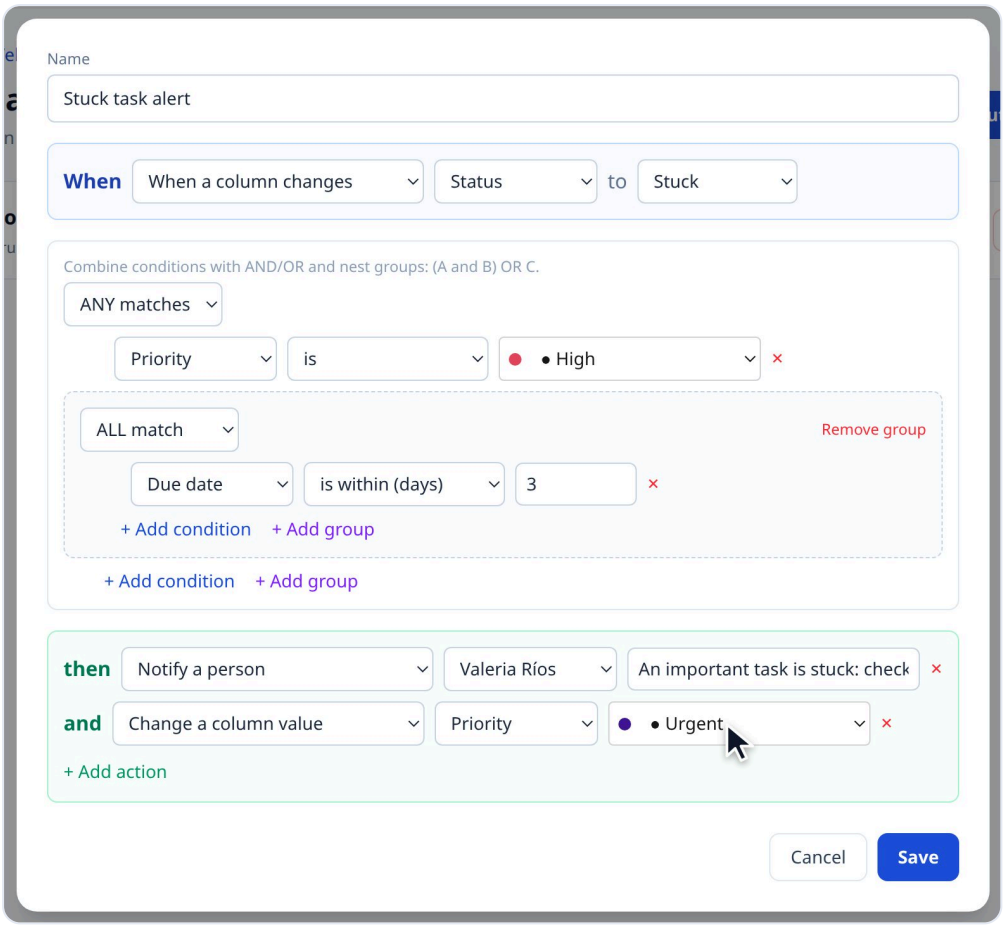
39

CHAPTER 39

The 18 actions

What the automation does, in order.

After **then** you choose the action in "Pick an action"; with **+ Add action** you add more, joined with **and**. They run **in order**, top to bottom, and each one is removed with its ×.



The actions, in order: notify Valeria Ríos and a second action joined with “and”.

#	Action	What it asks for
1	**Change a column value**	The column (read-only columns are not offered) and the value, with its type's own picker.
2	**Move to a group**	The destination group.
3	**Notify a person**	A person, or the person in an Owner column, and the **Message**. It is an in-app notice, in the bell.
4	**Create an item**	The **Title**, the group and whether it is created as a subtask of the task that fired the rule.
5	**Announce in a Team space**	The Team **Space** and the **Message**.
6	**Assign a person**	The **Person column** and one or more people.
7	**Set a date**	The **Date column** and **When**: Today, Today + N days or A date.
8	**Create a deal (CRM)**	**Deal title**, **Pipeline**, **Stage** and **Amount**.
9	**Update the deal (CRM)**	Title, amount and stage of the deal linked to the task.
10	**Log an activity (CRM)**	**Title** and **Note**, on the timeline of the linked contact or deal.
11	**Link to a record (CRM)**	**Link with** Deal or Contact and the **Record ID**.
12	**Email the customer**	**Subject** and **Message**; it goes to the contact linked to the task.
13	**Create a reminder (Team)**	**Person**, **Reminder** and in how many **Minutes**.
14	**Send a DM (Team)**	**Person** and **Message**.
15	**Schedule a Team message**	**Space**, **Message** and in how many **Minutes**.
16	**Call a URL (webhook / API)**	**Method** (GET, POST, PUT, PATCH or DELETE), **URL**, **Headers** and **Body**.
17	**Append row to Google Sheets**	Spreadsheet ID and sheet name (optional) and the **Cells**. Requires Google Sheets connected.
18	**Create/update HubSpot contact**	Email, First name, Last name, Phone and Company. Requires HubSpot connected.

