

Ultimate WordPress Checklist 2.0

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Step	Stage	Task	Description	Technical Level	Optional	Step Done?
1	Install	Domain and Hosting	There are some really great WordPress web hosting providers out there, but the 2 we recommend are Siteground and WP engine . WordPress.org has recommended hosts as well. https://wordpress.org/hosting/	Varies	Necessary	
2	Install	1 Click WP Install	You can use a 1 click install depending on how your web host is set up. Go to your particular web host's support site and follow the instructions on how to set up WordPress. If you have a managed WordPress host such as WP engine , or Pantheon Install is done very easily for you. Other shared hosts such as Bluehost and Siteground may require you to take a few	Easy	Necessary	

			additional steps. Please check your host's documentation.			
3	Install	Email Account Setup	Some webhosts include email hosting as part of their hosting package. For other hosts, you will need to use a separate service such as G-Suite Or FastMail in order to get email for your website using your URL .	Moderate	Recommended	
4	Install	Login as Administrator	For a default WordPress setup, the login is found at http://yoursite.com/wp-admin You'll need to login using your username (or email address), and the password that you chose in the 1 click install step. Depending on your webhost, you may have received an email requesting that you reset your password, after which you'll be able to login.	Easy	Necessary	

5	Install	Update Site Name and Tagline	In the dashboard under Settings>General , update the site title and tagline. The site title will be what is listed in search engines for your site and will also show in the browser tab. Your site tagline may or may not be visible on your site based on the theme that you're using.	Easy	Necessary	
6	Install	Update Timezone /Date/Week Start	In the dashboard under Settings>General , update the Date format, Timezone, and Day of the Week. The timezone is especially handy to set, because any administrative emails that are sent to you will reflect the time that is set on this page.	Easy	Recommended	
7	Install	Delete Sample Content	In the Dashboard under Posts , delete the "Hello World" Blog post. Under Pages , delete the "Sample Page" content.	Easy	Necessary	

			Under Comments delete the "Sample Comment".			
8	Install	Set Permalinks	In the dashboard under Settings > <u>Permalinks</u> update the Permalink format - in most cases, it should be the "Post Name" format. This is the best setting for SEO (Search Engine Optimization) purposes.	Easy	Necessary	
9	Install	Set Homepage	If you don't want your blog posts to be the first thing visitors see go to the dashboard under Settings > Reading and update the static page and blog page settings. Set the static page to whatever homepage that you have set up.	Easy	Recommended	
10	Install	Set the number of Posts	In the dashboard under Settings > Reading update the number of blog posts to set how many blog posts are shown on the blog page. The default is 10,	Easy	Recommended	

			but can be changed to any number.			
11	Install	Discourage Search Engines	In the dashboard under Settings > Reading check the "Discourage search engines from indexing this site" This keeps Google and other search engines from displaying your site in search results while you are working on it. Make sure to uncheck this box when your site is ready to launch.	Easy	Recommended	
12	Install	Choose Comments Settings or Disable Comments	If you want to have comments on your site, choose Settings > Discussion and check the appropriate boxes. If you want to disable all plugins install the Disable Comments Plugin	Easy	Recommended	
13	Install	Setup Cloudflare	Cloudflare is a great free service that provides CDN and SSL for your site. You will see great speed improvements once you	Moderate	Recommended	

			setup your site on this service.			
14	Install	Google Account Setup	If you don't have a Google Account, you will need one to add Google Analytics, Webmaster Tools, and other items later. You can sign up for one Here	Easy	Recommended	
15	Install	Website Monitoring	There's nothing worse than going to your website and seeing it is down. You'll want to add uptime monitoring to know if your site is down for a large amount of time. You can sign up for Uptime Robot or Pingdom . These services will monitor your WP site and notify you if it is down.	Easy	Recommended	
16	Install	Mailing List Setup	If you want to market to your potential customers via email, you can setup your own mailing list hosted in your own site, or via an external service. If you want it hosted on your own site, then you'll	Moderate	Recommended	

want to use plugins such as: [Mailpoet 3](#) or [The Newsletter Plugin](#) If you're looking for external services with more features then you'll want to look at:

[Mailchimp](#)

[Aweber](#)

[ActiveCampaign](#)

[CampaignMonitor](#)

[ConstantContact](#)

[ConvertKit](#)

[Emma](#)

[Feedblitz](#)

[FeedBurner](#)

[GetResponse](#)

[HubSpot](#)

[iContact](#)

[Infusionsoft](#)

[MadMimi](#)

[MailerLite](#)

[Mailster](#)

[Ontraport](#)

[SalesForce](#)

[SendinBlue](#)

17	Install	Install WP Theme	You'll want to add a theme to your WP site in order to give it the looks/functionality that you want. There are multiple themes available to you via WordPress.org. Go to Appearance > Themes to see all of the free WordPress.org themes. There are also multiple themes available on Themeforest, and through individual theme shops online. Some themes even include premium plugins to enhance your site even more. Installing a WordPress theme is easy, choosing one is difficult! The following list should be kept in mind: • Free theme or premium theme? • Is the theme supported and updated regularly? • Does it use a page builder, or the default WordPress Editor?	Easy	Necessary	
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18	Install	Upload Favicon	A favicon is the small 16 pixels x 16 pixels icon that you see in your browser tab when you load a website. Various themes allow you to upload a favicon for your site to give it a more professional appearance.	Moderate	Recommended	
19	Install	Set Privacy Page	With the new GDPR rules and Privacy requirements, you should set your privacy page- Go to your Dashboard > Settings > Privacy	Easy	Necessary	
20	Install	Install SEO Plugin	You'll want to install a Search Engine Optimization,(SEO) plugin that will help you to be found on search engines. Two of the leading plugins are Yoast Seo and All In One Seo	Easy	Recommended	
21	Install	Install Backup Plugin	You'll want to have some way to backup your site. Web Hosts generally do a backup, but you'll probably want one of your own. We	Easy	Recommended	

			recommend Updraftplus it is extremely reliable, easy to use, and has alot of reasonably priced extensions.			
22	Install	Install Contact Form with honeypot/recaptcha	A contact form is pretty much necessary to interact with potential customers/clients. Do a wordpress.org search to get potential plugins. Some popular forms are Gravity Forms , Ninja Forms , and Contact Form 7 .	Easy	Recommended	
23	Install	Install Anti Spam Plugin	Anti spam plugins will keep spammers at bay. WP Bruiser , Anti spam , and Akismet are three good options.	Easy	Recommended	

Step	Stage	Task	Description	Technical Level	Optional?	Step Done?
24	Secure	Get Let's Encrypt SSL cert if you didn't configure Cloudflare	If you didn't configure Cloudflare in the install step, you'll want to install a free Let's Encrypt certificate through your webhost. This will allow a secure connection between your website and the visitors computer. Search engines and browsers are now requiring that websites have SSL or they will flag the site as insecure.	Moderate	Necessary	
25	Secure	Get an FTP Program and FTP Setup	In order to secure your site, you'll need access to the files on your site. An FTP program will keep you from having to login to your web host every time you need to make a change. Filezilla and Cyberduck are two great FTP programs	Moderate	Necessary	
26	Secure	Download a text editor	You'll need a text editor to change values in certain files that you access using FTP.	Moderate	Necessary	
27	Secure	Change Admin	The "admin" username that comes by default with WordPress is well known by hackers. From that point all they	Moderate	Necessary	

