AgencyCientFinder.com – Onboarding 2: WordPress Setup

New Site Checklist

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So you've got WordPress installed on your site, but have you got it all setup correctly?

Here's our top tips for making sure you start your blog on the right footing:

1. Delete the Default WP Admin Account

Note: this is no longer done on some installations, depending on your web host and the WP installation tool they provide, so go to the users > admin menu to check.

This is a pretty simple, but effective security tweak, as the default username of "admin" is what hackers use to try and get in to your site with brute force attacks.

By changing or simply deleting the default "admin" user you stop them in their tracks.

Go to Users, Add New and create a new user with a different username, your own is usually best.

Make sure you give yourself the role of "administrator". Then logout and log back in with the new user info. Go back to Users and delete the old "admin" user.

The alternative is to change the role for admin to "Subscriber", again after creating your new admin user.

2. Delete "Hello World" post, page & comment

When you first install WordPress there will be a default post, page and comment called "Hello World" which you should get rid of before you do anything else.

Simple go to Posts, All Posts and then move your mouse under the "Hello World" post so you can click on the "Trash" link and delete the post.

Repeat the process for the "Hello World" Page and comment.

3. <u>Setup Your Permalink Structure</u>

To make sure your posts have the best URL structure for Search Engine Optimization you should change the "permalink Structure" from the default setting.

Simply go to Settings, Permalinks and click the radio button for the "Post Name" permalink structure option and click on save changes.

4. <u>Upload Your WordPress Theme</u>

The default WP Themes are ok, but fairly basic, so you should find a theme that fits the style and purpose of your blog.

You can search for themes for free from Appearance > Themes in the admin panel.

Recommended themes include:
https://wordpress.org/themes/oceanwp/
https://www.kadencewp.com/black-friday/
https://generatepress.com/

These are professional themes with free versions, to use some features you may need to upgrade.

One you have found a theme you want to use go to Appearance, Themes and click the "Add New" button.

You can then upload your theme, or choose from the free themes available.

Once you have uploaded your theme you can choose the option to activate it and start tweaking it to suit your blog niche/business.

5. Delete Unused WordPress Themes and Plugins

WordPress has some default themes and plugins that you should clear out once you have uploaded your own theme.

Getting rid of these unused themes and plugins will make sure that hackers can't take advantage of vulnerabilities in them to get in to your site.

For the Themes simply go to Appearance, Themes, then hover over the theme and click on the "Theme Details" link when it appears, then look for the "Delete" option in the bottom left hand corner.

For plugins simply go to the Plugins page and tick the box for all the plugins you are not using, then choose the "delete" option from the drop down box at the top or bottom of the page, then click apply and confirm your choice.

Note: This is a general "good practice" habit that you should get in to, any unused plugins or themes are better deleted, rather than left installed if you are not using them.

Removing them is better for your site security, site performance and server load, keeping your site from slowing down unnecessarily.

HOWEVER, you should always leave one of the default WP themes installed so that if your site ever has a failure from the active theme WordPress can default back to that so you can get back in and recover the site.

6. Change your site tagline from "Just another WordPress Site"

The default description/tag line setup needs to be changed to something that is relevant to your blog/niche/business.

Go to Settings, General and pop a suitable description for your site in to the Tagline box, and hit save changes.

7. <u>Making Comments Moderated</u>

Sooner or later your blog will be picked up by the spam bots and you'll start getting unwanted spam bot comments posted, you don't want these being automatically accepted and displayed, so it's best to make sure that all comments need to be approved.

Go to Settings, Discussion and make sure that the tick box option for "Comment must be manually approved" next to the "Before a comment appears" menu item is ticked.

I also recommend changing the option in Comment Moderation for "Hold a comment in the queue if it contains" to 0 links, to make sure any comments with links in are always held for moderation.

8. <u>Update your profile info</u>

Next go to Users, Your Profile and fill in as much as you can/want to.

Having more information in your profile will usually help your visitors connect for you and know that your blog is genuine, so it's worth taking the time to fill in at least a short bio and get a gravatar setup.

