



Taking over an existing WordPress site

29 October 2024



AWESOME
TECH TRAINING



Housekeeping

All the attendee mics are muted – you can hear us but we cannot hear you.

This session is being recorded and we will send you a link to the recording and the slides after the event.

If you have any questions please use the Q&A function to ask them.



Who we are



Rachel Clinton



Steve Hanlon



Lorna Walker



Agenda

Why this webinar?

- Challenges when you inherit a site from someone else
- Security, hosting and backups

Managing the site appearance

- What's controlling the appearance of different bits of your site?
- What changes can you make easily?
- What should you not touch?

Understanding the structure and functionality

- Key metrics to measure your success
- Creating a virtuous circle of marketing success

Compliance and performance

- GDPR
- Cookie consent
- Speed and security



If anything isn't clear...

Please ask a question.

There are no stupid questions!



About us

- We're a small business based in Ireland and the UK
- We each worked in sales, marketing and web development for many years before forming Awesome Tech Training
- Our focus is on using our own experience to help small businesses take control of their own web presence
- Digital marketing / WordPress advice and support
- Book sessions by the hour – [contact us](#) to talk about how we can help you
- [Other webinars](#)





Why this webinar?



Akismet Anti-Spam

Akismet checks your comments and contact form submissions against our global database of spam to protect you and your site from malicious content.

By Automattic



5+ Million Active Installations

✓ Compatible with



Classic Editor

Enables the previous "classic" editor and old-style Edit Post screen with TinyMCE, Boxes, etc. Supports all plugins that ex

...

By WordPress Contributors



5+ Million Active Installations

✓ Compatible



**Where to
start with an
unfamiliar
site?**





What we'll give you in this session?

- A structured approach to working through an unfamiliar WordPress site
- A list of things to consider when you're taking over a website
- An overview of some of the commonest scenarios you'll encounter
- We're assuming you're taking over sole responsibility for all aspects of running a site
- This may be more detail than you need – you don't have to do everything that we talk about today
- We will be covering A LOT today – don't panic
- There's a [written checklist on our website here](#)



Safety warning

- Don't just log in and start making changes
- Moving from a very old version of WordPress to a new one is a BIG DEAL
- Updating plugins or themes that have not been updated in years is a BIG DEAL
- Take a backup first
- You may not be able to do everything that we talk about today
- You may need help from a professional for some of these things
- **DO NOT DO ANYTHING BEFORE THE END OF THIS WEBINAR!**





Logging in for the first time



- Dashboard
- Home
- Updates 14
- Posts
- Media
- Pages
- Comments 507
- Contact
- Appearance
- Plugins 6
- Users
- Tools
- Settings
- Collapse menu

[WordPress 5.7](#) is available! [Please update now.](#)

Dashboard

You've been using **What The File** for some time now, could you please give it a review at wordpress.org?

[Yes, take me there!](#) - [I've already done this!](#)

[Check out other Never5 plugins](#)

At a Glance

3 Posts	12 Pages
0 Comments	507 in moderation

WordPress 4.7.19 running [Eighteen tags](#) theme. Update to 5.7

[Akismet](#) has protected your site from 503 spam comments already. There's nothing in your [spam queue](#) at the moment.

Quick Draft

Title

What's on your mind?

Save Draft

Activity

Recently Published

Mar 16th 2016, 3:00 am [Prepping For Client Work And Meetings](#)

WordPress News

[The Month in WordPress: March 2021](#) 3rd April 2021



Logging in for the first time

- The core WordPress backend is always laid out the same
- The number of options that you see on the left-hand side will be different on different sites
- How the editing of pages works may be different depending on the theme and the age of the site
- The core functionality is constant
- If you know how to use one WordPress site you can work out how to use another one
- You cannot accidentally break your site just by logging into the backend



Notifications and error messages

The screenshot shows a WordPress dashboard for the site 'Awesome Tech Training'. The top navigation bar includes links for Home, Updates (14), Jetpack, Posts, Events, Media, Pages, Comments (1), Fluent Forms, WP Social Ninja, Content Locker, GDPR Cookie Consent, CartFlows, WooCommerce, Products, Analytics, WebToffee Import Export (Basic), Marketing, Elementor, Templates, WPForms, Appearance, and Plugins (12). The user is logged in as 'Howdy, Lorna Walker'.