The CRM, Team, email, Google Sheets and HubSpot actions connect the board with the rest of Omnifox and with your other tools. In the example, the rule notifies Valeria Ríos with a message and adds a second action.

> **WATCH OUT**
> Actions that use the contact or the deal (update the deal, log an activity, email the customer) need a task linked to a CRM record: through the inbox, a flow or "Link to a record (CRM)".

When you save, the editor checks that nothing is missing: "The automation needs a trigger before it can be activated.", "The column is missing.", "The group is missing.", "The message cannot be empty." or "The item title is missing.".

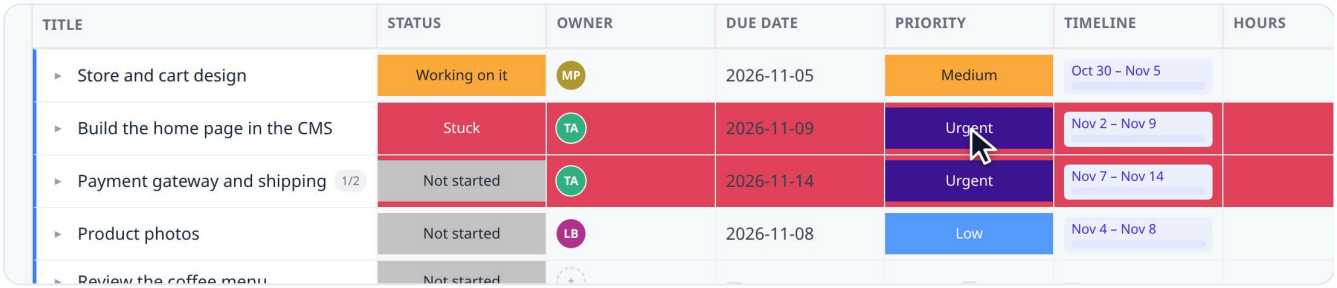
40

CHAPTER 40

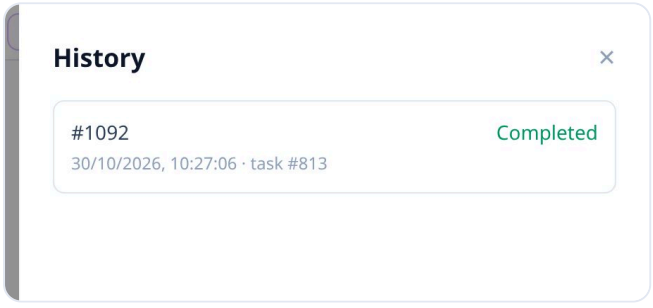
Test, history and pause

Check that it works and look at every run.

1. Click **Save**. The automation is **Active**.
2. Test it on the board: for example, set a High priority task to **Stuck**. The rule runs on its own.
3. Go back to Automations and click **History**.



The test on the board: the Stuck task with High priority fired the rule.



The automation History: the Completed run and its task.

The **History** lists each run with its number, the date and the task (“task #ID”), and its status:

Status	Meaning
Completed	It ran fine.
Failed	Something went wrong; the error message shows below.
Running / **Waiting** / **Pending**	It is still running or waiting its turn.
Cancelled	It stopped before finishing.

In the board’s Activity log, the changes made by the rule are signed by **Automation**, with its name. With **Deactivate** you pause it without deleting it; **Delete** removes it after confirming.

