



247ChatMate Agency Client Onboarding Guide

A simple guide for agencies setting up 247ChatMate for client websites. Written in plain English for fast setup and handover.

Start here

Use your own agency website first. Then use this guide when setting up a client. The client site must have the plugin installed before remote setup can be completed.

FOR WEB DESIGN AND DIGITAL AGENCIES

Turn ready-to-buy website visitors into WhatsApp leads.

247ChatMate opens at the right time, asks what the visitor needs, and helps save the lead before a long form loses them. Use it on your own agency website first, then offer it to clients.

- ✓ Your agency website is the live example.
- ✓ Start from 280+ pre-written business setups, then edit the buttons if needed.
- ✓ Once a visitor picks a button and enters a valid mobile number, the lead can be saved early.

[Apply for Agency Access](#) [Download Agency Pack](#)

Apply once and we'll send the agency setup pack, code steps and support details.

Live demo Try the agency widget
Choose Agency and click through the same lead flow clients will see.

Campaign category
Agency and Web Design

Business type
Agency

Choose the closest match. If yours isn't listed, use General — everything can be edited after setup.

Chat with us [Restart](#)

Choose what you need.

Client demo Agency access Website quote
SEO enquiry Pricing Something else

Powered by 247ChatMate Demo

After trying the demo, use the form below to request agency access and get the agency pack by email. The full setup library includes 280+ pre-written business setups.

Agency page and live demo example. Use this to show the agency route before client setup.

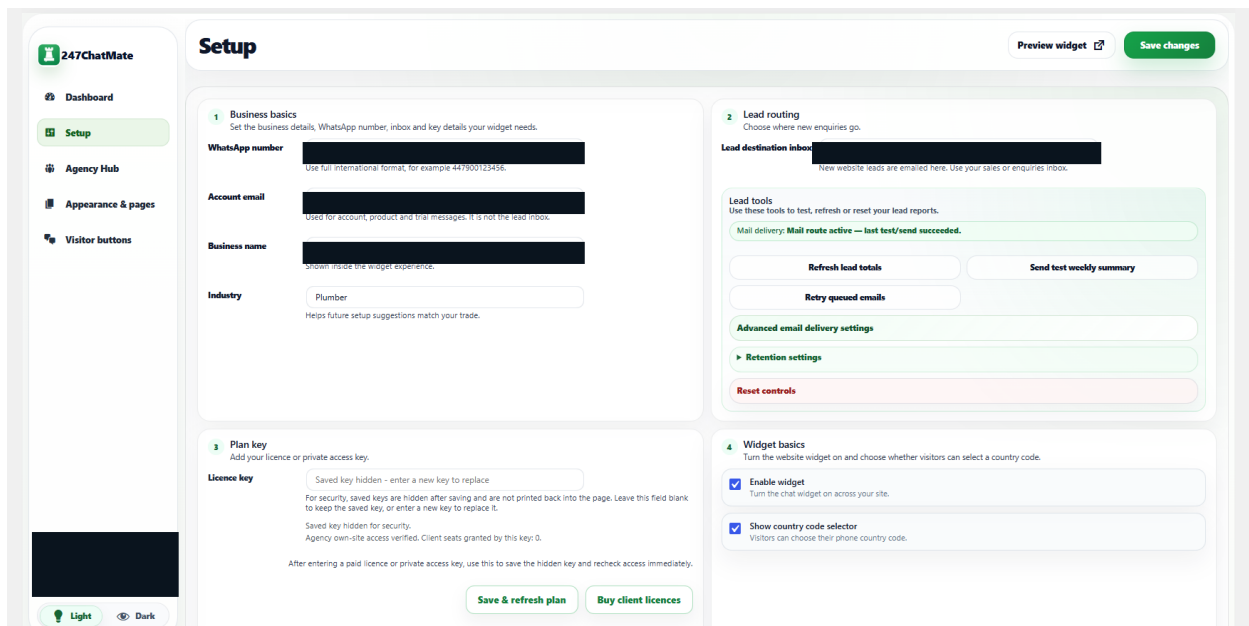


1. Install the plugin on the client site first

Before you can send setup to a client website, the 247ChatMate plugin must be installed on the client’s WordPress site.

