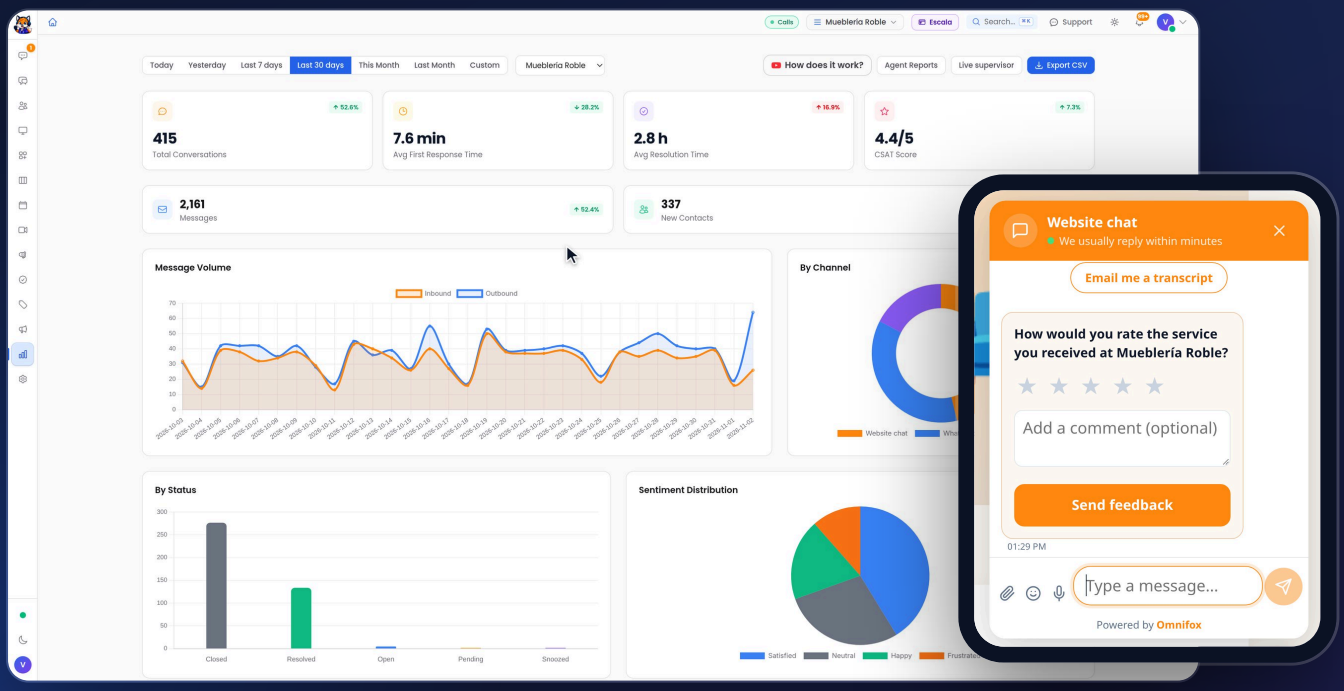
Omnifox

REPORTS · COMPLETE GUIDE

Reports

The numbers behind your customer service: how many people write to you, through which channel, at what time, how fast your team replies and how happy they are. The overview, the agent report, the satisfaction survey, team quality, the live supervisor, CSV export and the reports that arrive by email on their own.



CONTENTS

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How to read this manual

The screenshots are real Omnifox screens with a sample business: **Mueblería Roble**, a fictional furniture store in Quito that serves customers through its website chat, WhatsApp and Instagram. Its team is four people: **Lucía Benítez**, **Mateo Paredes** and **Tomás Aguirre** (agents) and **Valeria Ríos** (admin). The eight weeks of history in this workspace are **demo data**; today's activity is real website chat activity. The customers and conversations are made up.

Button, field and card names are in **bold**, exactly as they appear on screen (with the app in English). This manual follows, chapter by chapter, the «Reports · Complete guide» video and expands it with every option. Reports are visible to the owner, admins and supervisors (chapter 28).

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01

CHAPTER 1

What Reports are and how to open them

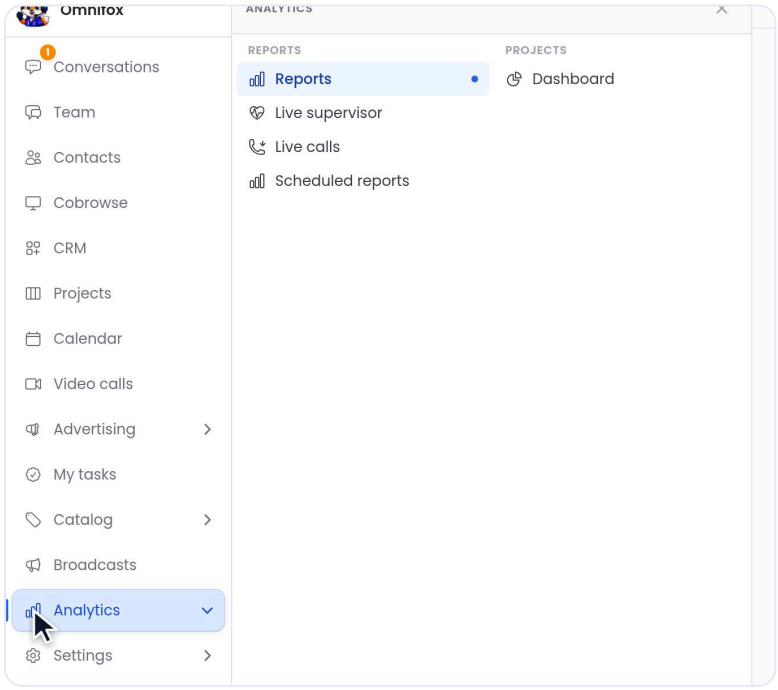
All the numbers of your customer service, calculated on the fly from your real conversations.

Reports answer the questions every business owner asks: how many people write to me? Through which channel? At what time? How long does my team take to answer? Are customers happy? There is nothing to prepare and no data to load by hand: Omnifox calculates them when you open the screen, from the conversations, messages, contacts and surveys of the workspace.

Where they are

In the left sidebar, open **Analytics**. Inside you will find, among other options:

Option	What it is	Chapters
Reports	The overview: filters, six cards with the key numbers, charts and the team table. The agent report opens from here.	1 to 16
Live supervisor	What is happening right now: open conversations, SLA, calls and each agent's workload.	22 to 25
Scheduled reports	The overview delivered by email on its own, every day, week or month.	27

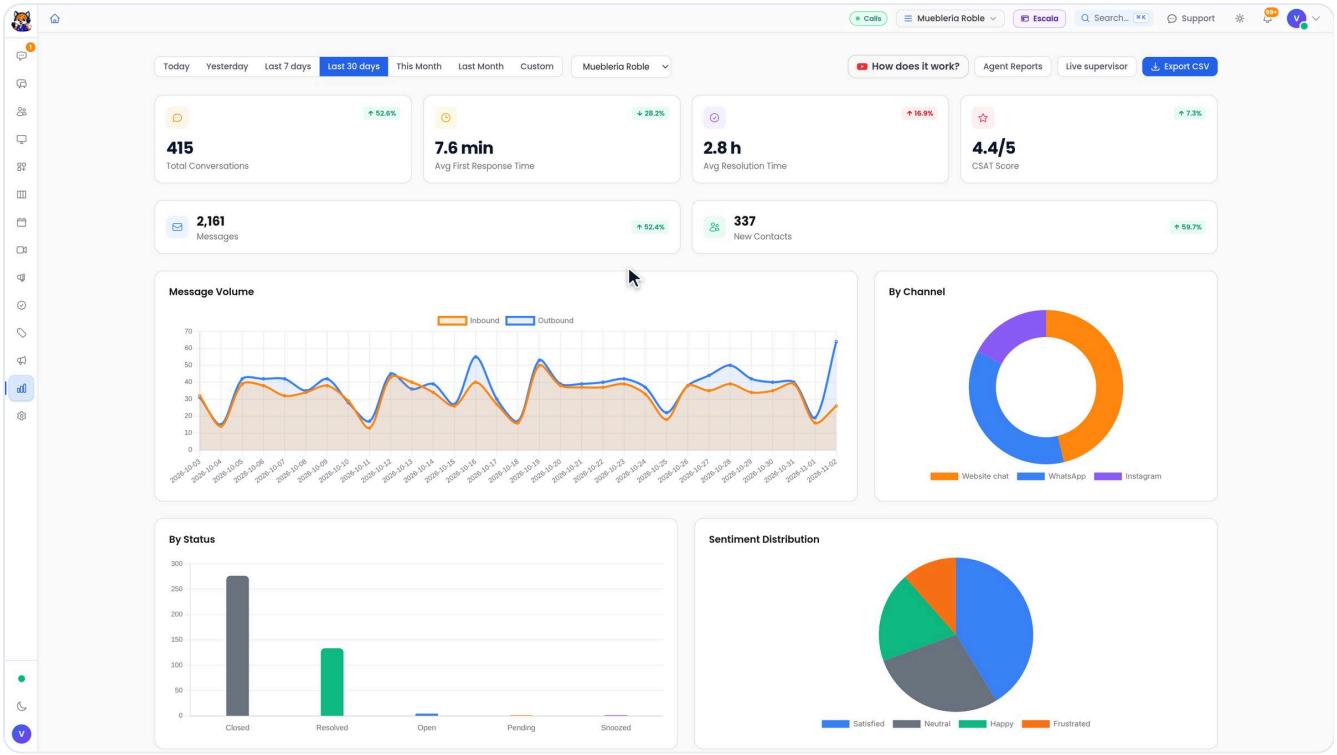


Analytics, in the left sidebar: Reports, Live supervisor and Scheduled reports, among other options.

1 In the left sidebar, click **Analytics**.

2. Choose **Reports**. The overview opens with the **Last 30 days** period selected.
3. Change the period or the workspace with the filters at the top (chapters 4 to 6).

The screen map



Analytics → Reports: the filters at the top, the six cards and, below, the charts.

Area	What it contains
Filter bar	The date shortcuts (**Today**, **Yesterday**, **Last 7 days**, **Last 30 days**, **This month**, **Last month**, **Custom**) and the workspace selector.
Buttons on the right	**Agent Reports** (chapter 15), **Live supervisor** (chapter 22) and **Export CSV** (chapter 26).
Cards	**Total Conversations**, **Avg First Response Time**, **Avg Resolution Time**, **CSAT Score**, **Messages** and **New Contacts** (chapter 3).
Charts	**Message Volume**, **By Channel**, **By Status**, **Sentiment Distribution**, **Contact Growth**, **Top Tags**, **First response time distribution** and **Messages by Day & Hour** (chapters 8 to 13).
Team table	**Agent Performance**, with the **View Details** link (chapter 14).

> **TIP**
> Everything you see depends on two filters: the period and the workspace. If a number looks odd, first check which period is selected (the blue button) and which workspace appears in the selector.

02

CHAPTER 2

Conversations, statuses and channels

Three ideas worth having clear before reading the numbers.

The conversation

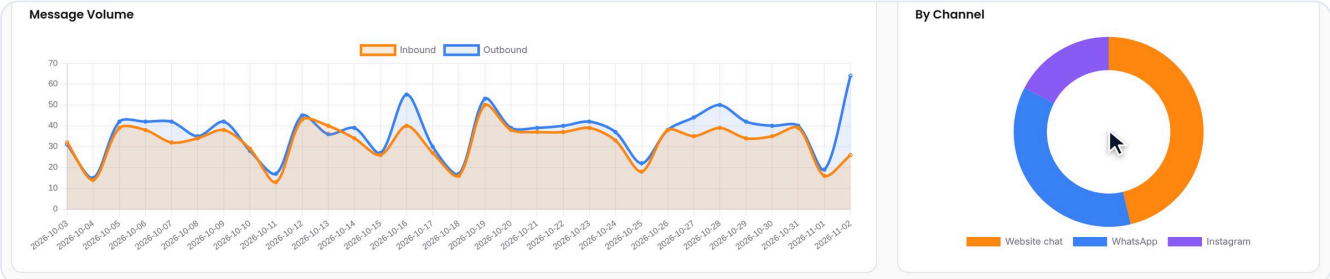
A **conversation** is each thread with a customer: it starts when they write and ends when your team closes or resolves it. If the same customer writes again days later, a new conversation may open. Almost every report metric is counted per conversation: the total, the times, satisfaction and each agent's workload.

The statuses

Status	What it means
Open	In progress: the customer is waiting for something from your team.
Pending	Your team is waiting for the customer (for example, to send a photo or confirm an order).
Snoozed	Set aside to pick up later.
Resolved	The reason for the conversation was solved.
Closed	The conversation is over.

The channels

Each conversation arrives through a **channel**: your website chat, WhatsApp, Instagram, Messenger, email and any others you have connected. Reports show the channels that actually had conversations in the period; at Mueblería Roble, the website chat, WhatsApp and Instagram.



The conversations of the period, by day (messages) and by channel.

How dates are counted

- **Conversations** are counted by the **date they started**. A conversation that started on the 30th and was closed on the 2nd counts for the 30th.
- **Messages** are counted by the **date they were sent**.
- **New contacts**, by the date they first appeared.

That is why, when you change the date filter, every card and every chart changes at once.

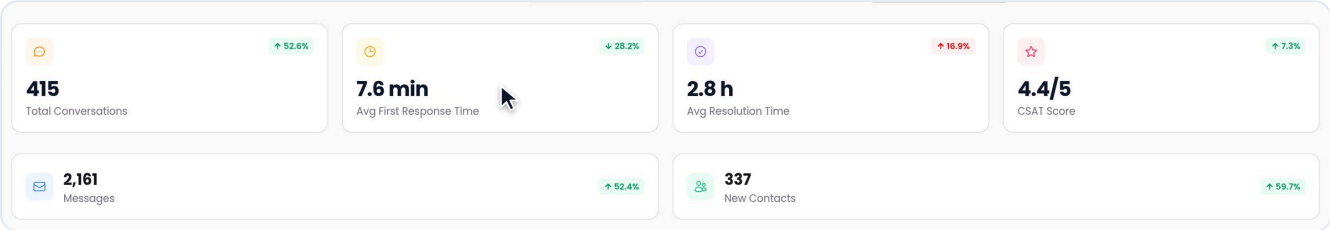
> **NOTE**
> Days are cut at midnight in your workspace time zone, not the server time zone (chapter 5).

