



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.

The image shows two side-by-side screenshots. The left screenshot is a landing page for agencies, titled 'FOR WEB DESIGN AND DIGITAL AGENCIES' and 'Turn ready-to-buy website visitors into WhatsApp leads.' It includes a sub-headline: '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.' Below this are three bullet points with checkmarks: 'Your agency website is the live example.', 'Start from 280+ pre-written business setups, then edit the buttons if needed.', and 'Once a visitor picks a button and enters a valid mobile number, the lead can be saved early.' At the bottom are two buttons: 'Apply for Agency Access' and 'Download Agency Pack', with a note: 'Apply once and we'll send the agency setup pack, code steps and support details.'

The right screenshot is a live demo of the agency widget. It features a 'Live demo' button and a 'Try the agency widget' instruction: 'Choose Agency and click through the same lead flow clients will see.' Below are two dropdown menus: 'Campaign category' set to 'Agency and Web Design' and 'Business type' set to 'Agency'. A note says: 'Choose the closest match. If yours isn't listed, use General — everything can be edited after setup.' A 'Chat with us' button is visible, and below it are several buttons for lead capture: 'Client demo', 'Agency access', 'Website quote', 'SEO enquiry', 'Pricing', and 'Something else'. At the bottom, it says 'Powered by 247ChatMate Demo' and a small note: '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.

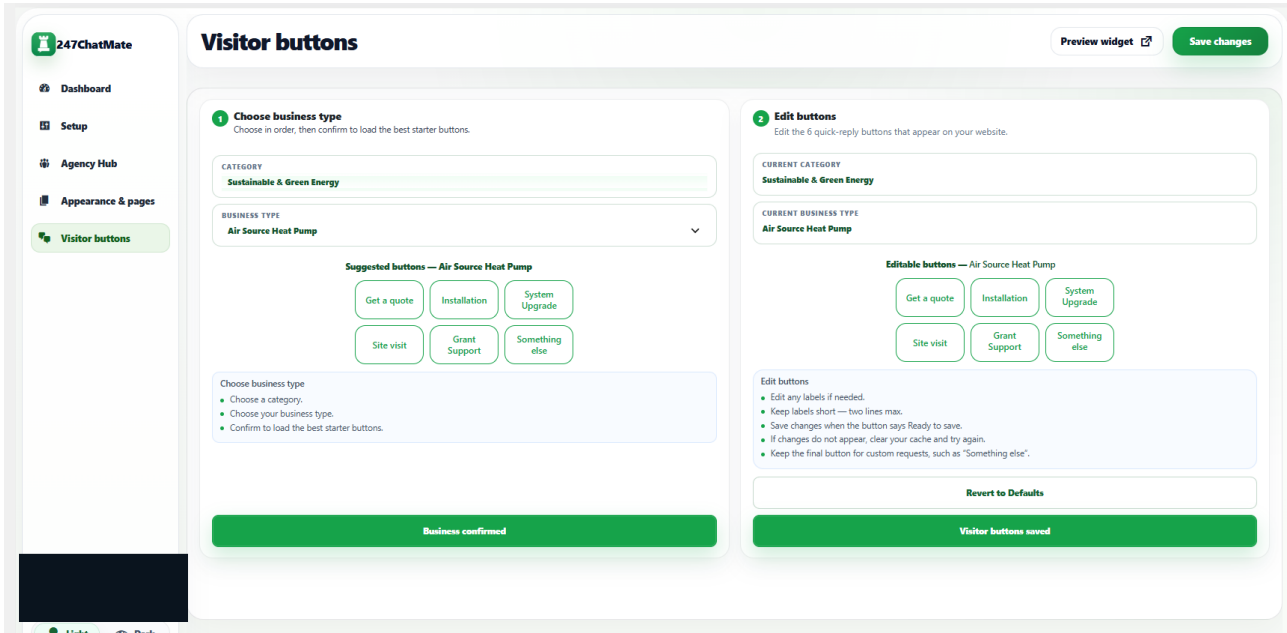
Client site Setup page. Sensitive details are redacted.



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.



Agency Hub
Manage agency access, client seats and setup packs.

AGENCY ACTIVE
Agency plan live
Your agency site is unlocked. Add client licences when you're ready

7 client seats available

Buy client licences **Manage licences**

Seats used 6 / 13 7 available	Expiring soon 0 Expiry alerts come later	Setup packs 6 Manual packs saved	Needs attention 3 Client setup packs are being created.
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- Agency foundation and emails** - Set the agency contact route, setup request email and support summary.
- Agency bundle licences and seats** - Add/recheck bundles, manage seats and keep client licences separate from the free agency key.
- Client setup packs and remote setup** - Create packs, generate or paste setup keys, push setup, scan pages and export JSON fallback.
- Agency support and parked roadmap notes** - Open if support asks for the future-safe summary cards.

