

# Agency Hub PDF Upload, Desktop Workflow, Licences & Client Ownership Guide

A practical agency guide for collecting client setup PDFs, uploading them into Agency Hub, reviewing extracted details, preparing the desktop lead-response workflow, managing licence seats and protecting agency-owned client relationships.

## Use this guide with agency setup packs

Send this guide to agency users alongside the agency client setup form, controlled beta checklist, lead-response setup guide and quick mobile setup card. It is written as an en-GB source document so later translations can keep the same structure, field meaning and route logic.

## What this guide covers

- How an agency collects the completed client setup PDF.
- How the completed PDF is uploaded and reviewed inside Agency Hub.
- How to work from a desktop or laptop so setup and testing are easier.
- How to install, test and hand over 247ChatMate for a client.
- How buying more licences and freeing up seats should work during beta and later account rollout.
- How client ownership is protected so agency-owned clients remain agency-owned.

## 1. Send the client setup form

Send the agency client setup form to the client and ask them to fill the green boxes only. The form is designed to collect the minimum setup details needed without turning onboarding into a long technical questionnaire.

- Business name and website/domain.
- Client contact name and main admin email.
- Leads Email where enquiry alerts and weekly summaries should arrive.
- WhatsApp mobile/cell number for customer conversations.
- Business type/category and country/language.
- Widget placement choice: homepage, all pages, or specific pages.
- Specific page URLs or paths where needed.
- Preferred visitor button labels or common customer questions.
- Google Business Profile, Instagram, Facebook or review links if useful later.
- Confirmation name and date.

**Important URL/path rule**

Page fields must use either the full URL or the path only. Accepted examples: <https://examplebusiness.co.uk/contact>, </contact>, </services/plumbing>. Do not write vague page names such as Contact page.

## 2. Receive and pre-check the completed PDF

When the client sends the completed PDF back, save a copy safely and do a quick pre-check before uploading it into Agency Hub.

- Check the website/domain is present and readable.
- Check the WhatsApp mobile/cell number is present.
- Check the Leads Email is present.
- Check the business type/category is clear enough to map to the right visitor buttons.
- Check the widget placement choice makes sense.
- Check any specific page entries are full URLs or paths starting with /.

**Do not guess unclear client data**

If a field is missing or unclear, ask the client to confirm it before setup. PDF extraction can help speed up setup, but the agency remains responsible for reviewing the details before using them.

### 3. Open Agency Hub and upload the PDF

Log in to the client WordPress site and open 247ChatMate -> Agency Hub. Use the PDF upload area to upload the completed client setup PDF.

<b>1</b>	<p>Open Agency Hub</p> <p>Use a desktop or laptop where possible. Keep the completed PDF available so you can compare it against the imported details.</p>
<b>2</b>	<p>Upload the completed PDF</p> <p>Drop or browse for the completed client setup PDF. Use the branded agency/client setup form where possible.</p>
<b>3</b>	<p>Create or populate a draft setup pack</p> <p>The upload should create or populate a draft client setup pack. This is a reviewable draft, not an automatic final setup.</p>
<b>4</b>	<p>Review before use</p> <p>Check all imported fields before saving, confirming, installing or handing over to the client.</p>

### 4. Review the imported setup details

After upload, review every imported field carefully. Correct anything that is missing, misread or not suitable for the client before continuing.

- Client business name.
- Website/domain.
- WhatsApp mobile/cell number.
- Leads Email.
- Business type/category.
- Country/language.
- Homepage, all pages or specific pages setting.
- Specific page URLs/paths.
- Visitor button labels and notes.
- Social/review links.
- Confirmation details.

#### Review step is mandatory

Do not assume PDF import has read every field perfectly. The agency should check the imported draft before using it for a live client setup.

### 5. Desktop setup workflow for agencies

Agency setup is easiest from a desktop or laptop. Keep the key tools open in separate tabs or windows so you can compare, configure and test without switching context constantly.

- WordPress admin for the client site.

- 247ChatMate Agency Hub.
- The completed client setup PDF.
- The client website frontend.
- The Leads Email inbox.
- WhatsApp Desktop or WhatsApp Web.
- The controlled beta setup checklist.

### **Why desktop matters**

A full desktop setup helps the agency check the PDF, configure the plugin, test the widget, confirm the lead email and verify WhatsApp handoff without missing a step.

## 6. Install, configure and test 247ChatMate

Once the setup pack is reviewed, configure the plugin and run the minimum live test before handing over to the client.

