Agent Image

Launching an AIOS Wordpress Website

Training Objectives/Goals

At the end of this session, you will learn how to take sites live and then pass them to the QA team for "Soft Launch." Once the QA process is complete, the site is considered "Full Launched."

Launch Best Practices

- **Don't launch on a Friday or a day before a major holiday**. We won't have coverage for emergencies.
- **Domain Name:** Clients often have multiple domain names. You must verify the primary domain name to use and whether any others need to be pointed to the main website.
    - If a client decides to change their primary domain, promptly notify the IDX team and verify if any paperwork needs to be resent.
- **Client's domain registrar** (where they bought their domain name)
    - If you don't know, perform a WHOIS on http://dnsyard.com. Check this out if you need assistance on how to use this.
- **Client's domain registrar logins: When a client provides you with the login credentials, do not assume they are accurate. Make sure you try to log in right away. Most domain registrars also have 2-step verification, so you'll need to do this ahead of time to avoid launch delays.**
    - There will be times when the verification code won't push through. It's best to have the client on the line while you attempt to log in to their domain registry.
    - If your client is with GoDaddy, it is highly recommended that you do a Delegate Access request instead. Check out how.
- **Site SSL: Effective June 1, 2023, all our sites will have SSL through Cloudflare** (no need to upsell as this is part of hosting/maintenance. Read me)

- **Does the client have emails with this domain?** Ask the client if there's any email attached to the domain name. If so, we'll need the MX records in writing. See more details below. Do this ahead of time. Like days or weeks ahead of time. Even better if we client can export their DNS records. Know more here.
- **Site Propagation:** Remind clients that site propagation may take 24-72 hours
  - **Set client expectations:** Inform the client not to schedule a marketing campaign on the day of launch or shortly after. This way, we'd have enough time to address any website issues/kinks.
- **Planning to go on vacation?:** Por favor! Do not schedule a site launch a day prior to your scheduled leave. If unavoidable, make sure to flag your managers*. Also, in the event that you call in sick a day after launching a site, please inform your managers so we can be on the lookout for any urgent issues post launch.*

Before launching a website (Plan Ahead)

Yay! Ready to launch a site? You must complete ALL 8 items below:

1. **Pre Launch QA.** Once a client's website is near launch (waiting on client approval, waiting on registrar login, waiting on final items/review from client etc.), set the Project Phase to *Pre-Launch QA (Quick)*. Once triggered, our QA Team will check the most basic items usually missed by client facers when launching sites. Once QA completes this - they will set the project phase to **Pre launch Done.**

   This process usually takes about 1-2 business days so plan in advance.

   a. Prerequisites for Pre-launch QA:
      i. There should be no Blank community pages (and pages found in main navigation)
      ii. There should be no Placeholder text (eg. www.*-pending.com and lorem ipsum)
      iii. There should be no Dead Links (Button , Social Media etc).
      iv. All sections that require programming on the home page are programmed and working properly. All Social Links Active + Social Media feed connected.
      v. Ensure that the Meta Title and Meta Description are added on the Project level in Salesforce.

b. QA will put the project back to the Site Population phase after 2 consecutive days of following up.

2. **Domain Registrar and DNS Records**

   So you already have the client's domain registrar login, great! Does it work? Does it have 2FA? Are you able to access/manage the DNS records section? Is the client using custom nameservers? Does the client have emails attached to the domain name? Are there subdomains attached to the domain name? If so, you'll need to ask the client for records (especially the MX records!) to ensure a smooth and timely launch. Unsure on how to go about this? Ask your managers or SRE. Or read me.

3. **Site Crawl + 301 Redirects.** If a client has an existing website, it is **imperative** that we create a task to CID for them to crawl the site and prepare the 301 redirect files.

   Ideally, you'd want this 5-7 days prior to launching.

   Naming Convention: CID - Site Crawl for 301 Redirects

   Sample tasks:

   https://na97.salesforce.com/a1L2H000005XSyW

   https://na97.salesforce.com/a1L2H000005XSbN

   Notes:

   -You will need to create another task for the 301 redirect file upload once the site is up and running. See more info in the succeeding pages.

