

OFFICIAL GUIDE · VERSION 1.22.14

Set up ZifChat with confidence.

From your first WhatsApp number to AI knowledge and human handoff, this is the complete setup reference for ZifChat Free and Pro.

Your route to launch

1. Install the one ZifChat plugin
2. Run the five-step setup wizard
3. Customize your chat and team
4. Activate a license for Pro
5. Connect AI and test handoff

GET STARTED

Install once, then follow the wizard.

ZifChat Free and Pro use the same plugin. Start with the Free download; entering a valid Pro license unlocks the premium controls and capabilities already present in it.

01 · Install**02 · Open Setup Wizard**

In WordPress go to Plugins → Add New → Upload Plugin. Choose the ZifChat ZIP, install and activate it.

Use ZifChat → Setup Wizard. The five stages are Business, WhatsApp, Greeting, Hours and Finish.

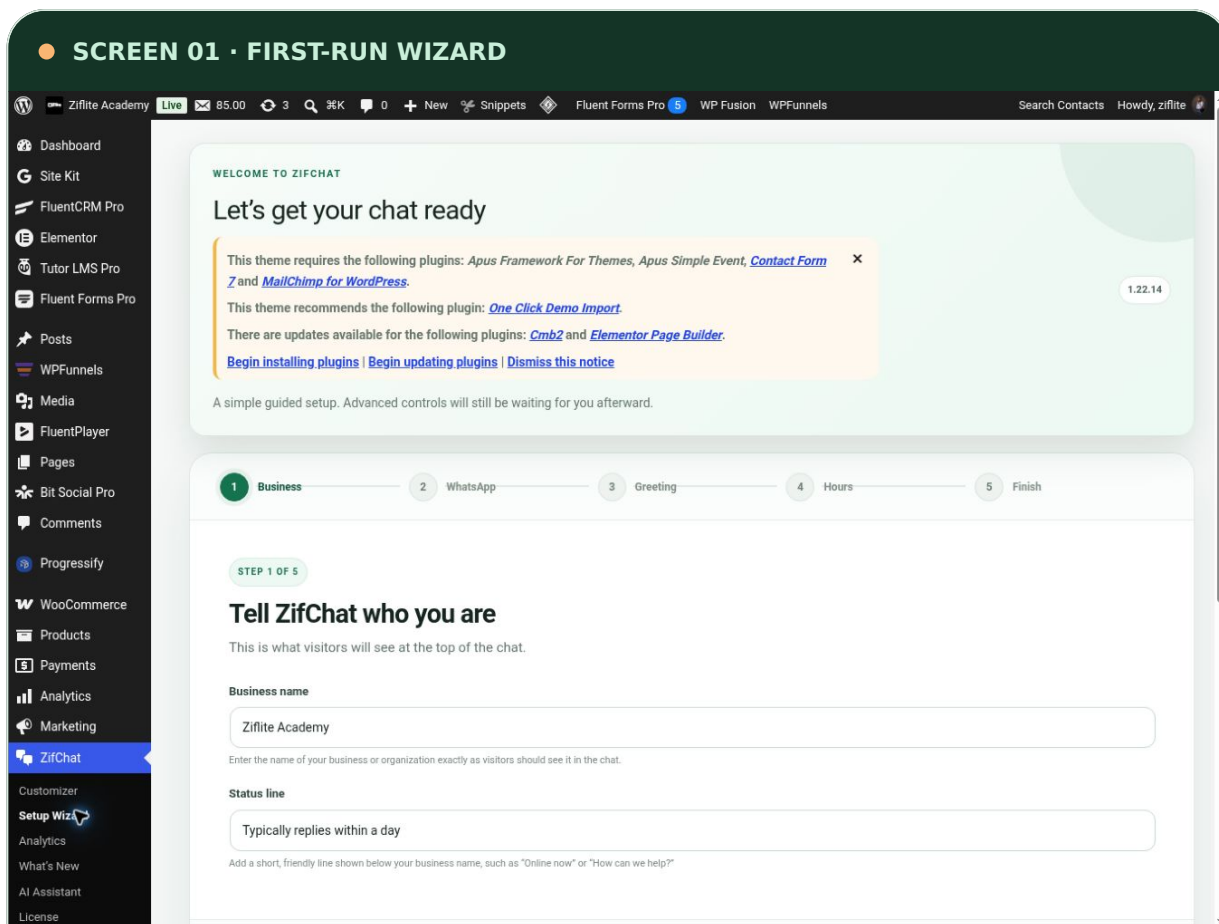
03 · Enter the essentials

Add your public business name, response/status line, international-format WhatsApp number, greeting and operating hours.

04 · Finish and verify

Complete the wizard, visit a public page on desktop and mobile, then check the launcher and destination.

Requirements in the package: WordPress 6.0+ and PHP 7.4+. Back up a production site before installing or updating.



The first step sets the identity visitors see. Continue through the numbered stages, then finish to save.

ONE PLUGIN · TWO ENTITLEMENTS

What the license unlocks.

Free is a useful WhatsApp chat experience. A valid license enables Pro in the same installation; there is no separate Pro add-on to install and no need to remove the Free plugin.

Feature	Free	Pro with active license
Chat launcher, greeting, colors, quick replies, text size	✓	✓

Feature	Free	Pro with active license
Agents	Up to 2	Unlimited
General hours and basic analytics	✓	✓
Agent-specific hours, advanced context and page rules	—	✓
Premium launcher icons, advanced visibility and WooCommerce CTA	—	✓
AI, knowledge entries, website crawler and PDF import	—	✓
