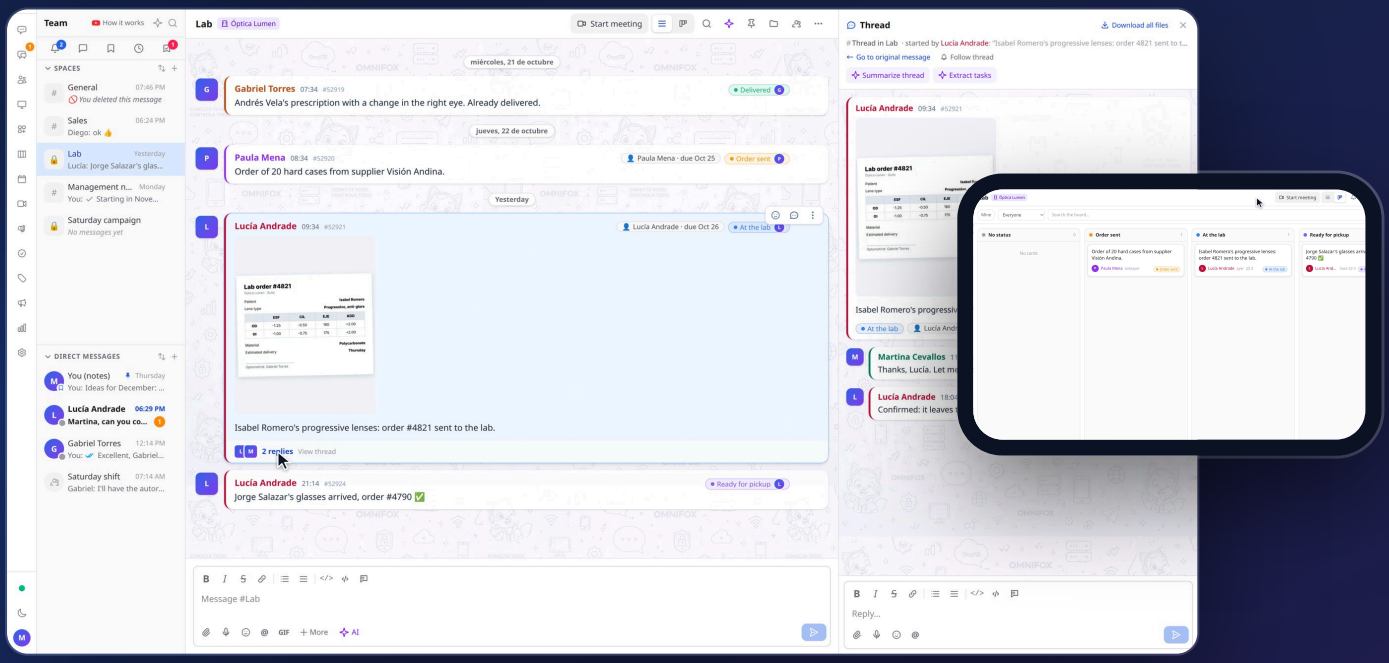
Omnifox

COMPLETE GUIDE · USER MANUAL

Team

Your team's whole internal chat in Omnifox, step by step: spaces, direct messages, threads, statuses, tasks with an assignee and due date, board, AI, calls and the link to your inbox.



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How to read this manual

The screenshots are real Omnifox screens with a sample business, **Óptica Lumen**, a fictional optician in Quito. The person using the screen is Martina, the manager, who works with Valeria, Diego, Lucía, Gabriel and Paula. The messages and customers are made up.

Button and field names are in **bold**, just as they appear on screen. This manual follows the same chapters as the «Team complete guide» video on the Omnifox YouTube channel. Some features depend on your plan and on the permissions your admin gives you.

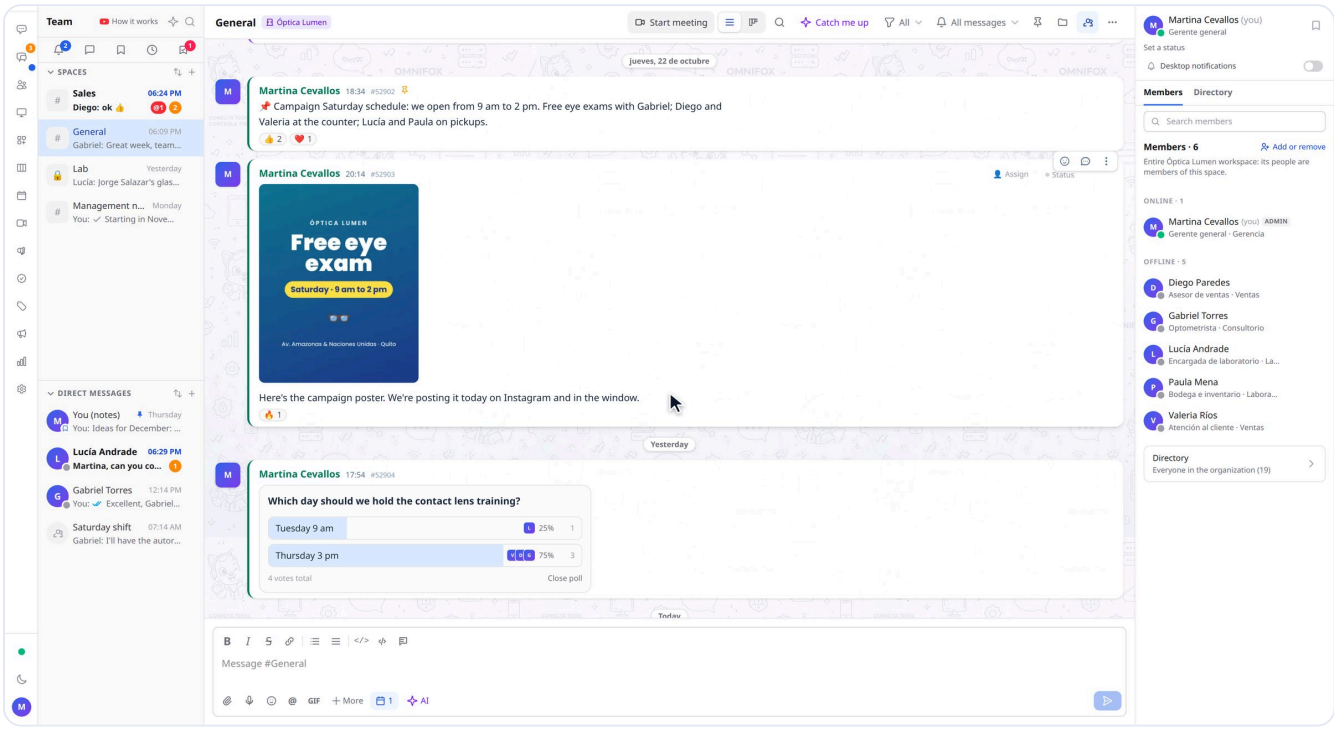
01

CHAPTER 1

A tour of Team

Talk, split up the work and follow it through without leaving the platform where you serve your customers.

Team (the **Team** menu in the sidebar) is Omnifox's internal messaging. It's built for what the team talks about *around* the work: announcements, questions, requests between areas and task follow-up. Nothing written in Team ever reaches a customer.



Team: spaces and direct messages on the left, the conversation in the middle and people on the right.

Area	What you find
Left	The shortcuts, your **Spaces** and your **Direct messages**.
Middle	The open conversation: the header with its tools, the messages and the editor.
Right	People: the space **Members** and the **Directory** of your whole organization. Threads and profiles also open here.

Shortcuts

Shortcut	What it is for
Mentions & activity	Your personal inbox: mentions, tasks assigned to you and reactions (chapter 18).
Your threads	The threads you follow, with the ones that have new replies marked (chapter 9).
Saved	The messages you saved for yourself (chapter 12).
Reminders	The reminders you set with **Remind me** (chapter 12).
My tasks	Everything assigned to you, across all spaces (chapter 16).

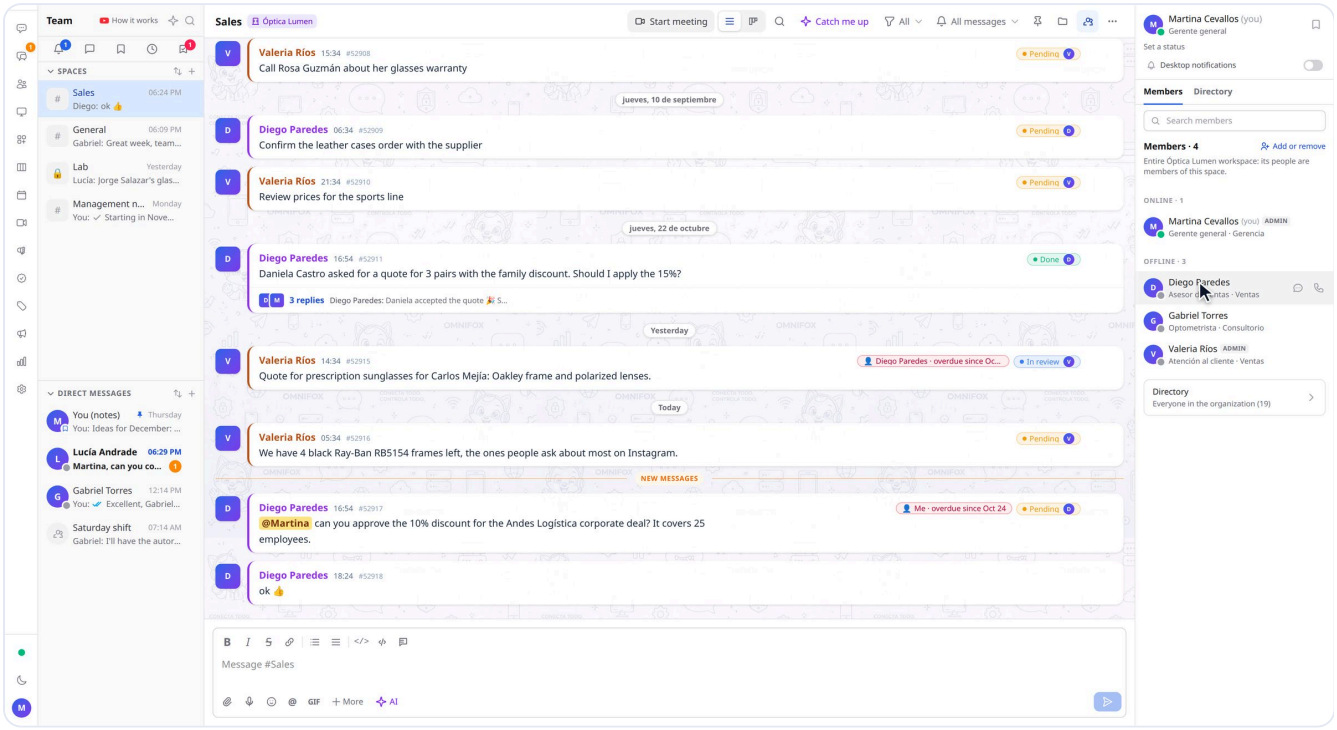
Each row in the list shows the last message, who wrote it and the time. In bold with the orange dot, what you haven't read; with the **@**, where you were mentioned. The **How it works** button opens the video and this manual.

02

CHAPTER 2

Spaces: public, private and announcements

Your team's rooms, one per topic or area.

