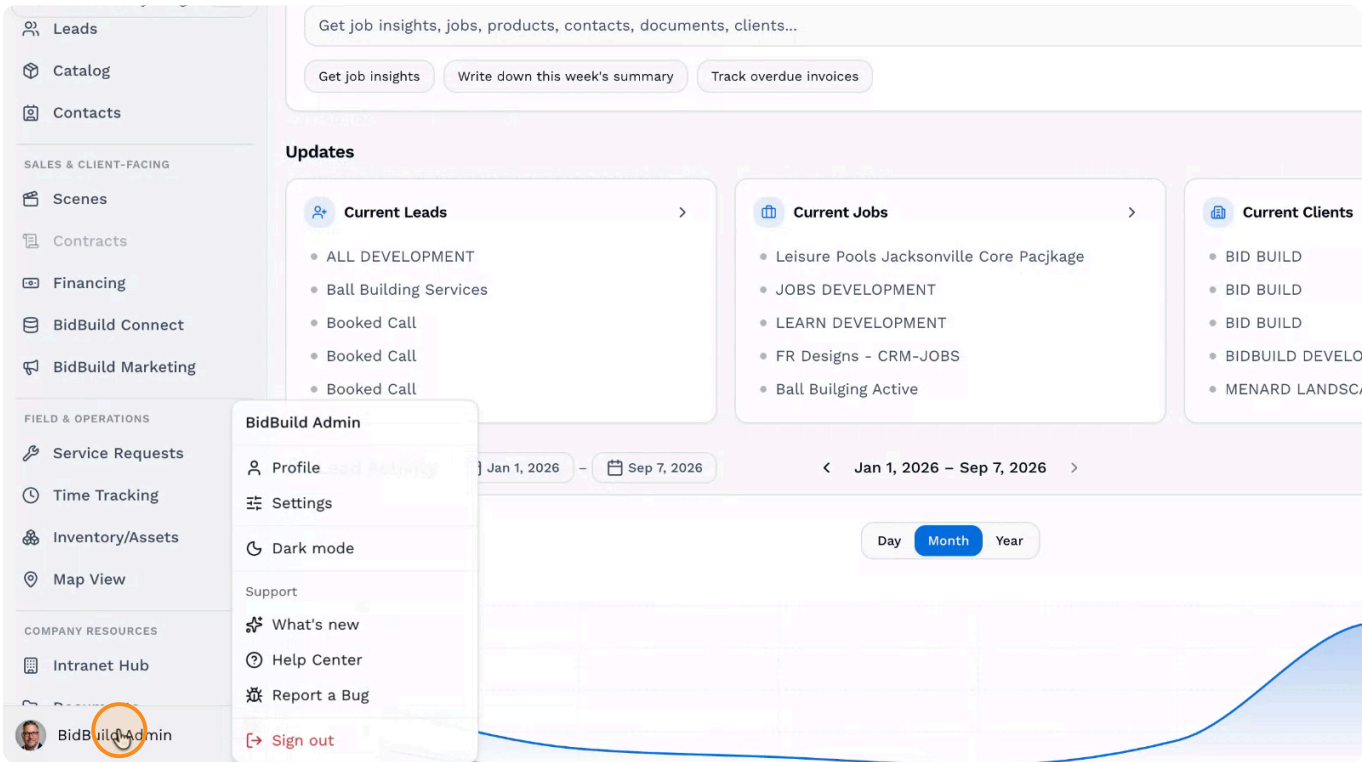


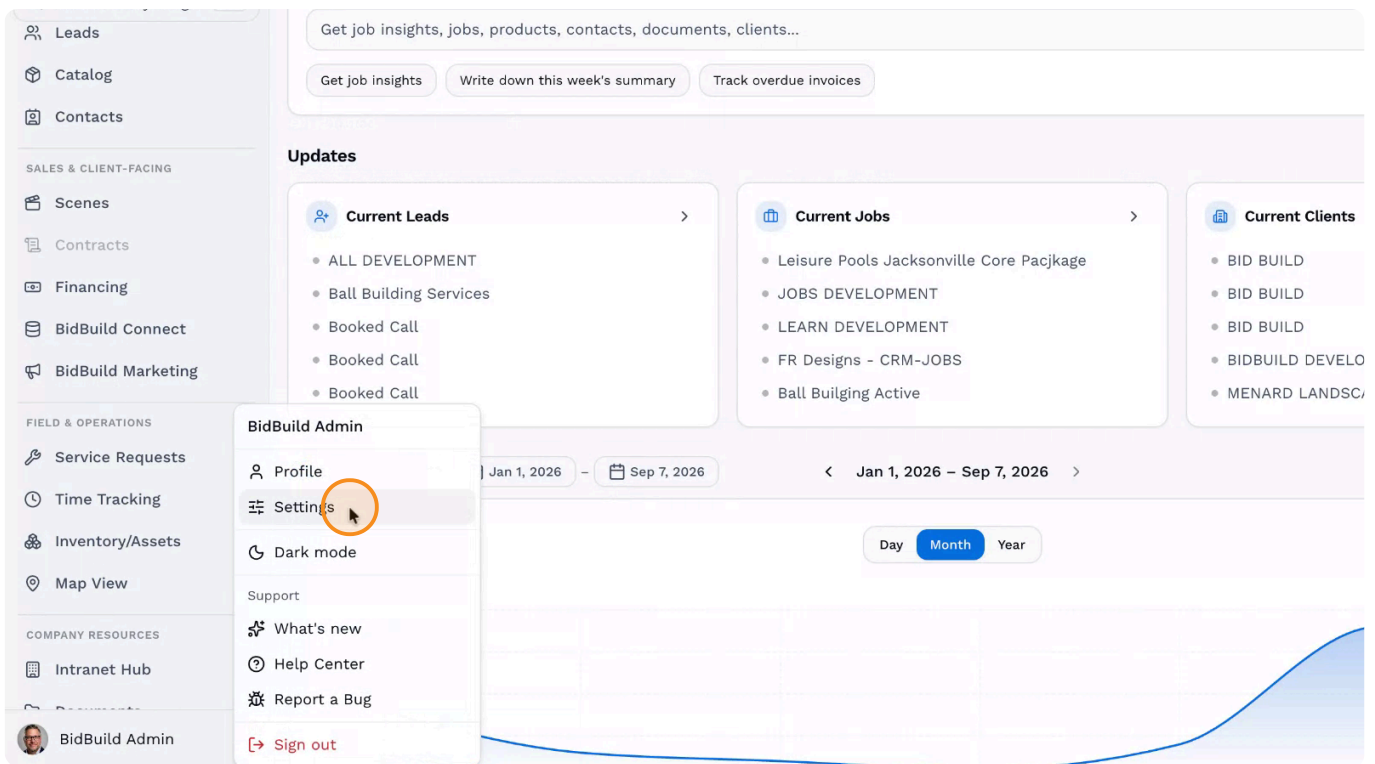
Managing Roles and Permissions in the Application

This document explains how to access the roles and permissions area, create or modify roles, and adjust permissions both at the role level and for individual users.

