

Rebeca's Guide — all your channels in one inbox

This guide is for anyone who has just hired **Rebeca**, the virtual assistant of the **OmniLeadHub** module. She answers whoever messages your business on **Instagram, Messenger, WhatsApp, Telegram, email and your website chat** — all in one inbox —, finds out what the person wants and hands the lead to the right person on your team. You don't need any tech skills: every step names the exact button.

The screenshots are real, taken in the panel of a sample company (*Casa Modelo Reformas & Materiais*). The sample company is Brazilian, so the texts it wrote itself show up in Portuguese; in your account you'll see your own.

Never been in the panel? Read the [Getting started](#) chapter first: it shows how to sign in, how the screen is organized and how to find modules in the menu.

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1. What Rebeca does for you

People who message your business want an answer **now** — and whoever waits goes looking elsewhere. Rebeca answers right away, on any channel, at any time. She:

- **answers questions** with what you taught her (services, prices, the area you cover);
- **understands audio, photos and documents** the person sends — and replies to the content;
- **finds out who she's talking to** and what they want, asking the questions you choose;
- **asks for a WhatsApp number or email** during the chat, so the lead isn't lost;

- **sends the lead to your pipeline** (your CRM) and **alerts you on WhatsApp** with a summary;
- **hands the conversation to the right area** of your team — sales, quotes, support;
- **sends the PIX** payment code with the agreed amount, if you want (Brazil only — she never says the payment arrived).

What she does **not** do: make up prices you didn't teach her, promise deadlines that aren't written down, or pretend to be human. When she doesn't know, she says so honestly.

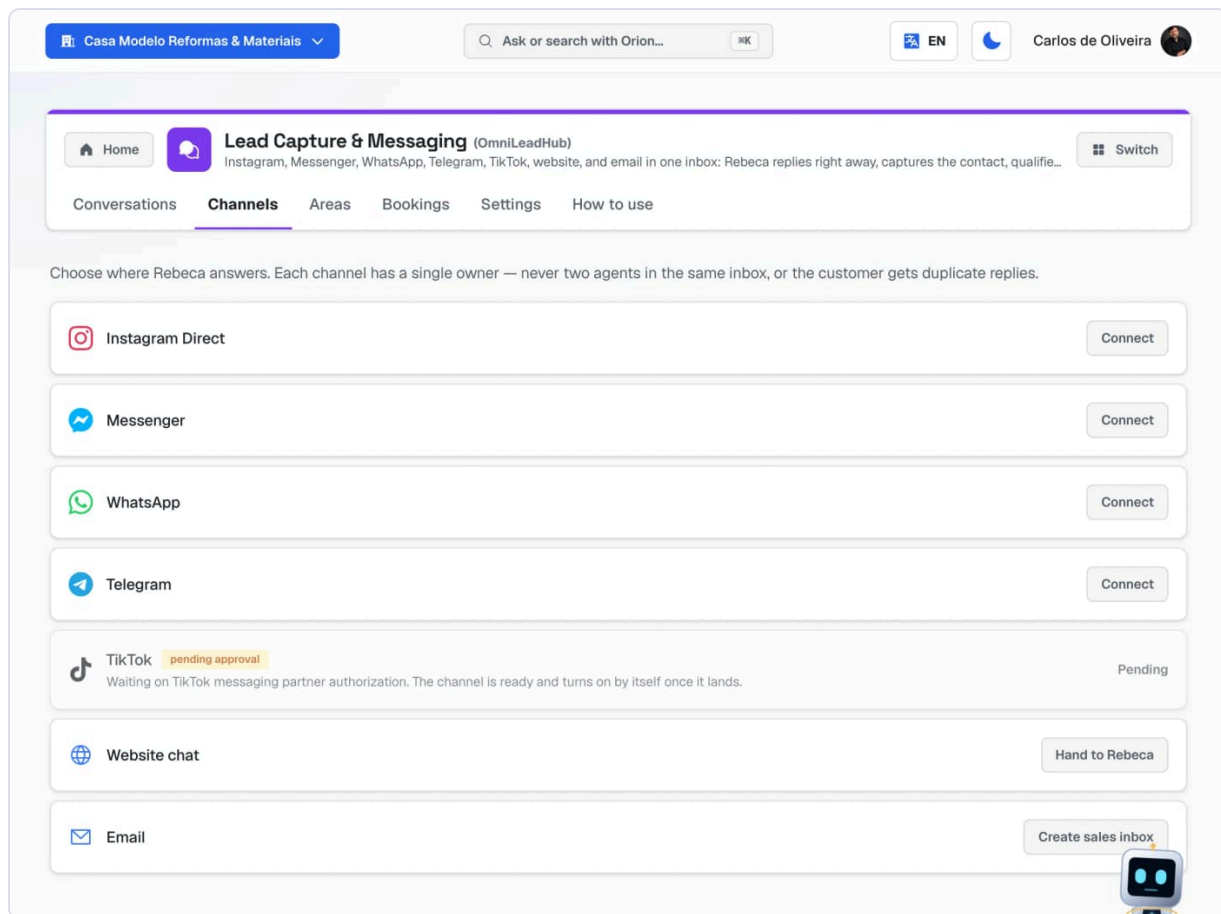
Rebeca handles people who are arriving. Existing customers with a problem (repairs, complaints) belong to the Support Desk — if you have that module, she routes them there.

