

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](#)

Revision #8

Created 5 November 2025 15:49:55 by Gabe

Updated 21 January 2026 23:15:10 by Mikey