GETTING STARTED WITH ALLBOOKKEEPINGANDTAXES WORDPRESS WEBSITE

@Gaurav (CRM):

As soon as possible, create new “Demo Employee 1”, “Demo Employee 2”, “Demo Employee 3”, “Demo Client 1”, “Demo Client 2”, “Demo Client 3”. I think that the “Project” and Cloud folders can also be named as “Demo Client 1, 2, 3 etc”. Let’s confer to ensure that things run smoothly by giving me a demo when complete.

For website part - @Gaurav, Atul, Sanjana, Tanishka:

As far as possible most of the following tech work should be assigned to Sanjana. If she is unable to do so, then, to Atul. If he is unable to do, then to Gaurav. If no one can handle, then revert back to me.

Once completed, Sanjana should be able to handle all tech parts and Tanishka all marketing parts by themselves. All of her blogs, Tanishka should be able to handle herself. All of the article pages, she can ask Sanjana to upload and remove “Don't Crawl” as needed.

As soon as possible, we need to secure ABT from malice attacks, install plugins for transnational Emails, SEO, Mobile screen compatibility, Web responsive, AI (if possible), Chat (AI just like PNP), Pinging us when our web-site is down, informing when the new version of the WP and plugin are needed etc, Posting Blogs etc and more if possible.

For GOOGLE admin panel we don’t need a GMAIL account, but I prefer GMAIL. Do you which of my email accounts have been used for PNAPNA and other sites so I can give you some thing that has not already been used. I have to give the phone number for ABT as 732 985 2500. The address is VIJAY KUMAR CHOPRA, 3 Leona St., Somerset, NJ 08873

I was able to get some information from the following <https://themeisle.com/blog/things-to-do-after-launching-wordpress-site/> and created a table for us to act upon to get started. I have created a blank row under each task for you to write in your progress. Make sure you sign your comments so I know who is contributing those comments.

This is work in progress. Find more issue and implement them.

This is an add-on work to the first phase for which deadlines must be maintained. Deadline for the following work is Monday Nov 25th 2024 EOD.

Keep entire site under “Don’t crawl”, until we are ready to launch.

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| 1. Delete all default content and Fix site’s basic informationFor Sanjana - Customize site’s title, tagline, time zone, and favicon. It’s very important to have an identity, Google will appreciate that. To do it, go to your WordPress dashboard and then to Settings / General. Use New York time zone and USA English. Site's title, URL, tag line are same “All Book Keeping And Taxes”Also, change your permalink structure. Use something that is friendly and describes the content of each individual page. To change the permalink structure, go to Settings again, and then click on Permalinks. You’ll see acouple of possibilities there. The best option is to use your post names in the |

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| URLs:Start with this blog title “21 Write Offs Allowed by IRS” for now (Tanishka will create this content when ready).WordPress comes with some default content to be used as placeholder items. This includes a blog post titled ‘Hello World,’ a sample comment, and a sample page.Simply go to the Posts » All Posts page. Take your mouse to the ‘Hello World’ post and then click on the ‘Trash’ link.Next, go to Pages » All Pages page and then delete Sample Page. Lastly, visit the Comments page and then delete the default comment. |

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| Set Up a Default CategoryWordPress posts are required to be filed under at least one [category](https://www.wpbeginner.com/glossary/category/). By default, WordPress uses the ‘Uncategorized’ category as the default category.If you don’t change the category when writing a blog post, then it will automatically be filed under the default category.To change the default category, first, you need to visit the Posts » Categories page to create a new category. This will be used as your new default category.After that, go to Settings » Writing page.Here, you will see the default category option. You can go ahead and select the new category you created earlier. |

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| Finally, you can go to the Posts » Categories page and delete the ‘Uncategorized’ category.We need two categories to get started “Bookkeeping” and “Taxes”To learn more, see our guide on how to [change the default Uncategorized](https://www.wpbeginner.com/beginners-guide/rename-the-uncategorized-category/) [category in WordPress](https://www.wpbeginner.com/beginners-guide/rename-the-uncategorized-category/).Change the WordPress Email AddressMost users add their own email addresses when installing WordPress. This means their first user profile and their website’s email address are the same.To change this, you can go to the Settings » General page and enter the new email address you would like to use for the website. |

