MASTERPLAN DEFECTS

USER MANUAL

Complete reference guide for site supervisors, project managers and admin teams

BUILT BY BUILDERS, FOR BUILDERS.

About This Manual

This manual covers every feature of MasterPlan Defects — from setting up your organisation and projects through to logging defects, managing subcontractors, assigning workers, generating reports, and project closeout. Use the Contents on the next page to jump directly to the section you need.

PRODUCT	AUDIENCE	WEBSITE
MasterPlan Defects	**Supervisors, PMs & Admins**	**masterplandefects.com.au**

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1. Getting Started

Welcome to MasterPlan Defects — the fastest way to log, manage and close construction defects on site. This section walks you through signing up and getting your account ready to use.

1.1 Creating Your Account

1. Navigate to masterplandefects.com.au and click Start Free Trial.
2. Enter your name, email address and a password.
3. Check your inbox for a verification email and click the confirmation link.
4. You will be prompted to create your Organisation — this is your company workspace.

FREE TRIAL
All plans include a 30-day free trial. No credit card is required to get started. You will only be charged when you choose a plan at the end of your trial.

1.2 Setting Up Your Organisation

After email verification, you will be guided through the organisation setup. Fill in the following details:

- Company Name — appears on all reports and the subcontractor portal.
- Org Owner Email — your primary account email.

- Report Email — the email address printed on all PDF reports and sent in notifications to clients and subcontractors. If left blank, the Org Owner Email is used instead.
- Phone — your company phone number, shown on reports.
- Address — your company or postal address, shown on reports.
- Website — your company website, shown on reports.
- Logo — upload your company logo (PNG or JPG, minimum 400px wide recommended).
- Primary Colour — hex colour code applied to your reports and subcontractor portal.

IMPORTANT — REPORT EMAIL
The Report Email is the contact email printed on every PDF report you send to clients and principals. Set this to the appropriate business contact address — for example, a project inbox or admin email rather than a personal account. If nothing is entered, the account owner's email will appear on all printed reports.

1.3 Signing In

Visit masterplandefects.com.au and click Sign In. Enter your email and password. If you forget your password, click Forgot Password on the sign-in page to receive a reset email.

1.4 Installing as a Mobile App (PWA)

MasterPlan Defects works as a Progressive Web App — it can be installed on your phone's home screen like a native app, with offline capability.

QUICKEST WAY TO INSTALL
Visit masterplandefects.com.au on your desktop and scan the QR code on the landing page with your phone camera. This takes you directly to the app and prompts you to install it to your home screen — no app store required.

On iPhone (Safari):

1. Open masterplandefects.com.au in Safari.
2. Tap the Share button at the bottom of the screen.
3. Tap Add to Home Screen.
4. Tap Add — the app icon will appear on your home screen.

On Android (Chrome):

1. Open masterplandefects.com.au in Chrome.
2. Tap the three-dot menu in the top right.
3. Tap Add to Home Screen or Install App.
4. Tap Install.

OFFLINE MODE
MasterPlan Defects supports offline defect logging for situations where internet access is unavailable — such as basements, lift shafts, or remote areas of a site. To use offline mode, you must prepare your project while still connected to WiFi. The offline workflow is: open your project while online → tap “Log Defects” to load the project → tap the back arrow → tap

“Download for Offline Use” → go to the area without signal → log defects using Batch Mode → defects sync automatically when your connection is restored. Only defect logging is available offline — Reports, Dashboard, Settings, and project management features require an internet connection. AI Voice Logging also requires an internet connection. See Section 5.8 for the complete offline workflow.

1.5 The Dashboard (Home)

After signing in, clicking Home in the left sidebar takes you to the Dashboard. This is your central overview of all defect activity across your organisation.

Getting Started Checklist

At the top of the dashboard you will see three setup cards:

- Set up your organisation — click to go directly to Settings > Organisation to complete your company info and branding.
- Manage projects — click to open the Projects panel where you can create a new project or open an existing one.
- Invite admin members — click to go directly to Settings > Team to invite organisation admins.

NOTE

These checklist cards remain on the dashboard permanently as quick-access shortcuts — they do not disappear once completed.

Project Analytics

Below the checklist is the Project Analytics section. Use the All Projects dropdown to view stats for all projects combined, or select a specific project to filter the analytics to that project only.

Defect Stat Tiles

Six stat tiles give you an at-a-glance count of defects by status:

- Total Defects — total number of defects logged across the selected project(s).
- Open — defects that have been logged but not yet actioned.
- Overdue — defects past their due date that are not yet closed.
- Sub Closeout — defects where the subcontractor has uploaded evidence and marked complete, awaiting inspector review.
- Disputed — defects the subcontractor has disputed, pending contractor review.
- Closed — defects that have been reviewed and closed.

Status Breakdown Chart

A donut chart showing the proportion of defects in each status — Open, Subcontractor Closeout, Disputed, and Closed.

Priority Breakdown Chart

A bar chart showing defect counts broken down by priority level — Medium, Critical, High, and Low.

By Trade Chart

A horizontal bar chart showing the total number of defects assigned to each trade.

2. User Roles & Permissions

MasterPlan Defects uses a role-based access system. Each user is assigned a role that controls what they can see and do within the platform.

Role	Scope	Key Capabilities
Org Owner	Organisation	The account that created the organisation. Cannot be removed, deleted, or demoted. Can delete projects immediately without approval.
Admin	Organisation	All projects in the organisation. Invite and manage team members, handle billing and subscription, manage org settings and branding.
Project Admin	Project	Manage project structure, log and manage defects, invite subcontractors, manage project members. Cannot manage billing or org-level settings.
Inspector	Project	Log defects, manage project structure, invite subcontractors. Cannot manage billing or org-level settings.
Viewer	Project	Read-only access. Can view defects, reports and project data. Cannot log or edit defects.
Subcontractor	Portal only	View only their assigned defects. Upload rectification photos, add comments, assign workers, mark items complete. No access to dashboard or admin.

FOLLOW-UPS AND PROJECT ACCESS

Follow-ups: Org Admins (all projects) and Project Admins (their own projects) can set up and act on follow-ups. Inspectors can view them only. Viewers and Subcontractors cannot see them. See Section 12.

Project-based access: subcontractor company lists, defects, comments and photos are limited to members of the project, according to their project role.

2.1 Org Owner

The Org Owner is the person who originally signed up and created the organisation. They share the Admin role but have additional elevated permissions that no other user — including other Admins — can override.

Org Owner Privileges:

- Can delete a project immediately without requiring a second admin's approval.

- Can approve their own project deletion requests.
- Cannot be removed, deleted, or demoted by any other user.
- Cannot have their role changed.
- Displayed with a green Org Owner badge in Settings > Team.
- Receives an email notification whenever a project deletion is approved by another admin.

NOTE
Org Owner status is permanently assigned to the account that created the organisation. Ownership cannot be transferred to another admin.

2.2 Assigning Roles

Roles are assigned when inviting a team member. Admins can change a member's role at any time from Settings > Team.

2.3 Subcontractor Access

Subcontractors receive a separate invitation email with login credentials for the Subcontractor Portal. They can only see defects assigned to their company and cannot access any other part of the application. If a subcontractor works across multiple projects, they will see a project selector when they log in and can switch between projects. See Section 8 for the full subcontractor workflow.

3. Organisation Setup

Organisation settings control your company branding, team members, and billing. Only Admins can access these settings.

3.1 Accessing Settings

From the left sidebar, click Settings. From here you can access your Profile, Password, Organisation info, Team members, and Subscription.

3.2 Company Info & Branding

Company Info

- Company Name — displayed on all reports and the subcontractor portal.
- Org Owner Email — the primary account email address.
- Report Email — the email address printed on all PDF reports and sent in notifications.
- Phone — your company phone number, shown on reports.
- Address — your company or postal address, shown on reports.
- Website — your company website, shown on reports.
- LinkedIn — optional, shown on reports.
- Instagram — optional, shown on reports.

Click Save Company Info to save any changes to these fields.

> **IMPORTANT — REPORT EMAIL**
> The Report Email is the contact email printed on every PDF report you send to clients and principals. Set this to the appropriate business contact address. If nothing is entered, the account owner's email will appear on all printed reports.

Logo

Upload your company logo using the Replace button. Click the red delete button to remove the current logo. Recommended format: PNG or JPG, minimum 400px wide.

Brand Colours

- Primary Colour — the main brand colour applied to your reports and subcontractor portal.
- Secondary Colour (optional) — a supporting colour for reports.
- Accent Colour (optional) — an additional accent colour for reports.

Click Save Colours to apply your changes.

Export Data

At the bottom of the Organisation settings page you can export your organisation's data:

- Export All Defects — downloads all defects across all projects, including photos metadata.
- Export Projects Summary — downloads a summary of all projects with defect counts and status.

3.3 Inviting Organisation Admins

Settings > Team is where you manage Organisation Admins only — users who have full access to all projects and settings across your organisation.

1. Go to Settings > Team.
2. Click Invite Admin.
3. Enter their name and email address.
4. Click Send Invitation — they will receive an email with a link to set up their account.