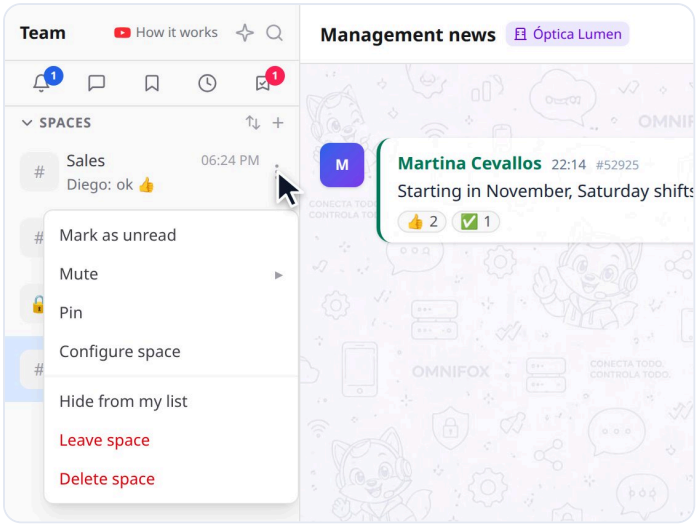


An open space, with its scope in the header and its members on the right.

Type	Who sees it and who posts
Public (#)	Everyone in its scope (the organization or the workspace) can find and open it.
Private (padlock)	Only its members can see it.
Announcements	Only admins post; everyone else reads and reacts. Ideal for official news.

The header shows the space name and its scope (**Organization-wide space** or **Workspace space**). The right panel lists its members, with their job title and area.

The row menu



The three-dot menu of a list row.

The three-dot menu of each space or chat in the list lets you mark it as unread, **Mute** it or set it to **Mentions only**, pin it to the top of the list, hide it, configure the space or leave it (and, if you're an admin, delete it).

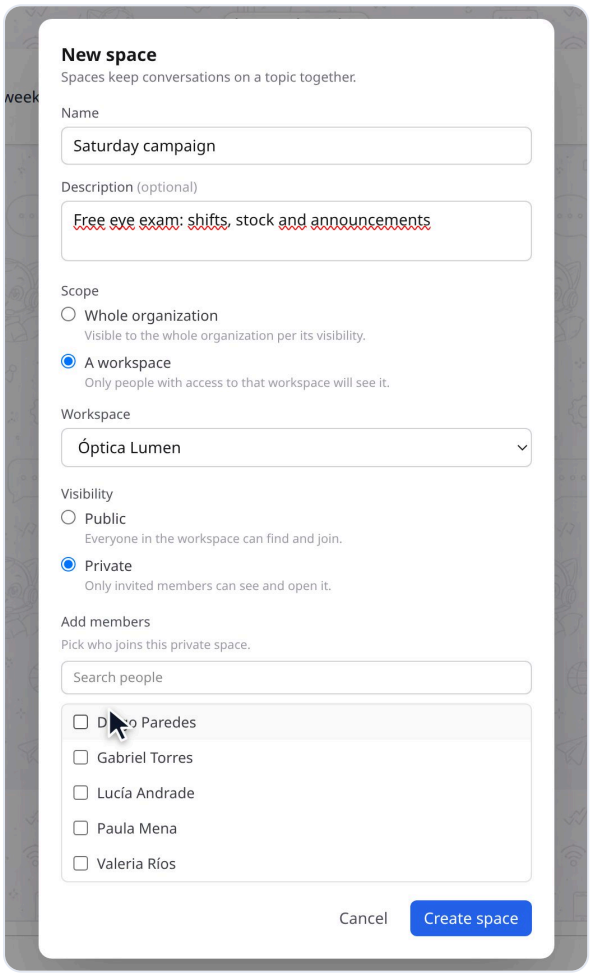
03

CHAPTER 3

Create a space

Open a new room for a project, a campaign or an area.

1. Tap **+** next to **Spaces** (**New space**).
2. Type the **Name** and, if you like, a **Description**.
3. Choose the **Scope**: **Whole organization** or **A workspace** (only people with access to that workspace will see it).
4. Choose the **Visibility**: **Public** or **Private**. For a private space, check the people under **Add members**.
5. Tap **Create space**: it appears in the list of all its members.



New space: private, in one workspace, choosing its members.

> **NOTE**
>
> Only organization admins can create spaces. The scope is set when the space is created and cannot be changed later.

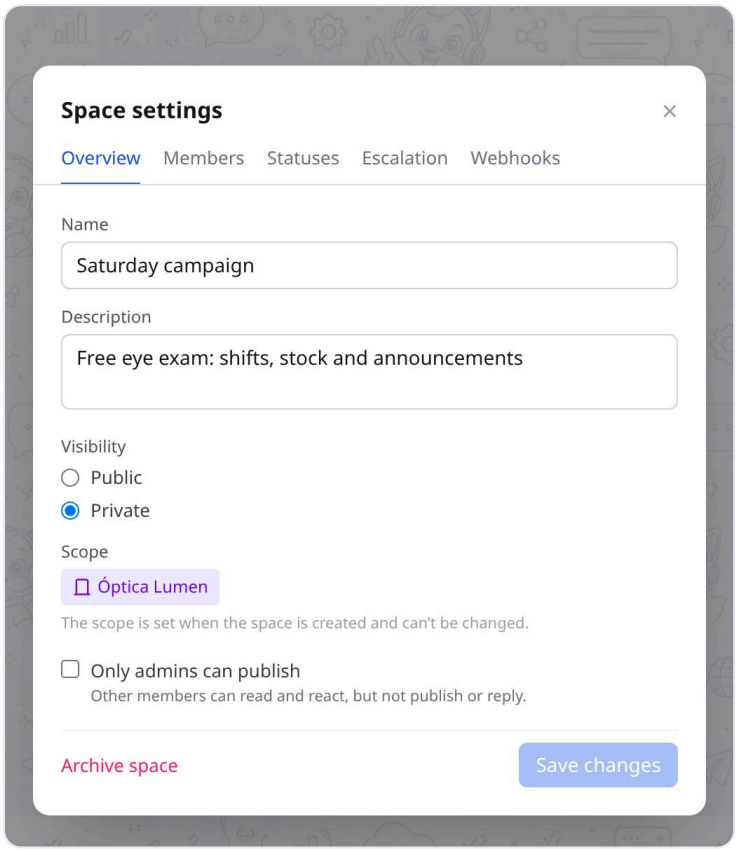
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CHAPTER 4

Manage the space

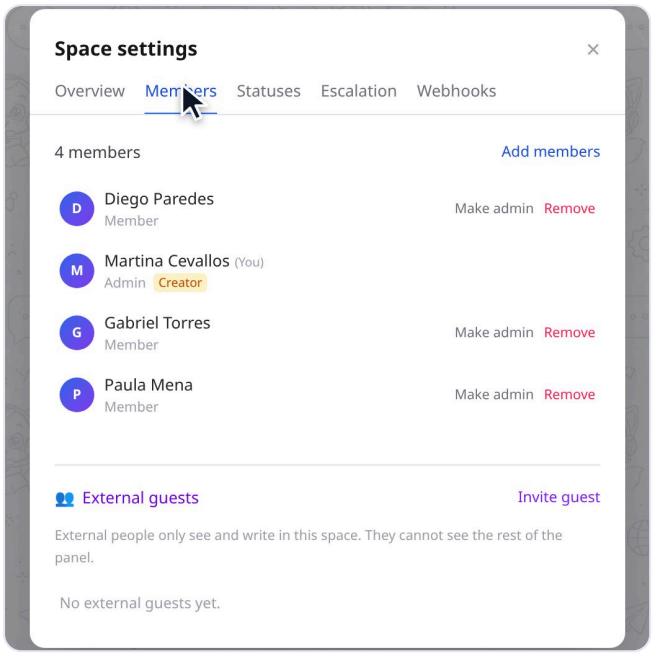
Name, members, guests, statuses, escalation and webhooks.

Open the three-dot menu in the space header and choose **Manage space**.

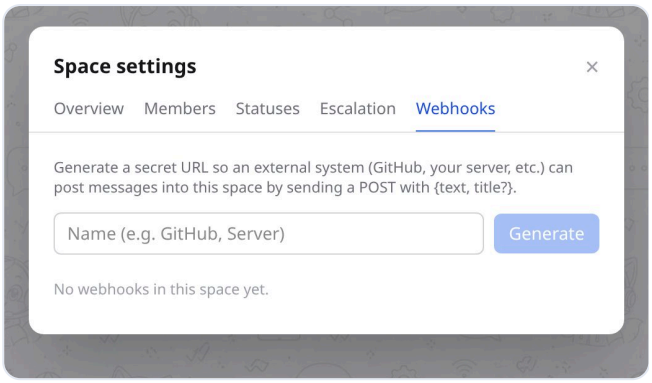


Manage space, General tab.

Tab	What you do there
Overview	Change the name, description and visibility, turn on announcement mode or archive the space (it stays hidden for everyone until it is unarchived).
Members	Add people, make them admins (**Make admin**) or remove them. In private spaces you can invite external people, like a supplier: they only see that space.
Statuses	The message statuses of the space (chapter 14).
Escalation	Automatic reminders when a task sits still (chapter 16).
Webhooks	A secret address so other systems can post messages to the space automatically.



Members tab, with external guests.



Webhooks tab.

HEADS UP

The webhook address is secret: anyone who has it can post to the space. If it leaks, generate a new one.

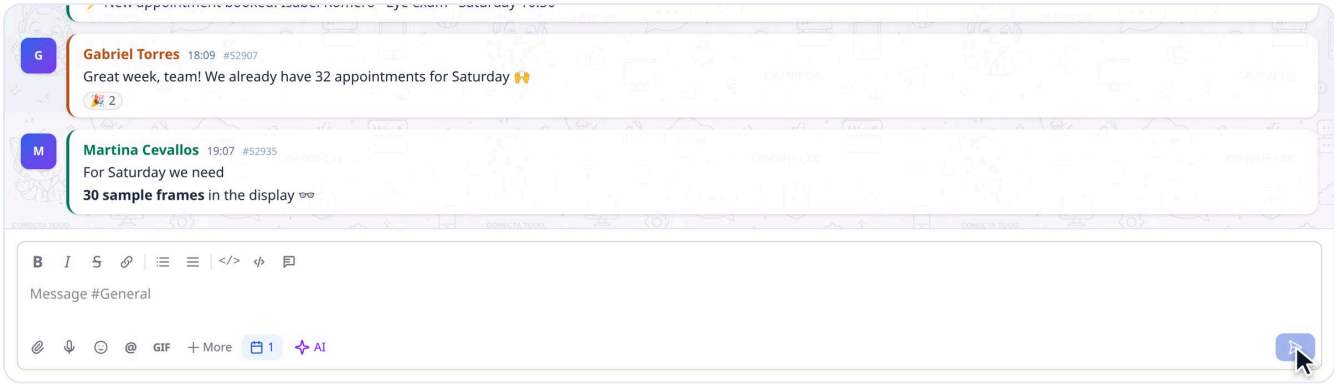
05

CHAPTER 5

Writing and formatting

As easy as any chat, with formatting when you need it.

1. Type in the editor at the bottom (**Write a message...**).
2. Press **Enter** to send. **Shift + Enter** adds a line break.
3. To format, use the bar above the editor or the keyboard.



The editor with the formatting bar on top and the tools below.

