

Create Groups

Summary

This tutorial guides you through creating a group in BuilderPal to organize your team members efficiently. Groups enable quick tagging for assignments, communications, and permissions across projects, helping streamline collaboration and task management for larger teams.

Prerequisites

- Access to the Company Back Office (available to Admins and select team roles).
- At least one team member added to your company.

Steps

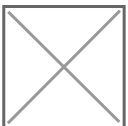
1. **Navigate to the Groups page.** Go to <https://app.builderpal.com/company-back-office> and select **Groups** from the Team & Company Settings section.



2. **Start creating a group.** Click **Create Group** or the plus icon in the top right corner to open the group setup dialog.



3. **Set up group details and add members.** Enter a name and description for the group, then use the search bar to select and add users; click **Save** to confirm.



4. **Review the new group.** Verify the group appears in your list, with members now tagged for easy reference.



Confirmation

You can now view your group and group members will receive a tag.

FAQ

Q: Who can create groups in BuilderPal?

A: Admins (GC, SUB, SHORTCUT) and roles like Team Project Manager, Team Finance Manager, and Team Business Manager have access via Company Back Office.

Q: Can I add users who aren't yet team members?

A: No, the search bar only shows existing team members; add them first using the Create Team Members workflow.

Q: What happens if I don't add a description?

A: The group will still save, but a description helps clarify its purpose for other users viewing the group list.

Q: How do groups affect permissions?

A: Groups simplify tagging but don't directly set permissions; manage those separately in Team Member Permissions.

Q: Can I use groups across projects?

A: Yes, groups are company-wide and can be tagged in any project for assignments or mentions.

Related Articles

- [Create Team Members](#)
- [Team Member Permissions](#)
- [Manage Contacts](#)
- [Edit Company Profile](#)
- [Time-tracking & Kiosk App Control Center](#)

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