

# Manage Your Projects

Everything you need to control what happens inside a project — update details, manage participants, adjust settings, and understand project roles.

- [How Projects Relate to Subcontractors](#)
- [Edit Project Details](#)
- [Project Access Explained](#)
- [Project Settings Reference](#)
- [Manage Project Participants](#)
- [Sharing & Visibility Rules](#)

# How Projects Relate to Subcontractors

## Summary

In BuilderPal, **subcontractors are directly tied to each project**. Each one acts as a trade-specific workspace that connects planning, communication, documents, and bidding — all inside a single job.

This is what lets you break a complex build into clean, manageable scopes without losing structure.

## Subcontractors Live Inside Projects

Every subcontractor belongs to a specific project.

They are not global company records or random contacts — they are **project-based workspaces created for that job only**.

For example, on a renovation project like:

### 16 Ave Farm House Renovation

You might create subcontractors for:

• Plumber • Electrician • Concrete Contractor • Drywall Installer • HVAC Tech

Each one is tied only to that project and its scope of work.

## They Structure Work by Trade

Subcontractors organize your project by scope, not just by name.

This allows you to:

- Assign actions by trade
- Upload trade-specific documents
- Structure bid packages by scope
- Track progress by subcontractor
- Keep communication clean and separated

Instead of one giant task list, each subcontractor holds its own slice of the project.

## **They Exist Before Hiring Anyone**

You don't need to have a real contractor yet.

Subcontractors can be created early so you can:

- Start planning scopes
- Assign actions
- Upload documents
- Build bid packages
- Organize responsibilities

All before a real person or company is involved.

This means you can structure your entire project **before awarding a single job**.

## **They Connect Actions to Responsibility**

Subcontractors aren't just labels.

They define who the work is intended for.

When you assign actions to a subcontractor, those actions become part of that trade's scope. Once you later award a contract, everything already assigned moves with that subcontractor automatically.

This keeps your planning intact even as real people get involved later.

## **They Power the Bidding Flow**

Subcontractors are central to BuilderPal's bidding process.

Each one can be used to:

- Create bid packages
- Send bid requests
- Compare estimates
- Award jobs
- Manage post-award communication

Once awarded, the subcontractor workspace becomes the contractor's operational area for that job.

## They Control Document Flow

Each subcontractor has its own document section.

This allows you to:

- Keep plans isolated by trade
- Control access per subcontractor
- Share only what they need
- Prevent cross-trade confusion

Documents stay grouped under the correct scope instead of floating loosely across the project.

## They Influence Scheduling

Because subcontractors hold actions and assigned responsibilities, they naturally feed into:

- Scheduling
- Dependencies
- Workflow planning
- Timeline coordination

You're timing *scopes*, not just individual people — which makes changes easier when crews change or availability shifts.

## How Everything Ties Together

Think of it like this:

The **Project** is the container.

Inside it:

- Subcontractors define scopes
- Actions define work
- Documents define information
- Bids define pricing
- Awarded contacts define the people

Everything flows through the subcontractor structure.

## Related Articles

- [Create a Subcontractor](#)
- [Award Contact](#)
- [Trades & Cost Breakdown](#)

# Edit Project Details

## Summary

Update your project settings, including status, assigned manager, address, and adding actions or documents to a project. This guide will show you how to customize project configurations and attach files as the job progresses.

## Prerequisites

- **Role or permission needed:** Admin (GC), Admin (SUB), Admin (SHORTCUT), Team Project Manager, or Team Business Manager
- **Setup required:** Log in to BuilderPal and have an active project selected

## Steps

### 1. Access the Projects Section and Open a Project

- From the main dashboard, click **Projects**.
- Select a project from the list



### 2. Update Project Status and Assigned Manager

- Click the current project status (e.g., **In Progress**).
- Select a new status (e.g., **Planning**).
- Click **Assigned Manager**.
- Select a manager (e.g., *Porter Dietrich*).
- Click **Settings**.
- Update the manager role as needed (e.g., **Team Administrator**).



- Click **Save** to apply the updates.

### 3. Edit the Project Address

- Click the project address (e.g., *1333 South Park Street, Halifax, NS B3J 2K9 Canada*).
- Click **Save** to apply changes.



#### 4. Add an Action

- Click **View all actions**.
- Click **Add actions to your project**.
- Select **Scheduled Work**.



