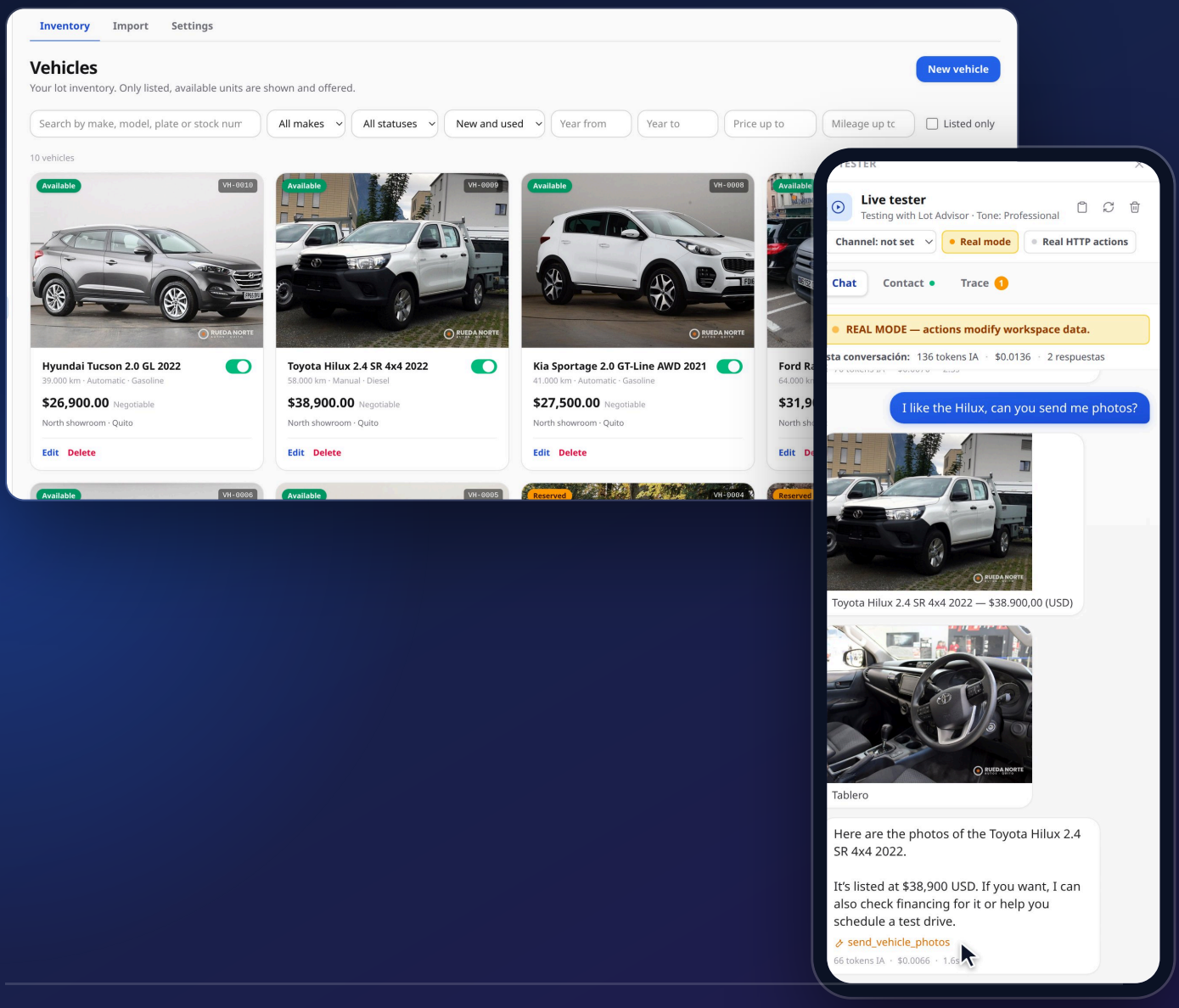
Omnifox

MODULE MANUAL

Vehicles

Your dealership lot inside Omnifox: vehicles with photos protected by your watermark, financing with your rate, test drives on your calendar, quotes that open a CRM deal, and an AI agent that serves customers on WhatsApp, Instagram and your website.



CONTENTS

Table of contents

01 What the Vehicles module is and who it is for 3

02 Turn on the module 5

03 Settings: general and test drives 6

04 Financing and the payment simulator 8

05 Numbering and CRM deals 9

06 Watermark on photos 11

07 The inventory 12

08 Add a vehicle 13

09 Day to day: holds, sales and import 16

10 Quote a vehicle 18

11 Set up the AI agent 21

12 FAQ and current limits 27

How to read this manual

The screenshots are real Omnifox screens with a sample lot, **Rueda Norte Autos**, in Quito: ten vehicles including pickups, SUVs and city cars, new and used. 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.

01

CHAPTER 1

What the Vehicles module is and who it is for

A Catalog module for dealerships, used car lots and any business that sells unique vehicles, each with its own plate, mileage and price.

A car is not a product with stock: every vehicle is unique. The Vehicles module keeps your lot one vehicle at a time, with its spec sheet, condition, photos and price, and that same information is used by your team in the inbox, by the quote editor and by the AI agent when a customer writes “I’m looking for a 4×4 pickup”.

Settings
Currency, test drives, financing, CRM, watermark

→

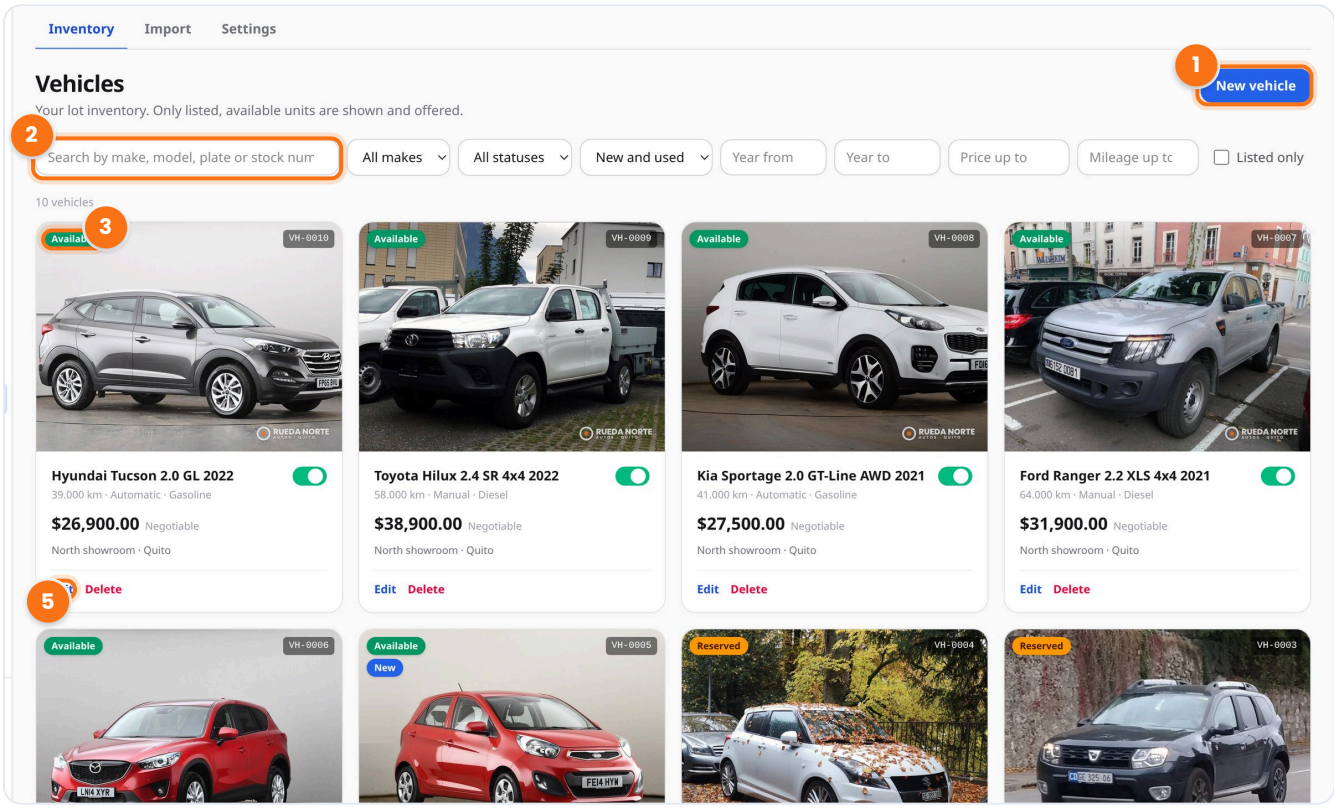
Vehicles
Spec sheet, photos and price

→

Quote
With a CRM deal

→

AI agent
Searches, sends photos, simulates and books



The sample lot inventory.

1. **New vehicle** opens the form.
2. Search and filters, in a single row.
3. The status on the photo: available, reserved or sold.
4. The switch publishes or unpublishes the vehicle.
5. **Edit** opens the full form.

Who it is for

Business	How it uses it
New and pre-owned dealership	The whole lot published, test drives on the sales team calendar and quotes with your logo.
Used car lot	Mileage, previous owners, accident history and watermarked photos so nobody copies them.
Independent seller	A few vehicles and an AI agent that answers at night and books the test drive for the next day.
Motorcycles, trucks, machinery	The same form works for any vehicle with make, model, year and plate.

WHAT IS INCLUDED

Turning the module on is free and does not change your plan. The **Schedule a test drive** AI tool is available from the entry plan.