   -CID is going to crawl the site for its metadata as well as prepare the 301 redirect files. This step doesn't include manual migration of SEO content unless the client paid for it.

4. **Client's written approval to launch.** Ensure this is logged in Salesforce. Subject: LAUNCH APPROVAL FROM CLIENT then copy paste the launch approval email.

   Scenario: Verbal Approval is no bueno!

If the client verbally gives you the go signal to launch, politely tell them you'll send them a launch approval email that they **must** acknowledge. This is for compliance purposes. **Use the template:** Launch Approval

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5. **The client is fully paid.** However, your Salesforce license doesn't include access to view opportunities. Therefore, you'll need to check with your manager to ensure the client has no outstanding balance. If there is, we'll need to charge before going live.

   Scenario: Client has outstanding balance

   Upon confirming with your manager that there's indeed a final balance, send the template: **Launch approval with balance due**. Once we receive the client's approval to launch and to charge final balance, send an email to Billing. Use template: Charge Final Balance. Do NOT launch the site until Billing gets back to you with a Charge Approved notification.

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6. **Google Analytics + Google Search Console**

   Client has an existing live site: If your client has an existing site, ask for their Google Analytics or Google Tag Manager. This way, historical data will be carried over to the new site. Ask the client to add our email address: analytics5@agentimage.com so we could track their site traffic.

   Furthermore, ask if the client has Google Search Console set up. If so, ask to be added to the account as editor so we can resubmit the new sitemap post launch.

   Client has no existing website: No worries, we'll set analytics for them.

7. **Email Address to use for leads received from the website.** Ask your client what email/s they want the website leads to go to. This may be different from the email where they want their clients/prospects to contact them. Forwarding to multiple emails is okay. Using different emails for different contact forms is also okay.

Scenario: Leads to forward to a 3rd party

Sometimes, clients would also ask if you could route the leads to a 3rd party CRM such as: Mailchimp/Constant Contact/Follow up Boss etc. In this case, we'll need the following: **Mailchimp/Constant Contact:** Login credentials. **Follow Up Boss: Their unique** follow up boss email (example: name@followupboss.me. Read more).

Scenario: Leads to forward to a 3rd party other than Mailchimp/Constant Contact/Follow Up Boss (adding of unique FUB email only)

There's a lot of 3rd party CRM such as SendGrid, Top Producer etc. We'll have to ask for a Basecamp quote as needed.

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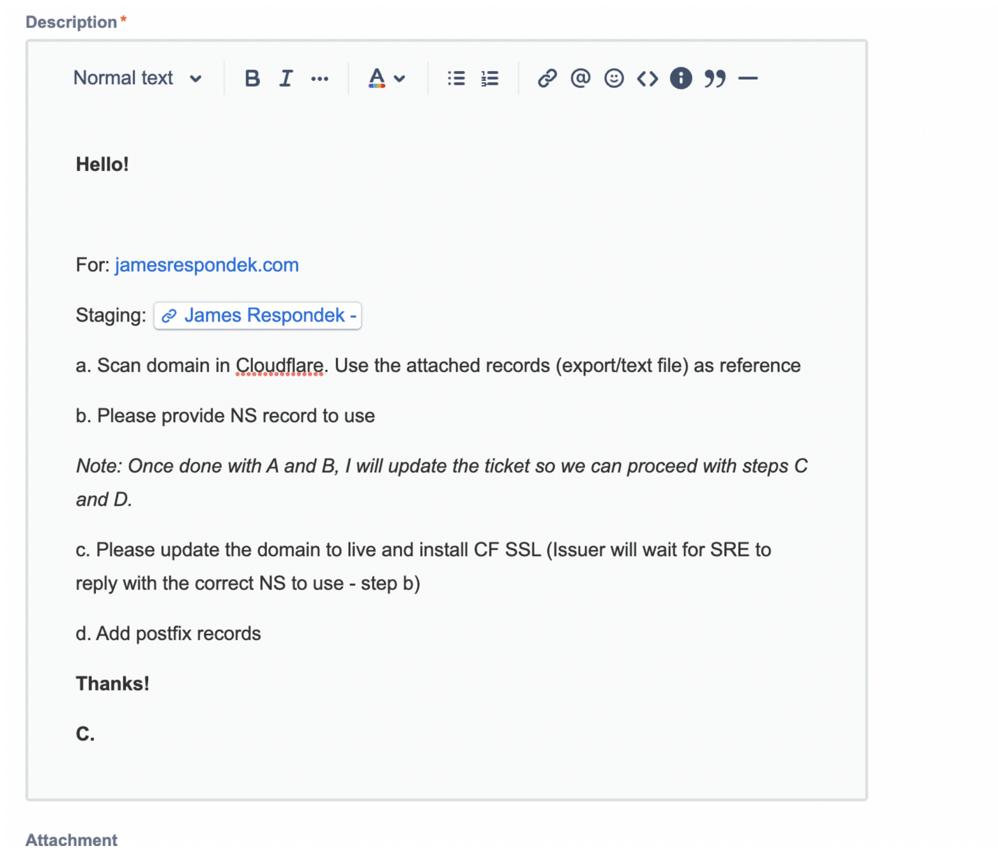
8. **Add to Vhost + Cloudflare + Scan Records.**
   In order for our servers to recognize a live site, it needs to be added to Vhost.