> **NOTE**
> Only Organisation Admins are managed from Settings > Team. Project-level members (Project Admins, Inspectors, Viewers) and Subcontractors are invited from within each individual project.

3.4 Removing Team Members

To remove an organisation admin, go to Settings > Team, find the member, and click Remove. Their access is revoked immediately.

4. Project Setup

Projects are the top-level container for all defect work. Each project has its own building hierarchy, team members, and subcontractor assignments.

4.1 Creating a Project

Only Organisation Admins can create new projects.

1. From the Home dashboard, click the Manage Projects shortcut card.
2. Click + Create New Project.
3. Enter the project name, address, and client name.
4. Select the Building Type from the dropdown — choose the type that best matches your project:

Building Type	Use For
Apartment / Residential	Apartment buildings (multi-unit residential developments).
House / Townhouse	Single-house builds, duplexes, and townhouse complexes (no apartment layer).
Commercial	Office buildings, retail centres, mixed-use commercial developments.
Institutional	Hospitals, schools, universities, government buildings, aged care.
Industrial	Warehouses, factories, logistics facilities, industrial estates.

5. (Optional) Add any project-specific Custom Areas in the Custom Areas section — e.g. Wine Cellar, Pool Deck, Driveway. These appear in the Room dropdown when logging defects on this project. Custom Areas can also be added later by typing in the “Other” field during defect logging.
6. Assign a Project Admin.
7. Click Create Project.

IMPORTANT — BUILDING TYPE
The Building Type you select determines the location hierarchy and preset locations used throughout the project. Apartment / Residential projects use the four-level Building → Level → Apartment/Area → Room/Area hierarchy. House / Townhouse projects use a three-level Building → Level → Room hierarchy with no apartment layer. Commercial, Institutional, and Industrial projects use Building → Level → Location with preset commercial locations. Building Type cannot be changed after the project is created — choose carefully.

NOTE
Only Organisation Admins can create new projects. Project Admins and Inspectors can be given access to existing projects but cannot create new ones.

4.2 The Project Page

When you open a project you will see the project details at the top (name, address, client, status) along with building and defect counts. Below that are the following action buttons:

- Manage Buildings & Levels — set up and edit the project's building hierarchy.
- Manage Subcontractors — add subcontractors and send portal invitations.
- Manage Members — invite and manage project team members.
- Log Defects — the main orange button to start logging defects on this project.
- Follow-ups: opens the project's automatic follow-up emails to subcontractors. An amber number shows how many need your attention. See Section 12.
- Inspection mode buttons (between Follow-ups and Log Defects): Purchaser, Client, Architect, Engineer and RBS. Turn one on to tag every defect you log with that inspection type. See Section 6.
- Full Project Report — generate a full PDF report for this project.
- Export Excel — download all defect data for this project as a spreadsheet.
- Download for Offline Use — download the project data to your device while on WiFi.

OFFLINE USE

To prepare a project for offline use while connected to WiFi: first tap “Log Defects” to load the project data, then tap the back arrow to return to the project page, then tap “Download for Offline Use”. This downloads all project data (buildings, levels, subcontractors, existing defects, and floor plans) onto your device. You must do this each time before going offline, as any changes made by other team members since your last download will not be available offline. Once offline, “Log Defects” is the only action available. All other buttons (Manage Buildings, Manage Subcontractors, Reports, Export) are disabled when offline and will show a “Not available offline” message if tapped. See Section 5.8 for the complete offline workflow.

4.3 Building Hierarchy

MasterPlan Defects uses a location hierarchy to pinpoint exactly where a defect is located. The hierarchy varies depending on the Building Type selected when the project was created.

4.3a Building Types

The Building Type selected at project creation determines the location structure used throughout the project. There are five Building Types: Apartment / Residential, House / Townhouse, Commercial, Institutional, and Industrial.

Residential / Apartment Projects

Uses the full four-level hierarchy:

- Building — the top-level structure (e.g. Building A, Tower 1).
- Level — the floor within the building (e.g. Level 1, Ground Floor).
- Apartment / Area — the unit or zone on that level (e.g. Apartment 101, Common Area).
- Room / Area — the specific room within the apartment (e.g. Kitchen, Master Bedroom, Bathroom 1).

House / Townhouse Projects

Uses a three-level hierarchy with no apartment layer. Defects are logged directly against the Level using the Room dropdown:

- Building — the top-level structure. For a single house, this is the house itself. For a townhouse complex, each individual townhouse is its own Building (e.g. Townhouse 1, Townhouse 2, Townhouse 3).
- Level — the floor within the house or townhouse (e.g. Ground Floor, Level 1, Basement).
- Room — the specific room from the standard list (Kitchen, Bedroom 1 to Bedroom 4, Bathroom, Ensuite, Lounge, Dining, Study, etc.) plus any project-specific custom areas added at project setup or via the “Other” field during defect logging. See Custom Areas below.

NOTE
House / Townhouse projects do NOT auto-seed the 33 commercial preset locations when a Level is created. Levels start empty and you log defects directly against the Level using the Room dropdown. The standard 15 residential rooms (Kitchen, Bedroom 1-4, Bathroom, Ensuite, Lounge, Dining, Study, Laundry, Entry, Hallway, Balcony / Terrace, plus Other) are available, and you can add project-specific custom areas (e.g. Driveway, Pool Deck, Garage) at project setup or whenever you select Other and type a new name.

Commercial, Institutional, and Industrial Projects

Uses a three-level hierarchy with Location replacing Apartment/Area. The Room/Area field is not used on these project types:

- Building — the top-level structure (e.g. Building 1, Tower A).
- Level — the floor within the building (e.g. Ground Floor, Level 2, Basement 1).
- Location — the specific area on that level, selected from a preset list or custom additions.

NOTE
When a new Level is created on a Commercial, Institutional, or Industrial project, 33 standard preset locations are automatically added to that level. You can then add project-specific custom locations on top using the Add Location button.

Preset Locations (Commercial / Institutional / Industrial)

The following locations are automatically available on all non-residential projects:

Access & Circulation	Amenities	Services & Plant	Storage & General
Basement / Car Park	Change Room / Shower Room	Comms Room	Back of House
Corridor / Hallway	Cleaners Room	Fire Pump Room	Bike Storage
Entry Foyer	Disabled Toilets	MSSB Room	Common Area
Fire Stair	Female Toilets	Plant Room	External Areas
Lift	Kitchen	SCV Cupboard	Garbage / Waste Room
Lift Lobby	Male Toilets	Server Room	Loading Dock
Reception		Service Cupboards	Retail Tenancy
Roof / Rooftop		Substation	Security Room
Waiting Area / Lobby			Shell
			Storage Room

TIP
Custom locations specific to your project can be added via Manage Buildings & Levels. When you add a new level on a non-residential project, all 33 preset locations are automatically added. Use the Add Location button under each level to add project-specific areas on top of the presets.

Adding Buildings:

1. Open your project and click Manage Buildings & Levels.
2. Click Add Building, enter the building name, and save.

Adding Levels:

1. Select the building, then click Add Level.
2. Enter the level name and save.

For non-residential projects: all 33 preset locations are automatically added to the new level. A banner at the top of the Manage Buildings page will remind you to review your locations and add any project-specific areas before logging defects.

Adding Custom Locations (non-residential projects):

1. Select the level in Manage Buildings & Levels.
2. Click the Preset Locations toggle to expand and view existing preset locations.
3. Click Add Location to add a custom location specific to this project.
4. Enter the location name and save.

Adding Apartments / Areas (residential projects):

1. Select the level, then click Add Apartment / Area.
2. Enter the apartment or area name and save.

Custom Room / Areas (all project types)

Custom Areas let you add project-specific room or location names that are not in the standard list — for example, “Wine Cellar”, “Pool Deck”, “Driveway”, or “Theatre Room”. Custom Areas are stored per project and apply to all building types. Once added, they appear in the Room dropdown when logging defects, and the AI voice logging feature recognises them when spoken.

Adding Custom Areas at Project Setup:

3. When creating a new project, scroll to the Custom Areas (optional) section in the New Project form.
4. Type a custom area name (e.g. Pool Deck) and click Add. The area appears in the list with a remove button.
5. Repeat for each custom area you want to add upfront. Click Create Project to save.

Auto-Save from the “Other” Field:

You don’t have to add custom areas at project setup. When logging a defect, if the room you need is not in the dropdown, simply select “Other” and type the name — for example, “Pool Deck”. When you submit the defect, the new name is automatically saved as a custom area for that project. The next defect you log on the same project will see “Pool Deck” as a regular dropdown option, and the voice feature will recognise it.

NOTE
Custom area names are normalised when saved — leading and trailing whitespace is trimmed and the name is converted to Title Case (e.g. “wine cellar” becomes “Wine Cellar”). If a typed name matches a standard room (case-insensitive), the standard entry is used and no duplicate custom area is created. Each project has its own list — custom areas added on Project A do not appear on Project B.

TIP
Set up your full building structure before logging defects — this ensures the AI voice logging feature can accurately identify locations from spoken descriptions.