03

CHAPTER 3

The overview cards

Six key numbers, right at the top, to see at a glance how your service is doing.



The six overview cards, each with its trend pill.

Card	What it measures	How to read it
Total Conversations	The conversations that started in the period.	Your workload. If it goes up a lot, you may need more people or more automation.
Avg First Response Time	How long a customer waits from writing until a person answers for the first time.	Lower is better. It is what the customer feels most.
Avg Resolution Time	From the start of the conversation until it is resolved.	Lower is better. If it goes up, some cases are dragging on.
CSAT Score	The average rating of the satisfaction survey, out of 5.	Higher is better. It needs the survey turned on (chapter 17).
Messages	The total messages in the period, inbound and outbound.	The daily detail is in Message Volume (chapter 8).
New Contacts	People who wrote to you for the first time in the period.	How fast your customer base grows.

Times are shown in the handiest unit: seconds or minutes (**7.8 min**) when they are short, hours (**2.6 h**) when they are long. Each card has a **pill** at the top right with the change against the previous period (chapter 7).

> **WATCH OUT**
> The average first response can go up a lot because of a few conversations that arrived at night and waited for hours. To see the real shape, look at the First response time distribution (chapter 12).

04

CHAPTER 4

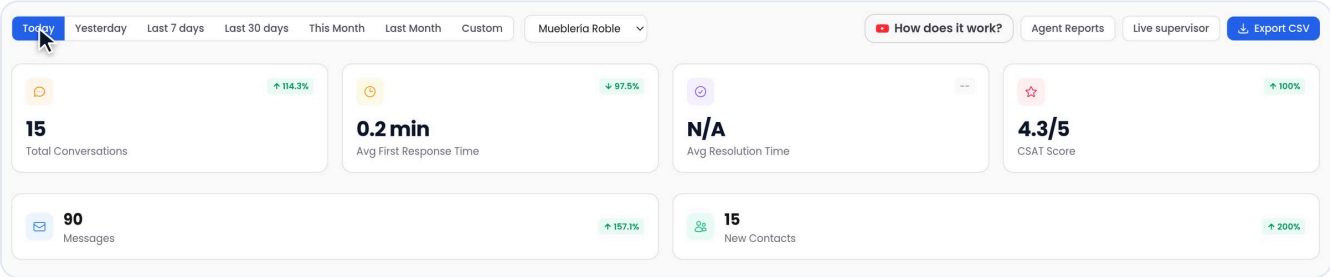
Date filters

One click on a shortcut and the whole report is recalculated for that period.

The shortcuts

Shortcut	Period covered
Today	From 00:00 today until now.
Yesterday	The whole of yesterday.
Last 7 days	The last week, up to today.
Last 30 days	The last rolling month, up to today. It is the period the overview opens with.
This month	From the 1st of the current month until today.
Last month	The previous calendar month, complete.
Custom	The range you choose.

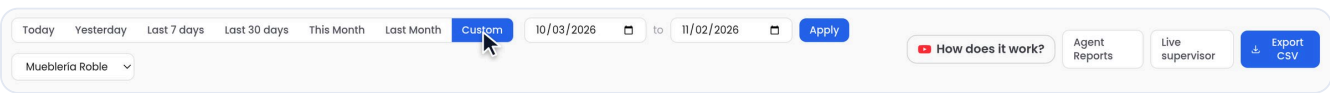
The selected shortcut is shown in blue. When you click another one, the cards, charts and team table are recalculated instantly.



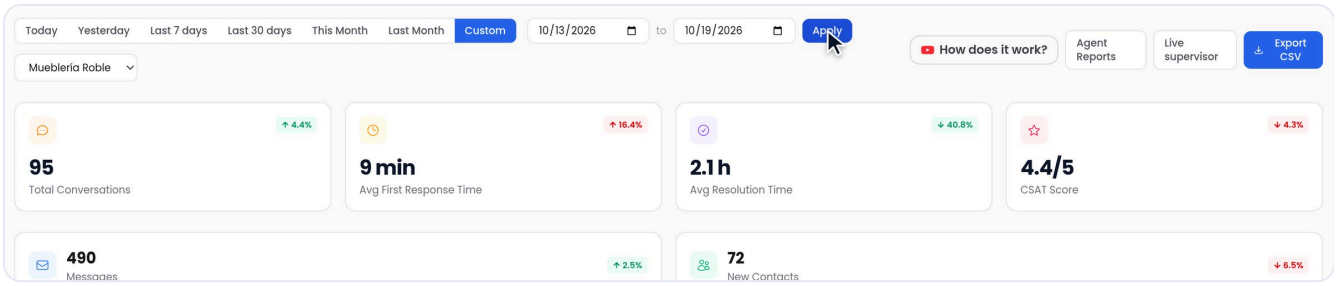
With the Today shortcut, everything is recalculated with today's activity only.

A custom range

1. Click **Custom**. Two date fields appear.
2. Choose the start date in the first field and the end date in the second.
3. Click **Apply**.



Custom: the From and To fields and the Apply button appear.



A custom range applied: the cards and charts cover only those dates.

What each one is for

- **Today** and **Yesterday**: the daily check; for what is happening right now, the Live supervisor is better.
- **Last 7 days**: the Monday review (chapter 30).
- **Last month**: the month-end close, to export to CSV and keep (chapter 26).
- **Custom**: to compare, for example, the week of a promotion with a normal week.

> **NOTE**
>
> With short periods, such as Today, some cards may show N/A: there is not enough data to calculate them yet (for example, no conversation resolved so far).

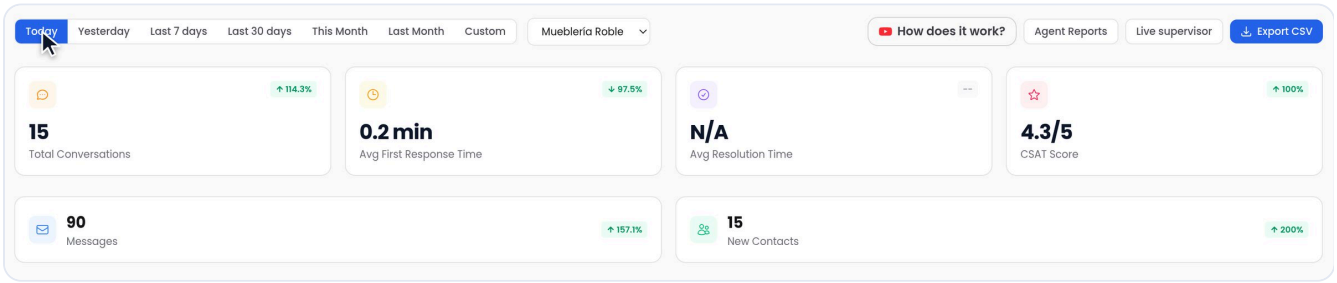
05

CHAPTER 5

The time zone of the reports

Days are cut at midnight in your time zone, not the server's.

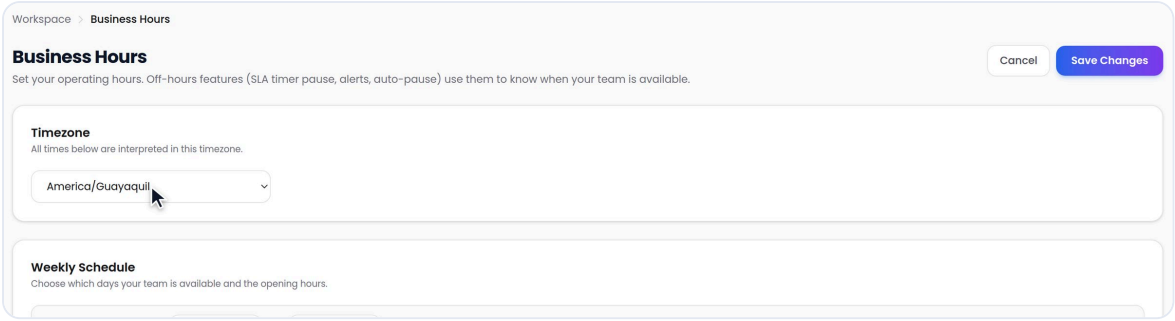
A report has to know when each day starts and ends. Omnifox uses the **workspace time zone**: Mueblería Roble is in Quito, so «Today» starts at 00:00 Quito time and a message sent at 23:30 Quito time counts for that day, even if it is already the next day in another country.



«Today» starts at 00:00 in the workspace time zone (here, Quito).

Where the time zone comes from

The time zone comes from the workspace **business hours**: **Settings** → **Business hours**, **Time zone** field. It is the same time zone used by the business hours and by the automations that depend on them.



Workspace settings: the time zone is set in the workspace business hours.

1. Open the workspace **Settings**.
2. Go to **Business hours**.
3. Check that the **Time zone** is your business's and save if you changed it.

What depends on the time zone

- Which conversations and messages fall on each day of the period.
- The **Today**, **Yesterday**, **This month** and **Last month** shortcuts.
- The hours of the **Messages by Day & Hour** heat map (chapter 13).

> **WATCH OUT**
>
> If your team works in a different country from your business, the time zone must be the business's: it is the time your customers write. A wrong time zone shifts the whole heat map by a few hours and makes the peaks show up where they are not.

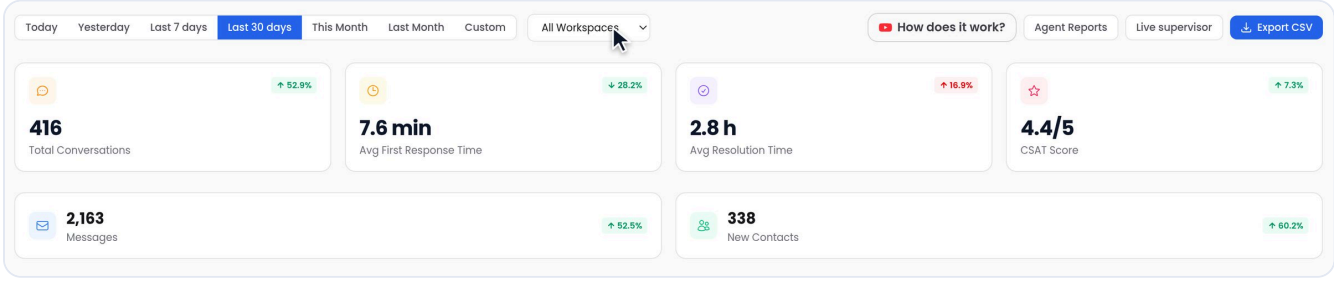
06

CHAPTER 6

Filter by workspace

One workspace, or all of yours together.

The selector to the right of the shortcuts picks the **workspace** of the report. If your organization has several (for example, one branch per city, or Sales and Support separately), you can see just one or all of them together.



«All Workspaces»: the unified view only adds up the workspaces you belong to.

Option	What it shows
The name of a workspace (for example, **Mueblería Roble**)	That workspace only.
All Workspaces	The unified view: the sum of the workspaces you belong to.

- The all-workspaces view adds up **only your workspaces**: nobody sees numbers from a workspace they have no access to.
- Contacts, surveys and tags are also filtered by the chosen workspace.
- The date filter is kept when you switch workspace.

> **NOTE**
> If the numbers of the unified view are somewhat higher than those of your main workspace, that is normal: they also add the activity of your other workspaces.

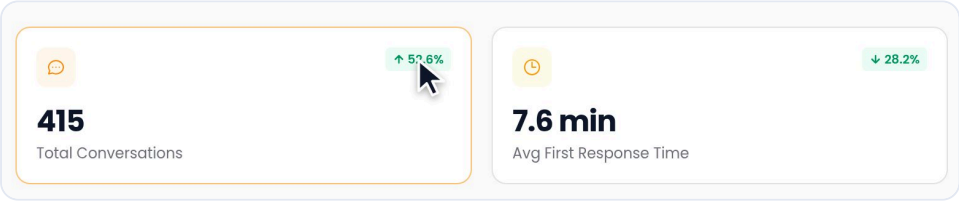
07

CHAPTER 7

Trends versus the previous period

Each card tells you whether you are doing better or worse than before.

Each card has a **pill** with the percentage change against the **previous period of the same length**. If you look at the last 30 days, they are compared with the 30 days before; if you look at Yesterday, with the day before; if you choose a custom range of 10 days, with the 10 days before.

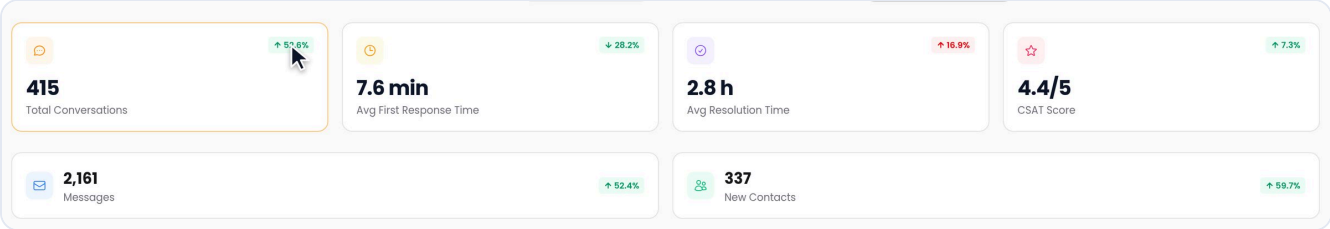


Each card's pill: the percentage change against the previous period of the same length.

The colors

Card	Goes up	Goes down
Total Conversations, Messages, New Contacts	Green	Red
CSAT Score	Green	Red
Avg First Response Time	Red (you reply more slowly)	Green (you reply faster)
Avg Resolution Time	Red	Green

Green always means «better» and red «worse». For times, **going down is good**: if the first response drops 8.5%, the pill is green with the arrow pointing down.



Green is good and red is bad. For times, going down is good: that is why the first response goes down and shows in green.

> **NOTE**
> If there was no data in the previous period (for example, the workspace is new), the card shows no percentage: there is nothing to compare against.