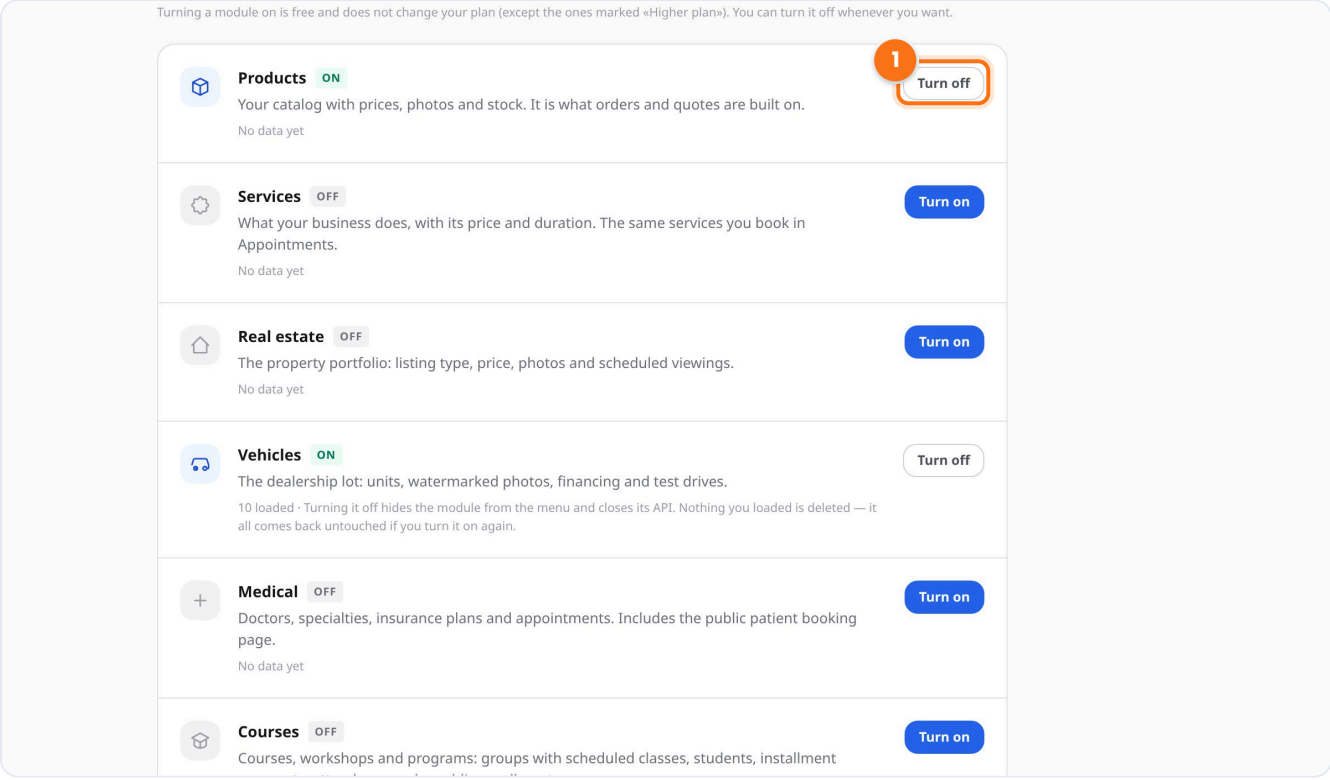
02

CHAPTER 2

Turn on the module

Vehicles starts turned off. It is turned on per workspace and turned off just as easily.

1. In the **Catalog**, open the modules screen (**Add module**).
2. Find the **Vehicles** card and click **Turn on**.
3. If you already had vehicles loaded, the card tells you how many.
4. **Vehicles** shows up in the Catalog menu, with three tabs: **Inventory**, **Import** and **Settings**.



The **Vehicles** card on the modules screen, already on.

1. **Turn off** hides it from the menu; what you loaded is not deleted.

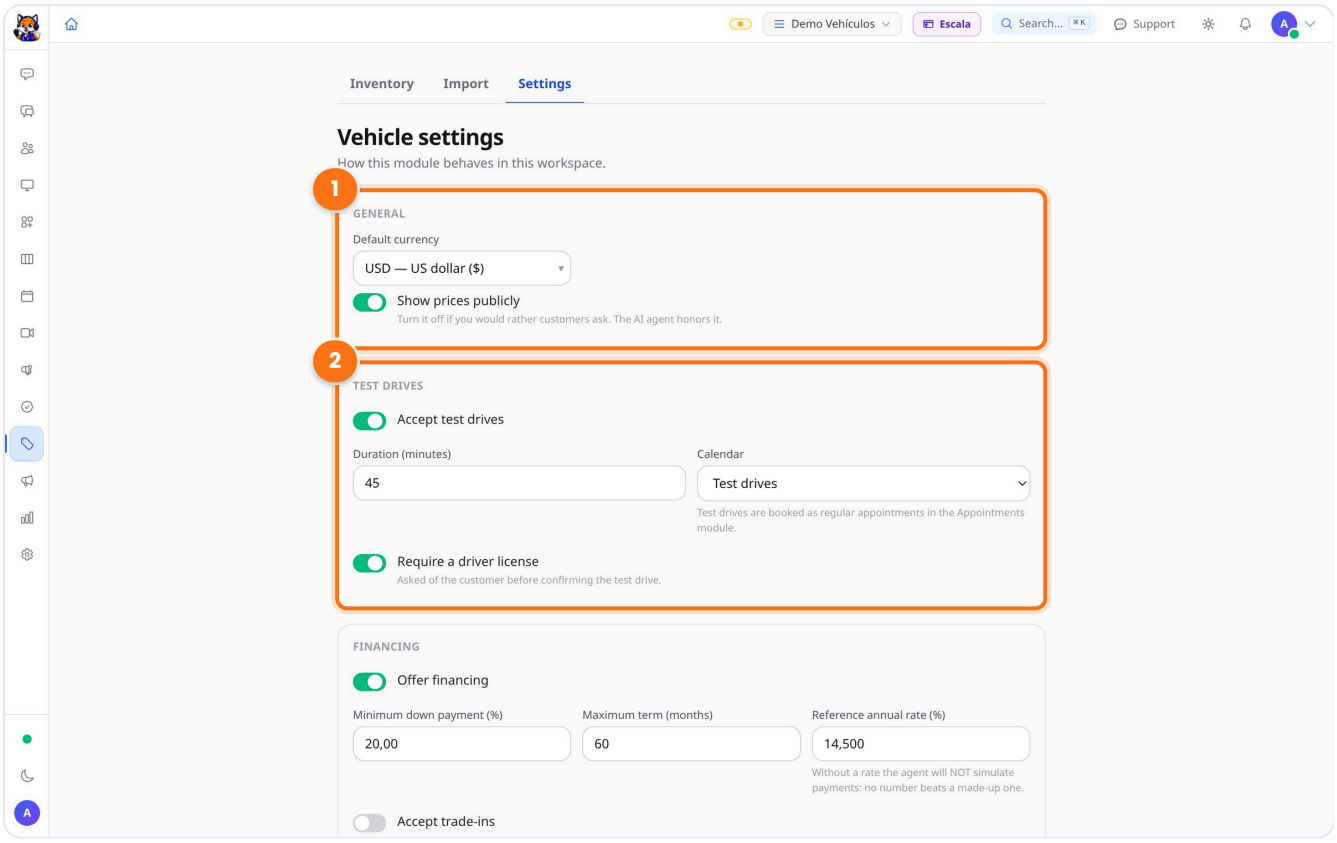
> **TIP**
>
> Turning modules on and off is up to the owner or an admin. If you have several workspaces (for example, one per branch), turn it on in each one.

03

CHAPTER 3

Settings: general and test drives

Settings define how the module behaves in your workspace. The owner or an admin saves them; the rest of the team sees them read-only.



At the top, **General**; below, **Test drives**.

1. Default currency and whether prices are published.
2. Test drives: duration, calendar and license.

Setting	What it does
Default currency	The currency each new vehicle starts with.
Show prices publicly	Off, customers have to ask for them and the AI agent won't share them either.
Accept test drives	Off, the agent doesn't offer test drives.
Duration (minutes)	How long each test drive blocks on the calendar (45 in the example).
Calendar	Where test drives are booked: a calendar with its business hours. Ours is open Monday to Friday 9:00–18:00 and Saturdays 9:00–13:00.
Require a driver license	The agent asks for the license number and won't book without it.

HEADS UP

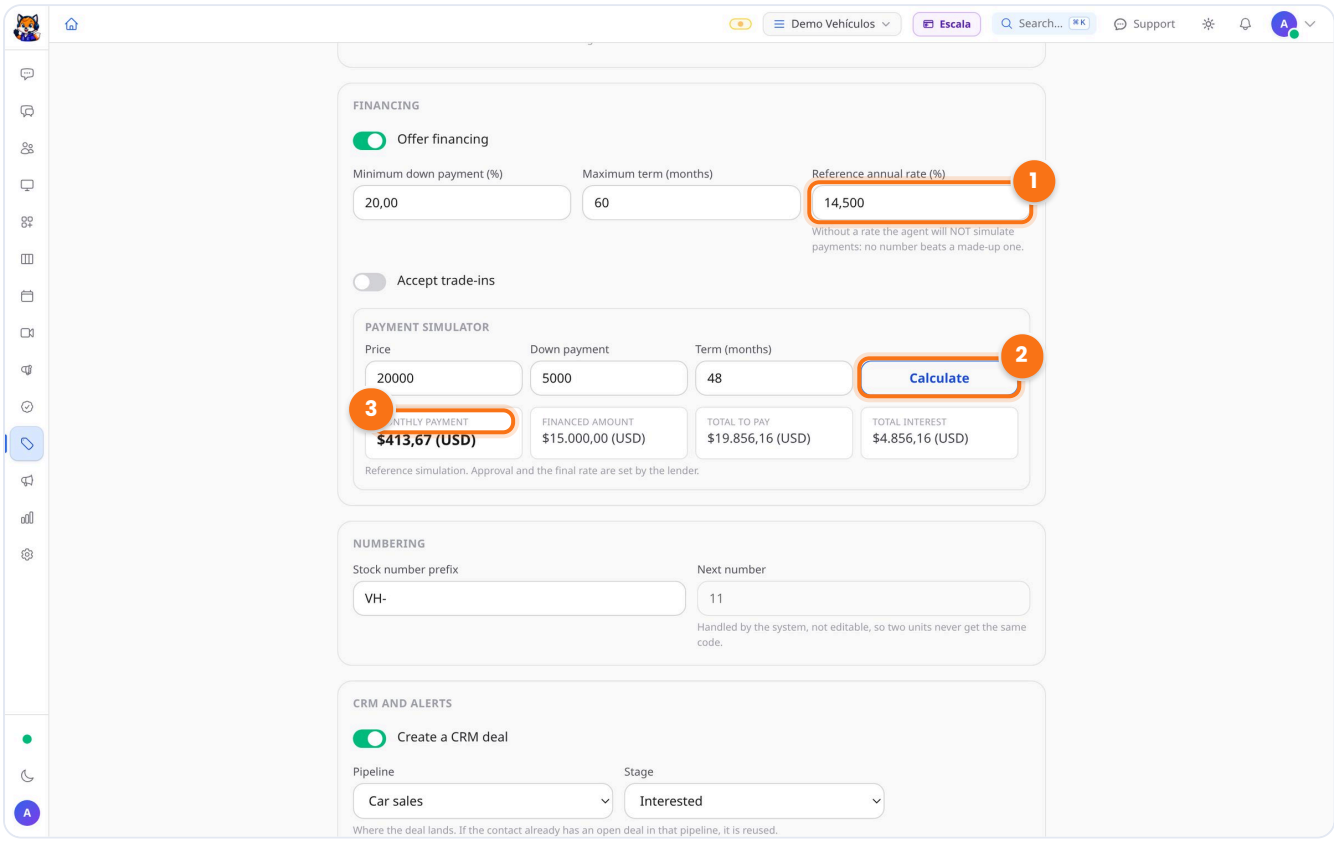
With no calendar selected, the agent doesn’t make up times: it says an advisor will arrange the test drive. If you don’t have a calendar yet, create one in **Calendar**.

04

CHAPTER 4

Financing and the payment simulator

With your minimum down payment, maximum term and rate, the system calculates the payment. The AI agent never does the math in its head.



Financing and the payment simulator.

1. **Reference annual rate**: without it, no payments are simulated.
2. **Calculate** tests the setup.
3. The result: monthly payment, amount financed, total to pay and interest.

1. In **Vehicles** → **Settings** → **Financing**, keep **Offer financing** on.
2. Type the **Minimum down payment (%)** and the **Maximum term (months)**.
3. Type the **Reference annual rate (%)**; 14.5% in the example.
4. Click **Save** at the bottom of the page.
5. Try the **Payment simulator**: price 20,000, down payment 5,000, term 48 months and **Calculate**.