<b>1</b>	Install or update the plugin Use the approved 247ChatMate plugin zip from the public setup pack or the agreed agency build.
<b>2</b>	Save core setup fields Enter the WhatsApp mobile/cell number, Leads Email and business type/category. Save changes.
<b>3</b>	Confirm Visitor Buttons Check the suggested visitor buttons. Keep labels short - ideally two short lines.
<b>4</b>	Test the frontend widget Open the client website frontend, open the widget, click a visitor button and submit a test enquiry.
<b>5</b>	Test WhatsApp handoff Confirm WhatsApp opens with a useful message. The visitor still chooses whether to send the WhatsApp message.
<b>6</b>	Test lead email Confirm the lead email arrives in the Leads Email inbox and is readable on phone and desktop.
<b>7</b>	Test weekly summary Use the manual test weekly summary button where available and confirm the email arrives.

## 7. Client handover

After setup and testing, send the client the relevant handover resources and explain the simple operating rhythm.

- Quick mobile setup card.
- Lead-response setup guide.
- Confirmation that the widget is live.
- The Leads Email inbox where enquiries arrive.
- The WhatsApp mobile/cell number connected to the widget.
- What Phone leads saved means.
- What the weekly summary email means.
- How to report issues to the agency.

### Simple client message

247ChatMate helps start conversations from your website. Keep your lead inbox and WhatsApp ready so new enquiries are seen quickly. Fast replies help win the job.

## 8. Buying more client licences

Agency licence capacity controls how many client sites can be actively set up or managed under the agency arrangement. During beta, additional seats should be requested through the agreed 247ChatMate contact route. Later, this can move into a self-serve Agency Hub or account area.

- Request more licences before onboarding more clients than your current allocation allows.
- Keep one active licence/seat per active client website unless 247ChatMate confirms a different bundle rule.
- Do not reuse one client licence across multiple unrelated client websites.
- If you need a larger bundle, request a 3-site, 10-site or custom agency allocation where available.
- Keep agency-owned client records clearly separated from direct 247ChatMate customers.

#### **Beta rule for buying more seats**

Until self-serve seat purchasing is live, contact 247ChatMate to increase your agency allocation. The extra seats should then be added to your agency record before new client setups are treated as active.

## 9. Freeing up a licence seat

A seat can be freed up when a client is no longer active under the agency arrangement. The aim is to keep the system fair without making agencies pay for inactive sites forever.

- Confirm the client is no longer using the agency-managed 247ChatMate setup.
- Export or hand over any relevant client setup notes if needed.
- Remove, deactivate or disconnect the plugin from the old client site where appropriate.
- Mark the client as inactive, archived or revoked in your agency records or Agency Hub where available.
- Request the seat to be freed if seat freeing is still manual during beta.
- Only reuse the freed seat for a new client after the old client is genuinely inactive.

### Do not reuse an active client seat

A licence seat should not be reused while the previous client is still actively receiving the benefit of the agency-managed 247ChatMate setup. If in doubt, ask 247ChatMate support before reassigning the seat.

## 10. Agency client ownership promise

247ChatMate is designed to support agencies, not bypass them. If a client is introduced, set up or managed by an agency, that client remains agency-owned for the 247ChatMate relationship unless a clear exception is agreed.

- 247ChatMate will not deliberately poach agency-owned clients.
- 247ChatMate will not directly upsell agency-owned clients behind the agency relationship.
- Support, setup guidance and account conversations should normally go through the agency or be coordinated with the agency.
- If a client contacts 247ChatMate directly, the normal route is to refer the matter back through the agency where practical.
- If an agency lapses, stops servicing the client, or asks for a client to be released, a separate continuation route may be agreed.
- Any direct continuation route should protect the agency relationship and avoid surprise client poaching.

### Agency relationship rule

Agency-owned clients remain your clients. 247ChatMate will work through the agency wherever the client is agency-managed and will not use the setup-pack process as a route to bypass the agency.

## 11. Practical support boundaries

To keep the beta and agency rollout manageable, keep support practical and avoid collecting unnecessary sensitive data.

- Do not upload passwords into client setup PDFs.
- Do not put licence keys into client setup PDFs.
- Do not include unnecessary private customer information.
- Use temporary WordPress admin access where possible for done-for-you setup.
- Ask the client to delete or change access after setup if temporary access was provided.

- Keep client support messages simple and operational.

## 12. Translation and localisation notes

This document is the en-GB source version. Later translations should keep the same structure, section numbers and field meanings so the agency workflow remains consistent across countries.

- Translate visible guidance text only.
- Keep product names, filenames, route parameters and manifest keys unchanged unless the locale manifest says otherwise.
- Keep URL/path examples structurally identical.
- Keep WhatsApp, Agency Hub, Leads Email and 247ChatMate terms consistent across translated packs.
- Keep client ownership wording strong and agency-protective in every language.

### Source of truth

Use this en-GB version as the translation source. Add future translated files under `/downloads/{locale}/agency/` without overwriting the English file.