Tool	What it is for
Bold, italic, strikethrough	Highlight text (**Ctrl + B**, **Ctrl + I**).
Link	Turn text into a link.
Lists	Bulleted or numbered list.
Code and quote	Inline or block code; quote a text.
Paperclip, microphone, emoji, GIF	Attach, record a voice note, insert emojis or a GIF (chapter 7).
More	Create a poll (chapter 10) or schedule the message (chapter 11).
AI	Write or improve the message with AI (chapter 24).

TIP

If you leave a message half-written, Omnifox keeps it as a draft in that conversation and the list reminds you.

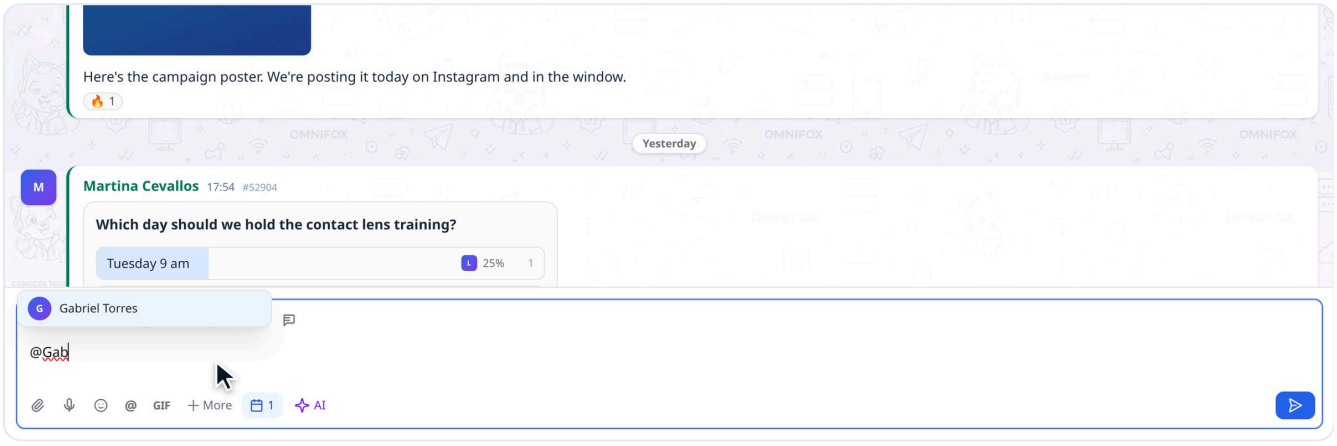
06

CHAPTER 6

Mentions: @person and @everyone

Get one person's attention, or the whole space's.

1. Type **@** in the editor.
2. Pick the person from the list (keep typing their name to filter).
3. Send: their name is highlighted and they get a notification, even if they set that space to **Mentions only**.



Typing @ shows the list of people.

With **@everyone** you notify the whole space at once.

> **HEADS UP**
> Use @everyone carefully, only for what really matters to the whole team.

07

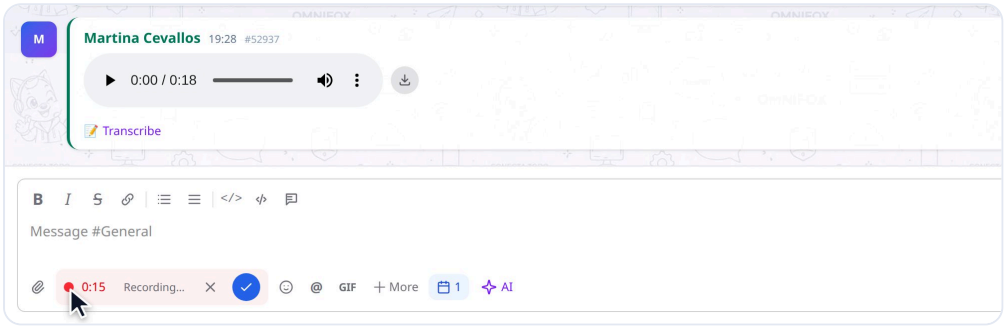
CHAPTER 7

Files, images, voice notes and GIFs

Share whatever you need: photos, documents, audio and a bit of fun.

Voice notes

1. Tap the editor **microphone** and talk.
2. When you finish, tap the check mark to send it.
3. Whoever gets it can play it or transcribe it to text in one click.



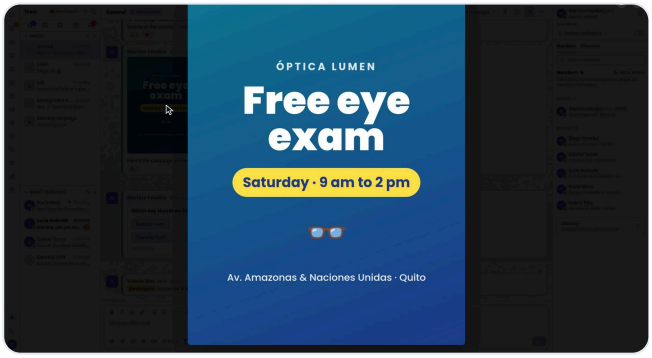
Recording a voice note.

Files and images

1. Tap the **paperclip** and pick files of any kind: photos, PDFs, spreadsheets. You can also paste them into the editor.
2. Before sending, add a text to go with them if you like.
3. Send. Images open full size with a click.



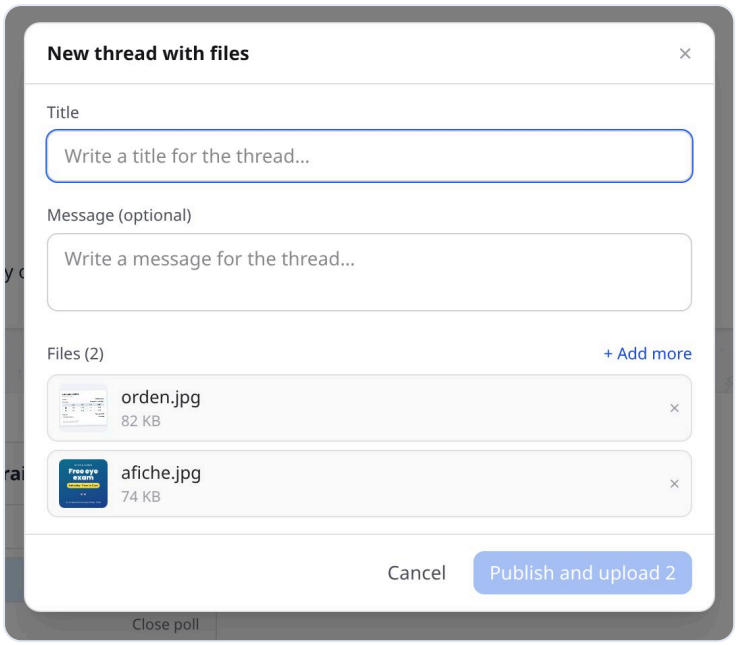
A file ready to send.



An image opened full size.

Dragging files: new thread with files

If you drag files into the chat, Omnifox offers to create a thread with a title (**New thread with files**), so they stay organized in one place.



New thread with files, when you drag files into the chat.

GIF

Tap **GIF**, search and pick one to send it.

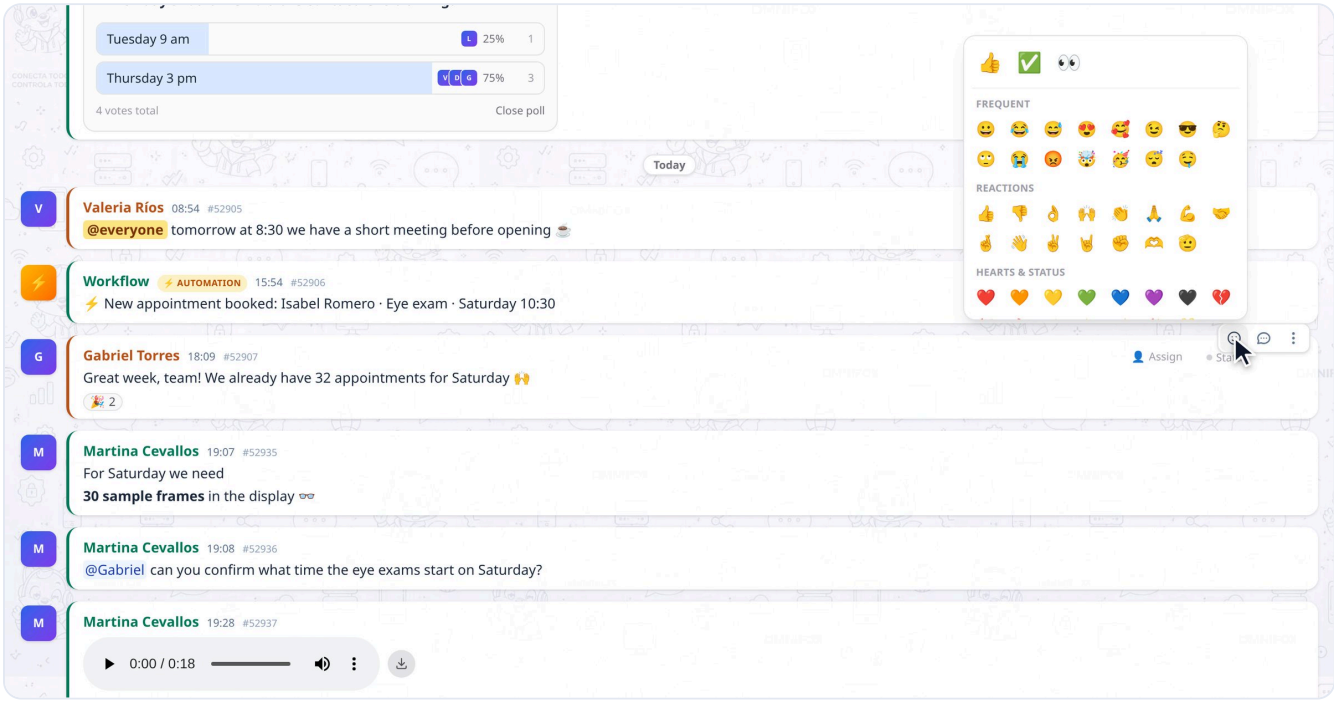
08

CHAPTER 8

Reactions, editing and deleting

Reply with an emoji and fix what you wrote.

1. Hover over a message and tap the smiley.
2. Pick one of the quick reactions on top or search for another emoji.
3. Hover over a reaction to see who reacted.

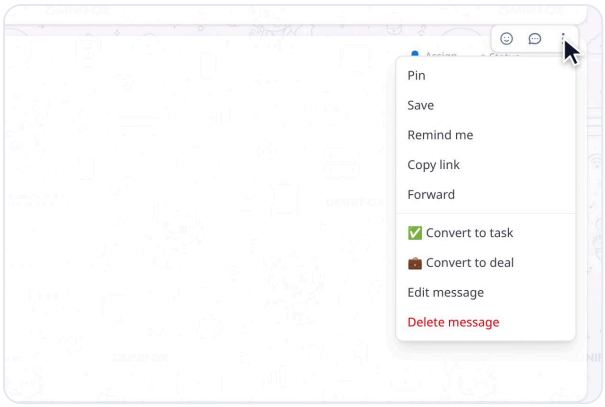


Quick reactions and the emoji picker.

Edit and delete

On your own messages, the three-dot menu lets you **Edit** the text (it gets the **(edited)** mark). If the message has a file, you can also add or change the text that goes with it. **Delete** removes it after you confirm.

