



COMPLETE GUIDE · JUNE 2026

Aquator Help Center

The complete operating manual for Aquator Marine — every module, setting and workflow, from PMS, ISM, SMS, Crew, Charter and Accounting through fleet management, settings and support.

27

CHAPTERS

134

SECTIONS

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EDITION





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01

GETTING STARTED 8 SECTIONS

Welcome to Aquator

Aquator Marine is an all-in-one platform for running a yacht or a whole fleet — from accounts, crew and maintenance to safety, charters and documents, in one place. This guide walks you through your first steps, from choosing how to start through to opening your first module.

What you can do with Aquator

The platform is organised into modules, each with its own guide. The main groups you'll see in the sidebar are:

- **Company** — your dashboard and company profile.
- **Fleet** — yachts, AIS Tracker and SMS.
- **Operations** — Management, Smart Documents, Shipyard ERP, Team, Accounting, File Manager, Reports and Integrations.
- **Admin Console** — Company, Yacht, Users and Billing settings.

Who it's for

Aquator is built for everyone involved in running a vessel — owners and family offices who need oversight, yacht and fleet managers, captains and heads of department who run day-to-day operations, shipyards handling refits and builds, and crew who log work and check in. What each person can see and do is controlled by their **role** (see **Add your team**).

Two ways to get started

How you begin depends on the size of your operation:

IF YOU ARE...	HOW TO START
A single yacht or superyacht	Sign up online and start a 14-day free trial — see Create your account .
A fleet, management company, shipyard or family office	Book a demo and our team builds a plan around the modules you need — see Book a demo .

NOT SURE WHICH FITS?

If you run more than one vessel, or need custom modules, integrations or onboarding support, the **demo** route is for you — Business (fleet) plans are priced by conversation, not off a fixed list. Single-vessel owners and captains can simply sign up and try Aquator free.



Create your account

For a single yacht or superyacht you can set everything up yourself: sign up, verify your email, add your details, and start a free trial. Your account is then reviewed by our team before you can log in.

RUNNING A FLEET?

Multi-vessel, management-company, shipyard and family-office (Business) plans aren't self-serve — head to **Book a demo** instead and we'll set you up.

Sign up

1. Open the **Get Started** page and click **Continue**.
2. **Account** — enter your name, email and password (or continue with Google / Apple), then click **Continue**.
3. **Verify Email** — type the 6-digit code we email you and click **Verify**. Use **Resend** if it doesn't arrive.
4. **Profile** — add your vessel, role and company details, then click **Next**.
5. **Plan** — choose **Get Started Free** for the free Starter plan, or **Start 14-Day Free Trial** for a paid plan.

Email verification & approval

WHY YOU CAN'T LOG IN STRAIGHT AWAY

After sign-up you're taken to the **Login** page, but access is granted only after our admin team reviews and approves your account — **typically within 24 hours** on business days. You'll get a confirmation email once it's approved.

If you haven't received an approval email after 24 hours, contact info@aquatormarine.com.

FAQs

Q How does the registration and approval process work?

Once you complete registration, your account is submitted for verification. Our admin team reviews your details and approves your account, usually within 24 hours. You'll receive a confirmation email, and only then can you log in.

Q Why can't I log in after registering?

Access is granted only after your account has been reviewed and approved. Allow up to 24 hours; if it's been longer, email info@aquatormarine.com.

More detail in the [Account & Registration](#) guide.

Book a demo (fleet & enterprise)

If you run a fleet or multiple vessels, a management company, a shipyard or a family office, you don't sign up online — you book a demo and we tailor a plan to the modules you actually need. Business plans are priced by conversation, not off a fixed list.

Why fleet customers start with a demo

- **You choose the modules.** Business plans are custom-quoted around your fleet size, the modules you want, and any integrations — with no per-vessel surprises.
- **You see it first.** The demo is a personalised walkthrough tailored to your operation, showing the modules in action — crew, compliance, finance and more.
- **You get guided onboarding.** Enterprise plans include a dedicated account manager, technical support, and help migrating your data and configuring the platform before go-live.

Book your demo

1. Go to aquatormarine.com and click **Book a demo** (or **Contact Sales**).
2. Tell us your **Company Type** — Yacht Owner, Fleet Manager, Shipyard, Charter Company, Brokerage, Captain, Crew or Other.
3. Select your **Number of Vessels** — 1, 2–5, 6–20 or 20+.
4. Pick your **Primary Interest** — Full Platform, a Specific Module, AI Solutions, Custom Development or Third-Party API Integrations.
5. Submit. **Our team will reach out within one business day** to schedule your walkthrough.

WHICH BUSINESS PLAN?

Business plans come in three shapes: **Fleet Management** (yacht managers and charter operators), **Refit & Project** (shipyards and refit operations) and **Owner Oversight** (family offices and private wealth). Your account manager helps you pick the right fit during the demo.

Just one vessel?

If you only run a single yacht or superyacht, you don't need a demo — you can sign up and start a free trial straight away. See **Create your account**.

FAQs

Q Can I just sign up for a fleet / Business plan online?

No — fleet and Business plans are custom-built around your modules and vessel count, so they're arranged with our team. Book a demo and we'll quote and set up the right plan for you.

Q Do you offer a demo before I commit?

Yes. Every fleet and enterprise enquiry starts with a personalised walkthrough of the platform, tailored to your operation. Request one at aquatormarine.com and we'll be in touch within one business day.

Q How soon will someone contact me?

Within **one business day** of submitting the demo form. For anything urgent, email info@aquatormarine.com.

First login & layout

Once your account is set up, log in and get your bearings. The sidebar is how you move around; the Applications launcher is how you jump between tools.

Log in

1. Open the **Login** page and enter the email and password you registered with (or use Google / Apple).
2. Click **Sign In**. You'll land on your **Dashboard**.

The left sidebar

Everything is reached from the left sidebar, grouped into four areas:

GROUP	WHAT'S INSIDE
Company	Dashboard and Profile.
Fleet	Yachts, AIS Tracker, SMS.
Operations	Management, Smart Documents, Shipyard ERP, Team, Accounting, File Manager, Reports, Integrations.
Admin Console	Company, Yacht, Users, Billing.

DON'T SEE SOMETHING?

What appears in your sidebar depends on your **role** and your **plan**. If a module is missing, your role may not have access to it, or it may not be part of your subscription — see **Add your team** and **Plans & billing**.

The Applications launcher

From **Home** → **Applications** you can open individual tools directly (for example the **In/Out Board**). It's a quick way to jump to a specific app without hunting through the sidebar.

Set up your yacht

Before you start logging work and money against a vessel, add the yacht and set its primary currency. This only takes a few minutes and unlocks the rest of the platform.

Add your yacht

1. In the left sidebar, open **Admin Console**.
2. Click **Yacht** and add the vessel's details (name, type, length and so on).
3. Save. The yacht becomes available across the Fleet and Operations modules.

Set your primary currency

DO THIS EARLY

You can't create accounting transactions until a **Primary Currency** is set for the yacht, and every report is shown in that currency. Set it now to avoid a "Primary Currency Required" message later.

1. Go to **Admin Console** → **Settings** → **Currencies**.
2. Choose your **Primary Currency** and save.

Amounts entered in other currencies are converted to your primary currency using the FX rate.

FAQs

Q Why does it say "Primary Currency Required" when I add a transaction?

No primary currency is configured yet. Go to **Admin Console** → **Settings** → **Currencies**, set one, then return to Accounting.



Add your team

Give your colleagues access by creating roles, then inviting people and assigning each a role. Always create the role first — you can't invite someone without one.

1. Create a role

ROLES ARE ACCOUNT-SCOPED

Each role belongs to a single **Account**. A role created under one account won't appear under another — if a user's access looks wrong, the role was often created under the wrong account.

1. Go to **Admin Console** → **Users** → **Roles** and click **Add Role**.
2. Enter a **Role Name** and choose the **Account**.
3. Set permissions with the **View / Edit / Delete** toggles for each area, then click **Save**.

2. Invite a user

1. Go to **Admin Console** → **Users** → **Invite User**.
2. Fill in **First Name**, **Last Name** and **Email**.
3. Choose a **Role** from the dropdown (only existing roles appear).
4. Turn on **Send Email** and click **Add**. You can queue several people, then send all invitations together.

Invited people then appear on the **Users** tab, where you can change roles and status inline.

Full detail in the [User Management](#) guide.

Plans & billing

Aquator has plans for every size of operation. Single-vessel plans are self-serve with a free trial; fleet plans are arranged with our team.

The plan families

- **Yacht Plans** — for yachts under 50m: Starter (free), Essential, Advanced and Pro. Sign up online.
- **Superyacht Plans** — for larger vessels (24m and above): Alpha through Foxtrot, priced per vessel by length. Sign up online (the largest, Foxtrot, is custom-quoted — contact sales).
- **Business Plans** — for fleets, management companies, shipyards and family offices: custom-quoted around your modules and vessel count. **Book a demo / Get in touch** (see **Book a demo**).

Start your free trial

On self-serve plans, click **Start 14-Day Free Trial** at sign-up (or on a plan card in Billing) and confirm. You get full access to your plan's features for 14 days — no credit card required — and you're never charged automatically.

Subscribe to a plan

1. In the left sidebar, open **Admin Console → Billing** (the **Subscription** tab).
2. Click your plan to open its details, review what's included, then click **Proceed to Checkout**.
3. Choose a saved card or add a payment method, then click **Subscribe**. For custom-priced (Business / fleet) plans you'll see **Get in touch** instead — that routes you to our team.

GOOD TO KNOW

Billing has three tabs: **Subscription** (your plan, payment methods and cancellation), **History** (a timeline of changes) and **Invoices** (downloadable PDFs).

For billing cycles and managing add-ons, see the [Yacht Plans & Subscription](#) guide.



Explore the modules

With your account, yacht and team set up, you're ready to dive into the tools. Each module has its own step-by-step guide — here's where to go next.

Module guides

MODULE	WHAT IT'S FOR
Accounting	Budgets, categories, budget vs actual, and transactions.
Crew Management	Personal info, employment & SEA, and payroll.
PMS	Planned maintenance: logs, tasks, purchase orders, equipment, inventory.
Technical Management	Track defects and compliance items as work orders, pinned to the GA drawings.
Yacht Management	Manage vessel data and day-to-day operations.
In/Out Board	Track who is on or off the yacht.
AIS Tracker	Live vessel positions and tracking.
ISM / SMS	Safety management and compliance.
Charter	Manage charters end to end.
Smart Documents / File Manager	Create, store and manage documents and files.
Warranty / Refits / New Builds / Shipyard	Track defects, refit and build projects, and shipyard work.
User Management	Roles, permissions and user records.

Still need a hand?

Use the search box on the [Help Center home](#) to find any topic fast, or email info@aquatormarine.com and our team will help.



Introduction

PMS (Planned Maintenance System) keeps your equipment healthy — it ties together meter readings, scheduled and triggered maintenance, parts stock and purchasing.

What's inside

Five linked areas, each under **PMS**:

- **Logs** — meter readings (running hours, RPM, temperature...).
- **Tasks** — the work to be done, one-off or recurring.
- **Purchase Orders** — buying parts from suppliers.
- **Equipment** — the assets you maintain.
- **Inventory** — parts and spares in stock.

How the areas connect

- Log readings can **auto-create Tasks** (via triggers) and drive **Usage-based** task scheduling.
- **Purchase Orders restock Inventory** when you fulfill them; **completing a Task** with parts draws stock back down.
- **Equipment** links its Logs, Storage and Suppliers in one place.

The same on every screen

- Top-right controls: **Filters**, two view toggles, **Search**, **Export** and **Add**.
- Each row's **Actions** (three-dot) menu: **View**, **Edit**, **Delete**.
- Add/Edit forms accept **Images / Files** by drag & drop (PNG, JPG, PDF, DOC, XLS — max 100 MB).

Access & what you can see

- Access is granted per area as **view**, **edit** or **delete**. If **Add**, **Edit** or an action looks greyed out, you don't have that level.
- Without full access to **Tasks**, you only see tasks **assigned to you** — not the whole list.

FAQs

Q How do I export a PMS list?

On any PMS list page, click **Export**. The dropdown offers the relevant report (e.g. "Inventory Report") with a **PDF** icon and an **Excel**/spreadsheet icon — pick the format you need.

Q How do I generate a QR or barcode?

On the Add/Edit form for **Equipment** or **Inventory**, type your own value into the **QR code / Bar code** field, or click **Generate Code** beneath it. The rendered QR image then appears on the item's View page.

Logs

Logs are your meter reading points — running hours, RPM, temperature, cycles. Record readings here, and let them drive maintenance automatically.

Where to find it: PMS → Logs.

Before you start

The **Equipment** a log attaches to must exist (you pick it on the form). Create it under **PMS → Equipment** first if it's missing.

Add a log (reading meter)

1. Go to **PMS → Logs** and click **Add**.
2. Enter the **ID** and **Name**.
3. Choose a **Measurement Unit** (e.g. Hours, RPM, Cycles, Celsius, Liters).
4. (Optional) add a **Description**.
5. Set the **Reading Frequency** — None, Hour, Day, Week, Month or Year. This is how often a reading is *expected*, not a maintenance schedule, and it doesn't send reminders.
6. Select the **Equipment** this log belongs to. (Optional) attach files.
7. Click **Save**.

WHAT HAPPENS NEXT

The log appears with its Name, ID, Unit, Equipment, Frequency and Last Reading. New logs show no reading until you record one.

Record a reading

1. Go to **PMS → Logs** and open the log (Actions → **View**, or click the row).
2. On the **Details** tab, click **Record Reading**.
3. Enter the value under **Submit New Log Reading**. (Optional) attach files.
4. Click **Confirm Reading**.

WHAT HAPPENS NEXT

The **Last Reading Value** updates on Details and in the list, and the entry is saved to the **Reading History** tab. If a Task Trigger's condition is now met, a **Task is generated automatically**.

Set up a task trigger

1. Open the log → **View**.
2. Under **Task Triggers**, click **New Task Trigger**.
3. In **When Log Reading**, choose the condition: is above, is below, is equal to, is increases by, or is decreases by.
4. Enter the **Value** (threshold or change amount).



