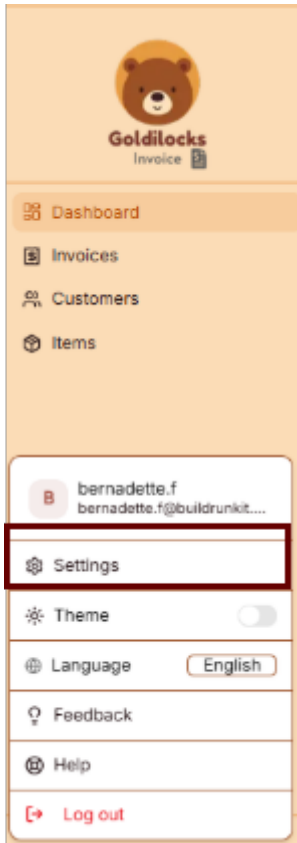


User Profile & Settings

User Profile & Settings



Settings

Configure your company information and invoice defaults

User Team & Workspace Billing & Plans Company Invoices Financial Import / Export

User

Manage your personal information Edit

Display Name: Bernadette.F Phone Number: -

Member Since: September 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 tab, you can view and update your primary account details:

- **User Profile:** This section displays your Display Name, your Phone Number, and the date you became a member. Click the Edit button to make changes to your name or phone details.
- **Email Address:** View the primary email associated with your account. You can update this by clicking Edit, which will trigger a confirmation link to your new address.

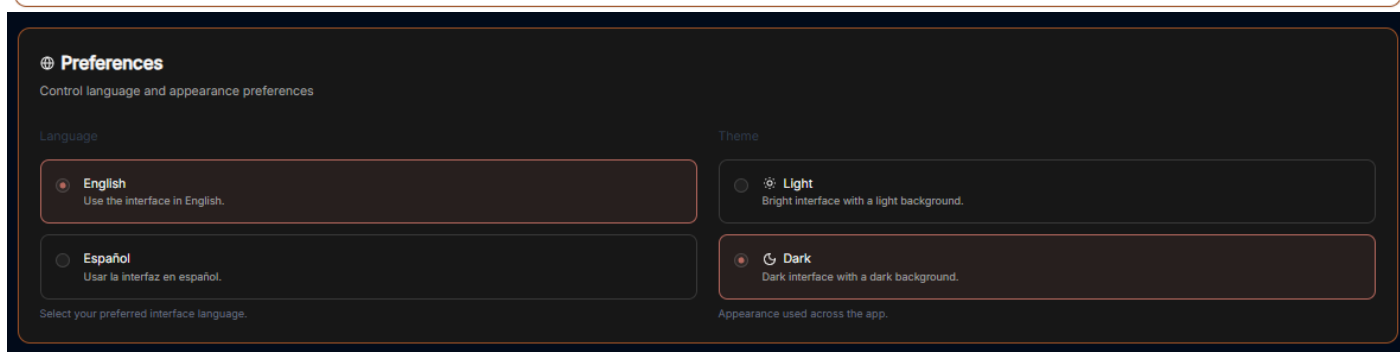
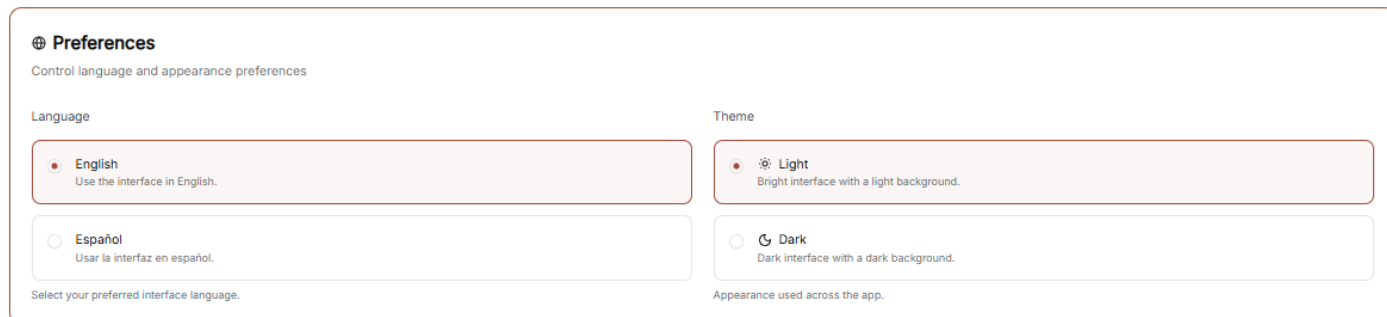
Account Security

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

- **Current Password:** Enter your existing password for verification.
- **New Password:** Create a new password containing at least 8 characters.