Open the client site Setup page and generate the one-time setup code there. This code is then used inside Agency Hub.

- Install 247ChatMate on the client WordPress site.
- Open the 247ChatMate Setup page on that client site.
- Generate the one-time setup code.
- Copy the code and go back to Agency Hub.



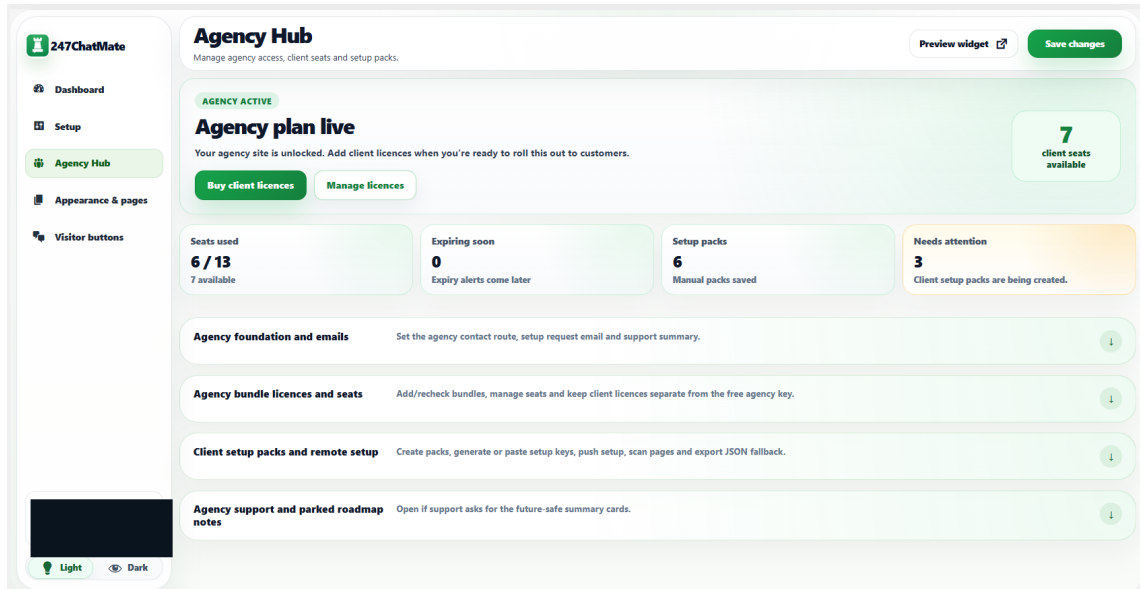
Client site Setup page. Sensitive details are redacted.



2. Start in Agency Hub

Agency Hub is where you manage client setup packs and client seats.

- Check the agency plan is active.
- Check available client seats.
- Open the client setup packs area.