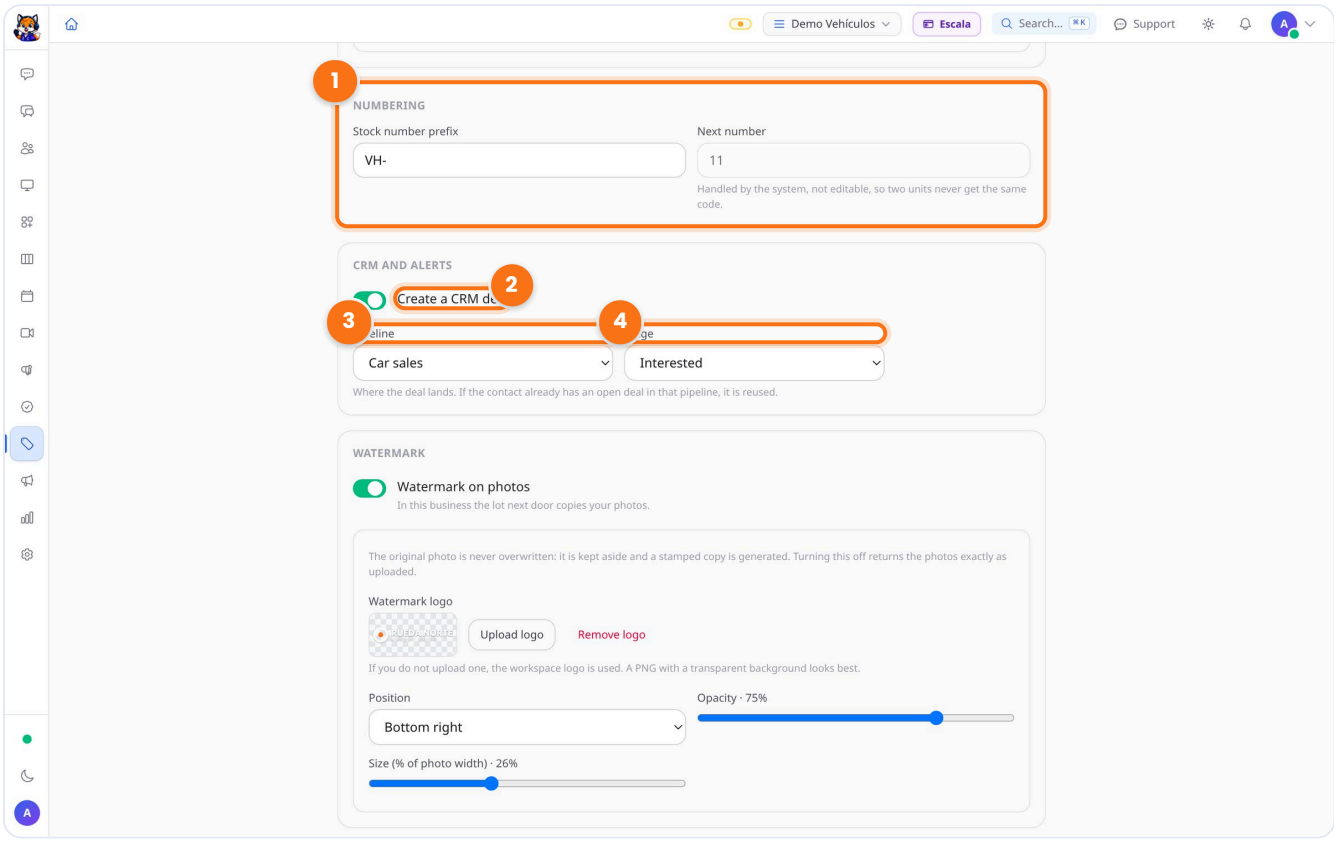
> **NOTE**
>
> With no rate loaded, the agent **won't simulate payments**: it would rather give no number than a made-up one. If the customer asks for a down payment below the minimum or a term above the maximum, the simulation tells them.

05

CHAPTER 5

Numbering and CRM deals

Each vehicle gets an internal code the system numbers on its own, and every lead can land in your CRM as a deal.



Numbering and **CRM and alerts**.

1. The code prefix; the next number is kept by the system.
2. **Create a CRM deal**.
3. The **Pipeline** where the deal lands.
4. The **Stage** it enters with.

The internal code

With the prefix **VH-**, vehicles come out as **VH-0001**, **VH-0002**... The **Next number** can't be edited by hand so two vehicles never get the same code. If you type your own code when adding a vehicle, it is kept; if you leave it empty, it is generated.

CRM deals

1. Under **CRM and alerts**, turn on **Create a CRM deal**.
2. Choose the **Pipeline** (**Car sales** in the example). If you don't choose one, the default pipeline is used.
3. Choose the **Stage** it enters with (**Interested** in the example). If you don't, the first one.
4. Click **Save**.

From then on a CRM deal is created:

When	Which deal
When you create a **quote** with a vehicle (chapter 10)	One titled with the quote number and the vehicle, with the quote total and linked to it.
When the **AI agent books a test drive** (chapter 11)	One titled with the test drive and the vehicle, with the vehicle price and linked to the conversation.

TIP

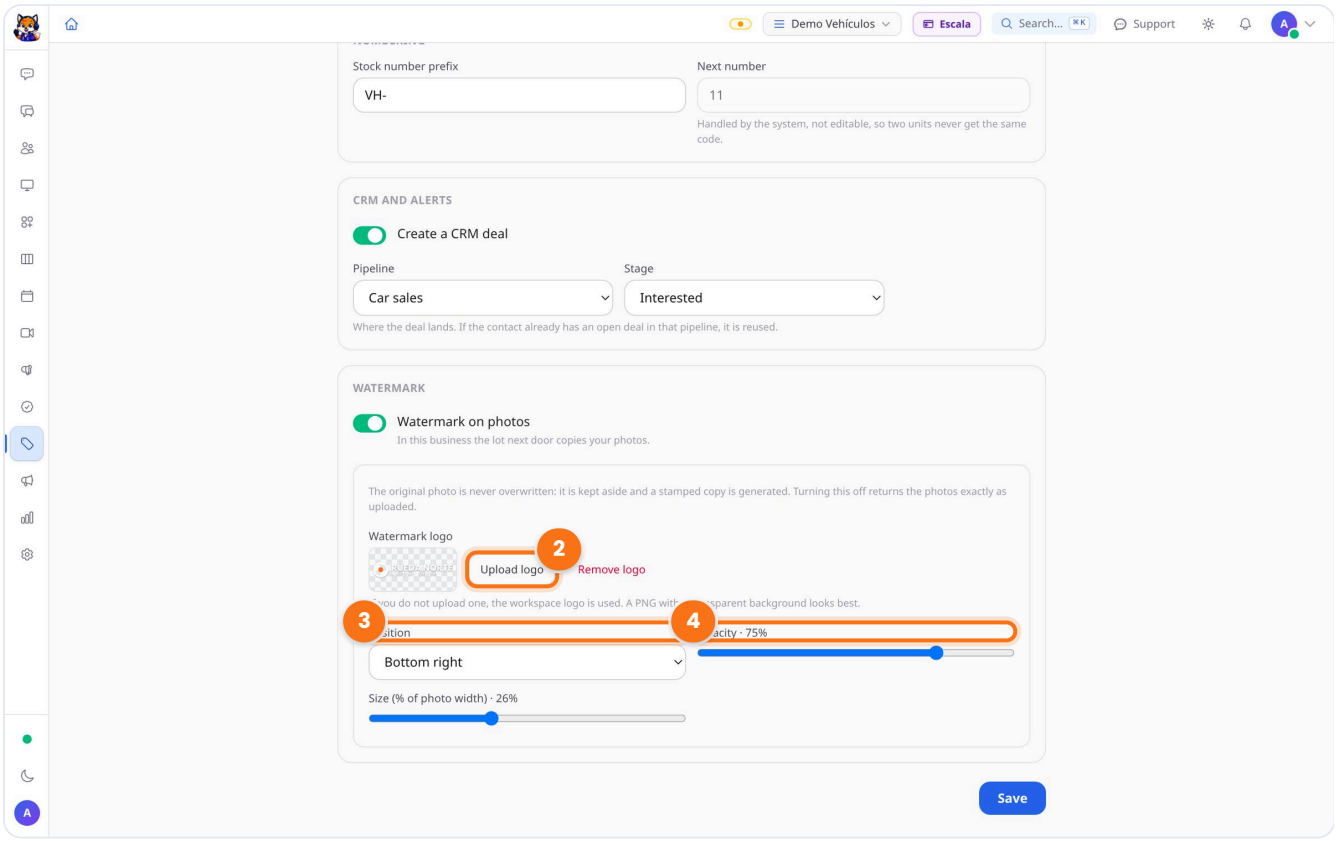
If the contact already has an **open** deal in that pipeline, it is reused and not moved: a customer in “Negotiation” who asks for another quote doesn’t go back to “Interested”. If your workspace has no pipeline, nothing is created.

06

CHAPTER 6

Watermark on photos

In this business competitors copy the photos from the lot next door. With the watermark, every photo carries your logo.



The **Watermark** section with the Rueda Norte logo.

1. Turn on **Watermark on photos**.
2. **Upload logo**: PNG with a transparent background.
3. The **Position** on the photo.
4. **Opacity** and **Size**.

1. Turn on **Watermark on photos**.
2. Click **Upload logo** and choose your business logo. No need to save first: the logo uploads right away and your other unsaved changes on the page stay.
3. Choose the **Position** (for example, bottom right), the **Opacity** and the **Size** (% of the photo width).
4. Click **Save**. Every photo in the inventory gets stamped with your logo.

NOTE

The original photo is **never overwritten**: it is kept aside and a copy with the mark is generated. If you turn the watermark off, photos look as they were uploaded. If you upload no logo, the workspace logo is used.

