Facility Management Setup Guide

Start with one asset and one real repair. These suggestions do not change your workspace or permissions.

WORKSPACE
Facility / Client Site

ASSETS
Building / Area / Equipment

TASK NAME Work Order

Roles and responsibilities

Admin Admin	Manages the workspace, users and access.
Manager Facility Manager	Reviews requests and assigns work for the assets they manage.
Technician Technician / Contractor	Completes assigned work and records notes or photos.
Reporter Staff / Site User	Reports issues on Shared assets; does not assign repairs.
Owner Client / Asset Owner, where relevant	Reports issues and follows work on their assigned assets; does not assign repairs.

Workspace settings → Edit: change Owner Titles or Manager, Technician and Reporter naming. Titles are labels, not new permissions.

Private · Shared OFF

Use Shared OFF for an asset restricted to a particular client or Owner. Assign that person as Owner and the responsible Facility Manager.

Shared · Shared ON

Use Shared ON and Reporter access ON for site equipment that staff need to report on. Reporting is for active users in that workspace, not public access.

Access stays within the workspace and each person's assigned scope. Owner is an application role, not a record of legal ownership. Shared is an explicit access setting, not simply a missing Owner.

One repair, five steps

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1 Report › 2 Assign › 3 Repair › 4 Proof › 5 Done

Two QR codes, two purposes

Invite Admins, Managers, Technicians and Owners through Members. Enable Reporter access in Workspace settings and share the workspace QR with authorised reporting users. They sign in and join your workspace. An asset QR identifies the boat, room or equipment when reporting. Only active Reporters in that workspace can report on its Shared assets. Shared does not grant access to everyone else's requests.

Your first 5 minutes

1. Create your workspace.
2. Add one boat, room or item of equipment.
3. Set Shared ON, or leave it OFF and assign an Owner.
4. Invite the team through Members; enable Reporter access if needed.
5. Try one real repair, from report to completion.

Full setup guide

https://assetfix.me/how-to-start/?industry=facility-management

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