4.3b Floor Plan Pin Colours

When defects are pinned to a floor plan, each pin is colour coded by the current status of the defect:

Status	Pin Colour	Description
Open	Red #ef4444	Defect has been logged and is awaiting action.
Subcontractor Closeout	Teal #14b8a6	Subcontractor has uploaded evidence and marked complete. Awaiting inspector review.
Closed	Green #22c55e	Defect has been reviewed and closed.
Disputed	Purple #a855f7	Subcontractor has disputed the defect. Returned to contractor for review.

4.4 Assigning Subcontractors

Subcontractors must be added to a project before they can receive defect assignments.

1. Open your project and click Manage Subcontractors.
2. Click Add Subcontractor.
3. Enter the company name, email address and trade. Every company needs an email address.
4. Click Add.
5. An invitation email with their portal login is sent automatically as soon as the company is added.

NOTE — MULTI-PROJECT SUBCONTRACTORS
If a subcontractor's email is already registered from another project, the system will automatically link their existing account to this project. They will receive a 'You have been added to a new project' email with a link to access their portal. They do not need a new password.

CONTACTS (UP TO 3 PER COMPANY)
Each subcontractor company can have up to 3 contacts, including the main contact. Open the company's Contacts box to Add contact, Make main or Remove a contact.
Every contact can use the portal and receives defect notifications and follow-up emails, each with their own copy.
A company name cannot be changed once defects have been logged against it.

4.5 Managing Project Members

Once a project is created, the Org Admin assigns a Project Admin by clicking Manage Members from within the project.

AUTHORITY CHAIN
Org Admin → assigns Project Admin → Project Admin invites Inspectors & Viewers → Project Admin and Inspectors can both invite Subcontractors. Only an Org Admin can assign the Project Admin role.

Inviting a Project Admin (Org Admin only):

1. Open the project from the Projects tab.
2. Click Manage Members.
3. Click Add Member, enter their details, and assign the Project Admin role.
4. Click Send Invitation — they will receive an email to set up their account.

Inviting Inspectors and Viewers (Project Admin only):

1. Open the project and click Manage Members.
2. Click Add Member.
3. Enter their details and assign the appropriate role.
4. Click Send Invitation.

Inviting Subcontractors (Project Admin or Inspector):

1. Open the project and click Manage Subcontractors.
2. Click Add Subcontractor.
3. Enter the company name, email address and trade. Every company needs an email address.
4. Click Add.
5. An invitation email with their portal login is sent automatically as soon as the company is added.

4.6 Deleting a Project

Deleting a project permanently removes all project data including buildings, levels, defects, photos, reports, and subcontractor records. A two-admin approval process is required for regular admins.

Regular Admin — Two-Admin Approval Required:

1. Open the project and click Delete Project.
2. Confirm the deletion request.
3. An email notification is sent to all other organisation admins.

4. One other admin must approve the deletion.
5. Once approved, the project and all its data are permanently deleted.

Org Owner — Immediate Deletion:

The Org Owner can delete a project immediately without requiring a second admin's approval.

WARNING

Project deletion is permanent. All defects, photos, reports, floor plans, and subcontractor data for that project will be immediately and irreversibly removed. Make sure you have exported any reports or data you need before deleting.

5. Logging Defects

Logging defects is the core function of MasterPlan Defects. There are three ways to log a defect: Single Defect Mode, Batch Mode, and AI Voice Logging.

5.1 The Defects Screen

Click Defects in the left sidebar to open the Defects screen. This shows all defects across your projects. From here you can:

- Filter by project using the project dropdown at the top.
- Search defects by keyword using the search bar.
- Apply detailed filters using the Filters button.
- Log a new defect using the orange + Log Defect button.
- Turn an inspection mode on or off using the Purchaser, Client, Architect, Engineer and RBS buttons next to the Log Defect button. See Section 6.
- Generate a PDF Report for the selected project.
- Export all defect data to Excel.

5.2 Before You Log — Set Your Location

When you click Log Defect or open the Log Defects screen, you will be prompted to Set Your Location. The fields shown depend on the project's Building Type.

Residential projects:

1. Select your Project from the dropdown.
2. Select your Building.
3. Select your Level.
4. Select your Apartment / Area (required).
5. Select your Room / Area. If not listed, select Other and type the room name.
6. Click Lock Location & Start Logging.

House / Townhouse projects:

7. Select your Project from the dropdown.
8. Select your Building (the house, or for a townhouse complex, the specific townhouse).
9. Select your Level (Ground Floor, Level 1, Basement, etc.).
10. Select your Room from the dropdown — includes the standard list (Kitchen, Bedroom, Bathroom, etc.) plus any custom areas added to this project. If not listed, select Other and type the room name. The new name will be saved as a custom area for next time.
11. Click Lock Location & Start Logging. There is no Apartment selection step on House / Townhouse projects.

Commercial / Institutional / Industrial projects:

1. Select your Project from the dropdown.
2. Select your Building.
3. Select your Level.
4. Select your Location (from the preset list or custom locations added in Manage Buildings).
5. Click Lock Location & Start Logging.

TIP
Click Log a single defect instead to skip location locking if you only need to log one defect quickly.

5.3 The Defect Form

Once your location is locked, the floor plan for that level will appear. Tap anywhere on the floor plan to place a pin marking the exact defect location — this is optional but strongly recommended.

Below the floor plan, fill in the defect details:

- Title — brief description of the defect. Required.
- Description — additional detail. Optional but recommended.
- Category — type of defect (e.g. Structural, Waterproofing, Paintwork).
- Trade — the trade responsible for the rectification.
- Priority — Low, Medium, High, or Critical. Defaults to Medium.
- Subcontractor — the specific subcontractor assigned to this defect.
- Due Date: target completion date. Optional, except for Incomplete Work, which needs a due date (see below).
- Photos — tap the Add button to take a photo or select from your camera roll.

Click the orange Log Defect button to save the defect.

TIP
The Voice Fill button (orange microphone, bottom right) is available throughout the form. Tap it at any time to fill the form using your voice instead of typing. See Section 5.5 for full voice logging instructions.

INCOMPLETE WORK NEEDS A DUE DATE
When the category is Incomplete Work, a due date is required. The message "Incomplete Work needs a due date." appears at the due date field, and the item cannot be logged until a date is entered. This applies to batch, single and voice logging, online and offline.
When editing, you cannot switch an item to Incomplete Work without a due date, or clear the due date of an Incomplete Work item. Older Incomplete Work items saved without a date can still be edited in every other way.

ITEM REFERENCES
Each new item gets a reference made from its project's code and a number, for example AUTO-0001. Each project numbers its own items from 1.
The project code is made automatically from the first four letters or numbers of the project name when the project is created. It does not change if the project is renamed.
Items logged before November 2026 keep their original DEF- reference. Items logged offline show a temporary OFFLINE- reference until they sync.

5.4 Batch Mode

Batch Mode allows you to log multiple defects across a locked location in one session. After locking your location, each defect uses the same form as Single Defect Mode. After

submitting one defect, the form resets and you can log the next one without re-entering the location.

5.5 AI Voice Logging

AI Voice Logging is the fastest way to log a defect on site — speak naturally in one sentence and the AI fills in the entire form for you.

REQUIREMENT
AI Voice Logging requires an active internet connection. It will not function in offline mode.

TIP
The orange Voice Fill button (microphone icon, bottom right) is visible immediately when you open the Log Defects screen — you do not need to set a location or click anything first. Just tap the mic and speak.

How to Use Voice Logging:

1. Open the Log Defects screen — the orange Voice Fill button is immediately visible at the bottom right.
2. Tap the orange Voice Fill button (microphone icon).
3. A prompt card will appear showing available options — buildings, levels, locations/apartments, rooms (including any custom areas added to this project), trades, categories and subcontractors.
4. Wait for the mic to be ready.
5. Speak clearly and naturally — describe the defect in one sentence.

EXAMPLE — RESIDENTIAL
"Cracked plasterboard in apartment 302 bedroom, high priority, assigned to Smith Plastering, due in 7 days."

EXAMPLE — HOUSE / TOWNHOUSE
"Townhouse 3, Ground Floor, master bedroom ensuite, cracked tile in shower, tiling, medium priority, Bath & Tile Co, due Friday."

EXAMPLE — COMMERCIAL/INSTITUTIONAL/INDUSTRIAL
"Building 1, Ground Floor, Plant Room, missing inspection tag on fire suppression pipe, fire protection, high priority, ABC Fire Services, due in 7 days."

1. The app will automatically stop recording after silence, or tap Tap to Stop.
2. Your audio is sent to OpenAI Whisper for accurate transcription.
3. The transcript is then processed by AI to extract and fill all form fields automatically — including building, level, location/apartment, title, description, category, trade, priority, subcontractor, and due date.
4. The form fills all recognised fields. A green banner confirms: Form filled by voice — please review and add photos before submitting.

5. Review the filled fields, make any corrections, add photos, and place a floor plan pin if a floor plan has been uploaded for that level, then click Log Defect.

TIPS FOR BEST RESULTS

• Speak clearly and at a normal pace. • Mention the building, level, and location/apartment name exactly as set up in Manage Buildings. • Use subcontractor names as they appear in your project. • Say 'due in X days' or a specific date for the due date. • If a field is not recognised, simply edit it manually before submitting.

