



BIDBUILD TRAINING · SETTINGS

Settings Overview [Admin](#) [and General](#)

A companion to the video walkthrough. Every screen in the Settings menu, what it controls, and which of them reach your clients.

OVERVIEW

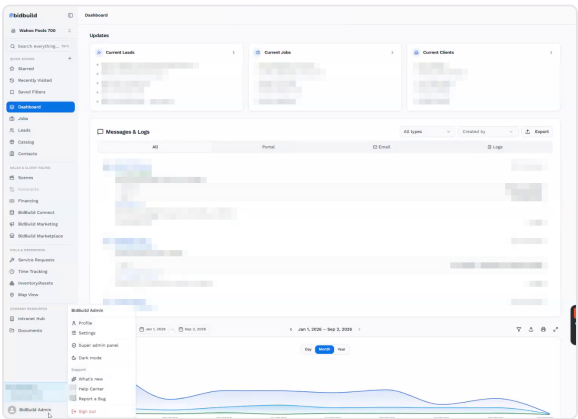
Two halves of one Settings menu

Settings is split in two. The upper group — Company — is administrative and only an administrator can open it. The lower group — Configuration — holds the lists the rest of the app draws from, and most users can reach it.

GROUP	WHAT LIVES THERE	WHO
Company	Basic Information, Company Logo, Business Type, Company Details, Integrations, Intranet Hub, AI Configuration, Client Portal	Administrators
Configuration	Lead Related, Manage Catalog, Group and Proposal Templates, Questionnaires, Job Related, Job Phases, Payment and Financial Terms, Vendor Settings, Markups, Manage Tags, Roles and Permissions	Most users

START HERE **Open Settings**

Select your profile in the lower left corner, then choose **Settings**.



PROFILE MENU · SETTINGS

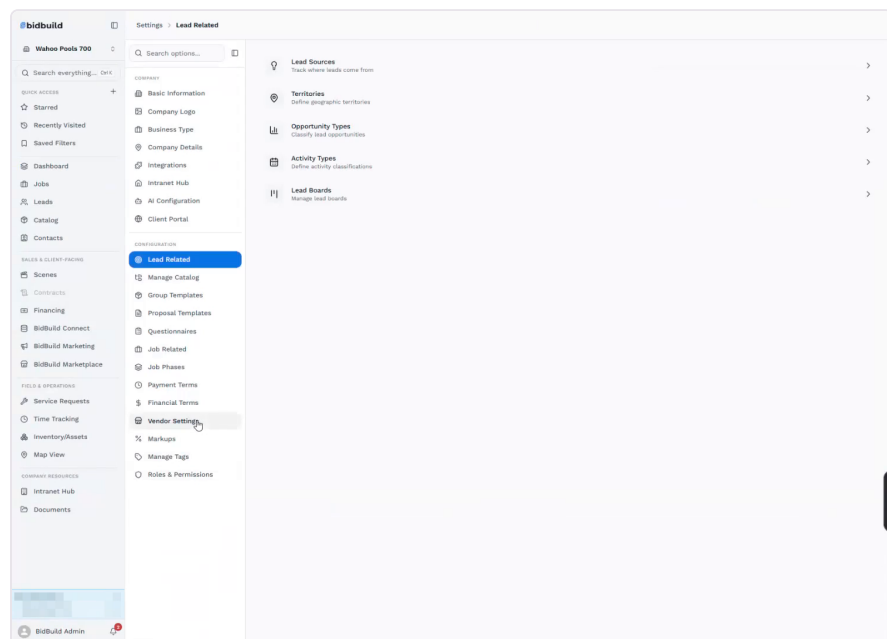
OVERVIEW

The Settings menu

Company settings sit at the top of the left column; Configuration sits below it.

STEP 02 The menu itself

Selecting any entry opens that screen on the right. The menu stays visible, so you can move between settings without going back.



SETTINGS · MENU

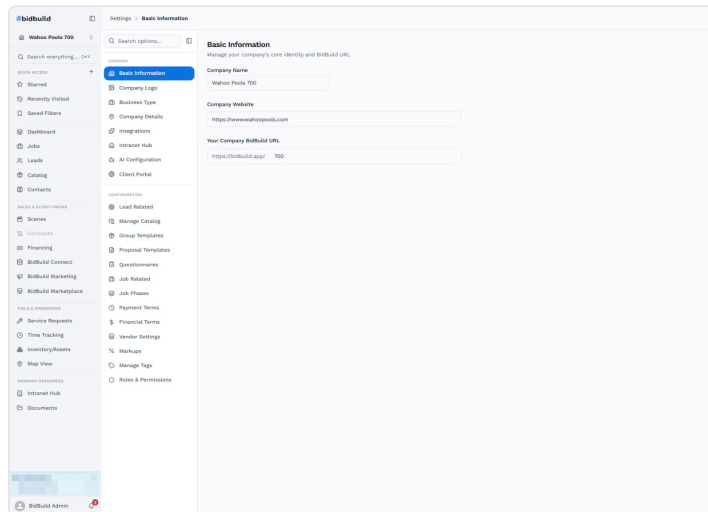
PART ONE

Your company record

Name, website, logos, and the details that print on client-facing documents.

