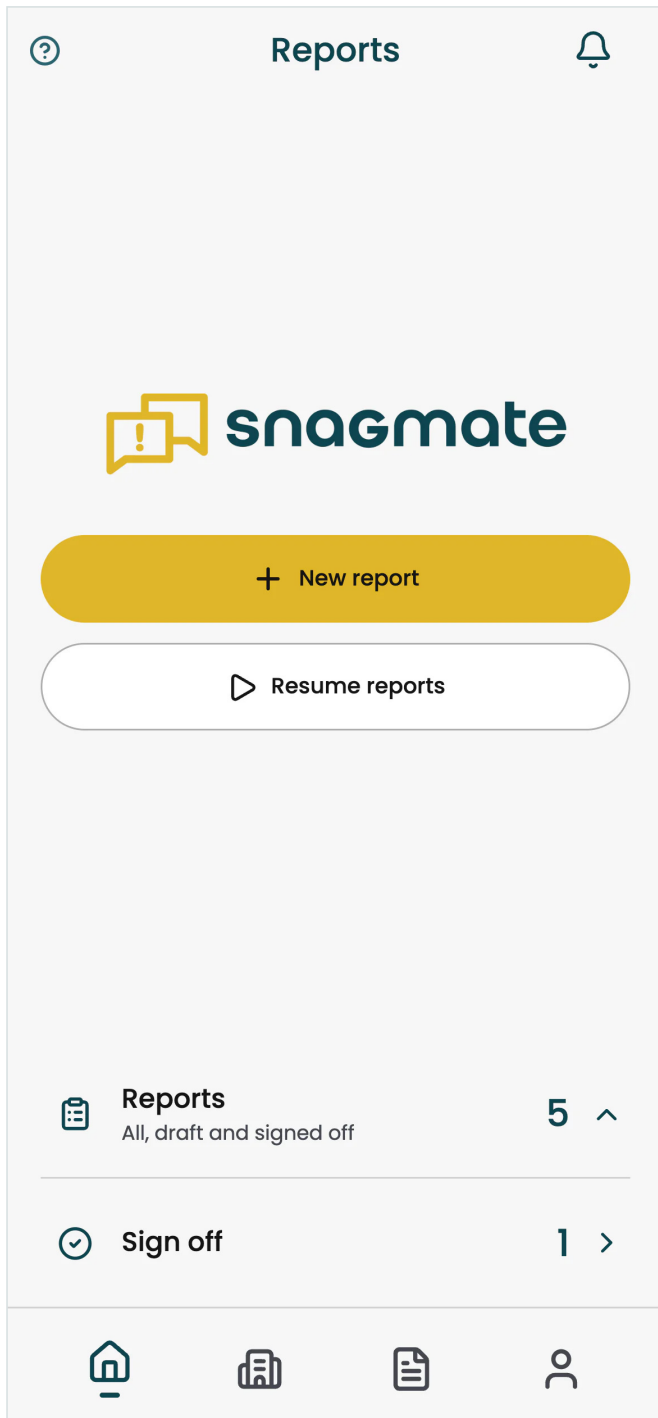


# Get your team started

From account to first project

A practical guide for property, design and construction teams. Record defects, give contractors clear evidence, and keep inspection and sign-off in one place.



Lead Home: start a report or return to saved work.

## 1 Create or join

Open the SnagMate app link shared with you. Choose Create account for your organisation, or follow your invitation. Enter your details and verify the email code. Contractors can use contractor sign-up from the sign-in page.

## 2 Choose the right plan

Free includes 2 projects, 2 reports total, up to 50 snags per report and voice notes. Solo is available immediately for one operational user, with contractor access. Team supports multiple Leads and Inspectors. See current prices in the app; contractors do not need paid operational seats.

## 3 Know your role

### Organisation Admin / Lead

Leads manage projects, assignments, reports and sign-off. Organisation Admins also manage the organisation and people.

### Inspector

Captures snags in assigned work. Assignment, report issue and review depend on the Lead's project permissions.