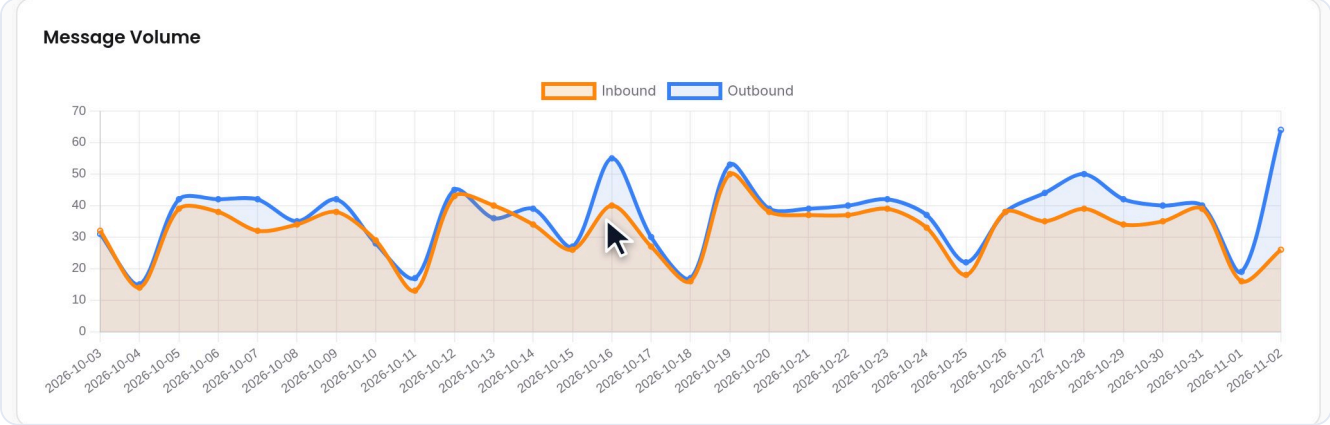
> **TIP**
> A red pill is not always bad news. If conversations go up because of a campaign, it makes sense that resolution goes up a little too. Read the cards together.

08

CHAPTER 8

Message volume

The messages of each day: the ones customers send and the ones your team answers.



Message Volume: inbound (orange) and outbound (blue), day by day.

Element	What it shows
Inbound (orange)	The messages customers sent you that day.
Outbound (blue)	The messages your team (and your automations) sent that day.
Horizontal axis	The days of the period.
Vertical axis	The number of messages.

Hover over the chart to see the exact number for each day. Click **Inbound** or **Outbound** in the legend to hide or show that series again.

What to look for

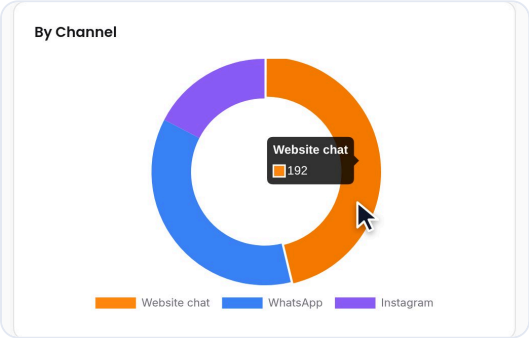
- **Weekly patterns.** At Mueblería Roble, there are hardly any messages on Sundays and Fridays are the busiest day.
- **Peaks.** A jump on a specific day usually has a cause: a promotion, an ad, a delivery problem.
- **The gap between the two lines.** If inbound goes up and outbound does not, the team is not keeping up.
- **Today**, on the right, with the real chat activity of the day.

CHAPTER 9

09 By channel and by status

Where conversations come from and where they stand today.

By channel



By Channel: where conversations come from.

The donut splits the conversations of the period by the **channel** they came through. Hover over a slice to see the number of conversations.

At Mueblería Roble, almost half come through the **website chat**, about as many through **WhatsApp** and the rest through **Instagram**.

Click a channel in the legend to hide it and compare the others.

TIP

Use it to decide where to put effort: if almost everything arrives through WhatsApp, that is where you want templates, quick replies and your fastest people.

By status



By Status: where the conversations of the period stand today.

The bars show **where the conversations that started in the period stand today**: **Open**, **Pending**, **Snoozed**, **Resolved** and **Closed**.

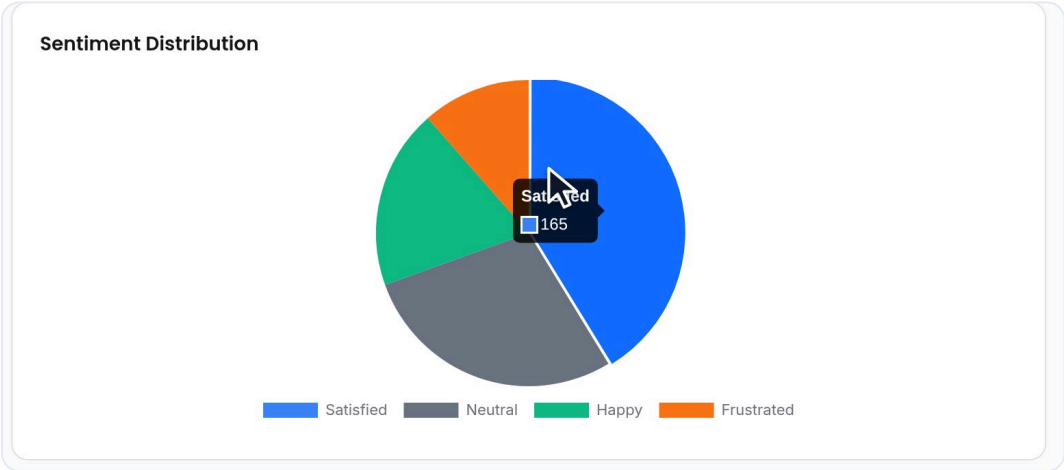
- In a past period, almost everything should be closed or resolved.
- If **open** ones grow from one week to the next, the team is falling behind.
- Many old **pending** ones are usually customers who did not reply: check your automatic close for inactivity.

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CHAPTER 10

Customer sentiment

How your customers felt in their conversations.



Sentiment Distribution, with the detail of a slice on hover.

The **Sentiment Distribution** splits conversations by how the customer felt: **Satisfied**, **Happy**, **Neutral** or **Frustrated**. Omnifox detects it in the conversations with your plan's artificial intelligence; the customer does not have to answer anything.

Sentiment	How to read it
Satisfied	The customer got what they were looking for.
Happy	They also said so enthusiastically.
Neutral	A question with no emotional charge (a price, opening hours).
Frustrated	Annoyance, complaints, delays. This is the slice to watch.

Hover over a slice to see how many conversations it has.

> **TIP**
> If the frustrated slice grows, look at the Top Tags of the same period (chapter 11): there is usually a specific problem behind it, such as late deliveries or a product out of stock.

> **NOTE**
> Sentiment is set by the AI reading the conversation; satisfaction (CSAT) is set by the customer answering the survey. They complement each other: sentiment covers every conversation; CSAT, only those who answered.

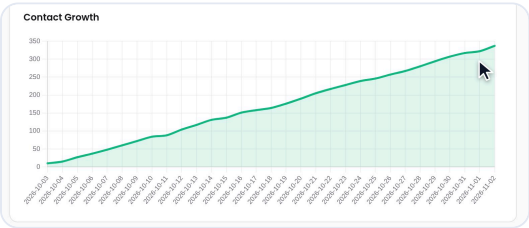
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CHAPTER 11

Contact growth and tags

How fast your customer base grows and what people talk to you about.

Contact Growth

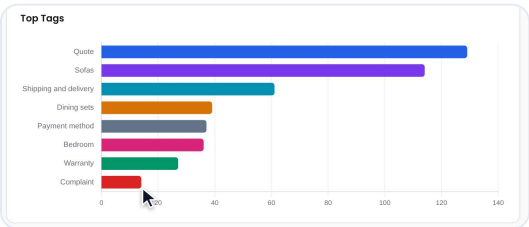


Contact Growth: the running total of new people.

The line **adds up**, day by day, the new people who wrote to you for the first time in the period. The last point matches the **New Contacts** card.

The **slope** tells you how fast your base is growing: a line that gets steeper means more new customers are arriving (because of a campaign, for example); a flat line means you are mostly hearing from customers you already had.

Top Tags



Top Tags: what people talk to you about.

The most used tags in the conversations of the period, from most to least. At Mueblería Roble: **Quote**, **Sofas**, **Shipping and delivery**, **Bedroom**, **Dining sets**, **Payment method**, **Warranty** and **Complaint**.

Here you see what people talk to you about and how many complaints there were.

TIP

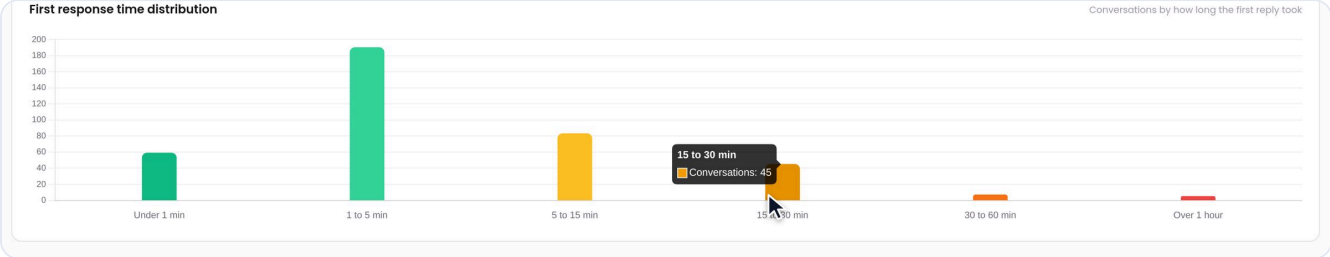
This chart is only as good as your tagging. Agree on a short set of tags with your team and always use it; you can also have them applied automatically with workflows or AI agents.

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CHAPTER 12

First response distribution

The real shape of your response times, beyond the average.



First response time distribution, from «Under 1 min» to «Over 1 hour».

This chart splits conversations by how long the **first response** from a person on your team took:

Bucket	What it means
Under 1 min	Practically immediate response.
1 to 5 min	Very good chat service.
5 to 15 min	Acceptable at peak hours.
15 to 30 min	The customer has started to wait.
30 to 60 min	Risk of the customer going to another store.
Over 1 hour	Usually messages that arrived outside business hours.

Hover over a bar to see how many conversations that bucket has.

Why look at the distribution

The average can be misleading: a few night-time conversations that wait for hours push it up a lot, even if during the day you answer in a couple of minutes. Here you see the real shape: at Mueblería Roble, most are answered in under five minutes, and the tail on the right is the conversations you need to look at.

TIP

If the «Over 1 hour» tail is big and they are night messages, you do not need more people during the day: you need an after-hours reply (a workflow or an AI agent that says when you will be back).

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CHAPTER 13

Messages by day and hour

When people write to you, hour by hour, to build your shifts.



Messages by Day & Hour: the more intense the color, the more messages.

The heat map crosses the **days of the week** (rows, Monday to Sunday) with the **hours of the day** (columns, 00 to 23). Each cell shows how many messages there were on that day and hour during the period: the more intense the color, the more messages. Hover over a cell to see the number.

The hours are in the **workspace time zone** (chapter 5), your business's local time.

How to use it

- **Build your shifts around the peaks.** At Mueblería Roble, the peaks are from 10:00 to 12:00 and from 16:00 to 19:00, and Saturday is concentrated in the morning. That is when more people need to be online.
- **Review your business hours.** If there is a lot of activity at a time when nobody is working, you may want to open earlier or close later.
- **Schedule campaigns** at the hours when your customers are already writing.

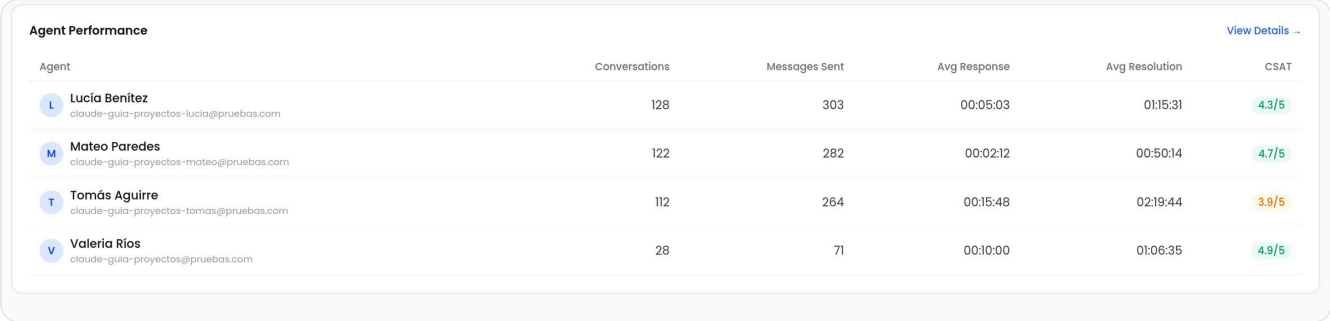
> **TIP**
> Choose a long period (Last 30 days or Last month) so the map reflects your typical week and not a special day.

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CHAPTER 14

Agent performance

The team table, at the bottom of the overview.



Agent Performance, at the bottom of the overview, with the View Details link.

Column	What it measures
Agent	The person’s name and email.
Conversations	The conversations of the period assigned to them.
Messages Sent	The messages that person sent.
Avg Response	Their average first response time (hours:minutes:seconds).
Avg Resolution	Their average time to resolve.
CSAT	The average survey rating of their conversations, out of 5.

Who a conversation counts for

A conversation counts for the **agent it was assigned to**, also after it is closed, even if the workspace releases the assignment on close. That way, each person's work does not disappear from the reports when the conversation ends.

With **View Details**, at the top right of the table, you go to the agent report (chapter 15).

> **TIP**
> Compare each person against the team average and against themselves over time, not only against the best. Whoever handles the hardest cases usually has longer resolution times.

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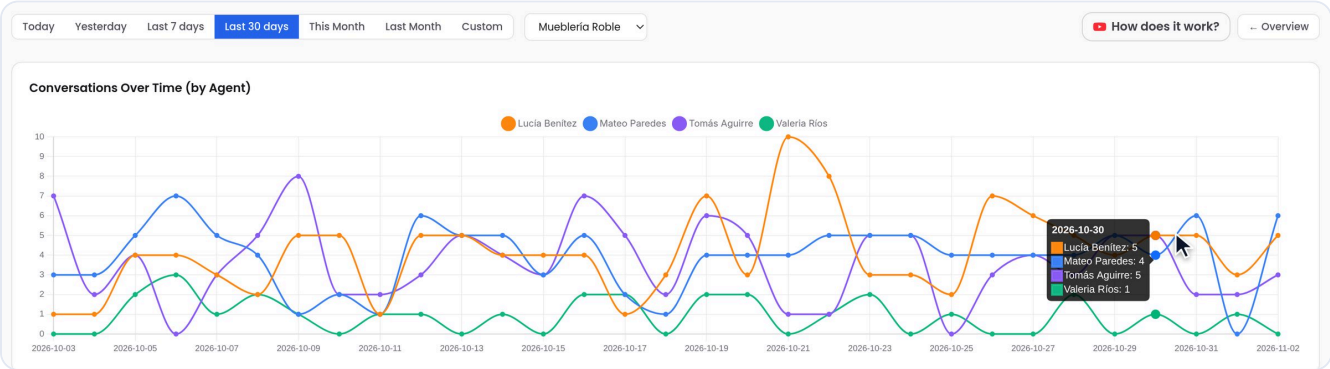
CHAPTER 15

The agent report

The detail of each person on the team, with their charts.