STEP 01 Basic Information

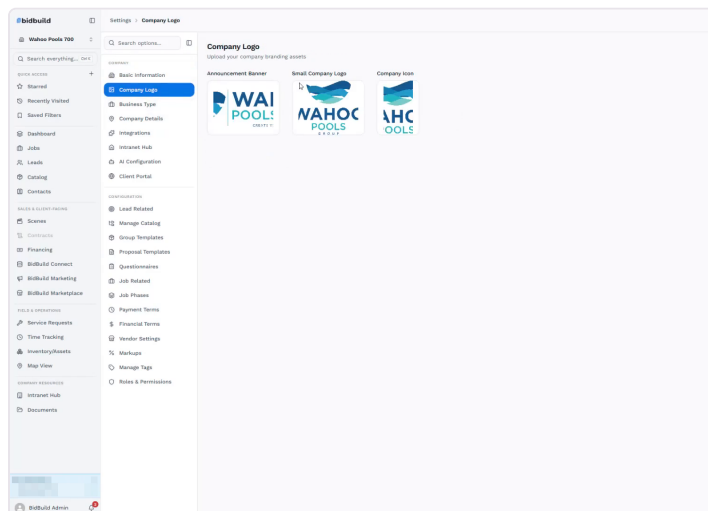
Change the **company name**, the **company website**, and your **BidBuild URL**.



SETTINGS · BASIC INFORMATION

STEP 02 Company Logo

Holds your **announcement banner**, the **small company logo**, and the **company icon** — the marks that appear across the app and on documents.



SETTINGS · COMPANY LOGO

PART ONE

Company details and printouts

STEP 03 Business Type and Company Details

The rest of your company information lives here. Two checkboxes on this screen control whether the **full address information is included on printouts** — that setting applies to your proposals, so change it deliberately.

The screenshot displays the 'Company Details' settings page in the bidbuild interface. The left sidebar contains a navigation menu with options like 'Dashboard', 'Jobs', 'Leads', 'Contacting', 'Contacts', 'Screens', 'Contracts', 'Financing', 'BidBuild Connect', 'BidBuild Marketplace', 'Tools & Integrations', 'Service Requests', 'Time Tracking', 'Inventory/Assets', 'Map View', 'Internet Hub', and 'Documents'. The main content area is titled 'Company Details' and includes a search bar and a list of settings categories. The 'Company Details' category is selected, showing fields for 'Registered Company Name', 'Company Email', 'Street Address', 'City', 'State', 'Zip Code', 'Country', 'Phone Number', 'Additional Phone Number', 'Fax', and 'Custom printout field'. Two checkboxes are highlighted: 'Include all address information on Printout' and 'Include all phone numbers on printout', both of which are currently checked. The 'Custom printout field' section is also visible at the bottom.

SETTINGS · COMPANY DETAILS

THESE SETTINGS REACH YOUR CLIENTS

Logos, company details, and the printout checkboxes all show up on proposals. Anything you change here changes what a client sees on their next document.

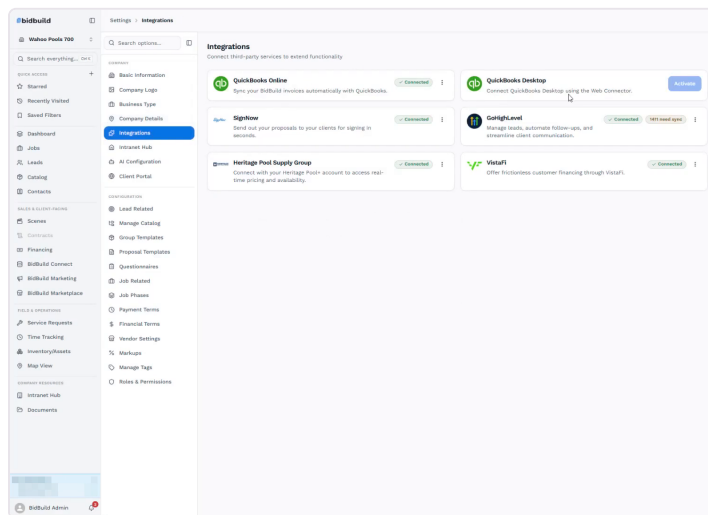
PART TWO

Connect the outside world

Everything BidBuild talks to is switched on from one screen.

