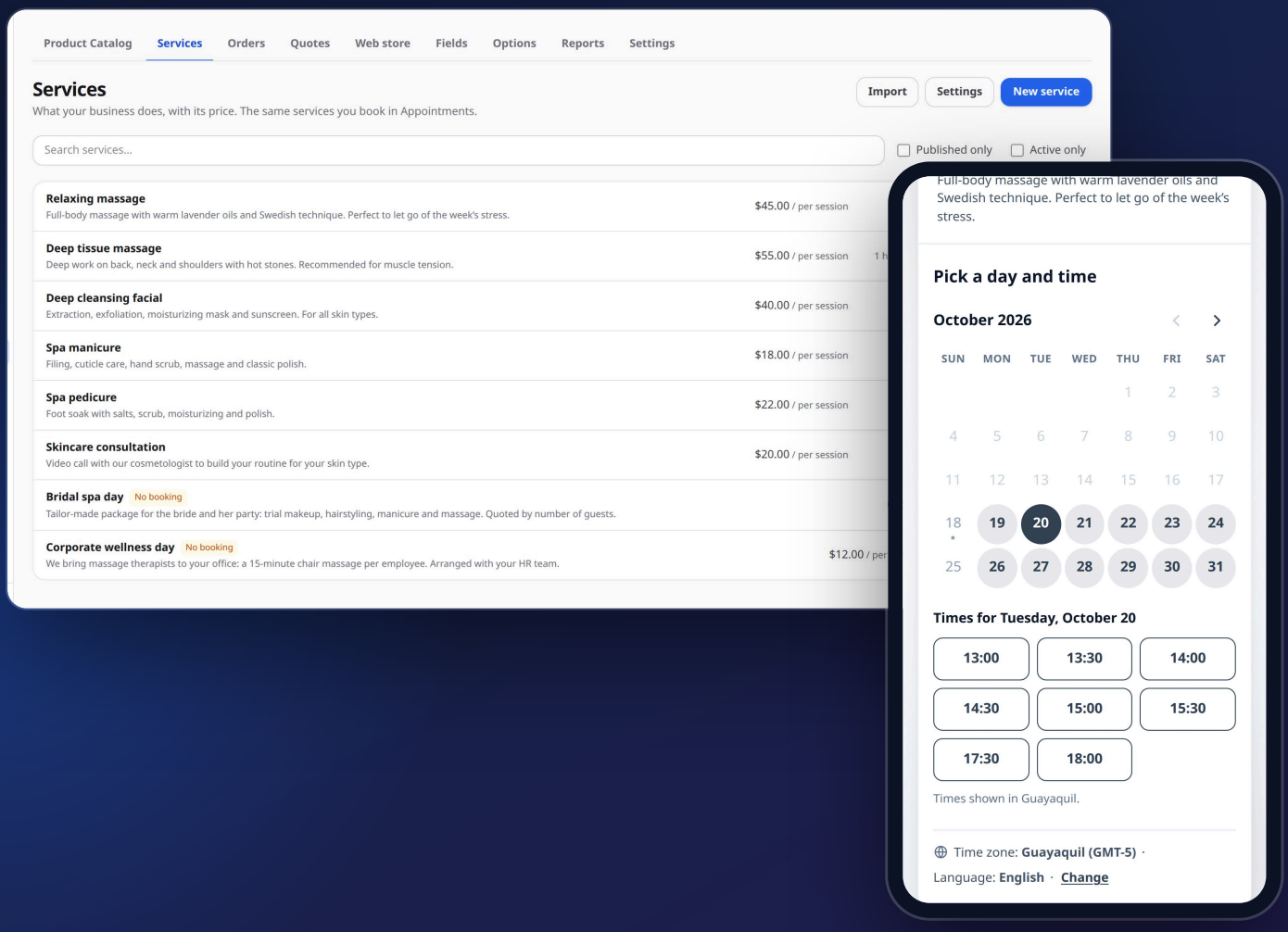
Omnifox

MODULE GUIDE

Services

What your business does, with its price and its duration: the same services you book in Appointments, ready for the booking page, quotes and an AI agent that answers and books over WhatsApp, Instagram, Messenger and your website.



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How to read this guide

The screenshots are real Omnifox screens with a sample business: **Brisa Spa**, a spa in Quito offering massages, facials, manicures and wellness days for companies. The numbers in orange circles 1 point to what is explained under each image.

Button and field names are in **bold**, exactly as they appear on screen. There is also a video tutorial for this module on the Omnifox YouTube channel.

01

CHAPTER 1

What Services is

A Catalog module for businesses that sell work and time: spas, clinics, studios, consultancies, workshops, academies or any service with a price and a duration.

A service is not like a product: it has no stock or barcode, and what the customer asks is not “is it in stock?” but “how much is it?”, “how long does it take?” and “do you have a slot on Tuesday?”. Services stores exactly that: name, description, price with its unit, tax, duration and mode.

Service
Price, unit, tax, duration

→

Appointments
Real slots in the calendar

→

Bookings and quotes
Public page and PDF document

→

AI agent
Answers and books in the chat

One list, not two

Catalog services are **the same** as the appointment types in the Appointments module (Calendar). There is no second list to maintain: in Services you set the price and whether it is published; in **Calendar → Services** you fine-tune how it is booked (buffers, capacity, notice, policies). Change the price in one place and the calendar, the booking page, quotes and the AI agent see it right away.

Business	How it uses it
Spa or beauty center	Massages and facials with a fixed duration that customers book themselves, plus custom packages that are quoted.
Clinic or professional	30 or 60-minute consultations, in person or by video, with a deposit and a cancellation policy.
Consultancy or agency	Hourly or per-project services that take no slot and are quoted.
Workshop or maintenance	Labor priced per visit, per sq ft or per unit.

WHAT IS INCLUDED

Turning Services on is free and does not change your plan. Booking and the booking page use the Calendar module that already comes with your account.

02

CHAPTER 2

Turning the module on

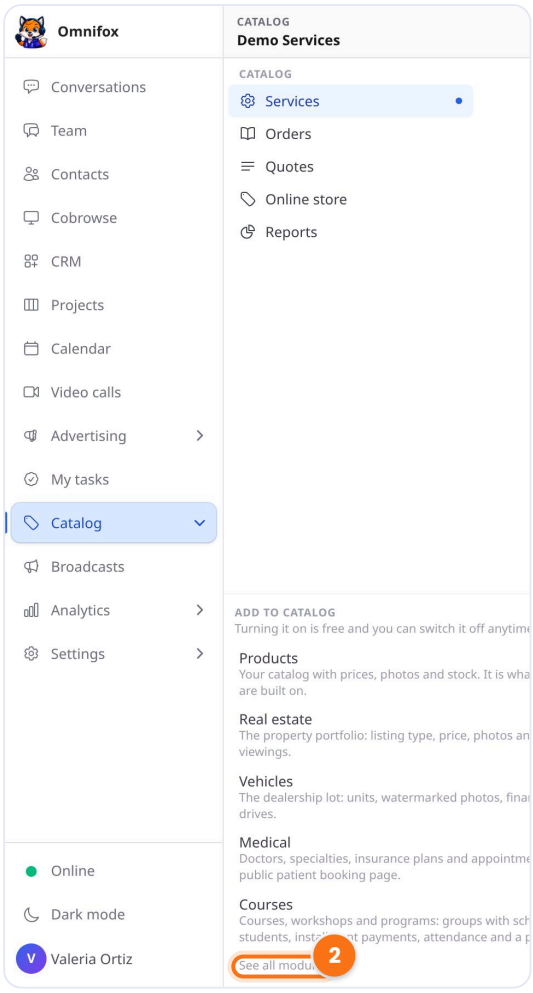
Services is switched on per workspace, in two clicks, right from the menu.

From the Catalog panel

1. In the sidebar, open **Catalog**.
2. At the bottom of the panel, under **Add to catalog**, you see the modules your workspace does not use yet.
3. Next to **Services**, click **Turn on**.
4. The **Services** entry shows up right away at the top, in the Catalog group.