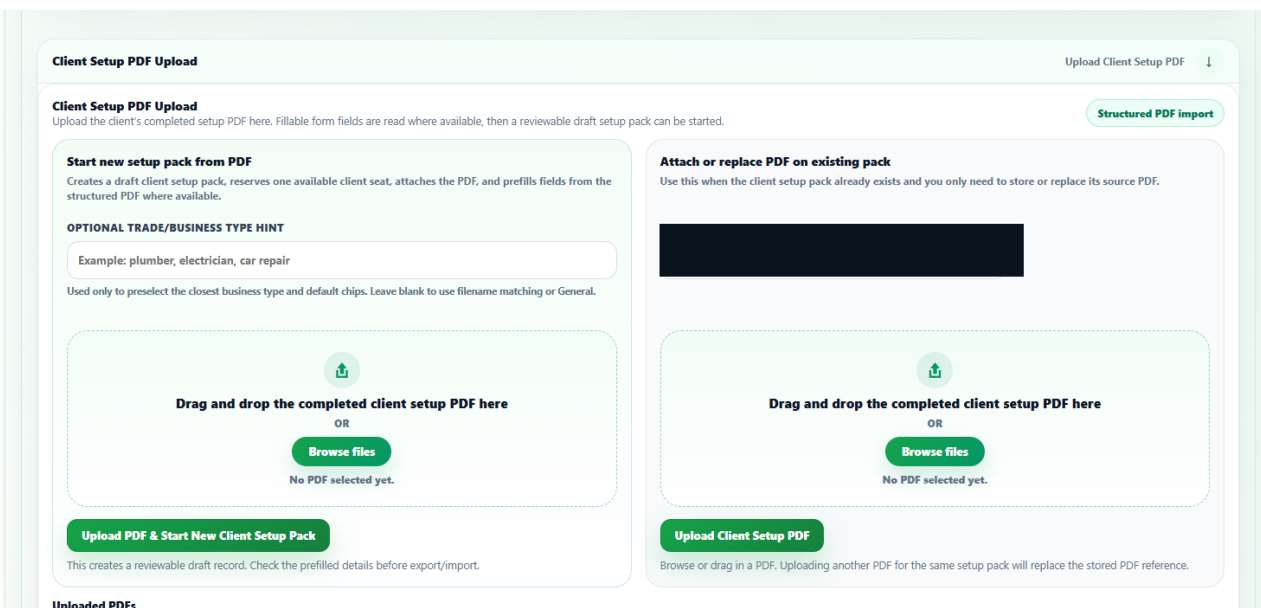


Agency Hub overview with personal details redacted.

3. Create or collect client details

There are two ways to collect client details. The PDF is best for new or interested clients. Manual entry is the fallback when you already have the details.

- Route 1: send the client setup PDF and ask the client to fill it in.
- Route 2: enter the details manually in Agency Hub.
- Do not block setup if the PDF is not returned.



Client PDF upload area. Use the PDF route when the client is new or ready to start.

4. Generate or check the one-time setup key

Use the one-time setup key so the agency can connect the saved setup to the installed client plugin.

- The code is temporary.
- Do not share it publicly.
- If it expires, generate a new one.

The screenshot shows a dashboard titled "Client setup packs and remote setup" with a subtitle "Create packs, generate or paste setup keys, push setup, scan pages and export JSON fallback." The main content area is labeled "CLIENT ONBOARDING" and "Client setup packs". It includes instructions: "Create manual setup packs for client sites. Export JSON stays as the fallback, and remote push can now send that same setup payload to an installed client plugin using a one-time setup key." There are three status buttons: "Manual entry active", "Export JSON ready", and "Remote push ready". Below this is a "Remote setup foundation" section with an "Expired" tag. The main focus is the "One-time agency setup key" card, which instructs to "Generate a temporary key so an agency can later connect this installed client plugin without needing WordPress admin passwords." The card displays a table of key details:

Status Expired	Key ID [REDACTED]	Created June 8, 2026 3:30 pm	Expires June 9, 2026 3:30 pm
Used Not used	Revoked Not revoked	Last remote import None yet	Last setup pack None yet

At the bottom of the card are two buttons: "Generate setup key" and "Revoke current key". A note at the very bottom states: "The agency can use an active one-time key to push a saved setup pack. After a successful import, the key is consumed and the client site remains the source of truth."

One-time agency setup key area. Private key details are redacted.

5. Add a client setup pack

Create the client setup pack inside Agency Hub. This stores the setup details before you send them to the client site.

- Client business name
- Client website/domain
- Client admin email
- WhatsApp mobile/cell number
- Lead email address



Add client setup pack Assign one available bundle seat and capture the details needed for the client-site setup JSON export. 7 seats available

1 Client details
These details feed the setup JSON that will be imported onto the end-user WordPress site.

Client business name **Client domain** **Client admin email** **WhatsApp mobile/cell number**

Client leads email

RS Remote sending & widget scope
Keep the sending controls in this client box. The selected pack sends the client's widget scope, visitor buttons and agency-managed status to the installed client plugin. Client site updated

Client widget scope

This reuses the existing frontend widget scope on the client site only.

