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**WordPress Developer Handoff Guide (Comprehensive)**



* **complete, pr ac tical guide for tr ansfer r ing a WordPress projec t from one team to another. It m erges str ategic, legal, oper ational, and technical**

**handover** **m ater ial into one definitive reference, with checklists and templates you can use imm ediately.**

* **successful handover is not just a tr ansac tion of files and passwords; it is a comprehensive process of tr ansfer r ing knowledge, responsibility,**

**and control. The stakes of a poorly executed handover are high: secur ity vulner abilities from linger ing access, oper ational downtim e due to unknown dependencies, legal liabilities from am biguous ownership, and escalating costs from undocum ented technical debt. This guide is designed to m itigate those r isks.**

**Use this as a living docum ent dur ing the handover. Br ing it to the handover m eeting, check off items as you ver ify them , and keep the inventor ies up to date.**



**How to use this guide**



**Star t with the Quickstar t and Final Handover Checklist to fr am e the tr ansfer.**



**Wor k top-to-bottom . Each sec tion ends with concrete ac tions and data to collec t.**



**Log ever y credential, license, and account in the Master Inventor y table.**



**Secur ity Protocol: Share credentials securely (e. g. , via a password m anager shared vault like 1Password/Bitwarden or a one-tim e secret link). Never send passwords via email.**



**Imm ediate Action: Change passwords and enable 2FA (Two-Fac tor Authentication) as soon as access is confir m ed.**



**Final Step: Remove the outgoing developer ʼs access ever ywhere before you sign off.**



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**Quickstart & Success criteria**

**Minimum bar for a successful handoff:**



**Ownership: You have full adm inistr ative and legal control of the dom ain, DNS, hosting, WordPress, and all integr ated ser vices. Billing and renewal responsibility are in your accounts.**



**Access: All credentials are in your password m anager. Ever y adm in login tested successfully.**



**Secur ity: Passwords rotated, 2FA enabled, previous access fully revoked, and API keys regener ated where applicable.**



**Backups: Ver ified wor king backups (stored off-site) and a docum ented, tested restore procedure.**



**Operations: Clear, docum ented deploym ent process, update cadence, and monitor ing in place.**



**Knowledge: Architec ture, custom iz ations, dependencies, and “quir ks” are docum ented; tr aining delivered.**



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**Strategic overview & History**

**Understand the pur pose and histor y before changing anything. The technical architec ture can only be judged against the business goals it was intended to achieve.**



**Core Purpose: What problem does the site solve? Pr im ar y objec tives (e.g. , e-comm erce, lead gen, publishing).**



**Audience: Who is the audience, and how has it evolved? What user personas were defined?**



**Histor y & Evolution: Key m ilestones, m ajor feature additions, pivots, redesigns, or platfor m m igr ations.**



***Rationale:* A projec t's histor y often reveals its comprom ises. Understanding histor ical pivots (e.g. , a site that had e-comm erce " bolted on" later ) helps uncover technical debt and anticipate areas of fr agility.**



**KPIs: KPIs for success (conversions, revenue, engagem ent) and how theyʼ re m easured.**



**Business Rules & Compliance: Any unique business rules, compliance constr aints (e. g. , industr y-specific regulations), or seasonal patter ns.**

**ACTIONS:**



**Capture the answers above in the projec t notes.**

**Identify any m isalignm ents between cur rent architec ture and business goals.**

**Stakeholders & roles**

**Map the influence and responsibility networ k to ensure clear communication.**



**Key Personnel: Decision m akers and points of contac t (produc t, content, m ar keting, tech).**



**Wor kflows: Approval wor kflow for content and technical changes; escalation path for incidents.**



**Histor ical Knowledge: Who m anaged discover y/planning? (These individuals can clar ify histor ical decisions and or iginal requirem ents).**



**Post-Handover Managem ent: Who will own the site post-handover (content m anagem ent, technical m aintenance, business decisions).**

**ACTIONS:**



**Record stakeholder list with roles and contac t info.**

**Agree on post-handover suppor t window (dur ation, scope, r ates) and communication channels.**

**Ownership & legal**

**This is cr itical. Failure to secure unam biguous ownership of all assets can have catastrophic long-ter m consequences.**