AI/human handoff, advanced analytics and WordPress Abilities/MCP	—	✓
Remove “Powered by ZifChat”	—	✓

Free users may see a premium control with a Pro label. That control is locked until a license is activated. Settings already saved are preserved if a Pro license is later deactivated.

CUSTOMIZER

Make the chat look and sound like your business.

Open **ZifChat** → **Customizer**. The right-hand live preview shows branding and launcher choices. The public widget changes after you select **Save & publish changes**.

Core chat

- **Enable ZifChat** controls whether the launcher appears.
- **Default WhatsApp number** is the fallback when nobody selects an agent. Include country code without a plus sign or spaces.
- **Business name, status line and greeting** are displayed to visitors.
- **Widget color, header color and chat text size** set the presentation. Text size is available in Free and Pro.

Quick replies

Add short, common prompts such as “Ask about pricing” or “Get support.” Use + **Add quick reply** and remove entries you no longer need. Save the form after editing.

The screenshot displays the 'SCREEN 02 · QUICK REPLIES & TEAM' configuration page. On the left is a sidebar menu with options like Payments, Analytics, Marketing, ZifChat, Customizer, and various plugins. The main content area is divided into three sections: 1. 'Quick replies' with a text size slider set to 14px and three pre-defined replies ('Ask about pricing', 'Get support', 'Request a quote') each with a 'Remove' button, plus an '+ Add quick reply' button. 2. 'Agents & departments' with a form for adding an agent (Name: Obi Matthew, Department: Sales, WhatsApp number: 2349012983674) and a section for setting custom hours (Mon-Fri checked). 3. A 'LIVE PREVIEW' on the right showing the chat widget as it appears on the website, including the business name 'Ziflite Academy' and a sample message.

What you are seeing: quick-reply fields on the left, an agent card beneath, and the live preview on the right.