Push setup to client site Sends the saved pack, widget scope and visitor buttons to the installed client plugin. 1

Client site updated.
The setup pack was imported and the one-time setup key was consumed.

To update this client again, generate a fresh one-time setup key on the client site, paste it below, then push setup again.

Open last push result details June 9, 2026 10:39 am — imported

Setup pack to send **Client domain** **Client one-time setup key**

Type the domain only. The HTTPS prefix is added automatically.

No WordPress admin login is used. The client plugin verifies the one-time key, imports locally, stores the audit payload, then consumes the key.

Manual client setup pack form. Use this when the PDF is not returned.

6. Push setup to the client site

Paste the one-time setup code from the client site, then push the setup from Agency Hub.

- Check the client domain.
- Paste the one-time setup code.
- Push setup.
- Check the result message.

Add client setup pack Assign one available bundle seat and capture the details needed for the client-site setup JSON export. 7 seats available

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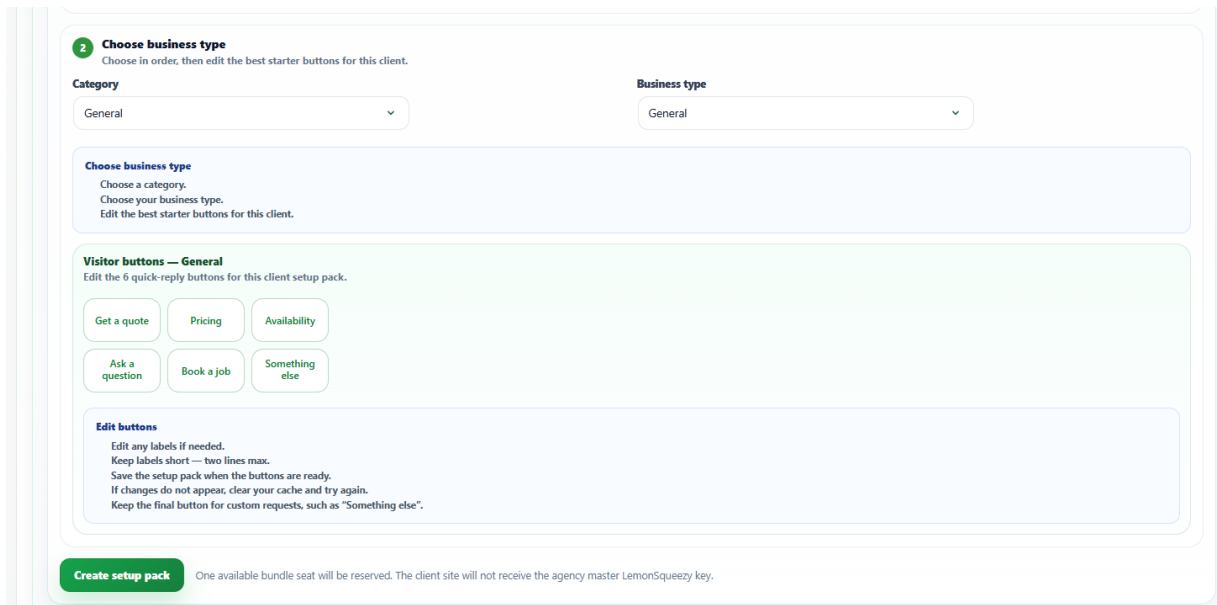
Push setup area shown inside the client setup pack. Private details are redacted.



7. Choose the closest business type

Choose the closest match for the client. This loads starter buttons that can be edited.

- Choose a category.
- Choose the business type.
- Edit the starter buttons if needed.
- Keep the final button for custom requests, such as “Something else”.