**Intellectual Proper ty (IP): Wr itten confir m ation of 100% ownership of website, content, custom code, gr aphics, design elem ents, and data upon final paym ent. This is non-negotiable. Identify exceptions (e. g. , stock photos). Licenses: List of all prem ium them es/plugins and other software licenses.**



***Rationale:* Ac tive licenses are crucial for receiving secur ity updates and suppor t. Expired licenses leave the site vulner able. Detail tr ansfer or repurchase requirem ents.**



**Contracts and SLAs: Ongoing obligations (hosting, m aintenance, suppor t); renewal dates, costs, and billing contac ts.**



**Pr ivacy Compliance (GDPR/CCPA): Data collec tion points (for ms, e-comm erce), PII (Personally Identifiable Infor m ation) stor age location and secur ity, retention policies, cookie consent m echanisms, and data shar ing agreem ents.**

**ACTIONS:**



**Secure wr itten confir m ation of IP tr ansfer.**

**File copies of agreem ents; update billing to new owner.**

**Populate license inventor y (Appendix) with keys, renewal dates, and accounts.**

**Review pr ivacy compliance docum entation.**

**Domain & DNS**

**Control over the dom ain registr ar and DNS is par amount. Losing control can result in the loss of the dom ain nam e.**



**Registrar : Provider (e.g. , GoDaddy, Nam echeap), account owner, renewal date, and auto-renew status.**



**DNS Provider : (e.g. , registr ar, Cloudflare, etc. ) and complete record set (A, AAAA, CNAME, MX, TXT).**



**Em ail Secur ity Records: SPF, DKIM, DMARC (essential for em ail deliver ability).**



**Scope: Subdom ains, redirec ts, staging dom ains, and special rules.**

**ACTIONS:**



**Gain registr ar and DNS adm in access; tr ansfer account ownership and billing.**

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**Enable 2FA on registr ar and DNS accounts imm ediately.**

**Expor t cur rent DNS zone file and attach to this docum ent.**

**Hosting & server infrastructure**

**The hosting environm ent dic tates per for m ance, secur ity, and scalability.**



**Provider & Plan: Hosting provider, plan nam e, cost, renewal date, and geogr aphic region.**



**Environm ent Type: (Shared, VPS, Dedicated, Managed WordPress).**



***Rationale:* This defines the level of control and per for m ance isolation (e. g. , Shared hosting r isks " noisy neighbors" ; Managed hosting m ay restr ic t plugins).**



**Resource Lim its: CPU, RAM, stor age, bandwidth. Crucially, PHP m emor y lim its and execution tim e lim its (insu fficiency causes er rors).**



**Ser ver Stack & Versions: OS, Web ser ver (Apache/Nginx), PHP + required extensions, MySQL/Mar iaDB. Control panel (cPanel/Plesk/custom ).**



**Ser ver-level Secur ity: Web Application Firewall (WAF/ModSecur ity), firewall rules, IP restr ic tions, and allowlists.**

php.ini .htaccess nginx.conf



**Custom Configurations: Any modified** **settings, custom** **or** **rules.**

**ACTIONS:**



**Ver ify access to hosting dashboard and control panel.**

**Enable 2FA on the hosting account.**

**Docum ent any non-standard ser ver configs and required PHP extensions (crucial for future m igr ations).**

**Database access & structure**

**The database stores all content, settings, and user infor m ation.**



**Connection Details: DB host, por t, engine/version, database nam e(s), users and pr ivileges.**



**Access Method: (phpMyAdm in, Adm iner, CLI) and credentials.**



**Structure: Any custom tables or stored procedures beyond standard WordPress schem a (docum ent pur pose and schem a).**



**Maintenance: Optim iz ation procedures or cleanup routines for logs/tempor ar y data.**

**ACTIONS:**



**Per for m a read-only smoke check of DB access.**

**Expor t schem a for reference.**

**Rotate database user passwords.**

**WordPress access & user management**

**Ensure a clean audit tr ail and secure access control by enforcing the Pr inciple of Least Pr ivilege (PoLP).**



**New Adm inistrator Account: Provide a NEW adm inistr ator account for the new owner/team . Do not re-use existing logins.**