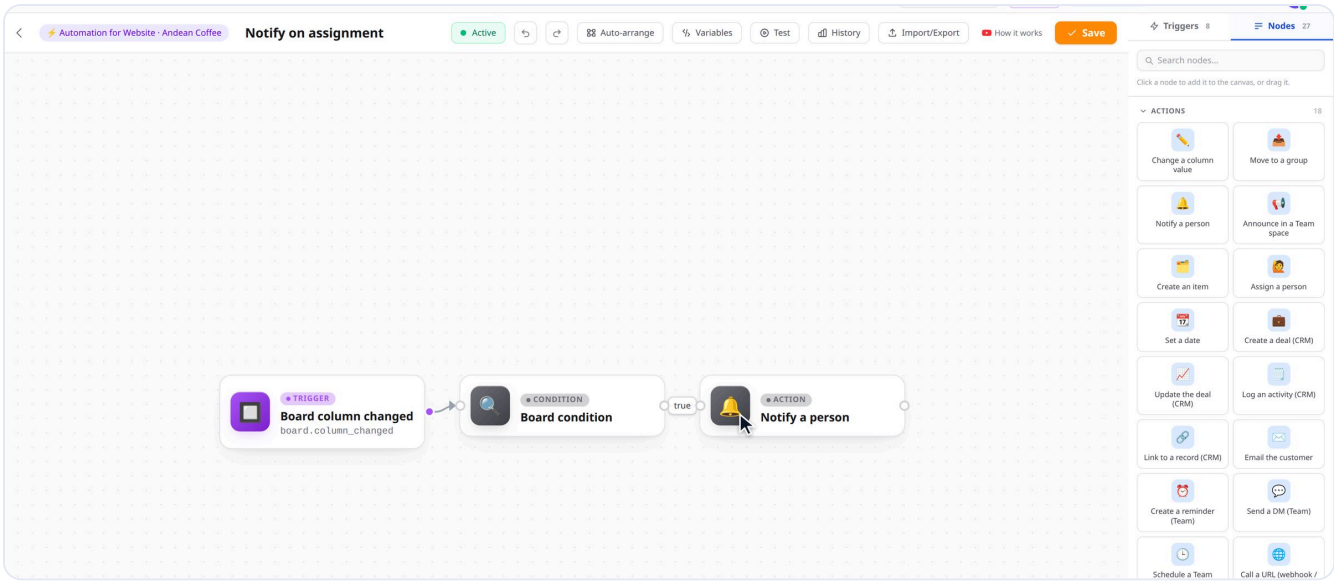
41

CHAPTER 41

Edit as a flow

When you need branches, waits and more steps.

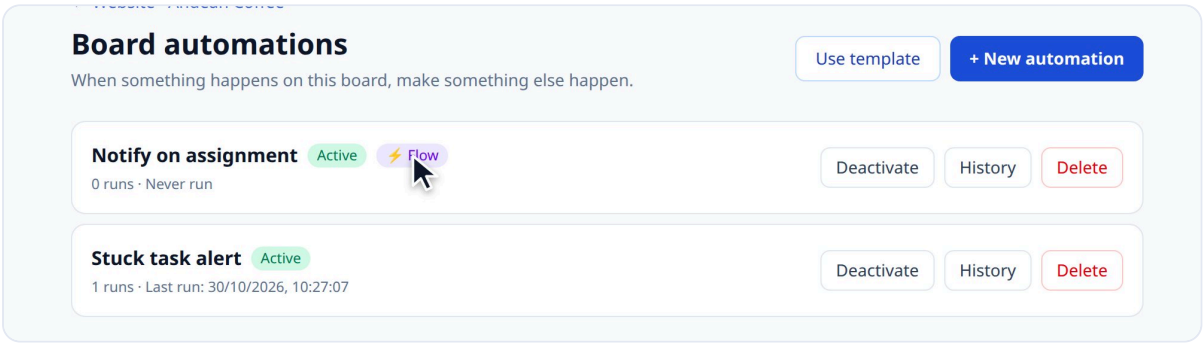
⚡ **Edit as a flow**, in the automation editor, opens it in the visual workflow editor, with the board nodes: yes / no branches, waits and passing data between steps.



Edit as a flow: the automation on the canvas, with the board nodes on the right.

WATCH OUT

The switch is one-way: “Once in flow mode, this automation is edited in the advanced editor and cannot return to the simple editor.”. In the list it carries the ⚡ **Flow** badge and a click always opens it on the canvas.