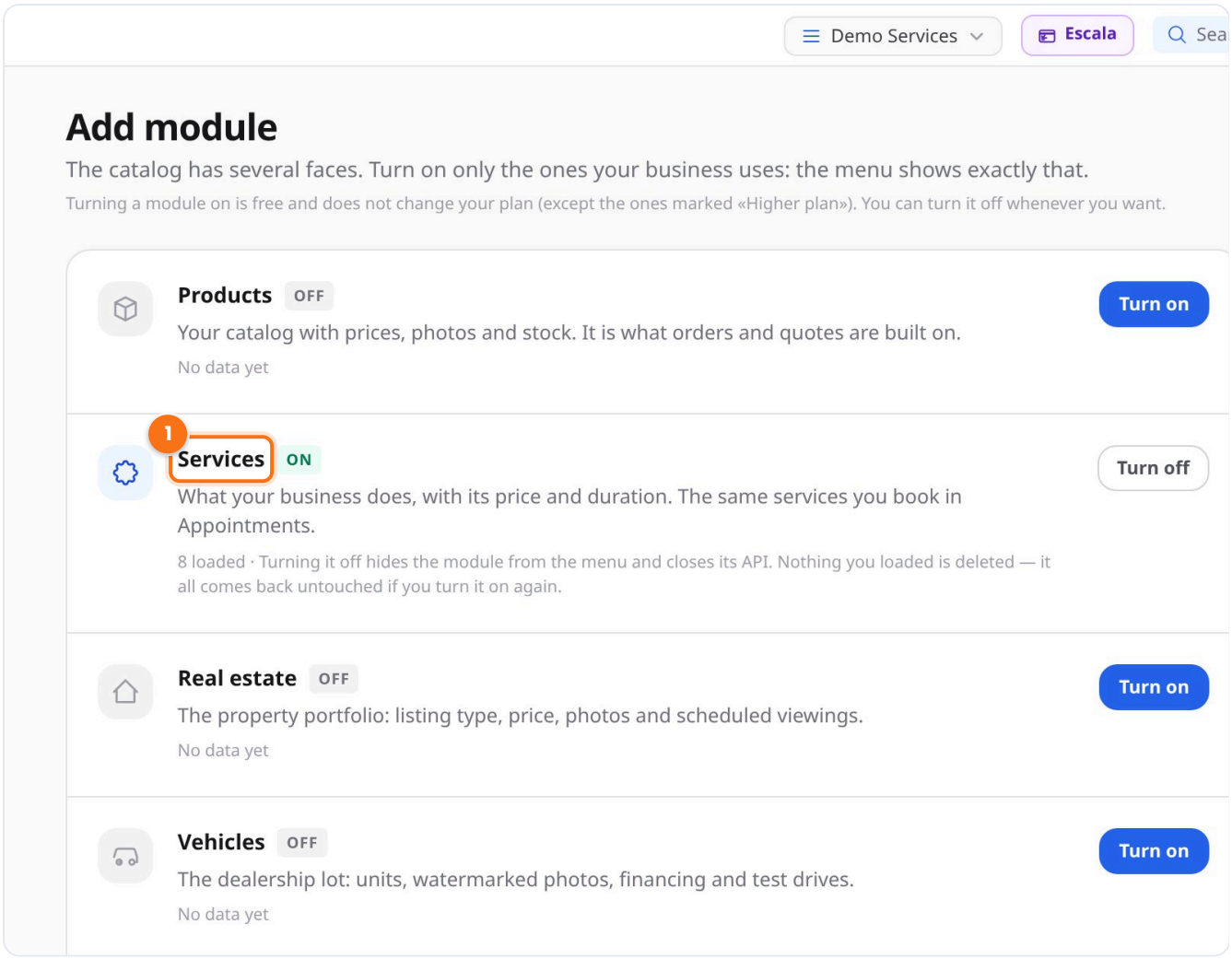
You can also open **See all modules** at the bottom of the panel and switch it on from its card.

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



The Catalog panel with Services already on.

1. **Services**: the module entry.
2. **See all modules**.



The modules screen: each one with its status. Turning it off hides the module from the menu; nothing is deleted and it comes back intact when you turn it on again.

1. Services, on.
2. The button to turn it off.

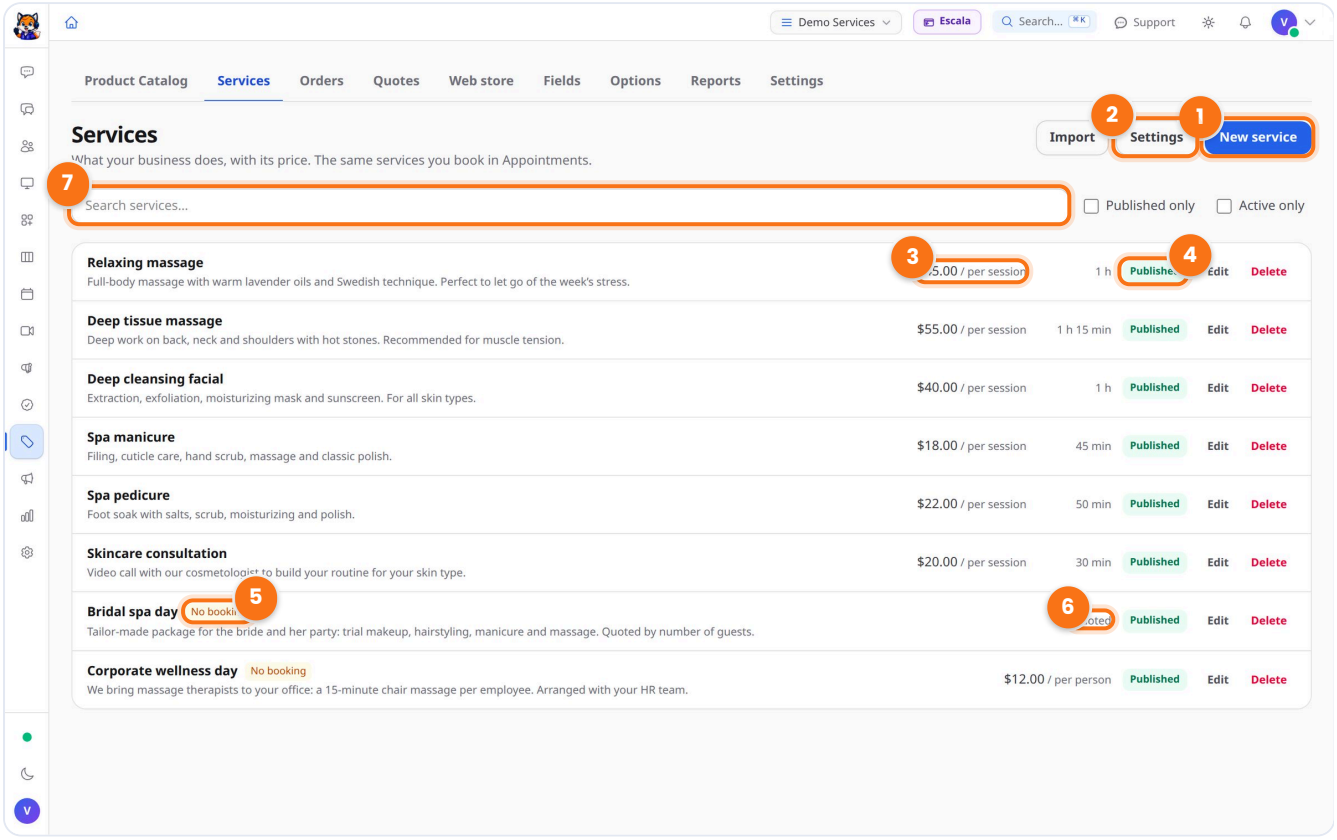
> **TIP**
>
> The AI tools for services do not depend on the menu: if you turn the module off, an agent that already has **Search services** on keeps answering. Check your agents before turning it off.

03

CHAPTER 3

The service list

Everything your business sells in a single list, with price and duration in plain sight.



Catalog → Services with the sample set.