**User Inventor y: Review all users and roles (Adm ins, Editors, Authors, etc. ). Identify accounts to remove or demote.**



**PoLP Enforcem ent: Ensure users only have the m inimum access required for their role (e. g. , wr iters do not need plugin installation access).**



**Secur ity Features: 2FA enforcem ent, login restr ic tions (IP whitelisting, login attempt lim its), password policies.**

**ACTIONS:**



**Create and test new adm in(s).**

**Enable and enforce 2FA for all adm in/editor roles.**

**Rotate passwords for all necessar y ser vice accounts.**

**Remove previous developer/adm in access after confir m ation.**

**Server access (FTP/SFTP/SSH)**

**Direc t file system access is necessar y for advanced troubleshooting, deploym ent, and m anaging per m issions.**



**Connection Details: SFTP/SSH host, por t, users/keys, and required secur ity protocols.**



**File Structure: Docum ent root path, location of logs, backup direc tor ies, symlinks.**



**Perm issions: Special file per m issions (ownership settings, per m issions for uploads/cache direc tor ies).**

authorized\_keys



**SSH Specifics: Sudo pr ivileges and restr ic tions; location of** **.**

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**ACTIONS:**



**Exchange SSH public keys via a secure channel; validate login and per m issions.**

**Store keys and connec tion profiles in your password m anager.**

**Remove previous developer 's SSH keys and FTP accounts.**

**Email configuration**

**Docum ent both dom ain em ail hosting (m ailboxes) and tr ansac tional em ail paths (website-sent em ails).**



**Dom ain Em ail Hosting: Where m ailboxes are hosted (e.g. , Google Wor kspace/365/hosted). Adm in access, account list, alias/forward rules.**



**Transactional Em ail Path: How the website sends em ails (WordPress default m ail, SMTP plugin, or ser vice like SendGr id/Postm ar k).**



**Credentials/API Keys: SMTP settings or API keys for the tr ansac tional ser vice.**

**ACTIONS:**



**Ver ify SPF, DKIM, DMARC records are cor rec tly configured (See Dom ain & DNS sec tion).**

**Docum ent SMTP settings and r ate lim its.**

**Regener ate tr ansac tional em ail API keys or SMTP passwords.**

**Technical Architecture: Themes, Plugins, and Custom Code**

**Understanding how the website was built is a prerequisite for m aintaining and extending it. This sec tion creates the technical bluepr int.**

**Source Code Version Control (Git)**

**The use of Git is a hallm ar k of professional developm ent.**



**Repositor y: Location (GitHub, Bitbucket, GitLab) and access.**



***Rationale:* The absence of version control is a m ajor red flag, suggesting r isky " cowboy coding" pr ac tices (e.g. , editing live via FTP).**



**Branching Model: Str ategy used (e. g. , GitFlow, feature br anches). Which br anch represents produc tion?**



**Histor y: Confir m the repositor y contains the complete comm it histor y.**

**Theme Structure**

**The them e controls visual presentation. How it is struc tured impac ts future updates.**



**Active Theme: Is it comm ercial (provide source/license) or custom ?**



**Parent/Child Usage: Confir m a child them e is used for all custom iz ations.**



**CRITICAL RISK: Modifications m ade direc tly to a parent them e will be overwr itten dur ing updates. If the parent them e is edited, the site becom es difficult or impossible to update safely.**



**Customization Locations: Where custom CSS, JavaScr ipt, and PHP are stored.**

**Plugin Ecosystem**

**Plugins add func tionality but also complexity and potential points of failure.**



**Inventor y: Complete list (ac tive/inac tive) with version, pur pose (r ationale for choice), prem ium /free status, and license details.**



**Known Issues: Any known conflic ts or per for m ance bottlenecks.**



**Custom Plugins: Any plugins developed specifically for the site. Where is the source code and docum entation?**

**Custom Development & Content Structure**

functions.php



**Code Locations: Custom PHP in** **,** **code snippets plugins,** **or custom them e files.**



**Content Structure: Custom post types (CPTs), taxonom ies, and custom fields (e. g. , ACF). How were they created (plugin or code)? How are configur ations m anaged (e. g. , ACF JSON sync)?**



