



Lead-Response Setup Guide

Set up WhatsApp, lead email and phone shortcuts so new website enquiries are seen quickly.

Agency / client onboarding guide

What this guide helps you do

247ChatMate can create more website enquiries, but the business still needs a simple response setup. Use this guide to make sure leads arrive in the right place and are answered quickly.

- Best for: agencies, installers and business owners
- Estimated time: 15-25 minutes
- Main outcome: WhatsApp and lead email are ready before real enquiries arrive

Recommended setup

1

Install WhatsApp Desktop

Why: Leads can be answered faster from a keyboard, and staff do not have to rely only on one phone.

- Install WhatsApp Desktop on the main office PC or laptop.
- Link the business WhatsApp mobile/cell number.
- Send and receive one test message from the computer.

2

Set up the lead inbox

Why: 247ChatMate sends website lead emails to the Leads Email inbox. This inbox needs to be easy to see.

- Add the Leads Email inbox to Gmail, Outlook or the client's normal email app.
- Add the same inbox to the phone if possible.
- Turn on notifications.
- Confirm a test lead email arrives.

3

Add a phone home-screen shortcut

Why: Less friction means faster replies and more chances to win work.

- Save the lead inbox or lead-response page to the phone home screen.
- Put the shortcut somewhere obvious.
- Test opening it from the phone.

4

Save the lead-response page when available

Why: This gives the business a quick place to copy numbers, open WhatsApp and follow up.

- Open the lead-response or missed-call page on the phone.
- Add it to the home screen.
- Test it after one dummy lead.

5

Create a simple lead-response habit

Why: The product helps start conversations. The business still needs someone to reply.

- Choose one person to own first response.
- Check new leads as soon as possible.
- Follow up phone leads politely and naturally.
- Avoid pushy or creepy wording.

Suggested WhatsApp follow-up

Hi, this is [Business]. Just checking if you still need help with [enquiry]. Happy to help whenever suits. Keep it short, polite and useful. Do not say the visitor was watched, tracked or abandoned the form.

Agency handover checklist

Client details

- Client business name recorded
- Website/domain confirmed
- WhatsApp mobile/cell number saved
- Leads Email inbox saved

Plugin setup

- Plugin installed and activated
- Business type selected
- Visitor Buttons checked
- Final custom/Other button left available

Lead testing

- Test lead completed
- Lead email received
- WhatsApp handoff tested
- Phone-lead rescue tested if practical

Client shown

- Where leads arrive
- How to reply from WhatsApp
- What "Phone leads saved" means
- How to read the weekly summary

Client handover wording

247ChatMate helps start conversations from your website. When someone clicks a button, opens

WhatsApp or enters a mobile number, the system helps you follow up faster.

The most important thing is to keep your lead inbox and WhatsApp ready, so new enquiries are seen quickly.

Keep the setup simple

- One WhatsApp number
- One lead inbox
- Clear visitor buttons
- A simple follow-up habit
- Weekly summary visibility