

What type of Information to ask for and Why

When the client asks "*why are you asking me for all of this information?*"

We know onboarding can be a crazy time and we ask you a lot of information. I want to go over why we ask you for all of this information and what this information means.

1 What type of site do you have? WordPress, Drupal, Squarespace, static, etc? This lets us know what type of site it is and what information we will need to access it.

2 What is the Site URL? This is to ensure we are working on the correct site

3 What is the Admin Site Login? We need an admin login to your site so we can do work on your site. (For all sites but static sites)

4 Can you provide us with FTP/SFTP access or hosting access? This is so we can access the files on your site. If you can not provide us with file access to your website, we will be unable to do any website work on your site other than add content and media.

5 Is your FTP/SFTP controlled by IP Address? Some accounts are locked so only certain IP Addresses can log into them. If so, we can provide you with a list of our employee IPs.

6 May we have your Hosting Login or can you delegate access to us? This is if we need to talk to the hosting support team on your behalf, need to do any work on your server, or access the database.

7 May we have access to your Domain Registrar? We will need access to your domain registrar if you are migrating your hosting to us, if we are launching a new site for you, or if there is ever issues with your DNS, we can work in it for you.

If you house your DNS in a place other than your registrar like Cloudflare, we will need access to that as well.

8 Is your site using any Premium theme or plugin logins (for WordPress sites) or any 3rd party integrations that we need to know about? If you have any of the logins for your site's theme or plugins that were used, they are useful for the developers when they update your site..

9 Is your WordPress site a multisite? A multisite in WordPress behaves differently than a single site and we will need a "Super Admin" login if the site is a multisite.

10 Does your site have SSL and what type of certificate does it have? When you go to your site, does it have the "https" or "http"? If it does, then you have an SSL. Was it purchased through your hosting or a third party? This information helps our developers to troubleshoot issues.

11 Do you already have Google Analytics setup? If so, please share an admin access to your Google Analytics (and Google Tag Manager) to our preferred email address.

12 Is your site connected to any third party applications? Hubspot, Salesforce, OpenTable, etc. We ask this information for if we need access to any third party integrations so we can troubleshoot issues or change functionality on your behalf.

13 Anything unique or not standard process on your site that our developers need to be aware of? We like to let our developers know if there is anything special or different about a site to ensure we do not compromise the site and you receive the best support we can give.

14 When was the site built and when was the last time any modifications or updates were made? This helps us to know if there is anything that needs to be done immediately to the site. With also how technology changes, it gives us a better idea on how your site was built for our developers to be able to work on it better.