   What to do: Create a ticket to SRE via Jira.

   Subject Line: Add to Vhost, Cloudflare + Scan Records (domainname.com)

   Description: Must add staging site and the domain name to use.

   If with a secondary domain/s, add as well.


Description*

Normal text

Hello!

For: jamesrespondek.com

Staging: James Respondek -

a. Scan domain in Cloudflare. Use the attached records (export/text file) as reference

b. Please provide NS record to use

Note: Once done with A and B, I will update the ticket so we can proceed with steps C and D.

c. Please update the domain to live and install CF SSL (Issuer will wait for SRE to reply with the correct NS to use - step b)

d. Add postfix records

Thanks!

C.

Attachment

Why is this step needed: Whether or not the client has a live site, we need to make sure the domain name is added to Vhost. In addition, SRE needs to scan existing DNS records prior to launch to ensure everything will go smoothly.

Important: Before sending out a ticket, make sure an export file of the DNS is available.

If your client is with Go Daddy, you need to export existing files. See: https://ph.godaddy.com/help/export-my-domains-zone-file-records-4166.

For other DNS providers without export features, copy and paste the records to a text file then attach the export/text file to your ticket. Alternatively, you can also export the DNS records on https://dnschecker.org/all-dns-records-of-domain.php (Add the domain > Select Lookup DNS > Click Download records > Click Download in Text Form)

The Day You Change the DNS

Step 1: DNS Change

- **The Cardinal Rule:** You **must** copy the original domain records first prior to updating anything. To do this, go to dnsyard.com and do a domain name lookup. Copy all the values on Salesforce (as a note on the Project level) and make sure to save your file. This way, if something goes wrong, you could easily put back the original setting.

- **Log into the domain registrar and change the A record and add CName.** Hang on to any IP addresses already in the domain registrar (add screenshot in SF domain in case something goes wrong).

  Go Daddy
  Network Solutions
  Other Registrars: Google is your best friend or ask your manager.

- **The A record to use must match the server where the staging link is.** You may check the A record to use by going to Salesforce>Domain Level: https://prnt.sc/wbduvb. **Again**, make sure you are using the correct A record as we have multiple servers.