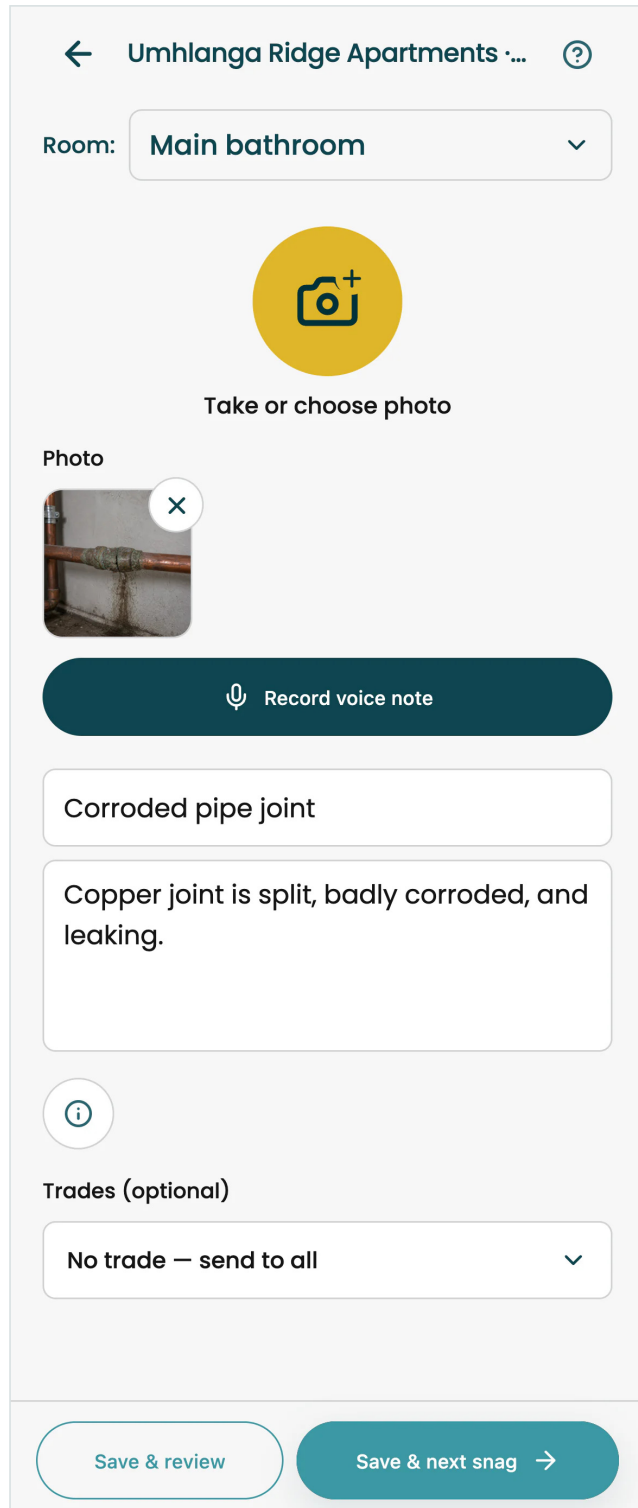
### Contractor

Works on assigned snags and sends completion proof for review.

Free is for one organisation admin and does not include team invitations. Invite colleagues when your plan and permissions allow.

# Capture a clear snag

Project > report > room > snag



The screenshot shows the SnagMate app interface for capturing a snag. At the top, there is a back arrow, the project name "Umhlanga Ridge Apartments ...", and a help icon. Below this is a "Room:" dropdown menu set to "Main bathroom". A large yellow circular button with a camera icon and a plus sign is labeled "Take or choose photo". Below this is a "Photo" section with a thumbnail image of a pipe joint and a close button. A dark blue button labeled "Record voice note" is below the photo. The "Title" field contains "Corroded pipe joint". The "Description" field contains "Copper joint is split, badly corroded, and leaking." Below the description is an information icon. The "Trades (optional)" section has a dropdown menu set to "No trade — send to all". At the bottom, there are two buttons: "Save & review" and "Save & next snag →".

Photo and voice capture use the same report context.

## 1 Set up the project

As a Lead, open Projects and create a project with its name, client and address. Add drawings, locations and your team as needed. A location follows Building > optional Floor > Unit; rooms belong to the report.

## 2 Start or resume a report

From Home, choose New report or Resume reports. Choose the project and unit/area, then the room. Inspectors can also start Without a project where that option is available.

## 3 Add the evidence

Add a snag in the room. Take or upload a clear photo, check it, and use the selected photo. Add a useful title and description, and select a responsible trade if needed. A photo is required; record a voice note if it is faster than typing, then check the resulting text.

