

# Download a PDF of this process now!

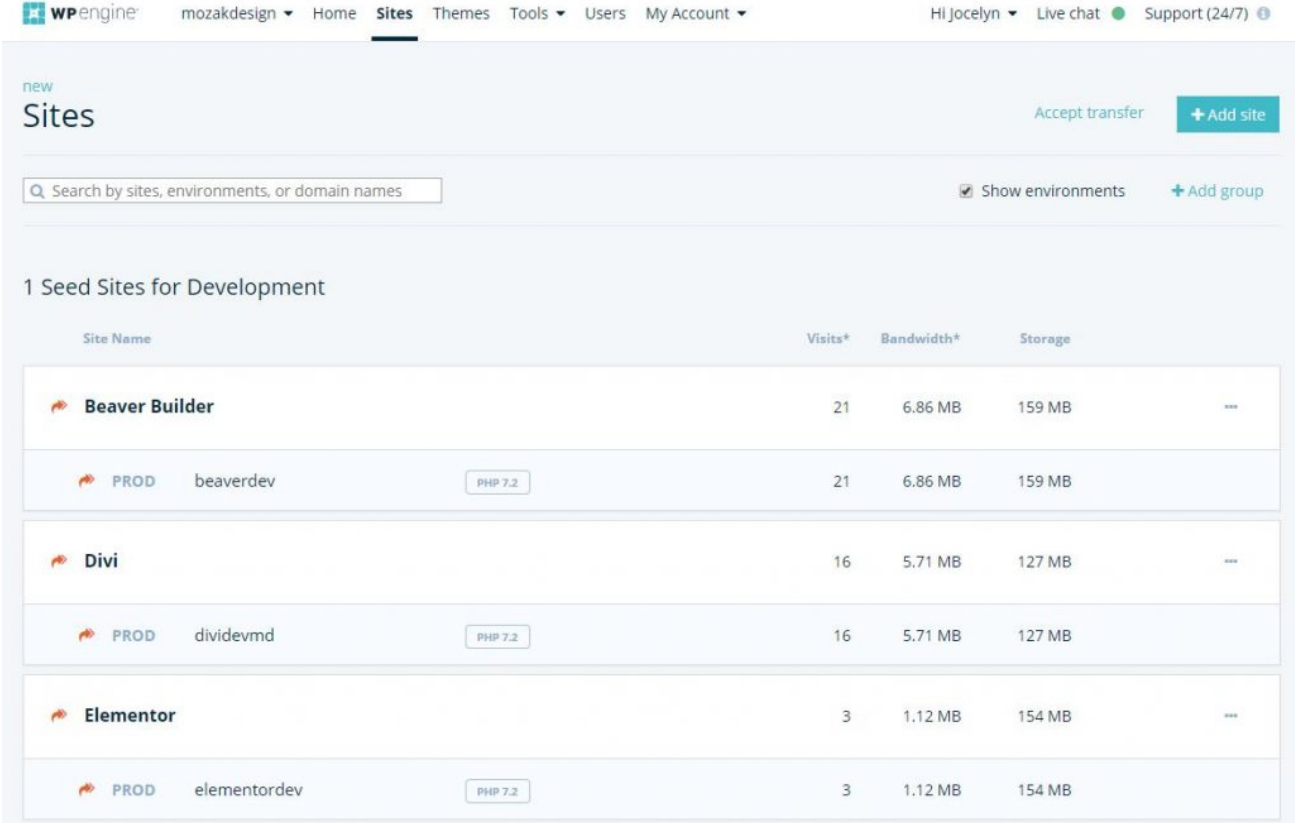
This post on creating a development site on [WP Engine](#) in 3 Easy Steps is a just one of MANY business automation and systemization tips I gave in my WordCamp talk entitled: [Clone Yourself Though Automation](#).

Note: Full unedited transcript at bottom of this post.

[3 Easy Steps with WP Engine](#) sure beats doing a manual install of WordPress, Themes & Plugins each and every time I have a new client build! [Click To Tweet](#)

## Step 1: Log into your WP Engine Account

Log into <https://my.wpengine.com> with your account credentials. This will bring you directly to the dashboard.



