



Client Setup Information Form

Complete the green fields so the setup pack can be prepared.

1. Business and contact details

These details identify the client site, lead inbox and WhatsApp number. Use a desktop or laptop where possible.

Fill in the green boxes only. The agency will review anything unclear before installation. Page fields should use the full URL or the path only, for example <https://examplebusiness.co.uk/contact> or </contact>.

Business name (required)

Trading name shown to customers.

Client contact name (required)

Person completing this form.

Leads email (required)

Where enquiry alerts and summaries should go.

Business type/category (required)

Example: Plumber, Estate Agent, Dental Practice.

Website / domain (required)

Example: <https://examplebusiness.co.uk>

Main admin email (required)

Used for setup/account messages.

WhatsApp mobile/cell number (required)

Mobile/cell number only. Use international format if known.

Country / language (optional)

Optional. Example: UK / English.



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Page placement and strict URL/path rules.

2. Where should the widget appear?

Choose one placement option. If using specific pages, fill the green page list below.

Homepage only

All pages

Specific pages listed below

Specific pages must be a full URL or a path starting with /. Accepted examples: /contact, /book-a-quote, https://examplebusiness.co.uk/services. Do not write vague names such as Contact page.

3. Specific pages

Use one green row per page. Leave blank unless you chose specific pages.

Page 1 (optional)

Accepted: full URL or /page-name

Page 2 (optional)

Accepted: full URL or /page-name

Page 3 (optional)

Accepted: full URL or /page-name

Page 4 (optional)

Accepted: full URL or /page-name

Page 5 (optional)

Accepted: full URL or /page-name

Page 6 (optional)

Accepted: full URL or /page-name

Page 7 (optional)

Accepted: full URL or /page-name

Page 8 (optional)

Accepted: full URL or /page-name



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Visitor buttons and common customer questions.

4. Visitor buttons

Most clients can leave this page blank.

The enquiry buttons have already been selected for your industry. When the widget is live, check the buttons on your website and ask your agency to change any wording afterwards if needed. The final Something else option should stay available so visitors can send a custom enquiry.

Only use the green box below if you already know a specific wording change, common question or enquiry route you want the agency to consider.

Requested changes or enquiry notes (optional)

Examples: change Pricing to Costs, add Emergency booking, ask about availability, or leave as suggested. Do not remove the final Something else route unless the agency confirms it is safe.

Common customer questions (optional)

Use this only if customers regularly ask the same questions before buying or booking.



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Optional links, notes and confirmation.

5. Optional social, review and directory links

Add links only if you want them included later in directory, handover or support assets.

Google Business Profile link (optional)

Instagram link (optional)

Facebook link (optional)

Review link (optional)

6. Notes and confirmation

Please confirm the setup details are correct before returning the form.

Anything else the agency should know (optional)

I confirm these details are correct for setup.

Confirmed by (required)

Date (required)