

Chatly Pro

User Manual

Version 2.2.0

AI-Powered Chatbot for WordPress

[Lead Capture](#) • [SEO Insights](#) • [Email Integrations](#)

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1. Introduction

Chatly Pro is an AI-powered chatbot plugin for WordPress that helps you engage visitors 24/7, answer questions automatically, and capture leads. Unlike basic chatbots with rigid scripts, Chatly uses advanced AI models from Anthropic (Claude) or OpenAI (ChatGPT) to have natural, intelligent conversations.

What's Included in Chatly Pro

- Unlimited conversations — No monthly message limits
- Dual AI support — Claude by Anthropic and ChatGPT by OpenAI
- AI Messaging Generator — Let AI create your chatbot messaging
- Lead capture forms — Collect names, emails, and phone numbers
- Email integrations — MailPoet, Mailchimp, Constant Contact, AWeber, webhooks
- Knowledge Base — Add custom Q&As for accurate responses
- SEO Insights Dashboard — Discover what visitors really want (NEW)
- Yoast SEO Integration — Compare focus keywords with visitor language (NEW)
- FAQ Schema Generator — One-click JSON-LD for Google (NEW)
- Email transcripts — Send chat history to leads automatically
- Analytics dashboard — Track conversations, leads, and conversions
- Full customization — Colors, position, sizing, custom CSS
- White label option — Remove Chatly branding
- Priority support — 24-48 hour response time

2. What's New in v2.2.0

SEO Insights Dashboard

The all-new SEO Insights Dashboard turns every chatbot conversation into actionable SEO intelligence. Instead of guessing what your visitors want, now you can see exactly what they're asking—in their own words.

Key Features:

- Top Questions Report — See the most frequently asked questions ranked by frequency
- Keyword Extraction — Discover the exact words and phrases visitors use
- Keyword Phrases — Find 2-3 word long-tail keyword opportunities
- Content Gap Detection — Identify questions your chatbot struggled to answer
- Suggested KB Entries — Get recommendations for Knowledge Base additions

Yoast SEO Integration

If you have Yoast SEO installed, Chatly automatically detects it and provides powerful keyword comparison features:

- Matching Keywords — See which of your focus keywords visitors actually ask about
- New Opportunities — Discover topics visitors care about that you're not targeting
- Yoast-Only Keywords — Identify focus keywords that don't appear in conversations

FAQ Schema Generator

Generate Google-ready FAQ structured data (JSON-LD) with one click. Your Knowledge Base entries are automatically converted into schema markup that can help you earn rich snippets in search results.

Previous Updates (v2.1.0)

- AI Messaging Generator — Auto-generate system prompts and welcome messages
- Constant Contact Integration — Send leads directly to Constant Contact
- AWeber Integration — Connect with AWeber for email marketing

3. Requirements

Before installing Chatly Pro, ensure your website meets these requirements:

- WordPress: Version 5.0 or higher
- PHP: Version 7.4 or higher
- API Key: From Anthropic (Claude) or OpenAI (ChatGPT)
- License Key: From your purchase confirmation email

Checking Your WordPress Version

Log into your WordPress admin, go to **Dashboard** → **Updates**. Your current version is displayed at the top.

Checking Your PHP Version

Go to **Tools** → **Site Health**, click the **Info** tab, expand the **Server** section, and look for "PHP version".

4. Installation

Method 1: Upload via WordPress Admin

1. Download the chatly-v2.2.0.zip file to your computer
2. Log into your WordPress admin dashboard
3. Go to Plugins → Add New
4. Click Upload Plugin at the top
5. Click Choose File and select the zip file
6. Click Install Now
7. Once installed, click Activate Plugin

Method 2: Upload via FTP

Unzip the file on your computer, connect via FTP, upload the chatly folder to /wp-content/plugins/, then activate in WordPress admin.

Verify Installation

After activation, you'll see a new **Chatly** menu item in your WordPress admin sidebar with submenus for Settings, Knowledge Base, Leads, Conversations, Analytics, and SEO Insights.

5. License Activation

Activating Your License

8. Go to Chatly → Settings in WordPress admin
9. Click the License tab
10. Enter your license key from your purchase confirmation email
11. Click Activate License
12. You'll see "License activated!" on success

License Status

After activation, you'll see: Licensed To (your name), Email (purchase email), Expires (expiration date or "Never" for lifetime), and Site Activations (number of sites used).