1 Quick replies: add or remove the visitor shortcuts.

2 Agent card: name, department, number and status.

3 Custom hours: Pro schedule for this agent.

4 Live preview: visual guide before publishing.

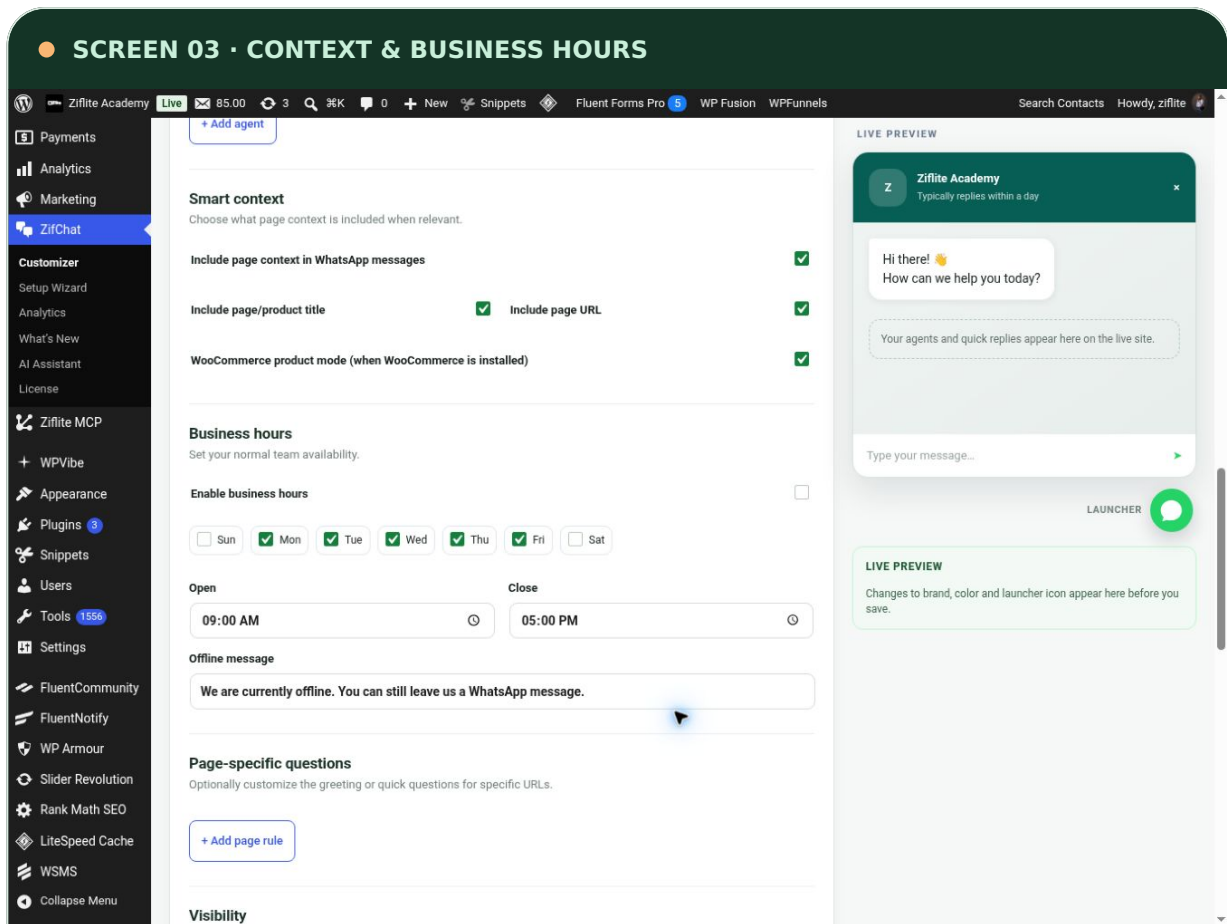
ROUTING

Send visitors to the right person.

Under **Agents & departments**, enter an agent name, department, WhatsApp number and optional photo. Add another with **+ Add agent**. Free supports two; Pro removes that limit. If a visitor selects an agent, ZifChat uses that route. The default number is the fallback.

Availability and hours

In **Business hours**, enable the schedule, choose weekdays, opening and closing time, and write an offline message. Agents normally inherit those general hours. In Pro, **Use custom hours for this agent** lets you choose separate days and times. Verify your WordPress timezone under Settings → General before relying on the schedule.



General business hours apply to the team unless an agent's Pro schedule is enabled.