Notifications and messages displayed on the dashboard:

- WordPress 5.9.2 is available!** Please update now.
- Dashboard:** We have introduced the multiple order bump feature. If your checkout page has the order bump feature enabled, you need to migrate an old order bump settings to the new multiple order bump settings. [Migrate Order Bump](#)
- CartFlows Pro:** You are using an older version of CartFlows Pro. Please update CartFlows Pro plugin to version 1.9.0 or higher.
- Elementor Data Updater:** Database update process is running in the background. Taking a while? [Click here to run it now](#)
- ANNOUNCEMENT: UPCOMING BREAKING CHANGE ON 15th MARCH** [Dismiss](#)
With the CAPTCHA 4WP plugin, you can add CAPTCHA to forms created by third-party plugins such as Contact Form 7 and WooCommerce. This is a premium feature. However, this feature was also working in the free edition. Therefore we are temporarily allowing it in the Free edition for a few more weeks before moving it to Premium, to give users who are already using it the time they need to take the necessary action. We will fix this and **this feature will stop working in the Free edition on 15th March**.
If you would like to continue using this functionality, please [upgrade to Premium before 15th March 2022](#).
Thank you for your understanding and for using our plugin.
- WP Social Ninja:** The WP Social Ninja - All-in-one Social Media Plugin for WordPress license needs to be activated. [Activate Now](#)
- WooCommerce database update required:** WooCommerce has been updated! To keep things running smoothly, we have to update your database to the newest version. The database update process runs in the background and may take a little while, so please be patient. Advanced users can alternatively update via [WP CLI](#).
[Update WooCommerce Database](#) [Learn more about updates](#)
- Your License Has Expired** [Renew your license today](#), to keep getting feature updates, premium support and unlimited access to the template library.
[Renew License](#)