- Confirm: Re-enter the new password to ensure it matches, then click the brown Change Password button to finalize.

Interface Preferences



You can customize the look and language of your workspace through the Preferences menu.

Language Settings

Choose the primary language for your interface:

- English: Use the interface in English.
- Español: Usar la interfaz en español.

Theme Selection

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

- Light Theme: A bright interface with a light-colored background.
- Dark Theme: A high-contrast interface with a dark background, ideal for low-light environments.

Workspace Management

Settings

Configure your company information and invoice defaults

User Team & Workspace Billing & Plans Company Invoices Financial Import / Export

Bernadette.F's Updated Workspace
Workspace owner: Bernadette.F
Created on September 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

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

Search users

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

Rows per page: 10 Page 1 of 1

The Workspace settings allow you to control the environments you belong to, manage your team, and update workspace identities.

All Workspaces

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

- **Status & Plans:** You can see the name of each workspace and its current subscription plan (e.g., "Custom" or "Enterprise").
- **Leaving a Workspace:** By clicking the three dots (actions menu) next to a workspace, you can select Exit to remove yourself from that environment.

Edit Workspace

This is where you manage the primary identity of your current business environment.

- Changing the Name: Use the Edit Workspace section to update the display name of the workspace.
- Save Changes: Ensure you click the brown Save Changes button after renaming to apply the update across the suite.

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 (e.g., Owner).
- Invite Members: Click the + 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.

Subscription & Billing

Settings

Configure your company information and invoice defaults

[User](#)
[Team & Workspace](#)
[Billing & Plans](#)
[Company](#)
[Invoices](#)
[Financial](#)
[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

GOLDILOCKS INVOICE

CUSTOMERS

0

0%

0 of 2000 used

INVOICES

0

0%

0 of 5000 used

The Subscription area is where you manage your workspace plan, tracking limits, and payment details to ensure uninterrupted access to the Goldilocks Suite.

Plan Overview & Usage

In the Subscription tab, you can monitor your current plan's status and usage limits:

- **Active Plan:** View your current subscription tier (e.g., "Custom").
- **Billing Cycle:** Confirm the cost of your plan and the frequency of payments (e.g., "\$0.00 / Monthly").
- **Usage Trackers:** Monitor how much of your plan you have used, including your Invoices, Customers, and Items counts.
- **Plan Actions:** You can click Change Plan to upgrade or downgrade your service level, or Cancel Subscription if you wish to stop your recurring payments.

Payment Methods

The Billing tab allows you to manage the credit cards or accounts associated with your workspace:

- **Saved Methods:** View your currently active payment card, including the brand (e.g., Visa), the last four digits, and the expiration date.
- **Primary Indicator:** Your default payment method will be clearly marked with a "Primary" badge.
- **Managing Cards:** Click the three dots (actions menu) next to a saved card to remove it from your account.
- **Adding New Payments:** Click the brown + Add payment method button to securely link a new card for future billing cycles.

Subscription & Billing

Settings

Configure your company information and invoice defaults

[User](#)
[Team & Workspace](#)
[Billing & Plans](#)
[Company](#)
[Invoices](#)
[Financial](#)
[Import / Export](#)

Current Plan

All access Change Plan Manage Subscription

\$ /

Subscription Limits ⊙

Overview of your current subscription limits and usage.

	2 / 2
	0 / 1 GB
	0 / 3000 credits

GOLDILOCKS INVOICE

CUSTOMERS



0
0%

0 of 2000 used

INVOICES



0
0%

0 of 5000 used

The Subscription area is your hub for managing plan access, tracking workspace limits, and handling payments.

Subscription Overview

This tab provides a high-level view of your current standing:

- Active Plan: Displays the name of your current plan (e.g., "Custom").
- Cost Details: Shows the recurring price and billing frequency (e.g., "\$0.00 / Monthly").
- Usage Trackers: Three progress bars track your real-time usage for Invoices, Customers, and Items against your plan's total capacity.
- Management Buttons: * Change Plan: Opens the tier selection menu.
 - Cancel Subscription: Initiates the process to stop recurring payments.

Changing Your Plan

Choose the perfect plan for your growth
Start free, scale as you grow. All plans include core platform features.