1. **New service** opens the form.
2. **Import** and module **Settings**.
3. Price with its unit (per session, per person) and duration.
4. **Published**: one click publishes or hides it.
5. **No booking**: it takes no calendar slot.
6. **Quoted**: it has no fixed price.
7. Search box and **Published only** / **Active only** filters.

Tag	What it means
Published	Shown to customers and offered by the AI agent.
Not published	It exists and your team can book it, but the AI does not offer it. Handy for internal services or ones still being prepared.
No booking	Sold but takes no slot: arranged by hand (an event, an audit).
Quoted	No price loaded: the AI says it is quoted case by case and never makes up an amount.
Inactive (dimmed row)	Out of use: not booked or offered, but kept.

04

CHAPTER 4

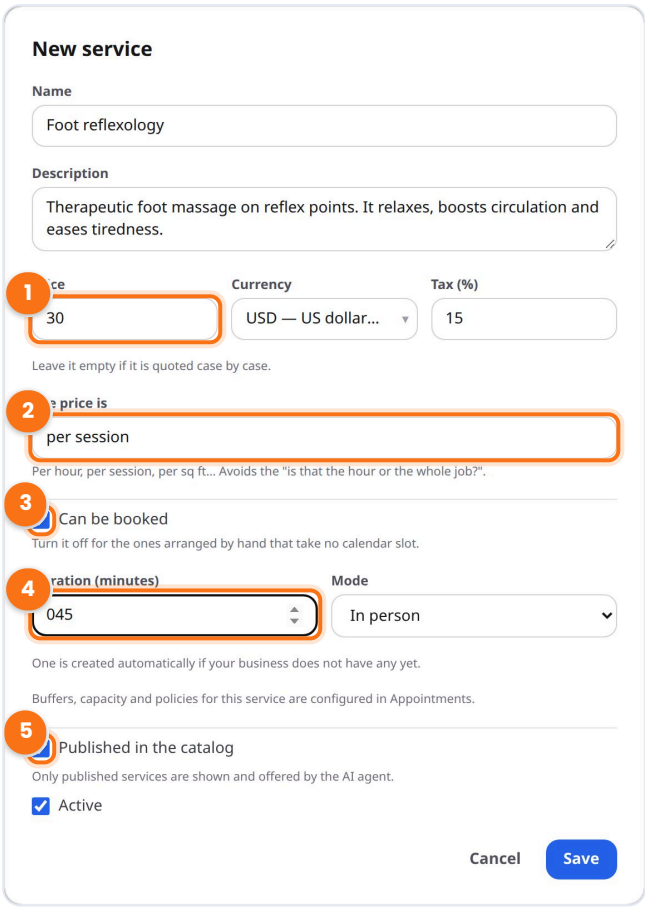
Creating and editing a service

A short form: the commercial part on top, the scheduling part below. Anything you leave empty takes the module default.

1. In **Catalog** → **Services**, click **New service**.
2. Type the **Name** and a short **Description**: customers read it and the AI uses it to recommend the service.
3. Enter the **Price**, **Currency** and **Tax (%)**. If it is quoted case by case, leave the price empty.
4. In **The price is**, type the unit: per session, per hour, per person, per sq ft.
5. If it takes a calendar slot, keep **Can be booked** checked and choose the **Duration (minutes)** and the **Mode**.
6. Check **Published in the catalog** and **Active**, then click **Save**.

TIP

If your business has no calendar yet, when you save the first bookable service Omnifox creates a team calendar with your business hours. That way you can sell from minute one without learning calendar types.



The form with **Foot reflexology**.

1. Price, currency and tax.
2. The price unit.
3. **Can be booked**.
4. Duration and mode.
5. Published and active.

Field by field

Field	What it is for
Empty **Price**	The service shows as **Quoted**. The AI offers a quote or hands over to a person.
The price is	Avoids the “is that 40 per hour or for the whole job?” question. It is shown next to the price and the AI repeats it.
Tax (%)	Copied to each quote line.
Can be booked	Turn it off for services arranged by hand: they never touch the calendar and the AI does not offer to book them.
Duration and **Mode**	The duration builds the real slot in the calendar. The mode (in person, phone, video call, WhatsApp) is shown to the customer and mentioned by the AI.
Published in the catalog	Only published and active services are offered by the AI agent.

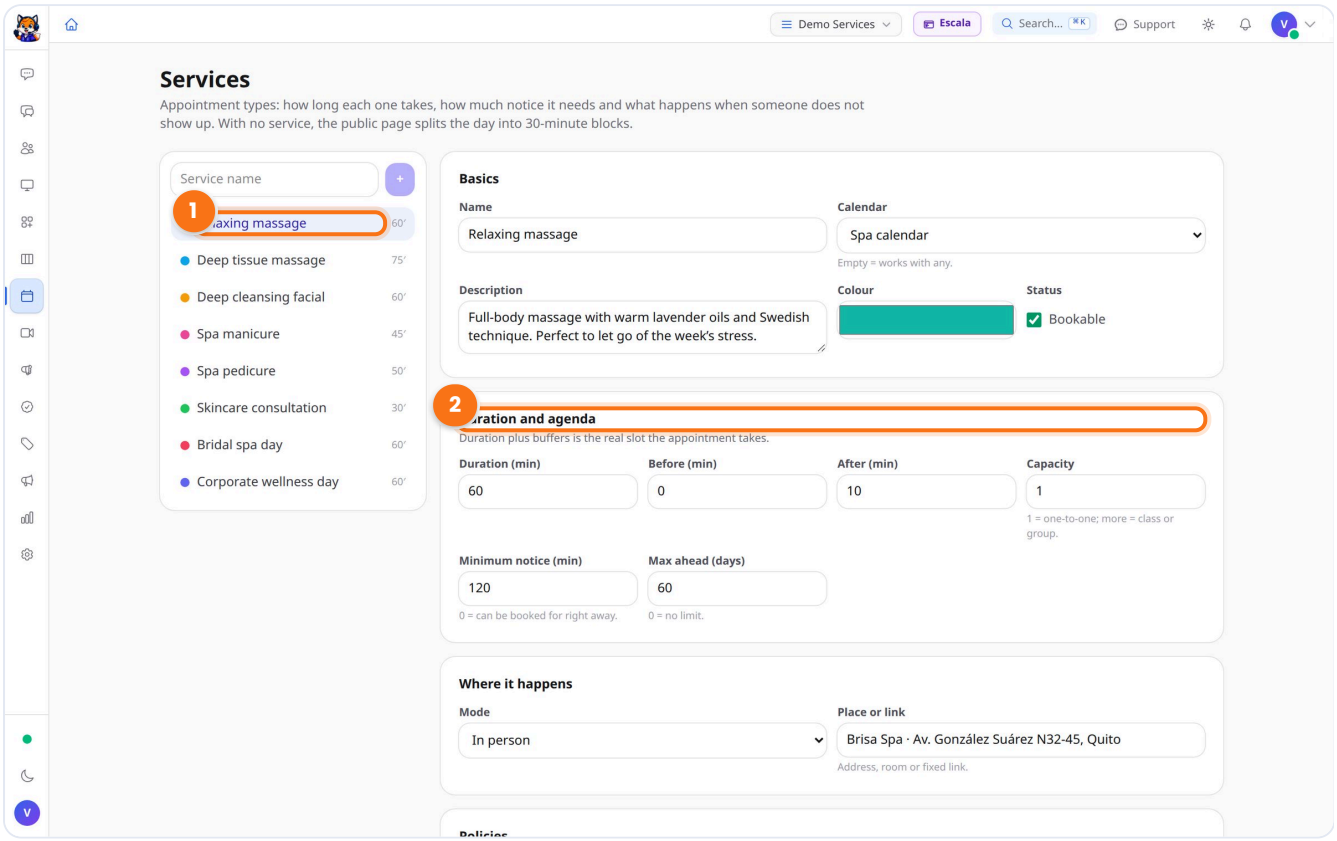
To edit a service, click **Edit** on its row. **Delete** removes it from the list; appointments and quotes already created keep their name and price.

05

CHAPTER 5

Connected to Appointments

The detailed scheduling of each service lives in Calendar → Services. It is the same list as in the Catalog.