An automation switched to a flow carries the Flow badge.

Edit as a flow shows for people allowed to manage workflows. Board automations are not mixed into the general Workflows list: they live on their board.

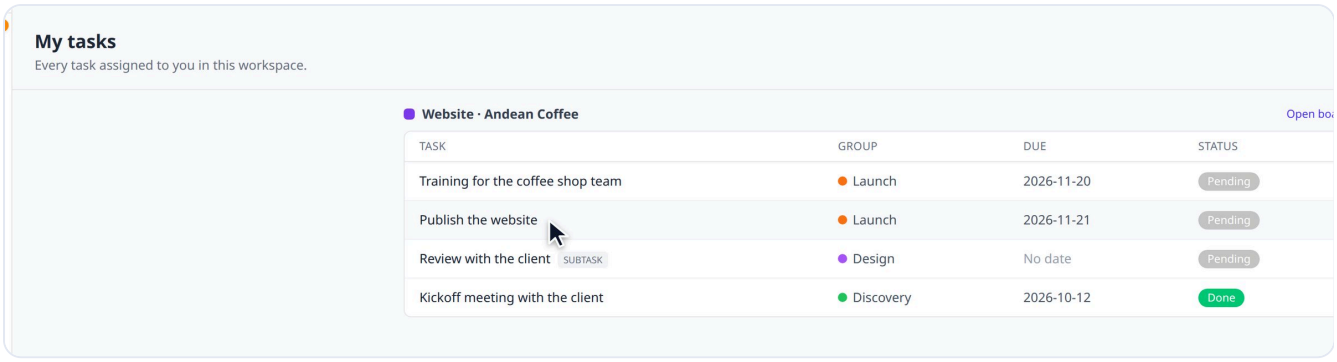
42

CHAPTER 42

My tasks

Everything that is yours, on a single screen.

My tasks, in the sidebar, gathers every task where you are the **owner**, across all the workspace boards, plus your CRM pending items (tasks, calls and meetings).



My tasks: the tasks assigned to Valeria, by board, with their group, due date and status.

Column	What it shows
Task	The name; subtasks carry the “Subtask” badge.
Group	The task’s group, with its color (or “No group”).
Due	The deadline (or “No date”).
Status	**Pending**, **Done** or **Overdue**.

Tasks are grouped by board, with the **Open board** link; CRM pending items show under “CRM · Tasks” with **Open Pending**. Clicking a task takes you straight to it, with its detail open. It is the screen to start your day.

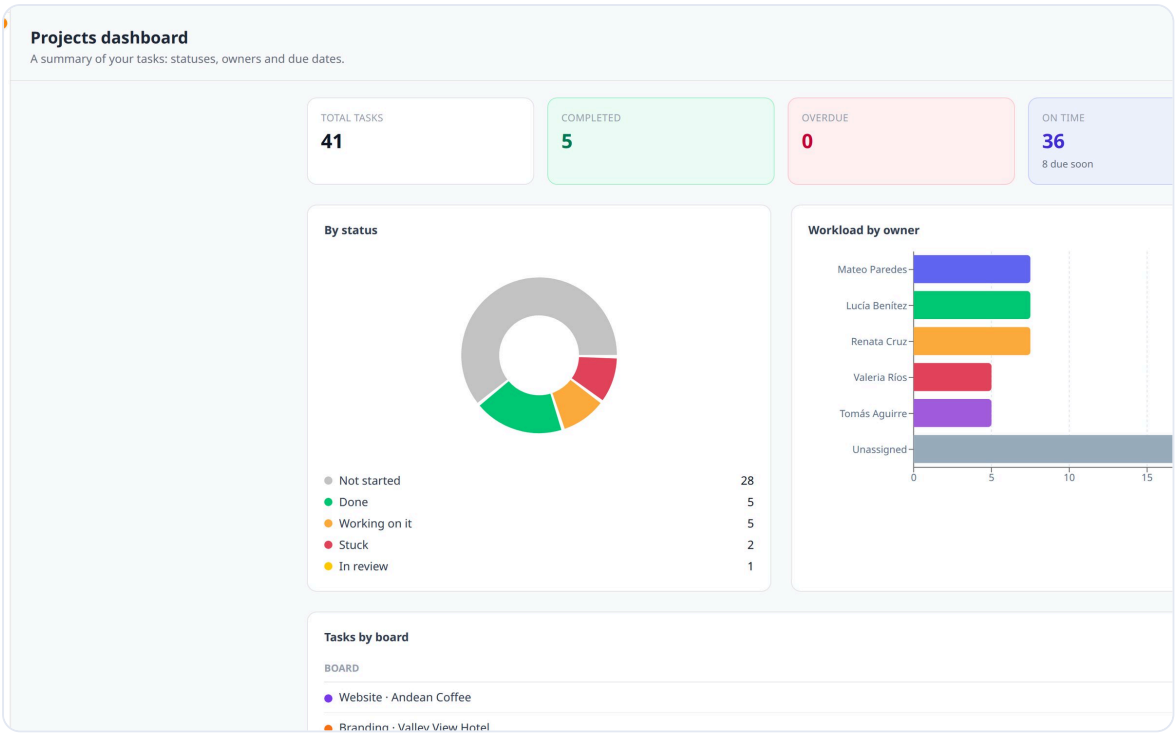
> **NOTE**
>
> If you see nothing: “You have no assigned tasks.”. The tasks where you are assigned in an Owner column show up here.

