



Controlled Beta Setup Checklist

Install, set up and test 247ChatMate in real business conditions without technical confusion.

Beta onboarding checklist

Who this is for

- A small business owner testing 247ChatMate on their own website
- An agency setting up 247ChatMate for a client
- Internal QA before wider beta release

Before you start

- Use a WordPress site where you are allowed to install plugins.
- Have the business WhatsApp mobile/cell number ready.
- Have the lead destination email ready.
- Use a desktop or laptop for plugin setup where possible.
- Test the final lead email on a phone as well.

Setup and test checklist

1. Install and activate

- Upload the latest 247ChatMate plugin zip.
- Activate the plugin.
- Confirm the 247ChatMate admin page opens.
- Confirm there are no WordPress fatal errors.
- Confirm the dashboard loads.

2. Basic setup

- Enter the WhatsApp mobile/cell number.

- Enter the Leads Email address where website leads should be sent.
- Save changes.
- Confirm the page stays on the same section and shows a saved confirmation.
- Confirm the lead destination wording is clear.

3. Visitor Buttons setup

- Open Visitor Buttons.
- Choose the closest business type/category.
- Confirm the starter visitor buttons load.
- Edit labels only if needed.
- Keep each label short enough to fit on two lines.
- Leave the final custom/Other-style button available.
- Save changes and confirm the chips still look clean.

4. Frontend widget test

- Open the website frontend in a normal browser window.
- Confirm the widget appears.
- Open the widget manually.
- Confirm the chip buttons display correctly.
- Click a chip and enter a valid mobile/cell number.
- Enter name/email/message if wanted.
- Complete the WhatsApp handoff.
- Confirm WhatsApp opens with the suggested message.

5. Lead email test

- Check the Leads Email inbox.
- Confirm the business receives the lead email.
- Confirm name, phone, email, intent and message are shown where provided.
- Confirm the suggested WhatsApp reply is useful.
- Open the email on a phone and confirm phone numbers are readable and easy to copy/paste.

6. Phone-lead rescue test

- Open the widget again.
- Enter a valid mobile/cell number.
- Do not complete the WhatsApp handoff.
- Wait around 45 seconds.
- Confirm a phone lead email is sent.
- Confirm the wording is helpful and not creepy.

7. Weekly summary test

- Use the manual Send test weekly summary button if available.
- Confirm the weekly summary arrives in the Leads Email inbox.
- Check wording for Website chats opened, WhatsApp chats started, WhatsApp conversion rate and Phone leads saved.
- If there is not enough comparison data, confirm it says Waiting for last week or Waiting for last month.

8. Dashboard/admin test

- Click Dashboard, Setup, Appearance & pages and Visitor Buttons.
- Click the side navigation quickly several times.
- Confirm the admin does not freeze.
- Check light and dark mode if available.
- Confirm Visitor Buttons and chips still look unchanged.
- Confirm the dashboard is readable and professional enough for a normal business owner.



Recommended lead-response setup

Phone and desktop

- WhatsApp Desktop on PC or laptop
- Leads Email inbox on phone
- Notifications turned on

Shortcuts and habits

- Lead inbox saved or pinned on phone
- Lead-response shortcut saved when available
- Normal process for replying quickly

Feedback to send

Ask the tester to report

- Did the plugin install without confusion?
- Did the admin page make sense?
- Did they know where leads go?
- Did the widget appear on the website?
- Did WhatsApp open correctly?
- Did the lead email arrive?
- Was the email easy to understand on mobile?
- Did any page freeze, jump or feel broken?
- Were any words confusing?
- What would stop them paying for this?

Pass criteria

- Plugin activates.
- Dashboard loads.
- WhatsApp number and Leads Email save.
- Visitor Buttons/chips display correctly.
- Frontend widget works.
- Full lead email arrives.
- Phone-lead rescue works.
- Weekly summary test email renders clearly.
- Admin side navigation no longer freezes.
- No obvious beta-blocking visual or functional issue appears.