		Account Name	need to do is guess your password. To increase security, you should remove the admin user account. To add a new user to replace the admin account follow: https://wp-tutoring.com/adding-new-user-to-wordpress/ - Then log into that new account you just created and delete the old "admin" user.			
28	Secure	Change default WordPress login page	http://yoursite.com/wp-admin is the usual WordPress login page. In order to make it a little harder for hackers you can change the login page location to something else such as https://yoursite.com/customlogin using the WPS Hide plugin	moderate	Necessary	
29	Secure	Force SSL Plugin	Once you enable SSL, you'll want to have all of your url's be loaded over to https://. The Really Simple SSL plugin works well for this task.	advanced	Necessary	
30	Secure	Install Strong Passwords Plugin	If your webhost doesn't provide this already, you'll want to install a plugin that forces your website users to use stronger passwords which increase security. No more "Password123" -	Easy	Necessary	

			There are multiple plugins that helps you accomplish this. https://wordpress.org/plugins/search/strong+passwords/			
31	Secure	Set appropriate user levels for all users (editor or below unless necessary)	WordPress has 5 user levels- each level has the ability to do different things on your website. Make sure you give the appropriate user level to each user. To get more explanation, read the following: https://wp-tutoring.com/wordpress-user-roles/	Moderate	Recommended	
32	Secure	Turn off code editing from the admin dashboard	Using FTP, find your website's wp-config.php file. Add the following line before the <code>/**That's All...*/</code> line <code>define('DISALLOW_FILE_EDIT', true);</code> This will keep a hacker that gets admin permissions from directly editing your code. https://codex.wordpress.org/Editing_wp-config.php	Advanced	Recommended	
33	Secure	Update Unique Keys	You can update the WordPress salts that are in your wp-config file in order to harden security. Once you replace	Advanced	Recommended	

			them anyone who is currently logged into your site will be logged out. They will be able to login again with no problems.https://codex.wordpress.org/Editing_wp-config.php			
34	Secure	Move wp-config.php	wp-config.php is a very important file that can easily compromise your site if it falls into a hackers hands. Moving it up one level in your servers directory keeps it out of your public folder just in case your server is compromised.https://codex.wordpress.org/Editing_wp-config.php	Advanced	Recommended	
35	Secure	Stop SQL Injection Attacks	One of the best ways to mitigate this style of attack is to install Wordfence or All in One Security	Advanced	Recommended	
36	Secure	Change WordPress Database Prefix	By default WP creates database tables that begin with wp_ ... which possible hackers know and can write SQL scripts for. By changing the database prefix you can make it harder for hackers to create scripts to compromise your database	Advanced	Recommended	

			information. Some webhosts do this by default.			
37	Secure	Update Htaccess Settings	A .htaccess file is used by a web server to set permission and security. Your WordPress installation contains one of these files and can be used to increase security on your website. Install the Wordfence plugin for a fast way to check the security of your .htaccess file. Find out more about .htaccess files.	Advanced	Recommended	
38	Secure	Add File Monitoring Scan	One of the quickest ways to determine if you are being hacked is to have a file monitor to determine if a hacker has changed any of your WP core or Plugin files. Plugins such as Wordfence or All in One Security will monitor this for you along with other security benefits, but if you're looking to do this in a lighter weight package, you can use a plugin such as WordPress File Monitor	Easy	Optional	
39	Secure	Check Comment Settings	The Settings Discussion Screen allows you to set the options concerning comments (also called	Moderate	Optional	

			discussion). You can find this on the Settings—> Discussion menu item. It is here the administrator decides if comments are allowed and what constitutes Comment Spam.			
40	Secure	Implement 2 Factor Security	If you or a small team of people will be logging into a site, you should consider using two factor authentication, which not only uses a username and password, but also requires an additional device, such as your cell phone to log you into the account.	Advanced	Optional	
41	Secure	Get Let's Encrypt SSL cert if you didn't configure Cloudflare	If you didn't configure Cloudflare in the install step, you'll want to install a free Let's Encrypt certificate through your webhost. This will allow a secure connection between your website and the visitors computer. Search engines and browsers are now requiring that websites have SSL or they will flag the site as insecure.	Moderate	Necessary	