1 Smart context: page and product details in WhatsApp.

2 Business hours: days and opening/closing times.

3 Offline message: what visitors see after hours.

4 Page rule: tailored questions on matching URLs.

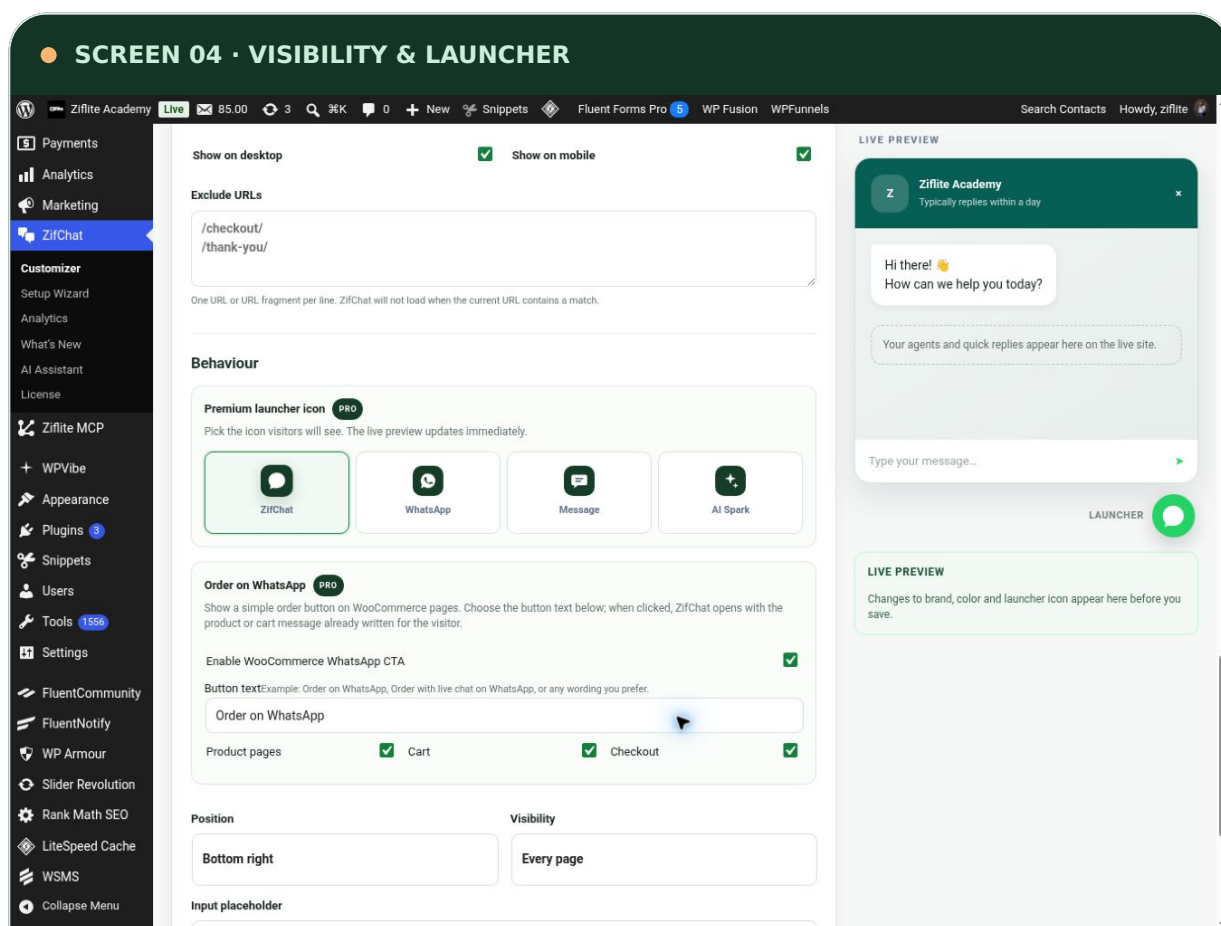
PRO CONTROLS

Choose where and how the widget appears.

Smart context can include a page/product title and URL in a prepared WhatsApp message. **Page-specific questions** can tailor the greeting or

quick questions for particular URLs. In **Visibility**, choose desktop/mobile display and list URL fragments to exclude, one per line.