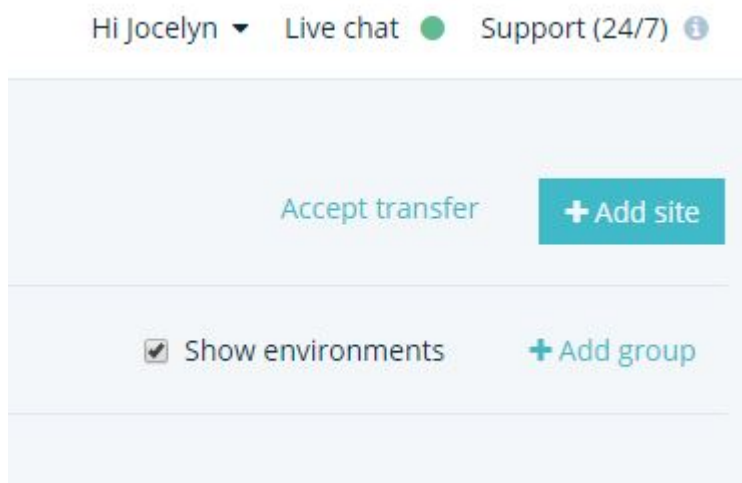
The screenshot shows the WP Engine dashboard with the 'Sites' tab selected. The dashboard includes a search bar, a 'Show environments' checkbox, and a '+ Add group' button. Below the search bar, there is a section titled '1 Seed Sites for Development' which contains a table of sites. The table has columns for Site Name, Visits\*, Bandwidth\*, and Storage. Each site entry includes a theme name (Beaver Builder, Divi, or Elementor), a 'PROD' label, a development environment name (e.g., beaverdev, dividevmd, elementordev), and a 'PHP 7.2' button. The table also shows the number of visits, bandwidth, and storage for each site.

Site Name	Visits*	Bandwidth*	Storage
<b>Beaver Builder</b>	21	6.86 MB	159 MB
PROD beaverdev <span>PHP 7.2</span>	21	6.86 MB	159 MB
<b>Divi</b>	16	5.71 MB	127 MB
PROD dividevmd <span>PHP 7.2</span>	16	5.71 MB	127 MB
<b>Elementor</b>	3	1.12 MB	154 MB
PROD elementordev <span>PHP 7.2</span>	3	1.12 MB	154 MB