STEP 01 Integrations

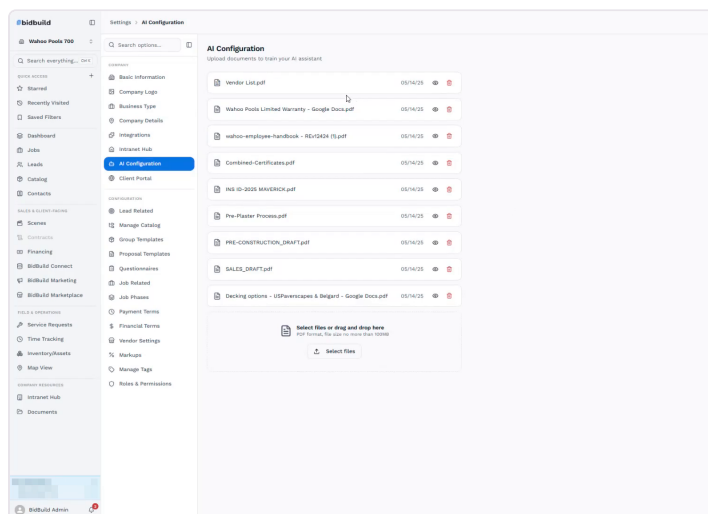
Connect **QuickBooks Online** or **QuickBooks Desktop**, **SignNow** for e-signatures, your **marketing platform**, **Heritage Pool Supply**, and **Vestify**.



SETTINGS · INTEGRATIONS

STEP 02 AI Configuration

Every AI feature inside BidBuild is configured here. **Intranet Hub** sits in the same group and has its own guide.



SETTINGS · AI CONFIGURATION

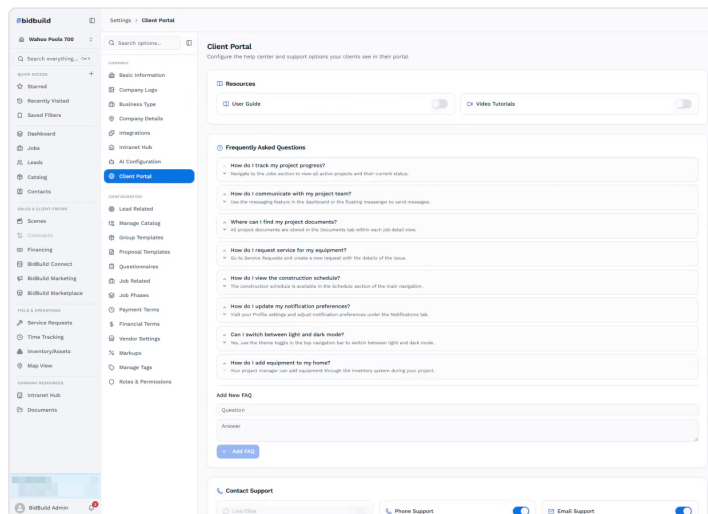
PART THREE

What your clients see

The portal is your clients' side of the job. This screen controls what it contains.

STEP 01 Resource center

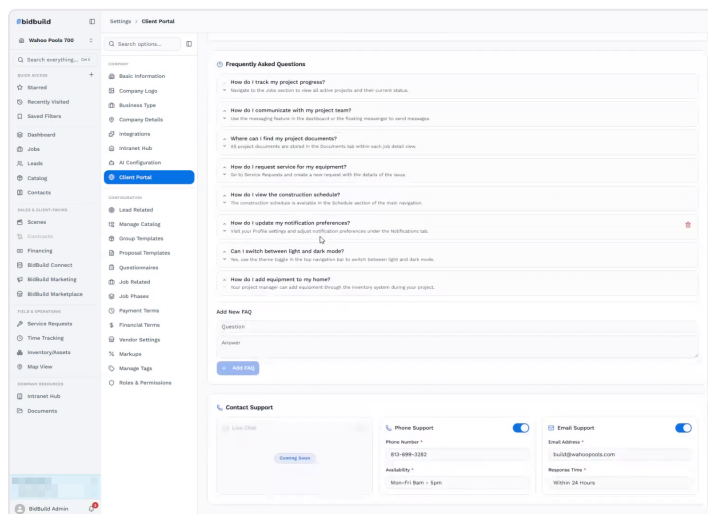
Publish **user guides** and **video tutorials** so clients can help themselves.



SETTINGS · CLIENT PORTAL

STEP 02 Frequently asked questions

Add, edit, and reorder the questions clients ask most.