**Page Builders: If used (e.g. , Elem entor, Divi), docum ent global settings and templates.**



**Coding Standards: Were WordPress Coding Standards followed? Is the code well-comm ented?**



***Rationale:* Uncomm ented code is significantly more expensive and r isky to m aintain.**

**ACTIONS:**



**Populate the Plugin & Them e Audit table (Appendix), highlighting r isks.**

**Ver ify child them e usage and integr ity of parent them e files.**

**Confir m access to the Git repositor y and understand the br anching str ategy.**

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**Third-party services & integrations**

**Moder n websites are ecosystems of interconnec ted ser vices. Each requires ownership tr ansfer.**



**Inventor y: Comprehensive list of all integr ated ser vices:**



**Paym ents (Str ipe/PayPal), CDN/WAF (Cloudflare), Em ail Mar keting (Mailchimp), CRM (Salesforce/HubSpot), Analytics (GA/GTM), Search, Maps, For ms, Shipping/Tax, Tr ansac tional Em ail (SendGr id), etc.**



**For each ser vice: Adm in access, API keys/tokens, billing ownership, renewal dates, integr ation m ethod, and tr ansfer steps.**



***Rationale:* Legal and adm inistr ative ownership must be tr ansfer red, not just login details.**

**ACTIONS:**



**Tr ansfer ownership of all third-par ty accounts.**

**Enable 2FA on all third-par ty ser vices.**

**Regener ate all API keys and tokens after ownership tr ansfer.**

**Update webhooks and callback URLs as needed.**

**Backups & disaster recovery**

* **robust backup str ategy is the single most impor tant defense against catastrophic events.**



**Backup Solutions: (Host level, plugin (e. g. , Updr aftPlus), third-par ty). Relying on a single m ethod is r isky.**



**Scope & Schedule: What ʼs included (files, DB, both). Frequency and retention policy.**



**Storage Locations: Where are backups stored?**



**CRITICAL: Backups must be stored off-site (e. g. , S3, Dropbox, Google Dr ive). Backups stored only on the sam e ser ver are useless if the ser ver fails.**



**Restoration Procedure: A docum ented, step-by-step full restor ation procedure.**



**Testing: Date of the last successful restore test. An untested backup str ategy is not a reliable str ategy.**

**ACTIONS:**



**Ver ify off-site backup stor age is configured and wor king.**

**Per for m a test restore on a staging environm ent to validate backup integr ity and the procedure.**

**Security posture**

* **proac tive secur ity posture is a fundam ental requirem ent of ownership.**



**Secur ity Tools: Secur ity plugins (Wordfence, Sucur i, iThem es Secur ity) and key configur ations (Firewall rules, m alware scanning schedules, login secur ity).**



**SSL/TLS: Provider, renewal process (confir m auto-renewal is ac tive), and cer tificate monitor ing. An expired SSL cer tificate will kill tr affic.**



**Access Control: Adherence to the Pr inciple of Least Pr ivilege (PoLP).**



**Secur ity Histor y: Past incidents (breaches, m alware infec tions), resolutions, and preventive m easures implem ented.**



**Monitor ing: File integr ity monitor ing and suspicious ac tivity detec tion.**

**ACTIONS:**



**Review and harden secur ity plugin configur ations and WAF/CDN firewall rules.**

**Ver ify SSL cer tificate validity and auto-renewal.**

**Audit user roles and per m issions.**

**Performance & caching**

**Website speed is cr itical for user exper ience and SEO.**



**Caching Layers: Identify all ac tive layers: Plugin (WP Rocket/W3TC), Ser ver-level (Redis/Mem cached/Var nish), CDN caching, and Browser caching settings.**



**Cache Purge Procedures: Step-by-step process to clear all cache layers. Autom ated cache clear ing tr iggers/hooks.**



***Rationale:* Essential for troubleshooting when changes do not appear on the live site.**



**Optim izations: Im age optim iz ation/compression, asset m inification/concatenation, database optim iz ation.**

**ACTIONS:**



**Docum ent the exac t steps required to " clear all caches" across ever y layer (Plugin, Ser ver, CDN).**

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**Review CDN configur ation and page rules.**