Monthly Yearly

Free
Essential features for individuals.

\$0 /month

PLATFORM

- ✓ 1 User (Owner)
- ✓ 1 Workspace
- ✓ 500 one-time AI credits
- ✓ 100 MB shared storage
- ✓ 50 Contacts (shared)

BUILDRUNKIT

- ✓ 1 Journey (limited AI/features/stages)

STRATEGYHUB

- ✓ Tasks: 1 board, 20 tasks
- ✓ Problems: 1 board, 20 problems
- ✓ Thoughts: 1 board, 20 items
- ✓ Relationships: 1 board, 20 items
- ✓ Mindmap: 1 board, 20 items
- ✓ Notes: 1 board, 20 notes

GOLDILOCKS INVOICE

- ✓ 30 deals, 30 tasks, 30 activities
- ✓ 6 pipeline stages

GOLDILOCKS PROJECTS

- ✓ 1 active project
- ✓ 10 milestones, 30 tasks

GOLDILOCKS INVOICE

- ✓ 3 Invoices per month

Get Started

Most Popular

All Access
Increase limits and unlock add-ons.

\$11.99 /month
or \$119.99/year

PLATFORM

- ✓ 2 Users (Owner + 1 seat)
- ✓ 1 Workspace
- ✓ 3,000 AI credits/month (resets)
- ✓ 1 GB shared storage
- ✓ 2,000 Contacts (shared)

BUILDRUNKIT

- ✓ Full Journeys (consumes AI credits)

STRATEGYHUB

- ✓ Tasks/Problems: unlimited boards, 5,000 global
- ✓ Thoughts: 500
- ✓ Relationships: 500
- ✓ Mindmap: 500
- ✓ Notes: unlimited boards, 500 notes

GOLDILOCKS INVOICE

- ✓ 500 deals, 2,000 tasks, 2,000 activities
- ✓ 2,000 pipeline stages

GOLDILOCKS PROJECTS

- ✓ 500 projects
- ✓ 2,000 milestones, 5,000 tasks

GOLDILOCKS INVOICE

- ✓ 5,000 Invoices (delete old invoices)

Current Plan

Enterprise
Built for large teams and higher limits.

\$39.99 /month
or \$399.99/year

PLATFORM

- ✓ 5 Users
- ✓ 10,000 AI credits
- ✓ 20,000 Contacts
- ✓ 25 GB storage

GOLDILOCKS INVOICE

- ✓ 2,000 Deals
- ✓ 2,000 Projects

STRATEGYHUB

- ✓ 5x all limits

Upgrade Now

Custom
Tailored to your needs.

Contact us

EVERYTHING IN ENTERPRISE, PLUS

- ✓ Pricing based on requirements
- ✓ Custom limits and integrations
- ✓ Dedicated support
- ✓ Custom onboarding

Contact Sales

Clicking Change Plan reveals the available subscription tiers:

- Billing Toggle: A switch at the top to toggle between Monthly and Yearly pricing.
- Plan Tiers: Choose between Free, Plus, and Pro.
- Tier Limits: Each column details the specific limits for Invoices, Customers, Items, and Workspace Members.
- Action: Click the brown Choose Plan button under your desired tier to proceed.








Add-ons

Available Add-ons & Expansions

7 add-ons available

Q Search add-ons...

AI & Credits CRM Team Invoicing Projects Storage Strategy Hub

 <p>Additional Usage Credits</p> <p>A one-time top-up of 3,000 evergreen AI credits that never expire</p> <p>AI & Credits</p> <p>\$3 one-off Get</p>	 <p>CRM Expansion</p> <p>Scale your sales pipeline with 5,000 contacts, 1,000 deals, and unlimited activities</p> <p>CRM</p> <p>\$5/mo Get</p>	 <p>Extra Seat</p> <p>Add a team member to share your workspace, projects, and resources</p> <p>Team</p> <p>\$3/mo Get</p>	 <p>Invoices Expansion</p> <p>Handle high-volume billing with 25,000 additional monthly invoices</p> <p>Invoicing</p> <p>\$5/mo Get</p>
 <p>Projects Expansion</p> <p>Manage more initiatives with 2,000 active projects and 25,000 tasks</p> <p>Projects</p> <p>\$5/mo Get</p>	 <p>Storage Pack</p> <p>Add 50GB of shared storage for your team's documents, assets, and attachments</p> <p>Storage</p> <p>\$3/mo Get</p>	 <p>Strategy Hub Expansion</p> <p>Unlock massive planning capacity with 20,000 tasks and extended mind mapping limits</p> <p>Strategy Hub</p> <p>\$5/mo Get</p>	

The Add-ons tab allows for modular upgrades without changing your full plan:

- Available Features: You can purchase extra Invoices, Customers, Items, or Workspace Members.
- Pricing: Each add-on lists its specific monthly cost.
- Action: Click the brown Buy button next to the relevant feature to initiate the purchase.