TIP

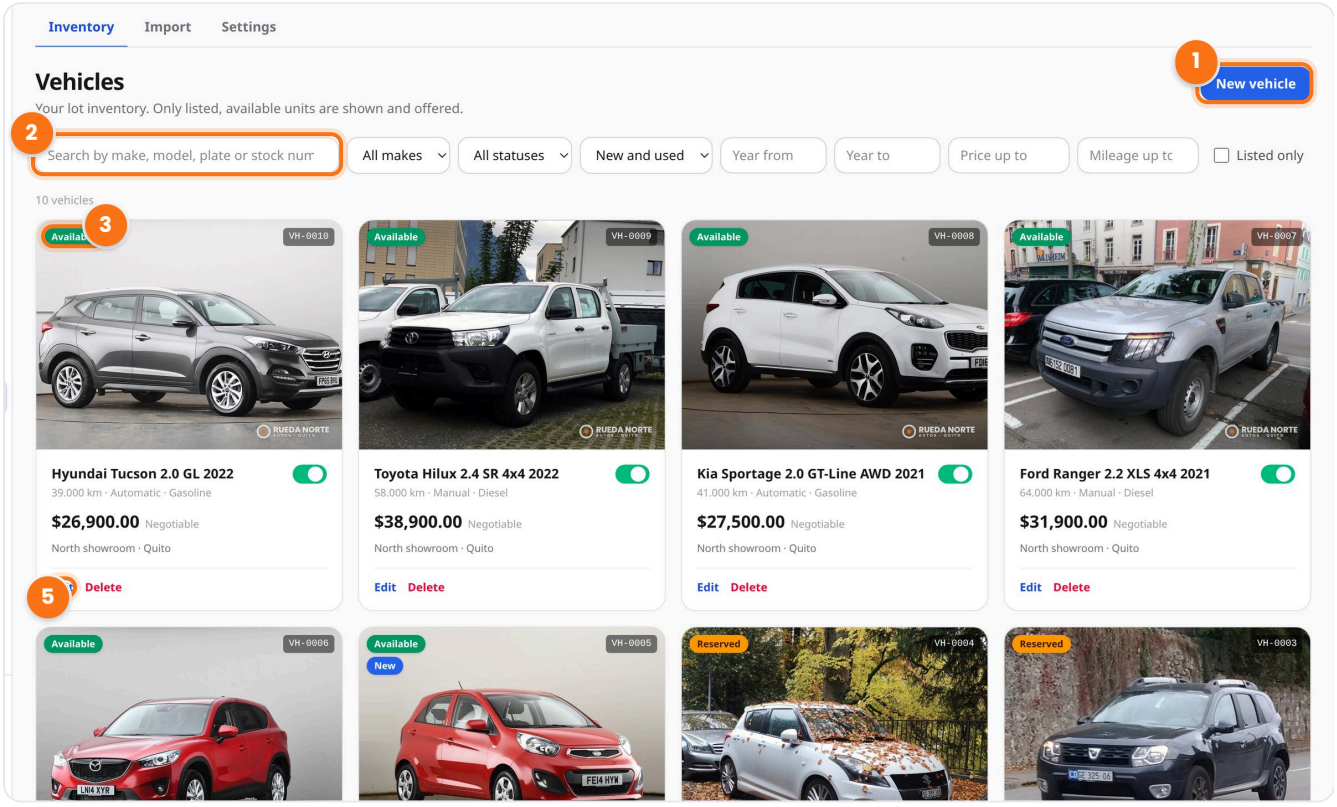
When you change the watermark, each photo's address changes too: the inventory, quotes and the agent show the new version right away, without clearing the browser cache.

07

CHAPTER 7

The inventory

Your whole lot, as cards, with filters to find any vehicle in seconds.



The **Inventory** tab.

2 Search and filter.

3 Status.

4 Published.

5 Edit.

Each card shows the cover photo with your watermark, the **status** on top of the photo (green **Available**, amber **Reserved**, red **Sold**), the internal code, mileage, transmission, fuel, the price (or **Price on request**), whether it is negotiable, and the branch.

Search and filter

In a single row: search by make, model, plate or code, and filter by make, status, new or used, year from, year to, max price, max mileage and published only. For example: only available ones, up to 30,000 dollars.

Publish and unpublish

The switch on each card publishes or unpublishes the vehicle. **Only published, available vehicles** are shown and offered by the AI agent. Use it for a vehicle that hasn't passed inspection yet or is in the shop.

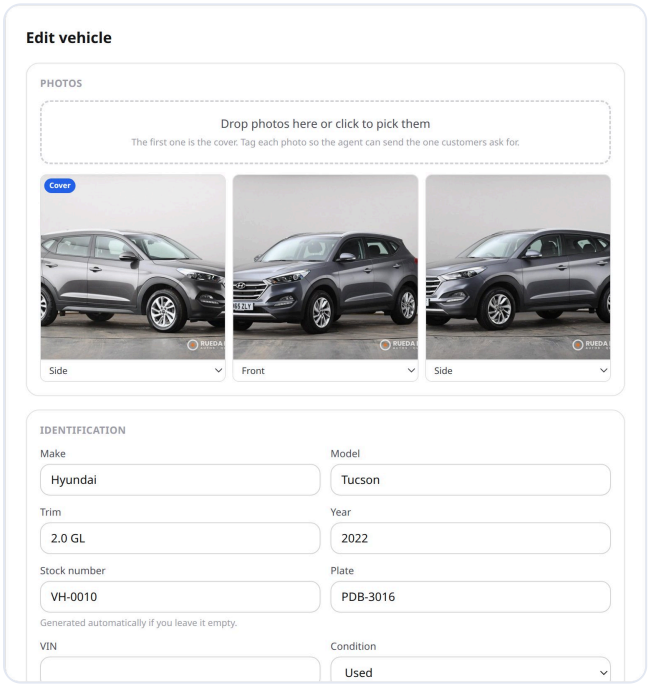
08

CHAPTER 8

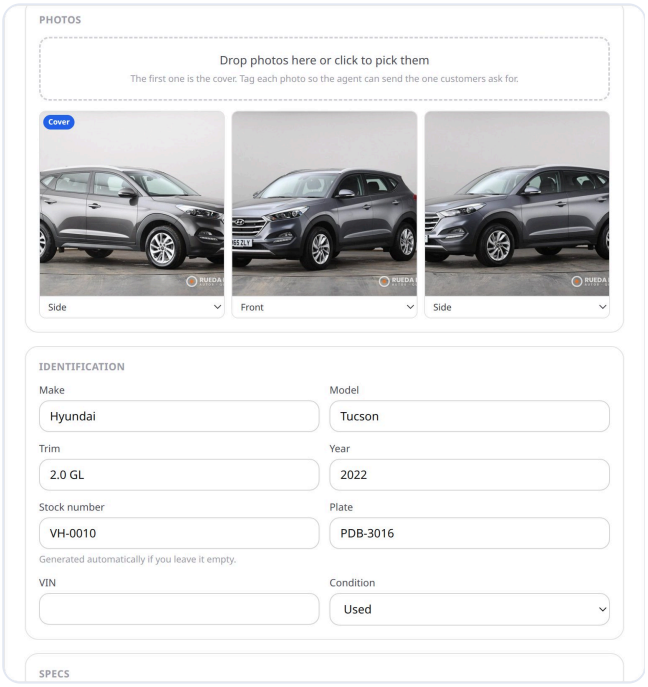
Add a vehicle

A vehicle's form, top to bottom, in a single window.

1. In **Inventory**, click **New vehicle**.
2. In **Identification**: make, model, trim and year. You can leave the **Stock number** empty so it is generated. The plate, the VIN and the condition go here too: **New**, **Used** or **Demo**.
3. In **Photos**, drag them in or click to pick them (up to 30 per vehicle). Tag each one's angle.
4. In **Specs**: mileage, transmission, fuel, engine, drivetrain, doors, colors and the **Features**, one per line.
5. In **Vehicle condition**: previous owners, months of warranty, accident and service history.
6. In **Price and listing**: the price, whether it is negotiable, the status and **Published**. Then, in **Where it is**, the branch and the city.
7. Click **Save**.



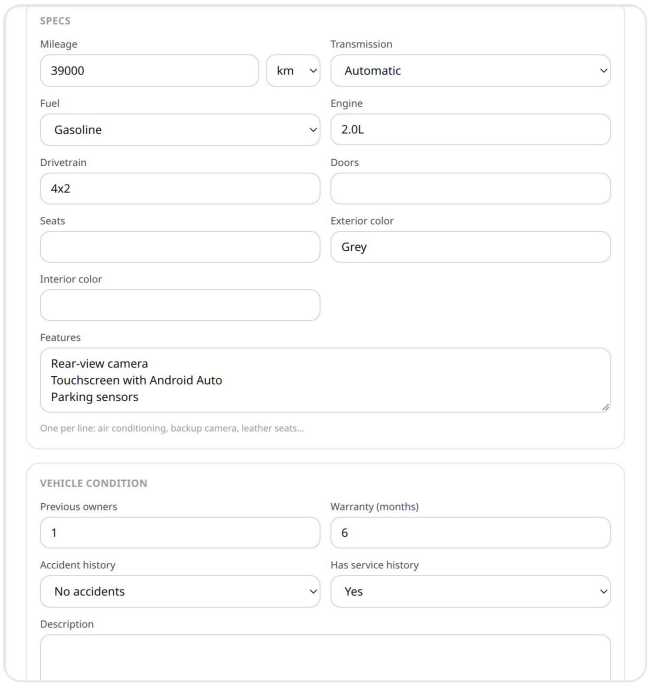
Identification of the Hyundai Tucson.



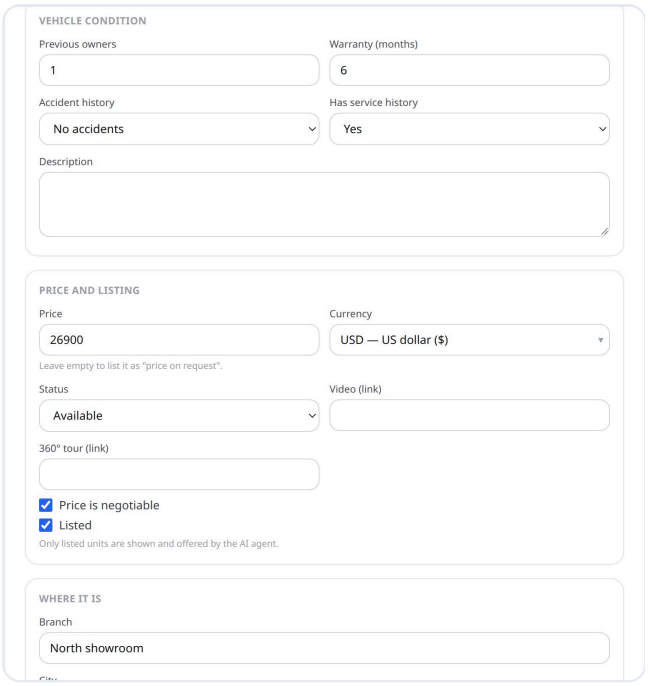
Photos: the first one is the cover; each with its angle.

TIP

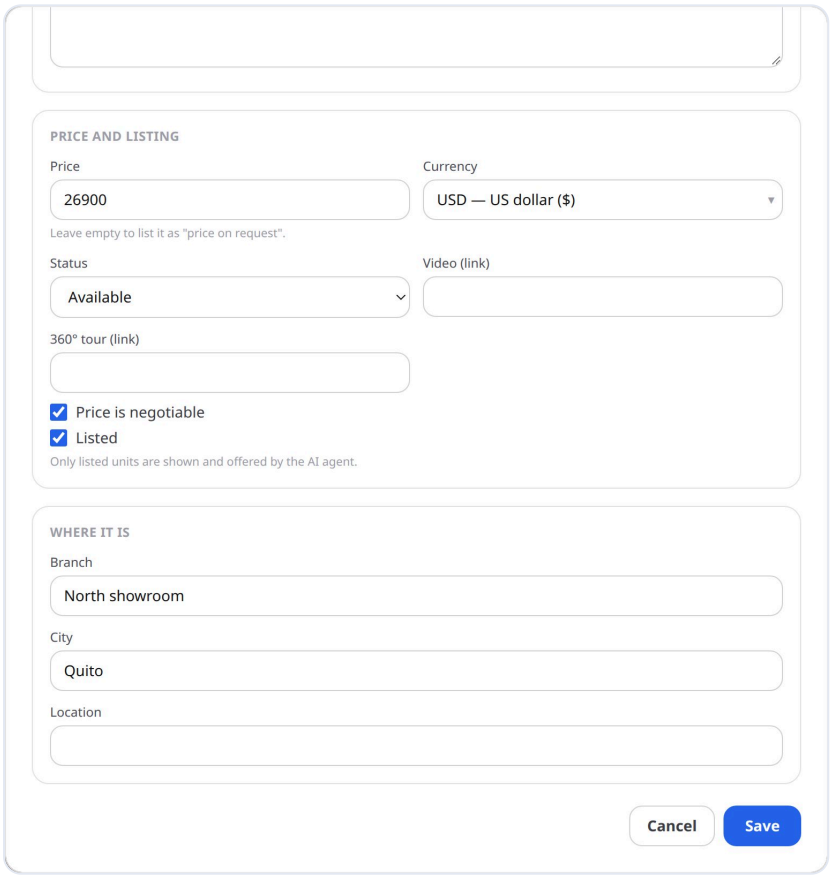
If you upload photos before saving, Omnifox saves the vehicle first (it needs at least make, model and year) and uploads the photos in one go. The vehicle keeps its internal code.