**Analytics & SEO**

**Tools for understanding tr affic, user behavior, and search per for m ance.**



**Access: Adm inistr ative access to Google Analytics (GA4), Google Tag Manager (GTM), and Google Search Console (GSC).**



**Tracking Implementation: E-comm erce tr acking, custom events, goals, and cross-dom ain tr acking.**



**SEO Configuration: SEO plugin used (Yoast/RankMath), XML sitem ap location, m eta templates, schem a m ar kup implem entation.**



**Status: Cur rent r ankings and any histor y of Google penalties or m anual ac tions.**

**ACTIONS:**



**Ver ify proper ty ownership and adm inistr ative access to all tools.**

**Confir m data streams are ac tive.**

**Capture baseline m etr ics before m aking changes.**

**Environments, version control & deployment**

**The process of moving changes to the live site is r isk-prone. A disciplined, docum ented wor kflow is essential for stability.**

**Environments**



**List: Developm ent and Staging sites (URLs, access details).**



***Rationale:* A staging site is crucial for testing updates safely. The absence of one indicates high-r isk pr ac tices (testing on produc tion).**



**Sync Procedures: How environm ents are synchronized (files and database).**

**Version Control (Git)**



***See also Technical Architecture section***



**Repositor y Access & Branching Model.**

**Deployment Process**



**Procedure: The exac t, step-by-step process from comm it to produc tion (m anual vs. autom ated/CI/CD).**



**RISK: An ad-hoc, undocum ented, m emor y-based process (e. g. , " I FTP these three files. . ." ) is fr agile, highly susceptible to hum an er ror, and a m assive oper ational r isk.**



**Database Changes: How database changes are m anaged and m igr ated between environm ents (e. g. , m igr ation scr ipts, plugins like WP Migr ate DB Pro). DB sync is complex and must be docum ented.**



**Checklists: Pre-deploy testing checklist and rollback procedures for failed deploym ents.**

**ACTIONS:**



**Docum ent an end-to-end deploym ent runbook (See Appendix for template).**

**Confir m the staging environm ent is func tional and synchronized.**

**Str ic tly avoid m aking changes via FTP direc tly to produc tion.**

**Documentation & training**

**Comprehensive docum entation and tr aining are the br idge to confident, independent m anagem ent.**



**Existing Docum entation: Technical specs, architec ture diagr ams, adm in user m anuals, br and/style guides. Where is it stored?**



***Rationale:* The existence and quality of docum entation are strong indicators of a projec t's health.**



**Training: Video walkthroughs for common tasks (publishing content, m anaging produc ts) and custom wor kflows.**



**Known Issues: Docum entation of known bugs and technical debt.**

**ACTIONS:**



**Consolidate all docum entation in a centr al location (e. g. , with the repositor y or a knowledge base).**

**Schedule a live tr aining/Q&A session.**

**Maintenance & monitoring**

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* **website requires continuous care. Outdated software is the leading cause of WordPress vulner abilities.**