5. Fill the task template that fires: ID, Title, Assign To, Priority, Storage, Categories, Suppliers, Equipment, Description. (Optional) Add Part and attach files.
6. Click **Save**.

How task triggers work

A trigger lives on a log and generates a Task when a reading meets its condition. The conditions come in two families:

CONDITION	COMPARES AGAINST	USE IT FOR
is above / is below / is equal to	a fixed Value	thresholds — “inspect when oil temp is above 90°C”
is increases by / is decreases by	the change since the last reading	usage intervals — “service each time hours increase by 250”

When a trigger fires, the Task is built from the template you defined (Title, Assign To, Priority, Equipment, Parts...), so it lands in Tasks already populated.

Troubleshooting & FAQs

- **Equipment dropdown is empty** — no equipment exists yet; add it under PMS → Equipment first.
- **Frequency shows “None”** — that’s the default; the log won’t prompt for readings on a schedule until you change it.
- **I corrected a reading but nothing changed** — editing or deleting a reading doesn’t re-fire triggers or recompute usage-based tasks. Triggers only evaluate when a *new* reading is recorded.

Q Why didn’t my log reading create a task?

A task is only generated if the log has a **Task Trigger** and the new reading satisfies its condition. Open the log → View → **Task Triggers** to confirm one exists and that your value crosses its threshold (or change amount). No trigger means no automatic task.



Tasks

Tasks are the work to be done — inspections, services, jobs. They can be one-off or recurring, assigned, prioritized, and linked to equipment and parts.

Where to find it: PMS → Tasks.

Create a task

1. Go to **PMS → Tasks** and click **Add**.
2. Enter **ID** and **Title**.
3. Set **Job Category**, **Job Type** and **Department**.
4. Add a **Description**, and optionally break the work down with **Add Sub Task**.
5. Set **Assign To** and **Priority**.
6. Link **Equipment**, **Suppliers**, **Categories** and **Storage → Primary** as needed.
7. Set a **Due Date** (date + time).
8. Choose a **Frequency**: One Off, Time, Usage, or Time & Usage.
9. (Optional) Add Part and attach files. Click **Save**.

WHAT HAPPENS NEXT

The task appears with its status (defaulting to **Open**), Priority, Assignee, Due Date and Frequency.

How task frequency works

FREQUENCY	HOW IT RECURS
One Off	A single task, no repetition.
Time	Repeats on a calendar basis (due date + a time interval).
Usage	Repeats based on equipment use measured through Log readings (e.g. running hours) — tied to a meter, not the calendar.
Time & Usage	Both — comes due whenever either interval is reached first (“every 6 months or every 500 hours, whichever comes sooner”).

Choosing **Usage** or **Time & Usage** is what links a task to the Logs system — the readings you record drive when the next instance becomes due.

Update a task’s status

1. Go to **PMS → Tasks**.
2. In the **Status** column, click the status chevron on the task’s row.
3. Choose: **Open**, **On Hold**, **In Progress**, **Completed** or **Postponed** — it updates inline immediately.

What completing a task does

Marking a task **Completed** has two automatic effects beyond changing the status:



- **Parts are drawn from Inventory.** Any Parts on the task are deducted from stock when you complete it. Reopening the task (Completed → any other status) **puts the parts back**.
- **Recurring tasks spawn the next occurrence.** For a Time, Usage or Time & Usage task, completing it automatically creates the next instance in **Tasks** — that's when the next one appears.

GOOD TO KNOW

Stock isn't physically removed until completion, but an **open** task's parts already reduce each item's **Available Quantity** in Inventory — see **Inventory**.

Events — group & run tasks

An **Event** bundles multiple tasks (e.g. "Charter preparation — 2 tasks") so they can be reused and applied together rather than created one by one.

1. Go to **PMS → Tasks** and click **Events** (top right).
2. In the Events panel ("All Events"), click **Create** to make a new event, or use the row icons to **run** (play), **edit** or **delete** one.

Troubleshooting

- **Tasks list says "No Rows To Show"** — the list loads against the active view/filters; clear filters or reload, and existing tasks reappear.
- **I can only see some tasks** — without full access to Tasks you only see tasks assigned to you.

Purchase Orders

Purchase Orders track what you order from suppliers — and restock Inventory when the goods arrive.

Where to find it: PMS → Purchase Orders.

Before you start

The **Supplier** and any catalogued **Items / Parts** should exist so you can select them.

Create a purchase order

1. Go to **PMS → Purchase Orders** and click **Add**.
2. Enter the **PO Title**. The **PO Number** is auto-generated (e.g. PO-06-2026-0001); add a **Reference** if needed.
3. Select the **Supplier**.
4. For each line, set **Item Name**, **Part Number**, **Quantity** and **Cost** — the **Amount** calculates automatically. Use **Add an item** for more lines.
5. (Optional) click **Add taxes and cost** to adjust the Subtotal/Total.
6. Fill delivery details: Shipping Address, Consign To, Contact Name/Email/Phone, Billing Address (or tick **Use the same Shipping and Billing Address**), Start Date, Delivery Date, Delivery Instructions.
7. (Optional) add a **Note** and **Invoice Note** (you can **Set as default**), and attach files. Click **Save**.

WHAT HAPPENS NEXT

The PO appears as **Pending**, with its Supplier, Delivery Date and Total.

The purchase order lifecycle

A PO is **status-driven** — the button you see depends on where it is:

STATUS	WHAT YOU CAN DO
Pending	Approve Purchase Order — it must be approved before it can be received.
Approved	Fulfill — record what arrived (see below).
Partially Fulfilled	Fulfill again, or mark Completed .
Completed	Closed — it can no longer be edited.

- You can't Fulfill a **Pending** PO — approve it first.
- Fulfilling sets the PO to **Partially Fulfilled** (even if everything arrived); you mark it **Completed** yourself when you're done — nothing forces you to receive the full quantity first.
- Once a line has been partially received its fields lock, and once the PO is **Completed** it can't be edited.

Fulfill (restock) a purchase order

1. Open the PO → **View**.
2. Click **Fulfill** (available once the PO is **Approved**).



3. In the **Restock Items** dialog, enter **Units Received** for each item (the Price and Total update as you do).
4. Click **Confirm Restock**.

How purchase orders restock inventory

A PO records what you ordered (**Units Ordered, Unit Cost**). When goods arrive, **Fulfill** → enter **Units Received** per line → **Confirm Restock** does two things:

- It **records receipt against the PO** — the detail then shows Units Received and Cost of Units Received alongside the ordered figures.
- It **adds the received quantities into Inventory** stock.

Because receiving is entered per line, **partial deliveries are supported** — record only what actually arrived, and the PO reflects the shortfall.

Troubleshooting & FAQs

- **There's no Fulfill button** — the PO is still **Pending**; approve it first.
- **Total shows \$0.00** — no line items have a Quantity and Cost yet, or taxes/costs haven't been added.
- **Received fewer than ordered** — enter the actual quantity received; the PO records partial fulfillment rather than the full ordered amount.

Q Can I receive only part of a purchase order?

Yes. Click **Fulfill** and enter the actual **Units Received** per line (less than Units Ordered is fine), then **Confirm Restock**. The PO records the received amount and inventory increases only by what arrived.

Q Does a purchase order show up in Accounting?

No. PMS Purchase Orders aren't linked to the Accounting module — approving or fulfilling one doesn't create an expense or transaction there. They only update PMS **Inventory**.

Equipment

Equipment is the register of assets you maintain — engines, pumps, generators — with identifiers, classification flags, and linked logs, parts and suppliers.

Where to find it: PMS → Equipment.

Add equipment

1. Go to **PMS → Equipment** and click **Add**.
2. Enter **ID**, **Name**, **Categories** and a **Description**.
3. Add identifiers: **Serial Number**, **Model**, **Manufacturer**, **Year**.
4. Set a **QR code** and **Bar code** — type your own or click **Generate Code** beside each.
5. Link **Suppliers** and **Parts**.
6. (Optional) set **Parent Equipment** (to nest this asset under another), **Class Equipment**, **Critical Equipment** and **Owners Critical** flags.
7. Set **Storage → Primary** and attach files. Click **Save**.

WHAT HAPPENS NEXT

The equipment appears in the list (Name, ID, Suppliers, Serial Number, Model, Class, Critical, Owners). Its **View** page shows linked Logs, the rendered QR code, Storage, Suppliers and a **History** tab.

How class & critical flags work

Classification flags drive how an asset is treated, badged and filtered:

- **Class vs Non-Class** — whether the item is subject to classification-society oversight.
- **Critical vs Non-Critical** — operational criticality for safety / propulsion.
- **Owners Critical vs Non-Owners Critical** — items the owner has flagged as important.

These appear as coloured badges and let you filter equipment and work orders. They're **organisational only** — they don't enforce any maintenance schedule or safety rule on their own. Equipment can also be **nested** via **Parent Equipment** (e.g. a pump under an engine). Each record links its Logs, Storage and Suppliers in one place, plus a History tab for its record over time.

FAQs

Q How do I generate a QR or barcode for equipment?

On the Add/Edit form, type your own value into the **QR code / Bar code** field, or click **Generate Code** beneath it. The rendered QR image is then visible on the item's View page.

Q Why can't I delete this equipment (or a part, category or storage location)?

PMS blocks deleting anything still referenced by a task. If an item, category or storage location is used on any work order you'll see "...because it has X workorders related." Remove it from those tasks first, then delete.

Inventory

Inventory is your parts and spares stock — quantities on hand, costs, low-stock thresholds, and where each item is stored.

Where to find it: PMS → Inventory.

Add an inventory item

1. Go to **PMS → Inventory** and click **Add**.
2. Enter **ID**, **Name** and **Categories**.
3. Set **Units in Stock**, **Unit Cost** and **Minimum in Stock** (your low-stock threshold).
4. Add a **Description**, **Part Number**, **Serial Number**, **Manufacturer** and **Area**.
5. Set a **QR code / Bar code** (or **Generate Code**).
6. Set **Storage → Primary** and link a supplier with **Add Supplier**.
7. Attach files and click **Save**.

WHAT HAPPENS NEXT

The item appears showing **Stock**, **Available Quantity** and **Cost**. If Stock falls to or below **Minimum in Stock**, the Stock value is highlighted **RED** as a low-stock warning (a flag only — it doesn't send alerts or auto-reorder).

How stock vs. available quantity works

Each item shows both **Stock** and **Available Quantity**, and they aren't always the same:

- **Stock** — the physical units on hand.
- **Available Quantity** — what's free to use after the parts on **open tasks** (any task not yet Completed) are subtracted. *Purchase-order lines don't reserve stock — only open tasks do.* So you may see Stock 8 but Available 7, or even a **negative** Available when commitments exceed what's on hand.

Minimum in Stock is the low-stock threshold — when Stock reaches or drops below it, the figure is flagged red so you can reorder. A negative Stock or Available figure signals consumption recorded beyond what was received, and should be reconciled with a restock.

WHAT MOVES STOCK

Stock goes **up** when you **Fulfill** a Purchase Order, and **down** when you **Complete** a task that has Parts (reopening the task adds them back). See **Purchase Orders** and **Tasks**.

FAQs

Q What's the difference between Stock and Available Quantity?

Stock is the physical units on hand; **Available Quantity** is what's left after the parts on **open tasks** are reserved. They differ when stock is committed to a task that hasn't been completed, and Available can go negative if commitments exceed what's on hand. Purchase-order lines don't reserve stock.



03 TECHNICAL MANAGEMENT 3 SECTIONS

Introduction

Technical Management is where a defect, job or observation on the vessel becomes a **tracked work item** — and where you pin it to the exact spot on the yacht's **General Arrangement (GA) drawings**.

What's inside

Two linked areas, both under **Technical Management** in the sidebar:

- **Work List** — every defect, compliance item and redline as a trackable work item, with status, priority, deck and dates.
- **Editor** — the yacht's GA (General Arrangement) drawings, with pins and mark-ups linked back to those work items.

GOOD TO KNOW

A **Technical Dashboard** also lives under Technical Management, giving an at-a-glance summary of open items — this guide covers Work List and the Editor.

How the areas connect

- Dropping a **pin** in the Editor **creates a Work List item** tied to that deck and location.
- A work item's **Layer** (Defects, Maintenance, Equipment, Compliance, Redlines) sets which coloured layer it lives on in the drawing.
- Hiding a layer in the Editor hides its pins; a pin's **status and priority** stay in step with the Work List row, either way you edit them.

The same on every screen

- Top-right controls: **Filters**, view toggle (**List / Board / Gantt Chart / Calendar**), **Search**, **Export** and **Add**.
- Each row's **Actions** (three-dot) menu: **View**, **Edit**, **Delete** — Delete is hidden once an item reaches a final status (Completed / Cancelled).
- Selecting rows with the checkbox opens a bulk bar to **Mark In Progress**, **Mark Completed** or **Defer** several items at once.

DIFFERENT FROM OTHER MODULES

Unlike PMS, ISM and most other modules, the Work List's Add/Edit form does **not** accept file attachments — there's no drag-and-drop upload on the item form itself. Drawings are uploaded separately, in the **Editor** → **Manage Images**.

Access & what you can see

- Access is granted per area as **view**, **edit** or **delete**. On a row's Actions menu, **Edit** and **Delete** grey out without that level.
- Without full access to the Work List, you only see items **assigned to you** — not the whole register.





FAQs

Q What's the difference between a Type and a Layer?

Type classifies the work (Defect, Maintenance, Equipment, Compliance, Redline). **Layer** is the drawing layer it sits on in the Editor (Defects, Maintenance, Equipment, Compliance, Redlines) and drives its pin colour. They're set independently on the same form.

Q Do pins and work items stay in sync?

Yes — a pin *is* a work item shown on a drawing. Edit it from either side and the change is reflected in the other; delete the item and its pin goes with it.

Work List

The **Work List** is the register of every technical work item on the vessel — defects, maintenance, compliance items and redlines — each with a status, priority, deck and dates.

Where to find it: **Technical Management → Work List**.

Before you start

Decks and layers come from the vessel's GA drawings in the **Editor**. A work item can reference a deck once at least one drawing exists — but you can log an item without one and pin it later from the Editor.

