

# Roles & Permissions Overview

## Summary

Every person on your team has a **role**, and that role determines what they can see and do inside BuilderPal. This article gives you a clear overview of the six main roles, how permissions work, and what to expect when different people open the same project. It also explains additional time-tracking permissions you can turn on for specific users.

BuilderPal uses two layers of access:

1. **Team Roles** – Company-wide permissions assigned in Team Settings.
2. **Project Access** – Project-level roles that determine visibility within a specific project.

Project access does *not* change someone's team role. To learn how project involvement works, see:

[Project Access Explained](#)

Team roles define **what** someone is allowed to do. Project access defines **where** they can do it.

## Prerequisites

- You must be a **Team Administrator** to assign or modify roles.
- Users must already be added to your BuilderPal team.

## Team Roles (Company-Level Permissions)

These six roles define the core permission sets inside BuilderPal.

# Team Administrator

Highest-level access. Admins control all company settings and operations.

Admins can:

- Access every project (internal and client projects)
- View and edit all financial data (budgets, estimates, financial widget)
- Manage subcontractors and bidding
- Add or remove users and change roles
- Configure billing, time tracking, and company settings

This role is intended for owners or operational leads.

# Business Manager

Business Managers handle bidding and subcontractor workflows **without any financial visibility**.

Business Managers can:

- Create and manage subcontractors
- Build and manage bid packages on master projects
- Review bids, compare pricing, and mark winners
- Control which subcontractors are involved in specific projects

Business Managers cannot:

- View budgets or estimates
- See the financial widget anywhere in the app
- Access company-level financial settings or reports

They manage procurement and vendor relationships, not finance.

# Finance Manager

Finance Managers focus on project costs and financial performance.

Finance Managers can:

- View and manage Estimates and Budgets
- Review and manage financial reports
- Work with cost codes and other accounting-related data
- View the financial widget inside projects

Finance Managers do not manage bidding or subcontractors.

# Project Manager

Project Managers run the day-to-day execution of projects.

Project Managers can:

- Create and manage projects
- Edit project details and settings
- Manage schedules, actions, RFIs, site instructions, and change orders

- Manage documents, job chat, and project participants
- View all project-level financials (estimates, budgets, financial widget)
- Manage subcontractors and bidding on master projects

They cannot change company-wide settings.

## Team Member

Team Members complete work assigned to them in the field or office.

Team Members can:

- Log hours on projects where they are participants
- Complete assigned tasks and scheduled actions
- Upload documents, photos, and updates
- Participate in job chat and use site-level tools as allowed

Team Members cannot:

- View any financial data (no budgets, estimates, or financial widget)
- Manage participants or project settings
- Manage subcontractors or bidding

This is the standard role for most workers on your team.

## Team Supervisor

Team Supervisors coordinate on-site work and approvals.

Team Supervisors can:

- Approve time entries for the people they supervise
- Assign tasks and actions to Team Members
- Monitor jobsite progress using schedules, actions, and documents

Team Supervisors cannot:

- View financial data
- Manage company settings, billing, or roles
- Manage bidding or subcontractors

### **Additional Pro Time-Tracking Permissions**

These options are **add-on time-tracking controls**, not separate roles. You can toggle them on for users who track time in BuilderPal to enforce more accurate behavior.

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## Clock-in Required

When **Clock-in Required** is enabled for a user:

- They must use the **live timer** to record time
- Manual time entry is blocked

Use this when you want strict real-time tracking instead of manual adjustments.

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## Clock-in Location

When **Clock-in Location** is enabled for a user:

- Clock-ins must happen **within the jobsite's GPS boundary**
- Clock-ins outside that radius are blocked or flagged

Use this when you need to confirm that users are physically on site when they start work.

### Want to use these features?

Clock-in Required and Clock-in Location are available with **BuilderPal Pro**.

[Learn more about Pro →](#)

### Related Articles

- [Manage Team Member Permissions](#)
  - [Project Access Explained](#)
  - [Learn the Project Dashboard](#)
  - [Pro User Permissions](#)
  - [Permissions & Participants in Actions](#)
  - [Office Permissions and Access](#)
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