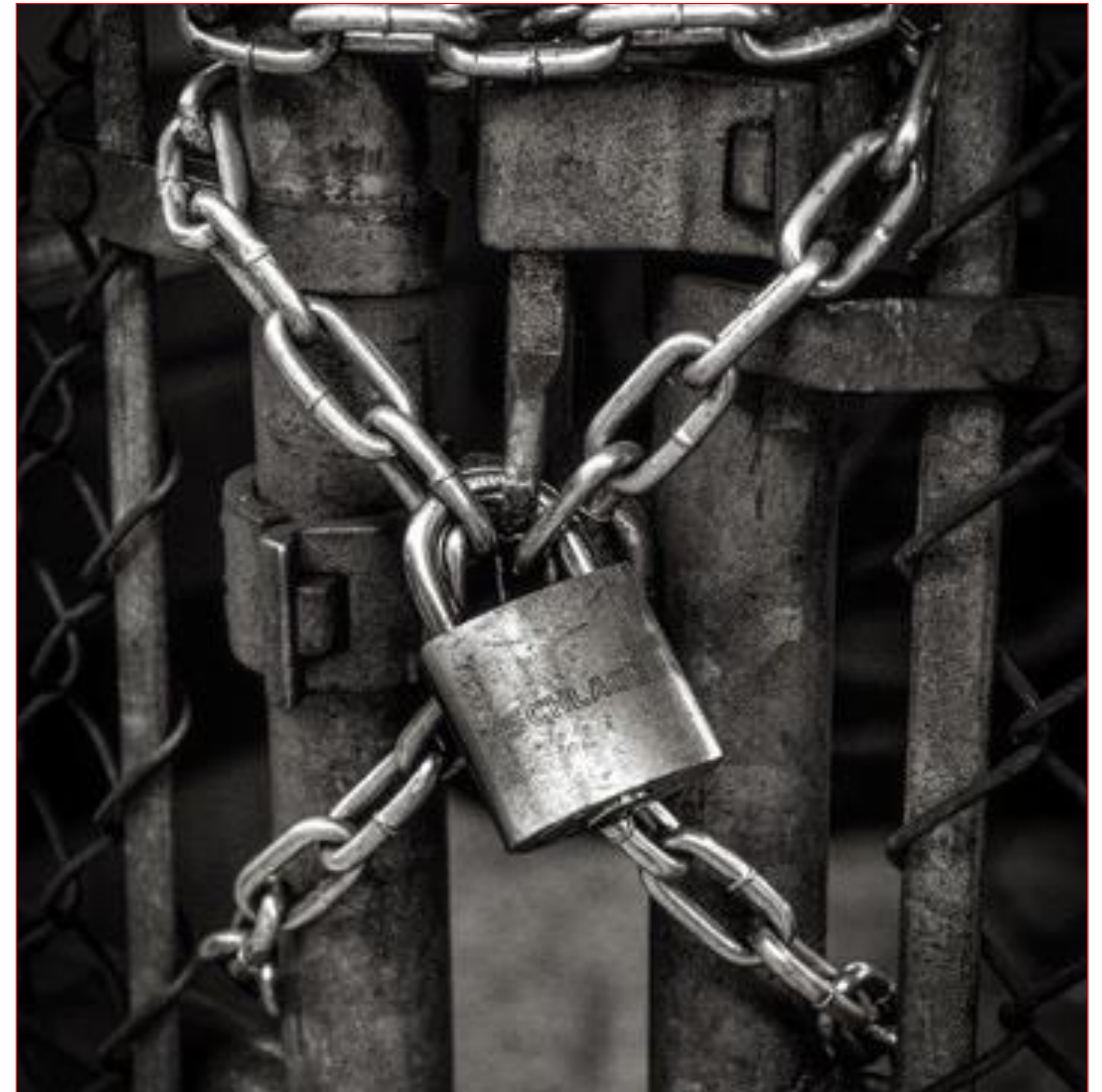
Security, hosting and backups





Making sure the site is secure and controlling access

- Set yourself up as an admin user
- Who else has admin access?
- Do you know who they all are?
- Remove anyone who doesn't need access
- Stop sharing login details and passwords
- Change your password
- If you need to give access to someone else, set them up as a user rather than sharing your details
- [We have another webinar specifically focused on WordPress site security later today / on demand](#)





Ensuring you have access to the hosting and domain

- Where is the site hosted?
- Do you have access to the hosting account?
- Where is the domain registered?
- Do you have access to the domain registration?
- Make sure neither of these things are in the control of someone who's left the organisation, your developers or another third party



Regular backups / installing a backup plugin

- Is there a development environment where you can make changes before pushing them through to the live site, or can you only make changes on the live site?
- Check whether the hosting company is regularly taking backups of the site
- Is there a backup plugin installed that enables you to take backups of the site yourself?
- If not then we recommend you install one yourself so you can take a backup of the site – UpdraftPlus is the one that we use
- Take a backup of the site before you make any further changes to it
- [Here's a video guide to installing and configuring Updraft Plus](#)



Getting to grips with the site's appearance





Elements of a WordPress site

WordPress version

- Core code that provides the foundations for the whole site

The theme

- Controls how the site is laid out and how the pages look

Pages and posts

- Contain the content of the site

Plugins

- Add functionality to the site

Widgets

- Add functionality to specific pages



What version of WordPress are you using?

- WordPress will tell you if there's a newer version that you could install via a message at the top of the admin console
- Click 'Updates' to see which version you're currently using

The screenshot shows the WordPress admin dashboard for 'Smart Vision Europe'. The top navigation bar includes a home icon, the site name, a refresh icon with '20', a speech bubble icon with '0', a '+ New' button, a checkmark icon with '2', and an 'Events' icon. The left sidebar menu is visible with items: Dashboard (selected), Home, Updates (20), Jetpack, LearnPress, Posts, Events, Media, and Pages. A red oval highlights a notification box at the top of the dashboard content area that reads: 'WordPress 5.9.2 is available! [Please update now.](#)' Below this, there are two other notification boxes: one for Stripe requiring WooCommerce 5.7 or greater, and another for a WooCommerce database update required, with buttons for 'Update WooCommerce Database' and 'Learn more about updates'.



Should you update your WordPress version?