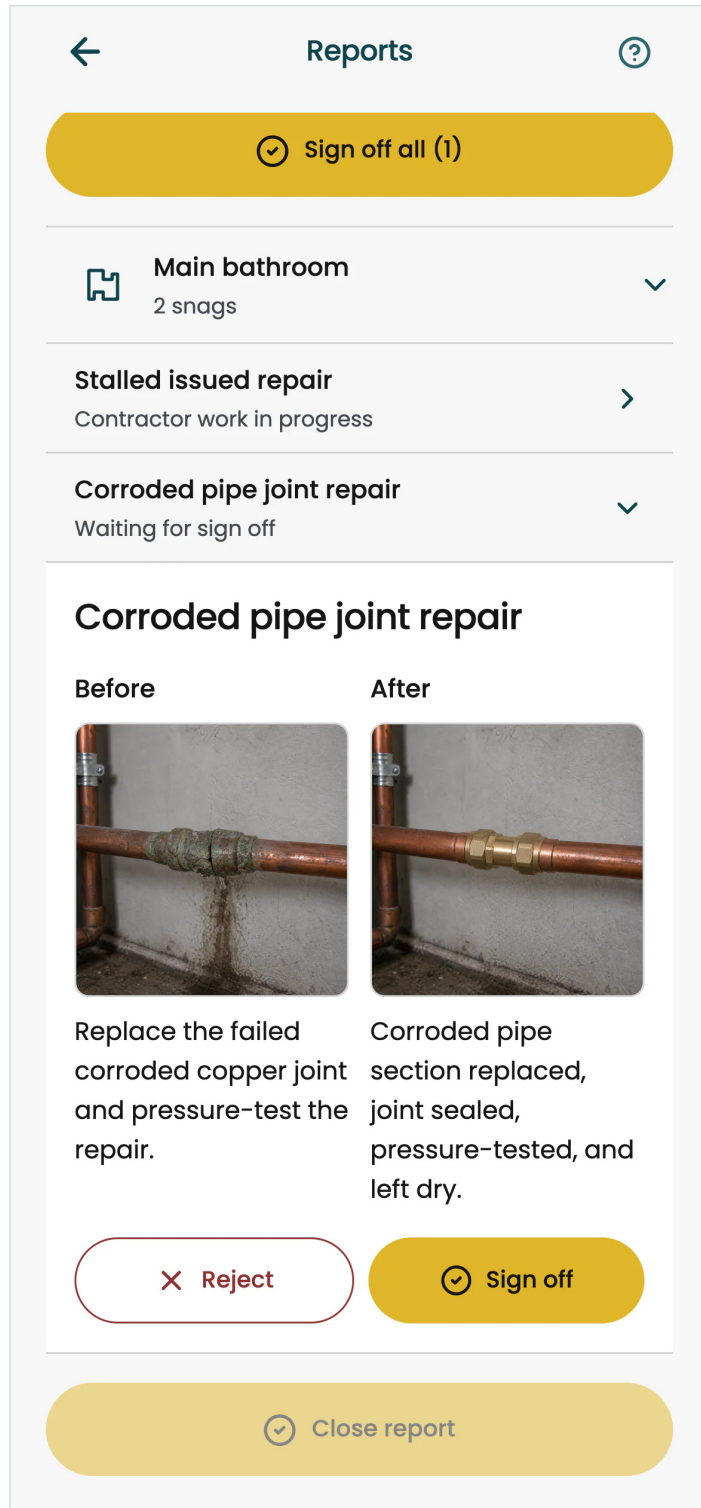
## 4 Save, check and issue

Choose Save & next snag to continue, or Save & review to check your work. Assign a contractor when permitted. Check the report, then Generate report and review the recipient confirmation. If your Inspector permissions require Lead review, send the draft to the Lead instead.

Keep one issue per snag. Use a close-up plus enough context to show exactly where the repair is needed.

# Repair, review, sign off

Completion proof closes the loop



Sign-off compares the original defect with repair proof.

## 1 Assign responsibility

The Lead, or an authorised Inspector, assigns the snag to a contractor. The contractor sees the issued work connected to their account or company.

## 2 Do the work

Contractor: open the job and start work. When complete, choose Upload proof, add at least one clear repair photo and a short completion comment, then Submit proof.

## 3 Check the result

Lead: open the Sign-off queue, choose the report and snag, and compare the Before and After evidence. Use Sign off when the work is acceptable, or reject it with a reason so the contractor can rework and resubmit.