Agency Plan
Adams Plumbing

Light Dark

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

4. 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

The screenshot shows the 'Setup' page in the 247ChatMate Agency Hub. The page is divided into four main sections:

- 1 Business basics:** Includes fields for WhatsApp number (447900934628), Account email (adamcollins61@gmail.com), Business name (Adams Plumbing), and Industry (Plumber).
- 2 Lead routing:** Includes a field for Lead destination inbox (adamcollins61@gmail.com) and buttons for Refresh lead totals, Send test weekly summary, and Retry queued emails.
- 3 Plan key:** Includes a field for Licence key and buttons for Save & refresh plan and Buy client licences.
- 4 Widget basics:** Includes checkboxes for Enable widget and Show country code selector.

The page also features a sidebar with navigation options like Dashboard, Setup, Agency Hub, Appearance & pages, and Visitor buttons. At the bottom, there are buttons for Light and Dark themes.

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

5. 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.



Client setup packs and remote setup Create packs, generate or paste setup keys, push setup, scan pages and export JSON fallback.

CLIENT ONBOARDING

Client setup packs Manual entry active Export JSON ready Remote push ready

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.

Remote setup foundation Expired

One-time agency setup key

Generate a temporary key so an agency can later connect this installed client plugin without needing WordPress admin passwords.

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

[REDACTED]

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.

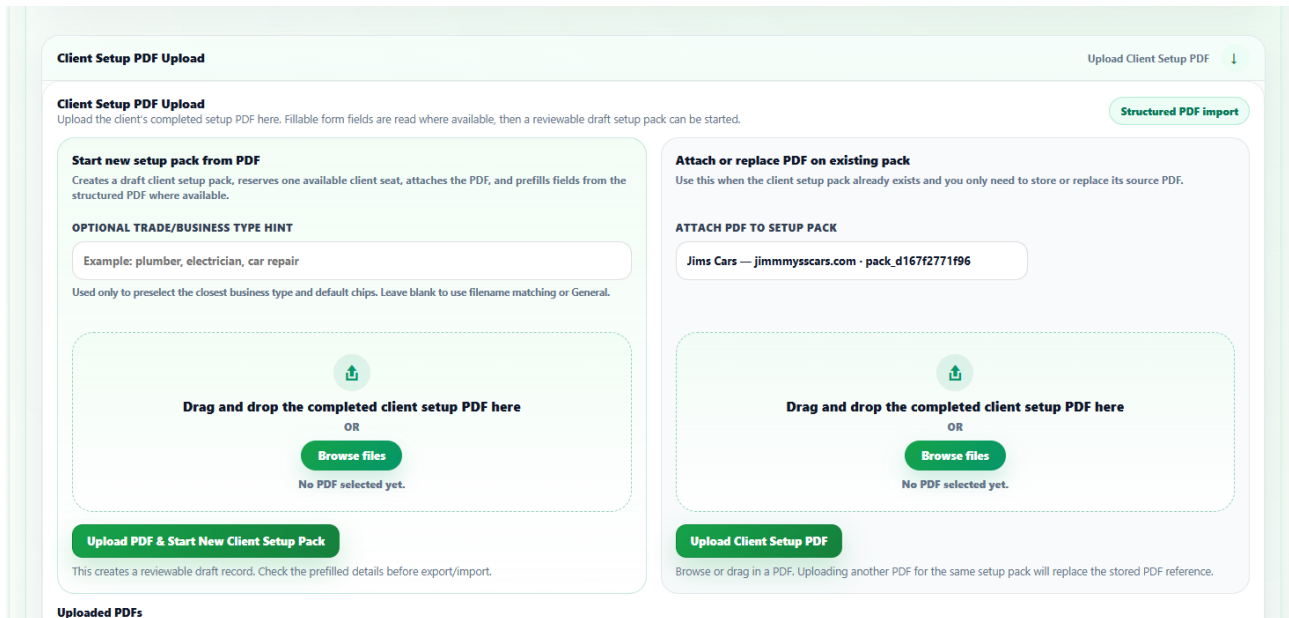
Push setup area. Codes and private details are redacted.



6. 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.

7. 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.



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 e.g. ABC Plumbing **Client domain** e.g. abcplumbing.co.uk **Client admin email** e.g. admin@client.co.uk **WhatsApp mobile/cell number** e.g. 447900123456

Client leads email e.g. enquiries@client.co.uk

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 All pages

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. i

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

Refresh result Prepare update Open client Setup Open client website

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 247Chatmate — 247chatmate.com · pack_09459105badf **Client domain** [https:// www.247chatmate.com](https://www.247chatmate.com) **Client one-time setup key** Paste key from client plugin

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

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

Frontend widget example.

8. 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.

2 Choose business type Choose in order, then edit the best starter buttons for this client.

Category General **Business type** General

Choose business type Choose a category. Choose your business type. Edit the best starter buttons for this client.

Visitor buttons — General Edit the 6 quick-reply buttons for this client setup pack.