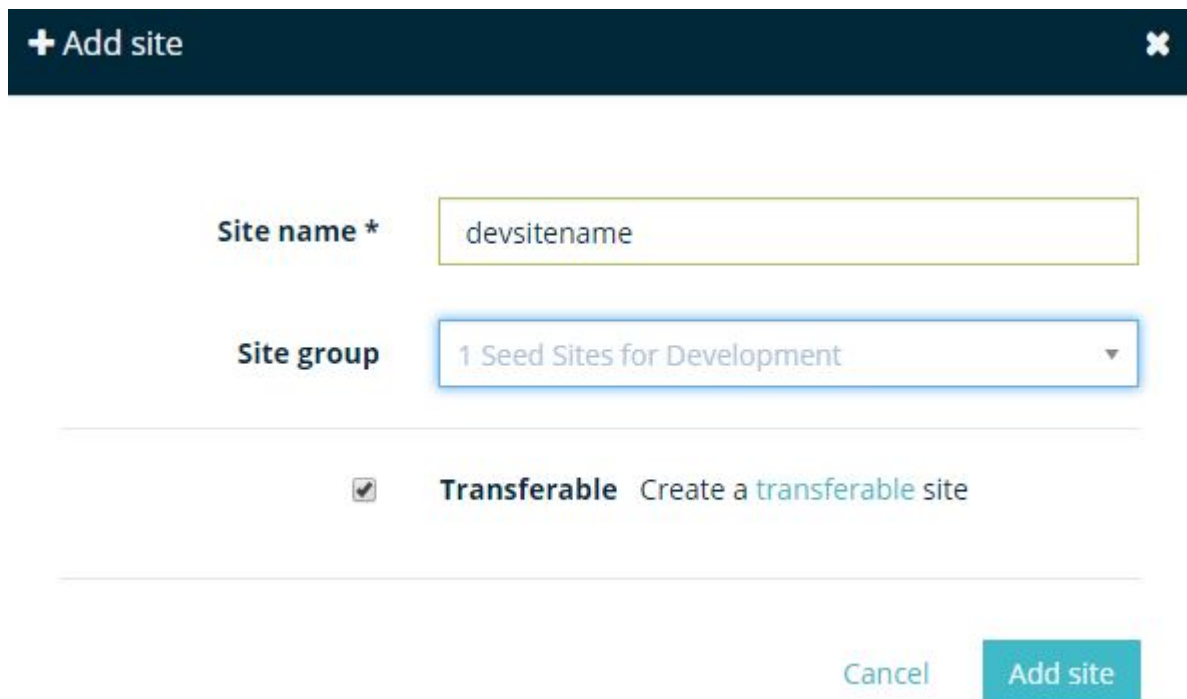
## Step 2: Clone your Seed Site

Once you have your Seed Site configured with your business go to Themes & Plugins you can use this Seed Install as the base of all future WordPress development projects.

**1. Click on the teal " + Add Site " button in the upper left corner of your WP Engine dashboard.**



**2. Name your Development Site and check the "Transferable" box.**

A screenshot of the 'Add site' form in WP Engine. The form is contained within a dark blue header bar with a white '+ Add site' button and a close 'x' icon. The form fields include: 'Site name \*' with a text input containing 'devsitename'; 'Site group' with a dropdown menu showing '1 Seed Sites for Development'; a checked checkbox for 'Transferable' with the text 'Create a transferable site'; and at the bottom, 'Cancel' and 'Add site' buttons.

**3. Click on the “Copy from existing” tab and select the Seed Environment you want to use for this project and name your Development Site.**

**Add a Production Environment**

Use a production environment as the live version of your site. By using a production environment, you can ensure that the changes made in development and staging are accounted for.

Create new      Copy from existing      Move existing

Copy an existing environment from another site. The environment you copy will not be altered.

**Name the environment**

devsitename .wpengine.com

The environment name cannot be changed after creation.

- ✓ Begins with a letter
- ✓ Only letters and numbers
- ✓ Between 3 and 14 characters
- ✓ Name is available

**Select an environment to copy from**

Select an environment

Beaver Builder

beaverdev - PROD

Create environment

Create environment

**4. Click the “Create environment” button.**

**5. Wait for WP Engine to spin up the new WordPress Development area for you!**

### Step 3: Set Development Passwords

With the Development Site all setup we have just a few passwords to set and you'll be on your way.

**1. Set the sitewide development password to prevent Google and the client from seeing the website until you are ready.**

Simply click on the pencil icon by the “password”. For simplicity I like to use the development site name.

newmdclient ↓ Copy from ↑ Copy to

## Overview

🔒 Blocked traffic: Production & Staging

➡ Transferable environment (Restricted) Transfer this environment

Traffic to this site is restricted. To unlock it, transfer it to another account or convert it to a standard environment on your account. [Learn more](#)

**Demo link:** [newmdclient.wpengine.com](https://newmdclient.wpengine.com) **User:** demo **Password:** newmdclient [✎](#)

## 2. Setup SFTP access just in case you need it.

First, click on the teal " + Add SFTP user " button in the upper left. Then create the user name and password.

newmdclient ↓ Copy from ↑ Copy to

## SFTP users

**SFTP Address:** newmdclient.sftp.wpengine.com All | [Production](#) | [Legacy Staging](#) ⓘ + Add SFTP user

**Port Number:** 2222

Username	Path	Environment
There are no SFTP users for this environment.		
<a href="#">Learn more about SFTP</a>		

## ⚙️ Add new SFTP user to newmdclient

Enter the user information below. You can share this login information with anyone who needs SFTP access to your install. You will need to create separate SFTP access logins for each install of WordPress on your account.