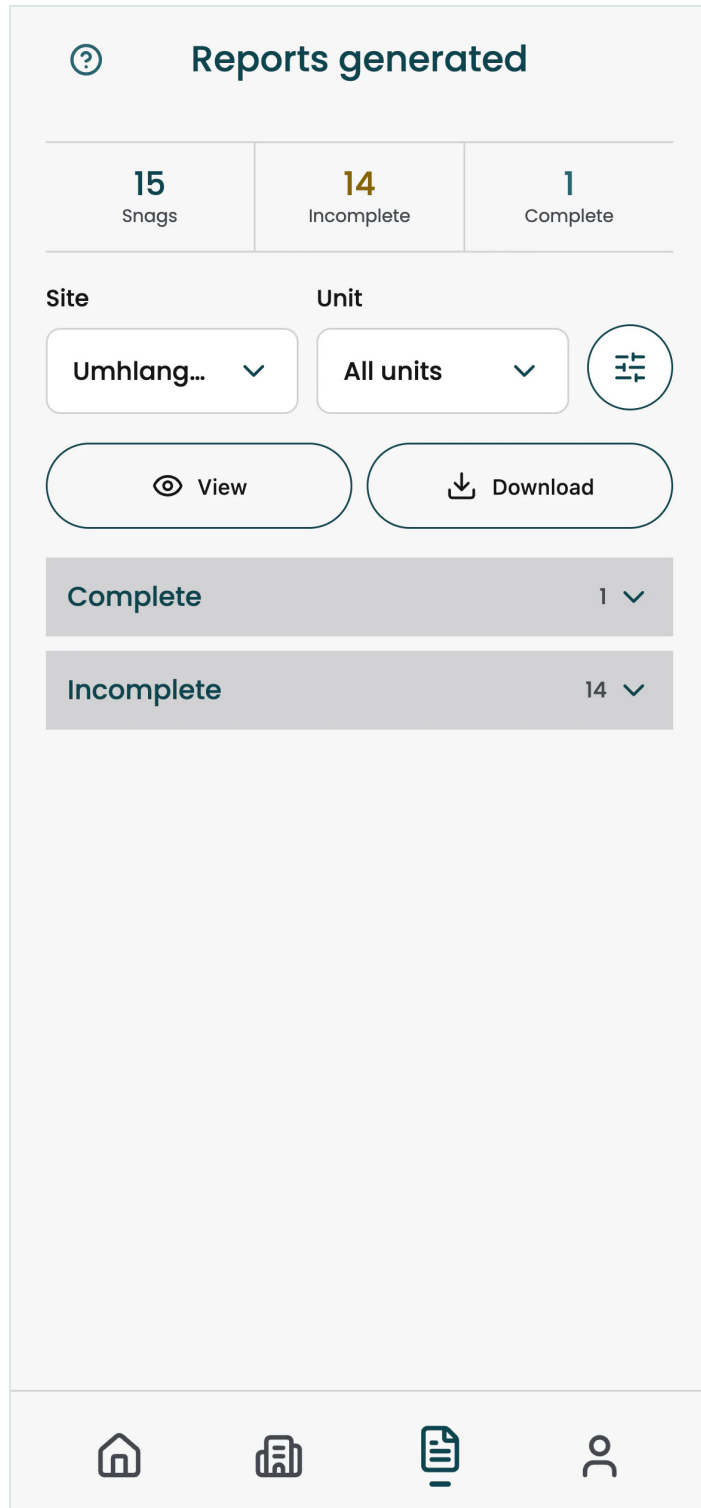
## 4 Keep the record

Approved work stays in the report history. A contractor's proof submission means it is ready for review; it is not final approval. Inspectors can review only where the project's permissions allow.

Use named accounts for each person. Contractor company staff can share the work queue while actions remain attributed to the person who performed them.

# Share the result

A clear report for clients and colleagues



Reports generated: filter the work and export a PDF.

## Send the report

Lead: open Reports generated. Choose the Site, Unit and filters, then Generate Report. When ready, choose View to check it or Download to save the PDF. For an individual issued report, open it from the Reports list on Home, choose Prepare report if needed, then Download PDF. Inspectors cannot export PDFs.

## Share a link carefully

Where available, Copy public report link shares the complete issued report. Anyone with that link can view it for 30 days, so send it only to the intended recipients. If a link expires, ask the Lead for a fresh one.

## Can I use voice on Free?

Yes. Free includes voice notes and transcription, within its project, report and snag limits. Check the text before relying on it.

## Why can't I see a project or action?

Check that you accepted the right invitation and signed in with that email. A Lead may need to assign project access or enable Inspector permissions. Contractors see the work connected to their account/company.

## Where can I get help?

Open Help for Help with this page, Replay walkthrough or Give feedback. This guide is also available there as Quick-start guide.

Screens show synthetic example data. Available controls depend on your role, project permissions and plan.