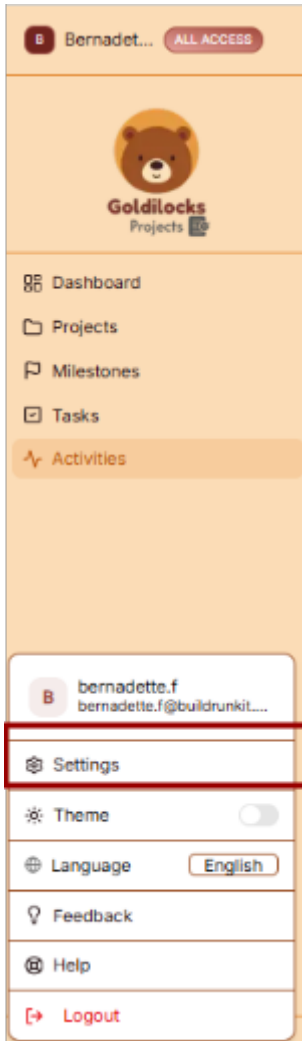


# User Profile & Settings

## User Profile & Settings



# Settings

Manage your workspace and data settings.

[User Settings](#) [Workspace](#) [Billing & Plans](#) [Import/Export](#)

### Account Information

Manage your personal information Edit

Display Name	Phone Number
Bernadette.F	-

Member Since  
Sep 16, 2025

### Email Address

Update your email address. A confirmation link will be sent to the new address. Edit

Email  
bernadette.f@buildrunkit.com

### Change Password

Choose a strong password with at least 8 characters.

Current Password

New Password

Confirm New Password

Change Password

The Settings area allows you to manage your personal information, account security, and how the interface appears to you.

## Managing Personal Information

Under the User Profile tab, you can view and update your primary account details:

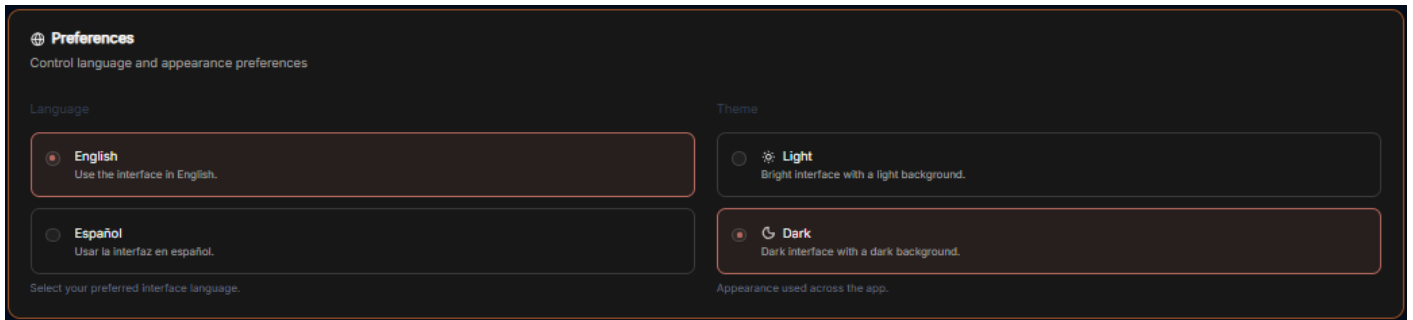
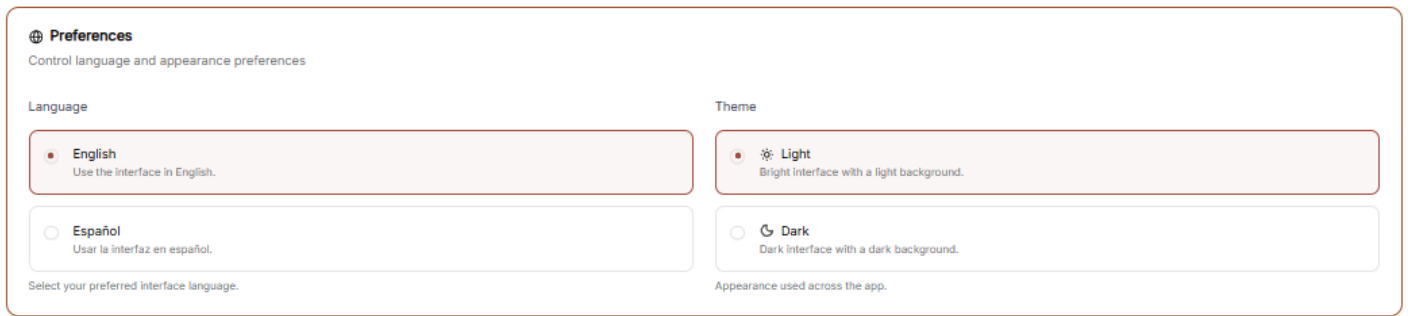
- **User Profile:** This section displays your First Name, Last Name, and Email Address. Enter your details into the text fields to keep your account information current.
- **Update Profile:** After making changes to your name or email, click the brown Update Profile button at the bottom of the form to save your details.