5.6 Adding Photos

Photos can be added to any defect during logging or when editing an existing defect. Tap the Add button in the Photos section to take a new photo, select from your camera roll, or add multiple photos.

TIP

Always add at least one photo when logging a defect. Photos provide clear evidence of the issue and appear in all PDF reports.

5.7 Floor Plan Pin-Drop

If your level has a floor plan uploaded, a Floor Plan section appears after you lock your location. Tap anywhere on the floor plan to place a pin at the exact defect location. The pin is optional but strongly recommended — it appears in reports and changes colour as the defect status changes.

5.8 Offline Defect Logging

MasterPlan Defects allows you to log defects without an internet connection. This is designed for situations where you lose signal on site — such as basements, lift shafts, underground car parks, or areas with poor mobile coverage.

Preparing for Offline Use

Before heading to an area without signal, you must download the project data while still connected to WiFi or mobile data. Follow these steps:

- Make sure you are connected to WiFi or mobile data.
- Open the Projects tab and select your project.
- Tap “Log Defects” on the project page — this loads the project data into memory. This step is required before the download will work.
- Tap the back arrow to return to the project page.
- Tap “Download for Offline Use” — this saves all project data to your device including buildings, levels, apartments/locations, subcontractors, existing defects, and floor plan images.
- Wait for the download to complete.
- You are now ready to go offline.

IMPORTANT

You must tap “Download for Offline Use” each time before going to an area without signal. Any changes made by other team members since your last download will not be reflected in your offline data.

Logging Defects Offline

Once you are in an area without signal:

- Open the Projects tab — this is the only navigation tab available offline. All other tabs (Defects, Reports, Dashboard, Settings) are greyed out.
- Select your project.
- Tap “Log Defects” — this is the only active button on the project page. All management and reporting buttons are greyed out.
- Lock your location as normal (Building → Level → Apartment/Location).
- Fill in the defect form — title, description, category, trade, priority, subcontractor.
- Take photos using your camera — photos are stored locally on your device.
- Place a pin on the floor plan — floor plans are available offline after downloading.
- Tap “Log Defect” to save — the defect is queued for upload.
- Continue logging more defects in Batch Mode.

What Works Offline

1. Batch defect logging with all form fields
2. Taking and attaching photos
3. Floor plan viewing and pin placement
4. Location selection (all buildings, levels, and apartments/locations from your download)
5. Subcontractor assignment (from your downloaded subcontractor list)

What Does NOT Work Offline

1. AI Voice Logging (requires internet)
2. Reports and PDF generation
3. Excel export
4. Managing buildings, levels, or subcontractors
5. Viewing the Dashboard or Settings
6. Viewing individual defect details
7. The Defects list tab

Syncing When Back Online

When you return to an area with internet:

- The app detects your connection and shows a “You’re back online” banner.
- Defects logged offline begin syncing automatically — photos are uploaded and defect records are created on the server.
- If sync does not start automatically, tap the “Sync Now” button at the top of the screen.
- Once synced, your offline defects appear in the Defects list and are visible to all team members and subcontractors.

NOTE

Do not close the app or clear your browser data before sync is complete. If you see a sync indicator or pending count, wait for it to finish before closing.

TIP

Offline mode is designed for temporary loss of signal. For the best experience, log defects online whenever possible — this gives you access to AI Voice Logging, instant subcontractor notifications, and real-time collaboration with your team.

6. Inspection Modes (including Purchaser Inspections)

MasterPlan Defects can tag each defect with the type of inspection it came from. Builder QA defects are logged by your own team during construction. The other types are for defects raised during an inspection by someone else: a purchaser, the client, the architect, an engineer or the RBS (relevant building surveyor). When an inspection mode is on, every defect you log is tagged with that type until you turn the mode off.

6.1 Overview

Six inspection types are supported:

- **Builder QA (default).** Defects found by your own team during construction, internal quality assurance or routine site inspections. This is the type used when no inspection mode is on.
- **Purchaser.** Defects raised by the purchaser or their representative during a handover walk-through, a settlement inspection or a post-handover visit.
- **Client.** Defects raised by the client or principal.
- **Architect.** Defects raised by the architect.
- **Engineer.** Defects raised by an engineer.
- **RBS.** Defects raised by the relevant building surveyor.

Keeping the types apart lets you:

- See at a glance where each defect came from.
- Filter the defects list by inspection type.
- Produce a report for one inspection type, for example a handover pack for a purchaser.
- Send one combined report that still shows where each defect came from.

WHEN TO USE AN INSPECTION MODE

Turn on the matching mode whenever you are walking the site with a purchaser, the client, the architect, an engineer or the RBS and logging the defects they raise. Turn it off as soon as you go back to your own Builder QA inspections.

6.2 Turning a Mode On and Off

The inspection mode buttons appear in two places:

- On the **Defects** screen, in the button row after **Log Defect**.
- On any **Project page**, between the **Follow-ups** and **Log Defects** buttons.

There are five buttons: **Purchaser**, **Client**, **Architect**, **Engineer** and **RBS**. Builder QA is what you get when no button is lit. Org Admins, Project Admins and Inspectors can use them.

- Tap a button to turn that mode on. The button fills with the mode's colour.
- Tap a different button to switch straight to that mode. Only one mode can be on at a time.
- Tap the lit button again to turn the mode off and go back to Builder QA.

The mode applies to the whole app, not just one project, so it stays on if you move to another project.

Visual indicator when a mode is on:

A bar in the mode's colour appears under the header on every screen. On a phone it reads "[Mode] mode on" with an **Off** button. On larger screens it reads "[Mode] inspection mode is

on" and "All defects logged are flagged as [Mode] items", with a **Turn off** button. The Log Defect button also changes to the mode's colour.

The colours are: Purchaser dark blue, Client dark green, Architect purple, Engineer dark orange and RBS dark teal.

IMPORTANT: THE MODE STAYS ON

An inspection mode is saved on your device. It stays on when you close the app or come back the next day, and only turns off when you turn it off or sign out. Always check for the coloured bar before you start logging, so your own Builder QA defects are not tagged by mistake.

6.3 Logging a Defect in a Mode

Logging works exactly the same in every mode. Single defect mode, Batch Mode and AI voice logging all work as normal. The only difference is the inspection type saved with each defect.

1. Turn on the mode you need (Section 6.2).
2. Check that the coloured bar is showing at the top of the screen.
3. Tap **Log Defect** and lock your location as normal.
4. Fill in the defect details, take photos and pin the floor plan as required.
5. Tap **Log Defect** to save. The defect is tagged with the inspection type that was on.

TIP: BATCH MODE FOR INSPECTION WALKS

Inspections often produce many defects in one apartment or area. Use Batch Mode (Section 5.4) to lock your location once and log several defects against it without choosing the location again each time.

NOTE

The inspection type cannot be changed after a defect is logged, so check the coloured bar before you log.

6.4 Identifying Inspection Types in the App

On defect cards:

Defects logged in an inspection mode show a coloured badge next to the reference in the Defects list: **Purchaser**, **Client**, **Architect**, **Engineer** or **RBS**. Builder QA defects have no badge.

On the defect detail page:

The inspection type is not shown on the defect detail page. Use the badge on the defect card, or the Inspection type filter.

In reports:

Reports show the inspection type for every defect. See Section 6.6.

Subcontractors and workers never see the inspection type. It does not appear in the subcontractor portal, on the worker page or in any email.

6.5 Filtering by Inspection Type

1. Open the **Defects** screen and select your project.
2. Click the **Filters** button.

3. In the **Inspection type** dropdown, choose Builder QA, Purchaser, Client, Architect, Engineer or RBS. The default is All inspection types.
4. Apply the filter.

The filter combines with the other filters, such as Status, Trade, Subcontractor and Building, and carries into PDF Report and Export Excel on the Defects screen.

6.6 Reports by Inspection Type

PDF reports:

From the filtered Defects view, click **PDF Report**, choose your delivery option and click **Generate**. In list reports and the full project report, a small coloured letter appears next to each defect title: P (Purchaser), C (Client), A (Architect), E (Engineer) or R (RBS). Builder QA defects have no letter. A single-defect PDF shows the full badge and an Inspection Type row. When the filter is used, the report's filter line shows the inspection type chosen.

Excel export:

From the filtered Defects view, click **Export Excel**. The spreadsheet has an **Inspection Type** column reading Builder QA, Purchaser, Client, Architect, Engineer or RBS for every row.

Combined reports:

If you do not filter by inspection type, the report includes every type in one document, and each defect keeps its letter or label.

> **TIP: STANDARD HANDOVER WORKFLOW**
> Filter to Inspection type = Purchaser and Status = Open, then generate a PDF report and email it to the purchaser. This gives them a clean, dated, branded list of every outstanding item from their inspection. The same works for the client, architect, engineer or RBS.

6.7 Best Practices

- **Check the bar before you log.** If a coloured bar is showing, every defect you log is tagged with that inspection type.
- **Turn the mode off when you finish.** The mode stays on until you turn it off or sign out, even the next day.
- **Use Batch Mode for inspection walks.** Inspections often produce 10 to 30 defects in one apartment, and Batch Mode keeps the location locked.
- **Filter, then report.** When sending a report to a purchaser, client or consultant, filter to their inspection type first so they receive only their items.
- **Voice logging is faster on site.** Voice logging works the same in every mode.