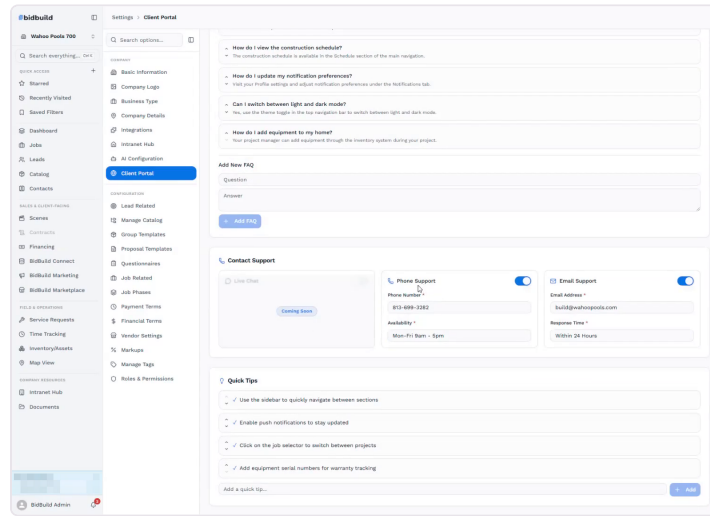
CLIENT PORTAL · FAQs

PART THREE

Support details and tips

STEP 03 Support contact and quick tips

Publish a **support phone number** and a **support email** inside the portal, and add **quick tips** for your clients.



CLIENT PORTAL · SUPPORT

FILL IT IN ONCE

An empty portal makes clients phone your project managers. A resource center, an FAQ, and a support address absorb most of those calls.

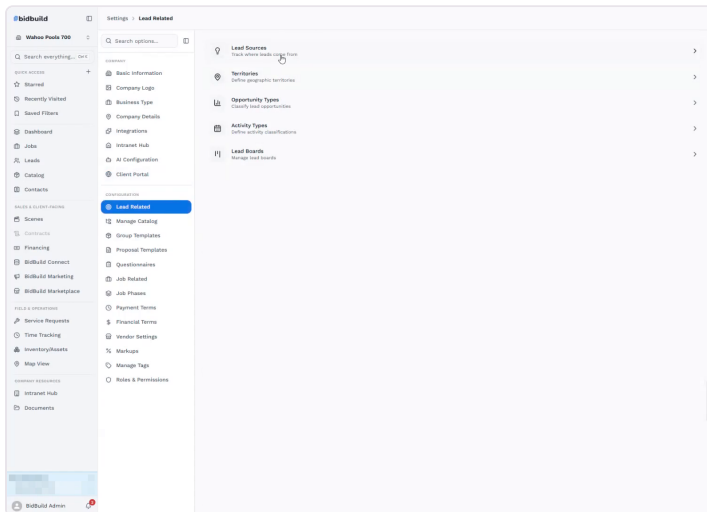
PART FOUR

The lists your pipeline draws from

Lead sources, territories, opportunity types, activity types, and lead boards.

STEP 01 Lead Sources

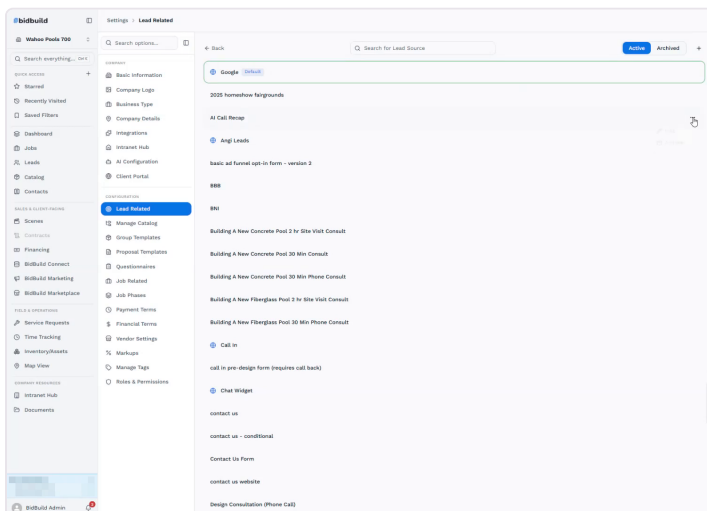
Every source available in the system. Switch between **Active** and **Archived**, or select **Add** to create a new one.



LEAD RELATED · LEAD SOURCES

STEP 02 Edit or archive

Use the **three dots** on the right of a row to edit it or archive it. Archiving keeps history intact; deleting a source in use would not.



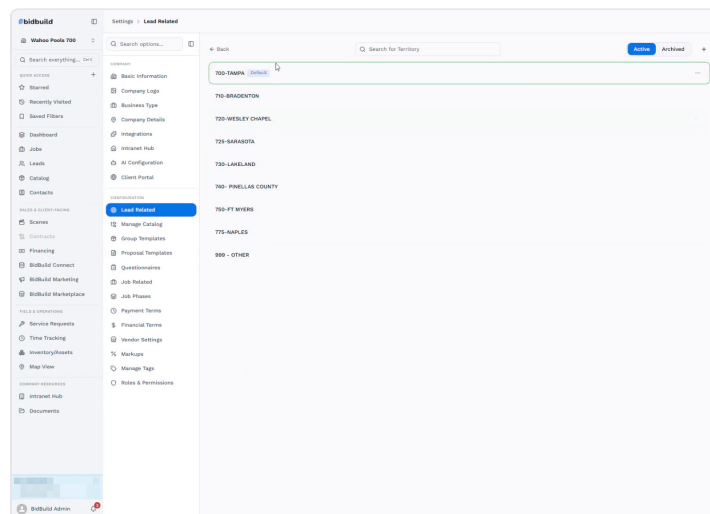
LEAD SOURCES · ROW MENU

PART FOUR

Territories and types

STEP 03 Territories, opportunity types, activity types, lead boards

Territories hold the areas you work in, if you track your business that way. The same screen holds **Opportunity Types**, **Activity Types**, and **Lead Boards**.