## Account Security

You can update your login credentials at any time in the Security section:

- **Current Password:** Enter your existing password for verification.
- **New Password:** Create a new password in the provided field.
- **Confirm New Password:** Re-enter the new password to ensure it matches.
- **Update Password:** Click the brown Update Password button to finalize your new credentials.

# Interface Preferences



You can customize the look of your workspace through the General Settings menu.

Theme Selection Adjust the visual appearance of the application to match your working environment:

- Dark Mode: Use the toggle switch to enable or disable the high-contrast dark theme.
  - Light Theme: When toggled off, the interface uses a bright background.
  - Dark Theme: When toggled on, the interface uses a dark background, ideal for low-light environments.

# Workspace Management

# Settings

Manage your workspace and data settings.

User Settings Workspace Billing & Plans Import/Export

**Bernadette.F's Updated Workspace**  
Workspace owner: Bernadette.F  
Created on Sep 16, 2025

Edit Workspace Bernadette.F's Updated Workspace ALL ACCESS

**All Workspaces**  
Manage your workspaces and switch between them as needed. [+ New Workspace](#)

Workspace Name	Created At	
Official BuildRunKit Employee Workspace	Oct 7, 2025	...
Bernadette.F's Updated Workspace	Sep 16, 2025	...
Training & Demo	Feb 12, 2026	...

Rows per page: 10 Page 1 of 1

User Management Manage Invitations

**Manage Workspace Members**  
Manage users and the current workspace. [Add a Member](#)

Search users

Name	Email	Role	Created At	
Bernadette.F	bernadette.f@bulldrunkit.com	Owner	Sep 16, 2025	...

Rows per page: 10 Page 1 of 1

The Workspaces settings allow you to manage the different environments you belong to and see your current access levels.

## All Workspaces

This tab provides an overview of the workspace your account is currently associated with.

- **Workspace Details:** You can see the name of the workspace (e.g., "Goldilocks Projects") and its current subscription plan (e.g., "Free").
- **Actions:** By clicking the three dots (actions menu) next to the workspace, you can manage your involvement in that environment:
  - **Exit:** Select this to remove yourself from the workspace.

## Manage Workspace Members

Control who has access to your workspace in this section.

- Member List: View all users, their email addresses, and their assigned roles.
  - User: Displays the name of the member (e.g., "Bernadette F").
  - Email: Displays the email address associated with the member.
  - Role: Shows the permissions level of the user (e.g., "Owner").
- Invite Members: Click the brown "+ Invite member" button at the top right to add a new person to the team via email.
- Removing Users: To revoke access, click the three dots (actions menu) next to a member's name and select Remove user.

# Billing & Plans

## Settings

Manage your workspace and data settings.

[User Settings](#) [Workspace](#) [Billing & Plans](#) [Import/Export](#)

Current Plan  
**All access**  
\$ /

[Change Plan](#) [Manage Subscription](#)

**Subscription Limits**  
Overview of your current subscription limits and usage.

[Team Seats](#) 2 / 2

[Storage](#) 0 / 1 GB

[AI Credits](#) 0 / 3000 credits

**GOLDBLOCKS PROJECTS**

Category	Current Value	Limit	Usage
PROJECTS	1	500	<1%
MILESTONES	0	2000	0%
TASKS	0	5000	0%

The Billing & Plans section provides a complete overview of your current subscription, usage limits, and available upgrades to ensure your workspace has the resources it needs.

## Current Plan Overview

At the top of the page, you can see the status of your primary subscription:

- Plan Type: Displays your current level of access (e.g., "All access").
- Change Plan: Click this brown button to browse different subscription tiers.

- Manage Subscription: Click this white button to update payment methods or view billing history.

# Subscription Limits

Track your real-time resource consumption through the Subscription Limits dashboard:

- Resource Progress Bars: Visual indicators show your usage for:
  - Team Seats: Displays the number of active members out of your total limit (e.g., 2 / 2).
  - Storage: Shows how much data you have used (e.g., 0 / 1 GB).
  - AI Credits: Tracks your monthly or evergreen AI usage (e.g., 0 / 3000 credits).
- Module Statistics: Detailed cards provide a breakdown of specific workspace items:
  - Projects: Tracks active initiatives (e.g., 1 of 500 used).
  - Milestones: Tracks project phases (e.g., 0 of 2000 used).
  - Tasks: Tracks individual work items (e.g., 0 of 5000 used).