Add a work item

1. Go to **Technical Management → Work List** and click **Add** (top right).
2. In the **Add Work List** form, enter a **Title** (required, up to 100 characters) and, optionally, a **Description**.
3. Choose the **Type** (Defect, Maintenance, Equipment, Compliance, Redline) and **Layer** (Defects, Maintenance, Equipment, Compliance, Redlines).
4. Set the **Priority** (Critical, High, Medium, Low) and **Status** (Draft, Open, In Progress, Pending Parts, Pending Inspection, Completed, Deferred, Cancelled).
5. (Optional) set **Assigned to**, **How found** (Routine Inspection, Owner Report, Surveyor, Class, Crew Report), **Category**, **Date reported**, **Due date**, **Est. parts cost** / **Est. labour cost**, **Zone / Area**, and the **Safety risk / Class related** checkboxes.
6. Click **Create Item**.

WHAT HAPPENS NEXT

The item opens on its own page with **Details**, **History** and **Comments** tabs, and appears at the top of the Work List. The History tab logs who created it and when.

NO ATTACHMENTS HERE

The Add/Edit form has no file-upload field. To attach a drawing to an item, place or open its pin in the **Editor** instead.

Change status or priority inline

1. In the list, click the **Status** or **Priority** chevron on a row.
2. Pick a new value from the drop-down.

WHAT HAPPENS NEXT

The change saves immediately — no need to open the item — and holds after a refresh.

Bulk actions

Tick the checkbox on one or more rows and a bar appears above the list showing “**{n} selected**” with:

- **Mark In Progress** — sets every selected item's status to In Progress.

- **Mark Completed** — sets every selected item's status to Completed.
- **Defer** — sets every selected item's status to Deferred.
- **Clear** — deselects all rows without changing anything.

Edit or delete an item

1. On a row, open **Actions** (three-dot) → **Edit** to change any field, then **Save Changes**.
2. Or choose **Delete** and confirm on the **Delete item** dialog.

HEADS UP

Delete is permanent — the confirmation reads "Delete '{title}'? This cannot be undone." Delete is also hidden on items that are already Completed or Cancelled.

Switch views

Use the **view toggle** (top-right) to see the same items as a:

- **List** — the full grid with sortable, hide-able columns.
- **Board** — a kanban grouped by status (Open, In Progress, Pending Parts, Pending Inspection, Completed, Deferred).
- **Gantt Chart** — items across a timeline.
- **Calendar** — items by date.

Find, filter & export

- **Search** by title from the top bar.
- **Filters** by Status, Priority, Type, Layer, Assigned To, Category, Tags, **Has GA Pin**, Recurring, Due Date and Date Reported — combine several, then **Clear All** to reset.
- **Save View** keeps a filtered/sorted set as an *Active View* you can return to.
- **Export** → **Work List Report** → **Choose Report Columns** lets you pick which columns to include, then export as **PDF** or **Excel**.

Comments & history

On any item, use the **Comments** tab (type a note, click **Post**) to discuss it with the crew, and the **History** tab for a time-stamped audit trail of changes. Each shows "No comments yet" / "No history yet" until there's something to show.

Troubleshooting & FAQs

- **A row shows a pin icon** — hover it ("View on Editor") or click it to jump straight to that pin on the GA drawing.
- **List says "No Rows To Show"** — the list loads against the active view/filters; clear filters or reload.

Q Can I hide or reorder columns?

Yes — open a column's three-dot menu and use **Hide column**, **Pin to left / right** or **Manage columns** to toggle any column back on.



Q How do I filter to only pinned items?

Open **Filters** and switch on **Has GA Pin**.

Editor

The **Editor** holds the yacht's General Arrangement (GA) drawings. Upload a deck plan, **drop pins that become work items**, and mark it up with shapes, text and coloured layers.

Where to find it: **Technical Management** → **Editor**.

Before you start

Each **deck** is a drawing you upload. You can keep several **versions** per deck and choose which one is active — so a redrawn plan never loses the pins placed on it.

Add a deck & upload a drawing

1. Click **Manage Images** (top right) — this opens the **Image Management** window.
2. Type a deck name and click **Add Deck** (or pick an existing deck).
3. **Drag & drop** a file into the deck's upload area, or click **browse** — one file per upload (PNG, JPG, PDF, DOC, XLS — max 100 MB).
4. Click **Done**.

WHAT HAPPENS NEXT

The drawing renders as the active version and gets a deck tab at the top of the editor. On an inactive version, **Set active** switches to it; the upload label reads **"Upload new version (replaces active drawing)"** once a deck has an active drawing, or **"Upload drawing"** when it doesn't — either way the version history is kept.

Drop a pin (create a work item)

1. Select the **pin tool** from the toolbar (tooltip: "Place pin (new item)").
2. Click the exact spot on the drawing.
3. Fill the **Add Work List** form (Title, Type, Layer, Priority...).
4. Click **Create Item**.

WHAT HAPPENS NEXT

A coloured pin appears at that point, the item is added to the **Work List** against this deck, and it's listed in the **Annotations** panel. Click the pin any time to open and edit the item (**Save Changes**).

Mark up the drawing

- Toolbar tools: **Select / move, Pan, Pin**, then **Line, Arrow, Rectangle, Ellipse, Text label** and **Freehand** to annotate, plus an **Eraser** to remove an annotation.
- Pick a colour from the **palette** (or a **Custom colour**) before you draw.
- **Undo** (Ctrl+Z) / **Redo** (Ctrl+Y) step back and forward through mark-up changes.
- The status bar along the bottom shows zoom %, cursor coordinates, the active layer, and toggles for **Grid** and **Snap** (25px).

Work with layers



- The **Layers** panel — Defects, Maintenance, Equipment, Compliance, Redlines — shows a live item count (and a critical count) per layer.
- The **eye** icon toggles a layer's visibility on the drawing; the **lock** icon blocks pins and annotations on that layer from being moved or edited.
- The **Annotations** panel lists every pin, with a search box ("Search title, ID, tags...") and status filter chips; use the collapse arrow to hide it and reclaim canvas space.

Troubleshooting & FAQs

- **My pin isn't showing** — its layer may be hidden or locked; re-enable the layer's eye in the Layers panel.
- **Wrong deck open** — the editor opens on the first deck; use the deck tabs to switch.

Q How do I edit a pinned item?

Click the pin on the drawing to open its edit form, change any field, then **Save Changes**. You can also open it from the Work List — the row's pin icon links straight to it on the drawing.

Q What file types can I upload for a deck?

PNG, JPG, PDF, DOC or XLS, up to **100 MB** — one file per upload.



04

ISM 4 SECTIONS

Introduction

Track your ISM compliance records — certificate expiry, the drill schedule, and crew rest hours — all under **ISM**.

Where to find it

Open from **Home > Applications > ISM**. This guide covers the **ISM Records** group in the sidebar.

What's inside

- **Certificates** — track certificates and their expiry with a Red / Orange / Green status.
- **Drill Matrix** — a year-long grid that schedules the required drills.
- **Hours of Work and Rest** — the MLC 2006 / STCW rest-hours logging tool.

FAQs

Q Where do I start?

For expiry tracking, go to **ISM > Certificates** and **Bulk Upload** your certificates. For drills, open **ISM > Drill Matrix**.

Q Why is a grid empty ("No Rows To Show")?

Nothing has been added to that record set yet — upload a certificate or add a drill to populate it.



Certificates

The Certificates page tracks every certificate and warns you before it expires, using a Red / Orange / Green traffic-light status.

Add a certificate

BEFORE YOU START

Have the certificate as a **PDF or image** to upload.

1. Go to **ISM > Certificates**.
2. Click **Bulk Upload** (top right).
3. In the **Bulk Upload Certificates** window, drag files onto the drop zone or click **Browse PDF or Images**.
4. Click **Add Certificate**.

The certificate appears in the tracking grid and is counted in the summary cards (**Expired / 0-90 days / 90+ days**).

Edit the parsed details

Open a row's : menu and choose **Edit** to adjust the parsed fields: **Certificate Name, Tags, Frequency, Issuer, Duration, Issue Date, Expiry Date, Notification Date** and **Certificate Number**. The same menu also has **View, Upload Document** and **Delete**.

WRONG DATES AFTER UPLOAD?

Open : → **Edit** to correct them. If the grid shows **"No Rows To Show"**, no certificates have been added yet.

Understanding the status colours

The traffic-light status appears both as summary cards and in the **Status** column:

STATUS	WHAT IT MEANS
RED — EXPIRED	Past its expiry date — "Past expiry — renew now."
ORANGE — 0-90 DAYS	Expiring within 90 days.
GREEN — 90+ DAYS	Valid beyond 90 days.

The **Notification Date** column drives when you're reminded ahead of expiry.

FOCUS THE LIST

Use **Filters** → **Expiring Status, Issuer, Expiry Date, Uploaded File** to narrow the grid (e.g. show only Red).

FAQs



Q How do I see only expiring or expired certificates?

Use **Filters** → **Expiring Status** and pick the status (e.g. Red) to focus the list.

Q What file types can I upload?

PDF or image files, via **Bulk Upload** → **Browse PDF or Images**.

Drill Matrix

The Drill Matrix is a year-long calendar grid that shows each drill's required frequency at a glance.

How the Drill Matrix works

Open it at **ISM > Drill Matrix**. **Rows** are drill types; **columns** are the twelve months (Jan–Dec) for the selected year. Each cell holds the scheduled date(s) for that drill in that month, so a drill's cadence is visible at a glance (e.g. Abandon Ship monthly, Emergency Steering Gear every two months, First Aid quarterly).

Drill types include Fire, Abandon Ship, Enclosed Space Rescue/Entry, Recovery of Persons from Water, Fire Engine Room, Man Overboard, Rescue Boat Launching to Water, Emergency Steering Gear, First Aid, Collision/Grounding, ISPS, SSAS Quarterly Test, and MARPOL & SOPEP.

Add a drill

1. Go to **ISM > Drill Matrix**.
2. Click **Add** (or **Add New** at the bottom of the drill list) to create a new drill row.
3. Set the drill's scheduled dates across the relevant months.
4. Use **Export** to download the matrix.

GIVE IT A MOMENT

The full-year grid can take a few seconds to render — wait for it to finish before editing cells.



Hours of Work and Rest

Hours of Work and Rest is the MLC 2006 / STCW rest-hours tool. You record each seafarer's daily work and rest, one crew member and one month at a time — Aquator works out the totals, flags any non-conformities, and holds the signed-off record.

Where to find it

Open **Compliance > ISM > Hours Of Work And Rest**. The screen opens on the current month for the first crew member, showing the **Month And Year** picker, the **Users** dropdown, a yearly **Status** strip, three summary cards (**Compliant Days / NC Days / Leave Days**), the signature panel, and the daily hours grid.

Record work and rest hours

PICK THE PERSON AND MONTH FIRST

The grid always belongs to the crew member in the **Users** dropdown, and changing the person or month reloads the record — so set both before you mark any cells.

1. Select the crew member from the **Users** dropdown (e.g. Pam Compass, Jim Blue, Jeff Ocean).
2. Click **Month And Year** and pick the month and year.
3. Find the day row (e.g. **01 - Mon**). Columns **00–23** are the hours; each hour has two cells — the full hour and the half-hour.
4. Click a cell to mark that half-hour as **work** (it turns filled/orange with a check). A blank cell counts as **rest**.
5. Repeat for each worked block. The four summary columns on the right update as you go.

As you mark cells, **Daily Work**, **Daily Rest**, **Weekly Work** and **Weekly Rest** recalculate live, compliant figures show in green, and the day's indicator and the top summary cards update to match.

NUMBERS NOT CHANGING?

A row reading **0 / 0** just means nothing is marked yet for that day. If clicking does nothing at all, check you're on the right crew member and month, and that the month isn't already signed off (a signed-off month is read-only).

Add a comment to a day

Use comments to explain exceptions — a port call, a drill, or an emergency — that affect the hours logged.

1. In the day's row, click **Add Comment** (in the **Comments** column).
2. Type your note in the inline box.
3. Click the save (disk) icon to keep it, or **x** to cancel.

The note is saved against that day — handy for recording the reason for any non-conformity.

How the daily and weekly totals are calculated

Each day's 24-hour grid is split into half-hour blocks. You mark the blocks worked; everything blank is treated as rest. From those marks Aquator derives the four read-only columns:



COLUMN	WHAT IT SHOWS
Daily Work	Sum of the marked (worked) half-hour blocks for that day.
Daily Rest	The remainder of the 24 hours — Daily Work + Daily Rest = 24 for a recorded day.
Weekly Work	Rolling total of worked hours across the relevant 7-day window.
Weekly Rest	Rolling rest total — blank days early in the month sit near 168 (24 × 7) and fall as worked hours add up.

Figures show green when within the compliant range. Because the weekly columns are rolling, changing one day can shift the weekly figures on neighbouring days — that’s expected, not a bug.

How compliance status works

Three places show the compliance picture for the selected seafarer:

- **Summary cards** — **Compliant Days** (meet the limits), **NC Days** (breach the limits), and **Leave Days** (recorded as leave).
- **Status strip** — runs Jan–Dec for the year: a red circle-with-x marks flagged months (non-compliant or not yet completed/signed); an empty grey circle marks months with no data.
- **Each day row** — carries its own indicator, and the Daily/Weekly columns turn green when within limits. A day breaching the daily or weekly thresholds is what adds to **NC Days**.

Because compliance is judged on rolling rest, a single heavy day can affect the days around it. Use the day comment to record the reason for any non-conformity.

How sign-off works

Each monthly record has a signature block with two sides: **Seafarer** (name, signature, date) and **Captain or Responsible Person Ashore** (name, signature, date). The **Sign Off** button captures the approval and fills those dates, finalising the record.

SIGN OFF GREYED OUT?

It appears when there’s nothing further to sign — a month already signed off, or one not yet ready. Once signed, treat the grid as a finalised record rather than something to keep editing.

Export the report

1. Open the crew member and month you want.
2. Click **Export** (top-right of the grid).
3. Choose **HOWR Report**.

The report for that seafarer and month is generated for download/printing — the format that includes the signature block.

FAQs





Q Why does Weekly Rest show 168 on empty days?

168 is a full week of rest (24×7). Days with no worked blocks sit at or near 168; the figure drops as worked hours are marked in that 7-day window.