Open it with **Agent Reports**, at the top right of the overview, or with **View Details** in the team table. It has the same date and workspace filters, and the **Overview** button to go back.

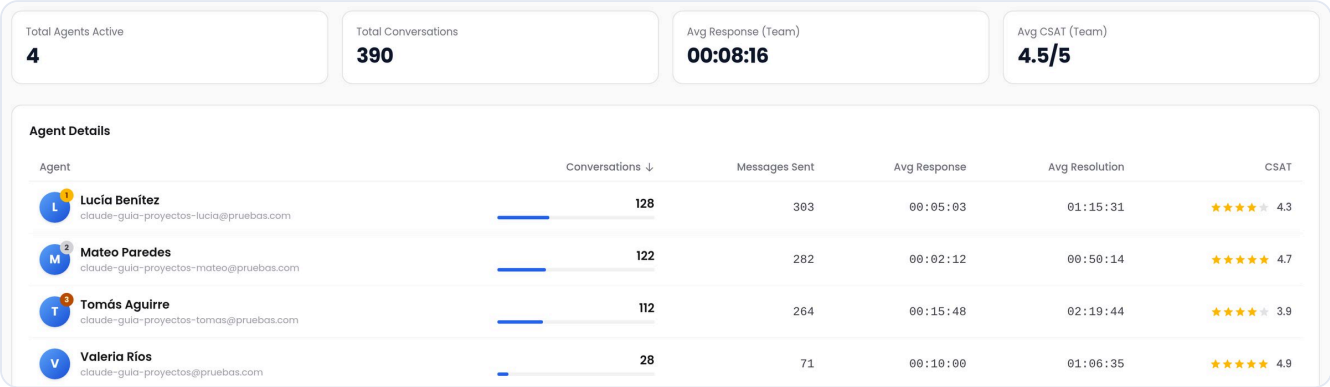
Conversations Over Time



Agent report: each agent's conversations, day by day.

One line per agent with their conversations day by day. Hover over a day to see each person's; click a name in the legend to hide or show their line. This is where you compare the team's **workload**: if one person always gets more than the others, check how conversations are distributed.

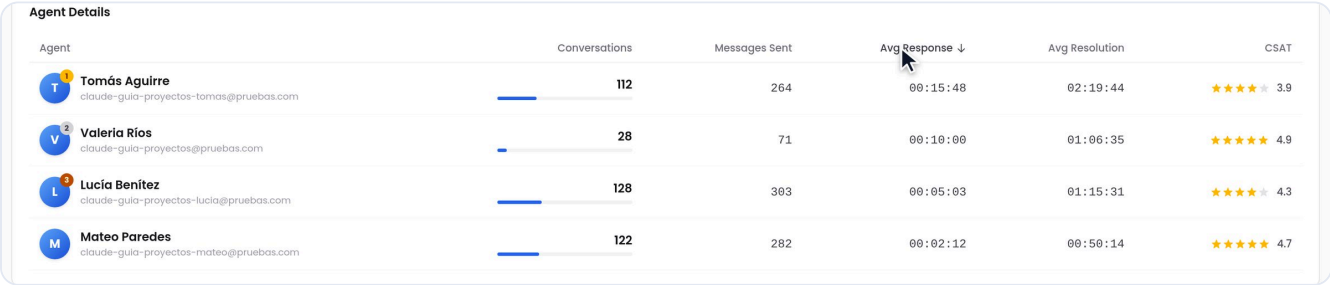
Team summary and Agent Details



The team summary and the Agent Details table.

Card	What it measures
Total Agents Active	The people who handled conversations in the period.
Total Conversations	The conversations handled by the team.
Avg Response (Team)	The team's first response time.
Avg CSAT (Team)	The team's average satisfaction, out of 5.

The **Agent Details** table has the same columns as the one in the overview, with a bar comparing each person's conversations and the stars of their CSAT. Click a column header to **sort** by it; a second click reverses the order. The arrow next to the header shows the column and the direction.



The table sorted by Avg Response, from highest to lowest: Tomás comes first.

The two charts at the bottom



Response Time by Agent (in minutes) and CSAT by Agent.

Chart	What it shows
Response Time by Agent	Two bars per person, in minutes: **Avg Response (min)** (orange) and **Avg Resolution (min)** (blue).
CSAT by Agent	Each person's average satisfaction, from 0 to 5.

Here it is obvious that Tomás replies and resolves more slowly than the rest: something to talk about with him, with the data in hand (chapter 30).

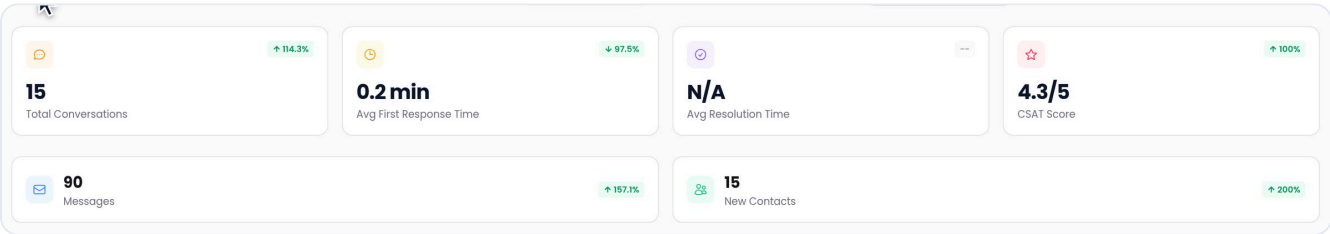
16

CHAPTER 16

Metrics glossary

What each number means exactly.

Metric	Definition
Conversation	Each thread with a customer. Counted by the date it started.
First response	The time from when the customer writes until the first reply from a person on your team.
Resolution	The time from the start of the conversation until it is marked as resolved.
CSAT (satisfaction)	The average of the survey ratings, from 1 to 5.
NPS	In the survey results: the percentage of promoters (4 and 5) minus the percentage of detractors (1 and 2), on the 1 to 5 scale (chapter 18).
Response Rate	What percentage of the surveys sent got an answer.
Inbound / outbound messages	The ones customers send / the ones your team sends.
New Contacts	People who appear for the first time in the period.
Sentiment	How the customer felt in the conversation, detected by the AI.
Trend	The percentage change against the previous period of the same length.
SLA	The response or resolution time committed in the workspace SLA policies.
N/A	Not available: there is no data in that period to calculate that metric.



With the Today filter, a metric without enough data shows N/A.

NOTE

If CSAT shows N/A, most likely the survey is turned off or nobody answered it in the period. Check the CSAT Settings (chapter 17).

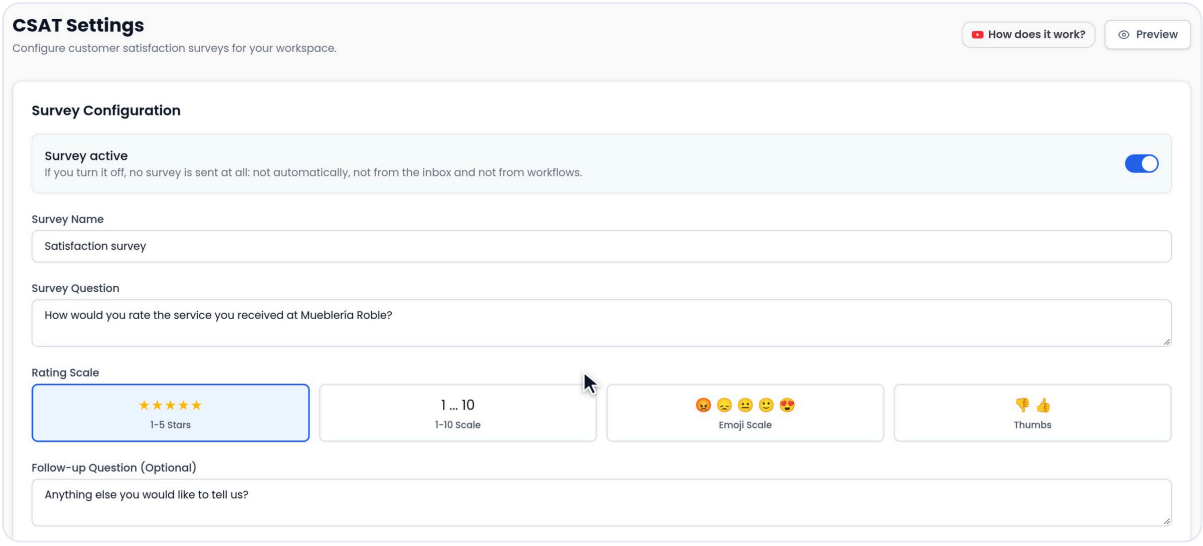
17

CHAPTER 17

Satisfaction survey: setting it up

You ask customers how they were served, automatically, when the conversation ends.

The satisfaction survey (CSAT) is set up in the workspace settings, under **Satisfaction survey**. The page is called **CSAT Settings**.



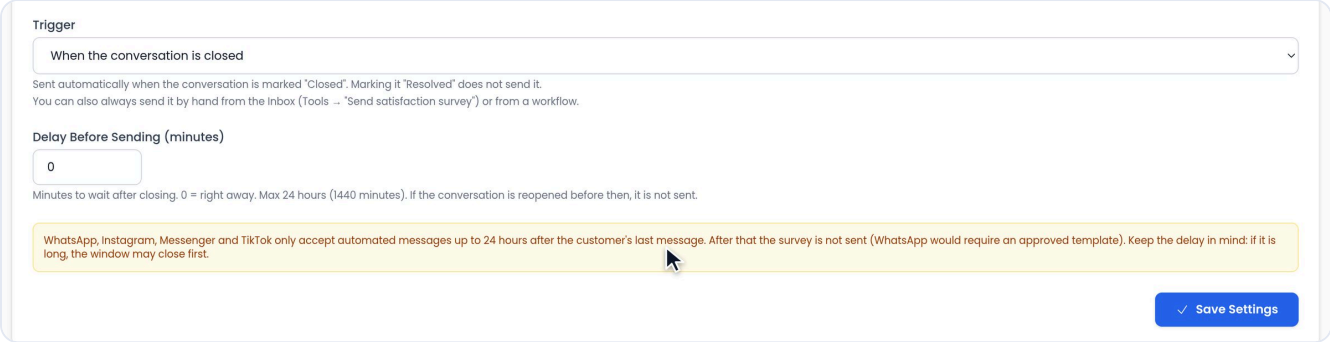
CSAT Settings: Survey active, name, question, scale and follow-up question.

Field	What it is
Survey active	The main switch. If you turn it off, no survey is sent: not automatically, not from the inbox, not from workflows.
Survey Name	An internal name, for example «Satisfaction survey».
Survey Question	What the customer will see. In the example: «How would you rate the service you received at Mueblería Roble?».
Rating Scale	How the customer answers (table below).
Follow-up Question (Optional)	Invites the customer to leave a comment, for example «Anything else you would like to tell us?».

The scales

Scale	How the customer answers
1-5 Stars	Taps one to five stars. It is the one used by the CSAT Score and the 1 to 5 NPS.
1-10 Scale	Picks a number from 1 to 10.
Emoji Scale	Picks a face, from very angry to delighted.
Thumbs	Thumbs up or thumbs down.

When it is sent



Trigger, Delay Before Sending, the 24-hour window notice and Save Settings.

Field	What it is
Trigger	**When the conversation is closed**: sent automatically when the conversation becomes «Closed» (marking it as «Resolved» does not send it). **When resolved**: sent when it is marked as resolved. **Manual only**: never sent automatically.
Delay Before Sending (minutes)	Minutes to wait after closing. 0 = right away. Maximum 24 hours (1440 minutes). If the conversation is reopened before, it is not sent.

1. Open the workspace settings and go to **Satisfaction survey**.
2. Turn on **Survey active**.
3. Type the name, the question and, if you want, the follow-up question.
4. Choose the scale and the trigger, and adjust the delay.
5. Click **Save Settings**. With **Preview**, at the top right, you see how the customer will receive it.

> **WATCH OUT**
> WhatsApp, Instagram, Messenger and TikTok only accept automatic messages up to 24 hours after the customer's last message. After that the survey is not sent (on WhatsApp it would need an approved template). Mind the delay: if it is long, the window may close first.

> **TIP**
> A short delay (0 to 10 minutes) gives the best response rate: the customer still has the conversation in mind.

18

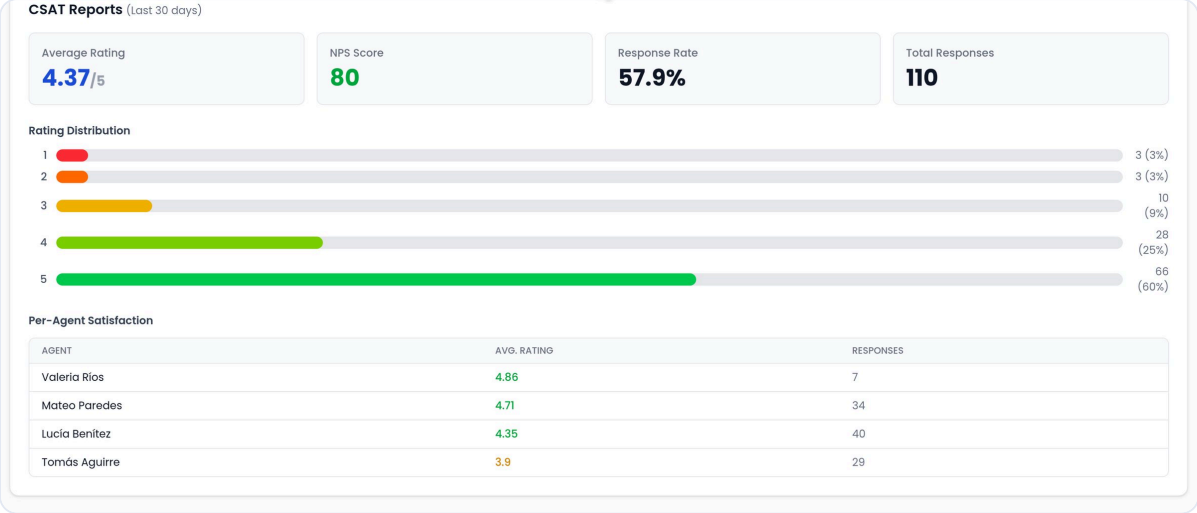
CHAPTER 18

Satisfaction survey: sending it and seeing the results

From the closed conversation to the star in the report, live.