LEAD RELATED · TERRITORIES

MARKETING PLATFORM WINS

If a marketing platform is connected, boards are controlled in that tool — changing them in BidBuild will not stick.

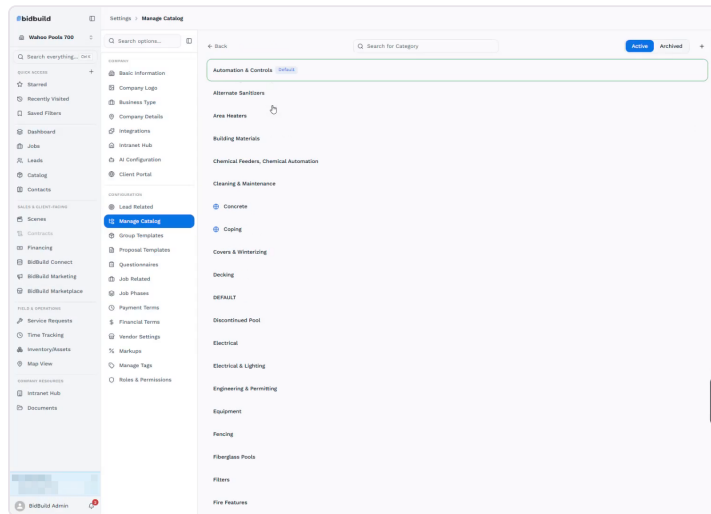
PART FIVE

Catalog, groups, and proposals

What your proposals are built from.

STEP 01 Manage Catalog

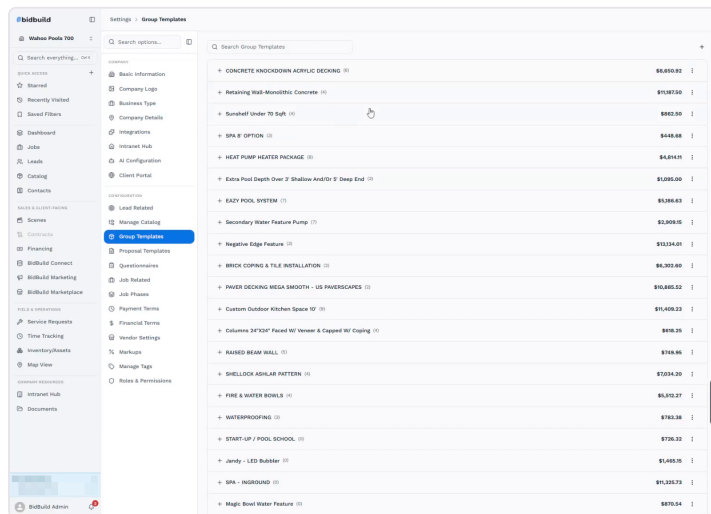
Your **measurement types**, **cost codes**, and **categories and subcategories** — the structure every product hangs on.



CONFIGURATION · MANAGE CATALOG

STEP 02 Group Templates

Open a template to see the products inside it. The three dots let you **edit**, **duplicate**, or **delete** it.