> **NOTE**
> Inspection modes only affect how new defects are tagged. Subcontractor assignment, worker magic links, closeout, disputes, follow-ups and closure all work the same for every inspection type.

7. Managing Defects

Once defects are logged, they can be managed from the Defects screen. You can filter, sort, reassign, update status, and track progress across your project.

7.1 Defect Status Workflow

Each defect moves through the following status stages:

- Open — newly logged, not yet actioned.
- Subcontractor Closeout — the subcontractor has submitted a worker rectification and marked it complete. Awaiting inspector review.
- Disputed — the builder has moved the defect to disputed for review. Accept & Close or Reject & Send Back options appear.
- Closed — the inspector has accepted the rectification and closed the defect.

7.2 The Defect Detail View

Click any defect card from the Defects list to open the full defect detail view.

Status & Actions

The current status is shown as a badge. Below it are status change buttons:

- Move to Subcontractor Closeout — mark as ready for subcontractor sign-off.
- Move to Closed — close the defect once rectification is accepted.
- Move to Disputed — flag the defect as disputed for further review.

NOTE — ADMIN OVERRIDE

Org Owners and Org Admins can override a defect's status at any time through the status menu on the defect detail page. This means an admin can move a defect directly between any two statuses (for example, from Closed back to Open, or from Open directly to Closed) without going through the normal subcontractor closeout or dispute workflow. Use this power sparingly and only when the standard workflow cannot achieve the correct outcome — for example, to correct a misclassified defect or re-open a closed defect for warranty work.

ADMIN OVERRIDE NEEDS A REASON

The override is now a full-size Admin override control. You must enter a reason ("Reason for the override (required)"), and it needs an internet connection.

At the top right of the defect are three action buttons: Export, Edit, and Delete.

Defect Details Panel

The Details panel shows: Description, Category, Trade, Priority, Location breadcrumb, Subcontractor, Assigned Worker (if a worker has been assigned by the subcontractor), Due Date, Created date and Created By.

Defects logged in an inspection mode show a coloured badge (Purchaser, Client, Architect, Engineer or RBS) next to the reference in the Defects list. Builder QA defects show no badge. The inspection type is not shown on the detail page and cannot be changed after logging. See Section 6.

Photos

All photos attached to the defect are shown in the Photos section. Tap any photo to zoom in. Rectification photos uploaded by the subcontractor worker appear in a separate Rectification Photos section.

7.3 Comments

The Comments section at the bottom of every defect allows all parties to communicate directly on that defect — contractor team, subcontractor foreman, and any workers who have been assigned via magic link.

- Type a comment in the text field and click Post to add it.
- Comments are visible to everyone with access to the defect.
- Comments cannot be edited or deleted once posted.

> **NOTE**
> No email notification is sent when a comment is posted. Check the defect manually to see if a subcontractor or worker has replied.

7.4 Filtering and Sorting

Use the Filters button on the Defects screen to filter by Status, Trade, Category, Priority, Building, Level, Apartment / Area, Subcontractor, Location, Inspection type (Builder QA, Purchaser, Client, Architect, Engineer or RBS), or Due date range. Level and Apartment / Area filters cascade: selecting a Building unlocks Level options for that building, and selecting a Level unlocks Apartment / Area options for that level.

7.5 Disputed Defects

The dispute workflow allows the builder to review subcontractor closeouts and send defects back for further work. See Section 8.6 for the full dispute workflow including worker notifications.

Builder — Reviewing a Subcontractor Closeout:

When a worker marks a defect complete, the status moves to Subcontractor Closeout and both the builder and foreman are notified by email. As the builder:

1. Review the defect, rectification photos, and any worker comments.
2. If the rectification is satisfactory — click Move to Closed to close the defect.
3. If the work needs to be reviewed further — click Move to Disputed.
4. Once in Disputed status, two options appear: Accept & Close (green) or Reject & Send Back (red).

> **FOLLOW-UPS AND MOVE TO DISPUTED**
> On a project using follow-ups, moving a defect to Disputed yourself does not pause follow-up emails. If the item was in Subcontractor Closeout, follow-ups start again. If you want follow-ups held while you review, use Pause follow-ups on the item (Section 12.6).

Builder — Reject & Send Back:

1. Click Reject & Send Back.
2. Enter comments explaining why the work needs to be redone (required).

3. Optionally upload supporting photos or documents as evidence.
4. Click Send Back to Subcontractor.
5. The defect status returns to Open.
6. An email is automatically sent to the subcontractor foreman and the assigned worker with the rejection comments.

> **NOTE**
> Disputed defects appear in your defect list with a Disputed status badge. Use the filter to view all disputed defects across a project so none are missed.

Dispute Evidence — Grouped by Cycle

When a defect has been disputed one or more times, the Dispute Evidence section on the defect detail page groups all evidence by dispute cycle in chronological order. Each cycle shows a heading for when the dispute was raised (with the subcontractor company and date), the dispute reason, and the subcontractor's supporting evidence. If the builder rejected that cycle, a second heading shows who rejected it and when, followed by the builder's rejection reason and any rejection evidence. This makes it clear at a glance which party uploaded which files and when — replacing the earlier flat list of mixed evidence. The same grouped view is visible on both the main app and the subcontractor portal.

7.6 Floor Plan Defect View

The Floor Plan Defect View shows every defect logged on a level as a colour coded pin on that level's floor plan, so you can see the whole level at a glance. It is ideal for walking a floor and checking outstanding work in context.

Opening the view:

1. Open your project and click Manage Buildings & Levels.
2. Find the level you want to view. The view is available on any level that has a floor plan uploaded.
3. Click the green View Defects link (with a map pin icon) on that level.
4. The floor plan opens full screen with every defect on that level shown as a pin.

Pin colours: Each pin is colour coded by the defect's current status, using the same colours shown in Section 4.3b: Open is red, Subcontractor Closeout is teal, Disputed is purple, and Closed is green. Pins change colour automatically as defects move through their statuses.

Filtering by status: Use the status filter to show or hide defects by status, for example to focus on only Open or only Disputed defects on the level.

Opening a defect: Tap any pin to see a summary card for that defect, then tap View Defect to open the full defect detail.

Zoom and pan: Pinch to zoom in and out, use the on screen zoom controls, and drag to move around the plan. Each pin stays the same size as you zoom.

NOTE: The Floor Plan Defect View needs an internet connection to load the defect pins. The floor plan image itself is available offline once the project has been downloaded, but the pins are loaded live, so open this view while online.

8. Subcontractor Portal

The Subcontractor Portal allows subcontractors to receive defect assignments, upload rectification evidence, assign work to their team workers, dispute defects, and communicate with the contractor — all without needing access to the full application.

8.1 Subcontractor Setup & Multi-Project Access

Each subcontractor company has one login account that works across all projects they are invited to, regardless of which builder or organisation invited them.

First Invitation:

When a subcontractor is added to their first project and invited, they receive an email with their login credentials (a temporary password) and a link to the portal. They can change their password after first login from the Profile tab.

Additional Projects:

If the same subcontractor email is added to a second or subsequent project — even by a different builder — the system links them to their existing account. They receive a 'You have been added to a new project' email with a link to the portal and a password reset link in case they need to recover access.

> **NOTE**
> Subcontractors can only see defects assigned to their company. They cannot see other subcontractors' defects, the project dashboard, reports, or any admin functions. When working across multiple projects, they only see defects for the project they have selected.

8.2 Accessing the Portal

The portal is accessed at masterplandefects.com.au/portal using the credentials sent in the invitation email.

Single Project:

If the subcontractor is assigned to only one project, they are taken directly to their defect list after login.

Multiple Projects:

If the subcontractor is assigned to multiple projects, they will see a Project Selector screen after login showing all their projects with:

- Project name and builder/org name.
- Trade they are assigned under.
- Count of open defects on that project.

Tap any project card to enter that project's portal. A back arrow in the header returns them to the project selector at any time.

8.3 Portal Features

- My Defects — view all defects assigned to their company on the selected project. A row of four stat cards at the top shows the count of Open, Closeout, Disputed, and Total defects at a glance.

- Defect detail — view the full defect description, photos, location, due date, reported by, and date.
- Assign to Worker — assign a specific defect to one of their workers (see Section 8.4).
- Rectification Photos — upload photos showing completed rectification work. Uploading a photo automatically moves the defect status to Subcontractor Closeout.
- Dispute Defect — dispute the defect if it is not their responsibility. Enter a reason, optionally upload supporting evidence, and submit.
- Comments — add comments to communicate with the contractor. Comments are visible to all parties.
- Profile — update contact details and change password.
- Every contact listed for the company can log in to the portal.

8.4 Assigning Defects to Workers

The subcontractor foreman or PM can assign individual defects to specific workers on their team. The worker receives a magic link email that gives them direct access to that defect — no login or password required.