The results

Below the settings are the **CSAT reports (last 30 days)**:



CSAT reports (last 30 days): the four figures, the distribution and per-agent satisfaction.

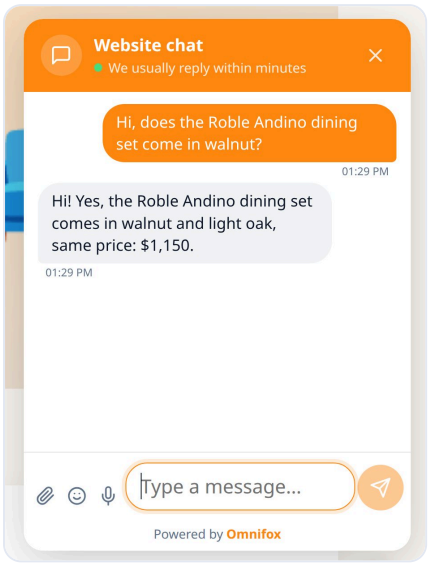
Element	What it shows
Average Rating	The average of the responses, out of 5.
NPS Score	Promoters minus detractors: on the 1 to 5 scale, the percentage of 4 and 5 answers minus the percentage of 1 and 2 answers. It goes from −100 to 100.
Response Rate	What percentage of the surveys sent was answered.
Total Responses	How many responses arrived in the 30 days.
Rating Distribution	One bar per score, with the number and percentage of responses.
Per-Agent Satisfaction	For each agent, their average rating and how many responses they have.

How the NPS is calculated, with round numbers: out of 100 responses, 65 are 5 and 29 are 4 (94 promoters), and 1 is 1 and 3 are 2 (4 detractors). (94 − 4) ÷ 100 = 90% → **NPS 90**.

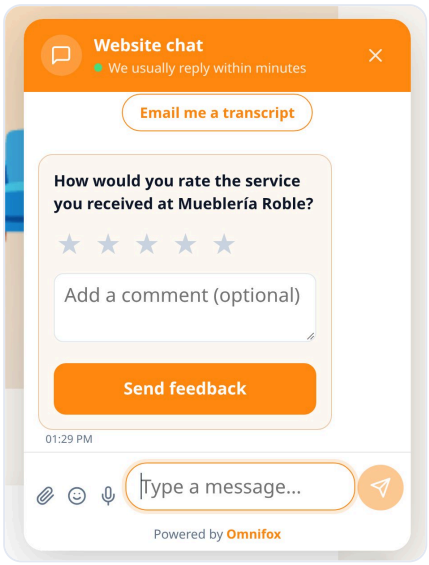
Live: a customer writes through the website chat

1. A customer asks through the Mueblería Roble website chat whether the Roble Andino dining set comes in walnut.
2. Mateo replies from the inbox and, since the problem is solved, **closes** the conversation.

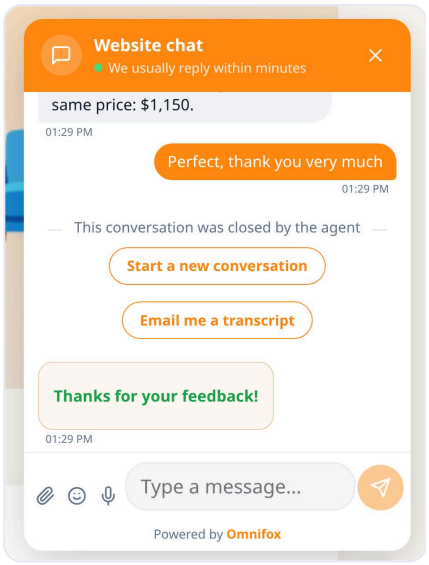
3. When it is closed, Omnifox sends the survey automatically through the same chat (the trigger is «When the conversation is closed» and the delay, 0).
4. The customer sees the stars, taps five, leaves a comment if she wants and submits the rating.
5. At that moment the response already counts in the reports, under Mateo's name.



The customer asks through the website chat and Mateo replies.



When the conversation is closed, the survey arrives: stars, comment and submit.



The response sent: the thank-you message.

Sending it manually

- **From the inbox:** in any conversation, open **Tools** and choose **«Send satisfaction survey»**.
- **From a workflow:** with the step that sends the survey, for example only to customers who bought.

> **NOTE**
> With the «Manual only» trigger the survey is never sent automatically: use it if you prefer to decide who gets it. Remember that with Survey active turned off it is not sent even manually.

> **TIP**
> The response is credited to the agent the conversation was assigned to, and it counts both in the CSAT Score card of the overview and in the CSAT column of the team table.

CHAPTER 19

19 Agent quality: the rubric

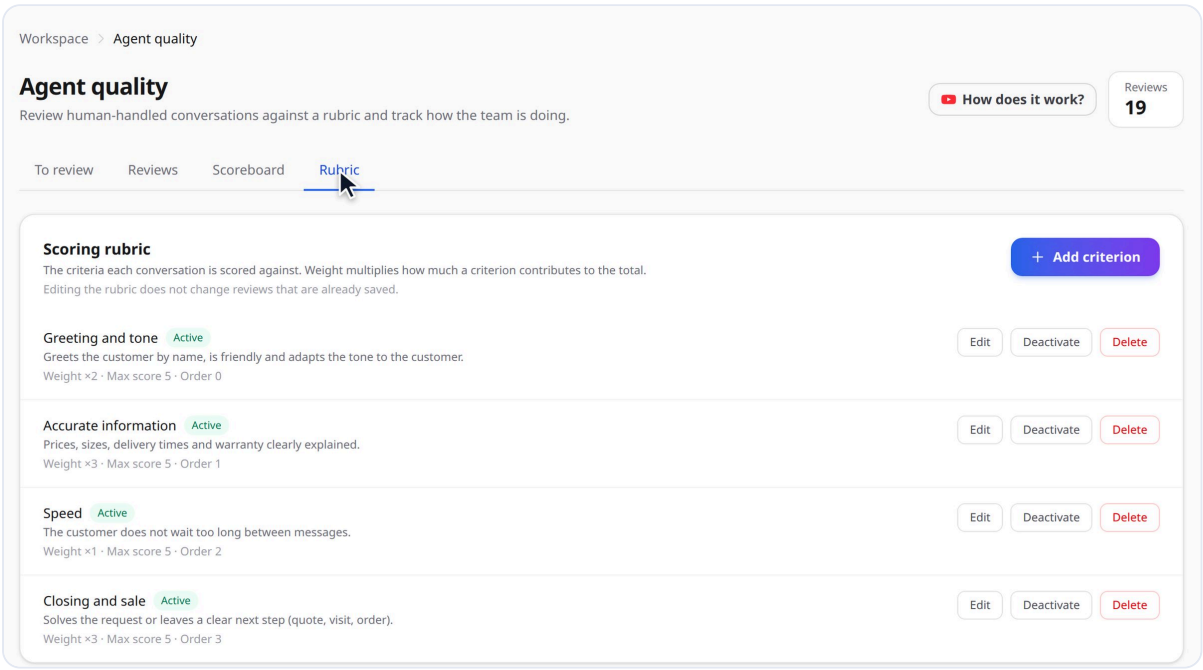
Satisfaction comes from the customer; quality, from your supervisor.

Agent quality is for reviewing conversations handled by people against a fixed standard and following the team's performance. It is in the workspace settings and has four tabs:

Tab	What for
To review	The conversations nobody has reviewed yet (chapter 20).
Reviews	The review history (chapter 21).
Scoreboard	Each agent's average and their strong and weak criteria (chapter 21).
Rubric	The criteria used for scoring.

At the top right, the **Reviews** counter tells you how many are saved.

The rubric



Agent quality → Rubric: the four Muebleria Roble criteria, with their weight and maximum score.

The **Scoring rubric** is the set of criteria used to score a conversation. Each criterion has:

Field	What it is
Name	For example, «Greeting and tone».
Description	What is expected, so every reviewer measures the same way.
Weight (×N)	Multiplies the criterion's contribution to the total. A ×3 criterion weighs three times as much as a ×1.
Max score	The highest score that can be given for that criterion.
Order	Where it appears in the review dialog.

The Muebleria Roble rubric:

Criterion	Description	Weight	Max
Greeting and tone	Greets the customer by name, is friendly and adapts the tone to the customer.	×2	5
Accurate information	Prices, sizes, delivery times and warranty clearly explained.	×3	5
Speed	The customer does not wait too long between messages.	×1	5
Closing and sale	Solves the request or leaves a clear next step (quote, visit, order).	×3	5

Add, edit, deactivate or delete

1. In the **Rubric** tab, click **+ Add criterion**.
2. Type the name and the description, and choose the weight, the maximum score and the order.
3. Save. The criterion appears in the list marked **Active**.

Each criterion has three buttons: **Edit** changes its data; **Deactivate** removes it from new reviews without deleting it; **Delete** deletes it.

> **NOTE**
> Changing the rubric does not modify the reviews you already saved: each review keeps the scores it was made with.

> **TIP**
> A few well-described criteria work better than a long list. Give more weight to what really matters in your business: in a store, accurate information and closing.

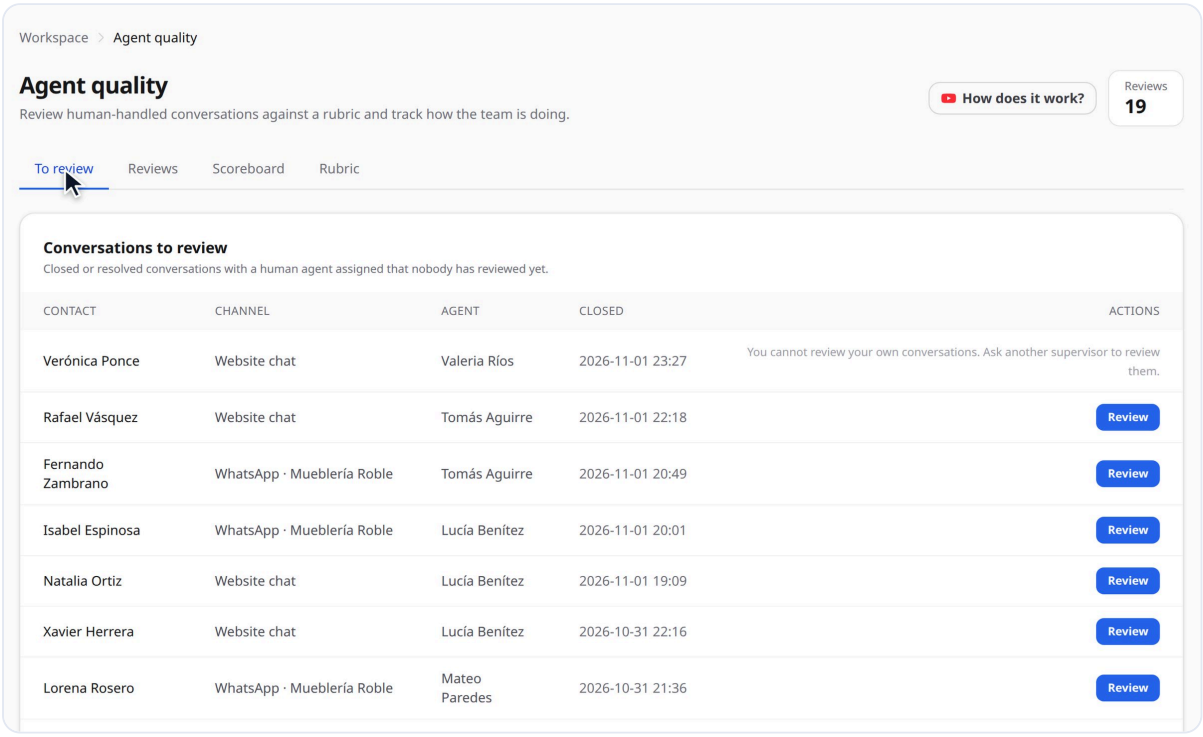
20

CHAPTER 20

Agent quality: reviewing a conversation

Read the conversation, give a score per criterion and leave a useful comment.

To review



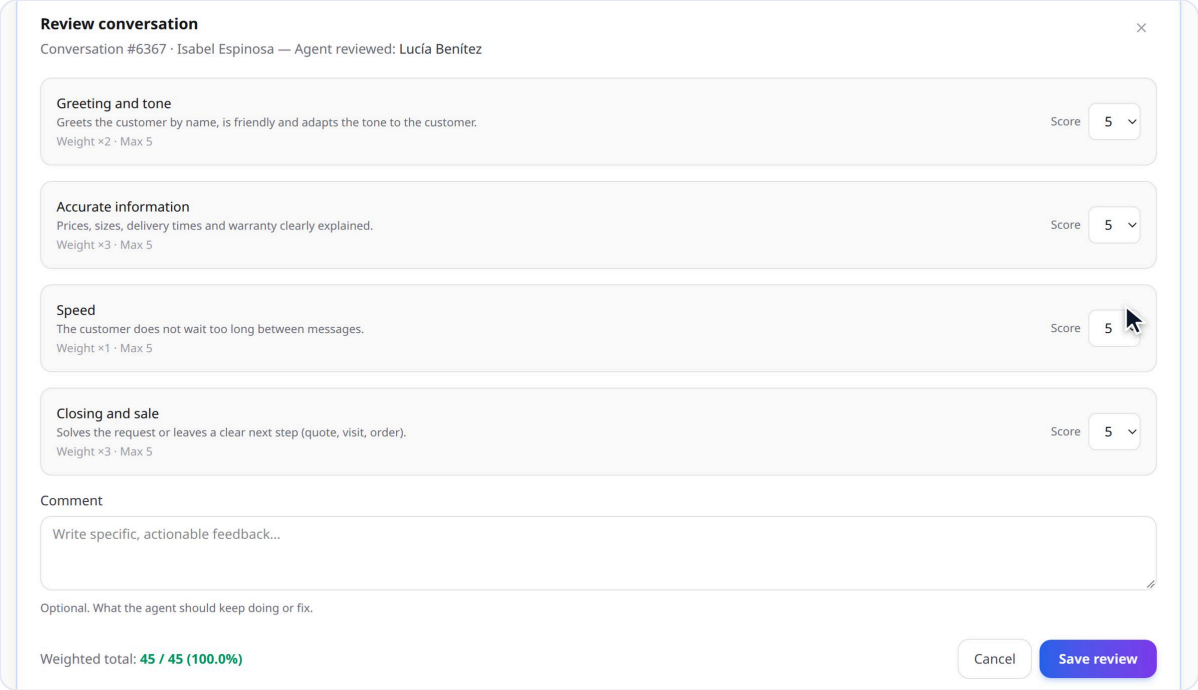
To review: closed or resolved conversations handled by a person, not reviewed yet.