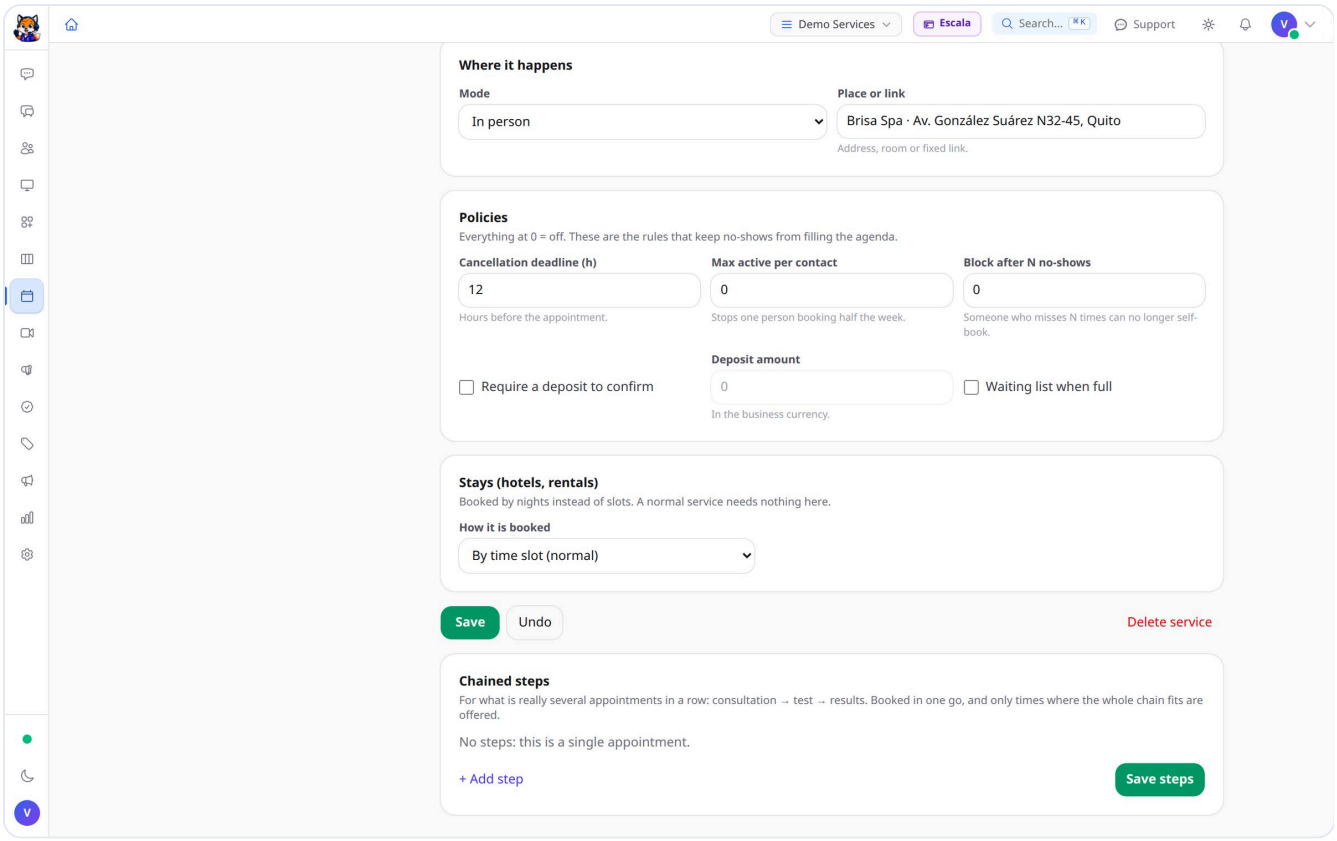


Calendar → Services: the same services, now with their scheduling data.

1 The selected service.

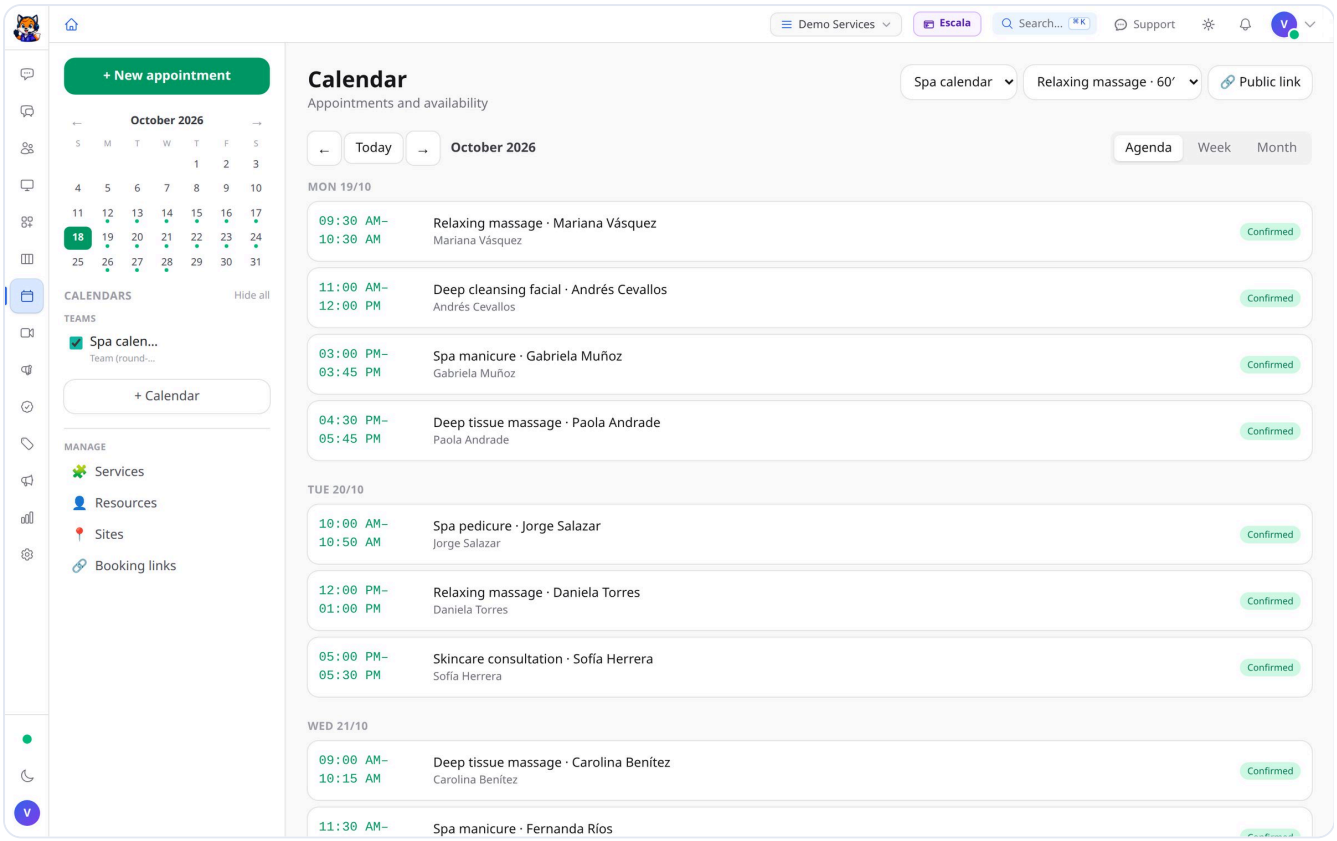
2 **Duration and agenda**.

Field	What it controls
Before (min) / After (min)	Prep time before and after: cleaning the room is added to the real slot.
Capacity	1 = one-to-one; more = class or group.
Minimum notice (min)	How far ahead people must book (120 = two hours' notice).
Max ahead (days)	How many days ahead people can book.



The **Policies**: the rules that keep your calendar from filling up with no-shows.

Policy	What it does
Cancellation deadline (h)	Hours before the appointment until when the customer can cancel.
Max active per contact	Stops one person from booking half the week.
Block after N no-shows	Someone who misses N times can no longer self-book.
Require a deposit to confirm	Asks for a deposit to confirm; the AI mentions it when offering the service.