**Update Cadence: Established schedule for WordPress core, them e, and plugin updates.**



**Testing Procedures: Updates must be tested on staging before being applied to the live site.**



**Monitor ing: Uptim e monitor ing (e.g. , Uptim e Robot, Pingdom ), per for m ance monitor ing, and er ror logging.**



**Aler ts: Who receives aler ts if the site goes down or er rors occur ?**

**ACTIONS:**



**Establish a regular m aintenance schedule and testing process.**

**Set up monitor ing tools and configure aler ting thresholds/recipients.**

**Final handover checklist**

**Use this on handover day. Confir m each item before signing off.**



**Schedule and conduc t the for m al handover m eeting.**

**Ver ify Admin Access (Log into ever y ser vice):**

**Dom ain Registr ar**

**DNS Provider (e. g. , Cloudflare)**

**Hosting Control Panel**

**WordPress Adm in Dashboard**

**SFTP/SSH**

**Database (e. g. , phpMyAdm in)**

**Em ail Ser vices (Dom ain and Tr ansac tional)**

**CDN/WAF**

**Analytics & SEO Tools (GA, GSC, GTM)**

**Paym ent Gateways**

**Mar keting/CRM tools**

**Git Repositor y**

**All other third-par ty ser vices listed in the Inventor y.**

**Secure Accounts:**

**Change ALL passwords and store them in a secure password m anager.**

**Rotate ALL API keys and tokens.**

**Enable 2FA on all ser vices that suppor t it.**

**Revoke Previous Access:**

**Remove/demote the previous developer ʼs access from ALL systems listed above.**

**Validate Operations:**

**Validate backups are running and stored off-site.**

**Per for m a test restore on staging.**

**Smoke-test cr itical user jour neys (purchase/checkout, contac t for ms, login, search).**

**Confirm Configuration:**

**Confir m monitor ing/aler ts are going to the cor rec t recipients.**

**Update the Master Inventor y with final ownership status and renewal details.**

**Exit interview questions**

**Ask these open-ended questions to uncover “ unknown unknowns” and institutional knowledge often m issed in checklists.**



**Fragility: What do you consider the most fr agile or complex par ts of the site? Are there any known pitfalls or stability issues?**



**Technical Debt: If you had more tim e or budget, what would you improve or refac tor first, and why? (This reveals the developer 's assessm ent of technical debt).**



**Quir ks & Wor karounds: Are there any quir ks, oddities, or m anual wor karounds we absolutely must know about? (e. g. , " To update X, you have to do this one weird thing first." ) This is often the most valuable question.**



**Lessons Learned: What were the biggest challenges dur ing developm ent (plugin conflic ts, br ittle integr ations, environm ent gotchas)?**