To review lists the **closed or resolved** conversations, with a **human agent assigned**, that nobody has reviewed yet. The columns are **Contact**, **Channel**, **Agent**, closing date and time, and the **Review** button.

> **WATCH OUT**
> Nobody can review their own conversations: if you handled one, it does not show up for you to review.

The review dialog

1. Click **Review** on the conversation you want to check.
2. Read the whole conversation, on the left.
3. For each rubric criterion, pick a value in **Score**.
4. Write a **Comment** for the agent: what they should repeat or correct.
5. Check the **Weighted total** and click **Save review**.



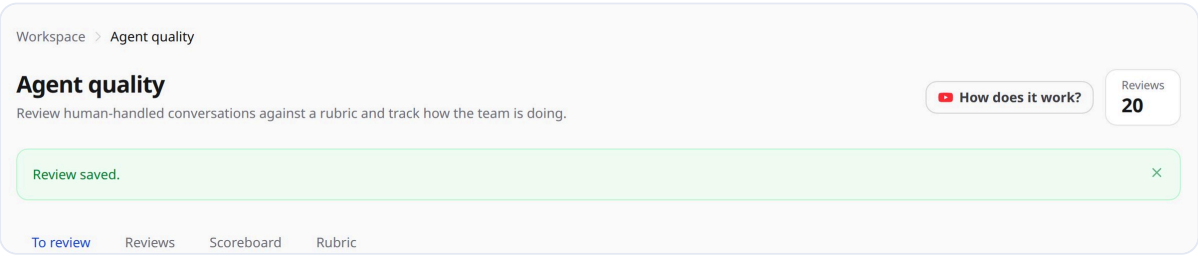
Reviewing a conversation: one score per criterion, the comment and the weighted total.

How the total is calculated

Each score is multiplied by the weight of its criterion, they are added up and divided by the maximum possible. With the Mueblería Roble rubric, the maximum is 5×2 + 5×3 + 5×1 + 5×3 = **45**. An example:

Criterion	Score	Weight	Contribution
Greeting and tone	5	×2	10
Accurate information	3	×3	9
Speed	4	×1	4
Closing and sale	4	×3	12
Weighted total			**35 / 45 (77.8%)**

When you save, a confirmation appears, the counter goes up and the conversation leaves the to-review list.



The review saved: the counter goes up and the conversation leaves To review.

TIP

A good comment is specific and actionable: «You should have offered the written quote at the end» helps more than «Good, but could be better».

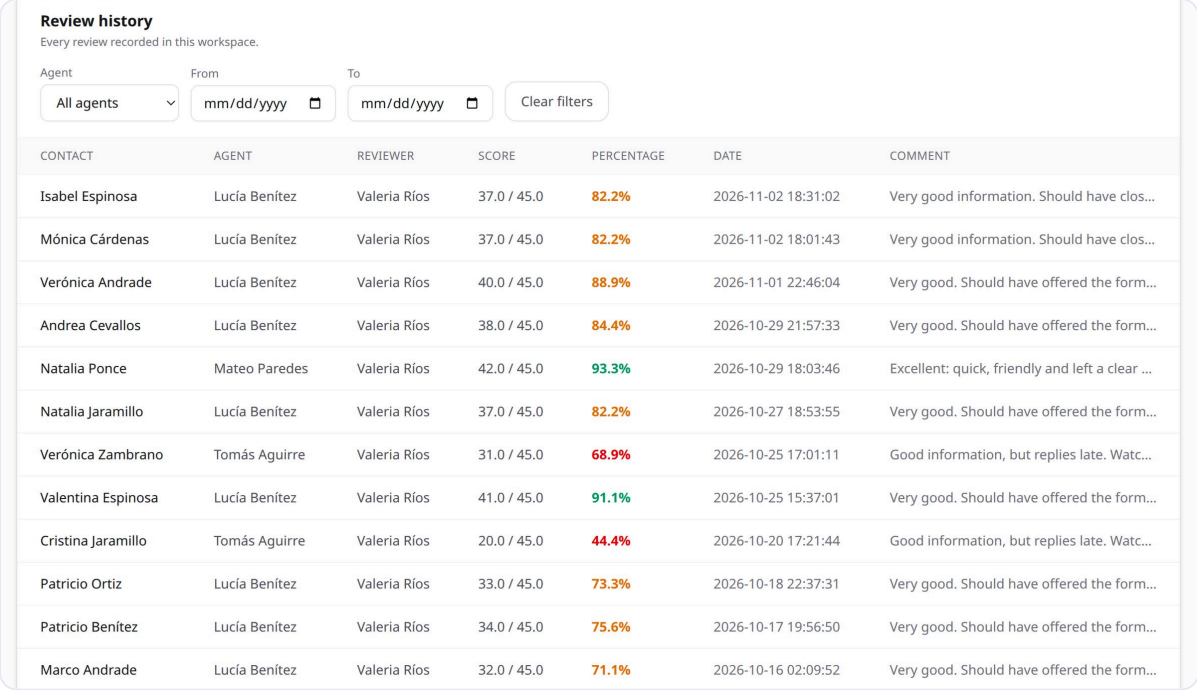
21

CHAPTER 21

Agent quality: reviews and scoreboard

The review history and the team scoreboard.

Reviews



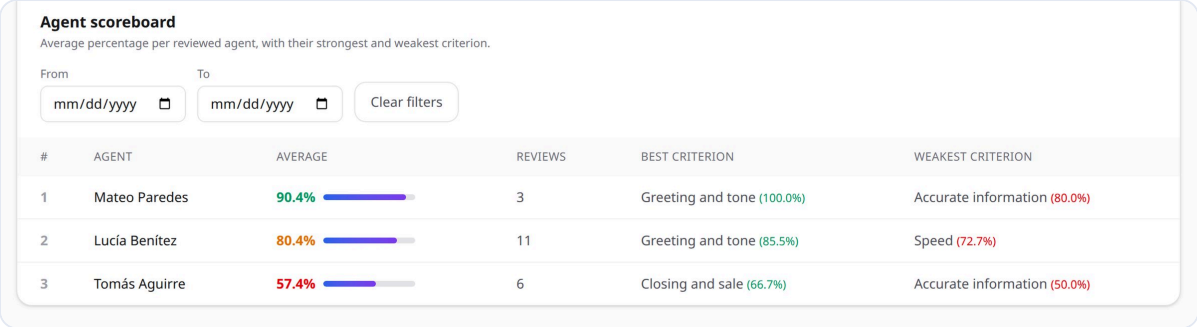
Reviews: the history, with filters by agent and by date.

The **Review history** gathers every review in the workspace:

Column	What it is
Contact	The customer of the reviewed conversation.
Agent	Who handled it.
Reviewer	Who reviewed it.
Score	The weighted total, for example 36.0 / 45.0.
Percentage	The same total as a percentage, in green, amber or red.
Date	When the review was saved.
Comment	The feedback for the agent.

At the top are the **Agent** filter (or **All agents**), **From** and **To**, and the **Clear filters** button.

Scoreboard



Scoreboard: each agent's average, their best criterion and their weakest.

The **Agent scoreboard** ranks people by their **average** percentage and shows, for each one:

Column	What it is
Average	The average percentage of their reviews, with a bar.
Reviews	How many reviews they have.
Best criterion	The criterion they do best in, with its percentage.
Weakest criterion	The criterion they struggle with most.

It can also be filtered with **From** and **To**. It is the basis for concrete feedback: Tomás, for example, struggles with **Accurate information**.

> **TIP**
> An average based on few reviews says little. Before drawing conclusions, review several conversations of each person, from different channels and days.

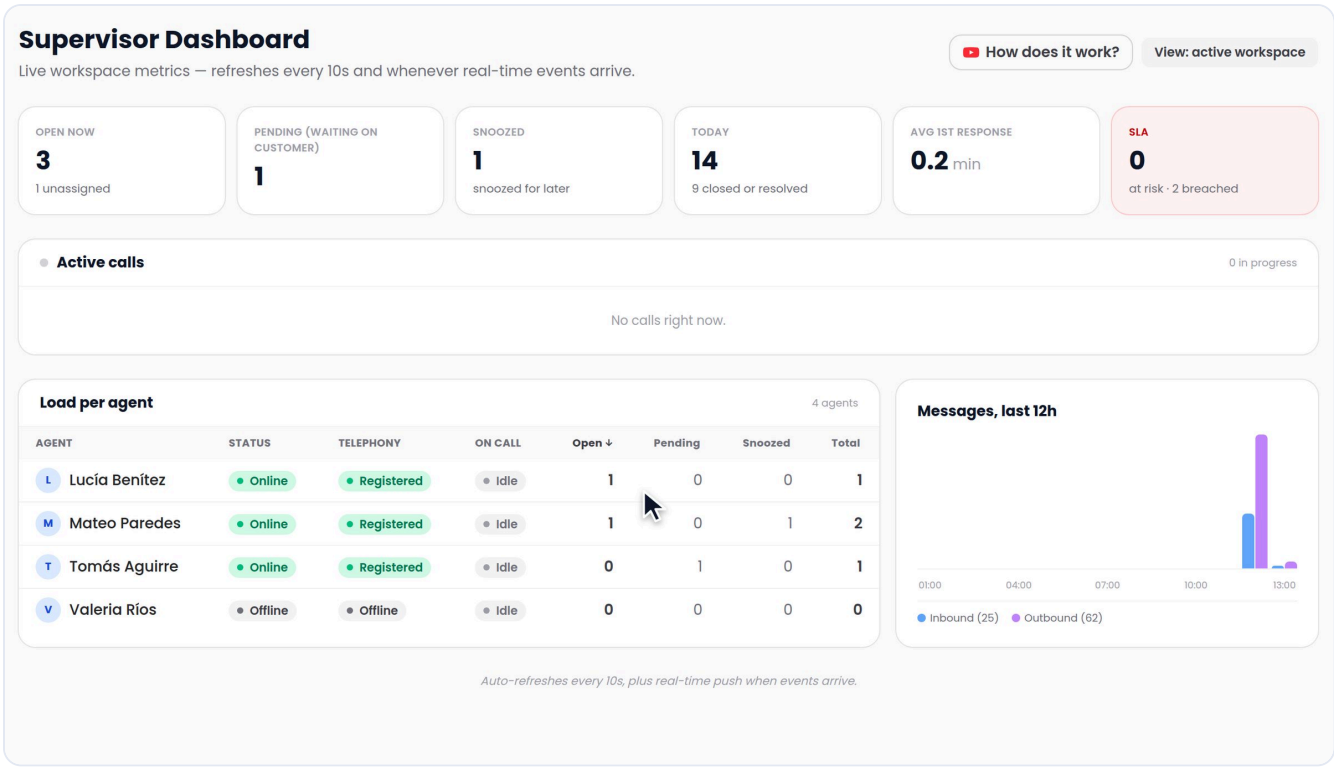
22

CHAPTER 22

Live supervisor: the cards

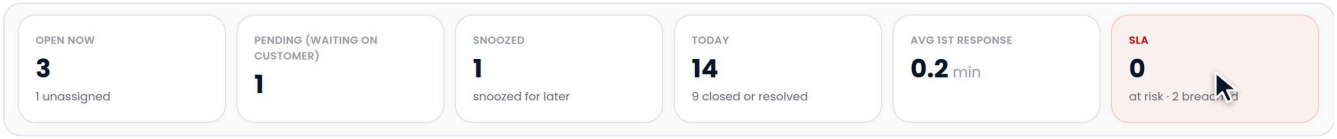
What is happening right now, without reloading the page.

The **Live supervisor** (**Analytics → Live supervisor**, or the button of the same name in the overview) opens the **Supervisor Dashboard**: the live metrics of the active workspace. It refreshes **every 10 seconds** and **instantly** with every event (a new message, an assignment, a close).



Analytics → Live supervisor: the Supervisor Dashboard.

The cards



The six cards of the panel, with the SLA card on the right.

Card	What it counts
Open now	The conversations open at this moment, and below how many are still **unassigned**.
Pending (waiting on customer)	The ones waiting for an answer from the customer.
Snoozed	The ones set aside to pick up later.
Today	The conversations that started today, and below how many are already **closed or resolved**.
Avg 1st response	Today's average first response.
SLA	**At risk**: conversations whose committed time runs out in the next half hour. **Breached**: the ones that already breached it today.

SLA times are defined in the workspace **SLA policies**. If you have no policies, the card stays at zero.

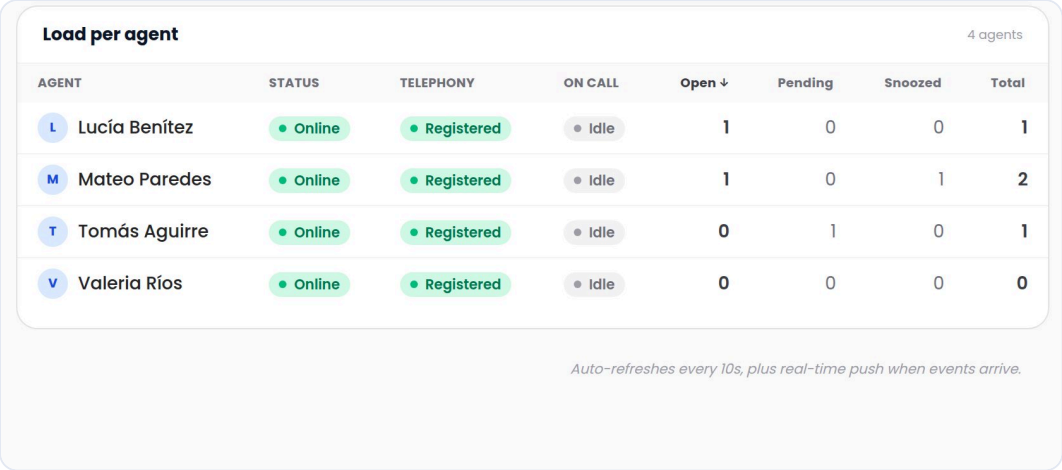
> **TIP**
> Look at two numbers first: «unassigned» and «at risk». An unassigned conversation is not being looked at by anyone; one at risk is about to break what you promised.