> **NOTE**
>
> The account admin can delete any message for moderation.



The menu of your own message.

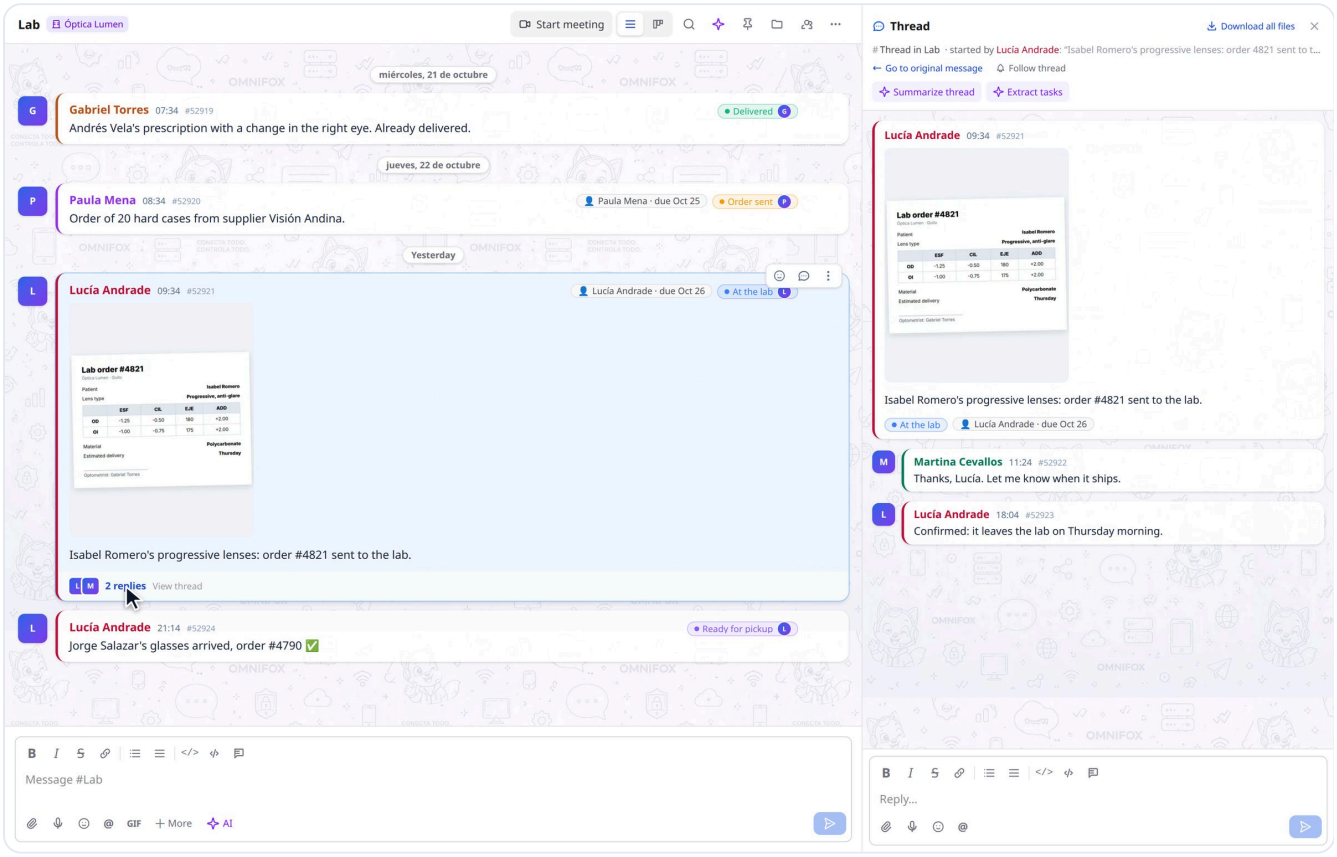
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CHAPTER 9

Threads and Your threads

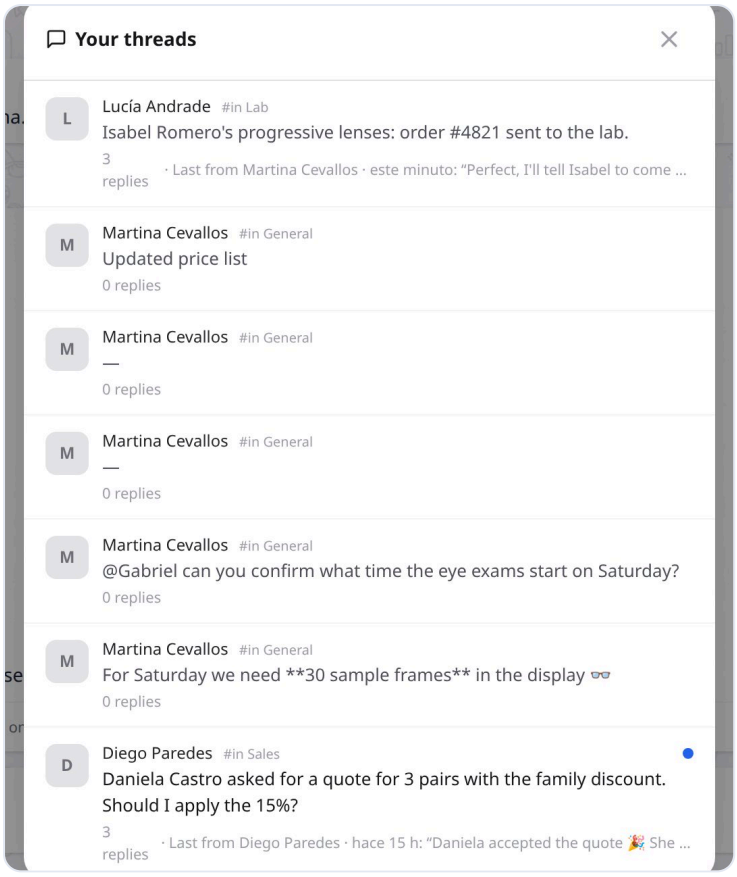
Talk about one topic without flooding the space.

1. Hover over the message and tap **Reply**, or click the message.
2. The thread opens on the right. Write your reply and send it.
3. Below the original message you see the replies and who took part.



A thread open on the right.

When you reply in a thread you follow it automatically. You can also follow one without writing, with **Follow thread**. All the threads you follow are in **Your threads**, with the ones that have new replies marked as unread.



Your threads.

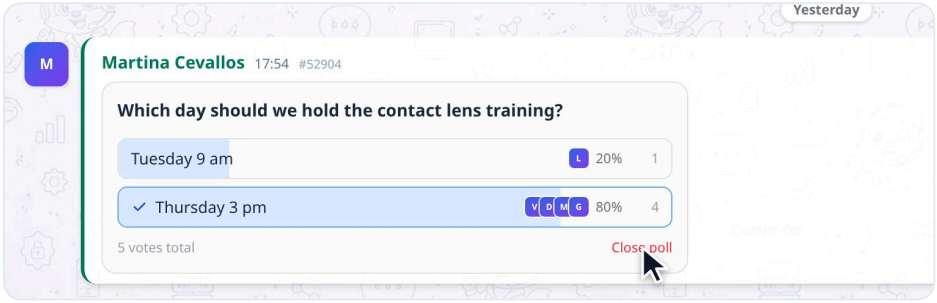
10

CHAPTER 10

Polls

Decide something together in a minute.

1. In the editor, tap **More** → **Create poll**.
2. Type the question and the options.
3. If you like, allow multiple answers or mark it as an **Anonymous poll**.
4. Tap **Create poll**. Everyone votes with one click and the percentages update live.



A poll with live votes.

Whoever created the poll can tap **Close poll** to lock in the **Final results**.

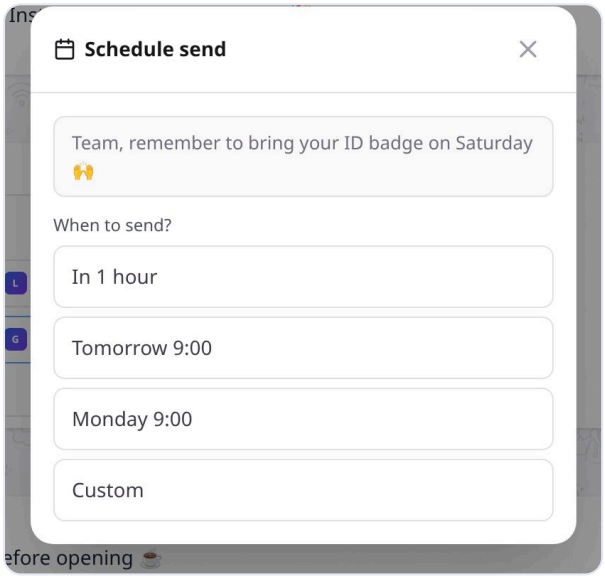
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CHAPTER 11

Scheduled messages

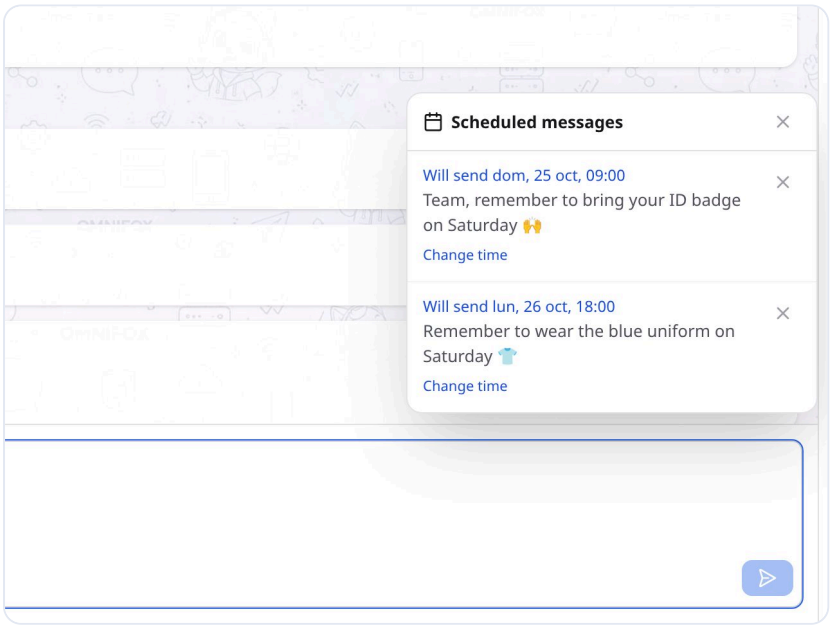
Write it now, send it when it suits.

1. Write the message.
2. Tap **More** → **Schedule send**.
3. Choose when: in an hour, tomorrow at 9, on Monday or any date and time you want.



Schedule send.

The clock next to the editor opens that conversation's **Scheduled messages**: you can change the time or cancel them. At the set time, the message is posted under your name.



The conversation's scheduled messages.

