Safe Access & Permission Checklist

Give the Right Access Without Sharing the Owner Login

Section 4: Shopify Account & Admin Setup

Video: Users, Collaborators and Safe Access

Use this checklist whenever another person needs access to your Shopify store.

The goal is simple: keep the owner account private, understand why access is required, and give only the permissions needed for the task.

1 Owner vs Staff / User vs Collaborator

OWNER

Purpose

Main account that controls the store.

Key points

- Keep the owner email and password private
- Owner account should remain under the business/store owner's control
- Important for account recovery and overall store control
- Do not casually share this login

STAFF / USER

Purpose

A team member added to the store for ongoing work.

Key points

- Access depends on plan and available user features
- Give only the roles/permissions needed for their job
- Examples may include product, order, support or marketing staff

COLLABORATOR

Purpose

Developer, designer, agency or partner who requests access without using the owner login.

Key points

- Prefer collaborator-style access for external professionals where appropriate
- Review the requested permissions before approval
- Remove access when the work is finished

IMPORTANT RULE

Do not share the owner login just because someone needs to work on the store.

2 Safe Access Rules

- [ ] I know who is requesting access
- [ ] I understand what work they need to perform
- [ ] I know why each requested permission is needed
- [ ] I am giving only the minimum permissions required
- [ ] I am avoiding unnecessary billing or payment access
- [ ] I am avoiding unnecessary user-management access
- [ ] I am avoiding unnecessary customer-data access
- [ ] I will review access again after the work is complete
- [ ] I will remove old or unnecessary access

Minimum access does not mean refusing every request. If a developer or team member genuinely needs a permission for their work, understand the reason and then grant the appropriate access.

3 Plan / Access Availability Reminder

Shopify access options can vary by plan and account type.

Some plans may allow broader staff/user management, while other setups may rely more on collaborator access for external developers or partners.

Always review the options currently available inside your own Shopify account.

Common Permission Examples

These are planning examples, not rigid rules. Actual permissions should match the person's real responsibilities.

4 DEVELOPER / DESIGNER

Typical needs may include:
- Theme / Online Store
- Relevant content/pages
- Files
- Specific settings needed for development work

Usually avoid unless genuinely required:
- Billing
- Payments / payouts
- Full user management
- Sensitive customer data

Use collaborator access where appropriate.

5 PRODUCT MANAGER

Typical needs may include:
- Products
- Collections
- Inventory
- Files
- Basic product-related content

Usually does not need:
- Billing
- Payments
- User management

6 ORDER / SUPPORT STAFF

Typical needs may include:
- Orders
- Customers
- Fulfilment-related access

Be careful with:
- Refund permissions
- Export permissions
- Personal customer data
- High-risk order actions

7 MARKETING STAFF

Typical needs may include:
- Discounts
- Analytics
- Marketing / growth tools
- Relevant content

Usually does not need:
- Owner access
- Billing
- Payments
- User management

8 Permission Request Review

Before approving access, ask:

1. Who is requesting access?
2. What exact task are they performing?
3. Which Shopify area do they need?
4. Why is that permission necessary?
5. Is there a more limited permission that would still work?
6. Does the person need this access permanently or temporarily?
7. When should the access be reviewed or removed?

Person / Company: _____

Role / Work: _____

Access Needed: _____

Reason: _____

Review / Remove Access After: _____

Review, Secure and Close Out Access

9 Collaborator Access Reminder

- [ ] I found the collaborator/access area if needed
- [ ] I understand that a collaborator should not require my owner password
- [ ] I reviewed the requested permissions before approving
- [ ] I will remove collaborator access after the work is complete

A collaborator request can include permissions that are genuinely needed for the project. Review the reason before approving rather than automatically accepting or rejecting everything.

10 Security Awareness

- [ ] Owner login stays private
- [ ] Recovery email / account access remains under my control
- [ ] I know Shopify provides additional security options
- [ ] I will review two-step authentication separately

Two-step authentication was not configured in detail in this lesson. Treat it as an important security topic to review separately.

11 Final Safe Access Check

- [ ] Owner login is private
- [ ] User / collaborator role is clear
- [ ] Only required permissions are granted
- [ ] Sensitive permissions were reviewed carefully
- [ ] Access duration is understood
- [ ] I know when to review/remove the access
- [ ] Unnecessary old users or collaborators have been removed

- [ ] **SAFE ACCESS REVIEW COMPLETE**

If the access decision is clear, continue to the next lesson: **Billing, Plans and App Charges.**

If you are unsure what access a developer, designer, staff member or agency actually needs, use the Shopify Course Help & Direction Form from the resource hub before sharing the owner login.