23

CHAPTER 23

Live supervisor: each agent's workload and status

Who is online, who is overloaded and who can take the next customer.



Load per agent: status, telephony, whether they are on a call and their conversations.

Column	What it shows
Agent	The person.
Status	**Online**, **Busy**, **Away** or **Offline**, based on the real presence of their open inbox.
Telephony	**Registered**, no channel or **Offline** (chapter 25).
On call	Whether they are on a call right now (**Idle** if not).
Open	Their conversations open now.
Pending	The ones waiting for the customer.
Snoozed	The ones they set aside for later.
Total	The sum: their current workload.

The **Status** comes from each person's open inbox, not from a box someone forgets to change: if they close the tab, they become Offline. Click a header to **sort** the table; for example, by **Total**, to see first who has the most work.

Filter by area

If the workspace has **teams**, a filter by area or team appears so you can see only sales or only support. Without teams, the table shows everyone.

Messages, last 12h



Messages, last 12h: inbound and outbound.

On the right, the **inbound** and **outbound** messages of the last twelve hours, hour by hour, with the total of each in the legend.

If inbound messages in the last hour shoot up and outbound do not, the team is falling behind.

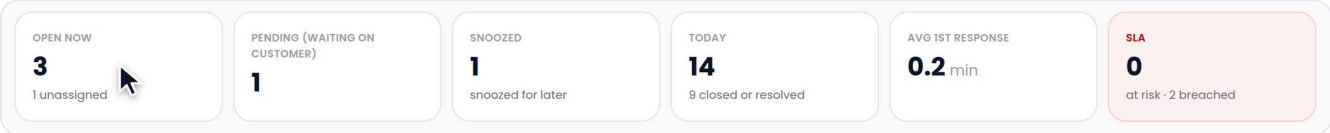
24

CHAPTER 24

Live supervisor: a customer arrives

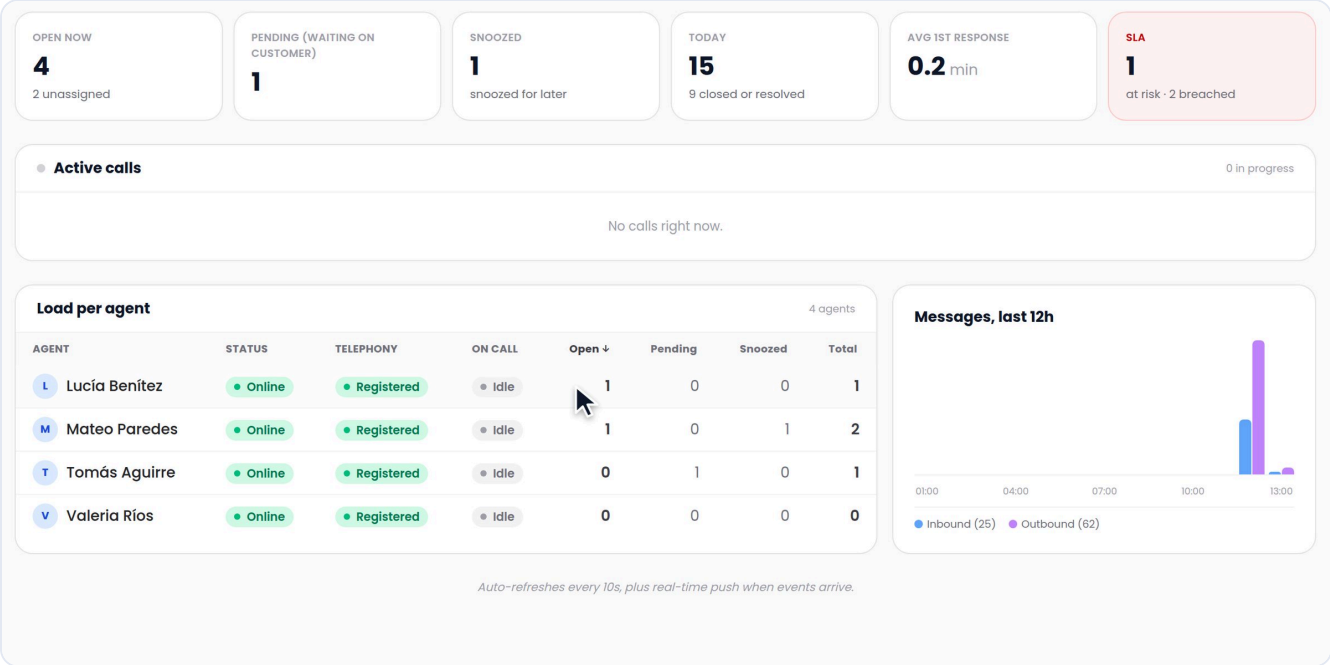
The panel in action while a new conversation comes in through the website chat.

Let's watch the panel while a customer arrives through the Mueblería Roble website chat.



Before: conversations open now and unassigned.

1. The customer writes through the website chat.
2. Without reloading anything, **Open now** goes up by one and one more **unassigned** appears; the **Today** card adds a conversation.
3. Lucía takes the conversation from the inbox.
4. Her row in **Load per agent** goes up: one more open in her total.



A customer arrives through the website chat: open and unassigned go up on their own; when Lucía takes it, her workload goes up.

This way the supervisor knows instantly who is overloaded and who should get the next customer.

> **TIP**
>
> Keep the panel open on a separate screen during peak hours (the ones in the chapter 13 heat map).

25

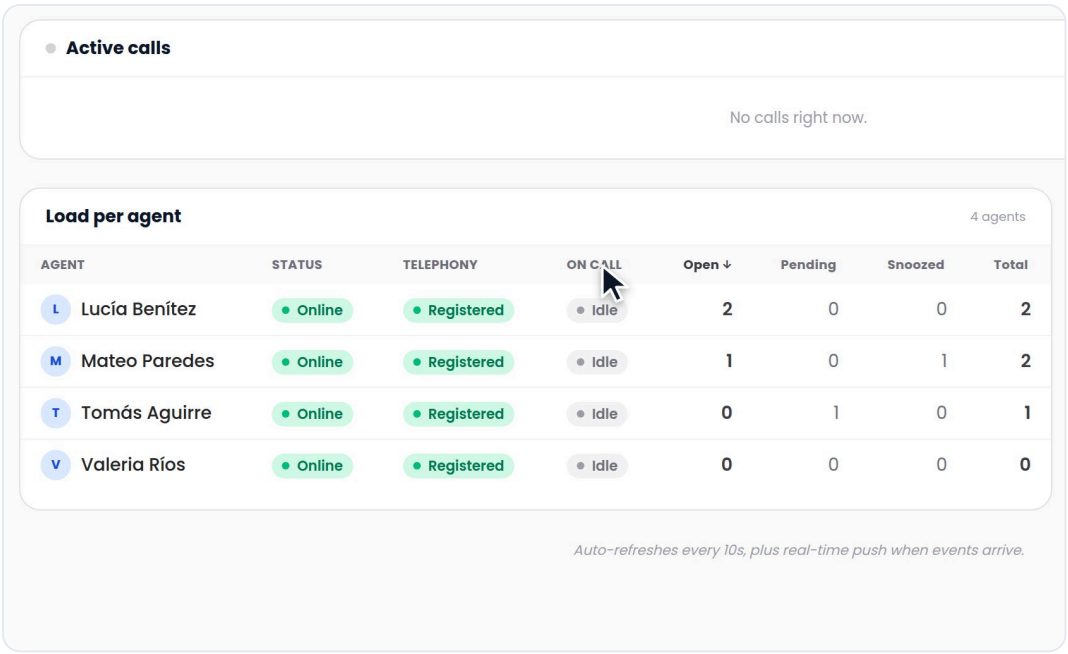
CHAPTER 25

Calls in the supervisor

If your workspace takes calls, the panel shows them too.

If your workspace handles calls, via WhatsApp or by phone, the panel adds:

- The **Active calls** list: the calls in progress at this moment, with the «in progress» counter.
- Two columns in each agent's row: **Telephony** and **On call**.



Active calls and the Telephony and On call columns.

Telephony	What it means
Registered	Their browser is registered with the phone system: they can receive calls.
No channel	They have no calls channel assigned.
Offline	They have a channel, but their browser is not registered right now (for example, they closed the inbox).

On call tells you whether they are on a call right now; if not, it shows **Idle**.

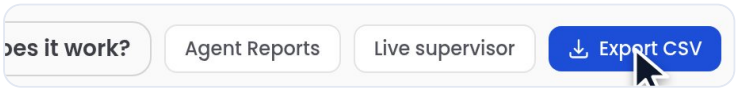
Mueblería Roble does not take calls, which is why the list says «No calls right now.». Calls have their own complete guide.

26

CHAPTER 26

Export to CSV

Take the numbers to Excel or Google Sheets.



The overview buttons: Agent Reports, Live supervisor and Export CSV.

In the overview, the **Export CSV** button downloads a file with what you are looking at:

- The **date range** of the filter.
- The **overview totals** (the cards).
- The **agent performance** table.

1. Choose the period and the workspace.
2. Click **Export CSV**.
3. The file `omnifox-report-YYYY-MM-DD.csv` is downloaded, with the date of the day in its name.
4. Open it with Excel, Google Sheets or any spreadsheet.

> **TIP**
> The CSV is ideal for the month-end close: choose Last month, export and save the file in a folder. That way you build your own history and month-over-month charts.

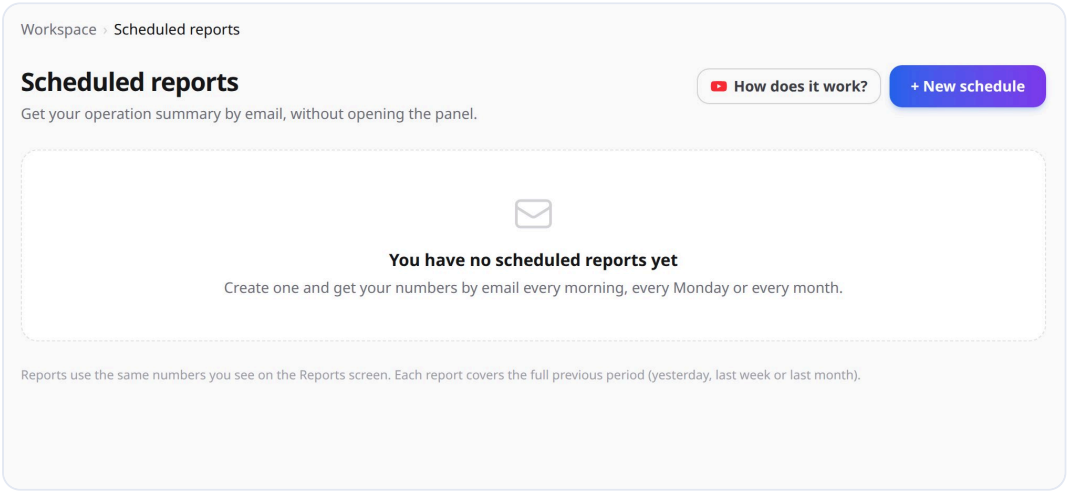
> **NOTE**
> If Excel shows everything in a single column, use Data → From Text/CSV and choose comma as the separator.

CHAPTER 27

27 Scheduled email reports

The overview arrives in your inbox, without opening the dashboard.

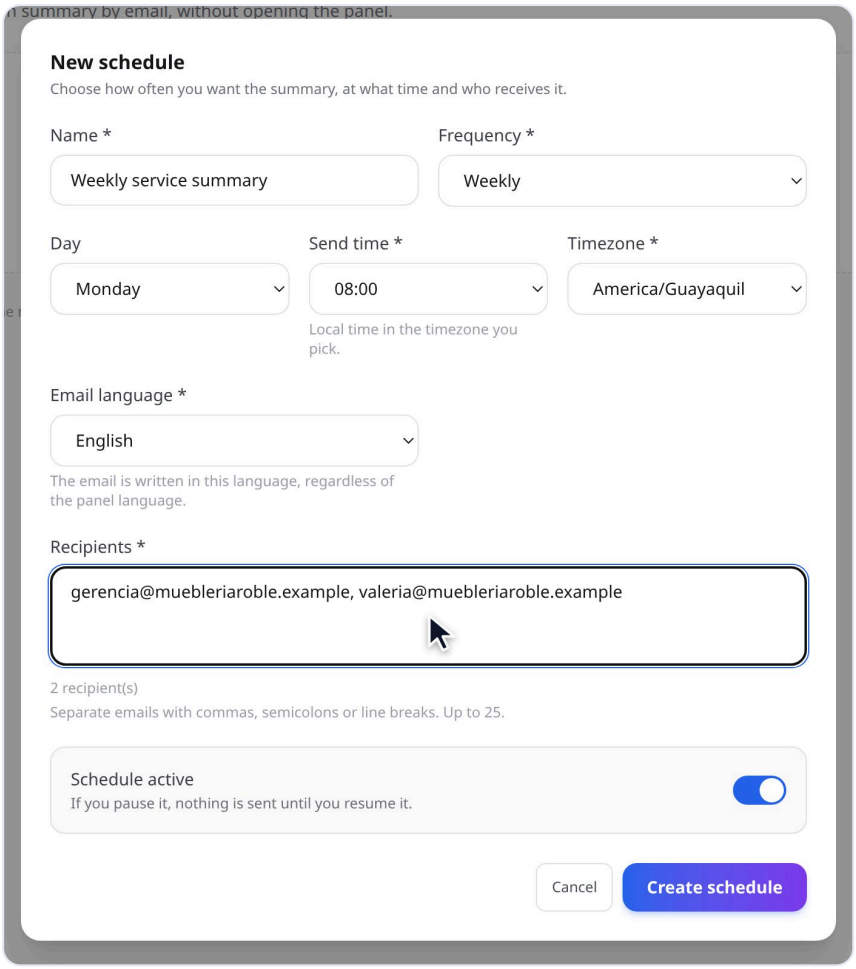
With **Scheduled reports** the overview arrives by email to whoever you choose: every morning, every Monday or every month. They are in **Analytics → Scheduled reports**.