Q Can I edit a month after it's signed off?

A signed-off month is a finalised record. If **Sign Off** is greyed and the signature dates are filled, treat the month as read-only.

Q How do I switch crew member or month?

Use the **Users** dropdown to change the seafarer and the **Month And Year** picker to change the period. Both reload the grid.



05

SMS 5 SECTIONS

Introduction

Build, store, distribute, and track the controlled documents and fillable forms that make up the vessel's Safety Management System. SMS lives under **Compliance → SMS**.

The four sections

The left sidebar splits SMS into four stores — they are **not** interchangeable; each holds a different kind of record:

- **Editor** — a drag-and-drop form builder where you design a form from scratch.
- **Templates** — the register of reusable, fillable blank forms (e.g. "Pre Departure", "Incident Report Form"). Crew fill these, they don't edit them.
- **Library** — the register of controlled reference documents, typically uploaded PDFs such as manuals and procedures (e.g. "EPM 3.0.0 Abandon Ship").
- **Populated** — the record of every completed submission, each carrying a Priority, Status, optional Note and the submitter's name.

THE MENTAL MODEL

Editor builds it → **Templates** stores the blank → someone **Fills the Form** → the result lands in **Populated**. The **Library** is a parallel store for static reference PDFs.

Search, filter & export

Library, Templates and Populated share the same controls:

- Use the **Search** box to find a record by name.
- Click **Filters** to filter by **Category** or **Created At**; use **Clear All** to reset.
- Click **Export** to generate the **SMS Library Report** as a PDF or spreadsheet (the two icons).

FILTERS RETURN NOTHING?

A previous filter may still be active — open **Filters** and click **Clear All**.

FAQs

Q What's the difference between the Library and Templates?

The **Library** stores reference documents (uploaded PDFs like manuals and procedures). **Templates** stores fillable forms crew complete. You add to the Library by uploading a PDF; you create a template by building it in the **Editor**.

Q Where do completed forms go after I fill them out?

They appear under **Populated**, not Templates. Templates only holds the blank master forms.



Editor

The Editor is a drag-and-drop builder for designing a form's layout. A form designed here becomes a reusable template.

Build a form

BEFORE YOU START

The Editor builds the **layout** only. Decide your fields (text, dates, checkboxes, signatures) and their order first.

1. Go to **Compliance → SMS → Editor**.
2. From the component palette on the left, drag a component onto the **Drag and Drop a form component** canvas. Components are grouped under **Basic, Advanced, Layout, Data** and **Premium**. Basic includes Text Field, Text Area, Number, Password, Checkbox, Select Boxes, Select, Radio and Button.
3. When you drop a component, its configuration window opens with four tabs (**Display, Data, Validation, Conditional**). Set the **Label** (required) and any other options — a live **Preview** shows on the right.
4. Repeat to add all fields. Use the **Search field(s)** box at the top of the palette to find a component quickly.
5. Click **Save** (bottom-right) when the form is complete.

The saved form becomes available as a reusable form. Closing the configuration window with the **x** discards an unsaved component.

SAVE DOES NOTHING?

The **Label** field is required on each component — an empty label blocks the save. (An empty canvas reading "Drag and Drop a form component" is just the normal starting state, not an error.)

Form field components (the four tabs)

Each component's settings are organised into four tabs — knowing what each controls prevents most "why is my field behaving like this" questions:

TAB	WHAT IT CONTROLS
Display	How the field looks — the Label, Label Position (e.g. Top) and Placeholder text shown inside an empty field.
Data	The underlying value — default values and how the field's data is stored.
Validation	Rules that must pass before the form can be submitted — for example marking a field required .
Conditional	When a field appears — show or hide it based on the answer given in another field.

The palette groups components into **Basic** (the everyday fields) plus **Advanced, Layout, Data** and **Premium** for more specialised needs.

FAQs



Q How do I add a signature field to a form?

Signature fields are part of the form's design in the Editor. Once present, they appear as a **"Sign above"** pad in the Fill Form / Submit Form window.

Library

The Library is the register of controlled reference documents — uploaded PDFs such as manuals and procedures. These are read/reference documents, not fillable forms.

Upload a document

BEFORE YOU START

Have the **PDF** ready — Library documents are uploaded, not built in the Editor.

1. Go to **Compliance** → **SMS** → **Library**.
2. Click **Add** (top-right).
3. In the **Bulk Upload Documents** window, drag the PDF into the drop zone or use **Browse PDF**.
4. Click **Save**.

The document appears as a new row showing **Name**, **Document Number**, **Category** and **Created At**.

Edit a document's details

Only the document's metadata and file are editable here: Name, Document Number, Category and the attached file.

1. On the document's row, click the actions menu (**three dots**) in the **Actions** column.
2. Click **Edit**.
3. In the **Edit Document** window, update the **Name**, **Document Number** or **Category**. To replace the file, remove the current PDF (the **x** on the file tile) and drag a new one into the **Drag & Drop Document here / Browse Document** area.
4. Click **Save** (or **Cancel** to discard).

CAN'T FIND EDIT?

It's inside the three-dot actions menu on the row, alongside **View**, **Delete** and **Download**. If the table is empty, no documents have been uploaded yet.

Document categories

Both Library documents and Templates are filed under a **category**, which drives filtering and reporting. A misfiled document still exists but won't surface where users expect it. Categories aren't a fixed list — you create and manage your own to match how your vessel organises its documents.

There are two ways to add a category:

- **On the fly** — in the **Category** dropdown (in the Upload or Edit Document window), type a new name and choose the "create" option. It's added and selected straight away.
- **From the category manager** — open the **Add/Edit Category** window to add a category, **rename** one (the pencil icon), **reorder** the list (drag the handle) or **delete** one (the trash icon), then click **Save**.



CAN'T DELETE A CATEGORY?

A category that's still in use can't be removed — reassign any documents filed under it to another category first, then delete it.

DOCUMENT HAS NO/INCORRECT CATEGORY?

Categories aren't always set on upload — open the row's actions menu → **Edit** to assign one.

Templates

Templates is the register of reusable, fillable blank forms. Crew **fill** these rather than editing the master — each completed copy lands in **Populated**.

Fill out a template

BEFORE YOU START

The blank form must already exist under **Templates**. If it doesn't, build it in the **Editor** first.

1. Go to **Compliance → SMS → Templates**.
2. On the template's row, click the actions menu (**three dots**).
3. Click **Fill Form**.
4. In the **Submit Form** window, complete the fields (e.g. Name, Date/Time, Rank, Location). Signature fields are signed in the **"Sign above"** pad.
5. Submit the form.

The completed form is saved as a new entry under **Populated**, where it's tracked with a Status and Priority.

USE FILL FORM, NOT EDIT

Edit changes the master template for everyone; **Fill Form** creates one completed copy. If you can't submit, a required field (set in the form's Validation rules) is likely empty.

The actions menu

Each template's three-dot menu offers more than edit:

ACTION	WHAT IT DOES
View	Opens a read-only preview.
Edit	Reopens the form to change its design (affects everyone).
Fill Form	Opens a blank copy to complete.
Duplicate	Creates a copy you can modify into a new template without altering the original.
Revision Control	Tracks versions so you can see and manage change history.
Delete	Removes the template.
Download	Saves a copy of the form.
Copy Link	Copies a direct link to the template.



FOR ISM COMPLIANCE

Use **Duplicate** (rather than editing a master) when you want a variant, and **Revision Control** when you need an audit trail of changes.

FAQs

Q Can I reuse an existing form as a starting point for a new one?

Yes — in **Templates**, open the row's actions menu and choose **Duplicate**, then edit the copy.

Q Can I get a direct link to a specific form?

Yes — the actions menu on **Templates** and **Populated** rows includes **Copy Link**.

Populated

Populated is the record of every completed submission. Each entry carries a Status and Priority you set inline to drive the review-and-sign-off workflow.

Status and Priority

Status moves a submission through its lifecycle. A typical path is **Open** → **In Progress** → **Done** → **Approved**, with **Rejected** sending it back and **Archived** closing it out.

STATUS	MEANING
OPEN	Logged, not yet started.
IN PROGRESS	Being worked.
ON HOLD	Paused.
DONE	Form complete.
APPROVED	Signed off.
REJECTED	Sent back.
ARCHIVED	Closed out / removed from active view.

Priority flags urgency: **None, Low, Medium, High**. Each row also shows the **Name** of the submitter, and you can add a free-text **Note**.

Update Status, Priority or Note

1. Go to **Compliance** → **SMS** → **Populated** and find the submission's row.
2. To change urgency, click the **Priority** dropdown (None, Low, Medium, High).
3. To change workflow state, click the **Status** dropdown (Open, On Hold, In Progress, Done, Approved, Rejected, Archived).
4. To add context, click the **Note** cell ("Add notes ---") and type your note.

Changes save inline on the row — there's no separate save button for these fields.

NO EDIT OPTION FOR THE ANSWERS?

Populated submissions are records: you can change **Status, Priority** and **Note**, plus use **Revision Control**, but the submitted answers aren't edited here. The row actions menu offers **View, Download, Copy Link, Delete** and **Revision Control**.

06 CREW MANAGEMENT 7 SECTIONS

Introduction

Crew Management is where you manage every record about your crew — across the whole fleet, in one place.

What's inside

Six areas, each its own screen under **Crew**:

- **Personal Information** — identity, passport, visa and seaman's-book details.
- **Employment** — contract terms, and where you create and manage each person's SEA.
- **Payroll** — generate and track pay for a period.
- **Certificates** — track validity and flag what's expiring.
- **Leave & Rotation** — balances, approvals, and on/off-duty rotation groups.
- **Emergency Contacts** — each crew member's next of kin.

How it works

One simple pattern runs through every screen:

- **Read on the screen** — the Crew screens are fleet-wide views: search, filter and export across everyone.
- **Edit on the profile** — to change one person's details, open their profile (Admin Console → Users → the person).
- **It flows back** — save on the profile and the change shows on the screens.

The same on every screen

- **Search** matches name, ID and rank; **Filters** narrow to a group.
- **Save View** keeps your filters and column layout (just for you).
- **Export** downloads a report (PDF or Excel).
- **View** opens a read-only panel; **Edit** opens the profile.

FAQs

Q How do I add a new crew member?

Not from these screens — they manage existing crew. New people join through the **Invite Users** flow.

Q How do I edit someone's details?

Click **Edit** on their row. It opens that person's profile at the right tab (Personal Information, Employment, Certificates, Leave or Emergency Contact). The grids themselves are for viewing and exporting.



Q Why can I see some crew but not edit them?

Edit only appears for crew that belong to your account, and you need Edit access to that screen. Admins can edit everyone.

Q How do I export a report?

Use the **Export** button on any screen (PDF or Excel). On most PDF exports you can pick which columns to include.

Q Why don't I see a certain screen or button?

Your role doesn't grant access to it. Access is set per screen by an admin; admins see everything.

Personal Information

The crew roster — one row per crew member with their identity, passport, visa and seaman's-book details. It feeds crew lists, port paperwork and compliance checks, and it's the source for the IMO Crew List, so keeping passports and visas current here saves you scrambling at arrival.

Where to find it: Crew → Personal Information.

What you'll do here

- Find a crew member fast.
- Keep passport / visa details current.
- Produce an IMO Crew List for a port call.
- Pull a crew report for a manager or an audit.

Find someone quickly

- **Search** (top right) matches name, ID and rank.
- **Filters** narrows the list by ID, gender, rank, nationality, languages, country of passport, visa name or seaman's book number — plus **Yacht** on the fleet view.
- **Tip:** once you've set a useful cut, click **Save View** to keep it (your filters and column layout are saved to your account only); **Clear All** resets it.

Update a passport or visa

The grid is **read-only** — you edit on the person's profile.

1. On the crew member's row, click **Edit** (the row also has **View** for a read-only peek).
2. Their profile editor — the **User Settings** page — opens on the **Personal Information** tab.
3. Update the fields, then **Save**.

WHY READ-ONLY HERE?

The grid is a fleet-wide view. Edits happen one person at a time on their profile, so every change is deliberate and auditable — you can't accidentally overwrite the roster.

Produce an IMO Crew List

1. Click **Export** (top right) → **IMO Crew List**.
2. Ship details pre-fill from the yacht — check them.
3. Select the crew to include (at least one).
4. Fill voyage, port and date fields.
5. Optionally draw a signature, then **Generate**.



GOOD TO KNOW

Fill in the ship and voyage details, and pick **at least one crew member** (miss that and you'll see "Please select at least one crew member"). It opens as a PDF in a new tab and **saves nothing**, so generate as many as you need.

Export the roster

Click **Export** → **Personal Information Report** (PDF with a column picker, or Excel). Pick only the columns the recipient needs — e.g. just name, rank and passport for a port agent.

Troubleshooting

- **"Please select at least one crew member"** — tick at least one person before generating the IMO list.
- **A field won't change in the grid** — it's read-only by design; edit it on the profile.
- **No Yacht column / no "Include Company Users"** — those appear only on the fleet view, not on a single-yacht account.

Who can do this

- **View / search / filter / export:** View access to Personal Information.
- **Editing details:** Edit access (changes are made on the profile). Admins always have full access.

Employment

Employment shows each crew member's currently active contract — their SEA. The SEA is the single record everything downstream is calculated from: salary, daily rate, leave accrual, travel/flight entitlements and every payslip. Get the SEA right and payroll and leave look after themselves; get it wrong and both will be wrong — so it's the record to take the most care over.

Where to find it: Crew → Employment.

What you'll do here

- See who's on what contract, and who's expiring.
- Onboard a new crew member's contract.
- Give someone a pay rise or change their terms.
- Off-board someone.
- Export an employment report.

Read the Employment list

- One row per crew member, showing their **active** contract — hire date, expiry, type, salary, daily rate and travel entitlements.
- The **Contract Expiry Date** is colour-coded so renewals jump out: **RED** if expired or within 30 days, **AMBER** within 60/90 days, plain otherwise. Hover for the exact "Expires in N days."
- **Filters:** Yacht (fleet) · ID · Rank · Hire Date · Contract Expiry Date · Contract Type · Contract Currency · Contract Salary.
- Per row, **View** opens a read-only Employment Details panel.
- The grid is **read-only** — manage a contract from the person's profile (Admin Console → Users → the person → **Employment** → **SEA**).