- **Add the NEW Postfix Records (New records as of Feb 15, 2024)**

  CNAME
  Value: **www**
  Points To: **domainname.com**

  MX Records
  Name: **noreply.domainname.com**
  Value: **mail.protection.aios-notifications.com**

Priority: **10**

TXT Records

Name: **noreply.domainname.com**

Value: **v=spf1 mx include:spf.mail.protection.aios-notifications.com -all**

TXT Records

Name: **selector99._domainkey.noreply.domainname.com**

Value

v=DKIM1;k=rsa;p=MIIBIjANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEAwszJwfm+kL2dTJSVDwGvMxEnvzjoZ4vVVO2PhJkfy1TZ5x5UBF7nvabYrOIM3R1XIaYnNuz75STHiqK1yqKXcjO1SPpR/09CIJsqUYSZ+0C+5HN21hJp+o2NnSo6yh/vfSUtbCkaOxVvafeGSq5Z02lmm8QCP/Ip9k3wrkNIXERo/Tvn+5ev8nEbuYrZd/svGrayUYiJyvUDumX0cJQJhaCH0Kt/YVyaLOU77xf04uF/ApQ9BoYcE+KqCdQz5zI+gkrQXapHgkMootnhLYLlw2r63oc9Jr0OktUv2QXb+rtZKWsjE4ghlY8riIRg2U7jX1p0YpC40LpnnMFmPpoq1wIDAQAB

TXT Records

Name: **_dmarc.noreply.domainname.com**

Value: **v=DMARC1; p=reject; rua=mailto:webmaster@ap.aios-staging.com**

Why are we doing this?: Nowadays, there's always the 2 Factor Authentication prompt when you log in to a domain registry. To avoid delays, please take time to add this instead of asking our SRE Team to do so.

- **Nameservers:** If you're updating the nameservers instead of doing an A record change, make sure you completed Step #8 in Before launching a website (Plan Ahead)

  Reiterating - Nameserver records MUST NOT be changed without prior SRE instructions.

Why do we need to ask what CloudFlare nameservers to use? Once we request SRE to add the domain name to vhost, they will scan the existing records of that domain and will provide us the nameservers (based on what Cloudflare assigns. It's no longer always neil/ashley for non vips or roxy/vicente for VIPs.)

Pro Tips!

You MUST do the SRE ticket (add to vhost) and ask for the nameservers prior to switching the records in the client's domain registry. It is because Cloudflare is the one assigning nameservers and it's not always our usual neil/ashley combo.

~~**Need info about SSL?** Read our process here: https://docs.google.com/document/d/1W7NFJUFJytwQGytxqH6CQamxPSuG30np/edit~~

When updating nameservers, you **MUST** have a backup of ALL the client's DNS settings ie. A, MX, TXT, CNames, etc. prior to switching records.

~~**So you've decided to throw in that free SSL certificate:** Create a JIRA ticket for this.~~

This is a good read: Understanding A Records, CName, MX Records:
https://www.elegantthemes.com/blog/wordpress/what-is-an-a-record-and-how-is-it-different-from-cname-and-mx