**What lessons did you lear n?**



**Appendix: Inventories & templates**

**Use these tables as your single source of truth. Keep them cur rent.**

**Master Credentials & Services Inventory**

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**Instructions: Fill a row for ever y integr ation. Use a secure m ethod for shar ing credentials. After tr ansfer, regener ate API keys/tokens and m ar k status as Completed.**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  | **Password/Key** | | **Renewal** | **Transfer** | |  |
| **Ser vice/Platform** | **Purpose** |  | **Login URL** | **Usernam e/Email** | | **Cost** | **Owner** |  |  |  |
|  |  |  |  |  | **Location** |  | **Date** | **Status** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **WordPress** |  |  | **dom ain. com /wp-** |  | **Password** |  | **New** |  | |  |
|  | **CMS** |  |  | **new\_adm in\_user** | | **—** | **—** |  |
| **Adm in** |  |  | **adm in** |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Dom ain** | **Dom ain** |  |  |  | **Password** |  | **New** |  | |  |
|  |  |  | **[URL]** | **[Em ail]** |  | **$/yr** | **YYYY-MM-DD** |  |
| **Registrar** | **Control** |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **Password** |  | **New** |  | |  |
| **DNS Provider** | **DNS/WAF/CDN** | | **[URL]** | **[Em ail]** |  | **$/mo** | **Monthly** |  |
|  |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **Password** |  | **New** |  | |  |
| **Hosting** | **Ser ver/cPanel** | | **[URL]** | **[Em ail]** |  | **$/yr** | **YYYY-MM-DD** |  |
|  |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | **New** |  | |  |
| **SFTP/SSH** | **File Access** | | **[Host/IP]** | **[User ]** | **SSH Key/PM** | **—** | **—** |  |
|  |  |  |  |  |  |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **Password** |  | **New** |  | |  |
| **Database** | **Data Stor age** | | **[URL/Host]** | **[User ]** |  | **—** | **—** |  |
|  |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **Password** |  | **New** |  | |  |
| **Email (Domain)** | **Mailboxes** | | **[URL]** | **[Em ail]** |  | **$/mo** | **Monthly** |  |
|  |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Email** | **Website** |  |  |  |  |  | **New** |  | |  |
|  |  |  | **[URL]** | **[Em ail]** | **API Key in PM** | **$/mo** | **Monthly** |  |
| **(Transactional)** | **Em ails** |  |  |  |  |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **Password** |  | **New** |  | |  |
| **Backup Ser vice** | **Backups** |  | **[URL]** | **[Em ail]** |  | **$/mo** | **Monthly** |  |
|  |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Analytics** |  |  |  |  | **Password** |  | **New** |  | |  |
|  | **Tr acking** |  | **[URL]** | **[Em ail]** |  | **—** | **—** |  |
| **(GA/GTM)** |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **Paym ent** |  |  |  |  | **Password** |  | **New** |  | |  |
|  | **Paym ents** | | **[URL]** | **[Em ail]** |  | **Fees** | **—** |  |
| **Gateway** |  |  |  |  | **Manager** |  | **Owner** | **Pending** | |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  | **Version** |  |  |  | **Password** |  | **New** |  | |  |
| **Git Repositor y** |  |  | **[URL]** | **[Em ail]** |  | **$/mo** | **Monthly** |  |
|  | **Control** |  |  |  | **Manager/SSH** |  | **Owner** | **Pending** | |  |
| **Plugin & Theme Audit & Risk Assessment** | | | |  |  |  |  |  |  |  |
|  |  |  |  |  |  | **Renewal** |  |  |  |  |
| **Component** | **Type** | **Version** | **Purpose** | **Prem ium?** | **License Status** |  | **Notes/Risks/Dependencies** | | |  |
|  |  |  |  |  |  | **Date** |  |  |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  | **Parent** |  | **Base** |  |  |  | **Core visual fr am ewor k. DO** | | |  |
| **[Them e Nam e]** |  | **x. x. x** |  | **Prem ium** | **Ac tive** | **YYYY-MM-DD** | |  |  |  |
|  | **Them e** |  | **fr am ewor k** |  |  |  | **NOT edit direc tly.** |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **[Child Them e** | **Child** |  |  |  |  |  | **All custom iz ations** |  |  |  |
|  |  | **x. x. x** | **Custom iz ations** | **Custom** | **N/A** | **N/A** |  |  |  |  |
| **Nam e]** | **Them e** |  |  |  |  |  | **(CSS/PHP) live here.** |  |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  |  |  |  |  |  | **Cr itical for sales; complex** | | |  |
| **WooComm erce** | **Plugin** | **x. x. x** | **E-comm erce** | **Free** | **N/A** | **N/A** | **settings. Test updates** |  |  |  |
|  |  |  |  |  |  |  | **thoroughly.** |  |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  |  |  |  |  |  | **Firewall rules configured. Do** | | |  |
| **Wordfence** | **Plugin** | **x. x. x** | **Secur ity/WAF** | **Prem ium** | **Ac tive** | **YYYY-MM-DD** | |  |  |  |
|  |  |  |  |  |  |  | **not deac tivate.** |  |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  |  |  |  |  |  | **Key for site speed. Purge** | | |  |
| **WP Rocket** | **Plugin** | **x. x. x** | **Caching** | **Prem ium** | **Ac tive** | **YYYY-MM-DD** | |  |  |  |
|  |  |  |  |  |  |  | **after deploym ent.** |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | **CRITICAL RISK: Site** |  |  |  |
|  |  |  |  |  |  |  | **depends on this. Cannot** | | |  |
| **ACF PRO** | **Plugin** | **x. x. x** | **Custom fields** | **Prem ium** | **Expired/Missing** | **YYYY-MM-DD** | |  |  |  |
|  |  |  |  |  |  |  | **update without a valid** |  |  |  |
|  |  |  |  |  |  |  | **license.** |  |  |  |
|  |  |  |  |  |  |  |  | |  |  |
|  |  |  |  |  |  |  | **Indicates site m ay not be** | | |  |
| **Classic Editor** | **Plugin** | **x. x. x** | **Editor UI** | **Free** | **N/A** | **N/A** | **compatible with Block Editor** | | |  |
|  |  |  |  |  |  |  | **(Technical Debt).** |  |  |  |