Specs and **Features**, one per line.



Vehicle condition.



Price and listing: with no price, the vehicle is listed as “Price on request”.

Field	What it is for
Each photo's **angle**	Front, side, interior, engine… The agent sends exactly the one the customer asks for ("got one of the interior?").
Features	One per line. The agent uses them to answer "does it have a rear-view camera?".
Accident history	No accidents, with accidents or **Unknown**: the agent doesn't claim what you don't know.
Empty **price**	Listed as **Price on request**; the agent offers to have an advisor confirm it.
Negotiable	Shown next to the price.

09

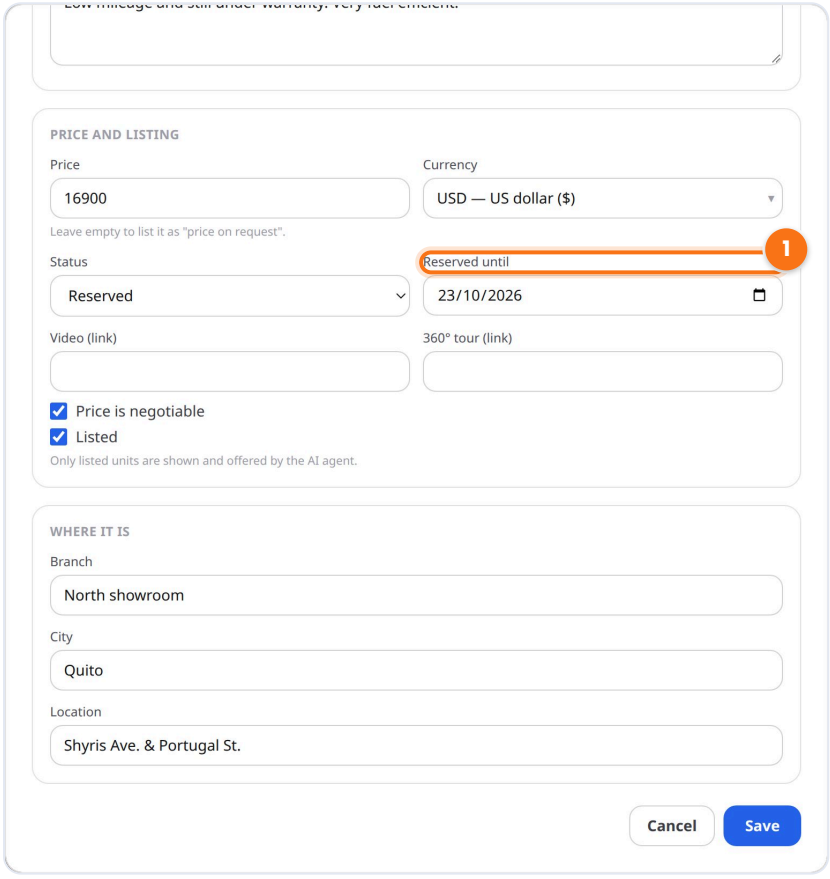
CHAPTER 9

Day to day: holds, sales and import

What happens every day on the lot: a customer leaves a deposit, a vehicle is sold, a new batch arrives.

Hold a vehicle

1. Click **Edit** on the card.
2. In **Price and listing**, change the status to **Reserved**.
3. A **Reserved until** field appears: set the date the hold expires and save.



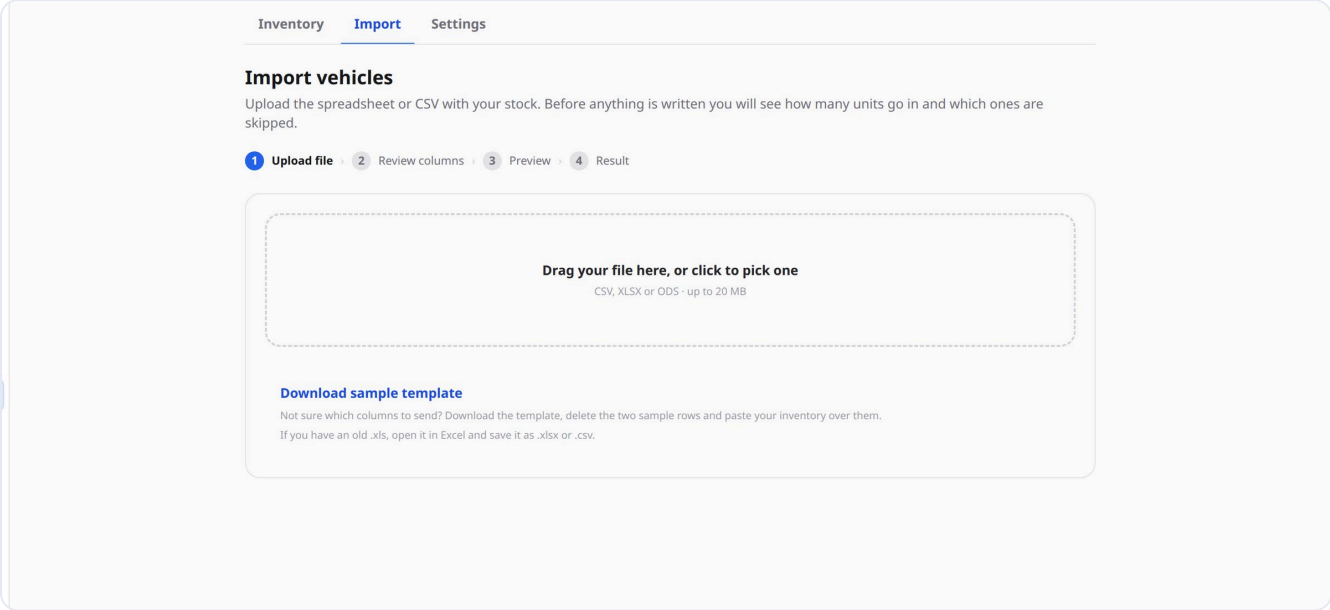
A reserved vehicle, with its expiry date.

1 **Reserved until**.

Mark a sale

Change the status to **Sold**: the vehicle drops out of the listing on its own and the agent stops offering it. It stays in the inventory, with its history.

Import many vehicles



The **Import** tab: four steps, nothing is written until the end.

1. Open the **Import** tab. If you don’t have a file, click **Download sample template**.
2. **Upload file**: drag in your Excel or CSV.
3. **Review columns**: tell it which column in your file is each field.
4. **Preview**: check the rows before importing.
5. **Result**: how many vehicles were created and which rows had problems.