Step 1: Open Your Profile Settings

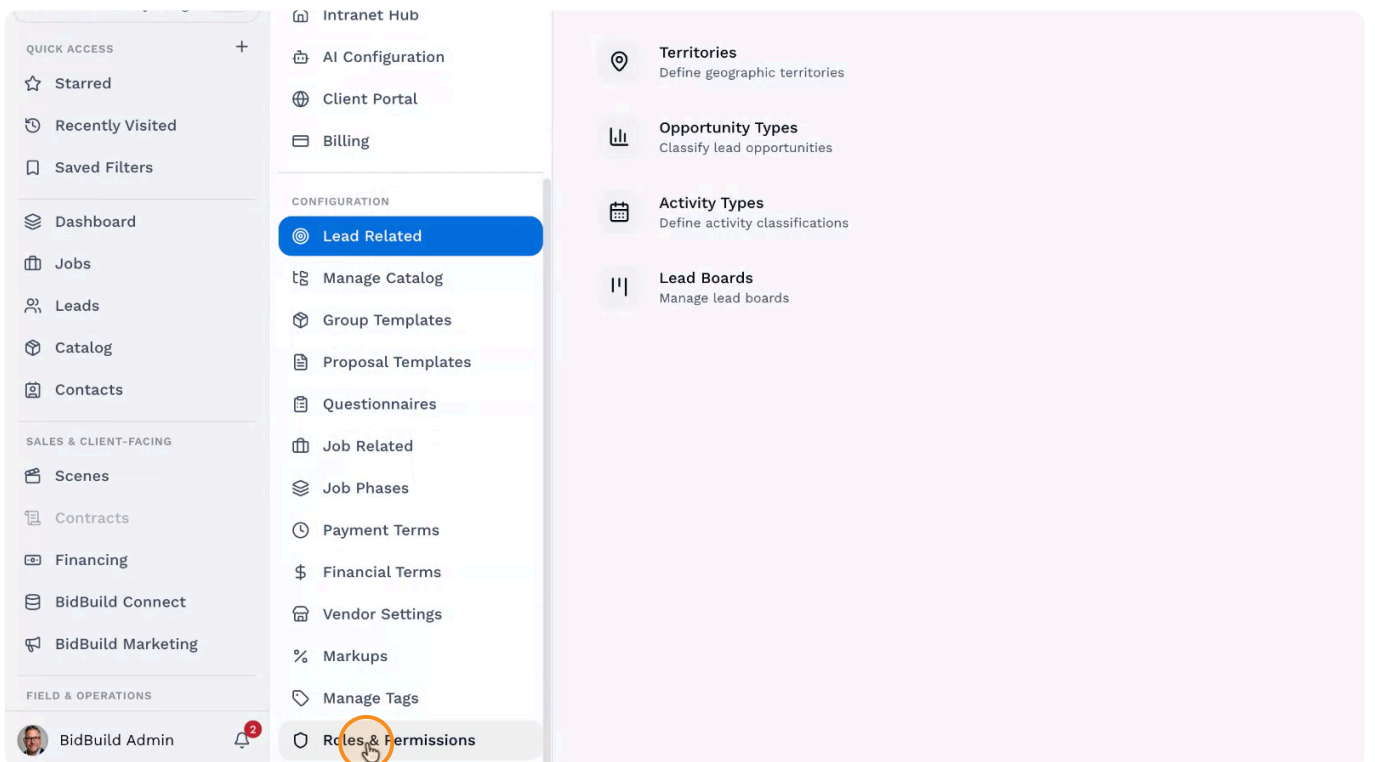
Go to your profile and open the settings page.