#### 5. Upload a Project Document

- Click **Upload Document**.
- Select **Add file from project documents**.
- Confirm to attach the document.



### Tips

- **Pro tip:** Update notification settings in **Settings** to control email alerts for changes such as new actions or uploaded documents.
- **Time saver:** Use **Job Chat** to add actions and documents without navigating multiple menus.

### Related Articles

- [Learn The Project Dashboard](#)
- [Manage Project Participants](#)
- [Navigate Your Projects](#)
- [Organize Your Projects](#)
- [Project Access Explained](#)

- [How to Create a New Project](#)

# Project Access Explained

## Summary

This article explains how project access works in BuilderPal—who can see which projects, how team boundaries affect visibility, and how General Contractors and Subcontractors collaborate without ever sharing full project workspaces. Understanding these rules ensures your team knows exactly what each person can see and do inside BuilderPal.

## Prerequisites

- You understand your **team role** (Admin, PM, Supervisor, etc.).
- You have access to at least one project.

## How Project Access Works

Project access is determined by two separate systems:

1. **Your Role** — defines *what* you can do inside a project
2. **Your Project Access** — defines *which* projects you can open or see

These systems work together, but they are not the same.

A role does **not** grant visibility into every project—only into projects your team owns or ones you've been added to.

## 1. Projects Belong to Teams

Every project in BuilderPal is owned by a **team**, not an individual.

- Your GC organization owns GC-created projects
- Each subcontractor organization owns the subcontractor project automatically created when they are awarded work
- Internal Projects belong to your team
- Personal projects (My Tasks Workspace) belong **only to the individual user**

Because each organization owns their own projects:

**Project access never crosses team boundaries unless shared through an Action.**

## 2. Access Inside Your Own Team

Inside your company, your role determines visibility across your team's projects.

# Team Administrator

- Can see **every project your team owns**
- Can see **all actions** inside those projects
- Can manage roles, participants, settings, and financials

# Project Manager

- Can see **all projects owned by your team**
- Can view and manage all tasks, schedules, and documents

# Supervisors and Team Members

These roles can see:

- Projects they are added to
- Actions that are assigned to them
- Documents they have permission to view or upload

They cannot view projects they have not been invited into.

## 3. Cross-Team Access (GC ? Subcontractor)

When you hire a subcontractor and award a bid:

- A **GC Project** belongs to your team
- A **Subcontractor Project** belongs to the subcontractor's organization

Even though these two projects are related:

## What the GC Cannot See

- The subcontractor's project dashboard
- Their internal actions, schedules, or documents
- Their financials, budgets, or estimates
- Their Site Office or Reports
- Their participants list

## What the GC *Can* See

Only items shared through **Actions**, such as:

- Punch Lists
- RFIs
- Change Orders
- Purchase Orders & Bills
- Submitted documents
- Status updates

This ensures clean collaboration without exposing internal project data.

## 4. How Information Flows Between Teams

Projects are private.

Actions are shared.

Actions act as the “bridge” between GC and subcontractor teams.

## Each team can see:

- The actions assigned to them
- The comments and files inside those actions
- PO/Bill submissions
- Linked estimate/budget values *after* they are submitted

## Each team cannot see:

- Each other’s project workspaces
- Each other’s internal tasks or schedules
- Any private documents not shared through an action
- Any financials belonging to the other team

This mirrors real construction workflows—each company maintains its own internal job folder while collaborating through structured requests and deliverables.

## 5. Subcontractor Projects

When a subcontractor is awarded work, they receive a **full private project**, including:

- Their own estimate & budget
- Their own schedule and tasks
- Their own documents
- Their own financial center
- Their own Site Office
- Their own reports

The GC cannot open or browse this project.

## GC visibility into Subcontractor work:

- ✓ Assigned actions
- ✓ Submitted POs/Bills (through the action thread)
- ✓ Uploaded files within those actions
- ✓ Status updates
- ☐ Not their project contents

### 6. Upstream vs Downstream Assignments

Assignment direction controls visibility:

## GC ? Subcontractor (Downstream)

- GC sees everything related to the assigned action
- Subcontractor sees only that action—not the GC project
- Subs **cannot** assign tasks back upstream to the GC

## Subcontractor ? GC (Upstream)

- Subcontractors cannot originate upstream assignments
- They can only respond inside actions the GC created

This prevents upstream task creation and keeps responsibilities clear.