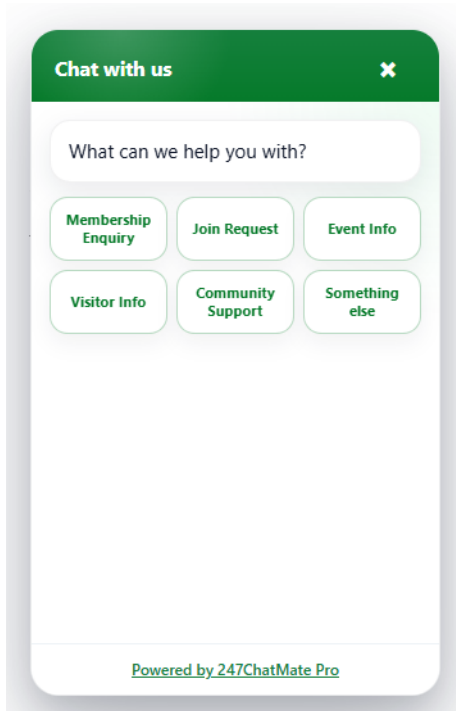


Client business type and visitor button setup.

8. Test the frontend widget

Open the client website and test the widget before launch.

- Check that the widget opens.
- Click a visitor button.
- Enter a test mobile/cell number.
- Continue to WhatsApp.

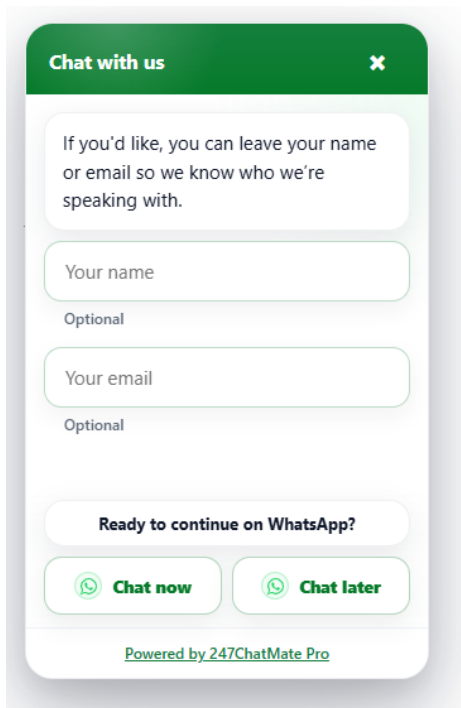


Frontend widget example.

9. Test the WhatsApp handoff

The client should understand how visitors move into WhatsApp.

- Check the contact step.
- Check the WhatsApp buttons.
- Make sure the wording feels clear and helpful.



WhatsApp handoff step.

10. Check the lead email

The lead email shows the client what was captured and gives them a fast reply route.

- Check the customer details.
- Check the suggested WhatsApp reply.
- Make sure phone numbers are readable on mobile.

The screenshot displays a mobile-optimized interface for a lead email. At the top, a green header reads "247ChatMate" and "New Plumber Lead Received". Below this, a "Lead Summary" section contains fields for Customer, Mobile number, WhatsApp-ready, and Email, with the latter two fields redacted. A "Suggested reply" button is visible. The "Customer Message" field is empty. A "Quick WhatsApp Message" section prompts the user to "Reply to this lead now" and provides options to copy the customer number or WhatsApp number, with the latter field redacted. A "Reply on WhatsApp" button is prominent. Below this, a "Suggested Reply" box contains a pre-written message: "Hi Adam, thanks for getting in touch. Could you send what you are interested in, whether you would like to visit, join, volunteer, or ask about an event, and the best way to contact you?". A "Lead Guidance" section lists three tips: "Leads are warmest within the first 5 minutes", "Prioritize urgent or problem-led enquiries first", and "Mobile visitors often convert faster after a quick WhatsApp reply". At the bottom, a "Lead Captured" status is shown as "Yes" and a "WhatsApp Status" is shown as "Completed". The footer includes the 247ChatMate logo and the tagline "Turning website visitors into WhatsApp leads".

Lead email example with contact details redacted.