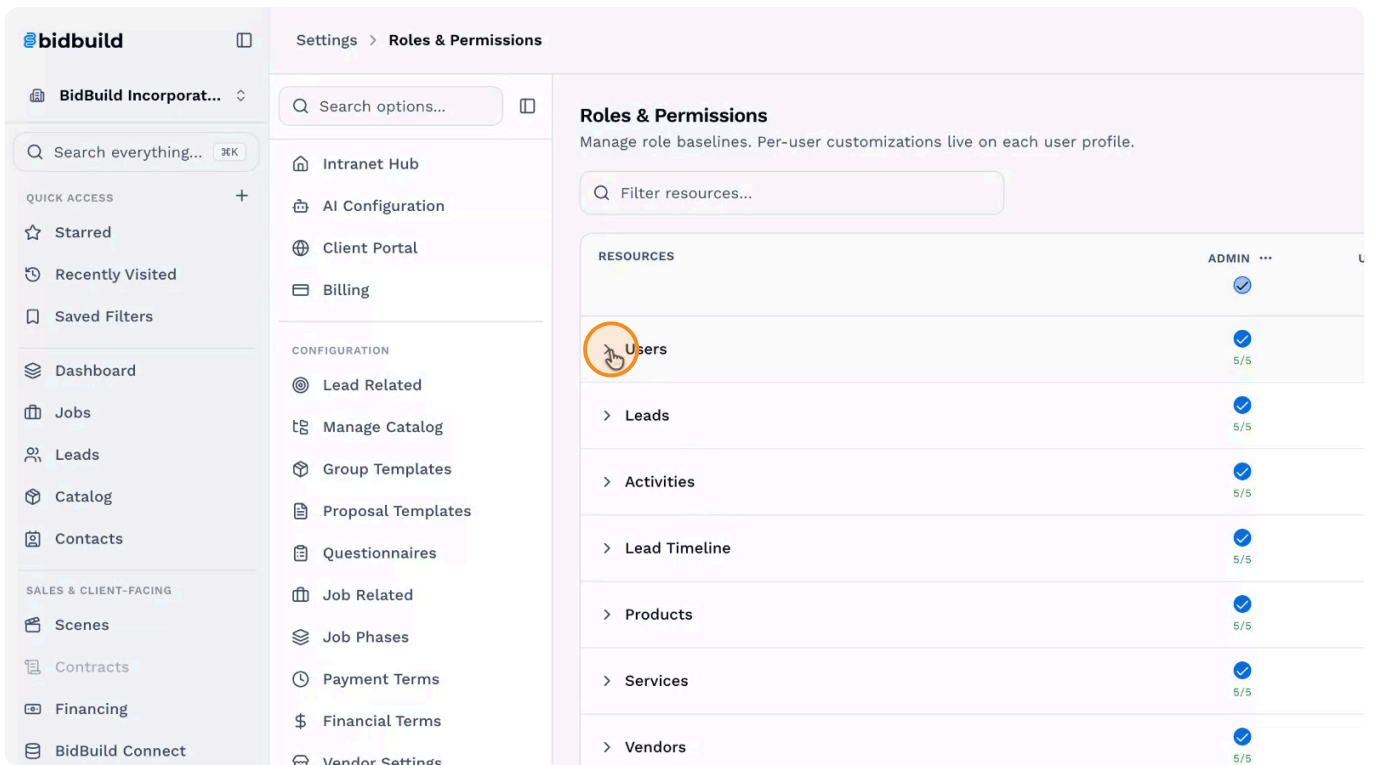
Step 2: Navigate to the Roles and Permissions Section

Scroll to the bottom of the settings page and select the **Roles** option, then open **Roles and Permissions**.