Booked appointments show up in the **Calendar** with the service name and its real duration.

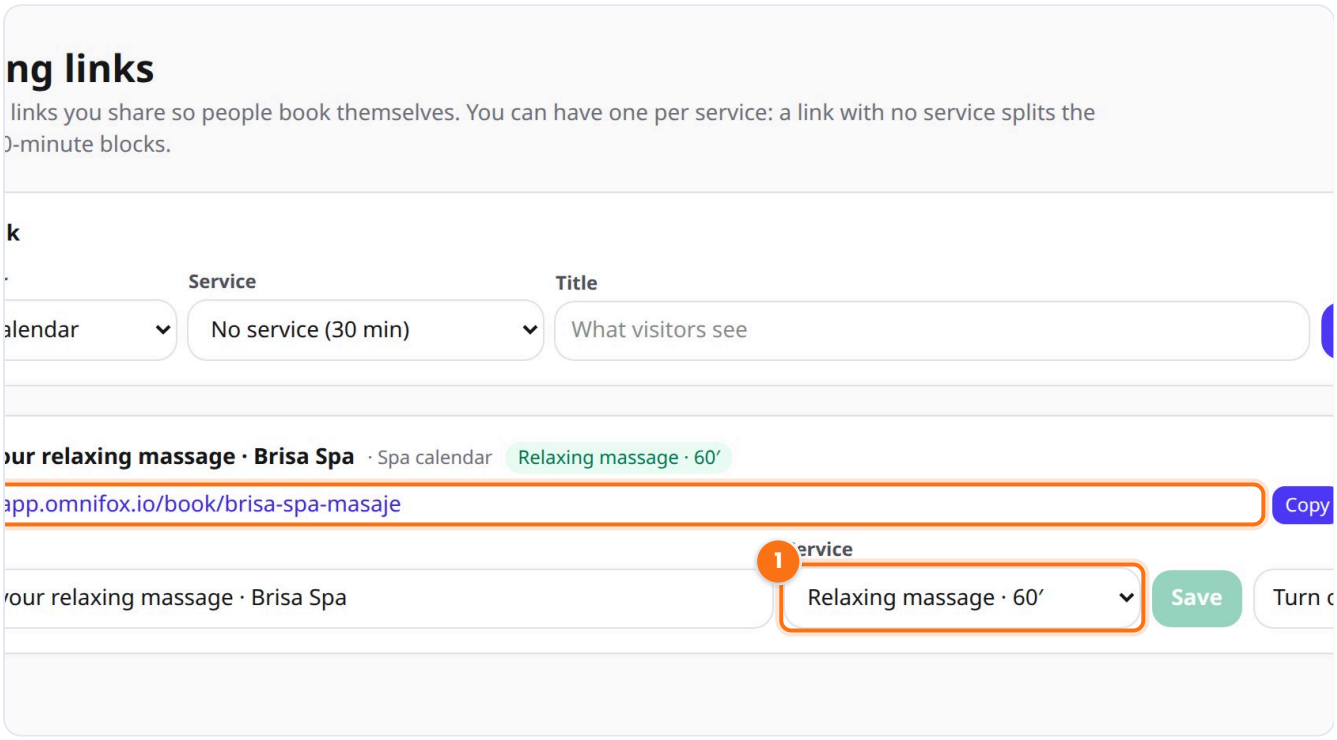
06

CHAPTER 6

The public booking page

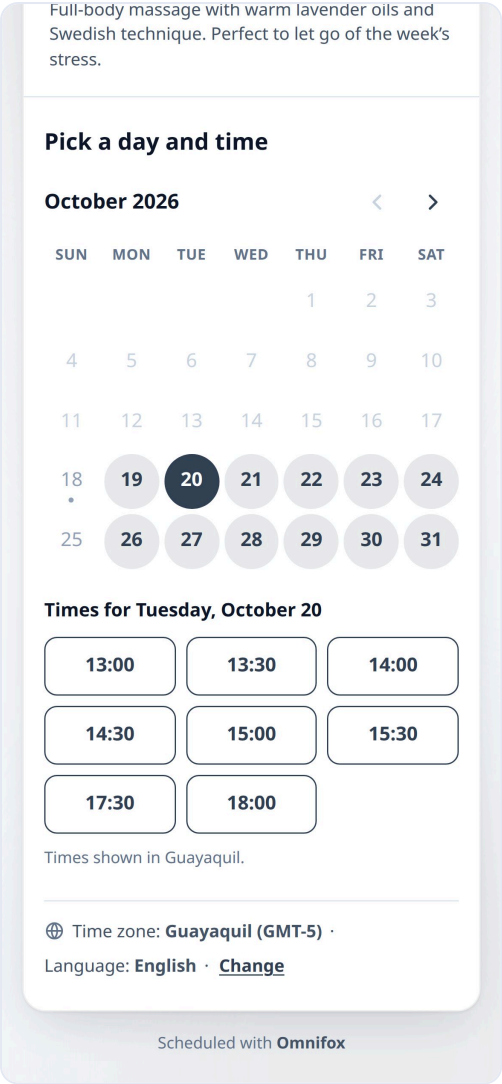
One link per service so your customers can book on their own, from their phone, at any time.

1. Go to **Calendar → Booking links**.
2. Under **New link**, choose the **Calendar**, the **Service** and type the **Title** the customer will see.
3. Click **Create link** and then **Copy** to share it on WhatsApp, social media or your website. **Copy embed** gives you the snippet to embed it on your site.

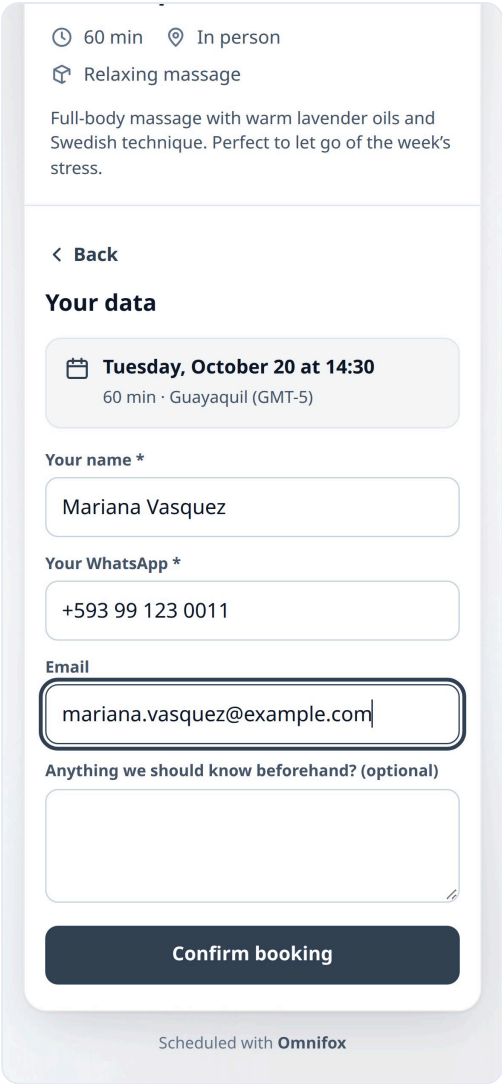


Booking links: the relaxing massage link.

1. The link's service: it sets the slot length.
2. The public address to share.



It opens on the first day with free times; the customer picks a day and sees only the available times.



They tap a time, leave their name, WhatsApp and email, and confirm.

Times are worked out from the service duration, buffers, the calendar hours and existing appointments; a taken slot is never offered. The page detects the visitor's country to show times in their time zone. On confirmation, the appointment goes into your calendar and the team is notified.