Worker Directory:

Workers that have been previously assigned are saved to a worker directory. When assigning a defect:

1. Open the defect in the portal.
2. Tap the Assign to Worker section (visible on Open defects).
3. If previous workers exist — a dropdown appears with all saved workers. Select one to auto-fill their name and email.
4. To add a new worker — select '+ New Worker' from the dropdown (or if no workers exist yet, fill in the Worker Name and Worker Email fields directly).
5. Tap Send Assignment.
6. The worker receives an email with a magic link and the defect details.
7. A confirmation message appears: 'Worker notified by email'.

The assigned worker's name and email are visible on the defect detail page in both the portal and the builder's app, under 'Assigned Worker'.

> **NOTE**
> Workers saved to your directory are specific to your subcontractor account. They are available to select on any defect across all your projects.

8.5 Worker Magic Link

When a worker is assigned a defect, they receive an email with a 'View Defect' button. Clicking this opens a public page that shows:

- Defect reference number, title, and description.
- Project name and location.
- Category, trade, priority, and due date.
- All defect photos logged by the inspector.
- Rectification photo upload — the worker can upload evidence of the completed work directly from their phone.

- Comments — the worker can view all comments and add their own. Comments are visible to the contractor and foreman.
- Mark as Complete button — when the work is done and photos are uploaded, the worker taps this to submit the rectification.
- Before tapping Mark as Complete, the worker must upload a new rectification photo. Workers can delete their own photos before completing.

IMPORTANT — MAGIC LINK EXPIRY
The worker's magic link remains active until the builder closes the defect. If the builder rejects the closeout and sends it back, the worker can still use the same link to view the rejection comments, upload new photos, and resubmit. The link only expires once the builder clicks Accept & Close or Move to Closed.

NOTE — NO LOGIN REQUIRED
Workers access their defect via the magic link only. They do not need to create an account or remember a password. The link is single-defect specific — they can only see the defect they have been assigned.

WARNING — DO NOT DELETE THE MAGIC LINK EMAIL
Workers should keep the magic link email — do not delete it. The same link is used to access the defect again if the builder rejects the closeout and sends it back for further work. If the email is deleted and the defect is rejected, the worker will have no way to access the defect and will need to contact their foreman to be reassigned.

8.6 Worker Closeout & Dispute Flow

The full workflow from subcontractor assignment through to builder acceptance:

Step	Action By	What Happens
1	Builder	Defect logged and assigned to subcontractor company.
2	Subcontractor (Foreman)	Receives defect notification email. Logs into portal.
3	Subcontractor (Foreman)	Opens defect. Clicks Assign to Worker. Selects or adds a worker. Taps Send Assignment. The Builder (defect creator) receives a for-your-awareness email showing the subcontractor company and worker name — no action required.
4	Worker	Receives magic link email with 'View Defect' button. No login required.
5	Worker	Goes to site. Completes the work. Opens magic link. Uploads rectification photo(s).

		Adds comments if needed. Taps Mark as Complete.
6	Builder & Foreman	Both receive 'Worker rectification submitted' email notification with a Review Defect button.
7	Builder	Reviews the defect and rectification photos. Clicks Move to Closed to accept and finalise, or Move to Disputed to open the defect for rejection review. Note: Move to Disputed does not send any email on its own — it reclassifies the defect so the rejection options become available.
8	Builder (if Disputed)	With the defect now in Disputed status, sees Accept & Close (green) or Reject & Send Back (red) buttons. Only pressing Reject & Send Back notifies the Foreman and Worker — the intermediate 'Move to Disputed' status change does not send any email.
9	Builder (if Rejected)	Clicks Reject & Send Back. Enters rejection comments. Optionally adds evidence. Clicks Send Back to Subcontractor.
10	Foreman & Worker	Both receive rejection email with comments and a link back to the defect.
11	Worker	Opens magic link. Reviews rejection comments. Completes additional work. Uploads new photos. Taps Mark as Complete again.
12	Builder	Steps 6–11 repeat until the builder is satisfied and clicks Accept & Close.
13	System	Magic link expires. Defect is Closed.

TIP
The Assigned Worker field on the defect detail page shows the builder who is responsible on site. This helps builders follow up directly with the right person if they need to discuss the rectification work.

8.7 Email Notifications

The following emails are sent automatically by MasterPlan Defects:

Trigger	Recipient	Email Content
Defect created with subcontractor assigned	Subcontractor (foreman)	Defect details, location, priority, due date.
Subcontractor invited to portal (first time)	Subcontractor	Login credentials and portal access link.
Subcontractor added to additional project	Subcontractor	'Added to new project' email with portal link and password reset link.
Defect details edited (not status changes)	Subcontractor	Updated defect details — what changed.
Worker assigned to a defect	Worker	Magic link email with 'View Defect' button and defect details.
Subcontractor assigns a worker to a defect	Builder (defect creator)	For-your-awareness email showing the subcontractor company, worker name, and a link to the defect. No action required.
Worker marks defect complete	Builder (defect creator) & Foreman	'Worker rectification submitted' notification with Review Defect button.
Builder rejects closeout & sends back	Foreman & Worker	Rejection comments and evidence count, with link back to portal / magic link.
Subcontractor disputes a defect	Builder (defect creator)	Dispute reason, evidence count, and Review Dispute button.
Contractor rejects dispute & sends back	Subcontractor (foreman) & Worker	Rejection comments with link to portal and magic link.
Org Admin invites a Project Admin	New Project Admin	Invitation email with account setup link and project details.
Project Admin invites Inspector or Viewer	New Inspector or Viewer	Invitation email with account setup link and project details.
Org Admin invites an Org Admin	New Org Admin	Invitation email with account setup link.
Project deletion approved	Org Owner	Which admin requested deletion and who approved it.

NOTE

No emails are sent for status changes (other than dispute and closeout actions), comments posted, or defect closures. Specifically, 'Move to Disputed' is a silent status change — it reclassifies the defect so the Accept & Close / Reject & Send Back buttons appear, but only pressing Reject & Send Back triggers the rejection email to the Foreman and Worker. Check defects manually for updates or ask your team to notify you directly.

FOLLOW-UP EMAILS

Notifications now go to every contact of a subcontractor company.
Automatic follow-up emails to subcontractors, and the emails builders receive about them, are described in Section 12. Move to Disputed sends no email by itself, but on a project using follow-ups it can restart follow-up emails (see Section 7.5).

9. Reports & Exports

MasterPlan Defects generates professional, branded PDF reports and Excel exports ready to send to clients, principals, and project stakeholders.

9.1 Full Project Report — from the Project Page

From the Projects tab, open a project and click Full Project Report. This generates a comprehensive branded PDF report for that project including all defects, statistics, and a photo appendix.

A Generate PDF Report modal will appear with the following Delivery Options:

- Download to device — saves the PDF directly to your device.
- Email to me — sends the PDF to your account email address.
- Email to others — enter one or more email addresses (comma-separated) and an optional message.
- Save to project reports — saves the report to the Reports tab for future reference.

> **TIP**
> Use Full Project Report from the project page when you need a complete snapshot of the entire project to send to a client or principal.

9.2 Filtered Reports — from the Defects Tab

Step 1 — Select your project:

Use the project dropdown at the top of the Defects screen to select the project you want to report on.

Step 2 — Apply filters:

Click the Filters button to filter by Status, Priority, Trade, Building, Level, Apartment / Area, or Subcontractor. You can also use the search bar. All filters apply to both the PDF and Excel exports.

Step 3 — Generate PDF or Excel:

- PDF Report — click PDF Report. The Generate PDF Report modal shows the number of defects currently shown and the four delivery options.
- Export Excel — click Export Excel. The Generate XLSX Report modal shows the same delivery options.

> **TIP**
> Use filtered reports from the Defects tab when you need to send a specific subset of defects — for example, only open critical defects for a particular subcontractor, or all closed defects for a handover report.

9.3 The Reports Tab

Click Reports in the left sidebar to access all reports saved to the project. From here you can view, download, or re-send any previously saved report.

9.4 Excel Export Fields

The Excel export includes all defect fields: reference number, title, description, location (project, building, level, apartment/location, room), category, trade, subcontractor, priority, status, inspection type (Builder QA, Purchaser, Client, Architect, Engineer or RBS), due date, created date, created by, and closed date.

9.5 Organisation-Wide Data Export

Org Owners and Admins can export all data across all projects at once from Settings > Organisation. Both exports download as Excel spreadsheets:

- Export All Defects — downloads all defects across every project in your organisation, including photos metadata.
- Export Projects Summary — downloads a summary of all projects with defect counts and status.

10. Project Closeout

There is no formal close or archive button in MasterPlan Defects — projects remain active and accessible once created. The following is a recommended procedure to follow when wrapping up a project.

10.1 Recommended Closeout Procedure

Step 1 — Check for outstanding defects:

Go to the Defects tab and use the Filters button to check each status one at a time:

- Open — any defects not yet actioned.
- Subcontractor Closeout — defects where the worker has uploaded evidence but the inspector has not yet reviewed.
- Disputed — any defects currently in a dispute that need resolution.

Step 2 — Resolve all outstanding defects:

Work through any remaining defects with your subcontractors until all are moved to Closed status.