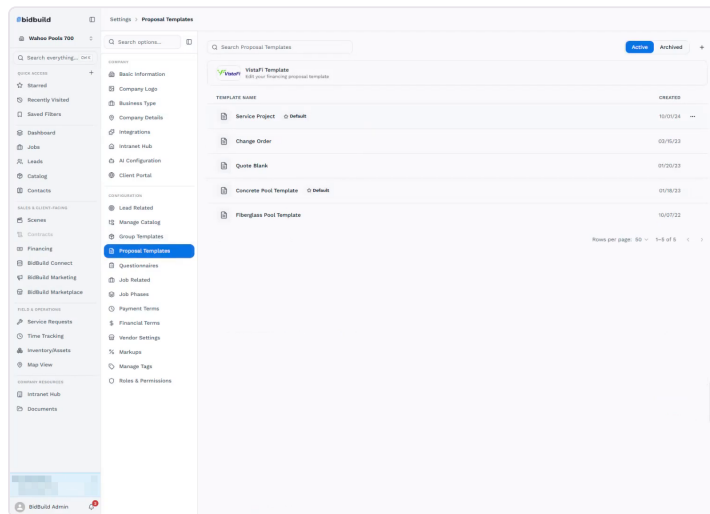
CONFIGURATION · GROUP TEMPLATES

PART FIVE

Proposal templates and questionnaires

STEP 03 Proposal Templates

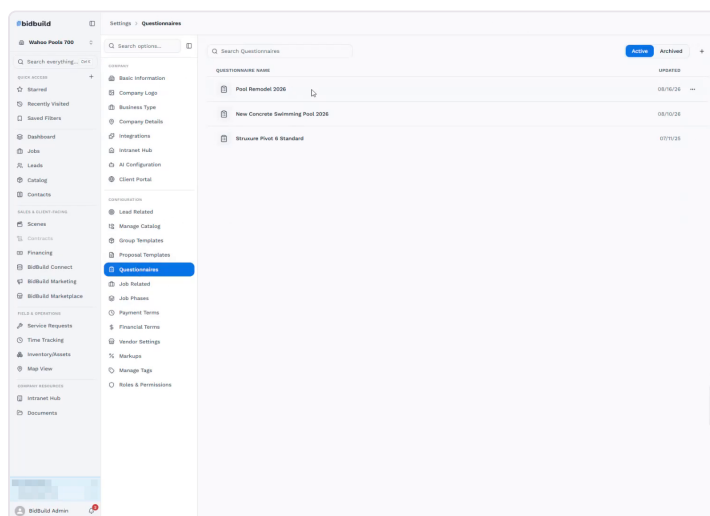
Add and change the templates your proposals are built from. Three dots → **Edit** changes how a proposal looks to the client.



CONFIGURATION · PROPOSAL TEMPLATES

STEP 04 Questionnaires

Every questionnaire in the system. Add new, edit, duplicate, or archive.



CONFIGURATION · QUESTIONNAIRES

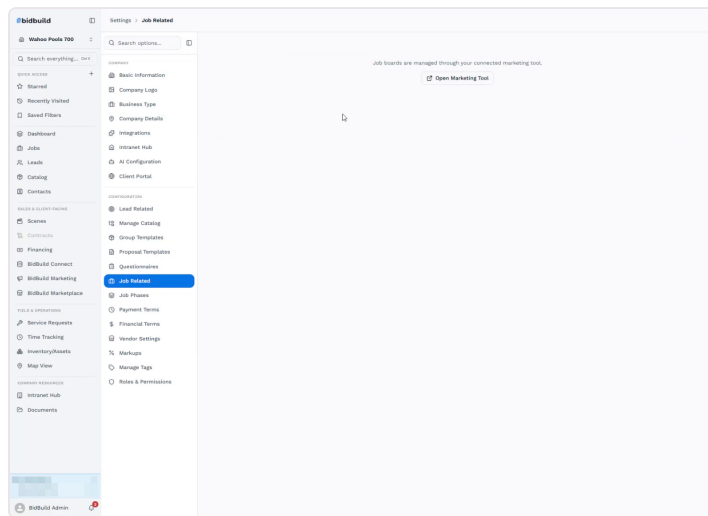
PART SIX

Job settings

Boards, types, inspections, divisions, and phases.

STEP 01 Job Related

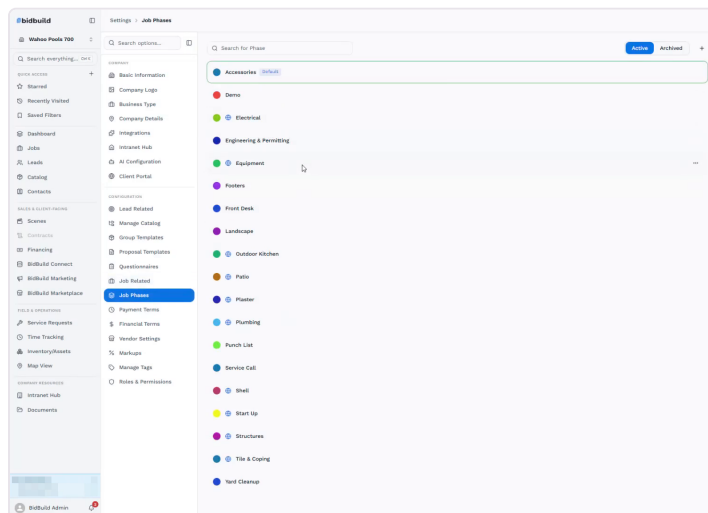
Holds **job boards** — also controlled by your marketing tool — along with **job types**, **inspection types**, and **divisions**.



CONFIGURATION · JOB RELATED

STEP 02 Job Phases

Every phase you use in the catalog and on your jobs, in order.



