

Managing and Working Inside an Internal Project

Summary

This tutorial covers how to manage and collaborate inside an internal project in BuilderPal, including adding participants, assigning tasks, and using core tools. It's useful for team-only workflows like training or operations, keeping data private from clients or subs.

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 have an internal project created (see related articles for creation).

Steps

1. Open the Projects Menu

Click on your internal project to open it. In the project dashboard, you can add Participants, search for team members, assign roles, and save to add them.

2. Assign Tasks

○ Instruction: Go to Actions or Tasks section, click Add Action, enter details, assign to team members, and save.

○ Screenshot: Only if not obvious.

3. Upload Documents

○ Instruction: Navigate to Documents, click Upload, select file, and add to share with the team.

○ Screenshot: Only if not obvious.

4. Use Job Chat

○ Instruction: Click Job Chat to start discussions, create channels, and collaborate in real-time.

○ Screenshot: Only if not obvious.

Confirmation

“You’ll know it worked when the internal project updates with new participants, tasks, documents, and chat messages visible only to your team.”

Tips

- Pro tip or best practice: Use internal projects for sensitive team data to avoid accidental sharing with clients.
- Shortcut or time saver: Duplicate tasks or documents from other internal projects to speed up setup.

Related Articles

- [Concept Overview: What Are Internal Projects](#)
- [Workflow / Tutorial: How to Create a New Project](#)
- [Workflow / Tutorial: Manage Project Participants](#)
- [Workflow / Tutorial: Managing Project Tasks](#)
- [Concept / Overview: Project Lifecycle Overview](#)
- [Reference: Project Access Explained](#)

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