The SEA — where you manage it

On the profile: Admin Console → Users → the person → **Employment** tab → **SEA** (its sibling tabs are Leave Details, Bank Details and Payslip).

- **SEA Details** (left) shows the selected agreement's terms, with a status chip.
- The **timeline** (right) is the person's full contract history — **SEA Start** → **SEA Amendment(s)** → **SEA End** — each node showing its date range; click the eye to view a version. Active nodes are green, future ones blue, past ones greyed.
- **SEA Actions** (top right) is where you Start, Amend or End — disabled if you don't have edit access.
- No contract yet? The tab reads "No Contract Details Found."

Statuses

STATUS CHIP	MEANING
Active	The currently-running agreement
Effective from {date}	Starts in the future
End at {date}	A termination is scheduled but hasn't happened yet
Amended	Superseded by a later amendment
Ended	Already terminated

You don't edit or delete an agreement directly. To change an active contract you **Amend** it; to stop it you **End** it. The chain keeps the full history.

Onboard a contract — Start a SEA

SEA Actions → **Start SEA** opens a short wizard — **Contract** terms, then **Leave** terms, then **Travel** — with a live **Daily Salary** in the footer so you can confirm the figure as you go. Work through it with **Next**, then **Finish** to create the contract.

A few things worth knowing as you fill it in:

- Leave the **expiry date** blank for an open-ended ("Indefinite") contract.
- The **Salary Calculation** you pick is what turns the salary into a daily rate — it drives every payslip, so choose the right basis (see *How salary is calculated*).
- Attach the **signed agreement (PDF)** here, so the contract and its document stay together.
- If the SEA Type is **Rotation**, leave is handled by the rotation pattern and the entitlement is fixed.

Give a pay rise or change terms — Amend a SEA

SEA Actions → **Amend SEA** ("Modify SEA terms or duration"). An amendment is a **new linked version** in the same chain — the original stays in the history.

- You go through the same wizard, then record the **reason** for the change (and any internal notes) and the **Amended Date** it takes effect.
- On save, Aquator re-chains the agreements so the previous version ends the day before the amendment begins — no overlap, no gap.
- **Currency can't be changed** on an amendment.

HEADS-UP

You can't amend while a future contract is already scheduled. For a **Rotation** contract, remove the person from their active rotation group first.

Off-board — End a SEA

SEA Actions → **End SEA** ("Terminate the contract permanently"). Set the **end date**, give a reason and comments, and it's done — ending is **permanent**.

- The end date must sit after the contract's start and before the previous expiry / next hire date.

- For a Rotation contract, the person is automatically disabled from their rotation group on that date.

How salary is calculated

METHOD	YOU ENTER	DAILY RATE
Salary ÷ 30 days	Monthly salary	salary ÷ 30
Salary ÷ 31 days	Monthly salary	salary ÷ 31
Salary × 12 ÷ 365	Monthly salary	(salary × 12) ÷ 365
Day Rate	A daily amount	the amount itself

A full calendar month pays the full monthly salary (the method makes no difference). A partial period pays **daily rate × days worked** (both first and last day count). Example — 3,000/month, joining the 12th of a 30-day month (19 days): ÷30 → 1,900.00; ÷31 → 1,838.63; ×12÷365 → 1,873.97.

Which method? ÷30 is the simplest, consistent month basis (most common for monthly-salaried crew); ÷31 gives a slightly lower daily rate where your payroll convention requires it; ×12÷365 is the most precise across a full year; **Day Rate** is for crew paid per day (typically Dayworker and Temporary).

How leave accrues

- **Annual Leave** → Days Per Year ÷ 365, or Leave Entitlement – Leave Taken.
- **Accrued Leave Per Month** → Days Accrued ÷ 30 / ÷ 31 / × 12 ÷ 365.
- **Rotation** → Days Accrued × Days Worked.

On the **Leave Renewal Date** the balance resets each year and unused days roll into **carried-over** leave. Travel days count as worked days for salary but **don't** accrue leave.

The contract chain

All versions of one engagement sit in a single timeline — **Start → Amendments → End** — so you always have the full history. Aquator keeps them chained automatically: each agreement ends the day before the next begins, with no gaps or overlaps.

Troubleshooting

- **“Hire date cannot be more than 1 year in the future”** — pick an earlier hire date.
- **“Hire date cannot create a gap with the previous contract...”** — align it with the prior agreement’s end.
- **“Payslip already exists after or on selected dates”** — a payslip is blocking that date; choose another, or remove the payslip first.
- **“Please disable user from active rotation group to amend a contract of type rotation.”** — remove them from the rotation group, then amend.
- **“SEA expiry date must be after hire date” / “Probation end date must be before contract expiry date”** — fix the date order.
- **SEA Actions is greyed out** — you don’t have Edit access to Employment.

Who can do this

- **View the grid, details and history:** View access to Employment.
- **Start, Amend or End a SEA:** Edit access to Employment. Admins (and the legacy super-admin) always have full access.

FAQs

Q Where do I set up someone's contract (SEA)?

On their profile's **SEA** tab. The Employment screen shows the active contract; you create and change it from the profile.

Q How do I change contract terms like salary?

Use **Amend SEA** — it records the change from a chosen date and keeps the history. Active contracts can't be edited directly.

Q Which salary calculation method should I use?

Salary ÷ 30 days for a simple monthly basis, **× 12 ÷ 365 days** for an annualised daily rate, or **Day Rate** for crew paid per day. It only changes pay for partial months — a full month always pays the full salary.

Payroll & Payslips

Payroll turns each crew member's active SEA into a payslip for a chosen period. It reads the contract — salary, daily rate, currency — straight from the SEA, which is why a wrong SEA shows up here as wrong pay. The whole screen works to a **date range**, and every figure reflects it.

Where to find it: Crew → Payroll.

What you'll do here

- Run pay for a period (generate payslips in bulk).
- Mark people Paid or Unpaid.
- Generate or adjust an individual payslip.
- Export a payroll report.

Set the period first

Everything on the screen is for the **date range** in the top-right picker (it defaults to the current month). Change it and click **Apply** before anything else — Status, totals and who's eligible to generate all depend on it.

Read the list

- One row per crew member for the selected range, with their pay components (salary, entitlement, leave, reimbursements, final settlement, bonus, bank charges, deductions, gratuities) and a **TOTAL** row at the bottom.
- **Status** is set automatically: **GENERATED** if a payslip exists for that range, otherwise **PENDING**.
- **Paid Status** is **PAID** / **UNPAID**, set per row (it reads **Select** until a payslip exists).
- **Filters:** Yacht (fleet) · ID · Status · Paid Status · Rank.

Run pay for a period — Generate (bulk)

1. Set the **date range** (defaults to the current month).
2. Click **Generate** — the **Bulk Create Payslip** window opens.
3. It lists everyone **eligible**: crew with no payslip yet for that range (Status = Pending), Unpaid, and with an active contract in the period. Remove anyone with the **x**, or use **Search employee...** / the yacht filter.
4. Click a person (the **eye**) to review or adjust their payslip; the footer shows **Total Payroll**, grouped by currency.
5. Clear any row flagged with a warning (ⓘ) — "{n} employee(s) have validation errors. Please resolve them before saving."
6. Click **Create Payslips (N)**.

GOOD TO KNOW

Generating is **append-only** — it never overwrites anything, there's no delete or regenerate here, and a duplicate range is skipped ("Payslip already exists for this date range"). Clicking **Create Payslips** submits immediately (no extra confirmation); the result reads "Bulk payslip creation completed: X succeeded, Y failed." To change figures afterwards, edit the individual payslip.

Mark someone Paid or Unpaid

1. Find the crew member's row.
2. Open the **Paid Status** dropdown.
3. Choose **Paid** or **Unpaid** — it saves instantly ("Payslip status updated") and can be toggled back.

Generate a single payslip

As well as the bulk run above, you can create or adjust a payslip for **one person** two ways:

- Crew → Payroll → the person's row → **Payslip**, or
- their profile → **Employment** → **Payslip** tab → **Generate Payslip** (this tab also lists their **Payslip History**, where you can view, edit or delete past payslips).

Both open the same **Generate Payslip** editor:

1. Set the **Payslip Range Date** (defaults to the current month). Tick **Biweekly** to pay half a month — the range must be **13–16 days**.
2. Contract details (type, hire date, salary, salary-calculation method, leave terms) are **locked** — they come from the SEA. **Daily Salary** and **Period Salary** update live.
3. Adjust the amounts: Addition, Deduction, Bonus, Gratuity, Social Security, Insurance, Bank Charges, plus **Final Settlement** and **Reimbursement** rows. On a crew member's *last* payslip, enable **Leave Payout**.
4. Click **Confirm** — the payslip saves (as **UNPAID**) and opens for printing.

GOOD TO KNOW

Editing is **disabled** if you lack Edit access, or the payslip is already **Paid** — mark it Unpaid first. A duplicate date range is skipped, and you can't generate while a leave request in that period is still pending.

Export

Click **Export** (top right) → **Payroll Report** (PDF with a column picker, or Excel), plus a **Custom Export**.

Troubleshooting

- **"Payslip is not generated!"** (spelling as in the product) — that row has no payslip for the range; generate one before setting Paid status.
- **Generate shows "No eligible employees"** — everyone in range already has a payslip, is already Paid, or has no active contract; check the date range.
- **A row won't let me edit the payslip** — it's already Paid (toggle to Unpaid), or you don't have Edit access.
- **"Payslip already exists for this date range"** — that person already has a payslip for those exact dates; it's skipped to avoid duplicates.
- **"Create a contract to generate payslip"** — set up the person's SEA first.
- **"You can't generate a payslip for selected period until leave is approved or rejected"** — clear any pending leave in that period first.
- **"Leave payout must be enabled because this is last payslip of the user"** — turn on Leave Payout for a final payslip.
- **Figures look wrong** — check the crew member's SEA (salary, currency, salary-calculation method); Payroll reads straight from it.

Who can do this

- **View / Export:** View access to Payroll.
- **Generate, edit a payslip, change Paid Status:** Edit access to Payroll. Admins always have full access.

FAQs

Q How do I run payroll?

Set the date range, click **Generate**, review the prepared payslips, and create them in one batch. It includes crew who don't yet have a payslip for that period.

Q Why is the Payslip button greyed out?

Either you don't have Edit access to Payroll, or that payslip is already marked **Paid**.

Q What's the difference between "Generated" and "Pending"?

Generated means a payslip exists for the selected period; **Pending** means it hasn't been created yet.

Certificates

A per-crew certificate-tracking calendar — each crew member expands to their certificates, and each expiry sits under its month, colour-coded by how soon it lapses. It's your fleet-wide compliance view: what's expired, what's expiring, and whether each rank meets Safe Manning.

Where to find it: Crew → Certificates.

What you'll do here

- See what's expired or expiring across the fleet at a glance.
- Check a rank against its Safe Manning requirements.
- Add, update or upload a crew member's certificates.
- Export a certificates report.

Read the tracking calendar

- Each crew member expands to show their certificates against the 12 months (JAN-DEC), with the expiry under its month.
- A **year selector** (two years back to five ahead) sits in the December column.
- The eye icon opens a read-only view of a certificate.
- **Export** → "Crew Certificates Report" (PDF).

Summary cards & Safe Manning

Four cards give fleet-wide compliance at a glance: **EXPIRED** · **0-90 DAYS** · **90+ DAYS** · **SAFE MANNING** (the certificates each rank must carry).

- Each rank has **required** and **optional** certificates; required ones show a "Safe Manning – Required" badge.
- Certificates a person is missing appear as empty placeholder rows, so gaps are visible.

Expiry colours

- **RED** — expired.
- **ORANGE** — within 90 days.
- **GREEN** — more than 90 days out.

Add or edit a certificate

Certificates are managed on the profile — Admin Console → Users → the person → **Certificates** tab.

1. Open the profile's **Certificates** tab and add a certificate.
2. Give it a **name** and an **issue date**, and attach the **file**.
3. Add any extra detail you have — issuer, expiry, frequency, notes — then **Save**.



GOOD TO KNOW

The file isn't really optional — save without one and you'll see "Certificate Not Uploaded!". Issuer offers the usual flags and registries (MCA, Cayman, Marshall Islands, ABS, DNV, Lloyds...), and frequency runs from one-off up to every 10 years.

Bulk Upload

1. On the Certificates tab, click **Bulk Upload**.
2. Drag & drop images or PDFs, or browse to select them.
3. The files upload and process into certificate records.

FILE LIMITS

Accepted types: PNG, JPG, PDF, Office docs (DOC/DOCX/XLS/XLSX) and CSV; up to **100 MB** per file and up to **5 files** at a time. Messages cover wrong type, too many, and over-size files.

Filters

Yacht (fleet) · Safe Manning (Required/Optional) · Expiring Status (Green/Red/Orange/None) · Issuer · Expiry Date (range) · Uploaded File (Yes/No) · Rank.

Who can do this

- **View / Export:** View access to Certificates.
- **Adding, editing, uploading or removing certificates:** Edit access (on the profile's Certificates tab). Admins always have full access.

FAQs

Q What files can I upload, and how big?

PNG, JPG, PDF, Office documents and CSV — up to **100 MB** each.

Q What do the colours mean?

RED expired · **ORANGE** expiring within 90 days · **GREEN** valid for more than 90 days.

Q What are required vs optional certificates?

Each rank has a required and optional list (set in account settings). Missing required ones show as gaps so you can chase them.



Leave & Rotation

Each crew member's leave entitlement, accrual and balances, plus a duty-status badge — and the Rotation tool for on/off-duty groups.

Where to find it: Crew → Leave.

What you'll do here

- Check leave balances and who's on or off duty.
- Request leave (your own or a crew member's).
- Approve or reject leave requests.
- Set up and run rotation groups.
- Export a leave report.

Read the Leave grid

- One row per crew member: Leave Type, Renewal, Entitlement, Carried Over, Approved, Daily Accrued, Available, Pending, and Status (**On Duty / Off Duty**).
- **Available Leave** turns **RED** when negative — the person is overdrawn.
- Balances are always recalculated from approved leave, so they update on the next refresh.
- **Filters:** Yacht (fleet) · ID · Leave Type · Status (On/Off Duty) · Pending Leaves · Leave Entitlement.