Analytics → Scheduled reports, still empty, with the + New schedule button.

Create a schedule

1. Click **+ New schedule**.
2. Fill in the form (table below).
3. Leave **Schedule active** on so it starts sending, or turn it off to save it paused.
4. Click **Create schedule**. A confirmation message appears.



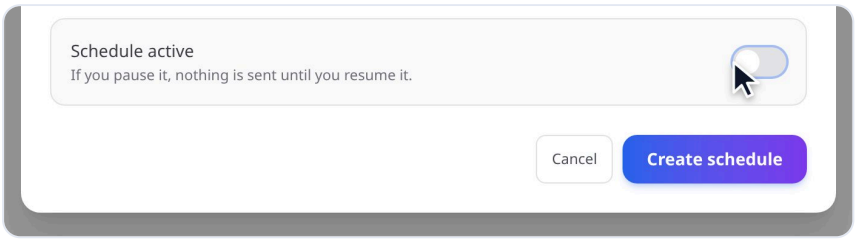
New schedule: name, frequency, day, time, time zone, language and recipients.

Field	What it is
Name	To recognize it in the list, for example «Weekly service summary».
Frequency	**Daily**, **Weekly** or **Monthly**.
Day	The day of the week (weekly) or of the month (monthly) it goes out.
Send time	The local time in the time zone you choose.
Time zone	For example, America/Guayaquil.
Email language	**Spanish**, **English** or **Portuguese**. The email is written in this language, regardless of the dashboard language.
Recipients	The email addresses, separated by commas, semicolons or line breaks. Maximum 25.
Schedule active	If you pause it, it stops sending until you turn it back on.

What period each email covers

Each email covers the **whole previous period**, with the same numbers you see on the Reports screen:

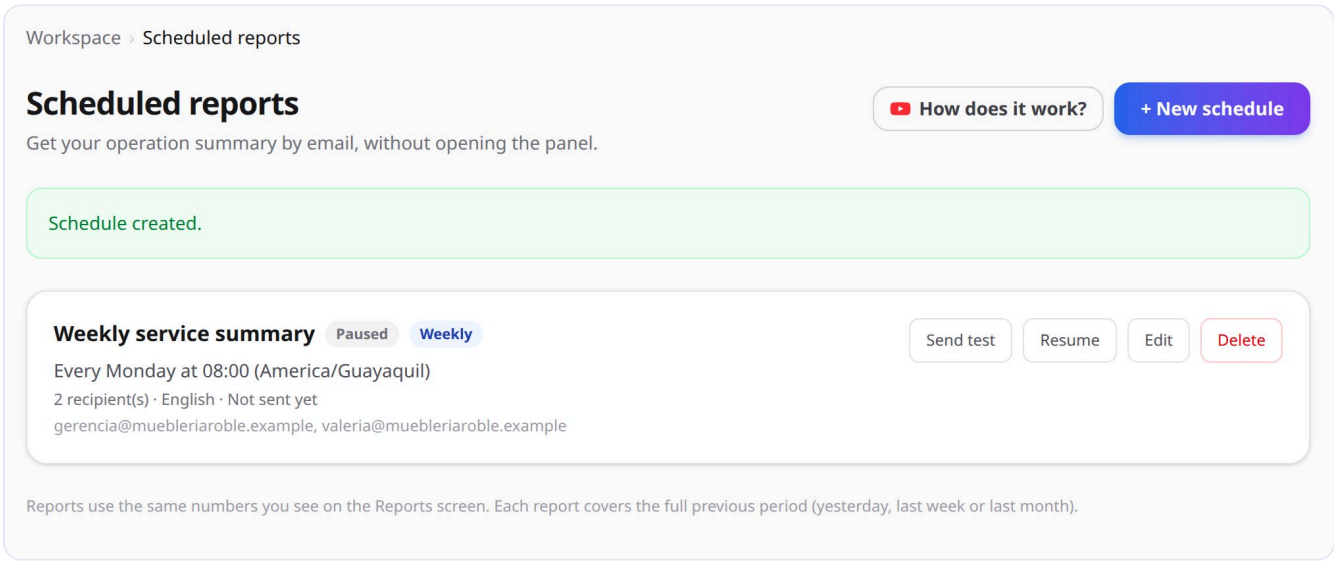
Frequency	Covers
Daily	All of yesterday.
Weekly	Last week.
Monthly	Last month.



Schedule active turned off: it is saved paused, without sending.

In the demo we leave it **paused**, because the sample addresses do not exist.

The list



The schedule in the list, with its actions: Send test, Resume, Edit and Delete.

Each schedule shows its name, its status (**Paused** or active), the frequency, a summary with the day, time, time zone, number of recipients and language, when it was last sent (**Not sent yet** if never) and the recipients. Its actions:

Action	What it does
Send test	Sends the email now, so you can see how it arrives.
Pause / **Resume**	Stops or restarts the sending.
Edit	Opens the form to change any field.
Delete	Deletes the schedule.

> **TIP**
> Before turning a schedule on, use Send test with your own email and check that it does not land in spam.

CHAPTER 28

28 Who can see the reports

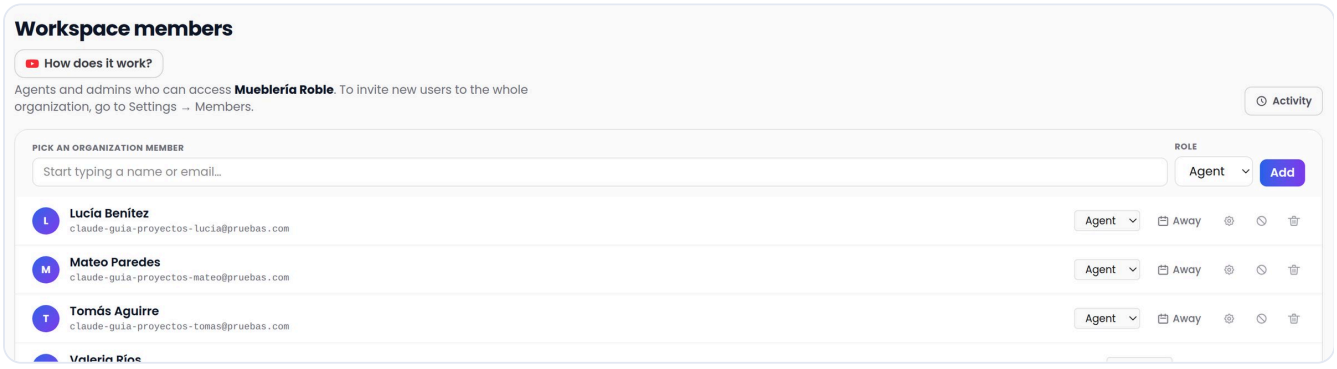
The business numbers, only for those who should see them.

Reports and the live supervisor are visible to the **owner**, the **admins** and the **supervisors**: the roles that have the **view reports** permission.

Role	Analytics	Live supervisor
Owner	Yes	Yes
Admin	Yes	Yes
Supervisor	Yes	Yes
Agent	No	No
Custom role	If it has «view reports»	If it has «view reports»

- An **agent** does not see Analytics in their menu.
- If an agent tries to open the reports address, Omnifox does not let them in.

Giving someone access



Settings → Workspace members: each person's role decides whether they see the reports.

1. Open the workspace **members** in the workspace settings.
2. Find the person and change their role to **Supervisor**, or assign them a custom role with the **view reports** permission.
3. From then on they will see **Analytics** in their menu.

> **NOTE**
> Each plan's sheet details which reports it includes. We cover that in the plans and billing guide.

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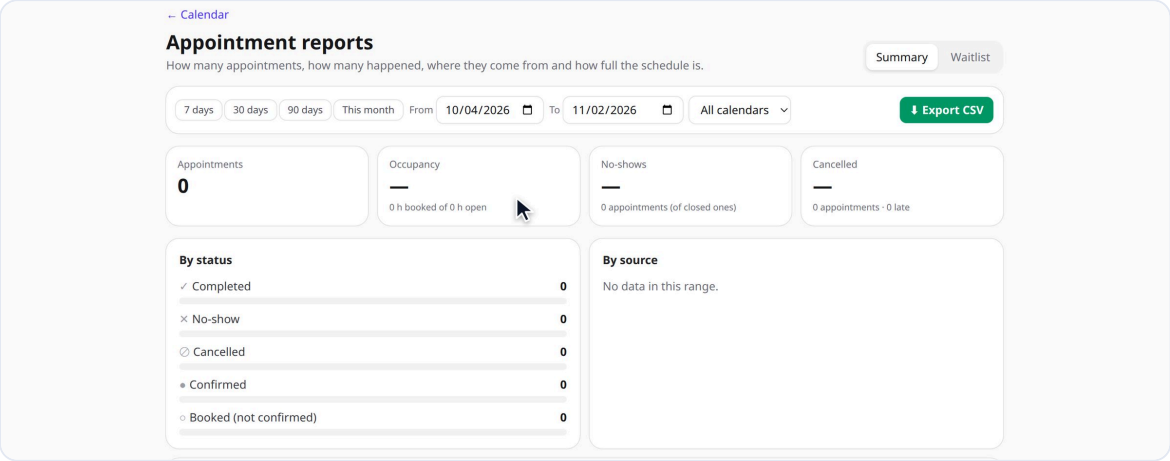
CHAPTER 29

Reports in other modules

Each module has its own numbers.

Besides the customer service overview, other Omnifox modules have their own reports:

Module	What it reports
CRM	The funnel and sales.
Calendar	Occupancy and no-shows.
Catalog	Best sellers and most asked items, and what people ask for that you do not have.
AI agents	Each artificial intelligence agent, with its analytics and quality.



An example of another module's report: the Calendar's Appointment reports.

The API

If you want to take the numbers to another system (your own dashboard, an ERP, a sheet that updates itself), the Omnifox **API** has the same reports. Each of these topics is explained in its own guide.

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CHAPTER 30

Use cases

Four everyday routines, and what to do when something does not add up.

1. On Mondays, the weekly overview



Monday morning: Last 7 days and the trends against the previous week.

1. Open **Analytics** → **Reports** and choose **Last 7 days**.
2. Go through the six cards and their pills: what went up? What went down?
3. Look at **By Status**: are there conversations from last week still open?
4. Check **Top Tags** and **Sentiment**: were there more complaints or more frustration?
5. If you want this to arrive on its own, create a weekly schedule for first thing on Monday (chapter 27).

2. Build shifts with the heat map

1. Choose **Last 30 days** or **Last month**.
2. In **Messages by Day & Hour**, mark the most intense time slots.
3. Put more people online in those slots and review your business hours.
4. A month later, compare the **First response time distribution**: the tail on the right should shrink.

3. The feedback conversation with each person

1. In the **Agent Reports**, look at their conversations, their times and their CSAT for the month.
2. In **Agent quality** → **Scoreboard**, look at their average, their best criterion and their weakest.
3. Open two or three reviews from their history with specific comments.
4. Agree on a single improvement point and look at it again the following month.

4. During the day, the supervisor open

1. Open the **Live supervisor** on a separate screen.
2. Watch **unassigned** and SLA **at risk**.
3. Sort **Load per agent** by Total and give the next customer to whoever has the least.

Troubleshooting

What you see	What to check
I do not see **Analytics** in the menu	Your role does not have the view reports permission. Ask an admin for the supervisor role (chapter 28).
A card says **N/A**	There is no data to calculate it in that period (for example, no conversation resolved yet). Try a longer period.
The **CSAT Score** is empty	The survey is turned off, the trigger is «Manual only» or nobody answered in the period (chapter 17).
The survey did not reach the WhatsApp customer	More than 24 hours passed since their last message (counting the delay), the conversation was reopened before sending, or it was marked as resolved with the «When the conversation is closed» trigger.
The cards show no percentage	There was no data in the previous period to compare.
The day's numbers do not match my team's	Check the time zone in the business hours (chapter 5).
The heat map peaks are shifted by a few hours	The workspace time zone is not your business's.
An agent has conversations that are no longer theirs	They count for whoever had them assigned, also after closing (chapter 14).
The all-workspaces view does not include a workspace	Only the workspaces you belong to are added up.
A conversation does not show up in To review	It is not closed or resolved, has no human agent assigned, was already reviewed or you handled it.
An agent shows as Offline in the supervisor but is working	The status comes from their open inbox: they must have Omnifox open in the browser.
The scheduled report does not arrive	Check that it is active (not Paused), the recipients and the spam folder; use Send test.

Frequently asked questions

How often are the reports updated?

The overview is calculated when you open it or change a filter. The Live supervisor refreshes every 10 seconds and instantly with every event.

Can I see the reports of several workspaces together?

Yes, with **All Workspaces** in the selector; it only adds up the workspaces you belong to.

Why does the team table total not match the total conversations?

The table only counts conversations that had an agent assigned; the total conversations also includes those that were never assigned to anyone.

Does the first response count automatic messages?

No: it is the time until the first reply from a person on your team.

Can I download the charts?

Export the numbers with **Export CSV** and build the charts in your spreadsheet, or use the API.

How many recipients can a scheduled report have?

Up to 25 per schedule. If you need more, create another schedule.

Glossary

The metrics (first response, resolution, CSAT, NPS, response rate...) are defined in chapter 16.

Analytics
The left sidebar menu with Reports, Live supervisor and Scheduled reports.

Overview
The main Reports screen: cards, charts and team table.

Period
The date range chosen with the shortcuts or Custom.

Previous period
The range of the same length right before the chosen one, used to calculate the trends.

Workspace
Each area of your organization, with its channels, its team and its reports.

Rubric
The criteria, with their weight, used to assess the quality of a conversation.

Weighted total
The sum of each score times its weight, over the maximum possible.

SLA
The response or resolution time you commit to.

Workload
The open, pending and snoozed conversations an agent has right now.

Heat map
The chart of messages by day of the week and hour.

CSV
A text file with the data separated by commas, which opens in any spreadsheet.

Scheduled report
The overview delivered by email on its own at the frequency you choose.

Need help?

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