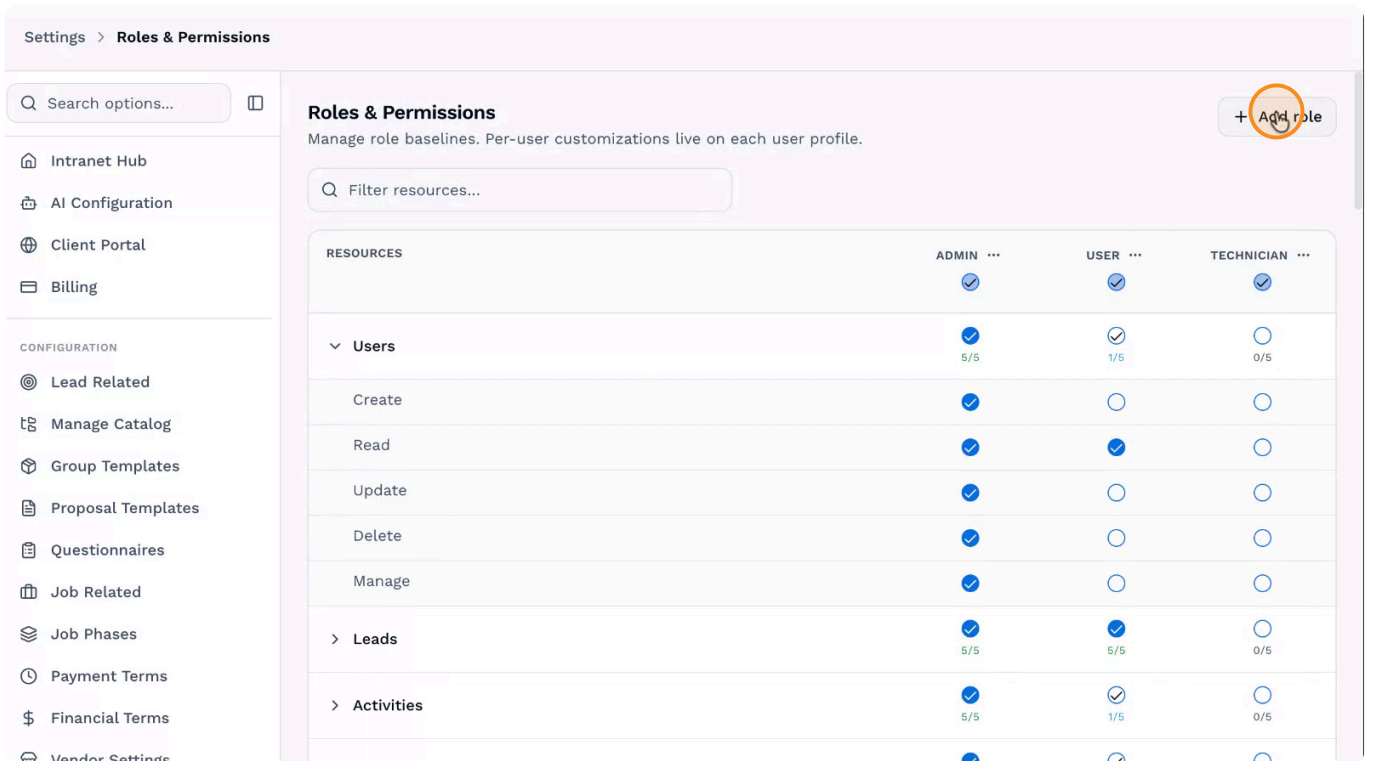
Step 3: Review and Adjust Role Capabilities