Step 3 — Generate a final Completion Report:

Once all defects are closed, go to the Defects tab, filter by Status = Closed, and click PDF Report to generate a final branded report.

Step 4 — Export a final Excel for your records:

From the same filtered view, click Export Excel to download a complete spreadsheet of all closed defects.

Step 5 — Organisation-wide backup (optional):

Go to Settings > Organisation > Export Data and download Export All Defects and Export Projects Summary as Excel files.

> **NOTE**
> The project remains active and accessible after closeout. All defect data, photos, reports, and floor plans are retained. There is no formal archive or lock step — the project simply stays available for reference.

11. Billing & Subscription

All billing is managed through Settings > Subscription. Only the Org Owner and Org Admins can view and manage billing.

11.1 Plans & Pricing

Feature	Starter	Professional	Enterprise
Monthly Price	AUD $59/month	AUD $129/month	Custom quote
Projects	2	5	Unlimited
Team Members	4	7	Unlimited
Admins	3	4	Unlimited
Defects	Unlimited	Unlimited	Unlimited
PDF Reports	✓	✓	✓
Excel Export	✓	✓	✓
Offline Mode	✓	✓	✓
Floor Plans	✓	✓	✓
Subcontractor Portal	✓	✓	✓
Worker Assignment & Magic Link	✓	✓	✓
White-label Branding	✓	✓	✓
AI Voice Logging	✓	✓	✓
Priority Support	—	✓	✓
Dedicated Account Manager	—	—	✓
Custom Integrations	—	—	✓
Free Trial	30 days	30 days	Contact sales

11.2 Managing Your Subscription

Go to Settings > Subscription. Your Current Plan is shown with an Active badge and your current project and team member limits.

> **NOTE — ACCESS RESTRICTED**
> Billing and subscription management is only available to the Org Owner and Org Admins. Project Admins, Inspectors, Viewers, and Subcontractors do not have access to billing settings.

Click Manage Billing to open the Stripe customer portal to update payment method, view past invoices, and manage subscription details.

Changing Your Plan:

1. From the Billing page, click Change Plan.
2. Each plan card shows the features and pricing.
3. Click Switch Plan on the plan you want.
4. The Stripe portal opens to confirm the plan change.
5. Your new plan limits apply as soon as the change is processed.

> **NOTE**
> All pricing is in AUD and billed monthly, excluding GST. Plan changes take effect immediately and are prorated for the remainder of your billing period.

11.3 Switching Plans

You can upgrade or downgrade your plan at any time from Settings > Subscription. Plan changes work differently depending on the direction.

Upgrading:

6. From Settings > Subscription, click Change Plan, then Switch Plan on the higher plan.
7. The Stripe portal opens to confirm.
8. Your new plan limits apply immediately and you are charged a prorated amount for the rest of your current billing period.

Downgrading:

9. From Settings > Subscription, click Change Plan, then Switch Plan on the lower plan.
10. A confirmation message appears: your plan price won't change until your current billing cycle ends, but reductions in projects, team members, and admins take effect immediately. Click Continue to open the Stripe portal and confirm.
11. If your current usage exceeds the lower plan's limits, the Reduce Usage screen appears first. Select projects to archive, team members to remove, and admins to demote until you fit within the new plan, then submit. The Stripe portal then opens to complete the downgrade.

> **NOTE**
> Reductions are immediate. Your billing continues at the current plan price until the end of the billing cycle, then changes to the new plan price. Switch closer to your renewal date to get the full value of your current plan.

Plan Change Scheduled:

After a downgrade is scheduled, the Settings > Subscription page shows a Plan Change Scheduled banner with the date your billing changes. Until that date:

12. Your project, team member, and admin limits are already at the new plan's levels.
13. Your billing remains at your current plan's price.
14. You can click Undo Plan Change at any time to cancel the scheduled change and stay on your current plan.

Restoring Archived Projects:

If you archived projects during a downgrade and later either undo the plan change or upgrade to a plan with more capacity, a Restore Archived Projects banner appears on Settings > Subscription. The banner shows how many archived projects you have and how many slots are available on your current plan.

15. Click Restore Project (or Restore Projects) to open the restore window.
16. A Choose Carefully warning appears — once restored, projects can only be archived again during a future plan downgrade.
17. Tick the projects you want to restore, up to the number of available slots.
18. Click Restore Selected. The selected projects move back to your active list.

> **NOTE**
> The Restore Archived Projects banner only appears when you have available slots on your current plan AND archived projects to restore. If you are at your plan’s project limit, archive an active project first or upgrade to free up slots.

11.4 Cancelling Your Subscription

1. Go to Settings > Subscription.
2. Click Cancel Subscription.
3. Confirm the cancellation.

Your access continues until the end of your current billing period. After that, your account will be suspended. All data is retained for 30 days after suspension before permanent deletion.

> **NOTE**
> If you cancel during your free trial, you will not be charged. Your data remains accessible until the trial period ends.

11.5 Plan Limits

If you reach your plan's project, team member, or admin limits you will not be able to create additional projects or invite additional team members until you upgrade. Existing projects and users are unaffected. Defects are unlimited on all plans.

- Starter — 2 projects, 4 team members, 3 admins.
- Professional — 5 projects, 7 team members, 4 admins.
- Enterprise — unlimited projects, team members, and admins.

12. Follow-ups

Follow-ups are automatic emails that chase subcontractors about open items on a project. You write the emails once, choose how many days apart they go out, and decide whether each one is sent automatically or held for your approval. Every email sent is kept in the project's Sent record, so you have a full history if there is ever a dispute.

> **NOTE**
> Nothing is emailed to a subcontractor until a reply-to address has been confirmed and a follow-up list has been switched on for the project.

12.1 Who Can Use Follow-ups

Role	What they can do
Org Owner / Admin	All projects. Set up follow-ups, approve, edit, skip and pause them, and print or download the Sent record.
Project Admin	Their own projects. The same as an Org Admin.
Inspector	Their own projects. Can view follow-ups and the Sent record, but cannot change, approve, print or download anything.
Viewer, Subcontractor	Cannot see follow-ups.

On an archived project, follow-ups can be viewed but not changed.

12.2 Opening Follow-ups

Open a project and tap the **Follow-ups** button. An amber number on the button shows how many things need your attention: follow-ups waiting for approval, follow-ups that could not be sent, follow-ups whose result is unknown, and items paused because of an email problem.

The Follow-ups page has five cards, from top to bottom:

- **Awaiting approval:** follow-ups that need you to act (Section 12.7).
- **Sent record:** every follow-up this project has tried to send (Section 12.10).
- **Follow-up settings:** the reply-to address and send time. These apply to every follow-up email sent from this project.
- **Defect follow-ups:** the list used for every category except Incomplete Work.
- **Incomplete works follow-ups:** the list used for the Incomplete Work category.

12.3 Reply-To Address and Send Time

Reply-to address:

When a subcontractor replies to a follow-up email, the reply goes to the project's reply-to address. No follow-ups are sent until that address is confirmed.

1. On the Follow-ups page, go to Follow-up settings.
2. Enter the **Reply-to address**, then enter it again in **Type the address again**.
3. Tap **Save and send confirmation**.
4. Open the email "Please confirm the reply-to address for [project]" and tap **Confirm address**. Then tap Confirm on the page that opens.

The address shows one of four statuses: Not set, Waiting for confirmation, Link expired or Confirmed. The confirmation link works for 7 days. If it expires, tap **Resend confirmation**.

Send time:

Under **When follow-ups go out**, choose the **Send time**: any whole hour from 6am to 4pm, in the project's own time zone. The default is 8am. Follow-ups are sent from the send time onwards, checked every hour, and no sending starts after 4:59pm.

> **NOTE**
> Waiting days are counted as calendar days. A follow-up goes out on the day it falls due, even on a weekend or public holiday.

12.4 Setting Up the Follow-up Lists

Each project has two lists. **Defect follow-ups** covers every category except Incomplete Work. **Incomplete works follow-ups** covers the Incomplete Work category. Each list holds up to 20 follow-up emails, sent one after another.

Adding follow-up emails:

1. Tap **Open** on the list.
2. Tap **Add the first follow-up**. Later emails can be added with Add at the start, Add after this one or Add at the end.
3. Fill in Days to wait, Email subject and Email wording.
4. Tap **Preview email** to check how it looks, then save.

- **Days to wait** (1 to 90): for the first email, counted from when follow-ups start for an item. For later emails, counted from when the previous follow-up goes out.
- **Email subject** (up to 150 characters) and **Email wording** (up to 5,000 characters).
- **Insert buttons** add item details to the email: Company, Project, Item number, Item title, Location, Due date (called Finish-by date on the Incomplete Works list), Days overdue and Portal link. Portal link can only be added to the wording.
- **Send automatically** or **Hold for my approval**. New follow-ups start as Hold for my approval. You can change this after saving.

Preview email uses made-up item details with your real project name. Deleting a follow-up asks you to confirm. Items that have not reached it yet will skip it.