Finding Your License Key

Your license key was sent to your email after purchase. You can also find it at hellochatly.com/account by logging in with your purchase email.

6. Getting Your AI API Key

Chatly requires an API key from either Anthropic (Claude) or OpenAI (ChatGPT). You only need one—choose whichever you prefer.

Option A: Anthropic (Claude) — Recommended

Claude is known for helpful, harmless, and honest responses.

13. Go to console.anthropic.com
14. Click Sign Up and create an account (or sign in)
15. Complete email verification
16. Navigate to API Keys in the left sidebar
17. Click Create Key and give it a name (e.g., "Chatly")
18. Copy the key immediately—you won't see it again!
19. Add billing information to activate your account

Typical Cost: \$3-5/month for most websites

Option B: OpenAI (ChatGPT)

ChatGPT is widely known and highly capable. Go to platform.openai.com, create an account, navigate to API Keys, create a new key, and add billing information.

Typical Cost: \$5-10/month for most websites

Important Notes

- Keep your API key secret—never share it publicly
- API costs are billed directly by Anthropic or OpenAI, not Chatly
- You can set usage limits in your provider's dashboard to control costs
- Both providers offer free trial credits for new accounts

7. AI Provider Configuration

Accessing Settings

Go to **Chatly** → **Settings** and click the **AI Provider** tab.

Configuration Steps

20. Select your provider: Anthropic (Claude) or OpenAI (ChatGPT)
21. Enter your API key in the text field
22. Click the eye icon to show/hide the key
23. Click Test Connection to verify (green = success)
24. Choose your model from the dropdown
25. Click Save Settings

Available Models

Anthropic: Claude Sonnet 4 (recommended), Claude 3.5 Sonnet, Claude 3 Haiku

OpenAI: GPT-4o, GPT-4o Mini (recommended), GPT-3.5 Turbo

8. AI Messaging Generator

Let AI create your chatbot messaging automatically. Simply describe your business and let Chatly generate your system prompt, welcome message, and initial greeting.

How to Use

26. Go to Chatly → Settings → Messages tab
27. Find the AI Messaging Generator section at the top
28. Describe your business in the text area
29. Click Generate Messaging with AI
30. Review and edit the generated content
31. Click Save Settings

What to Include

- What your business does
- Your main products or services
- Business hours and location
- How you want the chatbot to behave
- Any specific policies or FAQs

9. Customizing Messages

The Messages tab contains three key settings:

System Prompt: Instructions that define how your chatbot behaves, its personality, and what it knows about your business.

Welcome Bubble: The text shown on the floating chat bubble before visitors open the chat window.

Initial Message: The first message visitors see when they open the chat window.

10. Appearance Settings

Customize how your chatbot looks:

- Primary Color — Main color for buttons and accents
- Secondary Color — Supporting color for gradients
- Position — Bottom-right or bottom-left of the screen
- Welcome Bubble — Toggle visibility and customize text
- Custom CSS — Advanced styling for developers

11. Lead Capture

Configure when and how to collect visitor information:

- Enable/disable lead capture
- Choose required fields: name, email, phone
- Set trigger conditions (after X messages, on specific keywords)
- Enable email transcript option for visitors
- Customize the lead capture form message

12. Email Integrations

Send captured leads directly to your email marketing platform:

- MailPoet — Enter your list ID
- Mailchimp — Enter API key and audience ID
- Constant Contact — Enter access token and list ID
- AWeber — Enter account ID, list ID, and access token
- Custom Webhook — Send leads to any endpoint via POST

13. Knowledge Base

Add specific Q&As for accurate responses. Go to **Chatly** → **Knowledge Base** and click **Add New**. Fill in the question, answer, keywords, category, and priority level.

Priority Levels: Normal (default), High (takes precedence), Highest (always used when keywords match).

14. SEO Insights Dashboard

NEW IN v2.2.0 — The SEO Insights Dashboard transforms your chatbot conversations into actionable SEO intelligence.

Accessing SEO Insights

Go to **Chatly** → **SEO Insights** in your WordPress admin. Select a time period (7, 30, 90, or 365 days) to analyze.