- Generally it's a good idea to ensure you're running the latest version of WordPress as this helps to keep your site secure
- BUT if your site is using a very old version of WordPress then you should not simply update to the latest version as you may find that elements of your site do not work in the newer version
- If your site is still running a pre-Gutenberg version of WordPress then definitely get professional advice before updating WordPress (Gutenberg became the default editor in version 5)
- Make sure that you have a backup of the site before you make any changes to the WordPress version you're running

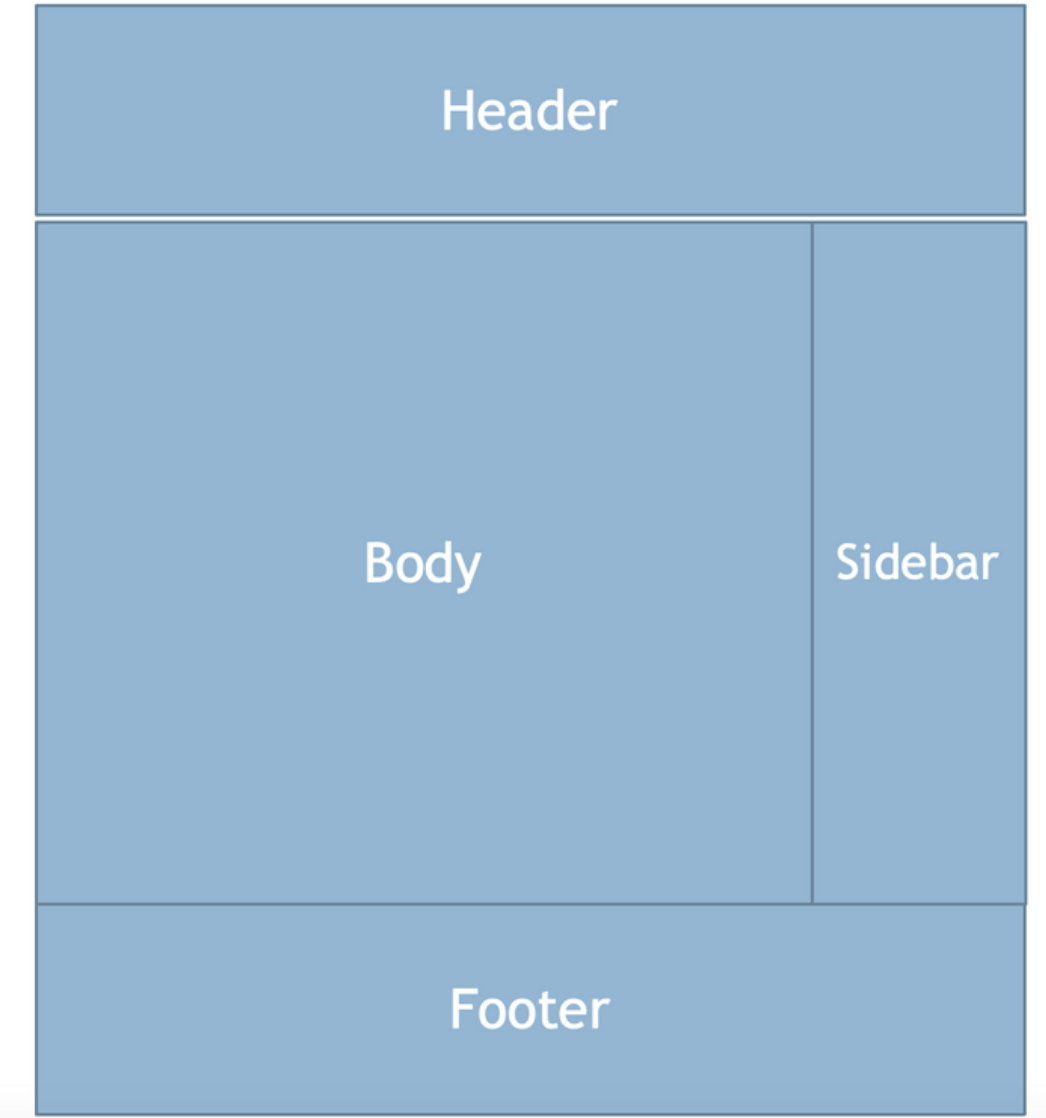
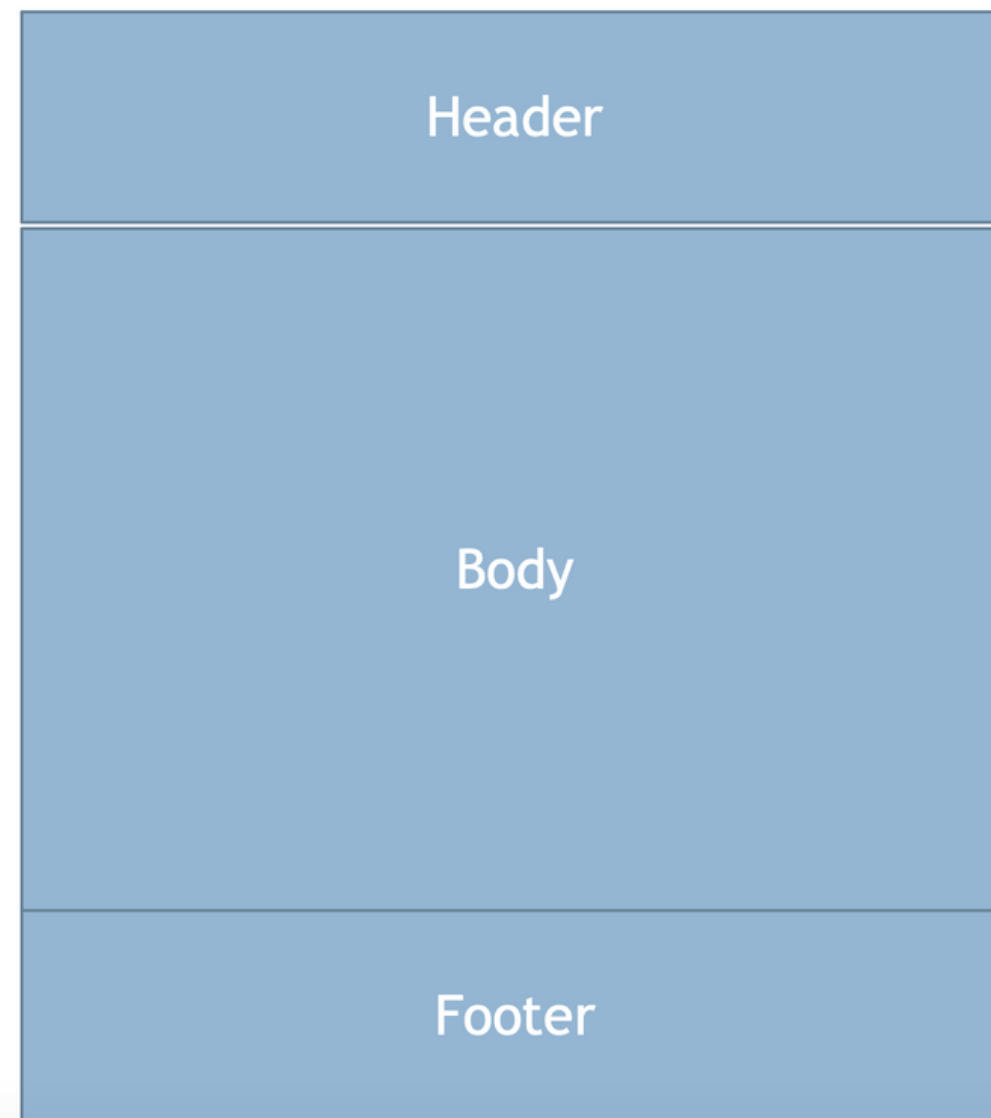