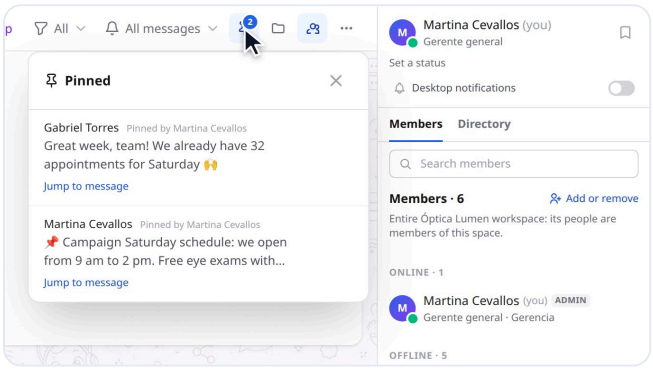
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CHAPTER 12

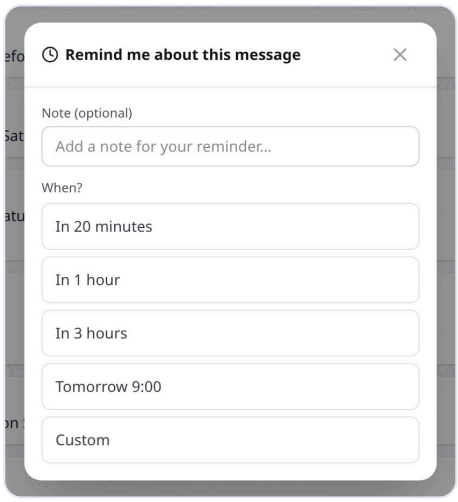
Pin, save and reminders

So what matters doesn't get lost among the messages.

Option in the ··· menu	What it does	Where you find it
Pin	Keeps the message in view for everyone in the space. Perfect for schedules, rules or details people check often.	The **Pinned** button in the header.
Save	Saves it just for you.	**Saved**, in the shortcuts.
Remind me	Reminds you about that message in 20 minutes, 1 hour, 3 hours, tomorrow at 9:00 or whenever you choose, with an optional note.	**Reminders**; the reminder arrives in your chat with yourself.



The space's pinned messages.



Remind me about this message.

13

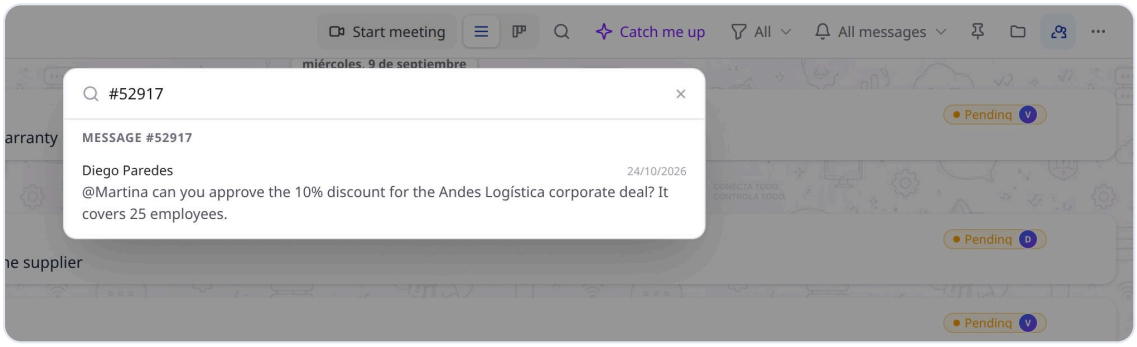
CHAPTER 13

Message number, links and forwarding

Share an exact message or take it to another conversation.

Every message has its number, with a hash sign in front (for example, **#128**). Tap it to copy the direct link to the message and paste it anywhere. The menu also has **Copy link** and **Copy text**.

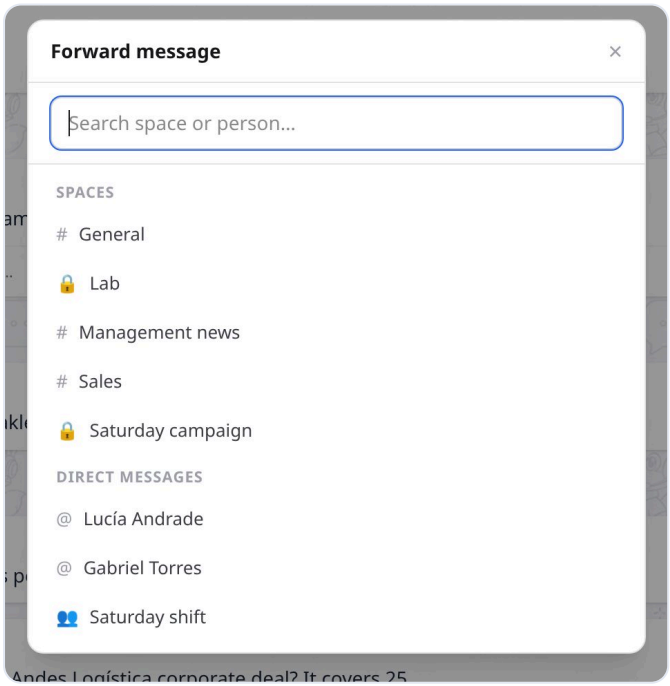
1. To go to a message by its number, type the hash sign and the number in search (**#128**).
2. Tap the result: Team opens the conversation right at that message.



Finding a message by its number.

Forward

With **Forward** you send a message to another space or person; it shows where it came from (**↪ Forwarded from #space**).



Forward message.

14

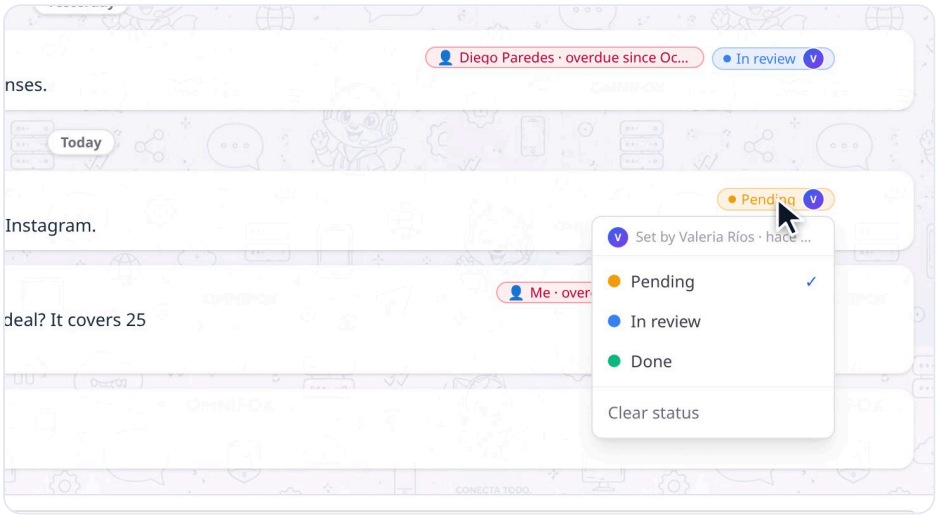
CHAPTER 14

Message statuses

What turns Team into a work tool: every message can carry a status.

Each space has its own statuses, for example **Pending**, **In review** and **Done**, and each message can carry one.

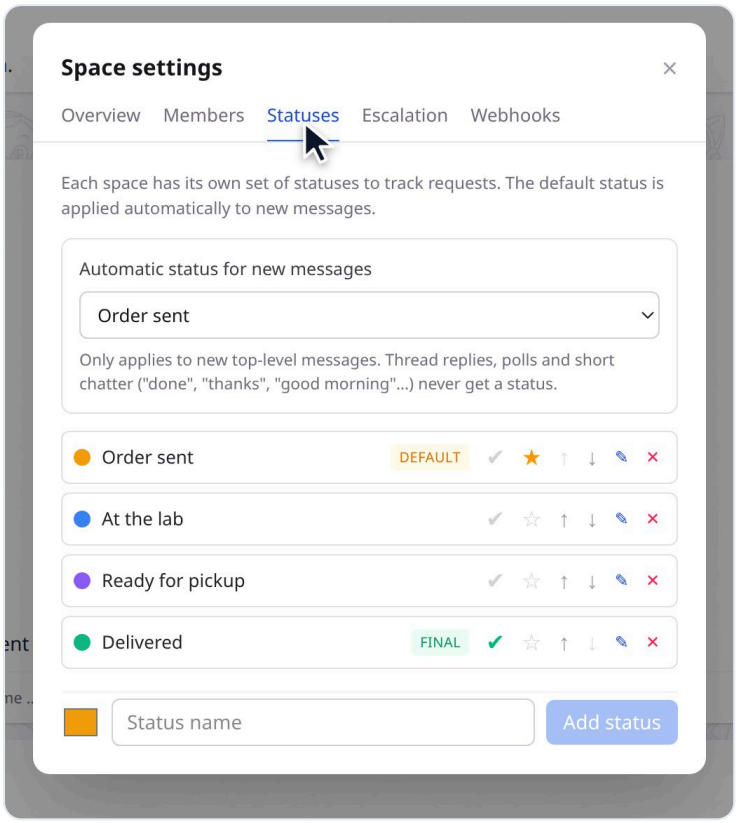
1. Tap the message's status label (or **Status** if it doesn't have one yet).
2. Pick another status. Team records who changed it and when.
3. With **Filter by status**, in the header, you see only the messages in one status.



Changing a message's status.

Setting up statuses

In **Manage space** → **Statuses** you create the ones you need, with their color. In the Óptica Lumen lab, for example: **Order sent**, **At the lab**, **Ready for pickup** and **Delivered**.



The lab's statuses, with the default and the final one.

Setting	What it is for
Automatic status for new messages	Added to every new message. Small talk ("ok", "thanks") gets no status.
Final	Marks the statuses that mean "finished": those messages drop out of the pending list.
Archive old pending	Clears the status of piled-up pending items in one go, without deleting the messages.

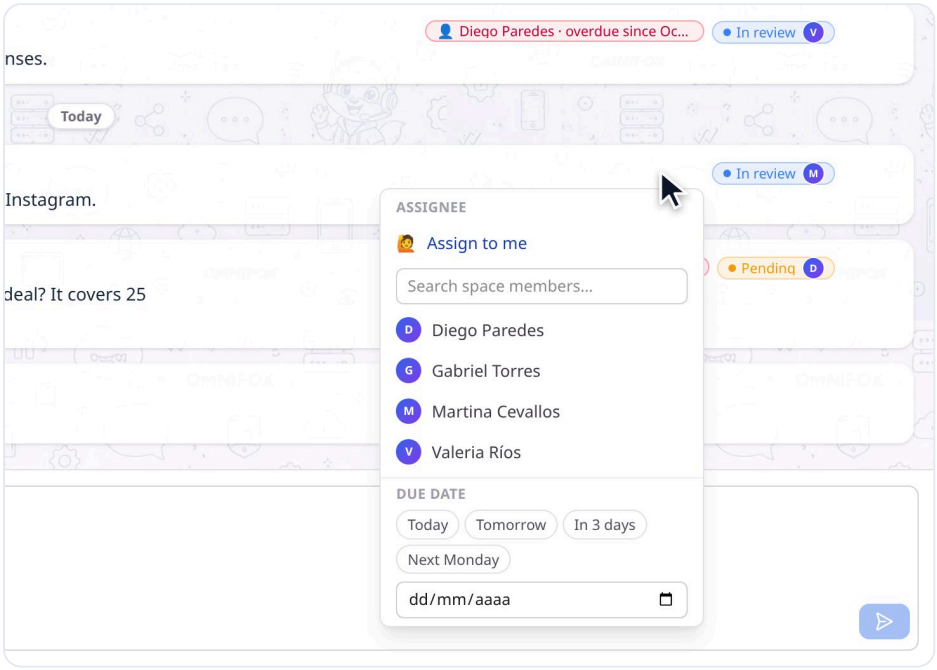
15

CHAPTER 15

Assignee and due date

Who's in charge and by when.