Request leave

Leave requests are made on a person's **profile**, not on the Crew → Leave grid (that grid is for *approving* them).

1. Open the profile → **Leave** tab, then click **Leave** (top right) — the **Request Leave** window opens.
2. Pick the **Leave Type**: Annual, Compassionate, Compensatory, Rest Days, Shore, Sick, Study or Unpaid.
3. Choose the **Leave Date Range** (start and end).
4. *Optional:* add **Travel Days** rows, a **Flight Deducted** figure, **Comments**, and attach files.
5. **Leave Days Deducted** is worked out for you (leave days minus travel days). Click **Save**.

WHAT HAPPENS NEXT

The request is created as **PENDING** and shows on the Crew → Leave screen for a manager to **Approve** or **Reject**. Sick, Study, Unpaid and Shore leave don't deduct from the balance. A crew member can always request **their own** leave; requesting it on someone else's profile needs Edit access to Leave.

COMMON MESSAGES

"Leave is already taken for one or more dates in this range" (overlaps an existing request) · "Leave end date must be on or after start date" · "Travel days range must be between or on start date and end date" · "Payslip is already generated for the selected date range..." (that period has already been paid, so leave can't be added over it).

Approve or reject leave



1. Click **View** on the crew member's row to open their leave requests (type, dates, days, travel, comments, attachments).
2. Find the **pending** request.
3. Click **Approve** (✓) or **Reject** (×).

WHAT APPROVE/REJECT ACTUALLY DOES

It changes the request's status only — **no email is sent**. Approving counts the leave as taken (balances drop on refresh); rejecting has no balance effect. The ✓/× controls are hidden on rotation rows and disabled once a request is decided.

Who can approve

Approving or rejecting needs **Edit access to Leave** and a manager/admin-level account — standard crew ("user") accounts cannot, even with Edit.

Rotation

Within Leave, **Rotation** manages on/off-duty groups, organised into tabs by state (Active / Disabled / Rotation Ended). Each group has on-duty and off-duty day counts, a colour, and members with individual schedules.

1. On Leave, click **Rotation**.
2. Click **+ Group**.
3. Set the group **Name**, **Days On Duty** and **Days Off Duty**.
4. Add **Users** and pick a **Colour**.
5. Click **Save**, then **Start** to begin the rotation.

Rotation controls

CONTROL	WHAT IT DOES	REVERSIBLE?
Create / Edit group	Name, on/off days, colour, members. Members can't change once started; an ended group can't be edited.	Until started/ended
Start	Begins the rotation (sets each member's first schedule).	—
Switch	Switches members On/Off duty (or extends). Only when a switch is pending and there's no future schedule.	Latest segment deletable
End Rotation	Sets end dates, moves the group to "Rotation Ended", records history.	NO — TERMINAL
Enable / Disable	Disables a group (with an end date) or re-enables it.	YES
Add User · History	Adds crew not already in a group; History is a read-only audit log.	—
Delete group / schedule	Deletes and resets affected leave calculations (latest schedule only).	NO

Rotation rules & warnings





- Group name is required; on/off days must be greater than 0; at least one member.
- Travel days count as work days but do **not** accrue leave.

VERBATIM WARNINGS

End Rotation: "Once ended, no further switches will be possible." **Delete group:** resets leave calculations for the users and "is irreversible." **Delete schedule:** "You can only delete the latest schedule for a user in their group."

Who can do this

- **View / Export & History:** View access to Leave.
- **Approve/reject, and rotation create/start/switch/end/enable/add-user:** Edit access (approvals also need a manager/admin-level account).
- **Delete group or schedule:** Delete access. Admins always have full access.

FAQs

Q How do I apply for leave?

On the person's profile → **Leave** tab, click **Leave** to open **Request Leave** (see *Request leave* above). A crew member can request their own leave.

Q What happens when I approve or reject leave?

Approve reduces the person's available balance; **reject** doesn't. No email is sent — it's a status change.

Q Why can't I approve a leave request?

You need Edit access to Leave and a manager/admin-level account. Standard crew accounts can't approve or reject.

Q What's the difference between disabling and ending a rotation?

Disabling is reversible — you can re-enable it later. **Ending** a rotation is permanent.

Emergency Contacts

Each crew member's single next-of-kin / emergency contact — one row per person (not a list).

Where to find it: Crew → Emergency Contacts.

What you'll do here

- Look up a crew member's next of kin.
- Keep an emergency contact current.
- Export the emergency-contact list.

Read the list

- One row per crew member: Next of Kin, Relationship, Phone, Email, Address, Country, City, State, Post Code and "English?".
- The row's **View** opens an Emergency Contact Details panel.
- **Filters:** Yacht (fleet) · ID · Country.

Edit a contact

1. Click **Edit** on the crew member's row.
2. Their profile opens on the **Emergency Contact** tab.
3. Fill the fields, then **Save**.

Rules

- One contact per crew member.
- All fields are optional *except* Email, which must be valid if entered.
- Country comes from the 252-country list; "Does the contact speak English?" is free text (Yes/No suggested, not enforced).
- Export success: "Report download started."

Export

Click **Export** → "Emergency Contacts Report" (PDF with column selection, or Excel).

Who can do this

- **View / Export:** View access to Emergency Contacts.
- **Editing:** Edit access (on the profile's Emergency Contact tab). Admins always have full access.

FAQs

Q How many emergency contacts can someone have, and where do I edit it?

One per crew member, edited from their profile's **Emergency Contact** tab. All fields are optional except a valid email.



07

IN/OUT BOARD 5 SECTIONS

Introduction

The In/Out Board tracks who is currently on or off the yacht — crew, guests and contractors — by toggling each person's In/Out status. It supports adding and editing people, inline comments, column/display configuration, exporting a board report, and a lockable kiosk screen for self check-in.

Where to find it

Go to **Home** → **Applications** → **In/Out Board** → **Board** (the **In/Out Board** item under the IN/OUT BOARD section in the sidebar). The board opens empty with **"No Rows To Show"** until you add at least one person.

Two things to understand first

- **Manual vs Geo Fence mode** determines whether you can flip the Status toggle by hand at all — see **Status & Modes**.
- **Two layers of filtering** (a User State filter and a department Filter) can both hide rows — see **Filters & Views**.

FAQs

Q Can crew, guests and contractors all go on the same board?

Yes. When you add a person you assign a **Department** — Crew, Guests or Contractors — and the board's **Filter** lets you view them all together or one group at a time.

Q Why does the board show "No Rows To Show"?

Either no one has been added yet, or a filter is hiding everyone. Add people via **Users**, and check both filter layers (see **Filters & Views**).

People

People are the rows on the board. Add crew, guests and contractors, edit their details, comment inline, and deactivate or delete them.

Add a person

BEFORE YOU START

Have the person's **first name, last name, email, department** and **position** ready — these five fields are required and Save stays inactive until all are filled.

1. On **Board**, click **Users** (top right).
2. In the Add dialog, fill in **First Name, Last Name** and **Email**.
3. Choose a **Department**: Crew, Guests or Contractors.
4. Enter a **Position**.
5. Optionally add **ID Number, Phone** (with country code), a **Comment** and a **Profile** image.
6. Click **Save**.

A green **"User created"** confirmation appears and the person shows as a new row with their avatar, a Status toggle, name, comment area and an actions menu.

A REQUIRED FIELD IS FLAGGED?

One of the five required fields (First Name, Last Name, Email, Department, Position) is blank — fill it in. The Save button stays inactive until all required fields are completed.

Edit a person

1. On the person's row, click the **:** menu under **Actions** and choose **Edit**.
2. Update any field — the dialog carries the same fields as Add.
3. Click **Save**.

The dialog closes and the row reflects your changes. The same required-field rules apply.

Add or edit a comment

1. In the person's **Comment** column, click **+ Add Comment**.
2. Type your note in the inline field.
3. Click the **save (disk)** icon to keep it, or the **x** icon to cancel.

The comment saves inline on the row; reopen it the same way to change it.

Deactivate vs Delete

Each row's **:** Actions menu offers three options:



ACTION	WHAT IT DOES
Deactivate	Takes the person off the active board without permanently removing their record — use for someone who has left but whose history you want to keep.
Edit	Opens their details for changes.
Delete	Permanently removes the entry — use only when the record is no longer needed.

FAQs

Q Can crew, guests and contractors all go on the same board?

Yes — assign each person a **Department** (Crew, Guests, Contractors), then use the board **Filter** to view all together or one group at a time.

Status & Modes

A person's In/Out status shows whether they're on or off the yacht. How it's set depends on whether the board is in Manual or Geo Fence mode.

Set someone's In/Out status

1. On **Board**, find the person's row.
2. Click the **Status** toggle in their row.

The toggle flips colour to show the new state — **GREEN = IN** , **RED = OUT** . The change saves immediately; there's no separate save step.

TOGGLE WON'T SWITCH?

The board may be in **Geo Fence** mode rather than **Manual** — in Geo Fence mode status is driven automatically. Use the header **Manual/Geo Fence** toggle (left of Report) or **Settings → In/Out Mode** to switch back to Manual.

Manual vs Geo Fence mode

This is the single most important setting to understand, because it determines whether you can flip the Status toggle by hand at all.

- **Manual** (the default) — each person's status is set by clicking the Status toggle on their row (or via the kiosk/screen-lock check-in). Nothing happens automatically.
- **Geo Fence** — status is tied to **location**: people are marked In or Out automatically based on whether they're inside the defined boundary. The manual toggle is not the primary driver here.

Switch between them in two places, which stay in sync: the **In/Out Mode** radio in **Settings** (Manual / Geo Fence), or the quick toggle in the header to the left of the **Report** button.



Filters & Views

There are two layers of filtering on the board, and they're easy to confuse — if the board looks emptier than expected, check both.

The two filter layers

- **Filters button** (top left) — opens a **Filter By** panel with a **User State** filter that narrows by current In/Out state (who is In vs Out). Use **Clear All** to reset.
- **Filter setting in Settings** (All / Crew / Guests / Contractors) — controls which **department** the board shows by default.

BOARD EMPTIER THAN EXPECTED?

A **User State** filter or a department **Filter** may be hiding rows that actually exist. Check both.

View mode

From **Settings** → **View Mode**, display the board as a **List** or a **Grid**.

Settings & Export

The Settings panel controls how the board looks and behaves; Export produces a board report.

Board settings explained

The **Settings** button (top right) opens one panel with these sections:

- **General Settings → Yacht Details** — set a **Logo** and a **Name** for the board (e.g. "Account A").
- **Table Fields** — checkboxes to show/hide columns: Profile, First Name, Last Name, Email, ID, Department, Position, Phone, **Last In, Last Out**. (Last In / Last Out are available here even though they're hidden by default.)
- **View Mode** — List or Grid.
- **Filter** — default audience: All, Crew, Guests or Contractors.
- **In/Out Mode** — Manual or Geo Fence (see **Status & Modes**).
- **Date/Time Format** — Date Format (e.g. MM/DD/YYYY), Time Format (12 or 24 hours) and Time Zone (Auto or Manual).
- **Screen Lock** — the kiosk/lock screen: **Clock** (Show/Hidden), **QR Registration** (Show/Hidden — controls whether people can self-register via QR code), and **Set Password** to protect the lock screen using a Password, Pin or Account credential.
- **Sync Users** — a **Sync Now** button to pull the latest user list into the board.

REMEMBER TO SAVE

Click **Save** in the Settings panel to apply changes — **Cancel** discards them.

Export the board report

1. On **Board**, click **Export** (top right).
2. Under **IO Board Report**, choose the format: the **PDF** icon or the **spreadsheet** (Excel/grid) icon.

The board report is generated in the chosen format for download.



08 USER MANAGEMENT 4 SECTIONS

Introduction

Manage roles, permissions, user invitations, and user records in the Aquator Admin Console — control who can access what across your accounts.

Where to find it

Open **Admin Console** → **Users** (the **Users** item in the left sidebar). The module has three tabs: **Roles**, **Users** and **Invite User**.

How it fits together

- **Roles** — define a named set of permissions (View / Edit / Delete per area).
- **Invite User** — queue people to invite and assign each an existing role.
- **Users** — the list of users, where you change roles/status and edit records.

THE ONE RULE TO REMEMBER: ROLES ARE ACCOUNT-SCOPED

Each role belongs to a single **Account** (e.g. AquatorCharter, AquatorGV, Account A–D). A role created under one account won't appear under another. If a user's access looks wrong, the role was often created under a different account than expected.

FAQs

Q Can I change a user's role without re-inviting them?

Yes — on **Users**, use the inline **Role** dropdown on the user's row (or : → **Edit**). No new invitation is needed; the new role's permissions apply immediately.

Q What's the difference between deactivating and deleting a user?

Setting **Status** to inactive keeps the record but removes access. **Delete** removes the user record entirely. To revoke access temporarily, set inactive rather than deleting.



Roles & Permissions

A role is a named set of permissions, scoped to one account. You build roles from a grid of View / Edit / Delete toggles, then assign them to users.

Create a role and set permissions

BEFORE YOU START

Decide which **Account** the role belongs to — roles are scoped to a single account and won't appear under another.

1. Go to **Admin Console** → **Users** → **Roles** and click **Add Role** (top-right).
2. Type a **Role Name**.
3. Choose the **Account** from the dropdown.
4. Set permissions using the **View / Edit / Delete** toggles for each area. Rows are grouped under **Company, Fleet, Operations** and **Admin Console**; many expand into sub-modules (click a row like AIS Tracker, SMS, Team, Accounting, Shipyard ERP, Integrations or Users to reveal its sub-items).
5. Click **Save**.

The new role appears as a card on the **Roles** tab showing its name and a **"0 users assigned"** count, and becomes selectable in the Invite User **Role** dropdown and the per-user Role column.

ROLE MISSING WHEN INVITING?

Check you selected the correct **Account** — roles only show for their own account. If toggles seem to reset, make sure you clicked **Save**, not Cancel.

Edit or delete a role

BEFORE YOU DELETE

Deleting a role that still has users assigned leaves those users without that role — check the **"X users assigned"** count on the card first.