Understanding the theme

- Go to the Appearance menu and select the Theme option to see which theme your site has been built with
- Check whether the site is running a free, premium or a bespoke theme
- If it's a premium theme check whether there's an annual subscription that needs to be renewed
- Make sure you have access to the account that was set up with the theme developers
- Check the theme developers' website for documentation that will help you understand how the theme works
- Check YouTube to find videos showing you how the theme works
- Go to the Appearances menu and select the Customise option then go through each of the options in the Customise menu – this will help you start to understand which areas of the site you can control.
- VERY old sites (pre-2012) probably won't have the Customise option
- If you have a VERY new site built with a full site editing theme then you won't have the Customise option either



How WordPress pages are structured





How are the pages put together?

- Look at the list of pages in the backend of the site to see what content you have
- Click 'edit' to see how the pages are built – there are several possibilities
 - Classic WordPress interface
 - Gutenberg WordPress editor
 - Third party page builder such as Beaver Builder, Elementor or Site Origin
 - Page templates
 - A combination of these
- If the site is using a third party page builder then you'll need to learn how to use that in addition to understanding how the theme works
- Do your pages have sidebars? If so, can these be controlled via the theme customisation options?



Editing pages

- Things like simple text changes (e.g. changing a phone number, correcting a typo, adding a sentence of copy) and swapping images should be relatively straightforward
- Always preview any changes before updating the page, just to be on the safe side – you're not committed to any change until you click 'update'
- Changing the design and layout of pages (adding / removing sections, changing the order in which elements appear) can be more complicated
- If a page is built in a page builder such as Elementor you cannot then swap to editing it in Gutenberg
- In an ideal world you'd make significant changes in a development or staging copy of the site and test them there before deploying them to the live site
- Installing a [duplicate posts plugin](#) lets you make a copy of a page to play with, make sure you can do what you want to do then make changes on the live version of the page



Different types of content and how they are generated

- If you can't find a particular piece of content in the editor view of that page then there are some other options to consider
- Custom post types commonly used for content such as:-
 - Testimonials
 - Reviews
 - Team member bios
- Some pages are automatically generated and you can't edit them directly
- e.g. blog roll, event listing page
- Content can be generated and added via a plugin e.g. Events Manager, Facebook review plugin
- Content can be added via a shortcode
- Some themes have templates for particular types of page (e.g. front page) that are edited via the theme's own settings



