Website handoff document and training checklist

A handoff document skeleton covering every account a client needs to own their site, plus a training session checklist.

Copy, adapt and send. Replace anything in [brackets] with your own details.

DOMAIN, DNS AND DELIVERY

- [ ] Registrar: [company]. Account owner: [client]. Renews: [date]. Auto-renew and lock: [on].
- [ ] DNS host: [company]. Can edit: [names]. Zone export saved at: [location].
- [ ] CDN or proxy (e.g. Cloudflare): [account owner]. Key settings: [SSL mode, cache rules].
- [ ] SSL: [issuer]. Renews: [automatically, by whom]. Expiry monitored by: [who].
- [ ] Mailboxes: [provider]. Site mail sent via: [SMTP or transactional service]. SPF/DKIM/DMARC: [set].

HOSTING AND BACKUPS

- [ ] Hosting: [company, plan]. Account owner: [client]. Support: [ticket or email]. PHP: [version].
- [ ] Backups: [where, how often, retention]. Restore steps: [link]. Last test restore: [date].

WORDPRESS AND SERVICES

- [ ] Admins: [one account per person, 2FA on]. Your access after handoff: [removed / support role].
- [ ] Paid plugins and theme: [name, license holder, renewal date, cost].
- [ ] Analytics and Search Console: owned by [client account], with you added as a user only.
- [ ] Support terms: [what is covered, response times, rate for extra work, how to request].

TRAINING SESSION

- [ ] Log in, reset a password and set up 2FA.
- [ ] Edit, preview and publish a page. Restore an earlier revision.
- [ ] Add a post with a featured image, category and alt text.
- [ ] Upload images at a sensible size and replace one without breaking the layout.
- [ ] Find and export form entries, and see where notifications go.
- [ ] What not to touch: theme files, builder global settings, updates without a backup.

SIGN OFF

- [ ] Client confirms every login works and has changed any password you set.
- [ ] Ownership of registrar, hosting, analytics and licenses sits with the client.
- [ ] Client gets an owner's manual: /design-field-kit/owner-manual/ on webdesignsurvivalist.com.