> **TIP: USING DAYS OVERDUE**
> Defect follow-ups start counting from the day a subcontractor is assigned, not from the due date. Days overdue shows 0 until an item is past its due date, so wording such as "now 0 days overdue" can appear in early defect emails. Use Days overdue in later defect follow-ups, or on the Incomplete Works list, which only starts after the finish-by date has passed. The preview always shows 7 days overdue, so it will not show this.

> **WHAT THE SUBCONTRACTOR RECEIVES**
> The email comes from your organisation's name at noreply@masterplandefects.com.au. Every contact of the company gets their own copy. The footer reads "You can reply to this email to contact the project team", and replies go to the project's reply-to address.

Switching a list on:

1. Make sure the reply-to address is confirmed and the list has at least one follow-up email.
2. Tap **Switch on**.
3. Choose which items the list applies to: **Only items from now on** or **Also existing open items**.

Each list shows a badge: On, Off or Held. Held means the list is on but waiting for the reply-to address to be confirmed.

> **NOTE: INCOMPLETE WORK AND "ONLY ITEMS FROM NOW ON"**
> On the Incomplete Works list, Incomplete Work items that are already open are still included once their finish-by date passes.

Switching a list off keeps its follow-up emails, and items are left as they are while it is off. If you switch it on again, you are asked again which items it applies to.

12.5 When Follow-ups Start, Pause and Stop

Follow-ups are prepared once a day, at the project's send time.

- **Defects** start counting from the day a subcontractor company is assigned to the item.
- **Incomplete Work** starts counting from the day after the due date. An Incomplete Work item with no due date is never chased.
- Follow-ups never count from before the list was switched on, or from before the item was last reopened.
- An item with no subcontractor company is never chased.

Event	What happens to follow-ups
Subcontractor marks the item complete (Subcontractor Closeout)	Paused. Any follow-up waiting to go is held. If the item goes back to Open, follow-ups carry on.
Subcontractor disputes the item	Paused, in the same way.
Builder uses Move to Disputed	Does not pause. If the item was in Subcontractor Closeout, follow-ups start again. Use Pause follow-ups (Section 12.6) if you want them held while you review.
Builder uses Reject & Send Back	The pause ends and follow-ups carry on.
Item closed	Follow-ups stop.
Item reopened	Follow-ups start again from Follow-up 1.
Item given to a different company	Follow-ups start again from Follow-up 1.
Company removed from the item	Follow-ups stop.
Category changed between Defect and Incomplete Work	The current follow-ups stop, and the other list starts from that day.
Due date changed (Defects)	No effect on timing.
Due date changed (Incomplete Work)	Before the first follow-up, counting moves to the day after the new date. After that, a later date pauses follow-ups until the day after it, and an earlier date carries on.
Email problem	Paused (Section 12.9).
Project archived, trial ended or subscription suspended	Nothing is sent. Waiting days never count from before the return.

> **NOTE: NO RUSH AFTER A PAUSE**
> A pause holds emails rather than sending them all at once later. After a pause ends, follow-ups carry on from the project's next send time.

NOTE: OTHER REASONS A FOLLOW-UP IS HELD

A follow-up is also held, without appearing on the Awaiting approval page, if the reply-to address is not confirmed, the company has no contact email, the email uses Portal link and the company's main contact has no portal login, or one of its insert fields is blank (for example, Due date on an item with no due date).

12.6 Follow-ups on an Item

Open any item to see its Follow-ups card. It shows the list name, where follow-ups stand (for example "Follow-ups are running for this item"), and progress such as "Follow-up 2 of 4".

Pausing follow-ups on one item:

1. Tap **Pause follow-ups**.
2. Enter a **Reason** (required, up to 500 characters).
3. Choose how long: **Until I resume it**, **For a number of days** or **Until a date** (up to one year).
4. Save.

Use **Change pause** to change it, or **Resume follow-ups** to end it. While an item is in Subcontractor Closeout or disputed by the subcontractor, that pause takes over from yours.

The card also shows **Email problems** (Section 12.9), **Delivery** (one line per person, for example Delivered, Bounced or Marked as spam), **Pause history**, and a **View sent record** link.

12.7 Awaiting Approval

Tap **Awaiting approval** on the Follow-ups page. Each follow-up is shown exactly as it will be emailed. Tap **Show email** to read it. The page has four sections.

Awaiting approval:

- **Approve:** the follow-up is sent at the next hourly send, between the project's send time and 5pm. If the item is paused, it is sent once the hold ends.
- **Edit:** change the subject or wording of this follow-up only. Saving does not approve it. Edit is no longer offered once sending has started.
- **Skip:** it will not be sent, and the item moves on to its next follow-up.

Not sent:

- Follow-ups that nobody received. Each person's line shows why, for example "Not accepted by the email service. Check the address."
- **Try again** sends it at the next hourly send. **Skip** moves the item on.

Result unknown:

- Sending stopped part way through, so some copies may have arrived.
- **Send again** goes only to people who definitely did not get it. A copy that may have arrived is never sent again. **Skip** moves the item on.

Not reaching everyone:

- Items paused because of an email problem, and follow-ups that reached some contacts but not all. Tap **Open item** to deal with it on the item.

NOTE

Only Org Admins and Project Admins can use these buttons. Inspectors can view the page. On an archived project nothing can be changed.

12.8 Emails You Receive

These emails go to the project's reply-to address (once confirmed) and to every Project Admin on the project. Org Admins only receive them if they are also a Project Admin on the project or own the reply-to address.

Email	When it is sent
Follow-ups waiting for approval	At most once a day, during sending hours, when follow-ups need your approval. Includes a Review follow-ups button.
Reminder: still waiting for approval	2 or more days after the first email, at most once a day.
Follow-ups sent late	Once a day, listing follow-ups sent later than their due day. For your records only.
Items paused because of an email problem	At any hour, when a follow-up email bounces, is marked as spam or is blocked. Includes a View email problems button.

12.9 Email Problems

If a follow-up email bounces permanently, is marked as spam, or is blocked by the email service, the item is paused, together with every other item in the project that emails that address. Temporary bounces and delays never pause follow-ups.

The item's Email problems section shows each address, what happened, and the date it was first reported. To fix it, do one of the following:

- Change the contact's email address in Manage Subcontractors. Follow-ups then carry on by themselves.
- Remove that contact from the company.
- Tap **Resume anyway** on the item if you are sure the address is right. This clears the problem for the whole project.

12.10 The Sent Record

The Sent record lists every follow-up email the project has tried to send to a subcontractor, with what happened to each person's copy. Each email is shown exactly as it was sent, 25 per page, newest first. For each follow-up it shows:

- **Status:** Sent, Sent to some of its people, Not sent, Being sent, Result not known, Skipped, Cancelled, On hold or Waiting to be sent again.
- **Who approved, edited or skipped it**, with the wording before and after each edit.
- **Each person's copy**, with its delivery reports and sending attempts.
- **Pause and resume history.**

Use the filters to narrow the list: List, Company, Items (tick up to 100) and Sent from / Sent to. Then tap **Apply filters**.

Printing:

1. Tick **Select to print** on up to 25 follow-ups.
2. Tap **Print selected**.
3. Choose **Print or save as PDF**.

Spreadsheet download:

Tap **Download spreadsheet** to download up to 1,000 follow-ups. The file has two sheets: **Sent emails** (one row per person's copy, with the email as plain text) and **Follow-up history** (approvals, edits, skips, Try again, Send again and pauses).

NOTE

Org Admins, Project Admins and Inspectors can view the Sent record, including on archived projects. Only Org Admins and Project Admins can print or download it.

TIP: IF THERE IS A DISPUTE
The Sent record and its spreadsheet are your record of what was sent, to whom and when. Download the spreadsheet before closing out a project.

12.11 Timer Last Ran

The Follow-ups page shows when the follow-up timer last ran, in the project's time zone. If it has not run for more than 3 hours, an amber warning says follow-ups may go out late until it runs again. You do not need to do anything. Contact support if the warning does not clear.

Quick Reference

Voice Logging Cheat Sheet

Speak one natural sentence covering as many of these as possible:

Element	Example Phrases
Location (Residential)	in apartment 302, level 2 bathroom, Building A kitchen
Location (House / Townhouse)	Townhouse 3 Ground Floor master bedroom, Level 1 ensuite, Driveway
Location (Commercial/Industrial)	Ground Floor Entry Foyer, Level 2 Plant Room, Basement Car Park
What's wrong	cracked render, waterproofing failure, missing skirting board
Category	structural, paintwork, waterproofing, tiling, carpentry
Trade	plastering, painting, waterproofing, tiling, carpentry
Subcontractor	Smith Plastering, Collins Waterproofing (use full name)
Priority	low, medium, high, critical
Due date	due in 7 days, due Friday, due 15 April

Building Type Quick Reference

Building Type	Location Hierarchy	Room/Area Field
Apartment / Residential	Building → Level → Apartment/Area → Room/Area	Shown ✓
House / Townhouse	Building → Level → Room	Shown ✓ (no Apartment)
Commercial	Building → Level → Location	Hidden ×
Institutional	Building → Level → Location	Hidden ×
Industrial	Building → Level → Location	Hidden ×

Support

For help and support, visit masterplandefects.com.au or contact us through the in-app chat assistant.