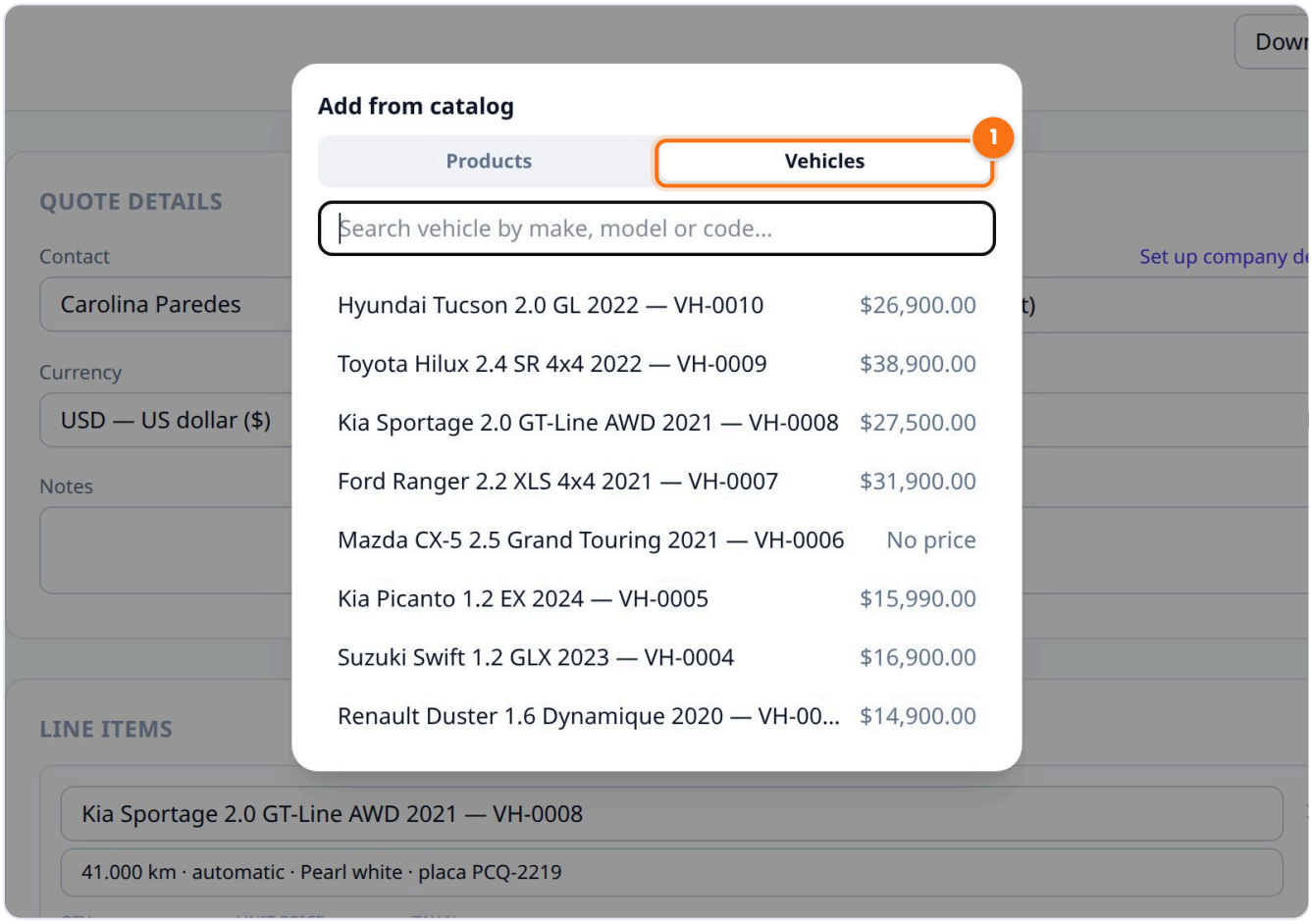
10

CHAPTER 10

Quote a vehicle

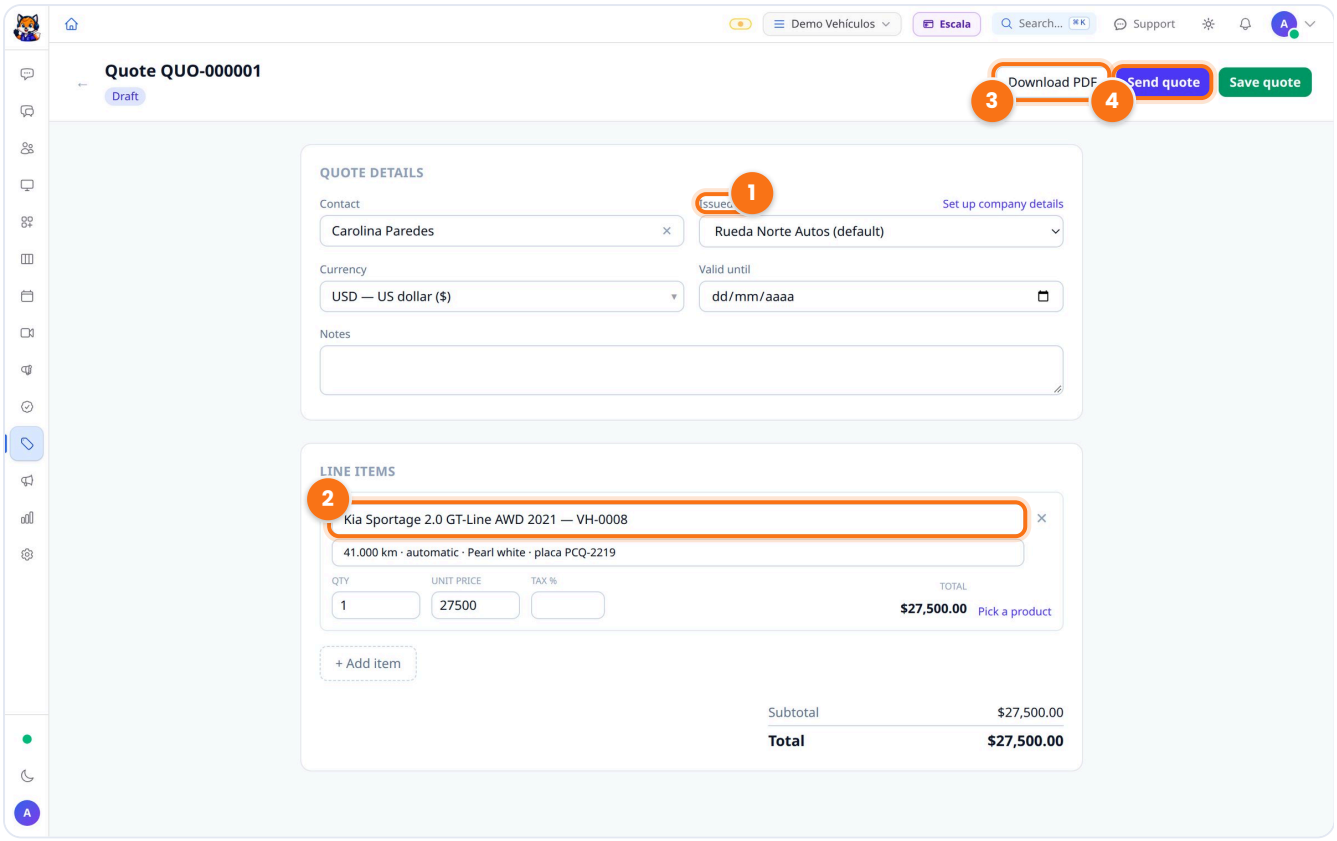
A formal quote with your dealership's details and logo, built from the inventory in a minute.

1. Go to **Quotes** and click **New quote**.
2. Choose the **Contact** (Carolina Paredes in the example).
3. On the line, click **Pick a product** and open the **Vehicles** tab: the vehicles on your lot (except sold ones) show up with their code and price. Search and pick the vehicle.
4. The line fills in with the vehicle, its code and its price. You can change the price, add tax or add more lines.
5. Check **Issued by**: your company's details and logo (set them up in **Set up company details**).
6. Click **Save quote**. Then **Download PDF** or **Send quote** by email or WhatsApp.



Pick a product → **Vehicles**: the vehicles with their code and price.

1 The **Vehicles** tab shows up because the module is on.

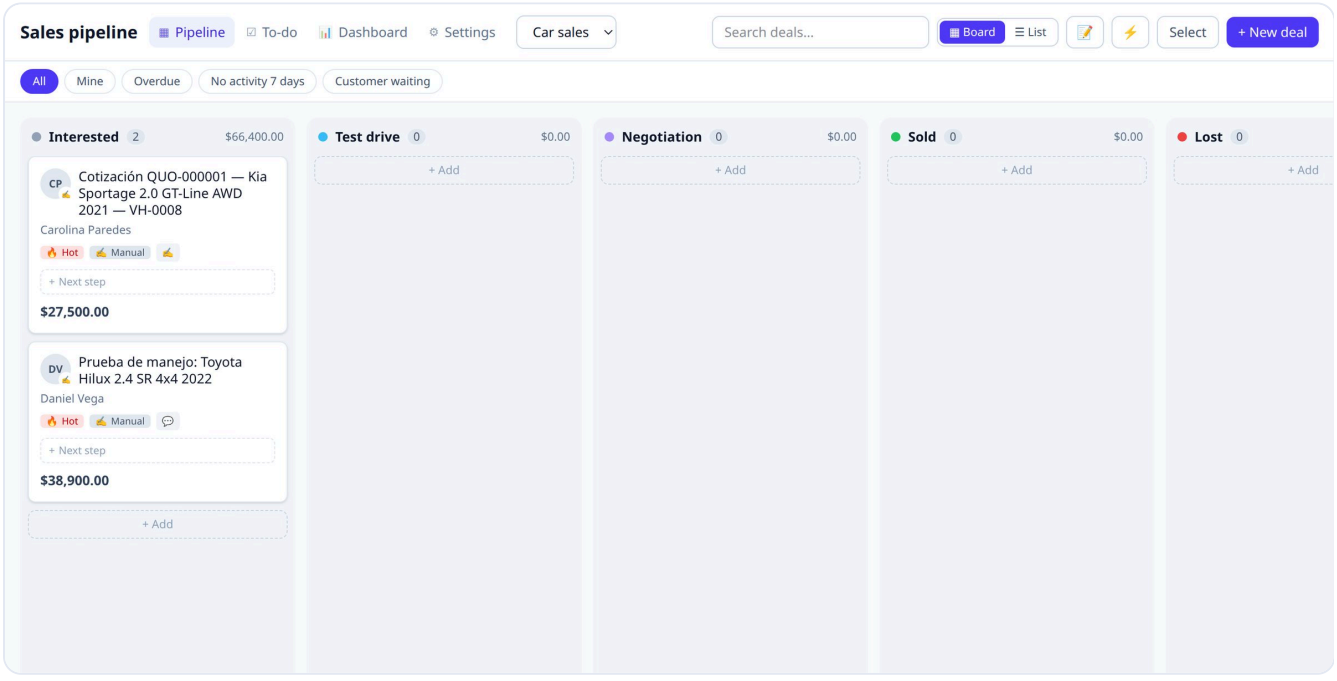


The saved quote.

1. **Issued by**: your company.
2. The line with the vehicle.
3. **Download PDF**.
4. **Send quote**.

The CRM deal

If you turned on **Create a CRM deal** (chapter 5), when you save the quote the deal shows up in the chosen pipeline, with the quote value. When the quote is accepted, the deal is marked as won.



The **Car sales** pipeline: the quote's deal and the test drive deal booked by the AI.

HEADS UP

After the first save, the editor's **Contact** field may look empty. The contact was saved correctly: reload the page before saving again so you don't lose it.

11

CHAPTER 11

Set up the AI agent

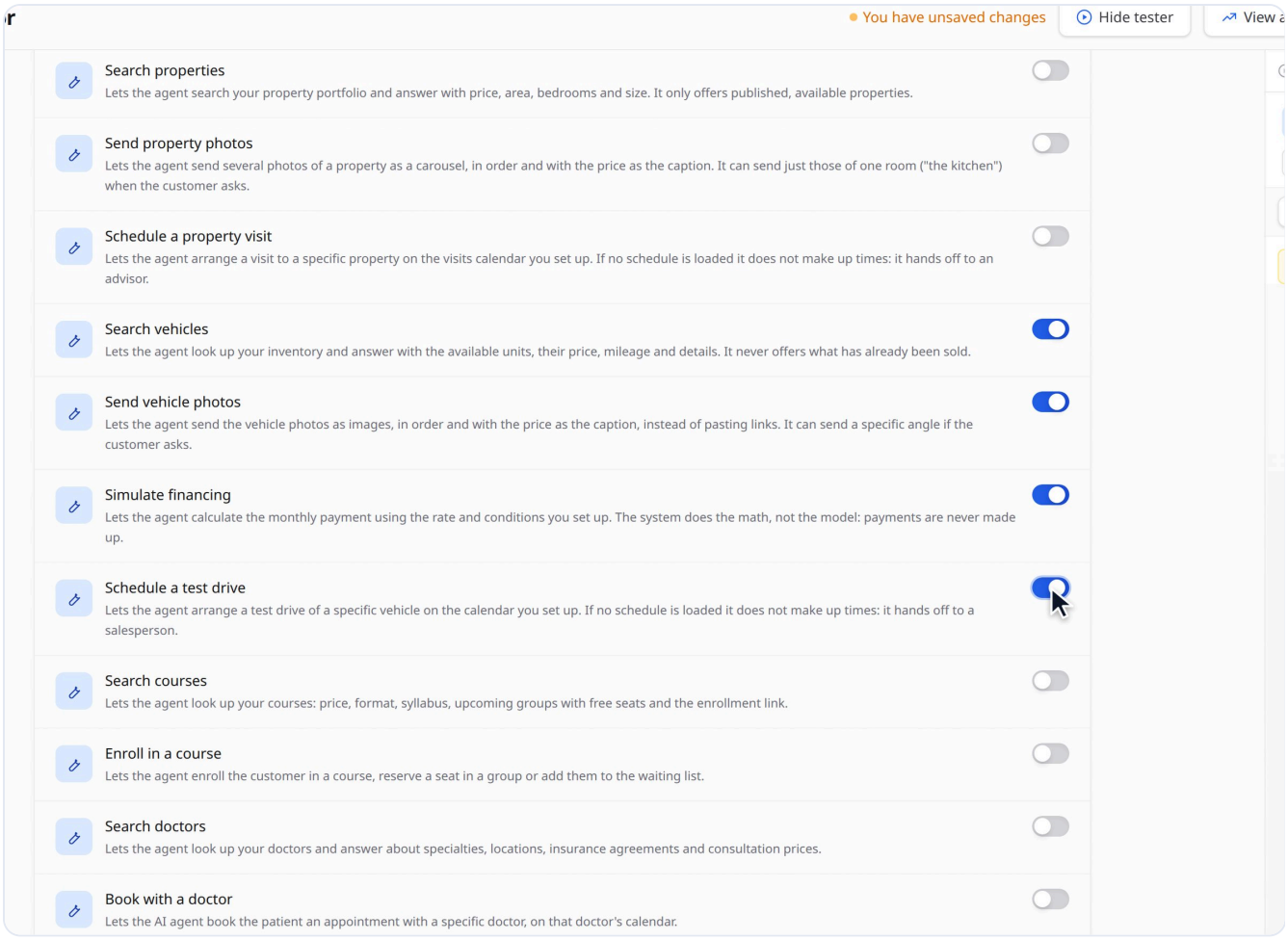
An AI agent that serves your lot: it searches the inventory, sends photos, simulates the payment and books the test drive.