Step	Stage	Task	Description	Technical Level	Optional?	Step Done?
42	Configure	Plan Site Taxonomy	A site taxonomy is a grouping mechanism for content. There are two default ways to group content in WordPress: -Categories which group posts together. Categories can be placed in hierarchies. Think of categories as your site's table of contents. Your categories should help identify what your site is about. -Tags are keywords related to your posts. Tags have no hierarchy. Tags are your site's index words. Your tags allow micro-categorization of your site's content. You can manage your tags and categories from within WordPress Administration. Most sites will work fine with these taxonomy types.	Moderate	Recommended	

			However you are not limited to just two types of taxonomy in WordPress. You create custom post types and custom taxonomies to organize your content as you wish e.g., create a job taxonomy for a jobs website or a movie taxonomy for a movie review website. Find out more about taxonomies and custom post types.			
43	Configure	Gutenberg or classic editor	Heading into WordPress 5.0 and beyond the "Gutenberg" editor will be used in WordPress. If you don't want to use that editor, then install the Classic Editor plugin in order to disable Gutenberg.	Easy	Necessary	
44	Configure	Configuring the WordPress Theme	Depending on your theme, you'll want to customize certain things such as Page titles, Post meta, etc... You'll want to refer to your theme makers homepage to find	Easy	Necessary	

			out all of the options that are available to you.			
45	Configure	Improve 404 Errors	404 errors happen when a page is requested that does not exist. WordPress can handle these errors fine but you can make your 404 pages much better by installing the 404 page plugin .	Easy	Recommended	
46	Configure	Configure Related Content	Once your visitors have finished reading one piece of content, it always a good idea to show them related content. You can do this automatically by installing and configuring the Jetpack plugin by Automattic. Jetpack has the added benefit of generating the information off server so that your hosting account won't have to bear the database load of indexing and serving up the related posts.	Easy	Recommended	

47	Configure	Add Contact Page	Almost all sites will need to have a contact page of some sort. There's a plethora of contact forms that serve different needs. Additionally, depending on your theme you may have a form builder included. You can find a list of free contact forms here .	Easy	Necessary	
48	Configure	Add HTML Sitemap	This is very important to allow google to crawl and index relevant pages on your site - you can create one through plugins or you can use an online scanner and place the html code in your public html directory.	Easy	Recommended	
49	Configure	Privacy Policy, Terms and Conditions, Copyright	With the new European and eventually US rules, you'll need to add these pages to your site. You may need to have a lawyer draft them if your site has specific needs. WordPress gives a privacy policy setting at - Settings -> Privacy in the WordPress dashboard. Use the following url to help generate a Privacy Policy. getterms.io You can also	Moderate	Necessary	

			modify the WordPress default Privacy Policy under Dashboard > Settings > Privacy .			
50	Configure	Install Maintenance Page Plugin	There may be times when your site has to be down due to updates, etc.. Installing a maintenance page plugin will allow site visitors to know that it is scheduled maintenance and will encourage them to come back at a later time. https://wordpress.org/plugins/search/maintenance/	Easy	Recommended	
51	Configure	Setup 301 Redirects if upgrading from old site	If your site was pre-existing, and you are changing the url of certain pages, you'll want to use 301 redirects to let search engines know that the content has moved For instance, if your old url was mysite.com/about-us, and we want to make it mysite.com/about, you'll need to use a 301 redirect to inform search engines of the move.	Moderate	Recommended	

			https://wordpress.org/plugins/search/301/			
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Step	Stage	Task	Description	Technical Level	Optional?	Step Done?
52	Connect	Configure Google Analytics plugin	There are multiple google analytics plugins that you can install and configure	Moderate	Highly Recommended	
53	Connect	Social Media Integration via SNAP, Jetpack, or other plugin	If you have social media accounts that you want to send content to automatically from your blog, then use a plugin such as jetpack or Social Network Auto Poster (SNAP) to send blog posts automatically to your social media accounts.	Moderate	Recommended	
54	Connect	Connect your site to AdSense or Amazon	There are some blogs that generate enough traffic to receive revenue. You can connect your site to AdSense or Amazon in order to generate profit.	Moderate	Recommended	