Behaviour provides the launcher icons ZifChat, WhatsApp, Message and AI Spark; bottom-left or bottom-right position; every page or front page only; input placeholder; message prefix; and Pro control over the “Powered by ZifChat” line.



Visible controls include URL exclusions, four icon styles, WooCommerce CTA destinations and the live preview.

A URL in Exclude URLs prevents the widget loading on a matching page. If you want a WooCommerce CTA on checkout, do not also exclude the checkout URL. The example test site has both selected; treat it as an example of a configuration to review, not a recommended setup.

Connect your preferred AI provider.

Go to **ZifChat → AI Assistant**. Turn on **Use AI before the normal agent handoff**, choose an assistant name, then select a provider. The screen offers **OpenAI, Google Gemini, Anthropic Claude, Mistral AI and DeepSeek**.

1. Create an API key in your chosen provider account and paste it into **Provider API key**. ZifChat says it stores the key server-side, away from visitors.
2. Choose a recommended model or use **Custom model ID** if your provider supports the exact model identifier. The OpenAI menu currently shows GPT-5.6 Luna, Terra and Sol. Model offerings can change; the dropdown and your provider account are authoritative. A name such as “GPT-6” is not automatically supported just because it can be typed.
3. Select **Test AI connection**, review the result, add knowledge and instructions, then **Save AI settings**.
4. Ask controlled test questions on the public site and check both an answer and a human handoff.

Your AI provider bills API usage separately from the ZifChat license. Never put an API key in a screenshot, knowledge document or support message.

SCREEN 05 · AI CONNECTION

This theme requires the following plugins: [Apus Framework For Themes](#), [Apus Simple Event](#), [Contact Form 7](#) and [MailChimp for WordPress](#).
 This theme recommends the following plugin: [One Click Demo Import](#).
 There are updates available for the following plugins: [Cmb2](#) and [Elementor Page Builder](#).
[Begin installing plugins](#) | [Begin updating plugins](#) | [Dismiss this notice](#)

AI RECEPTIONIST

ZifChat AI Assistant PRO AI disabled

Choose the AI provider, teach it about your business, and control human handoff.

1 Connect AI 2 Add knowledge 3 Set behaviour 4 Human handoff

☐ Enable AI Assistant ☐ Use AI before the normal agent handoff

Assistant name

AI provider PRO OpenAI Choose your provider. Your API key is used securely from WordPress.

Provider API key Stored server-side and never shown to visitors.

Model gpt-5.6-luna Choose a recommended model, or use a custom model ID.

[Test AI connection](#)

The provider and model are separate choices; test the connection before relying on public answers.

1 Enable AI and name the assistant.

2 Select one of five providers.

3 Paste the matching provider API key.

4 Pick a model and test the connection.

PRO · KNOWLEDGE

Teach the assistant your approved facts.

Business information is for a concise general summary. The **Knowledge Base** organizes facts into individual entries. Use **+ Add knowledge** for manual topics such as services, hours, policies and frequently asked questions.

Import one page

Enter a public URL and select Import page. Review the extracted information.

Discover a site

Enter a public website and select Discover site, then choose relevant pages to import.

Import PDF

Choose a text-based PDF and select Import PDF. Scanned images without selectable text may not extract well.

Write AI instructions

Set tone, limits and handoff triggers. Tell AI to say when it does not know, and never invent prices or policies.

Keep knowledge current. Remove stale prices, check imported page content, and avoid customer-specific private data. Visitors can always choose **Talk to a human**; the existing agent availability and WhatsApp routing still determine the destination. The package also describes a conversation summary for handoff.

● SCREEN 06 · KNOWLEDGE SOURCES

WordPress

Ziflite Academy

Live

85.00

3

🔍

🌐

0

+

New

📄

Snippets

Fluent Forms Pro

WP Fusion

WPFunnels

Search Contacts

Howdy, ziflite

Bit Social Pro

Comments

Progressify

WooCommerce

Products

Payments

Analytics

Marketing

ZifChat

Customizer

Setup Wizard

Analytics

What's New

AI Assistant

License

Ziflite MCP

WPVibe

Appearance

Plugins

Snippets

Users

Tools

Settings

FluentCommunity

FluentNotify

WP Armour

Model

GPT-5.6 Luna — fast / economical

Choose a recommended model, or use a custom model ID.

