

What are Actions?

Summary

Actions are BuilderPal's way of turning real construction work into trackable, accountable items. They capture what needs to happen, who owns it, and the conversation and documents around it—all in one place.



Why It Matters

The problem Actions solve

- Work gets scattered across texts, emails, notes, and calendars
- It's unclear who owns what
- Important details and decisions get buried in chat threads

The Benefit to Contractors

- Every piece of work has a clear owner
- Communication stays tied to the work itself
- Nothing slips through the cracks because updates, files, and decisions live in one place

Actions replace loose follow-ups with structure—without adding complexity.

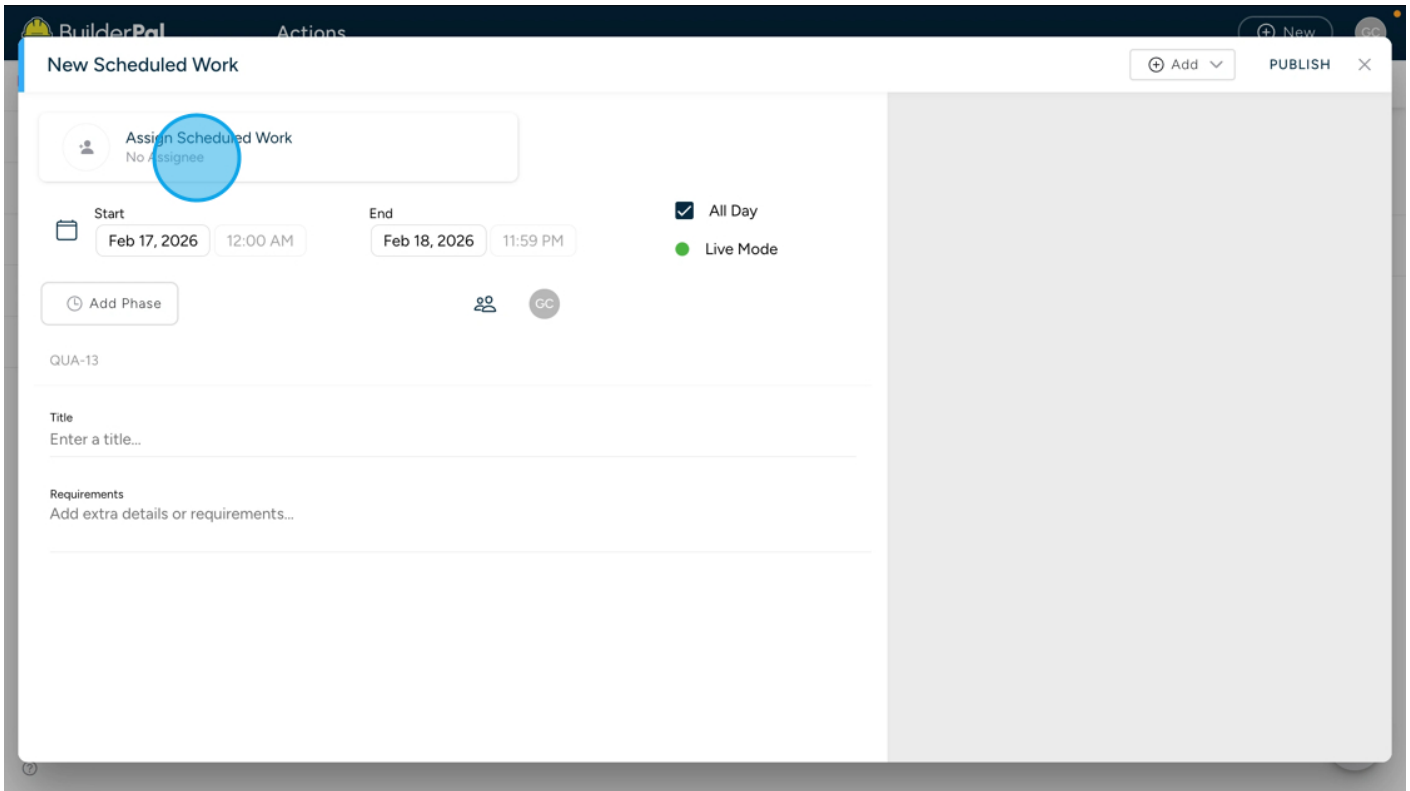
How It Works

Actions are the core work items in BuilderPal.

Almost everything that happens on a project—work, questions, approvals, purchases, fixes—lives inside an Action.

At a high level, every Action includes:

- A title that describes the work
- An Action type (Scheduled Work, Punch List, RFI, etc.)
- An owner (the assignee responsible for it)
- Participants who need visibility or updates
- Requirements, comments, and attachments
- A status that reflects where things stand



While Actions used to be called “tasks,” they go further than a basic task. An Action combines:

- The work itself
- The communication about that work
- The documents and decisions tied to it

Different Action types add structure for different situations:

- Scheduled Work adds dates and scheduling
- Punch Lists track fixes and deficiencies
- RFIs capture questions and clarifications
- Change Orders, Purchase Orders, and Bills handle scope and cost

Some Actions can also be linked together, reflecting how real work, approvals, and costs connect on a project—but each one still stands on its own as a single source of truth.

When to Use Actions

Use an Action whenever:

- Someone needs to do something
- A question needs to be answered
- Work needs to be scheduled or tracked
- A decision, approval, or cost needs documentation

If it matters to the project, it should be an Action.

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Revision #6

Created 5 November 2025 15:56:03 by Gabe

Updated 17 February 2026 19:28:30 by Mikey