2. Before you start

What	Why
Access to your social accounts	To connect Instagram and Messenger you sign in with the Facebook account that manages your business Page.
A phone with your sales WhatsApp	If you want Rebeca on WhatsApp. It can be the number you already use or one just for sales.
The WhatsApp of whoever receives the leads	That's where each qualified lead alert goes.
Your price list and list of services	It's what Rebeca uses to answer. It can be a PDF, a page on your website or plain text.

3. Step 1 — Connect your channels

Where: Home → Your apps → OmniLeadHub → Channels tab.



Each channel has a **single owner** — never two assistants in the same inbox, or the customer gets duplicate replies. Connect one at a time:

Instagram and Messenger

1. On the **Instagram Direct** (or **Messenger**) card, click **Connect**.
2. **You leave the panel and go to Facebook.** Sign in with the account that manages your business Page and authorize the Page.
3. You're taken back to the panel with a success message. If it says the authorization was saved and the channel turns on when Meta approves it, everything's fine: just wait.

WhatsApp

1. On the **WhatsApp** card, click **Connect**.
2. Choose **Use the current number** (the WhatsApp your business already uses) or **Connect a dedicated number** (a SIM just for Rebeca).
3. A QR Code appears. On that number's phone, open WhatsApp → **Linked devices** → **Link a device** and point the camera at the code.
4. Keep the screen open: the code refreshes by itself and the screen tells you when it connects.

If you use **WhatsApp Business**, turn off its automatic **Greeting message** (on the phone: **Business tools** → **Greeting message**). Rebeca does the greeting now; with both on, the customer gets two welcome messages in a row.

Email

Click **Create sales inbox**. The system creates an email address and shows it to you. Everything that arrives there lands in Rebeca's inbox.

Website chat

Click **Hand to Rebeca**. A piece of code appears: click **Copy code** and paste it into your site, at the bottom of the page (if someone else runs your site, send them the code). If your site is already handled by **Sérgio**, pick one of the two — the channel belongs to only one.

Telegram

Click **Connect** and follow the 4 steps the screen shows (create a bot with Telegram's **BotFather** and paste the code it returns into the **Bot token** field).

TikTok shows as **Pending**: it still needs an authorization from TikTok itself. When it comes through, the channel turns on by itself — you don't have to do anything.

4. Step 2 — Teach Rebeca about your business

Where: **Settings** tab.

4a. Who she is and how she talks

 **Identity**

AGENT NAME

Rebeca

ROLE (PERSONA)

SDR — Qualify leads and book meetings

TONE OF VOICE

Casual and friendly

 **Messages**

GREETING (FIRST MESSAGE)

Oii! 🌟 Em que posso ajudar?

AFTER-HOURS MESSAGE

Estamos fora do horário comercial agora. Volto a falar com você assim que possível!

SPECIFIC INSTRUCTIONS (OPTIONAL)

E.g. Always offer 5% cash discount. Never promise Sunday delivery.