Test AI connection

Business information

What does the business do? Services, prices, locations, policies, FAQs...

General information remains supported. Use the Knowledge Base below for information you want to organize into separate topics.

Knowledge Base

Business Knowledge

Organize the facts ZifChat AI can use when answering visitors.

+ Add knowledge

KB Build your AI knowledge

Add information manually, import website pages, or upload a PDF. ZifChat uses these sources to answer visitors before deciding whether a human is needed.

Smart Website Knowledge Crawler

Enter a public website or page. Import one page, or discover useful pages from the same website and choose what becomes AI knowledge.

https://example.com

Import page

Discover site

Import PDF

Upload a text-based PDF to turn its contents into a knowledge entry. ZifChat can read ordinary text PDFs without requiring a special hosting extension.

Choose File

No file chosen

Import PDF

No structured knowledge yet. Your existing Business Information still works.

Manual knowledge, a website crawler and text PDF import feed answers; the AI instructions set its boundaries.

PRO · WOOCOMMERCE

Start an order conversation on WhatsApp.

When WooCommerce is installed, **WooCommerce product mode** gives the chat relevant product context. Under **Order on WhatsApp**, enable the CTA, set its button text, and select Product pages, Cart and/or Checkout. Clicking the CTA opens ZifChat with a product or cart message already prepared for the visitor.

12

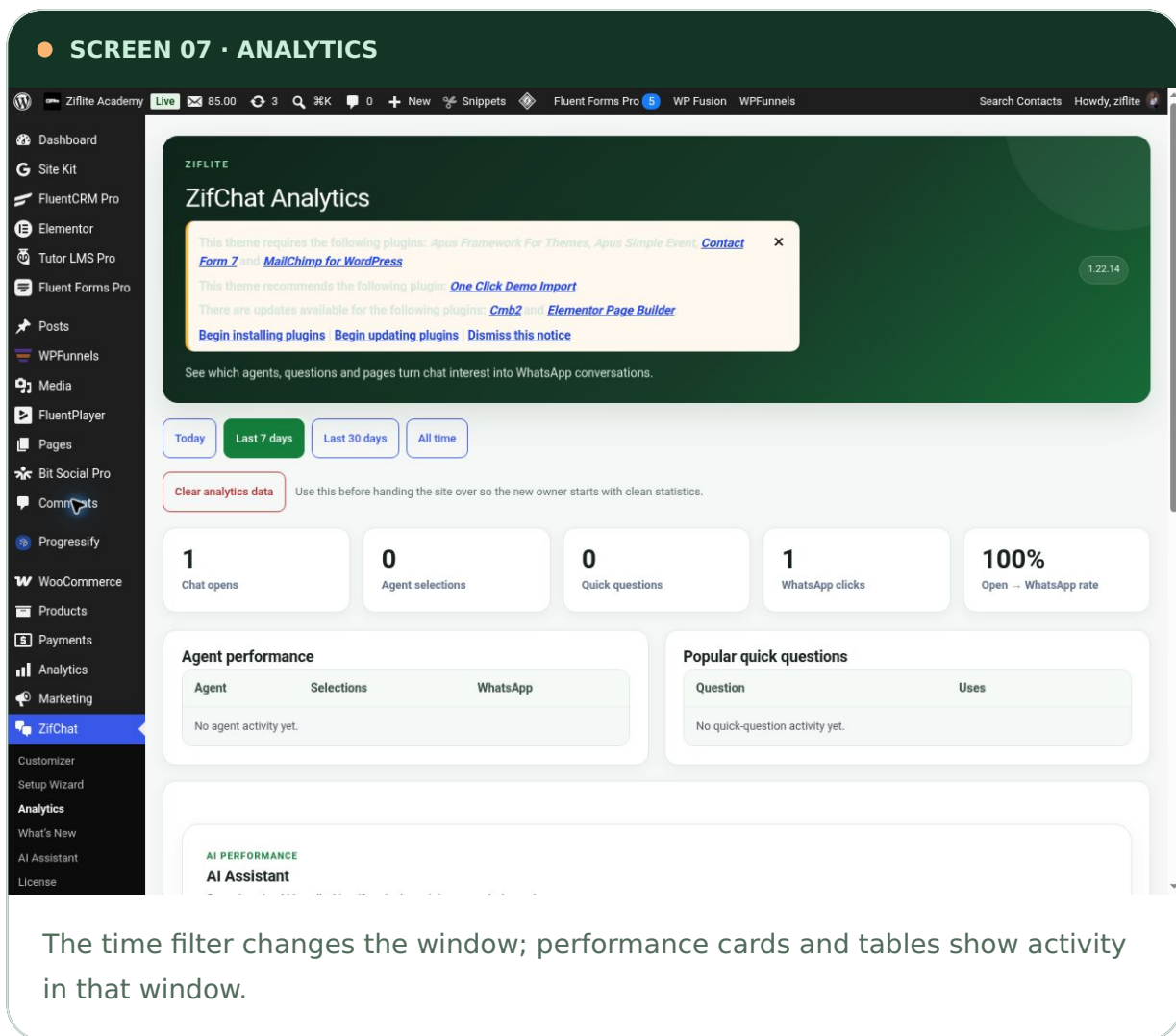
Test each selected surface on your store. The CTA starts a conversation; it is not a payment gateway. Check excluded URLs, routing and product text before relying on it.

