Workshop Setup Guide

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

WORKSPACE
Workshop / Service Centre

ASSETS
Vehicle / Machine / Tool / Equipment

TASK NAME Work Order

Roles and responsibilities

Admin Admin	Manages the workspace, users and access.
Manager Workshop Manager	Reviews requests and assigns work for the assets they manage.
Technician Mechanic / Technician	Completes assigned work and records notes or photos.
Reporter Service Advisor / Workshop Staff	Reports issues on Shared assets; does not assign repairs.
Owner Vehicle Owner / Customer, 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

For a customer's vehicle or machine, use Shared OFF and link the customer as Owner when they need to report issues and follow their work.

Shared · Shared ON

For workshop tools and equipment, enable Shared and Reporter access. Staff report faults; the responsible Workshop Manager assigns repairs.

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

Workshop · AssetFix.me

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=workshops

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