### 7. My Tasks Workspace vs Assigned Work

**My Tasks Workspace** is a **private personal project** that belongs only to you.

It does **not** belong to your team, and even Admins cannot open it unless you invite them.

Inside My Tasks:

- You see **only the tasks you create yourself**
- Only participants you manually invite can access it
- It does **not** show all tasks assigned to you across BuilderPal
- It does not inherit any team-level visibility rules
- It functions as your own personal workspace inside BuilderPal

To see tasks assigned to you across all projects, use your **To-Do List**, not My Tasks.

## FAQ

### **Can Admins see all projects?**

Admins can see all projects owned by *their own team*, but cannot access subcontractor-owned projects or personal My Tasks projects unless invited.

### **Can subcontractors see my GC project?**

No. Subcontractors only see actions assigned to them, not your full project workspace.

### **Do POs and Bills sync between GC and Sub projects?**

Yes—because they are Actions. The action thread manages visibility, not the project itself.

### **Can subcontractors assign actions to the GC?**

No. Work only flows downstream from GC → Sub.

### **Why can't I see a project someone mentioned?**

You must either:

- be added as a participant, or
- be part of the team that owns that project, or

### **Related Articles**

- [Manage Project Participants](#)
- [Upstream vs Downstream Assignments](#)
- [Sharing & Visibility Rules](#)
- [Roles & Permissions Overview](#)
- [Subcontractor Project Permissions & Visibility](#)

# Project Settings Reference

## Summary

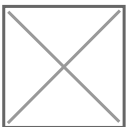
This reference covers the fields and options available in the Project Settings modal of BuilderPal, allowing users to edit core project information like name, manager, description, and color.