☒ Rebeca active (replies on messengers, site chat and email)

Field	What to enter
Agent name	The name the customer sees. Keep "Rebeca" or change it.
Role (persona)	If you sell services, SDR — Qualify leads and book meetings or Sales — Sell, handle objections, close .
Tone of voice	Casual and friendly works well for most services.
Greeting	The first line the person reads. Short, with your business name.
After-hours message	What she says when someone writes outside the hours you set.
Specific instructions	Your house rules, in plain sentences. E.g. "We're closed on Sundays."
Rebeca active	Keep it checked. Unchecked, she stops answering on every channel.

4b. Hours and questions

 **Business hours**

Check the days your company is open. The assistant uses this to know when to answer normally and when to use the after-hours message.

TIME ZONE

America/Sao_Paulo

☒ Monday	09:00 	to	18:00 
☒ Tuesday	09:00 	to	18:00 
☒ Wednesday	09:00 	to	18:00 
☒ Thursday	09:00 	to	18:00 
☒ Friday	09:00 	to	18:00 
☐ Saturday	Closed		
☐ Sunday	Closed		

With no day checked, the assistant answers at any time — exactly as it does today.

Check the days and hours your business is open. Outside those hours she keeps answering, but says the team will get back later. Right below, in **Qualifying questions**, click **Add question** for each thing you need to know before taking the job (e.g. "*Which neighborhood?*"). She asks one at a time, inside the conversation — never as a form.

4c. What she needs to know to sell

What she needs to know to sell

Rebeca only states price, deadline and coverage if it is written here or in your company profile. Anything else, she honestly says she does not have that information — and the lead reaches you through the WhatsApp alert.

CATALOG AND PRICES

E.g.: Start plan — \$500/month, includes X and Y. Delivery: 5 business days.

SCRIPT AND SERVICE RULES

E.g.: Always ask the city before discussing deadlines. Never promise same-day delivery.

Save material

This is the most important card. Rebeca only states price, deadline and coverage if it's written here (or in your company profile).

- **Catalog and prices:** each service with its price and what it includes. E.g. "*Bathroom renovation: from \$1,600, includes demolition and tiling. Lead time: 15 business days.*"
- **Script and service rules:** how you want her to run the conversation. E.g. "*Always ask the city before discussing deadlines.*"

Click **Save material**.

4d. Files and pages she reads

Files she reads

Upload the proposal, the catalog, the price list or the service manual: the text becomes memory and Rebeca starts answering from what is written in them.

These files belong to your company and serve the whole agent team, not only Rebeca. They are the same ones shown in [Memory](#).

 DOCUMENTS (0)

Upload file

PDF, TXT, Markdown or DOCX (up to 15MB). The text becomes memory the agents read before working.

No documents yet. Upload proposals, catalogs, manuals — they become team knowledge.

Under **Upload file**, send your proposal, catalog or price list as a PDF. The text becomes memory and she starts answering from what's written there.

Learn from a web page

Paste a page address — your price list, a service page, an FAQ — and Rebeca starts answering from what is written there.

Only teach pages your company controls or trusts: their text becomes your company's word in Rebeca's mouth. What is stored is the content from the day you taught it — if the page changes, teach it again. Up to 20 pages.

Teach this page

No pages yet

Paste one of your page addresses above and Rebeca learns what is written there so she can answer for you.

Under **Learn from a web page**, paste the address of a page on your site (prices, a service page, an FAQ) and click **Teach this page**. If the page changes, teach it again.

4e. PIX and files to send (optional)

◆ Get paid by PIX

When the customer closes, Rebeca sends the PIX "copy and paste" code with the agreed amount and asks for the receipt. Rebeca never says the payment was confirmed: the receipt goes to you to check in your account, by WhatsApp and by the handoff e-mail.

☐ Send the PIX when the customer closes

PIX KEY

RECEIVER'S NAME (AS SHOWN BY THE BANK)

RECEIVER'S CITY

PIX is Brazil only. Check **Send the PIX when the customer closes** and fill in the key, name (as the bank shows it) and city. She sends the PIX "copy and paste" code and asks for the receipt — **she never confirms payment**.