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| Make sure that the new email address is active, as WordPress will send a [confirmation email](https://www.wpbeginner.com/plugins/how-to-send-confirmation-emails-after-wordpress-form-submission/) to that address.You can use any email address here. However, it would be best to use an email address that shows that this address is for automated emails sent from your website.If you want to use email accounts using your own domain name, then please see our guide on how to [create a free business email address](https://www.wpbeginner.com/beginners-guide/how-to-create-a-free-business-email-address-in-5-minutes-step-by-step/) for your WordPress website. |  |
| **Completed** |
| 2. Create a sitemap.xml fileFor Sanjana/Atul - [Sitemap.xml](https://themeisle.com/blog/xml-sitemap/) is a file that lists all website’s URLs. Google uses this file to understand how your site is organized and what sort of information is there. As a result, it will be easier for Google to index everything. To create a sitemap, all you have to do is install a plugincalled [Google XML Sitemaps](https://wordpress.org/plugins/google-sitemap-generator/). |
| Sir, I will do it today. I have downloaded and activated its plugin. |
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| 1. Change WP Logins

For Atul - The easiest way to break into your WordPress site is to just guess your login and password. As abstract as it sounds, it’s really the case. There are software scripts and bots that go through hundreds of thousands of passwords and try their luck with each one. That is why you need to make sure that your login details are strong enough.Some things to do:* + Create a new user profile for all editing purposes – the role of “Editor.” You can do it in the wp-admin, Users / Add New.
	+ Limit the login attempts allowed before the site is locked down. You can do it with a plugin like [WP Limit Login Attempts](https://wordpress.org/plugins/wp-limit-login-attempts/).
	+ Use only safe passwords.
	+ Store the password data in IWM.
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| Sir, after completing this task of mine, I will try to complete the remaining task of Atul Sir |
| 4. Improve the security of the siteFor Atul - There’s a lot of bad things that can happen to a WordPress site … hacker attacks, malware, viruses, etc. Protecting your website from all that with a firewall of some kind is always a good idea. [Sucuri](https://sucuri.net/) is one of the best WordPress security services. It provides malware detection and cleanup, monitors your site for hacks, mitigates DDoS attacks, and more. For a free solution, check out [Wordfence Security](https://wordpress.org/plugins/wordfence/) or [Solid Security](https://wordpress.org/plugins/better-wp-security/). |
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5. Ensure visibility to search engines

For Sanjana - The no.1 thing you need to do is allow Google to index your WordPress site. Even though in most cases WordPress sets this up correctly on its own during install, checking if things are in order can never hurt. Just go to your wp-admin, then Settings / Reading.

Look for “Search Engine Visibility” and make sure that the checkbox labeled “Discourage search engines from indexing this site” remains unchecked:



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| **Completed** |
| 6. Activate cachingFor Sanjana - Speed is one of the keys to keeping your visitors on the site. In fact, [if a page takes more than 3 seconds to load, 40% of people abandon it](https://blog.kissmetrics.com/loading-time/), according to Kissmetrics. One solution is to install a caching plugin – to reduce the overall page loading times. There are free caching plugins out there, for instance [W3 Total Cache](https://wordpress.org/plugins/w3-total-cache/) or [WP Rocket](https://wp-rocket.me/). Caching is a fairly complicated process, but to simplify it a bit, it’s about fetching the dynamic output of a WordPress site, storing it in the cache, and then serving it to every new visitor from that cache, instead of asking WordPress to generate it anew. Doing it this way takes a lot less time. |
| **Completed** |
| 7. Get a CDNFor Atul - Another recommended step is to hook your site up to a CDN service (Content Delivery Network). A CDN is a solution that takes the content from your site and stores it on a network of servers around the world. Then, when a visitor comes to your site, they get served from the location that’s nearest to them. Hence, they can see your site much quicker than they wouldotherwise. Some of the most popular CDNs include: [KeyCDN](https://www.keycdn.com/), [CloudFlare](https://www.cloudflare.com/), |