The module's tools

Tool	What it does
Search vehicles (`search_vehicles`)	Searches the published, available inventory by make, model, free text ("4×4 pickup"), year, price, mileage, transmission, fuel or condition, and returns year, mileage and price.
Send vehicle photos (`send_vehicle_photos`)	Sends a vehicle's photos as images, with the price in the caption and your watermark.
Simulate financing (`simulate_financing`)	Calculates the payment with your rate, minimum down payment and maximum term. With no rate, it doesn't simulate.
Schedule a test drive (`book_test_drive`)	Offers free times from the test drive calendar and books the appointment tied to the vehicle; asks for the license if you require it. Creates the CRM deal if you turned it on.
Assign to agent or team	Hands the conversation to a salesperson: negotiating the price, a trade-in, a hold with a deposit.

Step by step

1. Go to **AI Agents**, click **Create AI agent** and choose **From scratch → Start blank**.
2. In **Identity**, give it a name (for example, "Lot Advisor") and set its **Language** to English: a blank agent starts in Spanish.
3. In **Instructions**, paste the sample prompt on the next page and adapt it to your business.
4. In **Tools**, in the **Vehicles** group, turn on the four tools, and also **Assign to agent or team**.
5. In **Engine level**, choose **Pro Fox**: it reasons better when it chains several tools in a sale. Save.
6. Test it in the **Live tester**, on the right.
7. When you are happy with it, connect it to your channels in **Connections**.



The Vehicles group tools turned on in the agent editor.

Sample prompt: Lot Advisor

Copy it and change the business name, the city and whatever else you need. Words starting with **!** are the tools.

```
# Role
You are the Lot Advisor at Rueda Norte Autos, a new and pre-owned car dealership in Quito. You answer
on WhatsApp, Instagram and the website chat. Your goal is to find the right vehicle for each person,
show it with photos, simulate the monthly payment if they want financing, and book a test drive.

# Tone
- Friendly, clear and upbeat, without overdoing it.
- Short messages: 2 to 4 lines. One question per message.
- Reply in the language the customer writes in.

# What to ask (no interrogation)
1. What kind of vehicle they want and what they'll use it for (city, work, family, off-road).
2. Their budget or the monthly payment they can afford.
3. Whether they'll pay cash or finance it.
If they already said it, don't ask again.

# When to use !search_vehicles
- As soon as you know what kind of vehicle they want, search right away; don't ask for the brand first.
- ALWAYS before talking about price, mileage, trim, features or availability.
- Offer at most 3 vehicles, each with year, mileage and price.
- Never offer a reserved or sold vehicle as if it were available.
- If a vehicle shows "price on request", don't make up a number: offer to have an advisor confirm it.
```

```
# When to use !send_vehicle_photos
- When the person shows interest in a specific vehicle or asks for photos.
- Send the photos of ONE vehicle at a time. If they ask for an angle (interior, engine, rear), send
that one.

# When to use !simulate_financing
- Whenever they ask about payments, credit or financing. Never calculate it in your head.
- Make clear it's an estimate and that approval is up to the lender.

# When to use !book_test_drive
- As soon as the person wants to see or drive a car.
- Offer only the time slots the tool returns and book the one they choose.
- Ask for the details the tool requires (name, phone and driver's license number) in a single message.

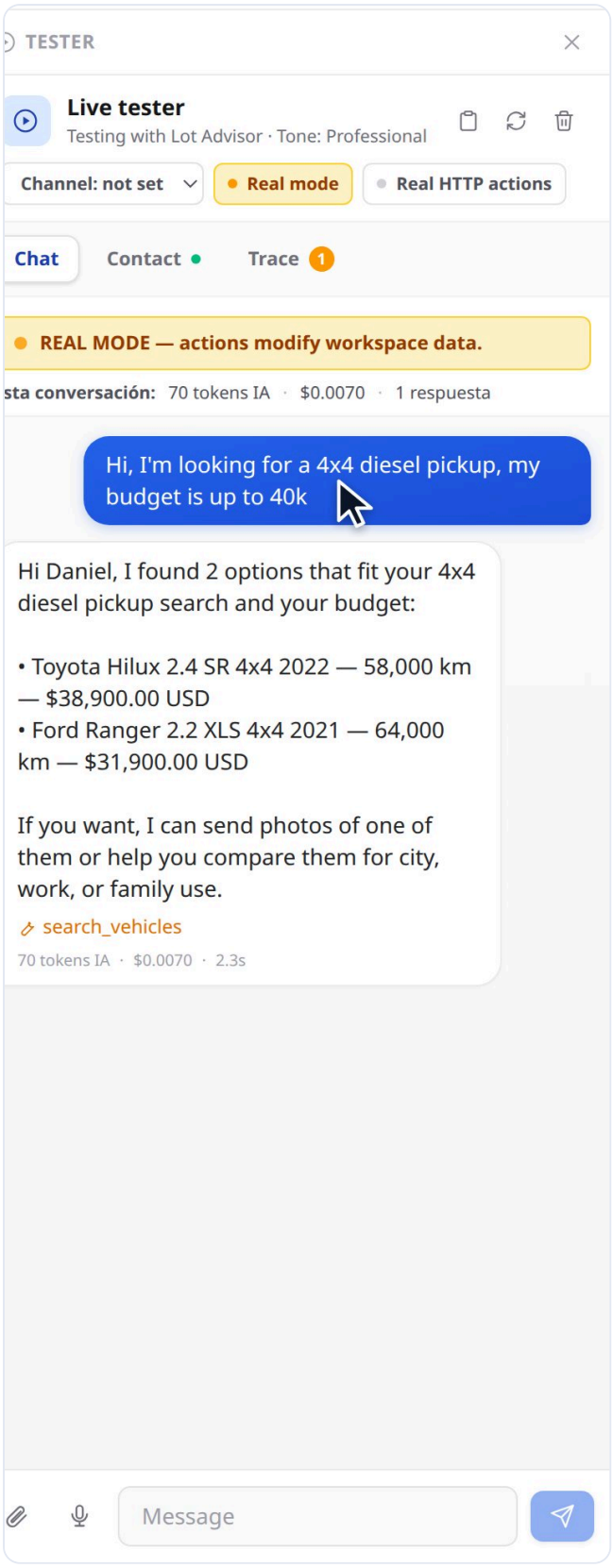
# When to hand off to a person (!assign_to_user_or_team)
- They want to negotiate the price, trade in their car or ask for a discount.
- They want to place a deposit or pay.
- They ask to talk to someone or they're upset.
Before handing off, let them know and leave a short summary: vehicle of interest, budget and what they
asked for.

# How to refer to a vehicle
When you call !send_vehicle_photos, !simulate_financing or !book_test_drive, identify the vehicle by
its stock number (VH-…) exactly as !search_vehicles returned it.

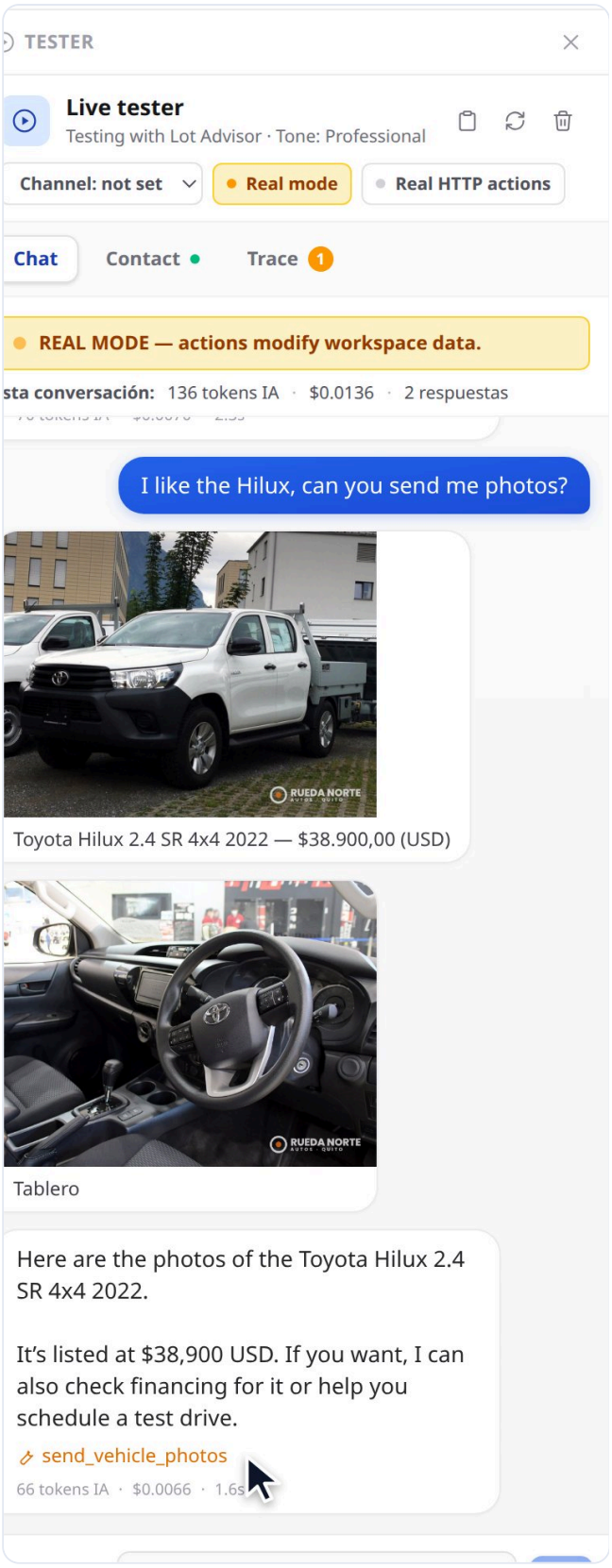
# Never
- Make up vehicles, prices, mileage, payments or time slots.
- Promise credit approval.
- Ask for card details or passwords in the chat.
```