Username \*

Password \*

Show password

Path (optional)

Environment \*

Cancel

Add SFTP user

SFTP Address: newmdclient.sftp.wpengine.com  
Port Number: 2222

All | [Production](#) | [Legacy Staging](#) ⓘ

+ Add SFTP user

Username	Path	Environment	
<a href="#">newmdclient-mozakdesign</a>		Production	<a href="#">Delete</a>

**3. Login into your WordPress Development site and update your administrator password to a new unique one for security.**

**4. Document your passwords.**

It's critical the team knows where to find these logins and any relevant information for each project. I

recommend creating a per-project master client file document passwords and other pertinent client details. Below is my template.

### Client Development Logins Template

Dev Site URL:	WP User:	SFTP Address:
User: demo	WP PW:	Port Number: 2222
PW:		User:
		PW:



### Celebrate!

I don't know about you but for me that sure beats doing a WordPress install when I manually install the Themes & Plugins each and every time.

Not only that, but it helps me ensure the quality of WordPress website being built by my agency.

If you found this helpful I suggest you check out my presentation [“Clone Yourself Through Automation”](#) where I share even more project efficiency tips!

And as always ... If I can help in any way please don't hesitate to reach out.

**PS: [Download a PDF of this process now!](#)**

### Full Unedited Transcript

Hello, Jocelyn Mozak here with Mozak Design.

I want to share with you today how I leveraged WP Engine and Seed Sites, basically sort of bare-bones sites that have all of the themes, plugins, and anything else I might want to speed up and optimize my development process.

Right now you can see inside of my WP Engine site, I have three Seed Sites that I use and the only difference between them is the theme installed. I have Beaver Builder, Divi, and Elementor. These are the ones I'm typically moving within. I can certainly leverage any of these if there's for some

reason, some other theme I might be using, but I don't remember the last time I used another one.

(0:46) So each of these, if we were to look at them and login to one, for example, let's grab Beaver Builder for example. If I go ahead and I go into this site and log in, you can see it's the default. There's nothing fancy here, nothing special has been set up. But what I do have back here, for example, is my plugin. So these are kind of my go-to plugins. They change sometimes, but this is kind of reflective of the plugins we're using right now. Most of them are off, the only ones that are on are the ones that support the theme I'm using, classic editor because, well, right now I'm not so sure I want to use Gutenberg. This is basically Manage WP, which I use to manage my sites. That may very well be another video for how to save yourself time leveraging tools. But that is the utility I use. And these are just other things like gravity forms or responsive menu. All of my sites gets a video user manual as kind of a bonus, although frankly, I don't know how my clients actually use it. I have some upgrades, like the ultimate add odds for Beaver Builder that as I need, I will activate WP Ultimate.

(2:04) These are all things that as the project progresses in our checklist and based on needs, we'll turn on plugins as needed. And then at launch, whatever ones are not activated, we go and we remove. And any ones that we found that we needed to add, that's what we look at them on a case by case basis and say, "Is this a plugin that is now becoming part of our process? And if so, it needs to go in the documentation of our, you know, standard plugins and add it to our Seed Sites. Again, super easy to do leveraging Manage WP. I keep all of these Seed Sites up to date along with all my maintenance clients.

(2:44) Under appearances, I have things set up nice and clean. I have Beaver Builder, the core theme, I have a child theme should I need it. And then I just keep one other kind of default WordPress theme. Otherwise, I keep this folder nice and clean. So closing this, if and when I am ready to create a new site, what I will do is as follows. So as a developer, WP Engine gives us a complimentary development account where we can have as many transfer sites as we want. This may be true for any site within them, but I do know that as a developer I applied and I actually have one complimentary live site on WP and then because I do refer to them because they are my host of choice.

(3:33) So when I'm ready to have a new client, let's say I have a new client, I'm going to add a site and the site name is going to be something like ... and I need to make it unique. So I'm trying to come up with something clever that doesn't take anything too good. Let's do new MD clients.