Overview Tab

See key statistics at a glance: total conversations, user messages, most asked question, content gaps detected, top 5 questions, and top 15 keywords.

Top Questions Tab

View all questions visitors have asked, ranked by frequency. Each question shows how many times it was asked and includes an "Add to KB" button to quickly create a Knowledge Base entry.

Suggested KB Entries: Questions that appear frequently but don't have matching Knowledge Base answers.

Keywords Tab

Discover the exact language visitors use:

- Single Keywords — Individual words with frequency counts
- Keyword Phrases — 2-3 word combinations (great for long-tail SEO)
- Export Button — Copy all keywords for use in SEO tools

Content Gaps Tab

Identifies questions where the AI struggled to provide a good answer. These are content opportunities—questions your visitors have that your website doesn't adequately address.

How it works: Chatly detects responses containing phrases like "I don't have information about," "I'm not sure," or "I'd recommend contacting." The original visitor questions are then surfaced with frequency counts.

FAQ Schema Tab

Generate structured data for Google:

- JSON-LD Schema — Copy-paste ready markup for your site's <head>
- HTML FAQ Block — Formatted FAQ content for your pages
- Based on your Knowledge Base — Automatically uses your existing Q&As

Note: You need at least one enabled Knowledge Base entry to generate schema.

Yoast SEO Integration Tab

If Yoast SEO is installed, this tab appears automatically and shows:

- **Keywords You're Nailing** — Focus keywords that match visitor language (green)
- **New Opportunities** — Topics visitors ask about that you're not targeting (orange)
- **Suggested Actions** — Specific steps to improve your SEO strategy

15. Viewing Conversations

Go to **Chatly** → **Conversations** to see all chat transcripts. Each entry shows the date, number of messages, page URL, lead capture status, and a View button for the full transcript.

16. Analytics Dashboard

Go to **Chatly** → **Analytics** for key metrics:

- **Total Conversations** — All-time conversation count
- **Total Leads** — All-time leads captured
- **Conversion Rate** — Percentage of conversations that become leads
- **Total Messages** — All messages sent/received
- **This Week Stats** — Conversations and leads from the past 7 days

17. Troubleshooting

Chatbot Not Appearing

- Verify license is activated (License tab)
- Check API key is configured (AI Provider tab)
- Clear browser cache and site cache
- Try incognito/private browsing
- Check browser console for JavaScript errors
- Test with default theme to rule out conflicts

AI Not Responding

- Test connection in AI Provider settings
- Verify API key is correct (no extra spaces)
- Check your balance with Anthropic or OpenAI
- Try a different model

Email Integration Not Working

- Double-check API credentials
- Verify list/audience ID is correct
- For MailPoet, ensure the plugin is active
- Test with webhook.site to debug

18. FAQ

Q: How many sites can I use Chatly Pro on?

A: Check your license tier: Starter (1), Business (3), Professional (10), Agency (25), Enterprise (unlimited).

Q: Do I need both Claude and ChatGPT keys?

A: No, you only need one. Choose whichever provider you prefer.

Q: How much does the AI cost?

A: You pay Anthropic or OpenAI directly. Most sites spend \$3-10/month.

Q: Can I switch AI providers?

A: Yes! Just enter the new API key and select the provider.

Q: Is my data secure?

A: Yes. All data is stored in your WordPress database. We never see your conversations or leads.

Q: What is SEO Insights?

A: A dashboard that analyzes chatbot conversations to reveal what visitors ask, keywords they use, and content gaps on your site.

Q: Do I need Yoast for SEO Insights?

A: No. Yoast integration is a bonus feature. All other SEO Insights features work without Yoast.

19. Support

Pro Support

- Email: support@mediamanagementcorp.com
- Response time: Within 24-48 hours
- Documentation: hellochatly.com/docs

When Contacting Support

Please include: your website URL, WordPress version, PHP version, Chatly version (2.2.0), description of the issue, screenshots if applicable, and any error messages.

Managing Your Account

- License management: hellochatly.com/account
- Download updates: Available in your account
- View purchases: See all your licenses and activations

Thank you for choosing Chatly Pro!

We're excited to help you engage more visitors, capture more leads, and discover what your audience really wants.

hellochatly.com