Test it

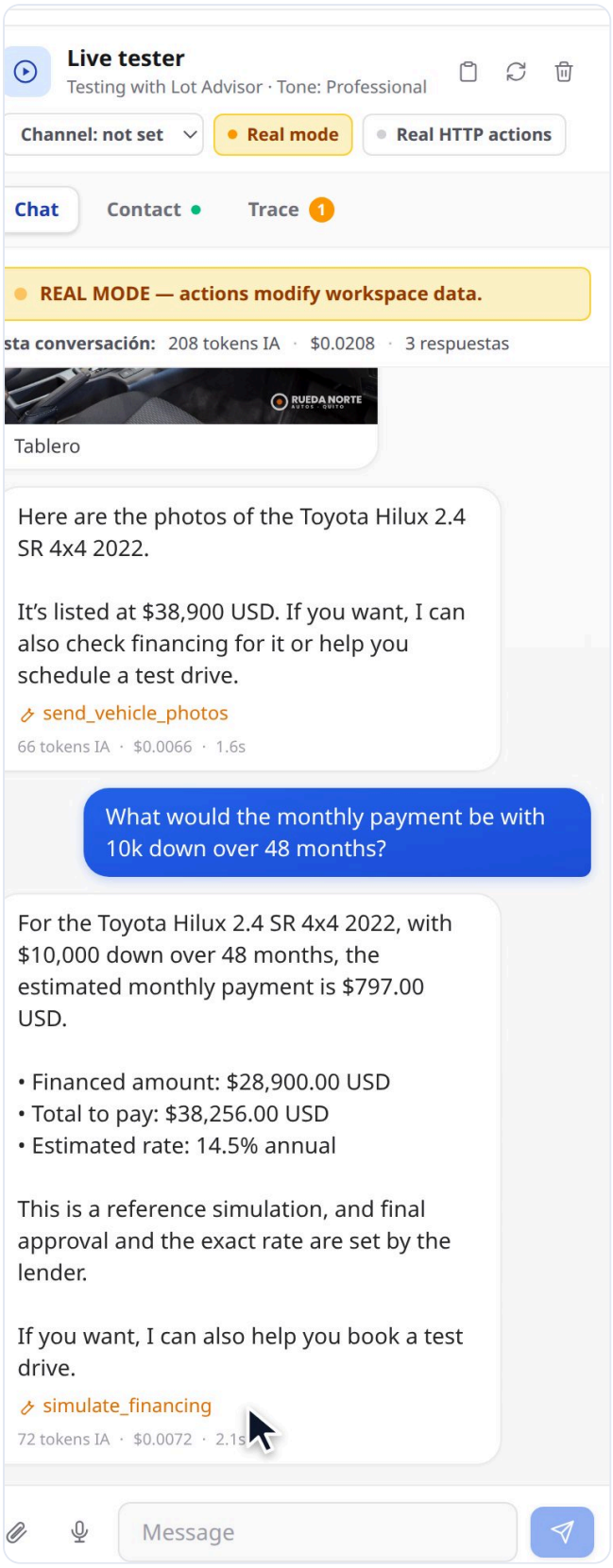
In the **Live tester**, open the contact tab, choose a test contact and turn on **Real mode**: that way the tools actually run in your workspace (the test drive is booked on the Calendar and the deal lands in the CRM).



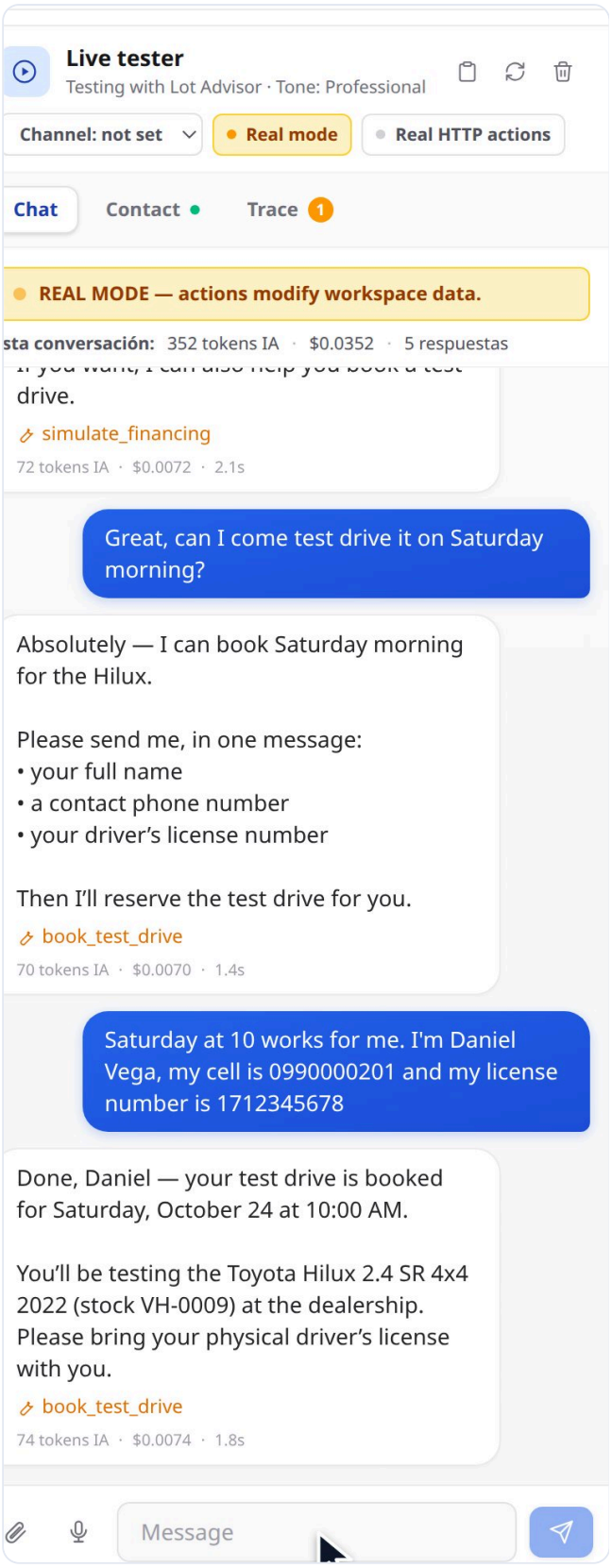
It searches the inventory and offers only matching pickups. The sold one doesn't show up.



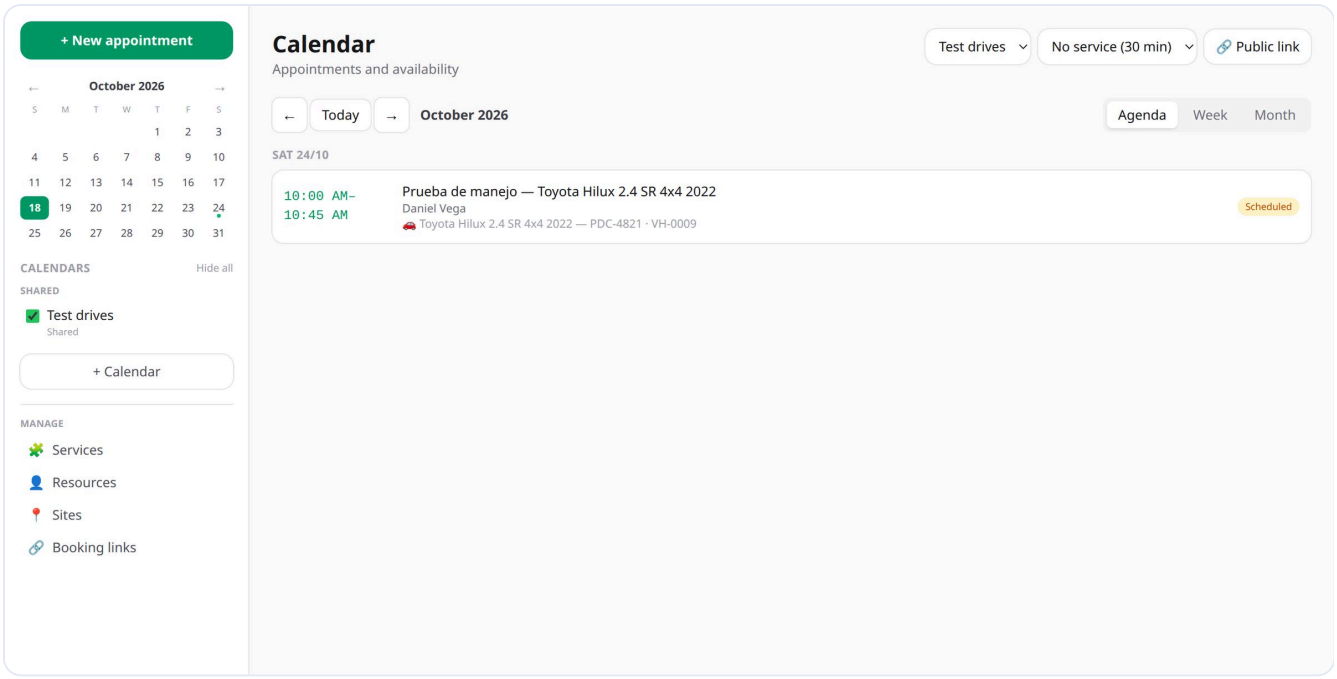
It sends the Hilux photos, with the price and your watermark.



The payment is calculated by the system with your rate: a reference simulation.



It asks for the details and the license, and books at a free time.



The test drive on the Calendar, tied to the vehicle.

> **NOTE**
>
> With **Real mode** off, tools that write (like booking the test drive) are only simulated; lookup tools such as **Search vehicles** and **Simulate financing** do use your real data.

12

CHAPTER 12

FAQ and current limits

Does turning on the Vehicles module cost anything?

No. It is turned on for free per workspace and doesn't change your plan.

Can the agent offer a sold vehicle?

No. It only offers **published, available** vehicles. A reserved or sold one is never offered as available.

Does the agent make up payments?

No. The payment is calculated by the system with the rate in your settings. With no rate, the agent gives no numbers.

Can I hide prices?

Yes: turn off **Show prices publicly**. You can also leave a vehicle without a price so it says "Price on request".

What happens to my original photos if I turn the watermark off?

Nothing: the original is never overwritten. When you turn it off, photos look as they were uploaded.

How many photos can a vehicle have?

Up to 30. The first one is the cover; you can pick another one with **Use as cover**.

Where do I see test drives?

On the Calendar you chose in the settings. Each appointment says which vehicle to bring out.

Are duplicate CRM deals created?

No: if the contact already has an open deal in that pipeline, it is reused.

Can I quote several vehicles in the same quote?

Yes: add one line per vehicle with **Add item** and **Pick a product**.

Can I load my whole lot at once?

Yes, with the **Import** tab (Excel or CSV, with a preview before anything is written).

Current limits

Trade-ins

The **Accept trade-ins** switch is only stored for now: the agent hands those cases to a salesperson.

No online payments

Holds with a deposit and payments are handled by your team; Omnifox doesn't charge on your behalf.

Reference simulation

The payment is a reference: approval and the final rate are set by the lender.

Some texts in Spanish

The name of a blank new agent, the token line in the tester and the title of CRM deals can show up in Spanish; rename them if you like.



Need help?

Watch the Vehicles module video tutorial on the Omnifox YouTube channel. If something doesn’t look like the manual, write to us from **Support**, top right in Omnifox.