



THE ULTIMATE WORDPRESS SETUP CHECKLIST

Transform your generic, barebones Wordpress template to a clean and professional website!

These are the very basics of getting a Wordpress site up and running without forgetting any of the little details. There are certainly more things you can do to optimize your site in terms of design, SEO, accessibility, user experience, etc – but this checklist is meant as a simple, printable reference tool. You can learn more about all of those other topics via the blog (rachelzampino.com/blog).

**This checklist is assuming you have already set up your domain, hosting, and installed Wordpress – if you haven't, I have more tutorials coming for that, so stay tuned!*

THE ULTIMATE WORDPRESS SETUP CHECKLIST – PT.1

THE BASICS

- ☐ Posts, Pages, Comments | Delete the sample post, page, and comment
- ☐ Appearance > Themes | Delete extra and unnecessary themes
Twenty Nineteen, Twenty Eighteen, and Twenty Seventeen can go (I keep Twenty Twenty as a base to use with Elementor, or just in case I need to troubleshoot anything)
- ☐ Posts > Categories | Add a few relevant categories to use

SETTINGS > GENERAL

- ☐ Update Site Title – this is what shows in your browser tab
- ☐ Get rid of “Just another WordPress site” tagline
This will show in the browser bar next to your site title and favicon, and it will show when you share a link from your site as a social post
- ☐ Double-check your time zone and date/time formats

SETTINGS > WRITING

- ☐ Change default post category – anything other than “Uncategorized”
- ☐ Navigate back to Posts > Categories and delete “Uncategorized”
After you removed it as the default category, it will now allow you to delete “Uncategorized”

SETTINGS > READING

- ☐ Set your Home and Posts pages
- ☐ Make sure “Discourage search engines from indexing this site” is unchecked
Otherwise, people won’t be able to find your site!

SETTINGS > DISCUSSION

- ☐ Uncheck “Allow people to submit comments on new posts”
This means no one will be able to comment on any posts you create from now on – this helps reduce spam and clutter on your posts. But depending on the nature of your site, you may WANT people to be able to have discussions on your posts. You can always change this later, if needed.

THE ULTIMATE WORDPRESS SETUP CHECKLIST – PT.2

SETTINGS > PERMALINKS

- ☐ Set your Permalinks to “Post name”
This helps with both legibility and SEO.

TOP RIGHT > EDIT PROFILE

- ☐ Set up your Profile Picture / Gravatar
This is the image your website visitors will see when you are the author of a post. It is also tied to your email address, so it will work across multiple Wordpress websites!
- ☐ Update “Display name publicly as” to your username, nickname, or full name
- ☐ Update your admin password to prevent hacking
I recommend using the built-in password generator that Wordpress offers – just make sure you write it down somewhere!

APPEARANCE > CUSTOMIZE

- ☐ Site Identity > Set your Logo
This is the logo that will show in your navigation menu + link back to your Home page.
- ☐ Site Identity > Set your Site Icon a.k.a. Favicon
This is the logo/icon that people will see in their browser tab, bookmarks, and on their mobile browser.

APPEARANCE > WIDGETS

- ☐ Delete the default widgets in the Footer + add your own if desired

APPEARANCE > MENUS

- ☐ Name + create your menu
- ☐ Check “Automatically add new top-level pages to this menu”
Any page you create from now on will be added to the menu – you can go back and rearrange or tweak them later if needed.
- ☐ Set the Display Location
This will depend on your theme – usually something like “Main” or “Horizontal” menu.
- ☐ Top Right > Screen Options | Check settings
I usually check ALL of the “Boxes” plus all of the “Show advanced menu properties” for maximum flexibility – especially the “Link Target” so I can set certain links to open in a new window.
- ☐ Make sure to save your menu



Congrats, you made it!

You're officially on your way to a professional Wordpress site. You finished all the tedious tasks, now it's time for the fun stuff – setting up your content and design!