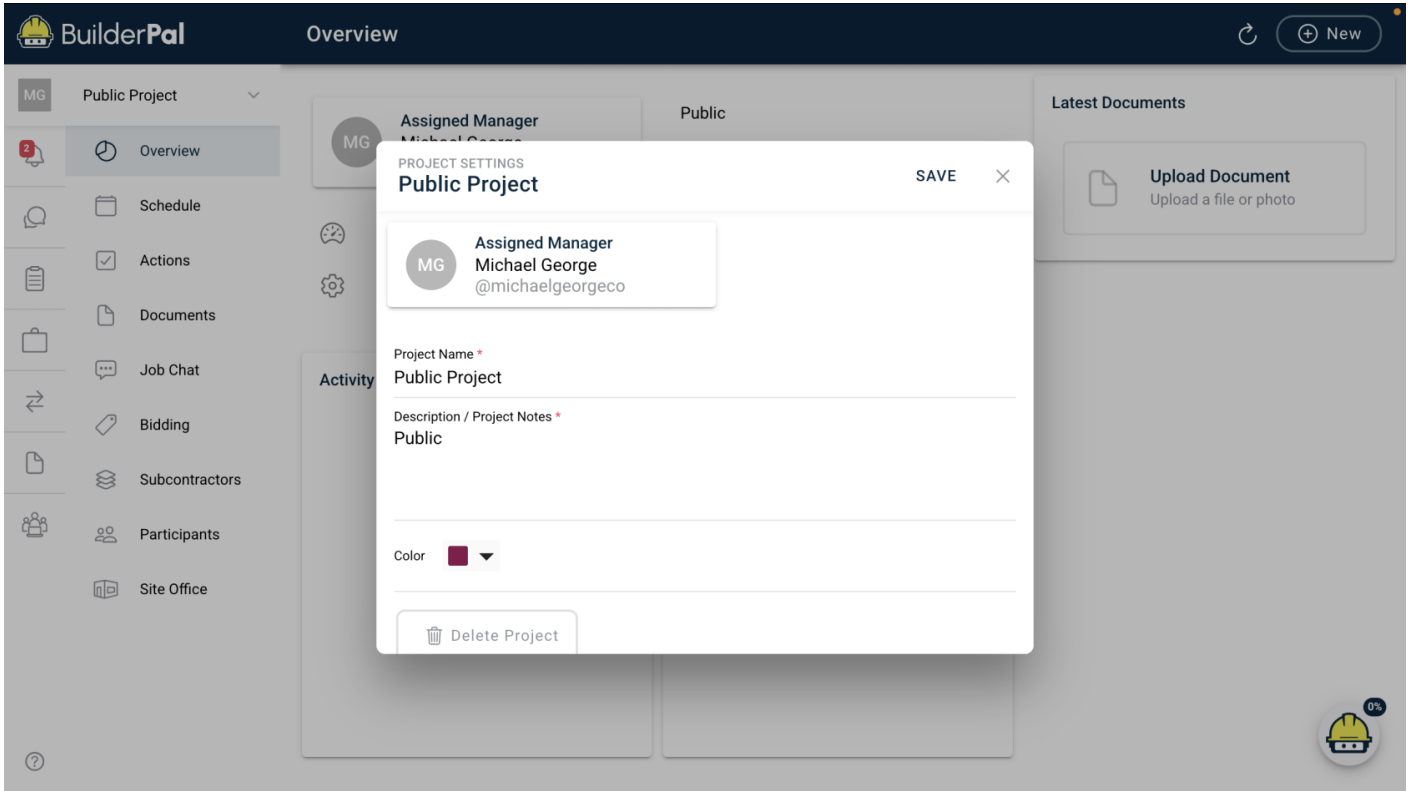
## Key Details

- Definition/description: Project Settings is the modal accessed from the dashboard for updating project metadata, manager, and appearance without affecting tasks or documents.
- Field or option meanings: Fields control project identification, leadership, notes, and visual tagging; see table for details.
- Role requirements: Editable by admins and project managers; view-only for other team roles.

## Table or List of Values

Item	Description	Notes
Assigned Manager	The user responsible for overseeing the project.	Dropdown of team members; changing sends notification. Example: "Michael George @michaelgeorgeco".
Project Name	The primary name of the project.	Required; used in lists and headers. Example: "Public Project".
Description / Project Notes	Additional details or notes about the project.	Optional text field for internal reference. Example: "Reno project notes".
Color	A color tag for visual identification in lists.	Dropdown of colors; helps with quick scanning. Example: Purple square.
Delete Project	Button to permanently remove the project.	Use with caution; deletes all associated data. No example (destructive action).





## Related Articles

- [Workflow / Tutorial: Edit Project Details](#)
- [Concept Overview: Project Lifecycle Overview](#)
- [Troubleshooting / FAQ: Dashboard Data Not Updating](#)

# Manage Project Participants

## Summary

This tutorial covers how to add team members to a project by opening the participants window, searching for users, and saving changes. It helps ensure the right people have access for collaboration and task assignment.

## Prerequisites

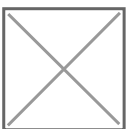
- Role or permission needed: Admin (GC), Admin (SUB), Admin (SHORTCUT), Team Project Manager, or Team Business Manager.
- Any setup required: Log in to BuilderPal and open an active project from the Projects menu.

## Steps

1. Open your Project from the Projects menu and click on the participants located on the right, beneath Job Chat.



2. Opening the Participants window will show all team members currently on the Project. Searching and selecting team members will then add them to the Project, then close the window.



3. Click "Save" to add the newly selected members to the Project.

## Confirmation

“You’ll know it worked when the participant list updates with the new members, and they receive an invitation or notification email.”

## Tips

- Pro tip or best practice: Review the team list after saving to confirm roles and access levels are correct for security.
- Shortcut or time saver: Use the search field to quickly find existing company members instead of typing full emails.

## Related Articles

- [Concept Overview: Roles & Permissions](#)
- [Reference: Project Access Explained](#)
- [Troubleshooting: Participant Not Receiving Invite](#)

# Sharing & Visibility Rules

## Summary

Sharing & Visibility Rules define *who can see what* inside BuilderPal—across projects, documents, tasks, and communication. BuilderPal keeps each team’s internal work private while surfacing only the information required for collaboration between General Contractors (GCs) and Subcontractors.

## Why It Matters

**The problem:** Construction teams need structured collaboration, not oversharing. GCs must coordinate multiple trades, while subcontractors must protect their internal workflows and documents.

**The benefit:** BuilderPal creates a clean separation between teams while automatically surfacing the information needed to work together—reducing confusion, preventing oversharing, and keeping every team in control of its own work.

## How It Works

# 1. Project Ownership

BuilderPal uses project ownership to determine what each team can see.

## GC-Owned Projects

The GC’s team can see:

- All GC-owned projects
- All tasks, documents, schedules, and job chats within those projects
- All subcontractor *surface-level* documents (not the sub’s full project)

## Subcontractor-Owned Projects

Created automatically when the GC awards a subcontract.

