SalesJobsProject ManagementFilesMessagingFinancial Reports

Search

PG

Manage role

Company settings

Role management/Manage role

Role name

Admin

View users

2 assigned

Role description

Primary Access/Responsibilities:

- Access and edit most entities in Buildertrend (including Project Management, Financials, Sales, and company settings)
- View and manage users and roles

Best For:

- Managers who need to access most aspects of the companyÕs Buildertrend account

Sales

Leads   View, Add, Edit, Delete

☐

Assign Salesperson

☐

View other Salesperson Leads & Activities

☐

Create a Job

☐

Export to Excel

Project management

Schedule   View, Add, Edit, Delete

Set Baseline

Daily logs   View, Add, Edit, Delete

To-Do's   View, Add, Edit, Delete

Assign users

Global - Can see all To-Do's

Change orders   View, Add, Edit, Delete

Selections   View, Add, Edit, Delete

Specifications   View, Add, Edit, Delete

Warranty   View, Add, Edit, Delete

Time clock   View, Add, Edit, Delete

View other user time sheets

Adjust other user time sheets

Review and Approve user shifts

Client Updates	View, Add, Edit, Delete

Files

Documents	View, Add, Edit, Delete

☐ Access Sub/Vendor and Client Uploads

☐ Signature Requests on PDFs

Photos	View, Add, Edit, Delete

Videos	View, Add, Edit, Delete

Messaging

RFIs	View, Add, Edit, Delete

Surveys	View, Add, Edit, Delete

Messages	View, Add, Edit, Delete

☐ Global - Can view all messages for all users

Chat	View, Add, Edit, Delete

Financial

Bids	View, Add, Edit, Delete

Estimate	View, Add, Edit, Delete

Takeoffs

Estimate general items   View, Add, Edit, Delete

Job costing budget   View, Add, Edit, Delete

Bills/Purchase orders   View, Add, Edit, Delete

Mark Bill/PO as paid

This permission will turn on multi-factor authentication for this user if enabled. Learn More

No Price Limit

Cost inbox   View, Add, Edit, Delete

Global - Can see all Receipts

Invoices   View, Add, Edit, Delete

Create/Edit Credit memos

Payroll   View, Add, Edit, Delete

Cost and/or price viewing

Job Info

Change Orders

Selections

Bills/POs

Time Clock

Estimate General Items

Pay online

View Online Payment Report

Administrative

Job info   View, Add, Edit, Delete

Access Presale Jobs

Access Open Jobs

Access Warranty Jobs

Access Closed Jobs

View Owner Site

Builders Risk Insurance

Subs/Vendors

View, Add, Edit, Delete

Client contacts

View, Add, Edit, Delete

View all

Export To Excel

Admin

View, Add, Edit, Delete

View Reports

Manage Subscription Payments

Manage accounts receivable

Assigned users

2 users

Jonn Gagnon

Active

Tyler Gagnon

Active