1. Tap the person button (👤) next to the message status.
2. Choose the assignee, or **Assign to me**.
3. Choose the due date: **Today**, **Tomorrow**, **In 3 days**, **Next Monday** or a date on the calendar.



Choosing the assignee and due date.

The label shows who has it and when it's due (**due ...**); if it's overdue, it turns red. The assignee gets a notification.

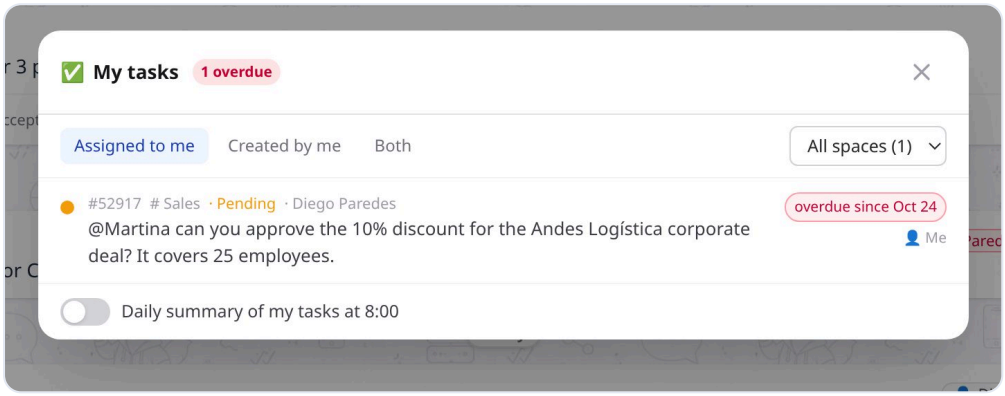
16

CHAPTER 16

My tasks, reminders and daily digest

Everything that's yours in one list, and reminders so nothing gets forgotten.

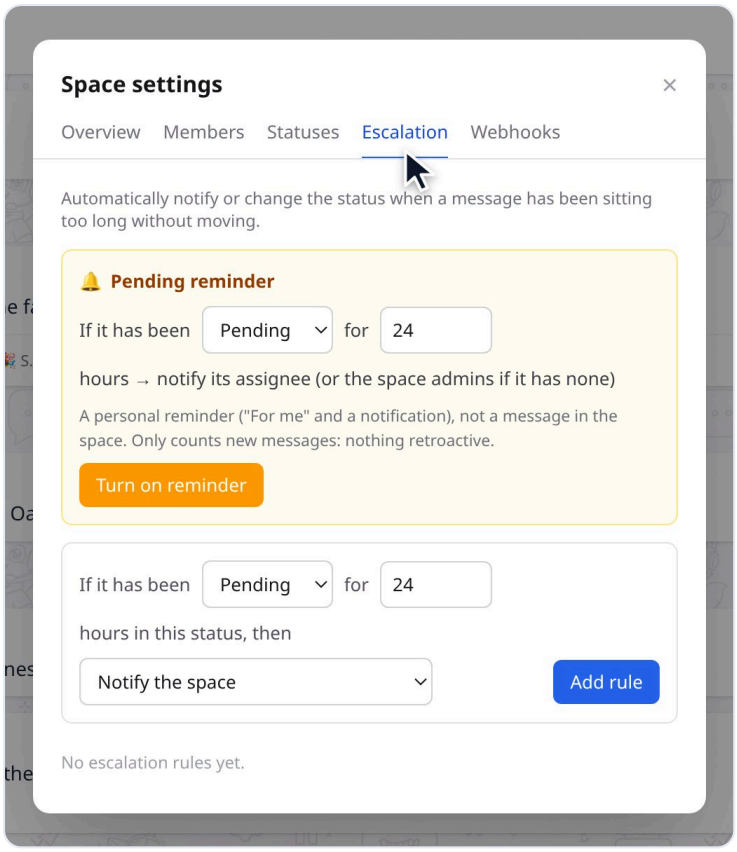
My tasks gathers everything assigned to you, across all spaces, with overdue items in red. You can see what's assigned to you, what you created or both, and filter by space.



My tasks, with the daily digest below.

Escalation: automatic reminders

1. Open **Manage space** → **Escalation**.
2. In **Pending reminder**, tap **Turn on reminder**: if a message sits in a status for a certain number of hours, Omnifox notifies its assignee or the space admins.
3. If you like, add rules that post a notice in the space or move the message to another status.



The Escalation tab.

Daily digest

In **My tasks**, turn on **Daily summary of my tasks at 8:00**: every morning at 8:00 (your local time) you get a summary of your tasks and mentions, only when something is pending.

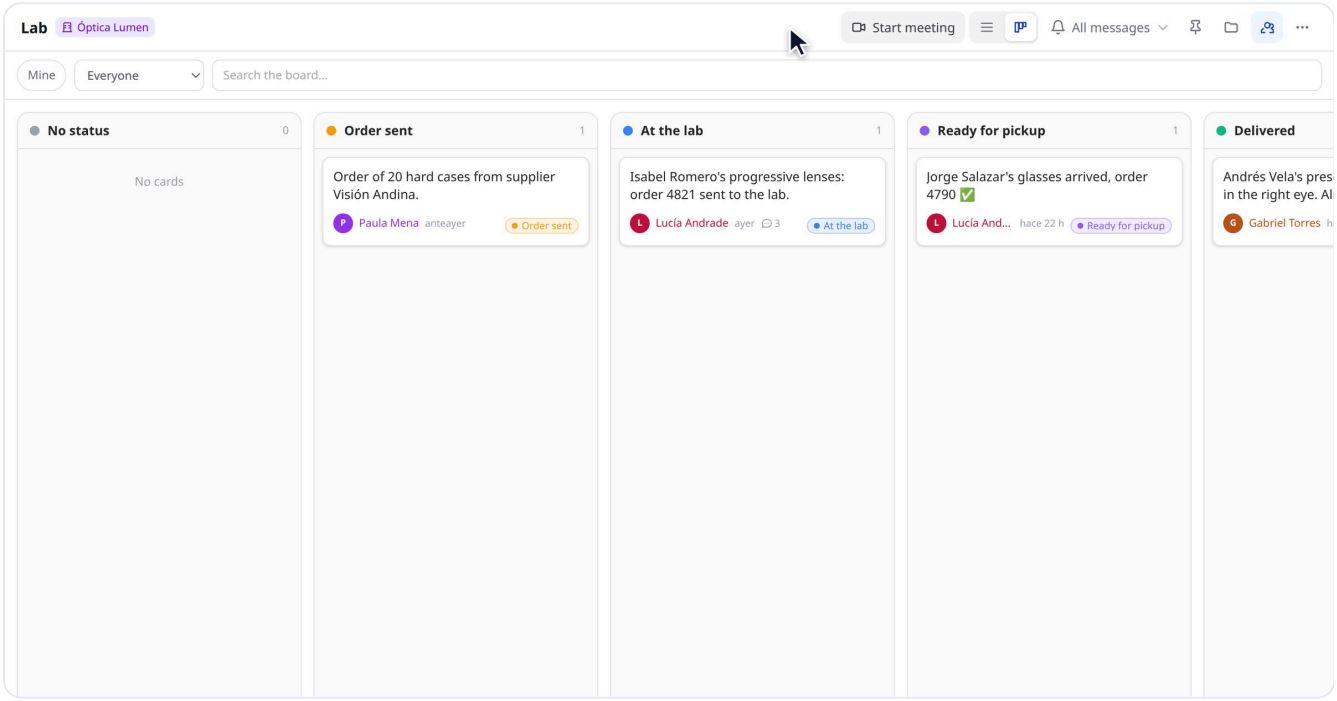
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CHAPTER 17

Board view

The space in columns, one per status.

1. In the space header, tap the board button.
2. Each column is a status and each card a message, with its author and replies.
3. Drag a card to another column to change its status.
4. At the top you filter by yours, by person or by text. The other button takes you back to the list.



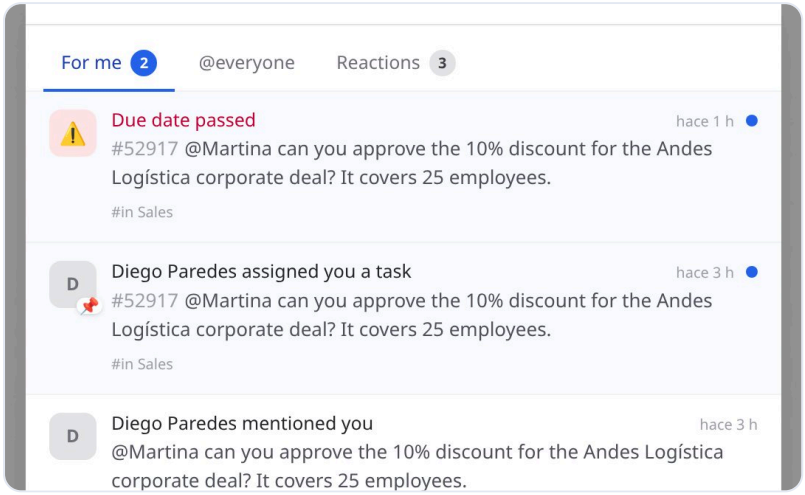
The lab in board view.

> **NOTE**
>
> The board needs statuses: if the space doesn't have any, create them first in Manage space → Statuses.

CHAPTER 18

18 Mentions and activity

Your personal inbox: what's on you.



Mentions and activity.

Tab	What it shows
For me	Direct mentions and the tasks assigned to you or that became overdue.
@everyone	Notices for the whole team.
Reactions	Who reacted to your messages.

Tap any item to jump to the message, or mark them all as read.

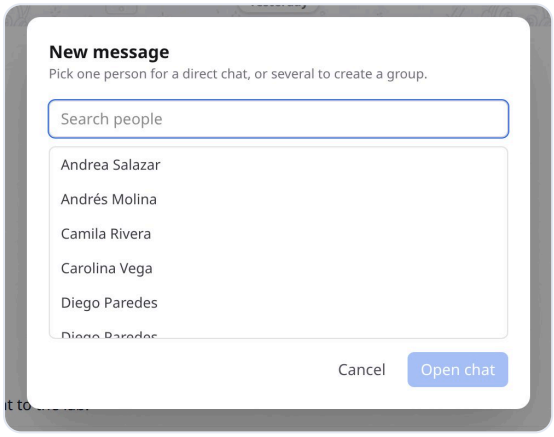
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CHAPTER 19

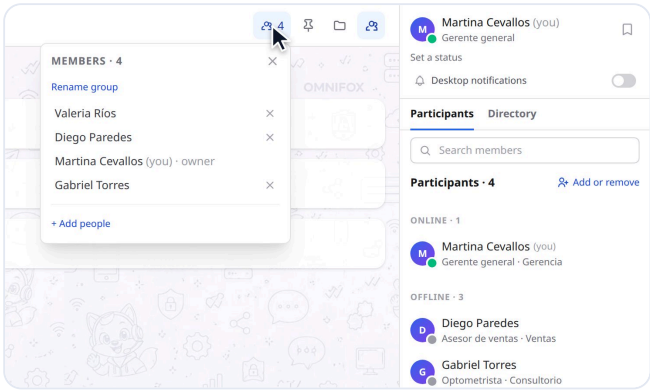
Direct messages and groups

One-to-one, group and self conversations.