GC teams:

- **Cannot open** the subcontractor’s project
- Only see *surfaced information* relevant to the subcontracted scope
- Cannot see the sub’s schedule, internal tasks, or documents not uploaded by the sub

Subcontractor teams:

- Do **not** see the GC's full project
- Only see the tasks and documents that the GC assigns or shares

## 2. What Subcontractors Can See

Subs **can see**:

- Tasks assigned to them by the GC
- Tasks created inside their subcontractor project
- Files the GC shares downward
- Their private GC↔Sub job chat
- The optional general project chat (if they choose to join)

Subs **cannot see**:

- The GC's project
- Other subcontractors
- GC internal schedules, documents, or communication
- The GC's team members unless shared on an action

## 3. What the GC Can See From Subcontractors

GCs **cannot** access the subcontractor's actual project.

Instead, BuilderPal surfaces the subcontractor's uploads into:

### A. GC Project ? Subcontractors Page ? Documents Module

Shows:

- Files uploaded by the subcontractor into their own project
- Files the GC has shared with them

### B. GC Project ? Documents ? *Subcontractors* Folder

One folder per subcontractor, containing:

- All documents the sub uploaded (surfaced)
- Any GC-shared documents

GCs **cannot** see:

- The subcontractor's internal tasks
- The subcontractor's project schedule
- The subcontractor's internal documents unless uploaded through their project

## 4. Document Sharing Rules

### When Subs Upload Documents

Subs upload into **their subcontractor project**, not into the GC's folders.

BuilderPal then automatically mirrors their documents upstream into:

- GC Project → **Subcontractors** module
- GC Project → **Documents** → **Subcontractors** folder

Subs **never upload** into:

- "Shared From Contractor" (this is read-only for GC-shared files)
- GC project folders

### When GCs Share Documents

GC files shared downward appear in the subcontractor's project in:

- **Shared From Contractor** (read-only)

## 5. Schedule Visibility

### Subcontractors See:

- Only tasks assigned to them
- Tasks they've created inside their subcontractor project

Subs **do not see**:

- GC's full schedule
- Other trades
- GC sequencing unless manually exported and shared

### GC Sees:

- All GC tasks
- All tasks assigned to subcontractors
- Any sub-created tasks that fall within their subcontractor project scope

## 6. Job Chat Visibility

Each subcontractor has:

### A. A private GC ? Sub chat channel

- Exclusive to the GC team and that subcontractor's team
- Used for scope-specific questions, updates, files

### B. A general project chat channel (optional for everyone)

- **No one is auto-added**
- GC team and subs may join if they choose

Subs **cannot** access:

- GC-only channels
- Other subcontractor channels

## 7. Task & Activity Visibility

### Subcontractors Can See:

- Tasks assigned by the GC
- Tasks they create themselves

### GCs Can See:

- All GC tasks
- Tasks assigned to subcontractors
- Tasks subcontractors create as part of their subcontracted work

GCs **cannot see**:

- Internal subcontractor tasks inside the subcontractor project unless surfaced

## 8. My Tasks Workspace Visibility

The **My Tasks Workspace** is personal to each user.

- Belongs to the user, not the team
- GC Admins cannot see anyone else's My Tasks Workspace
- Subcontractors cannot see GC workspaces
- Only tasks assigned to *you* or created *by you* appear here

It functions as a personal organizational dashboard—completely private unless you choose to invite someone.

## Real-World Example

1. A GC awards a plumbing subcontract.
2. BuilderPal creates a **Plumber Subcontractor Project** (owned by the plumber).
3. The GC assigns tasks to the plumber.
4. The plumber uploads drawings → they surface automatically into the GC's subcontractor folders.
5. The GC shares updated site drawings → they appear in the plumber's **Shared From Contractor** folder.
6. Both teams communicate in the private GC↔Plumber chat channel.
7. No team sees information unrelated to their scope.

## When to Use This Article

Use these rules when you need to understand:

- Why subcontractors cannot see the full project
- Why GC cannot open subcontractor projects
- Where subcontractor files show up for the GC
- How tasks and schedules stay separated yet coordinated
- How job chat channels are structured

## Related Articles

- [Project Access Explained](#)
- [How Projects Relate to Subcontractors](#)
- [Permissions & Participants in Actions](#)
- [Attaching Documents](#)