Photos, videos and documents Rebeca can send

Add here what Rebeca can send to the customer during the chat: your price list as a PDF, photos of finished jobs, a video showing your work. Rebeca only sends what is on this list and turned on, and only when the conversation calls for it.

Each file is saved right away, no need for the Save button above.

FILE

Choose file

Photo (JPG, PNG or WEBP) up to 5 MB · MP4 video up to 16 MB · PDF up to 20 MB

TITLE

E.g.: 2026 price list

WHEN TO SEND

E.g.: when the customer asks for photos of finished jobs

In a few words, when Rebeca should send this file.

Add to the list

No files yet

Add a photo, a video or a PDF above, and Rebeca will be able to send it to the customer when it makes sense.

Add here what she can send the customer (price list PDF, photos of finished jobs, a video): **Choose file** → **Title** → **When to send** → **Add to the list**. This card saves right away.

After changing the cards above, click **Save configuration**.

5. Step 3 — Tell her who gets the lead

The alert for each lead

Who gets the lead alert

When Rebeca qualifies a lead, this WhatsApp gets a summary: who it is, what they want and how to reach them. The alert is sent from your business number, once per conversation, after 15 minutes without a new message.

WHATSAPP OF WHO HANDLES LEADS

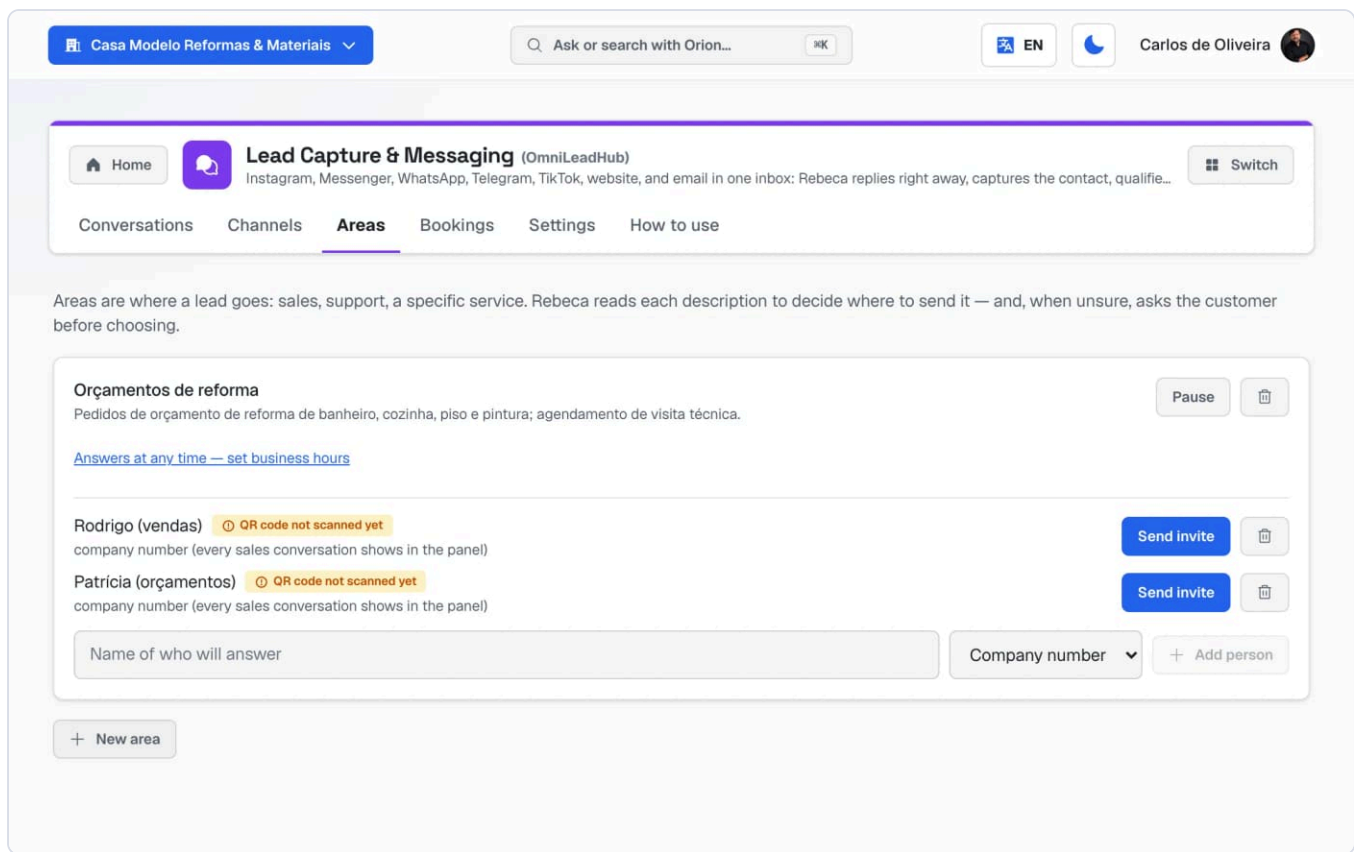
+56912345678

Save

On the **Settings** tab, **Who gets the lead alert** card, enter the WhatsApp of whoever handles leads (with country code and area code) and click **Save**. When Rebeca qualifies a lead, that WhatsApp gets a summary: who it is, what they want and how to reach them. The alert goes out once per conversation, after 15 minutes without a new message.

Your team's areas

Where: Areas tab.



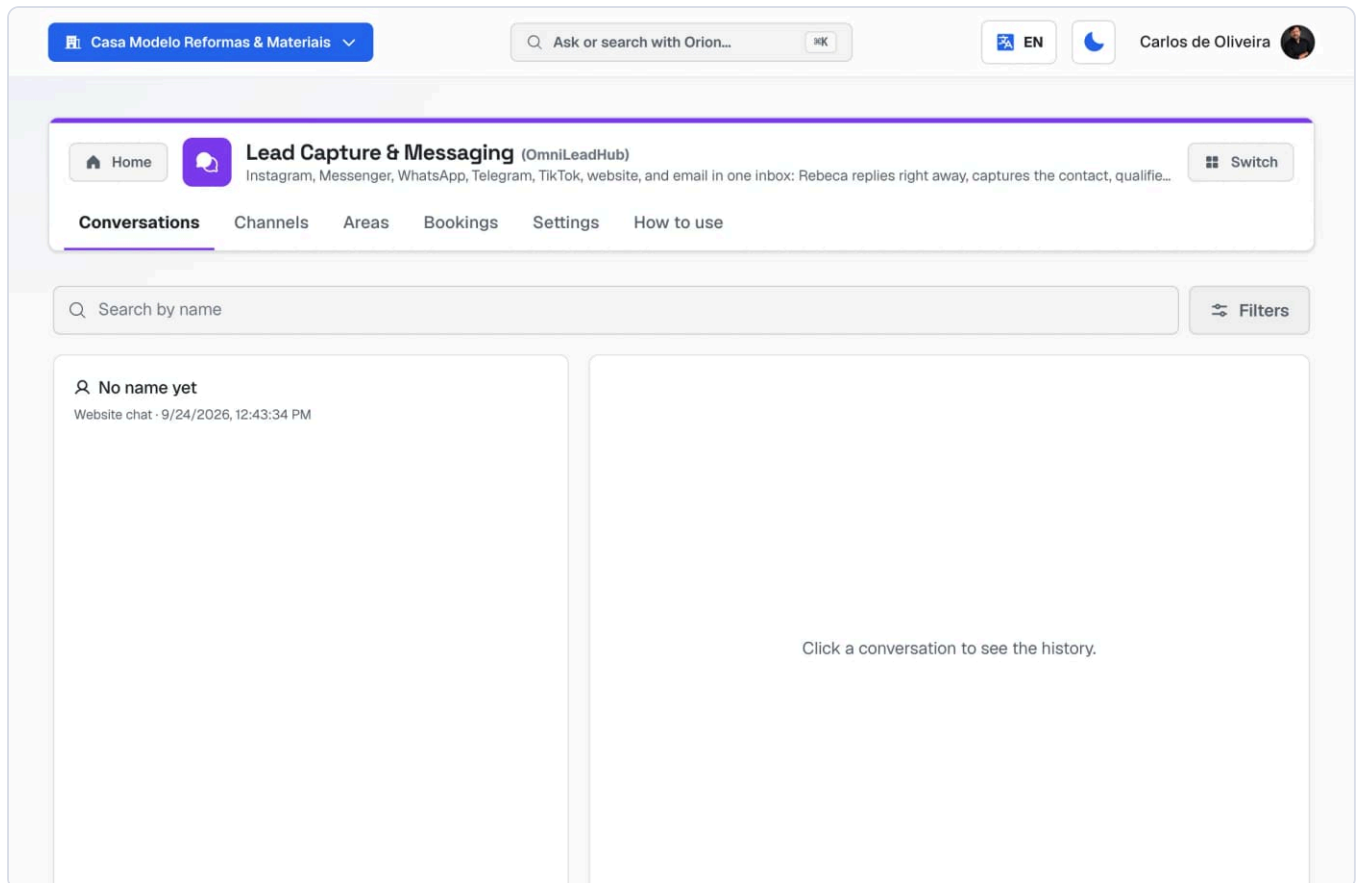
An area is **who handles** each type of lead: sales, quotes, support. Rebeca reads each area's description to decide where to send it — and, when unsure, asks the customer.