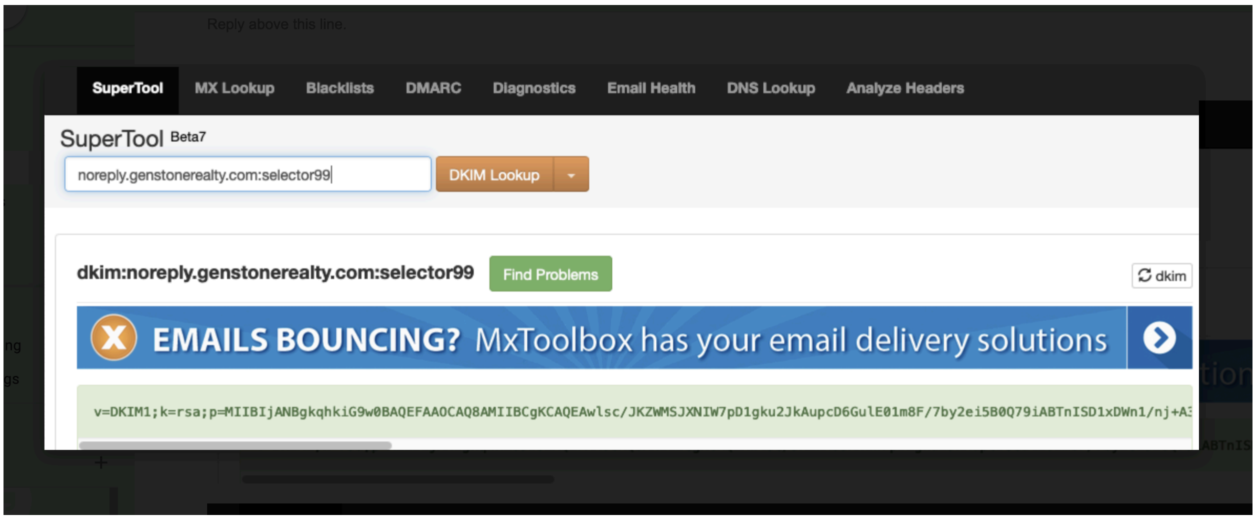
Step 1: SRE Go Live Task

- **After updating the nameservers, now it is time to update your SRE Go Live task, yay!**

  This step is crucial as all staging links will be replaced with the actual domain name. Mark as high priority.

NOTE: Once you add a comment to the task, feel free to slack #sre channel to expedite your request.

FYI: You will be getting a notification once this request is complete. SRE will also be providing you a noreply.domainname.com and a screenshot like the one below:



PRO TIP! If your project is a Redesign (ie. Current Agent Image client who has a live website with us) Include in your task for SRE to provide you a staging link and backend access to the old site. This way, if there's anything that needs to be backtracked, you have an easy reference.

Step 2: Wordpress Updates

- Login to the staging Wordpress back-end.
- Go to **Settings> Reading**
  - On "Search Engine Visibility" **un-check**: Discourage search engines from indexing this site
- Go to **Appearance> Menus**
  - Check each "Custom" link: http://prntscr.com/71wv1b
  - Custom links are the most likely to have the staging url in them.
  - Correct and Save.

- Go to the **Homepage**, click/hover on everything. Navigation. Everything. Update any broken, hard-coded links in **Appearance> Widgets.** Task anything you can't figure out (**FEWD**). Upon creating the task, ask your manager to put it on high priority.

- Go to **an inner page**, click/hover on everything. Navigation, sidebar. Update any broken, hard-coded links in **Appearance> Widgets.** Task anything you can't figure out (**FEWD**). Upon creating the task, ask your manager to put it on high priority.

- Go to **Contact**
  - Check each contact form created: http://prntscr.com/71yc4h
  - Update the email address on the To: http://prntscr.com/71ycqc
    - To: **client's email**
    - Remove the staging url from the footer of auto-generated email http://prntscr.com/71ycqc
  - Send a test email on each form created and ask the client if they received it.

- **Go to an IDX page.** Click on all the navigation, any sidebars. Does it have pagination? Task anything you can't figure out (**WAD**).

Step 3: Once #2 is complete, create a WAD Task:

- **WAD - Set up SMTP / Contact Forms task**

  Subject: WAD: Contact Forms (Live)
  Instructions:
  - Please set up SMTP for this site. Already added the CNames in client's domain + SRE already created Postfix.
  - Make sure all contact forms (CF7 and IDX forms) will be sent to the following emails: [client email here]
  - Please make a copy of this form https://docs.google.com/spreadsheets/d/1lhHNjQR1LYrs1Uefn5OqKFQskoJgPbndG8B6SshFHWE/edit#gid=0 and list down all Contact Form 7 forms.

  - Send at least one test submission to the client. Use the following form values. Client facer must confirm that the client receives it.
  - First Name: Agent Image Test
  - Last Name: Agent Image Test
  - Phone Number: 1.800.979.5799
  - Email: <Please replace with your email address> + PM's Email
- Make sure all emails are going into the Inbox, not into Spam and Junk.
- Form subjects are all updated. Please do a test and provide screenshots.
- Please have the Email Template form correspondence updated (logo, phone, and email) - please use the logo on the header.

Note: If the client insists on installing the recaptcha v3, please let them know that the page score of the website might be affected.

- Ask your manager to set this task on high prio.
  Why do we need to do this: Upon site launch, clients are usually eager to test their websites, especially the contact forms. And when they do not get a notification of their test, they tend to panic. Thus the need to do this step proactively.