CONFIGURATION · JOB PHASES

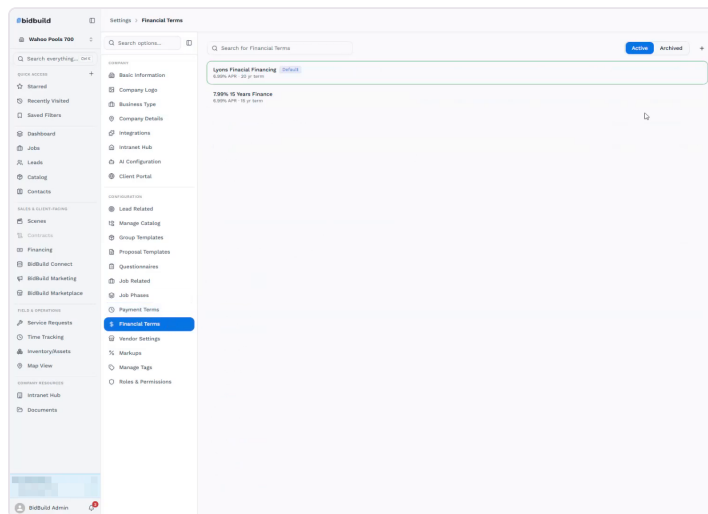
PART SEVEN

Terms and vendors

Payment terms, financial terms, and how vendors are grouped.

STEP 01 Payment and Financial Terms

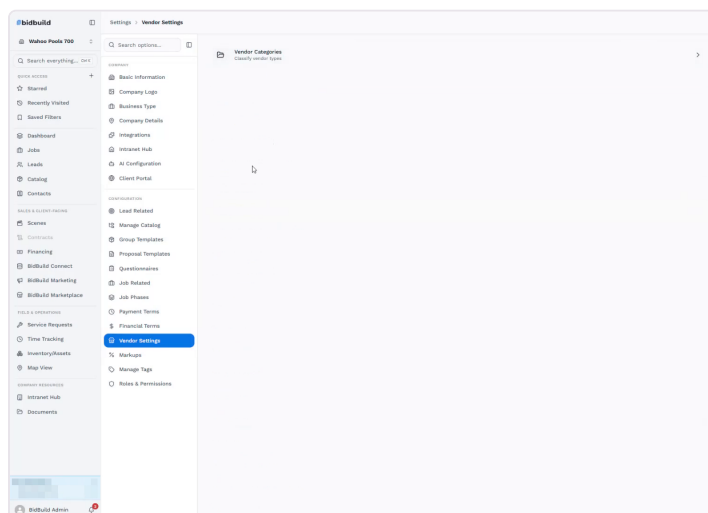
Payment Terms holds the terms you offer. **Financial Terms** sits beside it — lender programs with their rate and length. Use the plus symbol to add one.



CONFIGURATION · FINANCIAL TERMS

STEP 02 Vendor Settings

Vendor categories, so you can view your vendors by category.



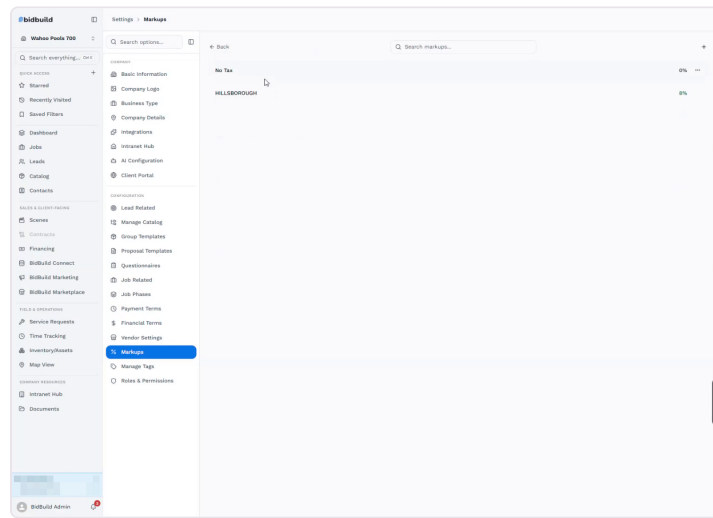
CONFIGURATION · VENDOR SETTINGS

PART SEVEN

Markups

STEP 03 The four markup types

Proposal type, county, agent level, and manager level markups. The plus symbol adds one.



CONFIGURATION · MARKUPS

STEP 04 Payout steps

Inside the sales and manager markups, give it a **name** and a **rate**, then add the **steps** for when those payouts happen. Those payouts then show up inside the job budgets.

A screenshot of the 'Create Markup' form. It has a title bar with a close button. The form contains: a 'Name *' field with a placeholder 'Enter name'; a 'Markup rate *' field with a value of '0' and a '%' symbol; a section titled 'Payout Schedule for Manager and Sales markups' with a note: 'Set a payout schedule for Manager and Sales markups by adding steps that total 100%. The markup rates will be selected when converting the proposal to a job.'; an '+ Add step' button; a message 'No payout steps configured'; and 'Cancel' and 'Create' buttons at the bottom right.