Using a gravatar is free - https://en.gravatar.com

To make sure your blog is displaying Gravatar avatars go to Settings, Discussion and scroll down to the Default Avatar option and choose Gravatar Logo

9. Check the time settings

Make sure your site is setup for your local time, as it may well be running on the time zone for the country in which your web server is based.

Go to Settings, General and choose your timezone in the drop down box.

It is also worth making sure your PC is synced to the world atomic clock, there's a free app you can use here:
http://www.worldtimeserver.com/atomic-clock/

Some plugins rely on the timezone set on your blog, and others may need your local PC to be synced to the same time, this will help do so if needed.

10. Setup your Ping List

WP has a built in "ping" feature that will let indexes know when you post new content on your blog, this helps bring in the search engine spiders and get your content indexed.

The minimum list you should have are these:
http://feedburner.google.com/fb/a/pingSubmit?bloglink=http://YourWebsiteURLGoeHERE.com/
http://rpc.weblogs.com/pingSiteForm?name=YourWebsiteNameGoesHERE&url=http://YourWebsiteURLGoeHERE.com

http://rpc.pingomatic.com/
http://blogsearch.google.com/ping/RPC2
http://bing.com/webmaster/ping.aspx
http://ping.blo.gs/

People tend to get carried away and build massive ping lists with way too many sites included, which is totally unnecessary, and can even be harmful.

There are also "ping list checker" plugins available to check the list you use if you want to make sure there aren't dead one's in the list you are using.

11. Add some Legal Documents

Having some legal documents and statements on your site may not seem very exciting, but it is well worth taking the time to make sure you have at least a Privacy Policy and Terms of Service/Terms & Conditions, not just to be compliant with your local government requirements (e.g. the FTC in the US), but also to protect you and your company just in case a visitor or customer does decide they want to come after you for something.

It's also necessary to have the basic documents in place for paid advertising with Google and Facebook, and Google also look for these when considering how to rank your site.

The simplest way of doing this is using the free WP Auto Terms plugin here:
https://wordpress.org/plugins/auto-terms-of-service-and-privacy-policy/

12. Additional Recommended Plugins

Whilst keeping the number of plugins you have installed on your site as low as possible is good for your site health, security and speed, here are some that can be worth looking at.

Security Plugins

You definitely need some security plugins added to keep hackers out of your site, the one's I use and recommend are:

Limit Login Attempts:
https://wordpress.org/plugins/limit-login-attempts-reloaded/

Threat Scan:
https://wordpress.org/plugins/threat-scan-plugin/

Malcare:
https://wordpress.org/plugins/malcare-security/

Wordfence:
https://wordpress.org/plugins/wordfence/

I do sometimes double up security by adding WordFence as well, but it can slow sites down, so make sure you use WPProfiler to keep an eye on site load speed.

CloudFlare, a full CDN (Content Delivery Network), can also add both security and speed to sites. This will be covered separately in another lesson.

And remember, for security the most important things are to keep WordPress updated to the latest version, along with your plugins and themes.

Also make sure you delete unused Plugins and Themes

AND take a regular backup of the site so you have a recovery point.

Backup Plugins

Making regular backups is essential, how often depends on how regularly the site is updated, but I would recommend at least weekly.

Our Recommended backup plugins are:
Backup Migration –
https://wordpress.org/plugins/backup-backup/

and Updraft Plus –
https://wordpress.org/plugins/updraftplus/

both have free versions that can do the basics that you need.

Other Misc. Plugins:

RankMath for SEO:
https://wordpress.org/plugins/seo-by-rank-math/

Classic Editor for non-Gutenberg style post/page editor:
https://wordpress.org/plugins/classic-editor/

Duplicate Page to easily duplicate existing posts and pages for creating new versions:
https://wordpress.org/plugins/duplicate-page/

Header Footer Code Manager for adding pixels and other custom codes to pages, posts, categories and more:
https://wordpress.org/plugins/header-footer-code-manager/

Site Management:

There are a variety of different plugins and services that allow you to centrally manage multiple sites of your own or your clients.

My preference is ManageWP -
https://wordpress.org/plugins/mainwp/
https://wordpress.org/plugins/mainwp-child/

And remember to use WPProfiler.com for keeping sites healthy and fast loading!

I hope you find this checklist useful in making sure you WordPress site is setup correctly and ready to help your online business succeed!