Step 4: IDX

- If the IDX is iHomefinder/IDX Broker, send an email to **idxstudio@agentimage.com** and **nicole.s@agentimage.com** for **Nicole Santos** to remove the Pending Account and add to Billing. Make sure to include the link to the SF account/project for IDX.
- You may also ask Cherry to remove the IHF pending account status.

Step 5: Create a 301 Redirect File Upload

- Remember that **CID - Site Crawl for 301 Redirects** task pre-launch? Now that the site is live, you'll need to create another task for CID to upload the 301 redirect file.

  Sample tasks:

  https://agentimage.my.salesforce.com/a1L2H000005XSyW
  https://agentimage.my.salesforce.com/a1L2H000005X2fY

Step 6: Create a WP log in account for the client

- Wordpress Dashboard>Users.
  Username: use client's name

Password: should be auto generated. Click Show Password to copy the values.
Uncheck User Notification https://prnt.sc/wbd829
Role: Administrator

- Go to Salesforce>Domain Level
  Add client's username and password

Step 7: Create a QA Task: Google Analytics (as of March 12, 2021)

- **Why are we doing this?** When a site goes live, clients tend to be excited to do their marketing eblast etc and would most likely ask for their site traffic. QA Team usually sets up the Analytics part towards the tail end of their process and this is fine in a normal scenario. However, due to an influx of projects for QA, our turnaround time is longer than expected. As such, do create a task for our QA Team to set up Google Analytics for the newly launched site.
- Sample task: https://agentimage.my.salesforce.com/a1L2H000005Xmqh
- You may also include the client's email address (must be Gmail/Workspace based) to the analytics or you may add at a later date.

After the Site is Live

Email client

- Assuming the launch went well, your next step is to Inform the client that the site is already live! Yay! Use the template in Salesforce (note that there's 2 template options, with SEO and without SEO, please select accordingly).

Email the SEO PM

- Inform the SEO PM that the site is live. Make sure it is logged in Salesforce.

Site Walkthrough

- Schedule a site walkthrough.

- If they have iHomefinder/IDX Broker, you'll need to show them the IDX Control Panel.

- Prior to your scheduled meeting, make sure to send an email to the client re: where to log in, credentials etc. There's a template in Salesforce for this.

- **Document in the Salesforce project.** Log your walkthrough call with the client in Salesforce. If it's not in Salesforce, it didn't happen. If this happened through Google Meet or Zoom, indicate as well.

Pro Tip: It is recommended to have the walkthrough *after* the Post Launch QA Process to ensure there's no overlapping of work/edits. You may also schedule the tutorial prior to QA but you must inform the client to refrain from doing edits once the Post Launch QA Process starts.

Good to Know: Providing the client a site walkthrough is no longer mandatory. However, should a client request for one post launch (even if the account has been transitioned to Support for many months or years!), you will be required to handle the site walkthrough.

Salesforce Update

- Update the Salesforce Domain level with the following required information:
  - if the domain name is _**new**, change it to the correct domain: https://snipboard.io/juOdk6.jpg
  - Update the Website Status to **Live On Our Server**: http://prntscr.com/8teyfw
    - If you are using the same domain, go back to the old domain project and set the previous domain name to status: Inactive/Legacy: https://snipboard.io/vdfhGJ.jpg
  - Add domain registrar logins: http://prntscr.com/8tezln
    - If the client did not provide their domain credentials, enable the checkbox: Client Did Not Provide.
  - If you have extra domain logins, add via note: http://prntscr.com/8tf0l6
  - Scrub the entire record to make sure it's all updated. If the client changed their domain or had the pending.com domain, update now.
  - Site Manager information will need to be completed
    - Admin Username
    - Admin Password
    - Client Username
    - Client Password
      - You can update this on the domain level
  - You will also need to update the Brokerage, Hosting Server, and Template fields on the domain level

- One more time. You must add the domain registrar logins to the domain. This is for QA. If you didn't do it before, then you need to do it now. This is needed for the SMTP settings/DNS future updates.

  Any attempt to send the site to QA-Soft Launch without completing all of the above required fields will result in an error, preventing you from changing the Project Phase field.

