

Handing over a WordPress website.

WordPress has no transfer button, so this is four handovers: the domain, the hosting account, the admin logins and the licences. Tick each one off before the final invoice is paid.

The general version of this, for any platform, and the Squarespace, Wix and Shopify ones are at adamroe.co.uk/blog.

ACCOUNTS AND OWNERSHIP

- ☐ **The four accounts are written down: registrar, host, WordPress administrators, and every paid vendor**
Nothing inside WordPress records who owns the site, so the document you write is the record.
- ☐ **The owner has their own WordPress administrator account, created by them**
An administrator can install plugins, edit files, change settings and delete users. One named account per person, never a shared login.
- ☐ **Two-step authentication is on, and any generic "admin" username is renamed or gone**
WordPress hardening guidance: the default usernames are the ones attacked first.
- ☐ **The administration email in Settings, General is the owner's, and the confirmation link has been clicked**
The change does not take effect until the link in the new inbox is clicked. Until then the old address is still in force.

HOSTING AND BILLING

- ☐ **The hosting account is in the owner's name, or a new one is, with the site moved onto it**
WordPress.org does not cover hosting accounts. Every host has its own process, so ask that host in writing and do not assume it can be done.
- ☐ **The plan, the renewal date and the card are recorded, and the card is the owner's**
A card that expires on somebody else's account can take the site down with it.
- ☐ **The owner can raise a support ticket with the host in their own right**
The test of whose account it really is.
- ☐ **If the site was migrated, both URLs were changed in Settings, General, with no raw search and replace on the database**
WordPress warns that a database-wide find and replace can break serialised settings. Use Better Search Replace or WP-CLI.
- ☐ **Tools, Site Health, Info is copied into the handover pack**
Versions, server, database, active plugins and themes, in one paste.

DOMAIN AND EMAIL

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- ☐ **The domain registrant is the owner, not the developer**
For a .co.uk that is a Nominet registrant transfer, separate from moving registrar: £10 plus VAT however many names, accepted by the new registrant within five days.
 - ☐ **If the registrar is changing too, the lock is off and the transfer authorisation code is with the registrant**
A separate job from the change of owner. How long the code stays valid varies, so ask the registrar on the day.
 - ☐ **Auto-renew is on and the expiry date is in the owner's diary**
The domain carries the website and the email. Nobody should find out it lapsed from a customer.
 - ☐ **The live DNS zone is recorded before anything moves: A, www, MX, and every TXT record**
SPF, DKIM, DMARC and service verification all live in TXT records. Moving nameservers without the MX records is how a client's email goes down mid-handover.
 - ☐ **The site's outbound email is named: which service sends it and whose account that is**
WordPress leans on PHP mail by default, so most sites send through an SMTP plugin or a relay. Form enquiries dying quietly is the commonest post-handover complaint.
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DATA AND BACKUPS

- ☐ **A full backup, database plus files, taken before handover and held by the owner**
The database sits outside the WordPress directory, so downloading the folder is not a backup. Files means core, themes, plugins, uploads, wp-config.php and .htaccess.
 - ☐ **A scheduled backup the owner controls: weekly at least, daily for a busy or transacting site**
And always before an upgrade.
 - ☐ **It is written down that the host's server backup is not the owner's backup**
WordPress says it plainly: getting your site out of a host's backup takes a support request, so learn to back up and restore your own.
 - ☐ **The restore is tested, or the steps are written down: files first, then the database**
A backup nobody has restored is a guess.
 - ☐ **Tools, Export is kept as a second copy, with a note of what it is not**
The WXR file holds content and users. No theme, no plugins, no settings and none of the media files.
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PLUGINS AND LICENCES

- ☐ **Every premium plugin and theme is listed with its buyer, account, renewal date and cost**
Licences belong to an account, not to a website.
 - ☐ **Each licence the vendor allows to move has been moved**
Elementor has Transfer Subscription and Switch Account; WooCommerce.com moves ownership and billing together, and cannot be undone once accepted.
 - ☐ **Where a vendor allows no transfer, a replacement licence is bought in the owner's name**
Otherwise the plugin keeps working while updates and support quietly stop, which is a security problem rather than a cosmetic one.
 - ☐ **Who applies core, plugin and theme updates is decided and written down**
Core minor updates should stay on. Plugin and theme auto-updates are opt in per item, run twice a day by WP-Cron, so somebody has to switch on the ones that are wanted.
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- ☐ **Every paid service is on the owner's account and card: SMTP, off-site backups, CDN, security, uptime**
None of them are WordPress subscriptions, so none of them move on their own.

SEARCH AND ANALYTICS

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- ☐ **The owner is a verified owner in Search Console, and the old verification token is deleted**
Removing somebody as a user is not enough: with the token still in place they can verify themselves again.
 - ☐ **Any leftover verification is cleared from the site root and the SEO plugin's settings**
On WordPress the token is usually an HTML file nobody opens or a meta tag held in a plugin.
 - ☐ **The owner has Administrator on the GA4 account or property, and the tracking code points at it**
Adding or changing users needs the Administrator role, under Admin, Access Management.
 - ☐ **The live sitemap is confirmed, core's /wp-sitemap.xml or the SEO plugin's, and it is the one submitted**
Core has made one since 5.5, and most SEO plugins replace it.
 - ☐ **Redirects still work after any host or URL change**
WordPress has no redirects panel of its own, so they live in a plugin or the server config.

ACCESS CLEAN-UP, LAST

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- ☐ **Users reviewed: leavers removed, and anyone who does not need administrator moved down**
Do this once everything else is confirmed working, not before.
 - ☐ **The developer's credentials are rotated: SFTP or SSH, the database password in wp-config.php, and any API keys made for the build**
Use SFTP rather than FTP from here on, because the password is encrypted in transit.
 - ☐ **The developer's administrator account is removed, or reduced to what the ongoing arrangement needs**
And the owner holds the host and registrar logins.
 - ☐ **HTTPS is working, the certificate's renewal is owned, and FORCE_SSL_ADMIN and DISALLOW_FILE_EDIT are set where wanted**
Both are wp-config.php constants. The file editor allows code execution from the browser, so most sites are better without it.
 - ☐ **The things WordPress does not record are recorded: the CDN or Cloudflare account, and any staging site**
Whoever holds the CDN account controls DNS and the cache. Staging is a host feature, so note who can publish from it.

Take it, change it, use it in your own projects. No need to credit me. adamroe.co.uk/blog/wordpress-website-handover