MARKUPS · PAYOUT STEPS

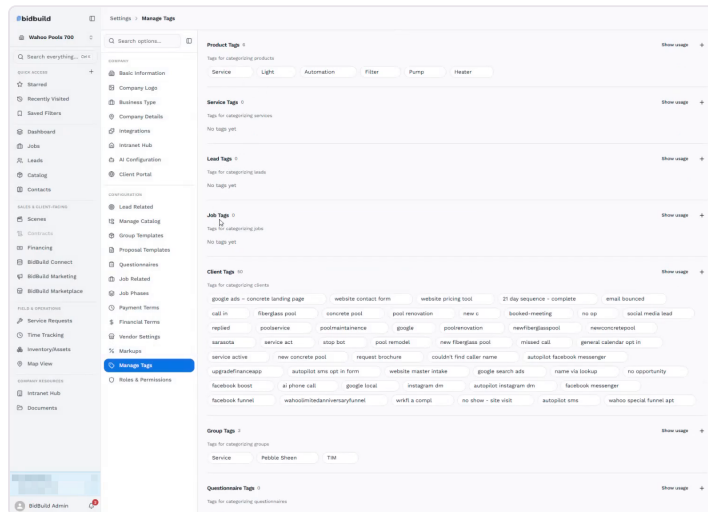
PART EIGHT

Tags and permissions

How records are labelled, and who is allowed to do what.

STEP 01 Manage Tags

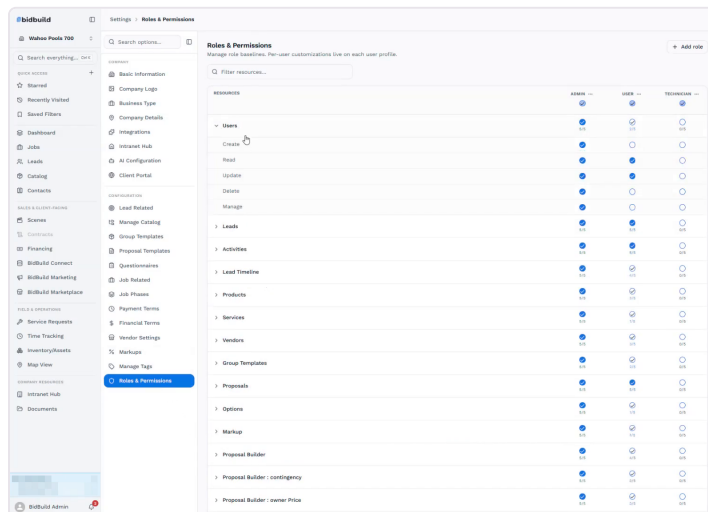
Product, service, lead, job, client, group, and questionnaire tags — all managed from one screen.



CONFIGURATION · MANAGE TAGS

STEP 02 Roles and Permissions

Build roles and set exactly what each role is allowed to do.



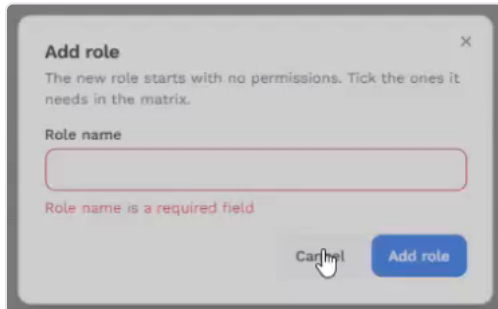
CONFIGURATION · ROLES AND PERMISSIONS

PART EIGHT

Add a role

STEP 03 New role

Add a role, give it a name, set its permissions, and it becomes selectable for your users.



ROLES · ADD ROLE

PERMISSIONS ARE THE SAFEST LEVER

Most "who changed this?" problems are permission problems. Give each role the smallest set of rights that lets the job get done.

REFERENCE

Quick reference

WHERE THINGS LIVE

YOU WANT TO

GO TO

Change the company name or URL

Company → Basic Information

Swap a logo or banner

Company → Company Logo

Control what prints on proposals

Company → Company Details

Connect QuickBooks or SignNow

Company → Integrations

Change what clients see

Company → Client Portal

Add a lead source or territory

Configuration → Lead Related

Change cost codes or categories

Configuration → Manage Catalog

Change how a proposal looks

Configuration → Proposal Templates

Add a job phase

Configuration → Job Phases

Change a markup or payout step

Configuration → Markups

Give someone more access

Configuration → Roles and Permissions

THINGS THAT TRIP PEOPLE UP

- **Company settings are admin-only.** If you cannot see the top group, that is your role, not a bug.
- **Archive, do not delete.** Archiving a source or template keeps historical records readable.
- **Boards follow your marketing tool.** With an integration connected, lead and job boards are changed there.
- **Markups drive proposal pricing.** Changing a county or agent markup changes every proposal written afterwards.
- **Payout steps land in job budgets.** Set them once, deliberately.