Marina Setup Guide

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

WORKSPACE
Marina / Yacht Service / Fleet

ASSETS
Yacht / Tender / Shared Equipment

TASK NAME Job / Repair / Service

Roles and responsibilities

Admin Admin	Manages the workspace, users and access.
Manager Marina Manager / Fleet Manager	Reviews requests and assigns work for the assets they manage.
Technician Marine Technician	Completes assigned work and records notes or photos.
Reporter Dock Crew / Marina Staff	Reports issues on Shared assets; does not assign repairs.
Owner Yacht Owner	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.

Yacht with an Owner

Shared OFF: link the Yacht Owner to their yacht. They see only their own assets and can report issues and follow repair progress. Requests for their yacht can be created by the Owner, Admin or Manager; visibility follows assigned access, not the creator. Previous ownership history is not automatically shared. The Manager assigns; the Technician completes the repair.

Company yacht or yacht without an assigned Owner

A company or charter yacht, tender, fuel pump, tools or shared service equipment: Shared ON and Reporter access ON. Active Dock Crew in the same workspace can report. A Manager reviews and assigns; a Technician repairs, adds notes/photos and marks the job done. No Owner assignment is needed.

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 **Add notes/photos** › 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=marinas

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