CHAPTER 43

43 The projects dashboard

The status of all your projects.

Under **Analytics** → Projects → **Dashboard**, the **Projects dashboard** summarizes your tasks: statuses, owners and due dates. Top right you choose **All boards** or a single one.



The Projects dashboard: indicators, By status, Workload by owner and Tasks by board.

Part	What it counts
Total tasks	The main tasks (no subtasks).
Completed	With a final state.
Overdue	With the deadline passed and not completed.
On time	The rest; below, how many are **due soon** (next 7 days).
By status	A pie chart with the colors of the first Status column; tasks without a status count as “Not started”.
Workload by owner	Bars per person, plus “Unassigned”. A task with two people counts for both.
Tasks by board	How many tasks each board has.

NOTE

Private boards only count for people who can see them: each person sees the dashboard of what is within their reach.

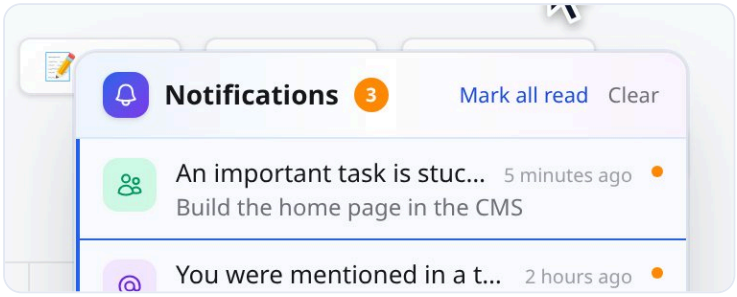
44

CHAPTER 44

Notifications

We tell you what matters.

Projects notifies you in the Omnifox **bell** and in the **mobile app**. Clicking the notice opens the board with the task open.



The automation's notice in the bell.

Notice	When it arrives
You were assigned a task	When someone assigns you in an Owner column with **Notify on assignment** (chapter 12).
You were mentioned in a task	When someone mentions you with @ in an update (chapter 27).
Task due soon / **Task overdue**	Every morning (8:10), to the owners of uncompleted tasks whose deadline is coming up (24 h before, or the column's "Days before") or has passed. Once per task per day.
An automation message	The "Notify a person" action (chapter 39).

Each person chooses which notices they get in their notification preferences. Projects does not send emails to your team; the "Email the customer" action writes to the client's contact.

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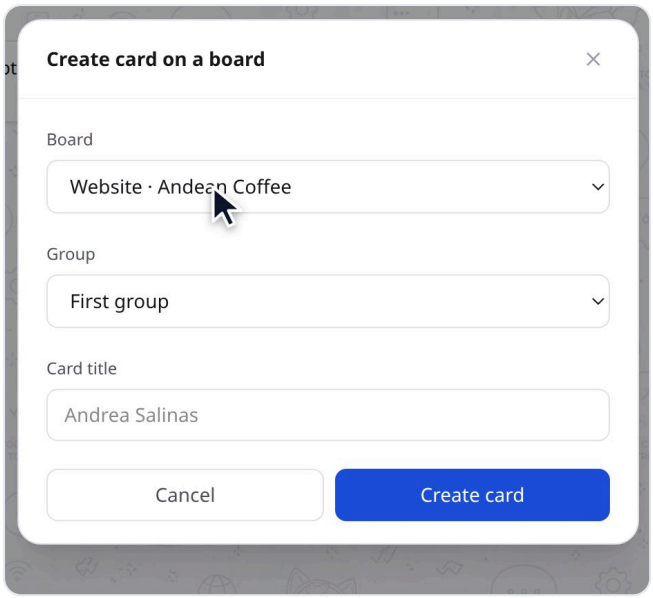
CHAPTER 45