MEASUREMENT

Understand what visitors do.

Go to **ZifChat** → **Analytics** and filter Today, Last 7 days, Last 30 days or All time. Basic metrics include chat opens, agent selections, quick questions, WhatsApp clicks and open-to-WhatsApp rate. Tables break down agents, questions, pages and daily activity. Pro adds AI conversations, questions, handoffs, live-agent clicks and an **Analyze with AI** explanation.

A WhatsApp click is a handoff signal, not proof that the visitor pressed Send in WhatsApp or completed a sale. The screen reports aggregate activity, not visitor identities or message contents. Clear analytics data removes historical metrics; use it deliberately.



PRO LICENSE

Activate Pro and understand updates.

After purchase, go to **ZifChat → License**, enter your key and activate it on this website. Personal allows one site; Business allows five. Both unlock the same complete feature set. The License screen displays activation status, use, and the updates/support date.

The current commercial terms are lifetime use of the activated plugin with one year of updates and support. When the update/support term ends, an active lifetime installation continues to run; renewal is for continued updates and support. Deactivating on a site releases that activation and locks Pro features while preserving configuration.

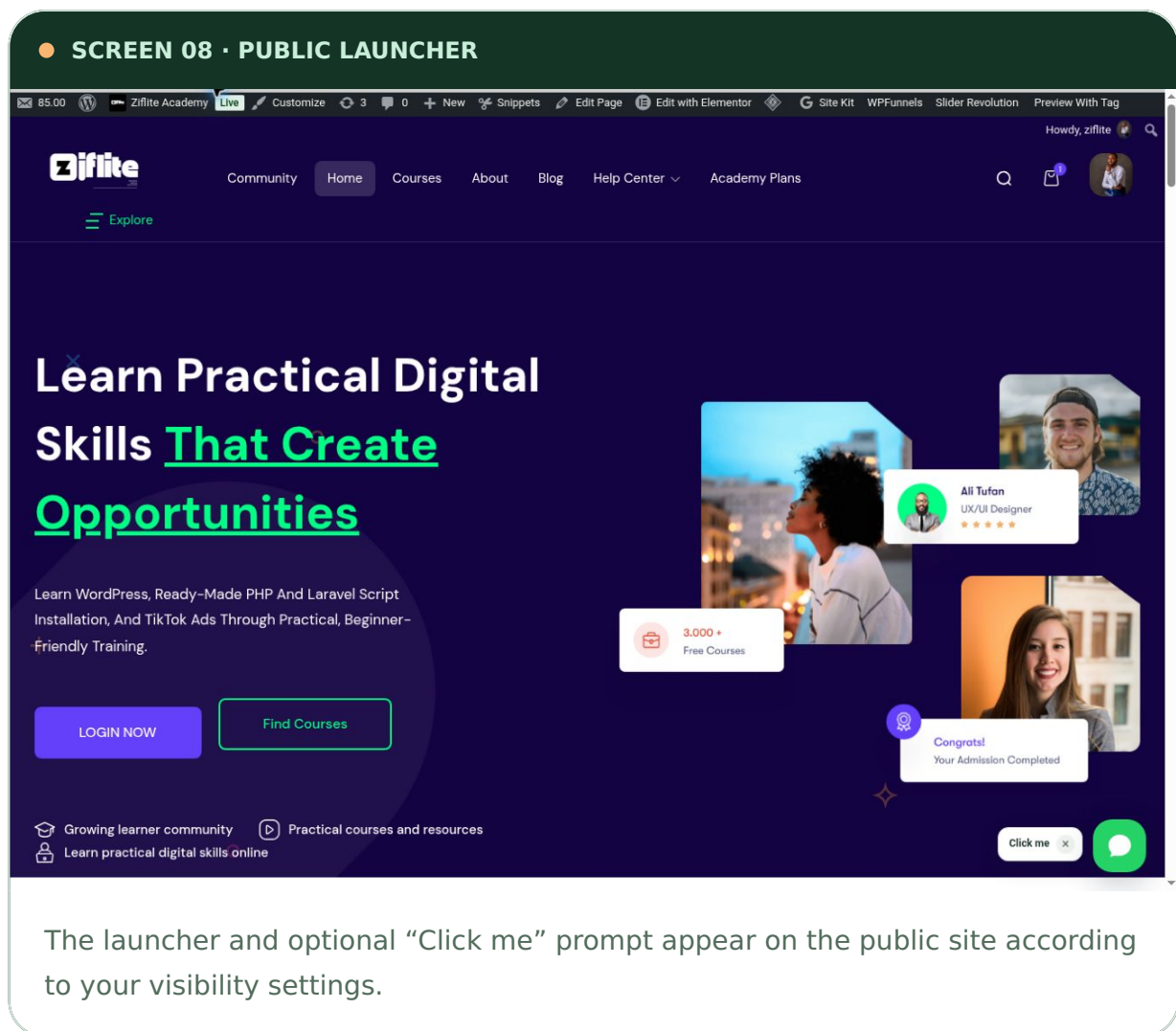
Use WordPress's normal plugin updates when your update entitlement is active. Keep a backup and verify your site after updating.

HELP

Common checks before contacting support.

Problem	What to check
Launcher does not appear	Enable ZifChat, device visibility, front-page-only setting, excluded URLs and page cache.
Wrong WhatsApp destination	Agent numbers, fallback number and international format.
Agent shows at the wrong time	WordPress timezone, general hours and agent-specific Pro schedule.
Premium control is locked	License activation and website allowance.
AI fails to answer	Provider and model choice, API key, connection test, approved knowledge and AI instructions.
PDF knowledge is missing	Selectable text in the PDF and the imported knowledge entry.
WooCommerce CTA does not show	WooCommerce, selected surface, CTA switch and excluded URLs.
Analytics and actual WhatsApp chats differ	Clicks are tracked in ZifChat; the final send occurs separately in WhatsApp.

Visitor view



Can visitors still talk to a human when AI is on?

Yes. The AI screen says Talk to a human remains available; agent schedules and WhatsApp routing apply.

Does the setup wizard replace the Customizer?

No. Use the wizard for the first pass and the Customizer for detailed controls.

Are all Pro models included in the license?

The license unlocks provider integration. Your AI provider account controls model access and bills API usage separately.

ZifChat by Ziflite · Guide for version 1.22.14 · [Product and plans](#) · [Contact support](#)