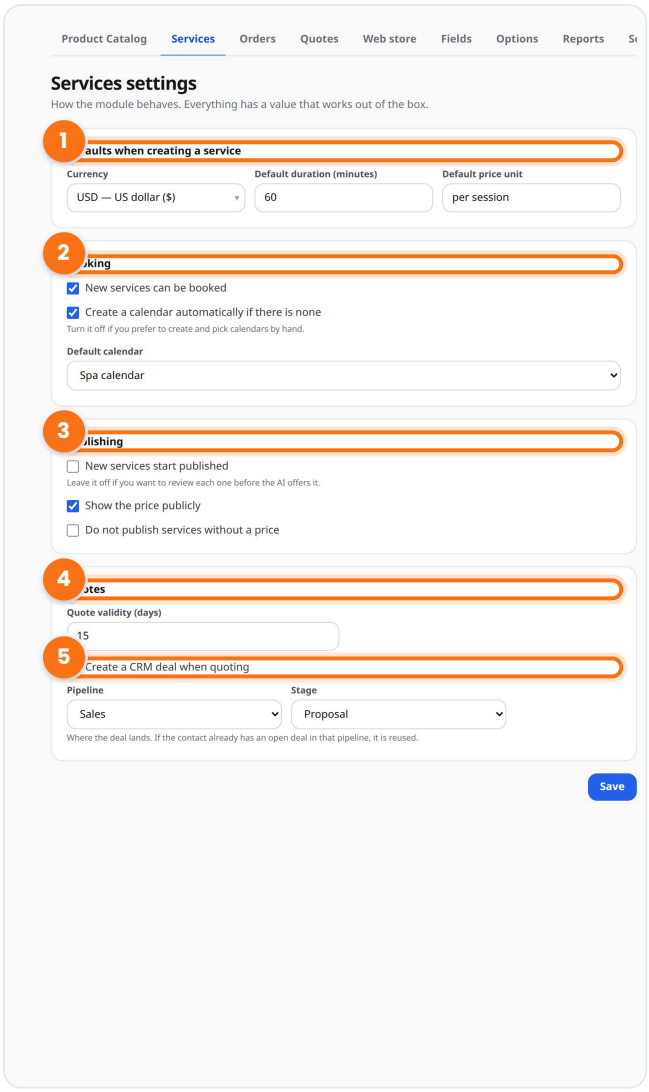
> **NOTE**
> The booking page shows the service name and duration, not the price. If you want customers to see the price before booking, include it in the message with the link or let the AI agent tell them.

07

CHAPTER 7

Module settings

Defaults and module rules. Everything has a value that works out of the box: someone who only wants to price three services never needs to open this screen.



Services → Settings.

1. Defaults when creating a service
2. Booking
3. Publishing
4. Quotes
5. Create a CRM deal when quoting

Section	What you set
Defaults when creating a service	Currency, duration and price unit every new service starts with.
Booking	Whether new services can be booked, whether a calendar is created automatically when there is none, and which one is the **Default calendar**.
Publishing	**New services start published**: leave it off to review each service before the AI offers it. **Show the price publicly**: if off, the AI agent does not give prices (it offers to have someone on your team confirm them) and the service card you send to the chat has no price. **Do not publish services without a price**: the AI and the sharing picker do not offer services without a price.
Quotes	**Validity (days)**: every new quote with services gets that expiry date unless you set another. **Create a CRM deal when quoting**: when on, you choose the **Pipeline** and **Stage**; every quote with services opens a deal for that contact (if they already have an open one in that pipeline, it is reused).

NOTE

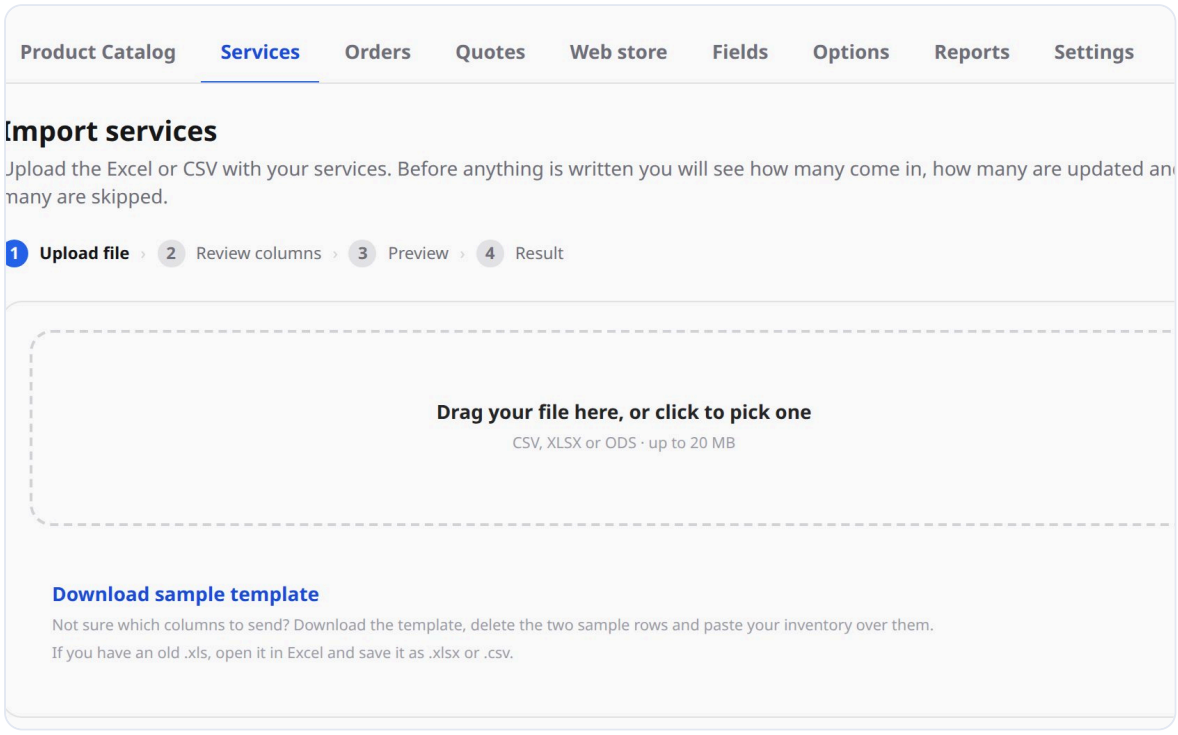
Settings can only be saved by the account owner or an administrator. The rest of the team sees them read-only.

08

CHAPTER 8

Importing services

If your services are already in a spreadsheet, upload them in one go.



Import services: four steps, and nothing is saved until the end.

1. In **Catalog** → **Services**, click **Import**.
2. If you are not sure which columns to use, click **Download sample template**, delete the sample rows and paste your services.
3. **Upload file**: drag your CSV, XLSX or ODS file (up to 20 MB).
4. **Review columns**: confirm which column is the name, price, duration...
5. **Preview**: you see how many come in, which ones are updated and which are skipped, before anything is written.
6. **Result**: the final summary.

> **TIP**
> If you have an old .xls file, open it in Excel and save it as .xlsx or .csv before uploading.