1. On the role's card (**Roles** tab), click **Edit** to change it or **Delete** to remove it.
2. If editing, the dialog opens pre-filled with the Role Name, Account and all permission toggles — adjust and click **Save**.

Edits apply to everyone currently assigned the role.

How permissions work (View / Edit / Delete)

Access is granted **per-action**, not just per-module — a role can *View* Accounting but not *Edit* or *Delete* in it. Permissions mirror the app's main areas:



GROUP	INCLUDES
Company	Dashboard, Profile.
Fleet	Yachts, AIS Tracker, SMS.
Operations	Management, Smart Documents, Shipyard ERP, Team, Accounting, File Manager, Reports, Integrations.
Admin Console	Company, Yacht, Users, Billing.

Expandable rows break down further — for example **Team** splits into Personal Information, Employment, Payroll, Certificates, Leave and Emergency Contacts, each with its own View/Edit/Delete row.

ROLES ARE ACCOUNT-SCOPED

The **Account** dropdown at the top of the role dialog determines which account the role applies to. If a user's access looks wrong, the role was often created under a different account than expected.

Invite User

Invite people into an account and assign each an existing role. You can queue several before sending all invitations together.

Invite a user

BEFORE YOU START

The **role** you want to assign must already exist on the **Roles** tab — the Role field only lists existing roles. Have the person's email ready.

1. Go to **Admin Console** → **Users** → **Invite User**.
2. Fill in **First Name**, **Last Name** and **Email**.
3. Choose a **Role** from the **Select Role** dropdown (e.g. Fleet Manager, Yacht Manager, Crew Manager, Safety Manager, Technical Manager, Accounting).
4. Turn on the **Send Email** toggle to email the invitation.
5. Click **Add** to add the person to the invite list.

You can queue several people before sending: *"Build a list of users to invite, then send all invitations together."* Once sent, invitees appear in the **Users** tab with a status.

"ROLE IS REQUIRED"?

You tried to add the user without picking a role — select one and try again. If the role you want isn't listed, create it first on the **Roles** tab under the right **Account**.

Users

The Users list is every user in the account — change roles and status inline, or open a full user record to edit their profile.

Manage users

1. Go to **Admin Console** → **Users** → **Users**.
2. The table shows **Name, Email, Country, Rank, Role, Status, Last Signed In, Account Name** and **Actions** (scroll horizontally to see all columns).
3. To change a user's **Role**, use the inline **Select...** dropdown in the Role column.
4. To change **Status**, use the inline dropdown in the Status column (active / inactive).
5. For more options, click the : Actions menu and choose **Edit, Delete** or **Send Email**.

Inline Role/Status changes apply immediately to that row.

The full user record

Edit opens the full record (**User** → **Edit**) with tabs: **Account, Change Password, Personal Information, Address, Employment, Certificates, Leave, Emergency Contact, File Manager** and more. The **Account** tab includes **Profile Branding** (cover image, profile picture) and **Account Identity** (Username, First Name, etc.). Edits save to that user's profile.

"NO ROWS TO SHOW" OR MISSING ACTIONS?

An empty table means no users exist yet (invite one) or the list is still loading. The **Actions** column is the last column — scroll right. Use the page-size selector (default 10) and pagination at the bottom to move through users.

FAQs

Q Can I change a user's role without re-inviting them?

Yes — use the inline **Role** dropdown on the user's row (or : → **Edit**). No new invitation is needed.

Q What's the difference between deactivating and deleting a user?

Setting **Status** to inactive keeps the record but removes access. **Delete** (: → **Actions**) removes the record entirely. To revoke access temporarily, set inactive rather than deleting.



09 ACCOUNTING 6 SECTIONS

Introduction

Accounting is where you plan budgets, track spend by category, compare budget against actuals, and record and manage a yacht's financial transactions — all in one place.

What's inside

Four screens, each under **Accounting**:

- **Budget** — plan how much each category can spend, month by month.
- **Category** — see actual spend grouped by category (what really happened).
- **Budget vs Actual** — compare the two, with variance, a heatmap and a monthly grid.
- **Transactions** — record and manage expenses, income, transfers and more.

Before you start

PRIMARY CURRENCY REQUIRED

You can't create transactions until a **Primary Currency** is set for the yacht (**Admin Console** → **Settings** → **Currencies**). It's also the currency every report is shown in — see **Currency & FX Rates**.

The same on every screen

- **Filters** narrow by date range, category and more.
- **Export** downloads a report (PDF or spreadsheet).
- **Summary cards** at the top recalculate to match your filters.
- Every report shows amounts in your **primary currency**, whatever currency the transactions were entered in.

FAQs

Q What's the difference between Budget, Category, and Budget vs Actual?

Budget is where you enter planned figures per category per month. **Category** shows actual spend grouped by category. **Budget vs Actual** compares the two and flags over/under-budget categories.

Q Why does it say "Primary Currency Required" when I add a transaction?

No primary currency is configured yet. Go to **Admin Console** → **Settings** → **Currencies**, set one, then return to **Accounting** → **Transactions** → **Add**.

Q What currency are the reports in?

Always your **primary currency**. Amounts entered in other currencies are converted using the FX rate — see **Currency & FX Rates**.



Budget

Plan how much each category can spend, month by month. Budgets are the planned figures that **Budget vs Actual** measures real spend against.

Where to find it: Accounting → Budget.

Before you start

Your Chart of Accounts / budget categories must already exist (e.g. **1.000 CREW**, **2.000 PAYROLL**). Budgets attach to existing categories and their sub-lines — you can't budget a category that hasn't been created.

Set a budget for a category

1. Go to **Accounting → Budget**.
2. Use **Filters → Date Range** to set the budget year (defaults to January–December of the current year).
3. In the **CATEGORY** column, click the arrow on a parent category (e.g. 1.000 CREW) to expand its line items (e.g. 1.100 Accomodation & Utilities).
4. Click the month cell you want to budget (JAN...DEC) — it becomes editable.
5. Type the amount and move off the cell to save.

WHAT HAPPENS NEXT

The cell, the row **TOTAL** (far right) and the summary cards (Total Budget, This Month, Categories, Line Items) all recalculate. Figures are in your primary currency.

Export a budget report

1. (Optional) Set **Filters → Date Range / Category** to scope what you export.
2. Click **Export** (top right).
3. Choose **Detailed Budget Report** or **Simple Budget Report**.
4. Pick the format with the icon beside the option (PDF or spreadsheet) — the file downloads for the filtered period.

Troubleshooting

- **The current month shows in red** — that's the live-month highlight (e.g. JUN), not an error.
- **I can't find a category to budget** — it hasn't been created yet. Budgets only attach to existing categories and line items.

Category

A read-only view of **actual spend grouped by category** over the selected period. It answers one question: where did the money actually go.

Where to find it: Accounting → Category.

What it shows

- Summary cards: **Total Actuals**, **This Month**, **Top Spending** (the highest-spend category) and **Line Items**.
- Expand a category to see its breakdown across the months of the period.
- All amounts are shown in your **primary currency**.
- **Filters:** Category Type · Category · Payment Method · Date Range. **Export** downloads the report.

How it differs from the other reports

- **Budget** holds planned figures.
- **Category** shows actual spend — what really happened.
- **Budget vs Actual** compares the two.

WHERE AN UNALLOCATED AMOUNT SHOWS UP

Figures here are driven by transactions **allocated to a category**. Anything that was never allocated isn't lost — it's grouped under an **Uncategorized** line rather than against a real category. Allocate it (see **Transactions → allocations**) to move it into the right category.

Budget vs Actual

Compares each category's **budgeted** figure against its **actual** spend, and flags what's over or under budget.

Where to find it: Accounting → Budget vs Actual.

Read the report

- Summary cards: **Used %** of total budget, **Over Budget**, **Under Budget**, **Avg Usage** and **Total Saved**.
- Three view toggles (top right, next to Export): **Detailed table** (Budget / Actual / Remaining / Used % per category, with progress bars), **Heatmap view** (variance % per category per month) and **Monthly grid** (Actual / Budget side by side).
- Expand a category row to see its line items. All figures are in your **primary currency**. **Filters** → **Date Range / Category**, then **Export**.

How variance is calculated

MEASURE	HOW IT'S WORKED OUT
Remaining	Budget – Actual (a positive number is budget left; the report sums it as Total Saved)
Used %	Actual ÷ Budget — over 100% is Over Budget ; at or under is Under Budget / on track
Heatmap variance	The same comparison as a % per month — GREEN under, RED over

GOOD TO KNOW

Actuals come from transactions, so only spend that is **approved and allocated** to a category counts against its budget.

Troubleshooting

- **Used % shows over 100% / red** — actuals exceeded the budget for that category (it counts toward Over Budget).
- **A month shows “—” in the heatmap** — there's no budget and/or actuals for that category-month, so no variance can be calculated.

Transactions

Record and manage every financial transaction — expenses, income, transfers and more. Each one moves through a fixed lifecycle, which is why the actions on a row change with its status.

Where to find it: Accounting → Transactions.

BEFORE YOU START

A **Primary Currency** must be set first, or the create form blocks you: "Primary Currency Required." Set one under **Admin Console → Settings → Currencies**.

Record a transaction

1. Go to **Accounting → Transactions** and click **Add**.
2. Choose the type tab: **Expense / Income / Withdrawal / Transfer / Refund / Adjustment**.
3. Fill the header: Amount, Payment Method, Transaction Date, Due Date, From Account, Currency, Supplier, Type and Description. (The Transaction ID is generated automatically, e.g. Aqu-2026-jun-0001.)
4. Under **Classification / Allocations**, click **Add Allocation**, pick a **Chart Account** and enter its **Amount**. Add more rows to split across accounts.
5. (Optional) Add **Notes** and drag files into **Documents** (PNG, JPG, PDF, DOC, XLS — max 100 MB).
6. Click **Create**.

WHAT HAPPENS NEXT

The transaction saves as a **DRAFT**. Drafts aren't counted as approved spend — they must be sent for approval (see the lifecycle below).

Allocations & reconciliation

A single transaction can be split across multiple Chart Accounts. The form continuously reconciles four numbers — **Transaction Amount**, **Total Allocated**, **Categorized** and **Uncategorized**. The goal is for Total Allocated to equal the Transaction Amount so **Uncategorized reaches 0.00**.

If the transaction is in another currency, each row also shows its **Primary Eqv.** — the amount converted to your primary currency at the transaction's FX rate. That converted figure is what reaches the reports.

WHY THIS MATTERS

Any unallocated remainder stays **Uncategorized**. It still appears in the Category and Budget vs Actual reports — but grouped under an **Uncategorized** line rather than against a real category. Finish the allocation so the amount is counted where it belongs.

The transaction lifecycle

Every transaction moves through the same core statuses — **Draft → Pending Approval → Approved** — and can be **Reversed**. A new transaction is created as a Draft; from the row menu you **Send for Approval**; once approved it's final.



PAID / UNPAID APPLIES TO EXPENSES ONLY

Only **expenses** have a payment step: an approved expense shows as **UNPAID** until it's paid (individually or via **Bulk Payment**), then **PAID**. **Income, Withdrawal, Transfer, Refund and Adjustment** have no payment step — they're complete once **Approved**.

ROW STATUS	ACTION MENU
Draft	View, History, Edit , Send for Approval, Delete — still editable and removable
Approved / Paid	View, History, Reverse , Lock — correct it by reversing, or freeze it with Lock

The practical rule: if you can't **Edit** or **Delete** a transaction, it's past Draft — use **Reverse** to undo a finalized entry.

WHAT LOCK DOES

Lock freezes a transaction's amounts and FX rate. A locked transaction is the *only* kind that won't be re-priced if someone later updates the exchange rate for its period — see **Currency & FX Rates**.

Pay several expenses at once — Bulk Payment

WHAT'S INCLUDED

Bulk Payment only lists **expenses** that are **Approved and Unpaid**, and only for **one vendor at a time**. Drafts, already-paid items, other vendors and non-expense transactions won't appear.

1. Go to **Accounting** → **Transactions** and click **Bulk Payment**.
2. Use the search box or the chips — **All / Overdue / Due Soon / This Month** — to find the vendor's expenses.
3. Tick individual expenses, or use **Select all**.
4. (Optional) Enter a **Reference Number**.
5. Review **Payment Overview** (vendor, count) and **Total by Currency**.
6. Click **Confirm Bulk Payment (n)**.

WHAT HAPPENS NEXT

The selected expenses are marked **Paid** and drop out of the unpaid pool; the Expense card's unpaid balance updates.

Filter & export the list

Click **Filters** and narrow by Transaction Date, Created Date, Transaction Type, Status, COA, Transaction Currency, Contact, Account or Search — or type in the **Search** box (ID, description, amount). To export, click **Export** → **Transactions Report** and choose PDF or spreadsheet. The grid and the summary cards (Expense, Income, Withdrawal, Transfer, Refund) recalculate to match.

Troubleshooting

- **"Primary Currency Required" banner** — set one under Admin Console → Settings → Currencies.





- **Total Allocated doesn't match Transaction Amount** — adjust allocation rows until Uncategorized is 0.00.
- **Can't pick a Supplier / Account** — those records must exist first; create them in their setup areas.
- **Can't edit or delete a transaction** — it's past Draft. Use **Reverse**.
- **An approved transaction's amount changed on its own** — the FX rate for its period was updated; unlocked transactions are re-priced automatically. Lock it to freeze it.
- **An expense isn't listed in Bulk Payment** — it's a Draft, already Paid, or belongs to a different vendor.

FAQs

Q Why does it say "Primary Currency Required" when I add a transaction?

No primary currency is configured. Set one under **Admin Console** → **Settings** → **Currencies**, then return to Transactions → Add.

Q Why can't I edit or delete a transaction?

Edit and Delete are only available while a transaction is a **Draft**. Once approved or paid, use **Reverse** to correct it, or **Lock** to freeze it.

Q Do income or transfers get marked Paid?

No. Only **expenses** have a Paid/Unpaid step. Income, Withdrawal, Transfer, Refund and Adjustment are complete once **Approved**.

Q Why isn't an expense showing in Bulk Payment?

Bulk Payment only lists **Approved and Unpaid expenses** for **one vendor**. Drafts, paid items, other vendors and non-expense types are excluded.

Q Can I split one transaction across multiple accounts?