Understanding the site's structure



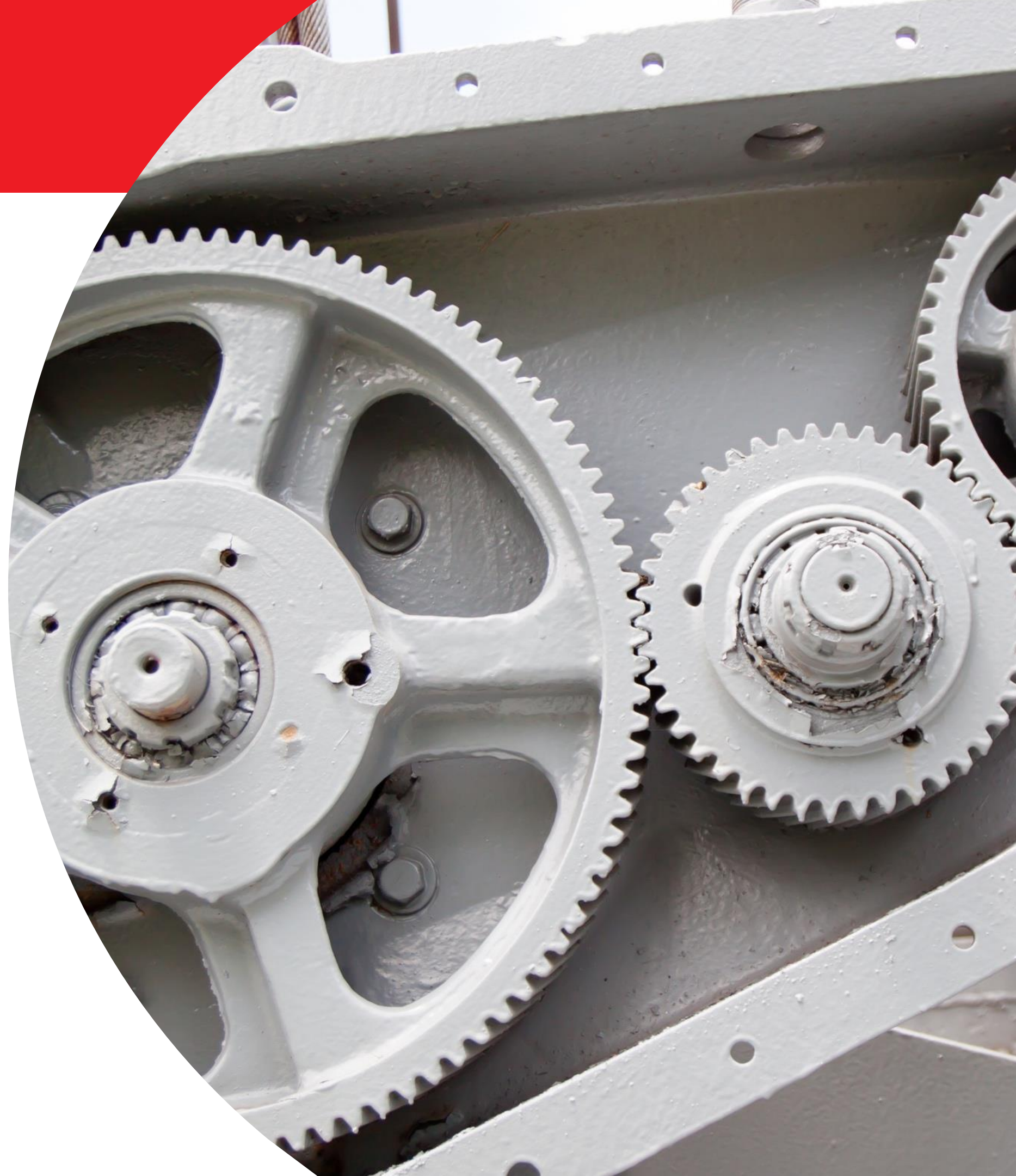


How does the navigation work?

- How many menus are there?
- Menus are always controlled in the same place in WordPress
- Appearance / menus
- Is there a different menu for mobile?
- Is a 'mega menu' running on the site?
- If so this could be controlled by the theme or by a separate mega menu plugin



Understanding the site functionality





What do the plugins do?

- Go to the plugins list in the backend of the site and look at what's been installed
- Check to see what each plugin does
- Does the site use premium versions of any plugins that have subscriptions that will need to be renewed at some point?
- Do you have access to the account with the plugin developer so you can renew the plugin when the time comes?
- Do your plugins need to be updated?
- Note, you should make sure you have a backup of the site before you start updating plugins and you should update them one at a time rather than all together
- Don't start deleting plugins unless you're very confident that they're not being used



What functionality is on the pages?

- Look at each pages on the frontend of the site and make a note of any additional functionality that you spot
 - Forms
 - ecommerce functionality
 - embedded social media feeds
 - Sliders
 - Videos
- Look at the backend of the pages that have additional functionality to find out how that functionality is being generated
- For example, what plugin is being used to generate the forms?



Is there any bespoke code

- Look in the appearances / themes section and see if the active theme is a child theme
- Have a look in appearance / customise / custom css (be very careful not to make any changes here unless you know what you're doing)
- Are there any plugins that were custom written for your site?
- Check the “Author” and “View details” links in the plugins list
- Do you have access to the developer if any of the bespoke code needs changing or if there are security problems?



Is the site working as it should?

- Fill in and submit the contact forms
- Where do the completed form entries go?
- Who has access to them?
- Are they being followed up?
- Are there any broken links on the site?
- <https://www.deadlinkchecker.com/>
- Are comments enabled on blog posts?
- Who is checking the comments to ensure that they're appropriate for publication?
- Comments are controlled in settings / discussion
- Who gets alerts if there's a problem with the site?
- Make sure you know who gets the admin emails
- Check this in settings / general



Identifying compliance and performance issues





Is the site GDPR compliant?

- Do you have a privacy policy on the site?
- Is the privacy policy still correct?
- Are the contact details of the company and the data protection officer correct?
- If you have a contact form is there an opt in tick box on it enabling people to consent to hearing from you?
- Does the contact form give people a link to the privacy policy?
- What user data is being stored in the backend of your site?
- Look at your form plugin to check whether form entry data is being stored in the backend of the site.
- If you're using an ecommerce plugin like WooCommerce check to see whether order data is being stored and for how long.
- Are you running a [cookie consent plugin](#) on the site?
- [Are you compliant with Google's consent mode 2?](#)



Are there issues with site speed?

- Use Google's [page speed insights tool](#) to check
- [Advice on how to speed up your site](#)
- We have a [webinar](#) on this later today!

PageSpeed Insights HOME DOCS

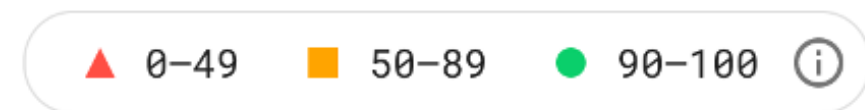
http://awesometechtraining.com/ ANALYZE

MOBILE DESKTOP

Requested URL redirected to: https://www.awesometechtraining.com/



https://www.awesometechtraining.com/





Ensuring third party integrations are working properly

- Is your site integrated with mailing services like Mailchimp or Constant Contact or another CRM system?
- Do you have access to the relevant third party system?
- Are you linking to your social media channels from your site?
- Check that the links are correct
- Are your social media channels being actively managed?
- Make sure you have log in access to the channels
- Ensure that anyone who's left the organisation no longer has access
- Do you have any tracking tags running on the site from any of your social channels such as a Facebook Pixel or LinkedIn Insight Tag?
- If so, check you have access to the relevant advertising accounts
- <https://builtwith.com/> can tell you what's running on your site



Is the information on the site correct and up to date?