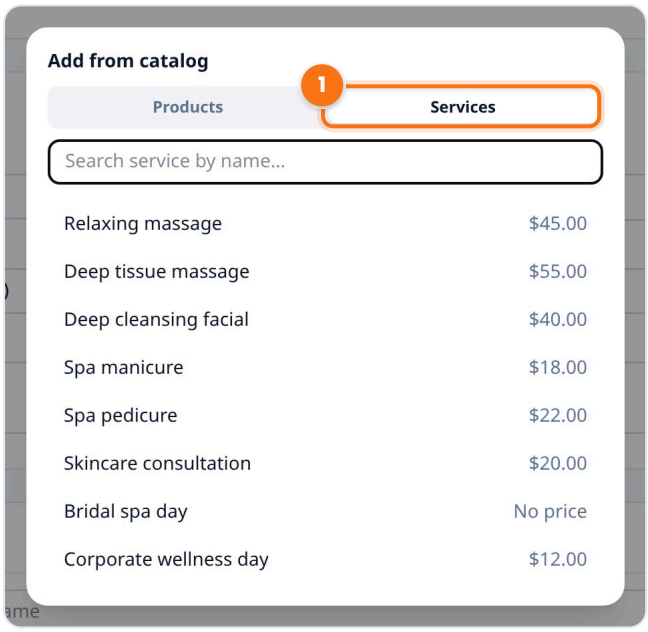
09

CHAPTER 9

Quoting services

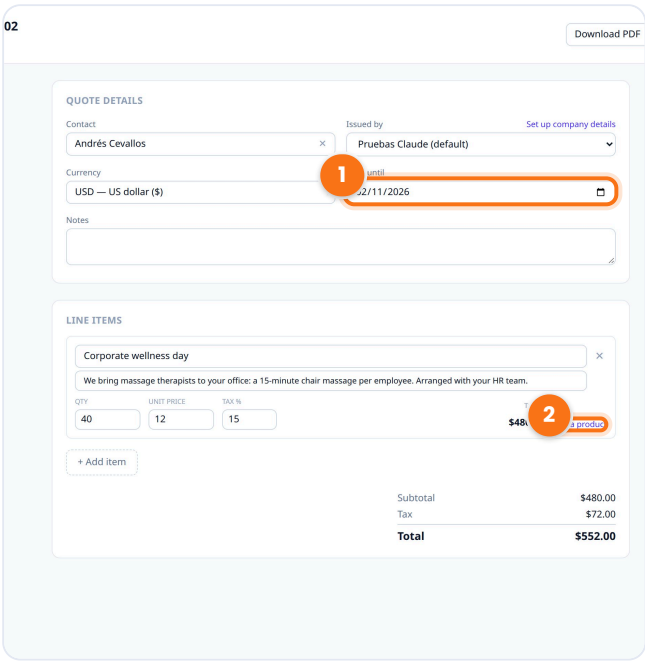
Services go into the same quotes as products, with price and tax copied from the service record.

1. In **Catalog** → **Quotes**, click **+ New quote** and choose the **Contact**.
2. On the line, click **Pick a product** and open the **Services** tab. Search for the service and pick it.
3. The line fills in with the name, description, price and tax from the record. Adjust the **Quantity**.
4. Click **Save quote**. If you left **Valid until** empty, it is filled with the validity from Settings.



Pick a product → **Services** tab: your services with their prices.

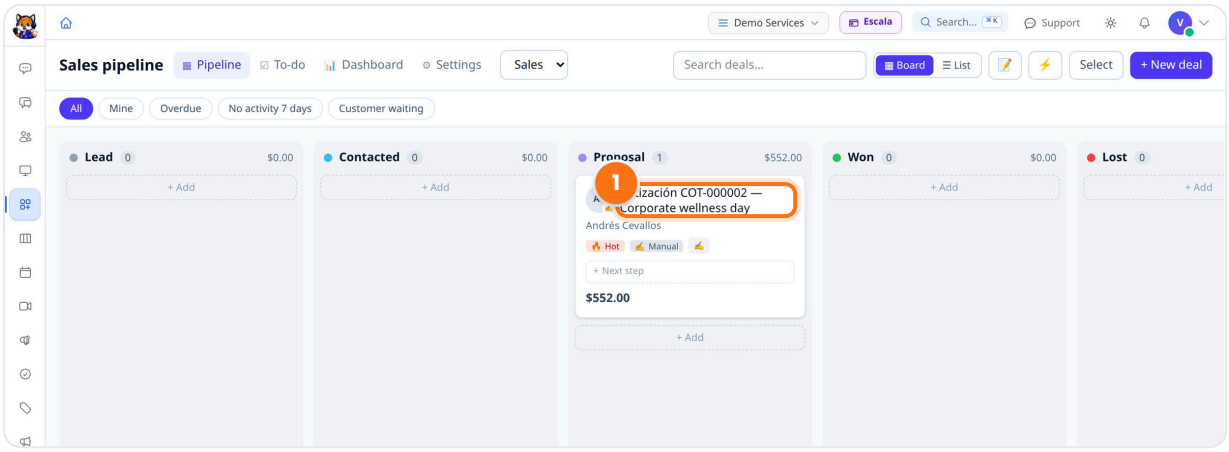
1 **Services**



The saved quote: 40 people for the wellness day; the validity filled in by itself.

1 **Valid until** 2 **Pick a product**

Each line keeps a copy of the service name, price and tax at the time of quoting: if you change the price tomorrow, quotes already sent stay the same. The total adds itself up. From the quote you can **Download PDF**, **Send quote** through the chat or by email, and the customer accepts or rejects it on its public link.



With **Create a CRM deal when quoting** on, the quote opens a deal in the chosen pipeline and stage, with the quote amount. When it is accepted, the deal is marked won.

1 The quote's deal

How a service is added	Detail
The AI agent	With the **Send quotes** tool on, it builds the quote in the conversation using catalog services; the price always comes from the record.
Your team, by hand	In **Quotes** → **New quote**, with **Pick a product** → **Services**.
The API	Lines with `item_type: service` and the service id.

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CHAPTER 10

Setting up the AI agent

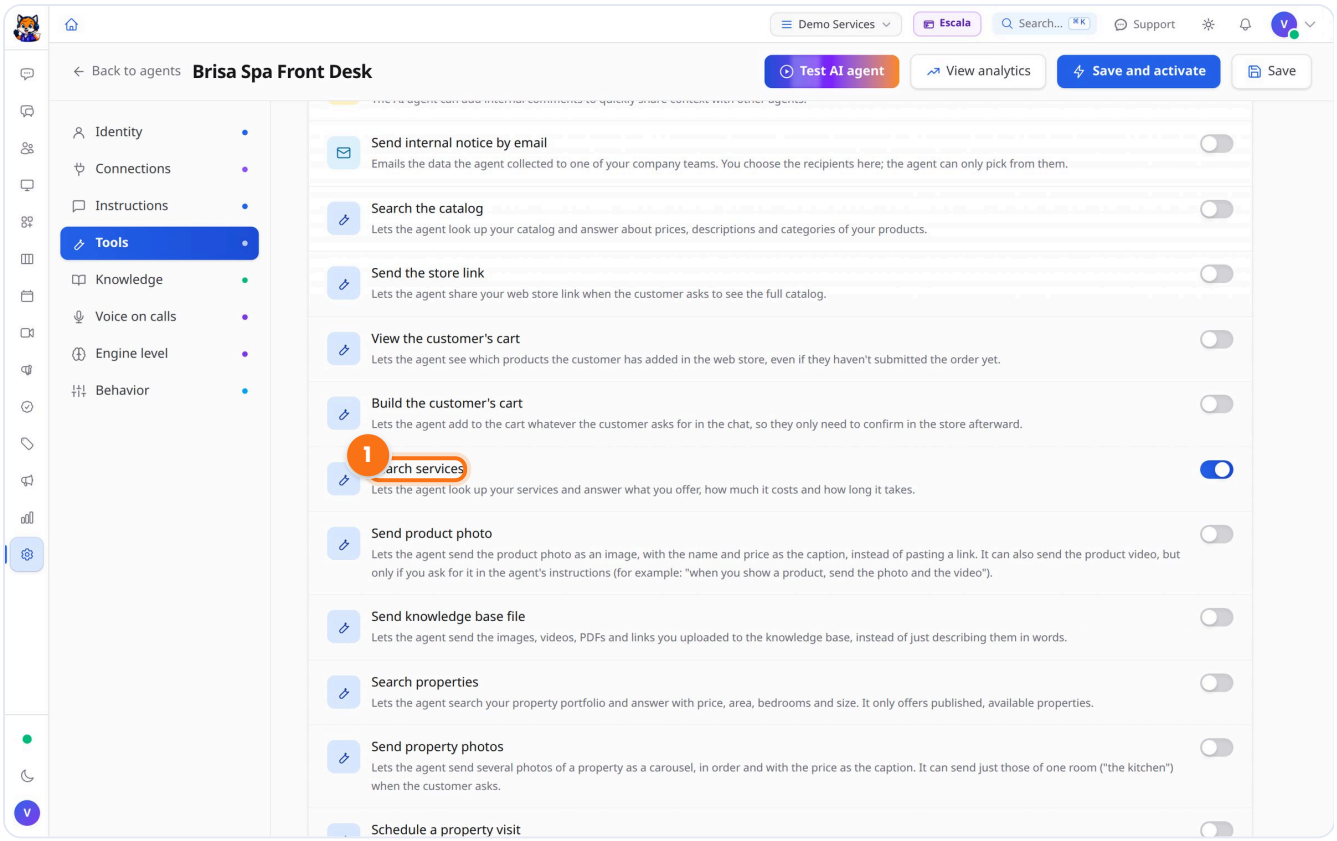
An agent that knows your services: it gives real prices and durations, checks the calendar and books, without making anything up.