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main production

**/**

**.**

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**Server & Infrastructure Details**

|  |  |  |
| --- | --- | --- |
| **Component** | **Details** | **Notes** |
|  |  |  |
| **Hosting Plan** | **Shared/VPS/Dedicated/Managed** | **Resource lim its (CPU, RAM, Stor age)** |
|  |  |  |
| **OS** | **Linux/Windows + version** |  |
|  |  |  |
| **Web Ser ver** | **Apache/Nginx + version** | **Configur ation file location (. htaccess/nginx. conf)** |
|  |  |  |
| **PHP Version** | **Version** | **php. ini location, m emor y lim it, execution tim e lim it** |
|  |  |  |
| **PHP Extensions** | **List of required extensions** | **Cr itical for specific plugin func tionality** |
|  |  |  |
| **Database** | **MySQL/Mar iaDB + version** |  |
|  |  |  |
| **Ser ver Caching** | **Redis/Mem cached/Var nish** | **Configur ation details** |

**DNS Records Snapshot**

***Attach exported Zone File.***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Nam e** | **Type** | **Value** | **TTL** | **Notes (Purpose)** |
|  |  |  |  |  |
| **@** | **A** | **[IP Address]** | **Auto** | **Main website ser ver** |
|  |  |  |  |  |
| **www** | **CNAME** | **@** | **Auto** | **Redirec t/Alias** |
|  |  |  |  |  |
| **@** | **MX** | **m ail. ser ver. com** | **Auto** | **Em ail routing** |
|  |  |  |  |  |
| **@** | **TXT** | **v=spf1. . .** | **Auto** | **Em ail Secur ity (SPF)** |
|  |  |  |  |  |
| **selec tor. \_dom ainkey** | **TXT** | **v=DKIM1. . .** | **Auto** | **Em ail Secur ity (DKIM)** |
|  |  |  |  |  |
| **\_dm arc** | **TXT** | **v=DMARC1. . .** | **Auto** | **Em ail Secur ity (DMARC)** |

**Deployment Runbook (Template)**

**Objective: Deploy changes from Staging to Produc tion.**

* **Preparation:**

****

**Wor k from a feature br anch; open Pull Request (PR) to**

****

**Ver ify staging environm ent is synced with produc tion data.**

****

**Run autom ated tests and per for m m anual QA on staging.**

* **Backup:**

****

**Take fresh backups of Produc tion (files + DB).**

****

**Confir m a valid restore point exists.**

* **Deploym ent: Merge PR.**

****

**Deploy via CI/CD pipeline or m anual Git pull. (Avoid FTP uploads).**

* **Post-Deploym ent:**

****

**Run DB m igr ations or configur ation synchroniz ation steps (if any).**

****

**Purge all caches (Plugin, Ser ver-level, CDN).**

* **Ver ification & Logging:**

****

**Smoke-test cr itical user jour neys (checkout, for ms).**

****

**Monitor er ror logs. Roll back imm ediately if cr itical issues ar ise.**

****

**Log changes in the Change Log (below).**

**Change Log (Template)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** | **Environm ent** | **Change Summ ar y** | **By** | **Link (Ticket/PR)** | **Rollback Notes** |
|  |  |  |  |  |  |
| **YYYY-MM-DD** | **Prod** | **[Descr iption]** | **[Nam e]** | **[URL]** | **[Steps taken]** |

**Handover Sign-Off**

****

**Date of Handover : \_\_\_\_\_\_\_\_\_\_**

****

**Par ties Present: \_\_\_\_\_\_\_\_\_\_**

****

**Scope Covered: (e. g. , Full website and infr astruc ture)**

****

**Outstanding Risks/Issues: (e. g. , ACF license needs renewal by X date)**

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**Post-handover Suppor t Agreement:**



**Dur ation: \_\_\_\_\_ Days/Weeks**



**Scope: (e. g. , Cr itical bug fixes only)**



**Rates for additional wor k: $\_\_\_\_\_/hr**

**Signatures:**



**Outgoing Developer/Agency Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**



**New Owner/Incom ing Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**



**Conclusion**

* **successful handover delivers complete control, deep system knowledge, and safe, repeatable oper ations. It is built on three pr inciples:**

**Complete Ownership Tr ansfer, Comprehensive Knowledge Tr ansfer, and Docum ented Oper ational Procedures. The handover is only complete when ownership is fully tr ansfer red, all credentials have been rotated, previous access is revoked, and cr itical oper ational paths (backups,**

**deploym ent) have been tested end-to-end.**

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