

FILE SHARING & ACCOUNT ACCESS

To begin work efficiently, Willowmark & Co. Designs may require access to certain accounts, files, and brand assets.

Account Access

Depending on the services provided, you may be asked to grant access to:

- Social Media Accounts
- Meta Business Suite
- Canva
- Google Business Profile
- Website Platforms
- Email Marketing Platforms
- Scheduling Tools
- Other Business Software

For security purposes, account access should be granted through user permissions whenever possible rather than sharing passwords directly.

Brand Assets & Business Materials

To ensure consistency across all content and communications, please provide any available brand materials, including:

- Logo files (PNG, SVG, PDF, or AI format preferred)
- Brand colour codes
- Brand fonts
- Brand guidelines (if available)
- Professional photos
- Product or service images
- Marketing materials
- Previous graphics or templates
- Business descriptions and service/pricing information,

Access & Asset Guide

A separate Access & Asset Guide has been provided outlining:

- How to grant account access
- How to share files securely
- A complete onboarding checklist
- Recommended file formats and assets
- Additional materials that may help support your project

SOCIAL MEDIA ACCOUNT ACCESS

Account Access Instructions

For security purposes, Willowmark & Co. Designs recommends granting access through user permissions whenever possible rather than sharing passwords directly

Facebook Page Access

- Log into Facebook.
- Navigate to your Facebook Business Page.
- Select Settings.
- Click Page Access.
- Under "People with Facebook Access," click Add New.
- Enter: [**willowmarkandco@gmail.com**]
- Assign the appropriate level of access.
- Send the invitation.

Once submitted, Willowmark & Co. Designs will accept the invitation.

Instagram Account Access

If your Instagram account is connected to Meta Business Suite:

- Log into Meta Business Suite.
- Go to Settings.
- Select People.
- Add [**willowmarkandco@gmail.com**].
- Assign access to the connected Instagram account.
- Save changes.

If your account is not connected to Meta Business Suite, instructions may vary depending on account setup.

Meta Business Suite Access

- Visit business.facebook.com.
- Click Settings.
- Select People.
- Click Invite People.
- Enter: [**willowmarkandco@gmail.com**].
- Assign employee access.
- Select the Facebook Page and Instagram Account.
- Grant required permissions.
- Send invitation.

FILE SHARING & ACCOUNT ACCESS

Canva Access

Option 1 – Invite to Existing Team

- Open Canva.
- Select Settings.
- Click People.
- Choose Invite Members.
- Enter: [**willowmarkandco@gmail.com**].
- Assign appropriate permissions.
- Send invitation.

Option 2 – Share Existing Designs

- Open the design.
- Click Share.
- Enter: [**willowmarkandco@gmail.com**].
- Grant editing access.
- Send invitation.

Google Business Profile Access

- Log into your Google Business Profile.
- Click Business Profile Settings.
- Select People and Access.
- Click Add.
- Enter: [**willowmarkandco@gmail.com**].
- Select Manager access.
- Send invitation.

WEBSITE ACCESS

Granting Website Access

To begin working on your website, I'll need to be added as a collaborator or administrator. Please follow the instructions below for the platform your website uses. Please do not send me your password. Adding me as a user is the safest and most secure option.

Shopify

1. Log in to your Shopify Admin.
2. Go to Settings → Users and Permissions.
3. Click Add Staff (or Add User).
4. Enter: [**willowmarkandco@gmail.com**].
5. Grant the permissions we have discussed (typically Online Store, Products, Content, Themes, Apps, and Settings as needed).
6. Click Send Invite.

Wix

1. Log in to your Wix account.
2. Select your website.
3. Go to Settings → Roles & Permissions.
4. Click Invite People.
5. Enter: [**willowmarkandco@gmail.com**].
6. Select the appropriate role (such as Website Manager or a custom role with the required permissions).
7. Click Send Invite.

Squarespace

1. Log in to your Squarespace account.
2. Open the website you'd like me to work on.
3. Navigate to Settings → Permissions.
4. Click Invite Contributor.
5. Enter: [**willowmarkandco@gmail.com**].
6. Select the Administrator role (unless we have discussed a different permission level).
7. Click Invite.

WordPress

Self-Hosted WordPress (WordPress.org)

1. Log in to your WordPress Dashboard.
2. Go to Users → Add New User.
3. Enter: [**willowmarkandco@gmail.com**].
4. Assign the role of Administrator.
5. Click Add New User.

WEBSITE ACCESS

WordPress.com

- Log in to your WordPress.com account.
- Select your website.
- Go to Settings → People.
- Click Invite.
- Enter: [**willowmarkandco@gmail.com**].
- Select Administrator.
- Send the invitation.

After You've Sent the Invitation

Once you've sent the invitation, I'll receive an email to accept access. Please let me know once it's been sent so I can confirm everything is working correctly.

If you have any questions or run into any issues, don't hesitate to reach out—I'm happy to help.

EMAIL PLATFORM ACCESS

Email Marketing Platform Access

If you use an email marketing platform such as Mailchimp, Constant Contact, Flodesk, ConvertKit, or similar:

- Log into your account.
- Navigate to Users, Team Members, or Account Access.
- Invite: [Your Email Address]
- Assign appropriate permissions.
- Send invitation.

Additional Notes

Please upload files and assets to the shared folder provided or send them through the agreed-upon file-sharing method.

If you are unsure how to provide access to any platform, please reach out and assistance will be provided.

Thank you for helping create a smooth onboarding experience. The more complete your onboarding materials are, the faster Willowmark & Co. Designs can begin supporting your business.

FILE DELIVERY

File Delivery

All completed project files and deliverables will be shared with you through a secure Google Drive folder.

Your Google Drive folder may include:

- Brand files (logos, icons, and brand assets)
- Social media graphics
- Website graphics and images
- Marketing materials
- PDF documents
- Final project files
- Any other agreed-upon deliverables

You'll receive a shareable Google Drive link once your project is complete. I recommend saving this link for future reference, as it will serve as your central location for accessing your files.

If you'd like to upload content for me to use (such as photos, logos, documents, or website copy), you can also upload them directly to your shared Google Drive folder. This helps keep everything organized in one place and ensures nothing gets lost in email attachments.

Please note that it is your responsibility to download and back up your files for long-term storage. While I strive to keep client files available whenever possible, I cannot guarantee permanent storage indefinitely.