Get a quote Pricing Availability

Ask a question Book a job Something else

Edit buttons Edit any labels if needed. Keep labels short — two lines max. Save the setup pack when the buttons are ready. If changes do not appear, clear your cache and try again. Keep the final button for custom requests, such as "Something else".

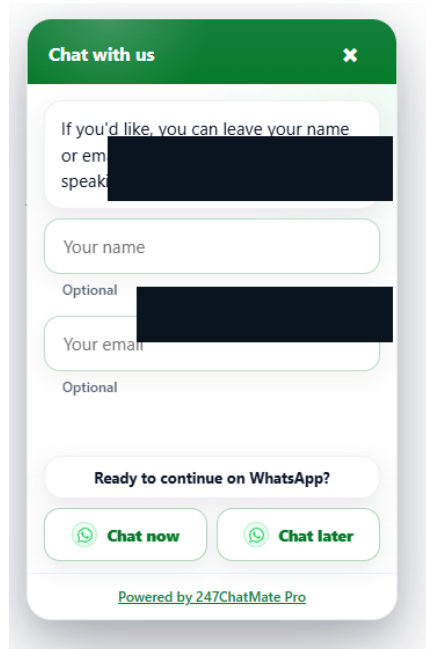
Create setup pack One available bundle seat will be reserved. The client site will not receive the agency master LemonSqueezy key.

WhatsApp handoff step.

9. 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.

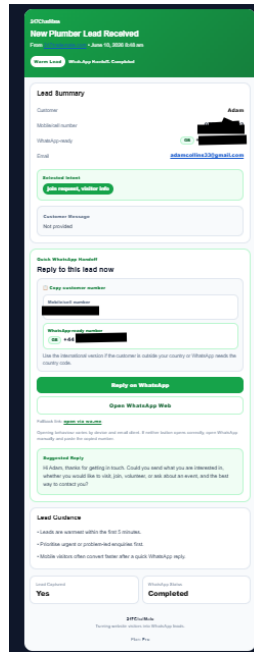


Lead email example with contact details redacted.

10. 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

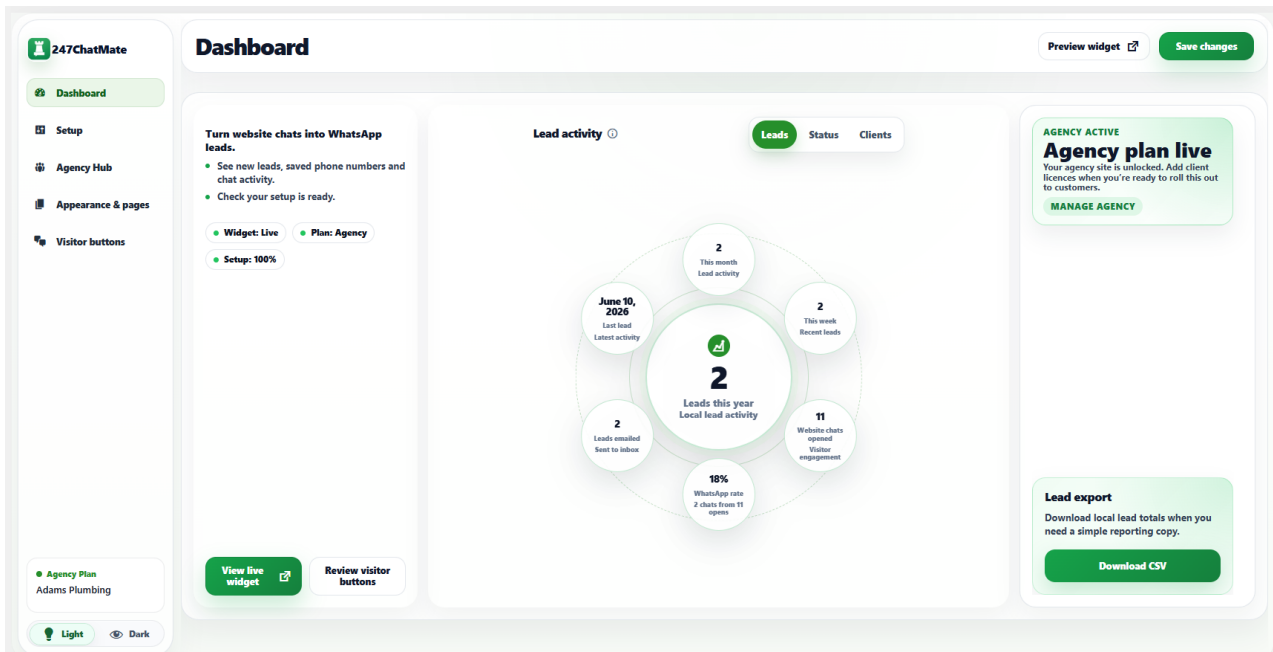


Weekly summary example with client details redacted.

11. 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.

12. 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.