- Are the contact details on your site correct?
- Look at the contact us page and also at any contact information in other areas such as the header, footer or privacy policy.
- If there's a 'Meet the team' page, do all of those people still work for you?
- Are their contact details correct?
- If you're selling online is your product list up to date? Are the prices correct?
- Look at the dates on your blogs – if no new blogs have been added to the site for months then consider hiding the blog (or the post dates) until you're able to add new content rather than give the impression that the site is not being actively managed.
- Check the date on the copyright notice in your footer if you have one.



Search performance





The importance of Google Analytics

- Is Google Analytics running on the site? If so, do you have access to the Google Analytics account?
- <https://builtwith.com/> will tell you if Google Analytics is running
- If you don't already have Google Analytics installed then you should set up an account and install it so you can start tracking the performance of your site.
- [Introduction to Google Analytics 4 webinar](#) regular live dates / on demand
- [Free GA4 resources](#)



Google Search Console

- Is the site authenticated in Google Search Console? If so, make sure that you have access to the Search Console Account.
- Identifies performance issues on your site and suggests how they could be fixed
- See which search queries are generating the most traffic to your site
- Submit a sitemap to help Google understand the structure of your site
- Check when this was last done
- Send you alerts when there is a problem with your site
- Check who gets these alerts
- See which other sites are linking to your site
- [How to set up Google Search Console / understanding how it can help you](#)
- Here's a [video guide to setting up a Google Search Console account](#)



Next steps





Priority order

1. Make sure that you have secure access to your site, the domain and the hosting
2. Install a backup plugin and take a backup – [video guide to installing UpDraft plus](#)
3. Check who has access – make sure you have your own login details and remove the access of anyone who doesn't need it any more
4. Understand how to make changes to your pages



Before you start doing anything...

- Just looking at pages won't change them – you have to make a change and click 'update' before your change will appear on the front of the site
- Updating plugins, themes or the WordPress version can potentially break your site, particularly if they have not been updated for a long time
- Deleting pages (or other content) or putting them to draft can change how your site looks on the frontend
- Removing or editing any custom code (particularly custom css that you might be able to access via the 'customization' options of your theme) can change how your site looks
- Removing or editing any theme files (via themes / editor) can completely break your site



Check out all the free WordPress resources on our website

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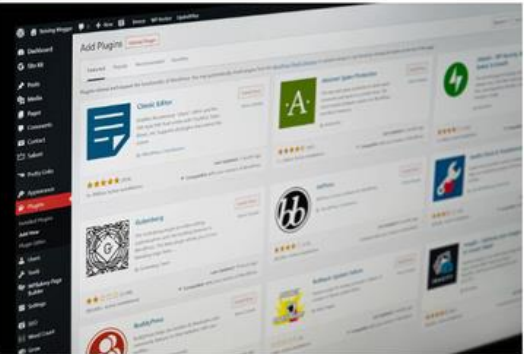
Training listed by date Training listed by topic

April 2024

Mon 8 April 2024, 10 – 11 am BST
08 Getting started with WordPress : FREE

This webinar will give you a general introduction to WordPress. It's aimed at people who either have an existing WordPress site that they're not confident using it, or those who want to build a new site using WordPress and want some guidance on how to get started. WordPress is the most widely used content management system in the world, but it's not always the most user friendly interface. Join us for this FREE webinar to learn more about WordPress, how it works and whether it's right for you.


[Buy tickets »](#)



Mon 8 April 2024, 12 – 1 pm BST
08 Everything you need to know before setting up a website : FREE

If you're thinking of setting up a new website, whether you're planning to build it yourself or hire someone to do it for you, then this webinar is for you. In this webinar we'll go right back to basics and walk you through the whole website development process from start to finish, outlining the key decisions you need to make at each stage. We'll help you understand what needs to be done, how much each element should cost, where you can do things yourself and where it's probably better to get expert help.

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