Checkout Process



Subscribe to BuildRunKit

\$39.99 per month

ZAR

USD

Exchange rate and fees of your bank may apply



BuildRunKit

\$39.99

Includes our founder tools, CRM, Project, Invoice, Strategy Hub and more. For one low price, you are rea... ▼

Billed monthly \$39.99 per Subscription

Subtotal \$39.99

Add promotion code

Total due today \$39.99

Pay with link

OR

Contact information

Email [Continue with Link](#)

Payment method

Card

Card information

1234 1234 1234 1234



MM / YY

CVC



Cardholder name

Full name on card

Country or region

South Africa ▼

Bank

\$5 back

Subscribe

By subscribing, you authorize BuildRunKit - A service of Bootstrap Factory LLC to charge you according to the terms until you cancel.

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.

Company Information

Settings

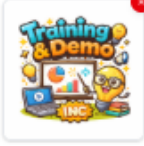
Configure your company information and invoice defaults

User Team & Workspace Billing & Plans **Company** Invoices Financial Import / Export

Company Information

This information will appear on your invoices and statements

Logo



[Change Image](#)

Upload your company logo. It will be displayed on invoices. Max size: 5MB.

Company Name

Street Number

ZIP Code

City

State

Country

This address will appear on your invoices as the 'Bill From' information.

[Save](#)

This information will appear on your invoices and statements.

- Logo: Displays your current business logo image.
 - Click the Change Image button to upload a new logo (Max size: 5MB).
 - Click the red X icon to remove the current logo.
- Company Name: A text field to enter your business name.
- Street: A text field to enter your street address.
- Number: A text field to enter your building or unit number.
- ZIP Code: A text field to enter your postal code.
- City: A text field to enter your city.
- State: A text field to enter your state.
- Country: A text field to enter your country.

This address will appear on your invoices as the 'Bill From' information.

- Save: Click the brown button at the bottom left to save your updates.

Invoices Settings

Settings

Configure your company information and invoice defaults

User Team & Workspace Billing & Plans Company Invoices Financial Import / Export

Invoice Number Prefix

INV

Prefix for invoice numbers (e.g., 'INV' creates 'INV-10001')

Next Invoice Number

10001

The next invoice will use this number

Default Payment Terms

Net 30

Due on Receipt

Net 15

Net 30 ✓

Net 60

Net 90

Save

The Invoices tab in your settings allows you to configure the numbering and default terms for your billing documents.

Invoicing Preferences

- **Invoice Number Prefix:** Enter the text that will appear before every invoice number (e.g., "INV"). The system notes that a prefix like 'INV' will create a number like 'INV-10001'.
- **Next Invoice Number:** Displays the numerical value that will be assigned to your very next invoice.
- **Default Payment Terms:** Select the standard deadline for payments from the dropdown menu. Options include:
 - Due on Receipt
 - Net 15
 - Net 30 (currently selected)
 - Net 60
 - Net 90
- **Save:** Click the brown Save button to apply any changes made to these fields.

Financial

Settings

Configure your company information and invoice defaults

[User](#) [Team & Workspace](#) [Billing & Plans](#) [Company](#) [Invoices](#) [Financial](#) [Import / Export](#)

Default Currency

Default Tax Rate (%)

Default tax rate applied to taxable items (e.g., 8.25 for 8.25%)

Save

The Financial settings tab allows you to configure your baseline currency and tax rules for all billing operations.

- **Default Currency:** A dropdown menu to select the primary currency used for generating invoices (e.g., USD - US Dollar).
- **Default Tax Rate (%):** A text field to enter the standard tax percentage applied automatically to taxable line items.
 - *Note:* Enter the numeric value directly without the percentage sign (e.g., 8.25 for 8.25%).

-
- **Save:** Click the brown button at the bottom left to finalize and apply your default financial configurations.

Revision #3

Created 2026-05-12 11:06:08 UTC by Bernadette F

Updated 2026-05-19 10:45:39 UTC by Bernadette F