1. Tap **New message** (the **+** next to **Direct messages**).
2. Pick one person for a direct chat, or several to create a group (with a name, if you like).
3. Open the chat and write.



New message.



A group and its members.

Direct messages work just like spaces: formatting, files, reactions and threads. In a group you see and manage its members. And in your chat with yourself (**You**, your notes) you keep notes, links and drafts; that's also where your reminders arrive.

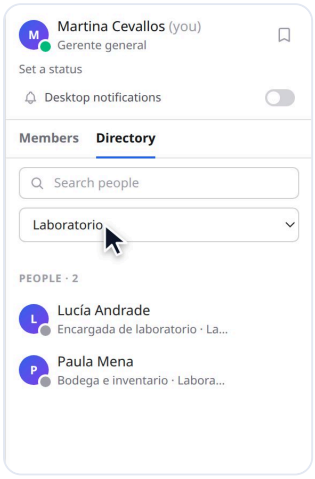
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CHAPTER 20

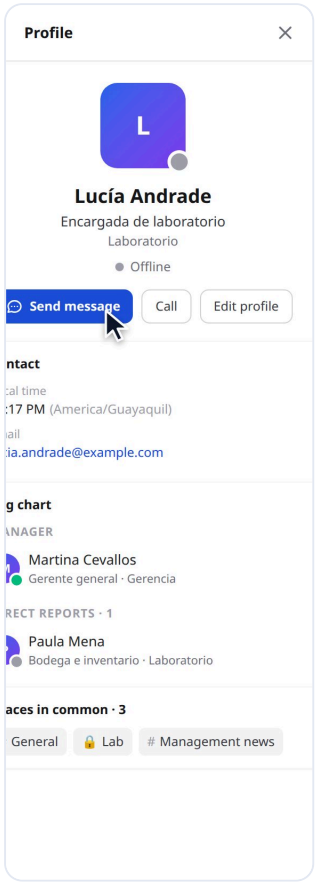
People, directory and profiles

Who's who in your organization and what they're up to.

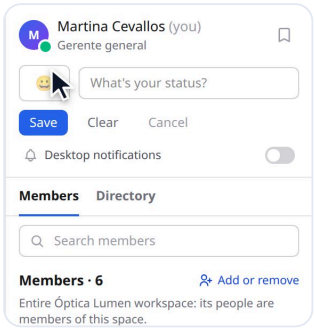
In the right panel, **Members** shows who's in the space and who's online. The **Directory** has your whole organization with job titles, and you can filter by area.



The directory, filtered by area.



A person's profile.



Set a status.

Tap a name to see their profile: local time, contact details, manager, direct reports and shared spaces. From there you message them (**Send message**) or call them (**Call**).

Your status

At the top, on your card, tap **Set a status** and pick one with an emoji, like "With a patient" or "In a meeting", so the team knows what you're up to.

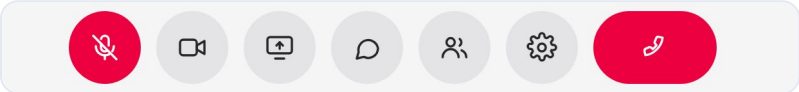
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CHAPTER 21

Calls and meetings

Talk live with your team from the browser, nothing to install.

1. Tap the phone (**Call**) next to a person or in the header of the direct chat.
2. The call room opens, with microphone, camera and screen sharing.
3. The other person's call rings so they can join.



The call room controls: microphone, camera, screen, chat, participants, settings and hang up.

In a space, **Start meeting** opens a video call with all its members. While it's on, the button changes to **Join meeting**.

> **NOTE**
> Video calls depend on your plan.

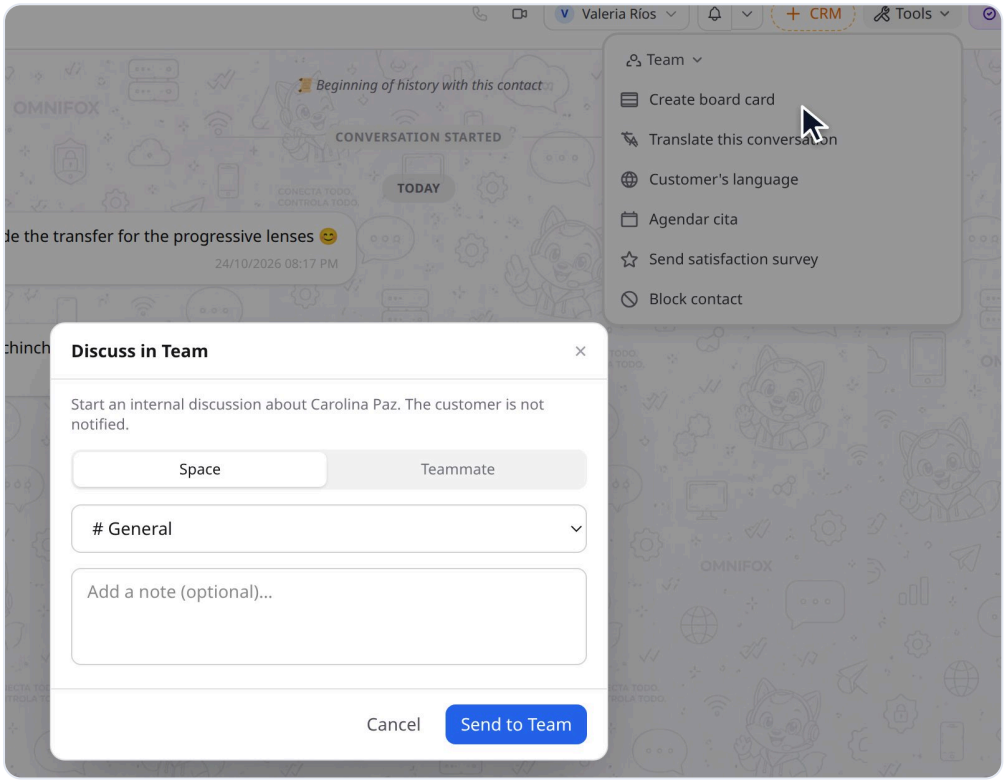
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CHAPTER 22

From the inbox: the conversation card

Coordinate a customer's case with your team without writing to the customer.

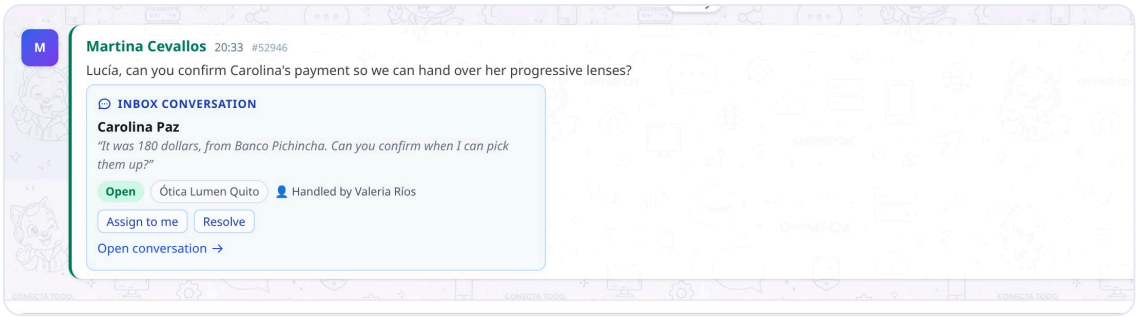
1. In the inbox, open the customer's chat.
2. Tap **Tools** → **Team** → **Discuss in Team**.
3. Pick the space or person, add a note (optional) and tap **Send to Team**.



Discuss in Team, from an inbox chat.

The conversation card appears in Team, live: its status and who's handling it. From the card:

Button	What it does
Assign to me	You take the customer's conversation.
Resolve	You mark it as resolved without leaving Team.
Open conversation	Takes you straight to the chat in the inbox.

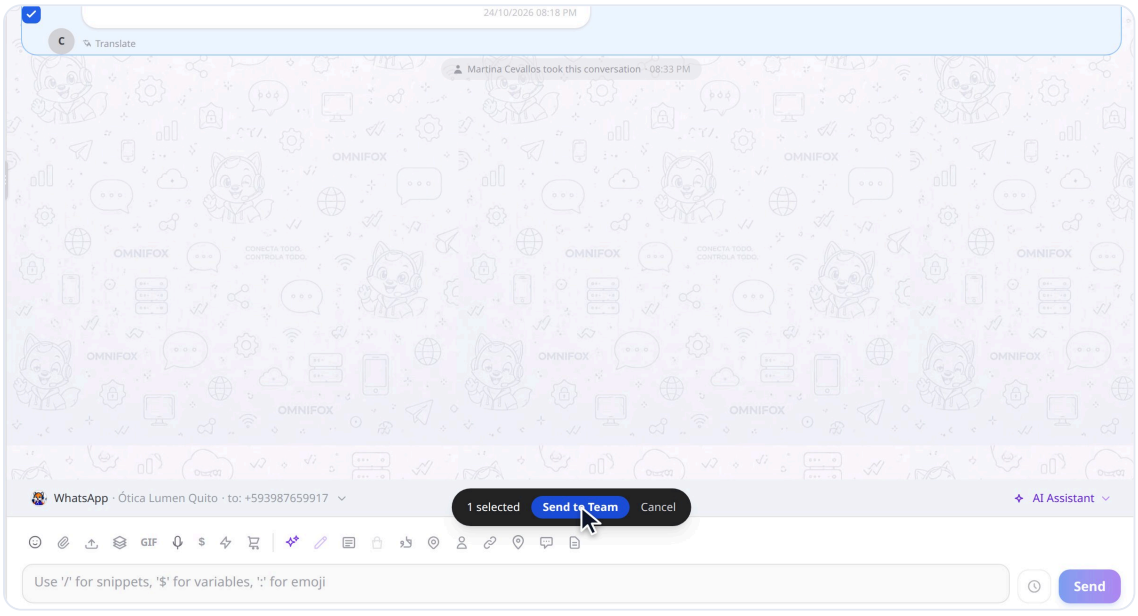


The conversation card inside the space.

Send customer messages to Team

In the inbox, **Select and send to Team** lets you check several of the customer's messages (for example, a payment receipt) and send them to a space or person: they arrive together in a thread, with their files, for the team to review.

> **NOTE**
> The customer receives nothing: everything done in Team is internal.



Selecting the customer's messages and sending them to Team.

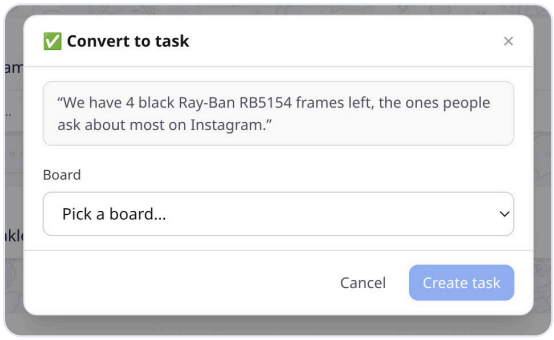
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CHAPTER 23

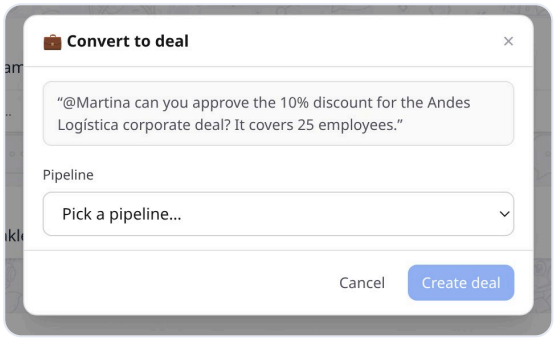
Turn into a task or a deal

A message can become concrete work in Projects or in the CRM.