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| [Amazon CloudFront](https://aws.amazon.com/cloudfront/). (If you want something free, it’s CloudFlare.) |
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| 8. Set up Google Search Console For Tanishka/Sanjana -To set up the Google Admin console, you can: Go to [admin.google.com](https://admin.google.com/).Enter an administrator account name and password.Launch the Admin console setup wizard.Follow the steps to verify that you own your domain.You can also use a non-Gmail email address to sign in to your Google Account. You can link a non-Gmail email address to your account to: sign in, recover your password, and get notifications.[Google Search Console](https://www.google.com/webmasters/tools/home) (GSC) should be a must-have item on your list. It will help you optimize your site SEO-wise and point you towards some of the issues with the structure of your site that you should address – to make both your visitors and Google happy. More specifically, with GSC, you can learn about things such as: the health of your internal link structure, external links pointing to your site, any sitemap problems, your popular keywords, the indexing status of your site, any crawl stats and errors, security issues, and much more. A true goldmine. |
| Sir, I will do this work tomorrow.( 29 Nov. 2024) |
| 9. Integrate with Google AnalyticsFor Tanishka/Sanjana - [Google Analytics](https://www.google.com/analytics/) is a tracking and marketing tool that every website owner should use. It tracks your audience and their actions on your site. It comes with detailed information about everything related to your site’s content and visitors, such as the most viewed pages, conversion rates, the number of visits per day, in-depth user profiles, bounce rates, and lots of other essential stats.The tool is free and can be easily integrated with your WordPress site through an embed code provided by Google. Alternatively, you can use a plugin like [Google Analytics by MonsterInsights](https://wordpress.org/plugins/google-analytics-for-wordpress/). |
| Sir, I will do this work tomorrow.( 29 Nov. 2024) |
| 10. Install a backup pluginFor Atul - [Backup plugins](https://www.codeinwp.com/blog/vaultpress-vs-blogvault-vs-backupbuddy-vs-codeguard-vs-updraftplus/) will keep your site content in a safe place, in case anything bad ever happens and you need to restore your site to a previously working state. |
| **Sir, I have installed and activated the UpdraftPlus plugin.**This plugin will ensure that the site content is safely backed up. In case anything goes wrong in the future, we can restore the site to its previous working state.For now, backups will be stored locally, but I will set up remote storage (like Google Drive) for added security. |
| 11. Contact Us and the form it on our website :For Sanjana - By default, WordPress does not come with a built-in contact form. But the theme has it builtin. Make sure that these two utilities are functioning properly |
| **Sir, I have used Contact Form 7 with the Flamingo plugin.**The built-in contact form works perfectly and stores all submissions in the WordPress dashboard via Flamingo |
| 12. Set Up WordPress SEO:For Sanjana - Use the [All in One SEO](https://aioseo.com/) plugin. It is the mostcomprehensive [WordPress SEO plugin](https://www.wpbeginner.com/showcase/9-best-wordpress-seo-plugins-and-tools-that-you-should-use/) on the market, and it takes care of all |

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| the important SEO settings out of the box.For complete step-by-step instructions, see our ultimate [WordPress SEO](https://www.wpbeginner.com/wordpress-seo/) [guide](https://www.wpbeginner.com/wordpress-seo/) for beginners. |
| Sir, I have downloaded this plugin and also made its settings but I have to check it once with Atul Sir. |
| 13. Setup Spam Protection only if we are setting up comments :Spam comments can be quite problematic. Most of them contain links to malicious websites known for distributing malware. Spam comments can affect your search rankings and your website’s reputation.You can enable [comment moderation in WordPress](https://www.wpbeginner.com/beginners-guide/beginners-guide-on-how-to-moderate-comments-in-wordpress/) to prevent any comment from appearing without approval. However, as the quantity of spam grows, you will be spending considerable time moderating comments.To fix this, you need to install and activate the [Akismet](https://wordpress.org/plugins/akismet/) plugin. It is a |

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| WordPress anti-spam plugin and one of the only two plugins that come pre-installed on every WordPress website.To learn more, see our guide on [how to set up the Akismet anti-spam plugin](https://www.wpbeginner.com/beginners-guide/akismet-101-guide-for-all-wordpress-users/) in WordPress. |
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| 14. More work to do/ Install Plugins:For Sanjana/Atul - Add plugin for transaction Email, Chat box, Ensure that [all plugins are safe and optimized](https://themeisle.com/blog/remove-slow-wordpress-plugins/).Atul: Look at <https://www.techradar.com/best/best-wordpress-plugins> (there may be more resources where you can similar info) and make a list and let’s consult how many of these free plugins are needed. Send the list to me,Gaurav and Sanjana. They do have transaction email plugin. |
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| The chatbot setup for the All Bookkeeping And Taxes project has been successfully completed using CXGenie. |
| 15. Terms and Conditions, Privacy Policy And Agreements.For Sanjana/Atul - I shall provide the content to be copy/pasted when you are finally ready to launch. |
| Sir, once I get this content, I will complete it. |
| 16. INTUIT “Beat my price” CTA to be copied. Following is added on Nov 22nd 2024Go to this URL and see[https://turbotax.intuit.com/tax-tips/tax-pro/7-most-common-tax-questions-an](https://turbotax.intuit.com/tax-tips/tax-pro/7-most-common-tax-questions-answered-by-a-cpa/L4Z70RBd8) [swered-by-a-cpa/L4Z70RBd8](https://turbotax.intuit.com/tax-tips/tax-pro/7-most-common-tax-questions-answered-by-a-cpa/L4Z70RBd8)At the bottom there is a popup seen like this: |

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| It states “Limited Time Offer”. I need this pop up and the page there after. This CTA “Beat my price” leads to <https://turbotax.intuit.com/lp/byp/1495/>I want this entire downloaded and re-coded for us “keep it under Do not crawl”, including the footer for articles.Is this clear? |
| **Completed** |