(3:51) I'm going to copy of this so I have it in memory and instead of putting it my seed area, I'm going to put it in development. So I've kind of got some structure here. I have Seed Sites, development sites, my own live sites and just things that I'm archiving. Maybe I don't want to delete them, but I don't want them kind of cluttering up my active area. So I'm going to put this in development and it's going to be a transferable site. From my account I'm only allowed one live site, it doesn't matter this is development and transferable is beautiful. You can easily use a code and

switch it over to your clients. WP Engine account when you're ready or if WP Engine is not the final host, you move it as you would typically move aside.

(4:34) So I'm going to go ahead and add the site and I will give it a moment and I'm going to use it, instead of a brand new site, I'm going to copy from existing. So I'm going to also go ahead and just [inaudible 00:04:46] at this and I'm going to copy it from, let's say it's a Beaver Builder site. So I'm going to grab Beaver Builder if it was Elementor I'd grab Elementor and Divi, Divi. So it's a Beaver Builder site and it's going to create the environment basically making a clone of my staging area. So when I log into this new MD site, it's going to have all my plugins, all my theme, everything ready to go per how you're doing things.

(5:14) Now while it sets this up, I'm going to do some stuff, but one thing I like to have consistency, and they always set it up with demo and then a password. And so to make my life simple I go and change the password and hopefully, it will keep this as it sets it up. I'm going to change the password to be my new client. So this way this is a nice kind of system and process where it's not a guess to my developer or anyone on the team with the password's going to look like. It's always demo and then, essentially, our development link name.

(5:52) Additionally, I like to set up SFTP users while I'm in here just in case we need it. So I'm going to add a user and again I always follow the same naming convention and Mozak Design. The password, I will go ahead and let it pick one which I'm going to copy so I can save and then the environment is going to be production. So I'm going to go ahead and add that user and then I'm going to go over to my login document and I'm going to add that password and I'm going to ensure I have the user. And I actually want to add one more thing, which is the SFTP address and the port. That's for making a simple cut and paste when needed.

(6:45) The last thing we need to do is wait until the development area is finished setting up. Once it is, we can log into our WordPress admin area using the password that we know is valid from the staging Seed Site and once we log in we're going to change it to something unique for this development site. And we'll come over to our document and put it in here. And this way we have a master of the development area where all the usernames and logins are. We can also append to this site the live information for the site for the client going forward once we know who their final host is and what the logins are going to be for that host.

(7:24) So now that we come back over here and we can see that the message is gone, we know we can log in. We'll simply use demo and the development site name. The first thing I'll do is come over to my profile, generate a new password, update the profile, come to my documents and save the password. And so now my developer and my team have everything they need to go and execute this. And likewise, if I need to log in if this is all ... this is typically not set up by myself, it's set up by my team. So I ever need to have access to any of this stuff. I immediately know where to find it.

(8:19) After this, just to give you some additional insight as to my process, it does continue on. My



[inaudible 00:08:26] developer then adds them to Orion or Manage WP, which is where we keep all of our clients, where we can keep their software up to date, backed up, do things like performance scans, have malware scans, just generally where we keep our sites to ensure the health of the site. But this hopefully should give you a quick getting started overview on how I use WP Engine to effectively have Seed Sites. And then so as a result, very quickly, very consistently setting up in all the areas for new builds in my agency. So we have a consistent starting point and as a result, consistent process.

(9:03) If you have any questions at all, please don't hesitate to reach out. You can find me at [mosakdesign.com](http://mosakdesign.com) or email me at [jocelyn@mozakdesign.com](mailto:jocelyn@mozakdesign.com). Find me on Facebook, find me on Twitter, find me pretty much anywhere on the web. I always love to connect, help and support others as they really do these type of things in their business so they can love their business and do the fun stuff as opposed to some of this tedious stuff and really help them to up-level the quality of their business as they step in from being a freelancer who's kind of just doing this to feeling like a professional business that has all of these systems and processes in place.

(9:43) There is going to be a supplemental document that goes alongside this with screenshots showcasing the different things that I showed along the way in this video. And you can feel free to download it, save it to your own Google doc, whatever works for you. And that may be is your very first system and process in your business. And if so, I congratulate you for taking the first step. Have an amazing day. Bye.