From the inbox and other integrations

Projects, connected with your clients.

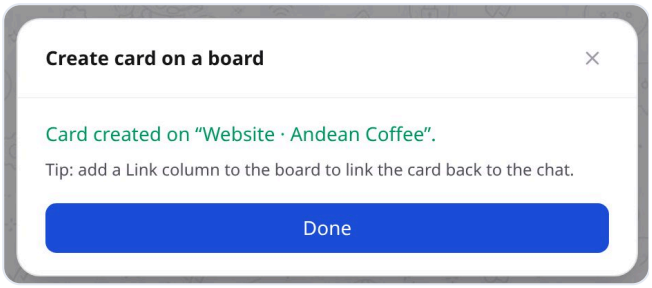
Create board card

In the inbox, in the **Tools** menu of the chat header, **Create board card** creates a task with the conversation's contact.



In the inbox: Create card on a board, with the conversation's contact.

1. Choose the **Board** and the **Group** (by default, "First group").
2. Check the **Card title**: it comes with the contact's name.
3. Click **Create card**: "Card created on "Website · Andean Coffee".".



The card is created, with the tip to add a Link column.

The card is linked to the contact and fills in the first empty **Phone**, **Email** and **Link** column (with the link to the conversation) on its own, if the board has those columns. If there is no Link column, Omnifox suggests it: "add a Link column to the board to link the card back to the chat.". So the client's request is never lost.

More integrations

With	What you can do
Calendar	"Schedule meeting" from the task menu; when booking an appointment, link it to a "Board card" among the ones assigned to you; appointments can create their card.
CRM	Link tasks to contacts and deals; create or update deals and log activities from automations; your CRM pending items in My tasks.
Workflows	Nodes to create a project when you win a deal, or a card from a conversation or an appointment.
Team	Announcements in spaces, direct messages, reminders and scheduled messages from automations.
Other tools	Call a URL or API, Google Sheets and HubSpot from automations.
API and SDK	The Omnifox API and its SDKs handle boards, tasks and columns, with read or write projects tokens.

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CHAPTER 46

Permissions and plans

Who can do what, and in which plans.

Plans

Projects is included in the **Crece**, **Escala** and **Exclusivo** plans. With them you get every column type (including the Advanced ones), the five views, forms and automations. Generating tasks with AI uses the plan's AI credits.

Permissions

Task	Who can
See and use public boards: create tasks, columns and groups, and edit them	Every workspace member.
Archive, **Unarchive** and **Delete** a board	The owner and admins, always. An agent or a supervisor, only with the **Can delete and archive projects** permission.
See a private board	Its owner, the admins and the invited people.
Delete an update	Its author and the admins.
Edit as a flow an automation	Whoever is allowed to manage workflows.
Schedule meeting from a task	Everyone, if the workspace uses the Calendar.

> **TIP**
> The whole team can edit public boards: use **Private** for sensitive work. And before deleting, think **Archive**.

The permission to delete and archive projects

Deleting or archiving a board is a separate permission: **Can delete and archive projects**. The owner and admins always have it. Agents and supervisors don't, unless you grant it to a specific person:

1. Go to **Settings** → **Members** (the account owner does this).
2. On the person's row, click **Manage workspaces**.
3. Tick **Can delete and archive projects**. The change applies right away; to take it back, untick the box.

For an admin, the box is ticked and locked: "Admins can always delete and archive projects.". Without the permission, **Archive**, **Unarchive** and **Delete** don't appear in the board menu.

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CHAPTER 47

Best practices and troubleshooting

So your boards work for you.