55	Connect	Configure AdSense and Other Advertising	Placing ads for products or services on your site is one way to monetize your site's traffic. You will want to install an ad plugin based on which ad service you're using. Certain themes also have ad functionality built in. Advanced Ads and Ad Widget are two great plugins.	Moderate	Recommended	
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Step	Stage	Task	Description	Technical Level	Optional?	Step Done?
56	Optimize	Integrate Payment or Ecommerce Provider	If you are going to allow purchases on your site, you'll need to configure for the top two, (and easiest to integrate) payment processors - Paypal and Stripe. If you are using Woocommerce or Easy digital downloads to power your e-commerce, those extensions are available. If you're not powering a full blown shop, you can use	Moderate	Recommended	

			form builder plugins with e-commerce add-ons for PayPal and Stripe in order to process payments.			
57	Optimize	Find unused media files and delete	If you have uploaded any images, and files that are not being used at all on your site. You can use the Media Cleaner plugin to alert you to those files, quarantine them, and eventually delete them from your site. This will help you to keep your WP install clean and clutter free.	Easy	Recommended	
58	Optimize	Add Image Compression Plugin	One of the items that will easily slow down your site is extremely large image sizes. You'll want to either optimize your images before uploading them or install a plugin such as WP Smush to compress the image sizes.	Easy	Recommended	
59	Optimize	Cleanup	You may now have multiple unused themes and plugins	Easy	Recommended	

			in your WordPress website. You should now deactivate and delete any unused themes and plugins from your website. Unused themes and plugins which are not updated can be a security risk. “Hello Dolly” and “Akismet”,(if you haven't signed up for their blog service), are two plugins which can usually be deleted. If you installed a different theme, you can delete a couple of the default WP themes such as Twenty-Sixteen, etc.			
60	Optimize	Increase the Performance of WordPress	Using a caching plugin such as W3 total cache, Fastest Cache, and others will speed up your site. Be sure to do your research on which one is appropriate for your needs. Not every webhost allows every caching solution, so be sure to check that as well.	Moderate	Recommended	

61	Optimize	Broken Link Checker	Do a check to make sure all of your links are valid. You can do this by installing the broken link checker plugin or use an online version.	Easy	Recommended	
62	Optimize	Test Your WordPress Configuration	Now that your website is almost complete, you should test the WordPress configuration to see if there are any issues: - Make a few test posts and make sure that your website passes the suggested tests on the WordPress.org website. -Validate your HTML/XHTML to make sure it is correct. -Validate your CSS to make sure it is correct.	Easy	Recommended	
63	Optimize	Test Your Website Using Different Browsers	Load up different browsers such as Firefox, Opera, Chrome and Safari and check the views to ensure it works.	Easy	Recommended	

64	Optimize	Test the mobile view of your website	View your website in different mobile tablets and phones additionally run the google mobile friendly check.	Easy	Recommended	
65	Optimize	Run Site Accessibility Test	Test your site to make sure it is accessible using the Web Accessibility Evaluation tool. https://wave.webaim.org/	Easy	Recommended	
66	Optimize	Run a Final Security Scan	Use a plugin such as Wordfence to run a final security check on your site. This will help you plug up any holes.	Easy	Optional	
67	Optimize	Add Content and Publicize	Make sure that you uncheck "Discourage search engines from indexing this site" that you checked in the configuration section Log into your webmaster tools account that you setup with Google and perform a "Fetch as Google" You should also make sure that	Easy	Necessary	

			your sitemap is listed in your webmaster tools account so that google is aware of new pages/posts on your site.			
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Congratulations! You're Done! Time for a Break!