The tools

Tool	What it does
Search services `search_services`	Reads published, active services: price with unit, duration, mode, whether it can be booked and whether it needs a deposit. Read-only.
Check appointment availability `check_availability`	Finds real free slots in the calendar for that service.
Book appointment `book_appointment`	Creates the appointment once the customer confirms day and time.
Send quotes `create_quote`	Builds a quote with catalog services (and products).

Step by step

1. Go to **AI agents** and click **Create AI agent** → **Start blank** (or open an agent you already have).
2. In **Identity**, give it a name: **Brisa Spa Front Desk**.
3. In **Instructions**, paste the sample prompt on the next page and adapt it to your business.
4. In **Tools**, switch on the four tools in the table and click **Save**.
5. Test it in the **Live tester** before connecting it to a channel.



Tools: the services tool in the catalog group.

1 **Search services**

Sample prompt

Tools are referenced with `!`: the editor highlights them. Change it with your business details; you do not need to touch it when prices change, because the AI reads them from the catalog in every conversation.

```
# Role
You are the front desk of Brisa Spa, a spa in Quito. You answer on WhatsApp, Instagram, Messenger and
the website chat. Your goal is to answer questions about our services with real data and, when the
person is ready, book their appointment.

# Tone
- Warm, calm and professional.
- Short messages: 2 to 4 lines. One question per message.
- Reply in the language the person writes in.

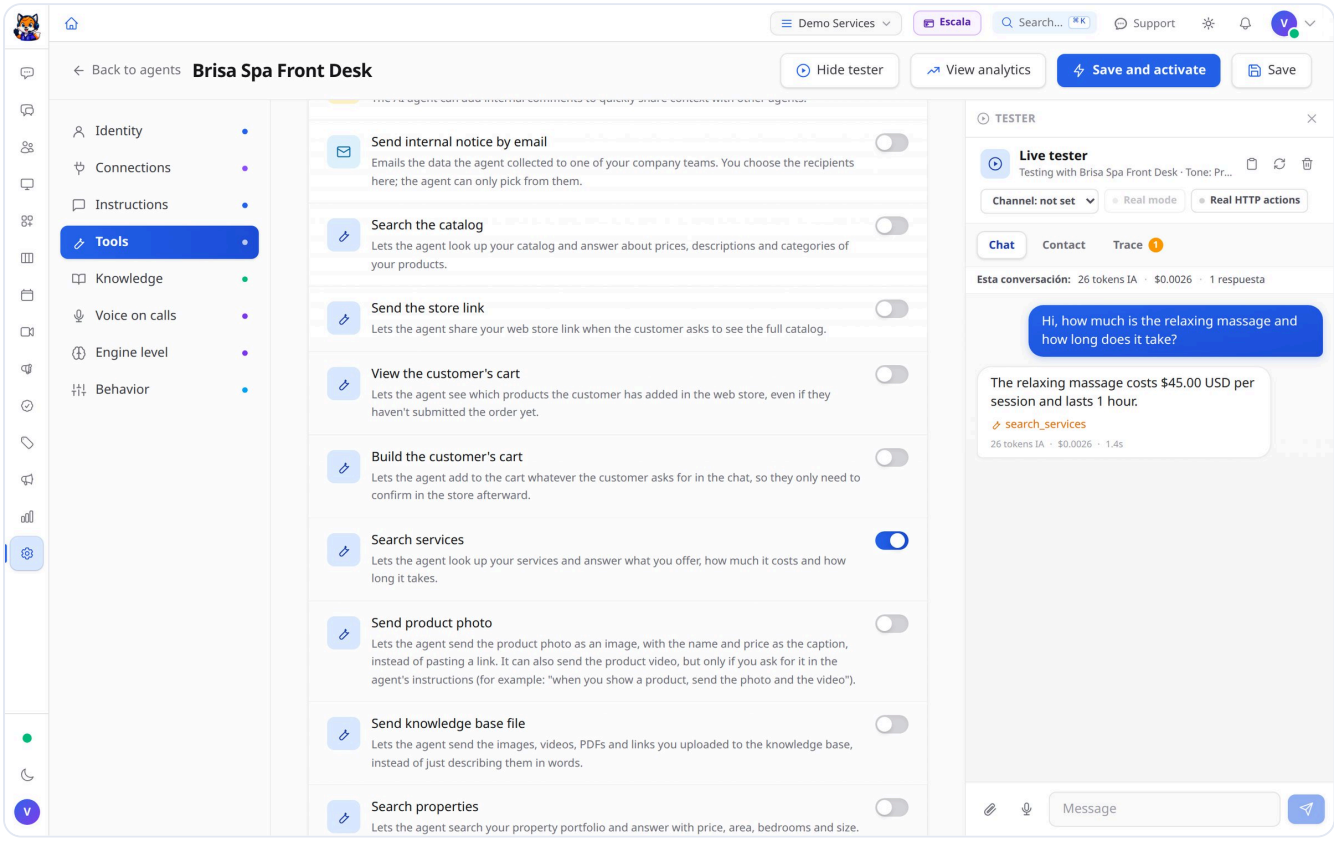
# When to use !search_services
- ALWAYS before giving a price, a duration or a mode. Never answer those from memory.
- Give the exact price with its currency and unit (per session, per person).
- If a service says "quoted", don't make up an amount: offer to put together a quote.
- If you can't find what they ask for, offer the closest service on the list.

# How to book
1. Use !check_availability with the service and the day the person asks for.
2. Offer at most 3 free times.
3. Ask for full name and mobile number if you don't have them.
4. Repeat service, day and time, and wait for a "yes".
5. Only then use !book_appointment.

# Quotes (!create_quote)
- For company events, groups or bridal packages: ask how many people and the date, and build the quote.
- If the service has no price loaded, hand the case over to a team member.
```

```
# Never
- Make up services, prices, times or promotions.
- Book without explicit confirmation.
- Ask for card details in the chat.
```

Testing it



The **Live tester**: the AI used `search_services` and answered with the price and duration from the record.

- Ask for the price and duration of a service, and for one that does not exist: it should offer the closest one, not invent it.
- Ask for a slot on a specific day: it should check availability and offer free times.
- In the tester, booking and quoting are **simulated**: no real appointment or quote is created. Lookups (services and availability) do read your real data.

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CHAPTER 11

FAQ and current limits

The most common questions and what the module does not do yet, so you know before promising it to a customer.

Current limits (October 2026)

No photos
Services have no photo gallery; they are described with text.

Not in the Web store
The public store shows products. For services, share the booking link.

No online payment
Booking does not charge: the deposit is collected through your usual methods.

Price only in chat
The booking page does not show the price; the AI agent does.

Frequently asked questions

Does turning Services on cost anything?

No. It is free and does not change your plan.

Do I need to load services twice, in the Catalog and in Appointments?

No. It is the same list: whatever you create on one side appears on the other.

Can I sell something that is not booked, like an event?

Yes: turn off **Can be booked**. It shows the no-booking tag, it can be quoted and the AI does not offer to book it.

What happens if I leave the price empty?

The service shows as “quoted” and the AI offers a quote or hands over to a person; it never makes up an amount.

Can I stop the AI from giving prices?

Yes: in Settings turn off **Show the price publicly**. The agent will not give amounts and will offer to have someone on your team confirm them.

Can the AI book without the customer confirming?

The sample prompt tells it to repeat service, day and time and wait for a “yes”. And it only offers times the calendar has free.

Can I have a service the AI does not offer?

Yes: leave it unpublished. Your team can still book it from the Calendar.

Does it work with several professionals or rooms?

Yes: in **Calendar → Resources** you define people or rooms with their own hours, and each service uses the calendar you assign.



Need help?

Write to us from **Support**, top right in Omnifox, or watch the module's video tutorial on the Omnifox YouTube channel. More at omnifox.io.