1. Click **New area**, give it an **Area name** and write **what this area handles** — be specific (e.g. "*bathroom and kitchen renovation quotes, site visits*"). Click **Create area**.
2. On the area's card, type the **Name of who will answer**, choose **Company number** or **Personal number** and click **Add person**.
3. Click **Send invite**. The link is copied: send it to that person's phone.
4. The person opens the link on their phone and scans the QR. The tag changes from **QR code not scanned yet** to connected.

Company number shows every sales conversation from that phone in the panel. **Personal number** shows only conversations with existing contacts — use it for a salesperson's private phone.

6. Following and taking over conversations

Where: Conversations tab.



Everything that arrives, from every channel, shows up here. Click a conversation to read it all — including the text of voice messages.

- **To take over:** open the conversation and click **Take over**. Rebeca stops answering right away and the reply box appears for you.
- **To hand back:** click **Return to Rebeca** — she starts answering again.
- **Send to pipeline:** on the contact card strip, click **Send to pipeline** so the lead enters your CRM with the whole conversation.
- **Hand off to an area:** click **Hand off to an area**, choose the area and **Hand off now**. The person gets a summary and continues on their own WhatsApp.

When does Rebeca call a person on her own? Only when the customer asks to talk to someone. Even when it's marked as waiting for a human, she keeps answering until someone clicks **Take over** — the customer is never left in silence.

7. Frequently asked questions

Does she answer voice messages and photos? Yes. She listens to the audio and looks at the photo, and replies to the content.

Can I use a different WhatsApp from the one I already use? Yes. In **Channels** → **WhatsApp** → **Connect**, choose **Connect a dedicated number**. It's common to separate the number that sells from the number that does support.

Can I reply to an Instagram contact days later? Rebeca on her own can only reach the person up to 24 hours after their last message — it's Meta's rule, in any tool. If you **take over** the conversation, the window goes to 7 days. That's why she asks for a WhatsApp number or email during the chat.

Does she book visits on the calendar? No. Booking visits on your team's schedule is done by **Ava** (WhatsApp) and **Sérgio** (website). Rebeca passes the lead to your team to arrange it.

Can I pause Rebeca? Yes: uncheck **Rebeca active** on the Settings tab and save.

8. When something goes wrong

What happens	What to do
She doesn't answer on a channel	On Channels , check the card is connected. If it asks you to reconnect, click it and connect again.
The customer gets duplicate replies	Two assistants on the same channel (e.g. Rebeca and Sérgio on the website chat). Keep only one.
Two welcome messages in a row on WhatsApp	Turn off WhatsApp Business's Greeting message on the phone.
She says "I don't have that information"	It's missing from Catalog and prices or the files. Complete the Settings tab.
Nobody gets the lead alert	Fill in the WhatsApp in Who gets the lead alert .
The area's person doesn't get the lead	Their tag still says QR code not scanned yet : send the invite again.

Still have questions? In the full menu, use **Talk to the Director** — our team answers there. The [Academy and help](#) chapter shows the way.