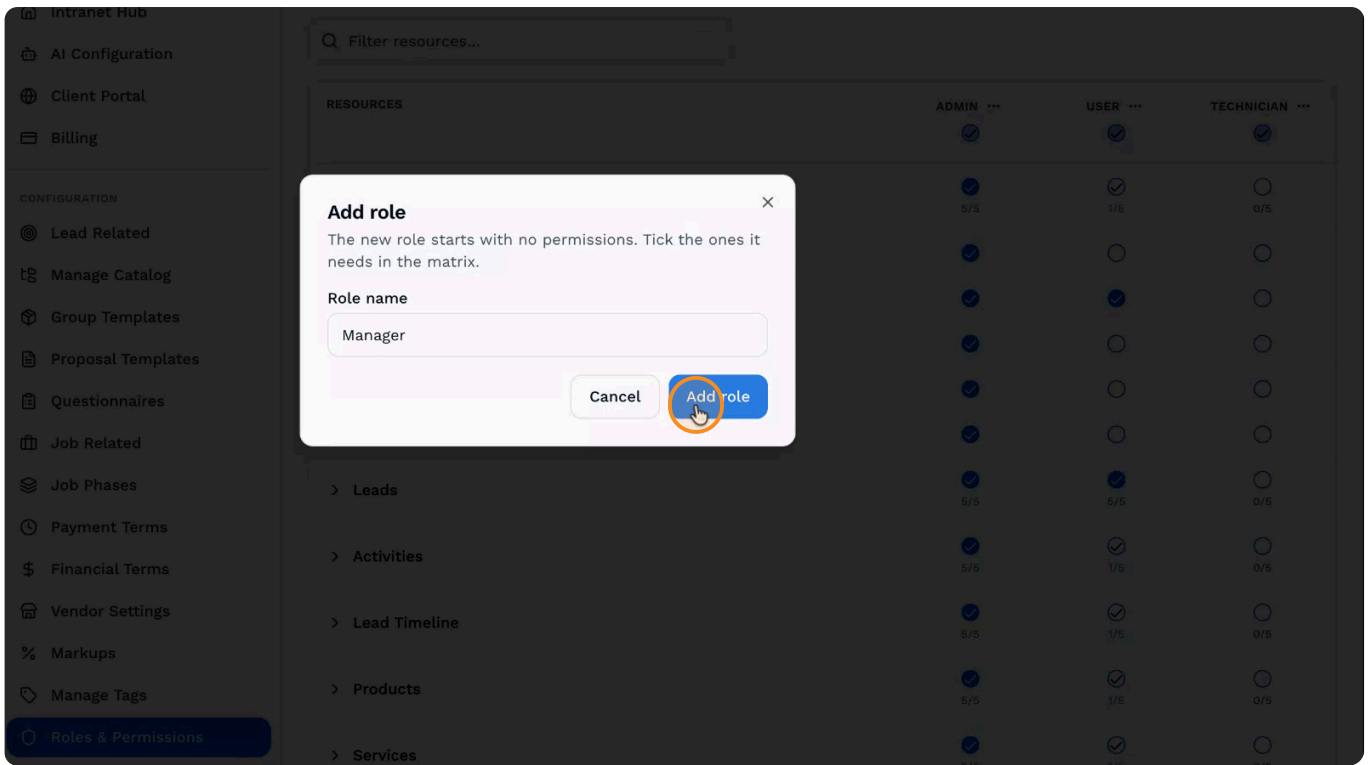
In the **Roles and Permissions** section, expand an existing role to view its capabilities. You can configure permissions such as **create**, **read**, **update**, **delete**, or **manage** across different categories and adjust these settings as needed.