1. Open the message's three-dot menu.
2. Choose **Convert to task**, the Projects board and the group.
3. The message gets the **Task created** mark.



Convert to task.



Convert to deal.

If it's a sales opportunity, **Convert to deal** takes it to the CRM pipeline, at the stage you choose.

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CHAPTER 24

Artificial intelligence in Team

Less reading and better-written messages.

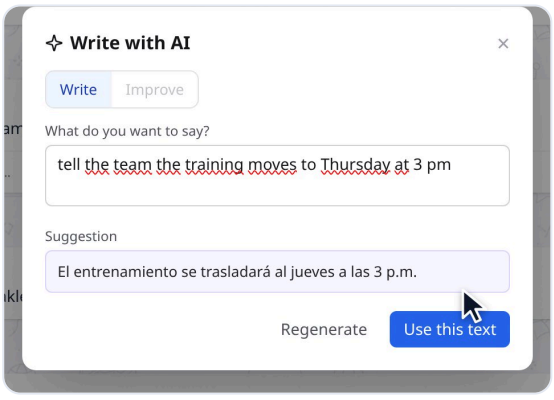
Feature	Where	What it does
Catch me up	Space header	Sums up what matters in the space in seconds.
Summarize thread	Thread header	Summarizes a long thread.
Extract tasks	Thread header	Finds the to-dos in the thread with their owner (**Detected tasks**).
Write or improve with AI	Editor **AI** button	**Write** a message from an idea, or **Improve** the one you already wrote: shorter, more formal, whatever you ask.
Transcribe voice notes	Voice note	Turns the audio into text.

NOTE

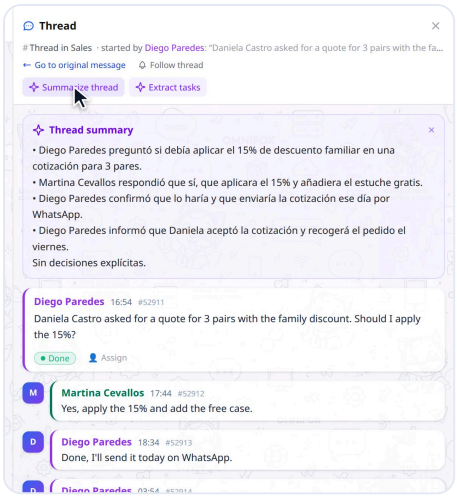
Each use is a click of yours and uses AI credits from your account. The admin can turn off Team AI or choose which features to use.



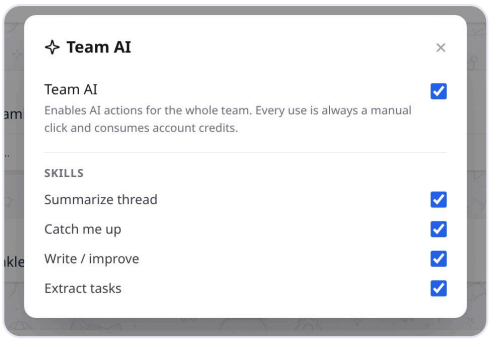
Catch me up: the space's summary.



Write with AI.



Summarize thread.



Team AI: the admin chooses which features to use.

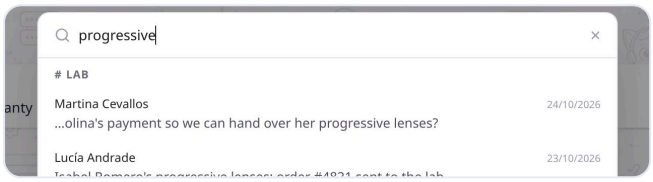
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CHAPTER 25

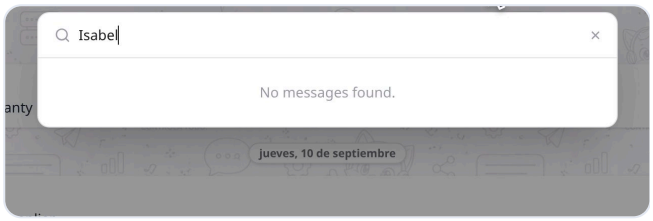
Search messages

Find any message in seconds.

1. Tap the magnifying glass above the list (**Search messages**) and type: you search all your spaces and direct messages at once.
2. To search only inside the open space, use the magnifying glass in the header.
3. Click a result to go to the message.



Search all your spaces and direct messages.



Search only the open space.

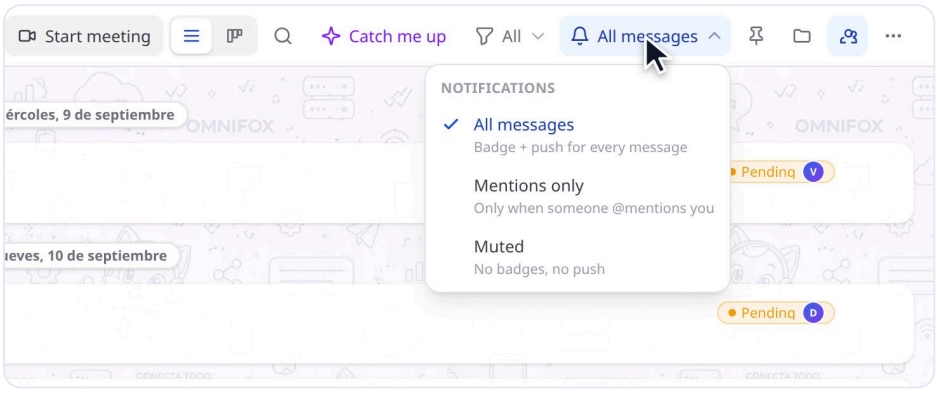
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CHAPTER 26

Notifications and muting

You decide how much each space notifies you.

Level	What you get
All messages	Every new message.
Mentions only	Only when you are mentioned.
Muted	Nothing; the space stays quiet.

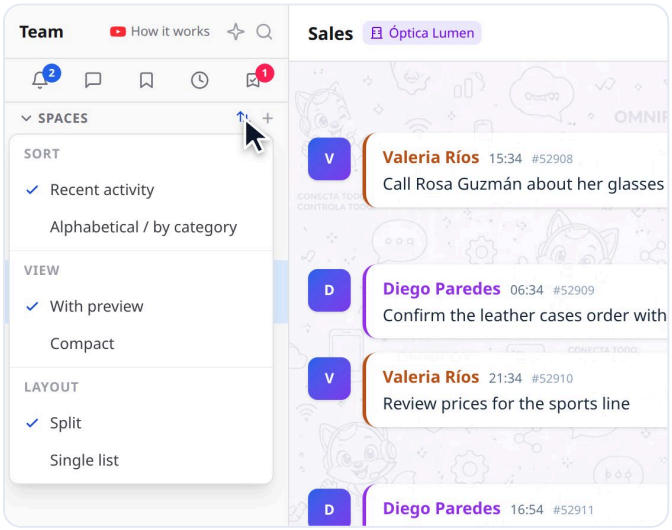


The space's notifications.

Change it in the space header or in the row menu. Turn on **Desktop notifications** from your card to find out even when you're in another tab; on your phone, the Omnifox app sends you push notifications.

Sorting the list

With **Sort** you choose how your list looks: by **Recent activity** or **Alphabetical / by category**, split into spaces and direct messages or one single list, with preview or compact.



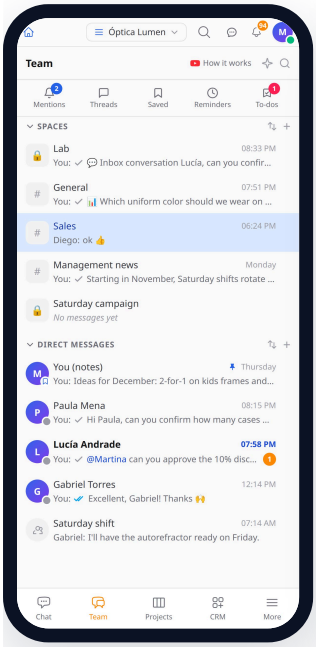
Sorting the list.

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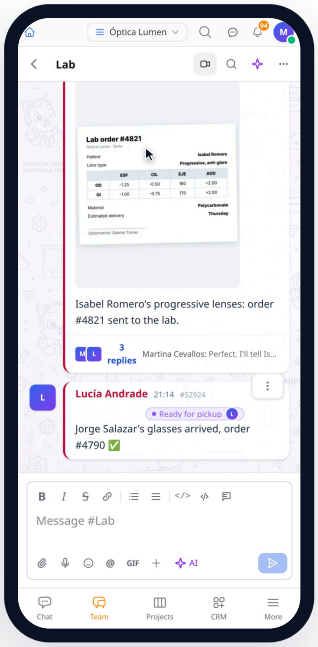
CHAPTER 27

Team on your phone

Team goes with you, in the browser or in the app.



The list on a phone.



An open space.

On a phone the list fills the screen; tapping a conversation opens the chat. Threads, profiles and people open full screen. In the app, tap a message's smiley to react or edit it, and long-press outside the text to see the actions.

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CHAPTER 28

Keyboard shortcuts

Work faster with the keyboard.

Key	Action
Enter	Send the message
Shift + Enter	Line break
Ctrl + B · **Ctrl + I**	Bold · italic
@	Mention someone
When editing: **Enter** · **Esc**	Save · cancel
Esc	Close the open thread or profile

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CHAPTER 29

Glossary and FAQ

Glossary

Term	What it is
Space	A team conversation room, public or private, for the whole organization or one workspace.
Direct message	A chat with one person or a small group.
Thread	Replies to a message, opened on the right, without flooding the space.
Status	A follow-up label on a message (Pending, In review, Done...), specific to each space.
Final status	A status that means "finished": the message drops out of the pending list.
Assignee and due date	Who is in charge of a message and by when.
Escalation	Automatic reminders when a task sits in a status for too long.
Announcement space	Only admins post; everyone else reads and reacts.
Guest	A person outside your organization who only sees one private space.

Frequently asked questions

Do customers see what I write in Team?

No. Team is internal only. Neither **Discuss in Team** nor **Send to Team** notifies the customer.

Why can't I create a space?

Only organization admins can create them. Ask your admin.

Why can't I post in a space?

It's probably an announcement space: only its admins post. You can read and react.

Who sees a private space?

Only its members. Its admins add or remove people in **Manage space** → **Members**.

Where do I see what I have to do?

In **My tasks**, and your mentions in **Mentions & activity** → **For me**.

Too many old pending items. How do I clean up?

In **Manage space** → **Statuses**, tap **Archive old pending**: it clears their status without deleting the messages.

The board is empty.

The board needs statuses in the space. Create them in **Manage space** → **Statuses**.

How do I stop getting notifications from a space?

Set it to **Mentions only** or **Muted** from the header or the row menu (chapter 26).

Can I use Team on my phone?

Yes, in your phone's browser or in the Omnifox app (chapter 27).

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**.