Sending to QA - Soft Launch

If the site is ready for QA, mark the Salesforce Project **SOFT LAUNCH** (sometimes you will go live well before the site is fully finished - in those cases keep the project in SIte Population until it's ready for QA).

QA team's tasks will automatically populate in SF.

However, there are things that have to be done before QA assigns the task:

Add Post Launch Notes

1. **Client's launch approval should be logged on Project Level:**
   a. Done
   b. Not done: [cite valid reason here]
2. **Meta titles and meta description on Project Level:**
   a. Done
   b. Not done: [cite valid reason here]
3. **Product / Service should be updated:**
   a. Done
   b. Not done: [cite valid reason here]
4. **The site is hosted on our servers:**
   a. Yes
   b. No: [cite valid reason here]
5. **Web status should be "Live On Our Server":**
   a. Done

b. Not done: [cite valid reason here]

6. **Add client's WP backend login on Project Level:**
    a. Done
    b. Not done: [cite valid reason here]
7. **If the site uses IDX Broker or IHF, login should be available on Project Level:**
    a. Site doesn't use IDXB/IHF
    b. Done
    c. Not done: [cite valid reason here]
8. **Registrar login should be available on Domain Level:**
    a. Done
    b. Not done: [cite valid reason here]
9. **Hosting Service should be activated on Account Level**
    a. Done
    b. Not done: [cite valid reason here]
10. **All tasks except QA tasks must be completed:**
    a. Done
    b. Not done: [cite valid reason here]
11. **Social media links work (not dead links/AI SMIs):**
    a. Yes
    b. Yes, with exceptions: [cite valid reason here]
    c. No: [cite valid reason here]
12. **Email address to be used for contact forms:** [email address]
13. **The site is working with or without a www prefix:** Yes
14. **Sent email to Remove Pending to IDX Team:**
    a. Site doesn't use IHF
    b. Done
    c. Not done: [cite valid reason here]

15. **Notes for QA:** [provide additional notes/requests] Also, add all the custom pages done for the client. Make sure you add the corresponding links of the pages and not just the page titles.

Add Metadata:

- Here is an example of what we need to do with the **Metadata Task** section, found on the project level - http://prntscr.com/cvjdr1

  Meta Title - Is the description that a user will see when they look for the website on google. Add info about the website.

  Swap out the placeholder communities with the client's actual communities (limit 3). [Realtor Name] - [Community 1] Real Estate, [Community 2] Homes, [Community 3] Investment Property

  Example: Jane Doe - El Segundo Real Estate, Beverly Hills Homes, Malibu Investment Property
  Note: The above are just suggestions. Of course, if your client is specializing in Ranch Properties then you'll need to adjust accordingly.

  Meta Description - copy the first sentence of the welcome intro or bio (minus the Welcome to my site line, of course).

  Here's a good read: https://moz.com/learn/seo/meta-description

Example : https://na97.salesforce.com/a003400000SdkYc?srPos=0&srKp=a00

- If the client has an existing site, this information is on the csv file that CID attached to your **Site Crawl for 301 Redirects** task . Just go to your previous task and copy from there.
- A client may also use their own meta title and description.
- Even if the client has an SEO project, you'll still need to add the basic metadata. Clickality will just overwrite this once they start their SEO project.

QA Completed - Turnover to Support

- Once the QA process is complete, the account is going to be transitioned to our Web Support Department, who will then handle any future changes/requests from the client.

- To officially turn over a client to our Web Support Team, send the Post Launch Email template (note that there are 2 templates, with SEO and without SEO. Choose accordingly).

- **Good to Know:** Providing the client a site walkthrough is no longer mandatory. However, should a client request for one post launch (even if the account has been transitioned to Support for many months or years!), you will be required to handle the site walkthrough.

- **Good to Know:** If you have any outstanding items/deliverables, ie. you informed the client that you will personally assist them in updating this or that page etc., then you must complete those prior to project turnover. You do not want to be that project manager who transitions projects with lots of website issues. You'd be flagged and be asked to take the project back if and when this happens.

Related Topic: **SSL Process**