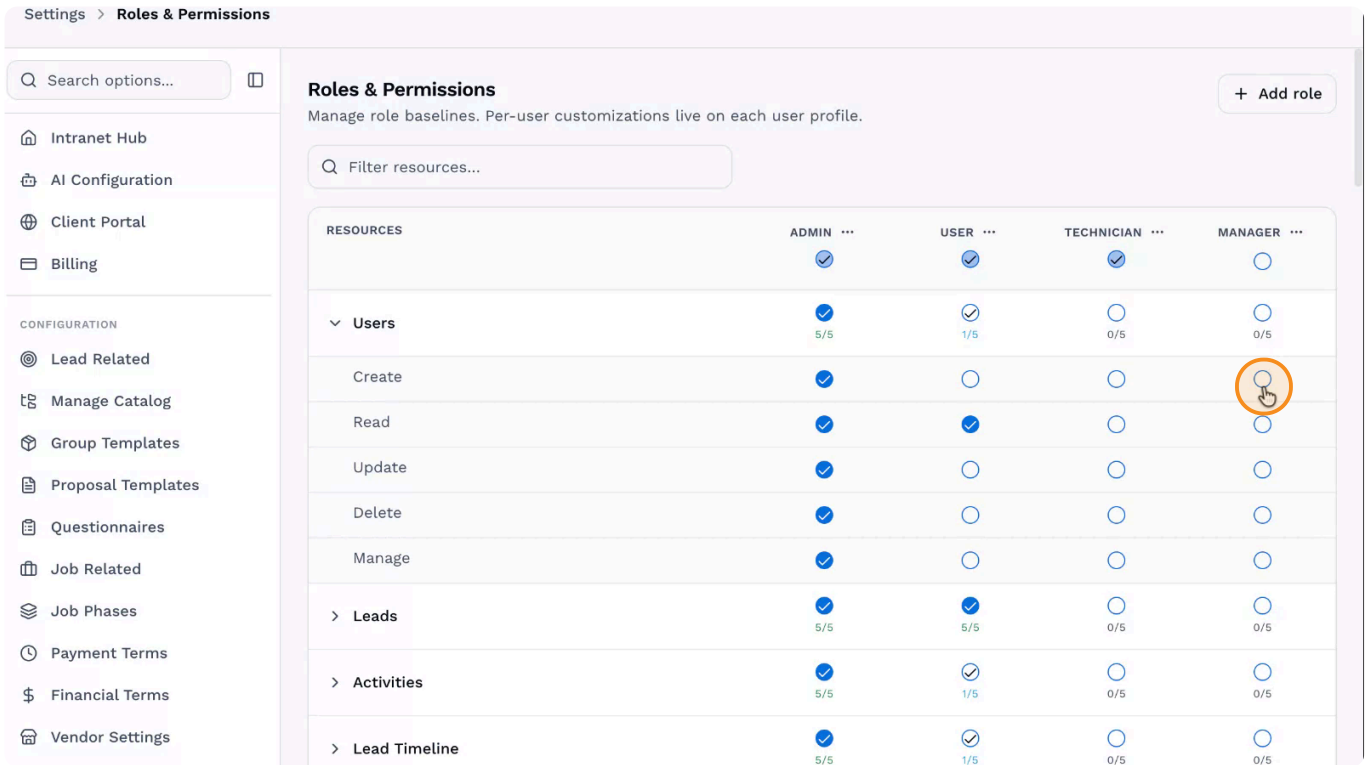
Step 4: Add and Configure a New Role

Add a new role, then go through each permissions section for that role.





Review each section, choose the appropriate **add** or other permission options, configure all required categories, and then save your changes to create the new role.



Settings > Roles & Permissions

Search options...

Intranet Hub

AI Configuration

Client Portal

Billing

CONFIGURATION

Lead Related

Manage Catalog

Group Templates

Proposal Templates

Questionnaires

Job Related

Job Phases

Payment Terms

Financial Terms

Vendor Settings

Roles & Permissions

Manage role baselines. Per-user customizations live on each user profile.

Filter resources...

+ Add role

4 UNSAVED

Save Changes

RESOURCES	ADMIN	USER	TECHNICIAN	MANAGER
Users	5/5	1/5	0/5	4/5
Create	✓	○	○	✓
Read	✓	✓	○	✓
Update	✓	○	○	✓
Delete	✓	○	○	✓
Manage	✓	○	○	○
Leads	5/5	5/5	0/5	0/5
Activities	5/5	1/5	0/5	0/5

Step 5: Manually Adjust Individual User Permissions

To change permissions for a specific user, navigate to **Contacts** and then **Users**. Open the **Permissions** area for the selected user and manually update their permissions as required.

QUICK ACCESS

Starred

Recently Visited

Saved Filters

Dashboard

Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

Scenes

Contracts

Financing

BidBuild Connect

BidBuild Marketing

FIELD & OPERATIONS

BidBuild Admin

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Contacts

Clients

Users

Vendors

Financial Terms

Vendor Settings

Markups

Manage Tags

Roles & Permissions

Filter resources...

RESOURCES	ADMIN	USER	TECHNICIAN
Users	5/5	1/5	0/5
Create	✓	○	○
Read	✓	✓	○
Update	✓	○	○
Delete	✓	○	○
Manage	✓	○	○
Leads	5/5	5/5	0/5
Activities	5/5	1/5	0/5
Lead Timeline	5/5	1/5	0/5
Products	5/5	1/5	0/5
Services	5/5	1/5	0/5