11. Check the weekly summary

The weekly summary helps the client see what the website produced.

- Website chats opened
- Saved leads
- WhatsApp chats started
- WhatsApp conversion rate
- Phone leads saved



247CHATMATE WEEKLY SUMMARY
 247Ch: Website enquiries, widget opens and WhatsApp activity

Your website lead report

Here is what your website captured this w

Your website started 4 conversations and captured 0 leads.
 0 WhatsApp chats were started. WhatsApp conversion rate: 0%.

Leads this year	0
Leads this month	0
Leads this week	0
Website chats opened	4
WhatsApp chats started	0
WhatsApp conversion rate	0%
Leads emailed to inbox	0
Phone leads saved	0
Most recent lead	None recorded yet

PROGRESS SNAPSHOT

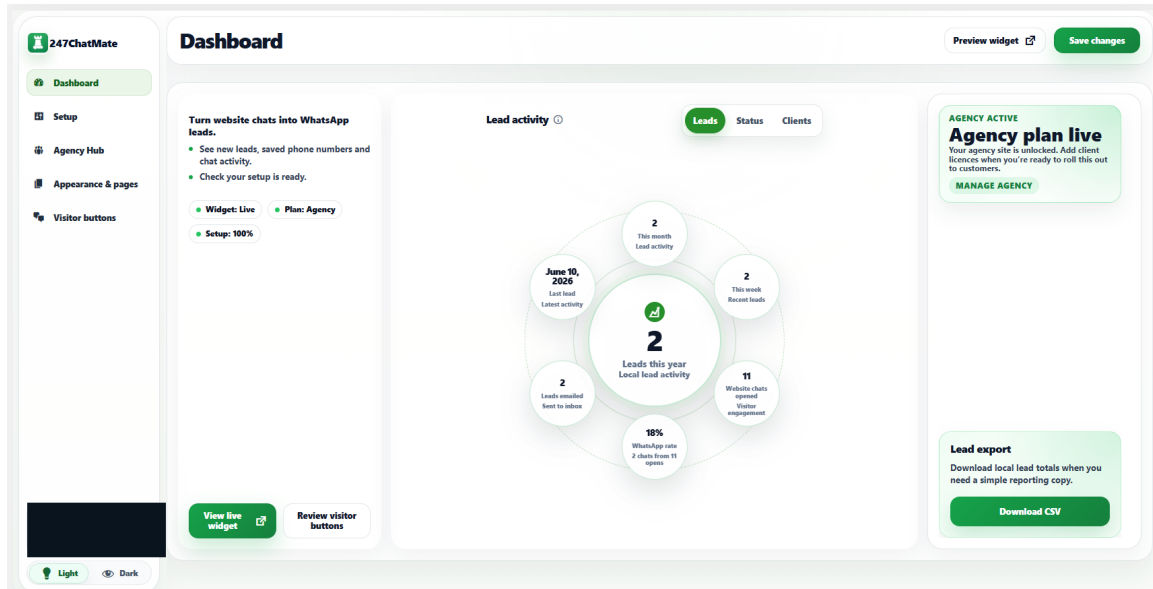
This week vs last week	Waiting for last week
This month vs last month	Waiting for last month

Weekly summary example with client details redacted.

12. Review the client dashboard

The dashboard gives a simple view of leads, status and client activity.

- Check lead activity.
- Check client status.
- Check that the agency plan is shown correctly.



Dashboard lead activity view.

13. Final launch checklist

Before launch, check each item below.

- Plugin is installed on the client site.
- WhatsApp mobile/cell number is saved.
- Lead email address is saved.
- Business type is selected.
- Visitor buttons look right.
- Widget appears on the website.
- WhatsApp opens correctly.
- Lead email arrives.
- Client knows where leads go.
- Client knows how to reply.

Simple handover wording

247ChatMate helps visitors contact you through WhatsApp. When someone clicks a button or enters their mobile number, the system helps save the lead so you can follow up. The most important thing is to reply quickly. Please keep WhatsApp and the lead inbox ready.