WORDPRESS ADMIN OPTIMIZATION

Checklist

1. SITE BUILD

○ Utilize built-in features like the theme customizer, widgets, and custom fields to make it easier for your client to edit content

○ Style the Visual Editor to match your site's front-end styles

○ Create a private Style Guide page using content from **WPFill.me**

○ Use the **Advanced Custom Fields** plugin to create an Options section, add notes/reminders throughout the theme, and hide unnecessary items on pages/posts

○ Verify your WordPress Settings are set up correctly (timezone, week start day, date/time format)

○ Create a custom dashboard widget that has links to documentation, image sizes, theme notes, and other helpful resources

○ Install and configure the **Google Analytics Dashboard for WP (GADWP)** plugin

○ *Optional:* Install the plugin **Search Meter** so clients can see what visitors are searching on their site

○ *Optional:* Install the plugin **Jetpack** to take advantage of their stats and traffic tools

2. DEFINING ROLES + USERS

○ Confirm with the client who should have access to the admin. Request names and email addresses.

○ Create a spreadsheet of users containing their name, email, username, password, and role

○ Create a custom role called Client via the **User Role Editor** plugin and determine what capabilities they should have

○ Hide unneeded dashboard widgets and restrict access to various areas (Appearance, Plugins, Tools, Settings, etc.) of the admin with the **Adminimize** plugin

○ Create your users and assign them to the Client role

○ Use the **User Switching** plugin to test all the logins and verify everyone has the correct access

3. TRAINING

○ Schedule a WordPress training with your client

○ Create training documentation that can be linked in your custom Dashboard widget

○ Show your client how to login and use the site with the credentials you created for them

○ Walk them through the Dashboard, custom widgets, notes, and documentation you've provided

○ Educate your client on best practices and how to troubleshoot

4. POST-TRAINING

○ Install and activate an activity monitor plugin. I recommend **Stream**, **Simple History**, or **WP Security Audit Log**.

○ Use **Adminimize** to hide access to the activity monitor plugin from the Client role

○ Provide the client with their login and give them access to their site

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