# Available Add-ons & Expansions

## Available Add-ons & Expansions

7 add-ons available

Q Search add-ons...

AI & Credits CRM Team Invoicing Projects Storage Strategy Hub

 <b>Additional Usage Credits</b> A one-time top-up of 3,000 evergreen AI credits that never expire AI & Credits \$3 one-off <span>Get</span>	 <b>CRM Expansion</b> Scale your sales pipeline with 5,000 contacts, 1,000 deals, and unlimited activities CRM \$5/mo <span>Get</span>	 <b>Extra Seat</b> Add a team member to share your workspace, projects, and resources Team \$3/mo <span>Get</span>	 <b>Invoices Expansion</b> Handle high-volume billing with 25,000 additional monthly invoices Invoicing \$5/mo <span>Get</span>
 <b>Projects Expansion</b> Manage more initiatives with 2,000 active projects and 25,000 tasks Projects \$5/mo <span>Get</span>	 <b>Storage Pack</b> Add 5GB of shared storage for your team's documents, assets, and attachments Storage \$3/mo <span>Get</span>	 <b>Strategy Hub Expansion</b> Unlock massive planning capacity with 20,000 tasks and extended mind mapping limits Strategy Hub \$5/mo <span>Get</span>	

Customize your workspace by adding specific resources without changing your entire plan:

- Search & Filter: Use the search bar or category tags (AI & Credits, CRM, Team, Invoicing, etc.) to find specific upgrades.
- Add-on Options:
  - Additional Usage Credits: A one-time top-up of 3,000 evergreen AI credits (\$3 one-off).

- CRM Expansion: Increase capacity for contacts, deals, and activities (\$5/mo).
- Extra Seat: Add a new team member to your workspace (\$3/mo).
- Invoices Expansion: Handle high-volume billing with 25,000 additional monthly invoices (\$5/mo).
- Projects Expansion: Manage 2,000 active projects and 25,000 tasks (\$5/mo).
- Storage Pack: Add 5GB of shared storage for documents and assets (\$3/mo).
- Strategy Hub Expansion: Unlock 20,000 tasks and extended mind mapping limits (\$5/mo).
- Purchasing: Click the "Get" button on any card to add the expansion to your account.

## Checkout Process

The screenshot displays the checkout interface for BuildRunKit. On the left, the subscription details are shown: 'Subscribe to BuildRunKit' for \$39.99 per month. Currency options for ZAR and USD are available. The subscription includes founder tools, CRM, Project, Invoice, and Strategy Hub. The subtotal is \$39.99, and the total due today is \$39.99. On the right, there are two main payment paths: 'Pay with link' (highlighted in green) and 'OR'. Below this, the 'Contact information' section shows an email field with 'bernadette.f@buildr...' and a 'Continue with Link' button. The 'Payment method' section has 'Card' selected, showing fields for card number, MM/YY, CVC, and cardholder name. The 'Country or region' is set to 'South Africa'. There is also an option for 'Bank' payment with a '\$5 back' incentive. A large blue 'Subscribe' button is at the bottom, followed by a disclaimer: 'By subscribing, you authorize BuildRunKit - A service of Bootstrap Factory LLC to charge you according to the terms until you cancel.' At the very bottom, it says 'Powered by stripe | Terms Privacy'.

The Checkout page is the final step for any plan change or add-on purchase:

- Back to subscription: A link at the top left to return without purchasing.
- Payment Method: Confirms the card on file that will be charged for the transaction.

- Order Summary: Displays the Subtotal, Tax, and the final Total Amount Due.
- Action: Click the brown Pay & Subscribe button to finalize the order and update your workspace limits.

# Import & Export

## Settings

Manage your workspace and data settings.

[User Settings](#) [Workspace](#) [Billing & Plans](#) [Import/Export](#)

### Import & Export

#### Export Data

Export your projects, milestones, tasks, and activities to CSV files in a ZIP archive.

What do you want to export?

All Data

Projects Only

Milestones Only


Tasks Only

Activities Only

[Download Data](#)

#### Import Data

Import projects, milestones, and tasks from CSV files.



[Upload Files](#)

The Import/Export section allows you to manage your data by downloading it for external use or uploading existing records into the Goldilocks Projects ecosystem.

## Exporting Your Data

You can export your workspace records into CSV files, which are compiled into a single ZIP archive for easy download.