Best practices

	Practice
1	One board per project or process, and **templates** for what repeats.
2	Few columns, but well chosen: a **deadline** and an **owner** on every task.
3	Use the **final state** to measure progress: it feeds Workload, My tasks and the dashboard.
4	Use **dependencies** for the order and the **Gantt** to see whether stages overlap.
5	Automate the repetitive: notices, group moves and dates.
6	Take requests with **forms** and from the **inbox**: nothing stays buried in the chat.
7	Talk in the task **updates** and mention with @: the context stays with the work.
8	**Archive** what is finished to keep the list clean.

Troubleshooting

Problem	What to check
I do not see Projects	That your plan includes it (Crece, Escala or Exclusivo) and that you are in the right workspace.
A board is missing	It may be private (ask its owner or an admin for access), archived (Show archived) or inside a collapsed folder.
The assignment notice does not arrive	Turn on **Notify on assignment** in the Owner column and check your notification preferences.
The due date notice does not arrive	The column needs **Use as deadline**; the task, an owner, and it must not be completed.
A view is missing tasks	Check for an active search or filter: they apply to every view.
The Calendar or the Gantt is empty	Add a date or timeline column and fill in the dates.
A column disappeared	It may be hidden: look for it in **Hidden columns (N)**.
An automation does not run	That it is **Active**, that the template says Ready, and check its **History**: the error shows there.
The form gets no submissions	That it is **Active** and that you share the current link (if you deleted it, the link stopped working).
A formula shows #ERROR	Open the Formula editor and look at the preview: it tells you where the error is.

48 CHAPTER 48 Glossary and FAQ

Glossary

Term	What it is
Board (project)	A workspace with tasks, groups and columns.
Group	A set of tasks within the board: a stage, a week, an area.
Task (item)	A row of the board.
Subtask (subitem)	A step inside a task, with its own columns.
Column	A type of data each task has: status, date, person, money...
Final state	The Status option that marks the task as completed.
Deadline	The Date or Timeline column Omnifox watches for due dates.
View	Each way to see the board: Table, Kanban, Calendar, Gantt or Workload.
Summary footer	The row at the bottom of each group that summarizes each column.
Conditional formatting	Rules that color cells or rows based on a condition.
Formula	A column computed from others.
Connect / Rollup / Mirror	Link tasks across boards, compute over them or show their values.
Dependency	A task that must be completed before another.
Update	A team message inside the task.
Intake form	A public page whose submissions create tasks.
Automation (recipe)	A board rule: “when something happens, do something”.
Trigger	What starts an automation.
Flow mode	An automation edited in the visual workflow editor.
Template	A saved board used to create identical ones.

Frequently asked questions

How many boards can I have?

As many as you need. Organize them with folders and favorites, and archive the finished ones.

Can my client see the board?

No: boards belong to your workspace team. To have your client send you information, use an intake form.

Can I change the Status options?

Yes, with **Edit options**: names, colors, order, the default option and which is the final state.

How do I see a column I hid again?

With **Hidden columns (N)**, in the board bar: click **Show** next to the column.

Can I share a task with a teammate?

Yes: **Copy task link** in its menu. The link opens the board with the task open.

Why does the Kanban not have one column per status?

Because its columns are the groups. Set up your groups as stages and move the cards between them.

Can I group by owner or save a filtered view?

Tasks are always grouped by group and filters are not saved. To see one person's work, use the person filter, the Workload view or My tasks.

Does AI fill in dates and owners?

No: it generates the task titles in the group you choose. Then you assign them and set their dates.

Can I edit a form that is already created?

No: create a new one with the fields you want and deactivate the old one.

Do automations use my balance?

Board automations do not use AI. Actions that call other tools (Google Sheets, HubSpot, a URL) need those connections.

Can I turn a flow-mode automation back into the simple editor?

No, the switch is one-way. If you want the simple version, create a new automation.

What happens to the tasks if I delete a group?

You choose: move them to another group or delete them along with the group (if there is no other group, you can also keep them without a group).

How do I bring my tasks from another tool?

Export a CSV from it and import it with **Import CSV**, in the board menu.

Does it work on a phone?

Yes: in the phone browser you see one panel at a time, and notices also reach the Omnifox app.

Need help?

Write to us from the **Support** button in the app or visit the help center at omnifox.io/help. If you do not use Omnifox yet, try it free for 7 days at **omnifox.io**.