- Selection Options: Choose what data you wish to download by selecting All Data, or specific categories including Projects Only, Milestones Only, Tasks Only, or Activities Only.
- Download: Click the brown Download Data button to generate and save your ZIP file.
- Activities Reports: For specialized reporting, you can choose to generate an Activities Report in PDF (best for printing and sharing) or Excel (best for analysis and editing) formats.

## Importing Your Data



1  
PROJECTS

2  
MILESTONES

3  
TASKS

 [Download Templates](#)

### Step 1: Import your Projects

Start by uploading projects.csv to create the base project records.



Drag & drop your projects file.  
Max 5MB per file • .csv files only

 Upload projects



  
PROJECTS

2  
MILESTONES

3  
TASKS

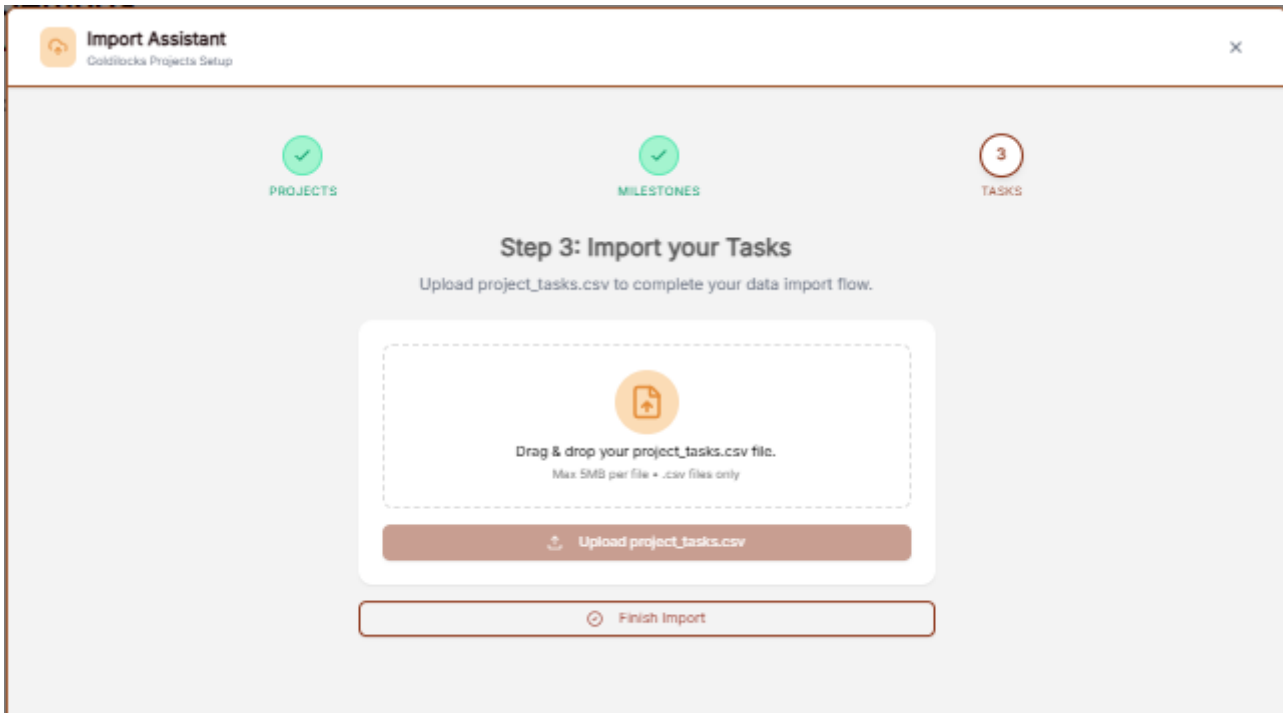
### Step 2: Import your Milestones

Upload milestones.csv after projects are imported so each milestone can map correctly.



Drag & drop your milestones file.  
Max 5MB per file • .csv files only

 Upload milestones



The Import Assistant guides you through a multi-step process to ensure all data is mapped correctly between projects, milestones, and tasks.

- Step 1: Import Projects: Start by dragging and dropping your `projects.csv` file to create the base project records. Projects are a required component of the import process.
- Step 2: Import Milestones: Once projects are imported, upload your `milestones.csv` file so each milestone can map correctly to its parent project. Milestones are also a required component of the import.
- Step 3: Import Tasks (Optional): After the milestones are imported, you have the option to upload a `project_tasks.csv` to complete your data flow.
- Finalizing: You can choose to click Finish Import immediately after successfully importing your milestones, or you can continue to the task import step if you have task data to include.

“ **Technical Note:** All import files must be in **.csv** format with a maximum size of **5MB** per file.

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