Yes. Under **Classification / Allocations**, click **Add Allocation** for each Chart Account and enter its amount — keep adding rows until **Uncategorized** reads 0.00.



Currency & FX Rates

How multi-currency works in Accounting — your primary currency, exchange rates, and what happens to existing transactions when a rate changes.

Where to find it: Admin Console → Settings → Currencies.

Primary currency

- Each yacht has one **primary currency** — the currency every Accounting **report** is shown in, whatever currencies the transactions were entered in.
- Set it under **Admin Console → Settings → Currencies** → the **Primary Currency** pencil → **Select Primary Currency**.
- It must be set before you can create any transaction.

CHOOSE IT CAREFULLY

Once transactions exist you **can't change** the primary currency — "Changing the primary currency is strictly prohibited if transactions exist to preserve ledger integrity."

Exchange (FX) rates

When a transaction is in a different currency from your primary, Aquator converts it with an FX rate — that's the **Primary Eqv.** on its allocations and the amount that lands in your reports.

1. Go to **Admin Console → Settings → Currencies** (you need at least two currencies added to set a rate).
2. On the currency-pair card under **FX Rates**, click **Add / Edit**.
3. Set the **Start Date** (Effective From — required) and an optional **End Date**.
4. Enter the rate (**1 FROM = X TO**); the inverse fills in automatically. Click **Save**.

GOOD TO KNOW

Rates are **dated**, so each pair keeps a history — the rate effective on a transaction's date is the one used. Deleting a rate restores the previous one as the active rate.

Updating a rate re-prices existing transactions

IMPORTANT

When you add or change an FX rate, Aquator **automatically re-prices every transaction dated within that rate's period** — including ones that are already **Approved** or **Paid**. Their primary-currency amounts, allocations and the figures in your reports all update, and each change is recorded in the transaction's **History**.

- **Which transactions update:** any *unlocked* transaction (Draft, Pending Approval, Approved or Paid) whose date falls in the rate's effective window and uses that currency pair.
- **What's protected:** a **Locked** transaction is never re-priced — Lock it to pin its amounts to the rate that was in force. Reversed transactions are left alone too.



FAQs

Q Why did an approved (or paid) transaction's amount change?

Someone updated the FX rate covering that date. Unlocked transactions in the period are re-priced automatically so reports stay consistent. To freeze one, open its row menu and choose **Lock**.

Q How do I stop a transaction from changing when rates update?

Lock it (row menu → Lock). A locked transaction keeps its amounts and FX rate no matter what later rate changes are made.

Q What currency are reports in?

Always your **primary currency**. Other-currency amounts are converted using the FX rate effective on each transaction's date.

Q Can I change my primary currency later?

Not once transactions exist — it's locked to protect ledger integrity. Set it correctly before you start recording transactions.

Introduction

Plan, schedule, and run charters end-to-end — bookings, guests, money (APA & payments), tasks, the scheduling calendar, and charter documents.

Where to find it

Open from **Home > Applications > Charter**, then pick a view from the Charter sidebar.

What's inside

The Charter module's core areas, all under **Charter**:

- **Calendar** — the scheduling hub for charters and activities.
- **Task Tracker** — the task grid, with inline editing, filters and saved views.
- **Charter Details** — create and list charters (bookings).
- **Payment Details** — the fee structure per charter (charter, fuel, APA fees).
- **APA** — the guest's pre-paid spending allowance and remaining balance.
- **Guest Profiles** — guests, the IMO passenger list and exports.

SUBCOLLECTION: SMART DOCUMENTS

Smart Documents (Editor + Templates) lives under Charter and supplies the contracts you select on a charter.

Passage Planning (Passage Preparation, Plan, Log, Power Usage, Fuel Management) also sits under the Charter sidebar but is operationally distinct and documented separately.

A natural order of work

- Add guests in **Guest Profiles** — they become selectable on a charter.
- Create the booking in **Charter Details** (a guest and a contract are required).
- Schedule on the **Calendar** and run the work through **Task Tracker**.
- Track the money in **Payment Details** and **APA**.

FAQs

Q Why do some screens say "No Rows To Show"?

Payment Details, APA and Guest Profiles populate as charters and guests are set up. An empty grid means nothing has been created yet (or a filter is applied).

Q Where do contracts come from?

From **Smart Documents** — the Contract field on a charter is a dropdown sourced there.

Charter Details

Charter Details is where you create a booking and see every charter as a row. A charter needs an existing **guest** and a **contract** before it can be saved.

Add a charter

BEFORE YOU START

The **Primary Guest** must already exist in **Guest Profiles** (it's a dropdown, not free text), and have a **Contract** ready — it's required and selected from Smart Documents.

1. Go to **Charter > Charter Details** and click **Add** (top right).
2. Enter the **Charter Name**.
3. Choose a **Type** (see below for what each means).
4. Select the **Primary Guest Name** from the dropdown.
5. Set **Charter Start Date** and **Charter End Date** — **Number Of Days** calculates automatically and is read-only.
6. Fill in **Pick Up Location** and **Drop Off Location**.
7. Set **Status**, **Central Agent** and **Currency**.
8. Add any **Notes**, select the required **Contract**, and optionally attach files under **Images / Files**.
9. Click **Save**.

The charter appears as a new row in the list (Name, date range, Type, Guest, Pick Up, Drop Off, Status, Central Agent).

GOOD TO KNOW

If the guest you want isn't in the **Primary Guest Name** dropdown, add them in **Guest Profiles** first. **Number Of Days** is derived from the dates — set both dates rather than editing it. A **Contract** selection is mandatory before saving.

How charter types work

The **Type** drives how a charter is categorized and how fees, the calendar and reporting treat it — a misclassified trip can surface in the wrong place later.



TYPE	WHAT IT MEANS
Charter	A standard paid booking.
Owner	The owner using the vessel, rather than a paying guest.
Yacht Only (Half Day / Full Day)	The vessel without the full provisioning package, split into half- and full-day options.
All Inclusive (Half Day / Full Day / All Inclusive)	Bundles provisioning and services, with half-day, full-day and a general option.
Transfer	Point-to-point repositioning with guests aboard.

Task Tracker

Task Tracker is a grid of charter tasks you can add, edit inline, filter and save into views. Everything here lives under **Charter > Task Tracker**.

Add a task

BEFORE YOU START

Know who you're assigning to — **Assign To User** lists crew members and supports multiple assignees (each shows as a removable chip).

1. In **Task Tracker**, click **Add**.
2. Enter a **Title** (and optionally an **ID**).
3. Optionally click **+ Add Sub Task** to break the task down.
4. Set a **Due Date** (date + time) — once set, a **Schedule** field appears for recurrence.
5. Choose one or more users under **Assign To User**.
6. Set **Priority** (None, Low, Medium, High) and **Department** (Accounting, Admin, Bridge, Crew, Deck, Engineering, Interior, Galley and more).
7. Add a **Description** and any **Images / Files** (PNG, JPG, PDF, DOC, XLS · max 100 MB).
8. Click **Save**.

The task appears in the grid with its ID, Due Date, Assignee, Priority and Status.

DUE DATE IS REQUIRED

If the Due Date field shows a red border, set it before continuing — the form needs a due date to save.

Update a status (and other inline edits)

1. Find the task row in the grid.
2. In the **Status** column, click the dropdown chevron on that row.
3. Pick the new status: Open, On Hold, In Progress, Done, Approved or Rejected.

A **Processing...** indicator briefly appears and the change saves automatically — no separate save button. The change persists on refresh.

TIP

Let the **Processing...** indicator finish before navigating away, so the edit is committed.

Recurring schedules

The **Schedule** field appears only after a **Due Date** is set. It controls whether the task repeats: **None, Daily, Weekly, Monthly** or **Yearly**. "None" makes it a one-off; the others regenerate the task on that cadence relative to the due date. No Schedule field means no due date is set yet — it's hidden until then.

Filter and save a view



1. Click **Filters**.
2. Under **Filter By**, choose any of: Assign To User, Due Date, Priority, Department, Status.
3. Apply your selections — an active filter shows a count badge and the banner reads **Active View** with the number applied.
4. Click **Save View** to keep this filter set, or **Clear All** to reset.

The grid filters to matching tasks. You can also switch layouts using the table / split / calendar view icons next to Filters.

LIST LOOKS INCOMPLETE?

You likely have an **Active View** filter applied (e.g. a Status filter). Click **Clear All** to see everything.

FAQs

Q Why doesn't the Schedule field show?

It only appears after a Due Date is set. Set the due date and the Schedule (recurrence) field appears.

Q Do I need to click Save after an inline status change?

No — inline edits auto-save once the **Processing...** indicator finishes.

Q Can a task have more than one assignee?

Yes — Assign To User supports multiple crew members, each shown as a removable chip.

Payments & APA

The Charter module separates the fixed charter money from the spending float: **Payment Details** is the billing summary, **APA** is the pre-paid allowance and what's left of it.

Payment Details

Tracks the charter's fee structure, with columns for **Charter Fee**, **Fuel Fee**, **APA Fee** and **Total** per guest/charter — the high-level billing summary.

APA (Advance Provisioning Allowance)

Tracks the guest's pre-paid spending pot, with columns for **Type**, **APA** and **Balance**, so you can see how much of the allowance remains as expenses are drawn down.

How records appear here

Both screens are tied to charters and guests, so rows appear as charters are set up rather than being created from scratch. When both are empty you'll see **"No Rows To Show."**

IN SHORT

Payment Details = what the charter is billed (fees & total). **APA** = the spending float and remaining balance.

Guest Profiles

Guest Profiles holds the people on your charters. A guest must exist here before they can be set as the **Primary Guest** on a charter.

Add a guest profile

1. Go to **Charter > Guest Profiles** and click **Add**.
2. Enter the guest's details (First Name, Last Name, Email, Phone, etc.).
3. Click **Save**.

The guest appears in the grid (First Name, Last Name, Email, Phone, Charters) and becomes selectable as a **Primary Guest Name** when adding a charter.

Passenger list & export

Use **IMO Passenger List** to produce the passenger manifest, and **Export** to download the list. Like other Charter grids, you can filter and **Save View**.

GUEST LIST EMPTY?

"No Rows To Show" means no profiles exist yet — add one.

Calendar

The Calendar is the scheduling hub for the Charter module — charters as spanning bars and individual activities as color-coded time blocks.

What it shows

Charters (e.g. Charter #09 "Beach Holiday") appear as spanning bars, while activities (watersports, guest drop-offs, land excursions) appear as color-coded time blocks.

Views and display

Switch between **Day**, **Week**, **WorkWeek**, **Month**, **Year**, **Agenda** and **Timeline Views**, and toggle **Gridlines**, **Row Auto Height** and the **Toolbar**. **Settings** lets you tune the display.

Scheduling and sharing

- Use **New Recurring Event** to schedule repeating items.
- Use **Today** to jump to the current date.
- Use **Print** or **Export** to share the schedule.

Introduction

Yacht Plans & Subscription is where you choose a plan, start a free trial, pay, and manage everything about your subscription — all from one place.

Plans for every vessel

There are three plan families, sized to your vessel and operation:

- **Yacht Plans** — Starter, Essential, Advanced and Pro, priced by yacht length (LOA).
- **Superyacht Plans** — Alpha through Foxtrot, for larger vessels (24m and above).
- **Business Plans** — Fleet, Refit and Owner Oversight, for multi-vessel and portfolio operations (custom-priced).

Free trial

Every paid plan starts with a **14-day free trial** — no credit card required. You get full access to everything in your chosen plan so you can explore before you commit.

Billing cycles

Choose **Monthly** or **Annual** billing at checkout. Annual billing saves **15%** on standard subscription plans (the discount does not apply to add-ons).

Where everything lives

You manage your subscription under **Admin Console** → **Billing**, which has three tabs:

- **Subscription** — your current plan, add-ons, payment methods and cancellation.
- **History** — a timeline of every change.
- **Invoices** — downloadable invoice PDFs.

GOOD TO KNOW

Two things to remember: plan upgrades and downgrades are locked once a plan is approved, and 'Cancel subscription' turns off auto-renew rather than cutting access immediately. Both are explained in the sections that follow.

Plans & Pricing

Every plan family, side by side — pick the tier that matches your vessel's length and how you operate. The figures below are indicative; the always-current pricing lives at aquatormarine.com/pricing.

Choose your plan

Pick a plan to see its details and add-on modules. Each add-on shows an **Included** link when the plan already covers it, otherwise it shows that tier's price.

Select plan

Billing cycle

Yacht Plans (single yachts up to 80ft)

Transparent per-vessel pricing by length (LOA). Every Yacht Plan includes **8 core modules** — Profile, Task Management, Chat, Maintenance Manager, Certificate Tracking, Settings, File Manager and Calendar — plus mobile access and 24/7 support.

PLAN	LENGTH	ANNUAL	MONTHLY	USERS	HIGHLIGHTS
Starter	Under 50ft	Free	—	2	8 core modules, mobile access, 24/7 support, add-on modules available
Essential	50–60ft	\$99/yr	\$9/mo	4	Adds Maintenance Tasks, Equipment List and Inventory List
Advanced	60–70ft	\$299/yr	\$29/mo	6	Everything in Essential, plus Accounting Transactions and Budget
Pro	70–80ft	\$999/yr	\$99/mo	8	Everything in Advanced, plus Crew Lists, Crew Leave & Payslips and 1 integration

Additional users \$60/year each.

Superyacht Plans (24m and above)

Enterprise-grade pricing by vessel length. Every Superyacht Plan includes **all 10 core modules** — Profile, Yacht Management, PMS, Accounting, Finance, ISM, File Manager, Settings, Reports and In/Out Board — plus the AI Support Agent, knowledge base and training demos.



PLAN	LENGTH	ANNUAL	MONTHLY	USERS	INCLUDED
Alpha	24–35m	\$2,500/yr	\$245/mo	4	Extra modules as add-ons
Bravo	35–50m	\$4,000/yr	\$390/mo	6	1 integration, settings setup
Charlie	50–65m	\$7,000/yr	\$685/mo	9	2 integrations, PMS data migration
Delta	65–80m	\$13,000/yr	\$1,275/mo	12	3 integrations, PMS + Accounting migration
Echo	80–100m	\$20,000/yr	\$1,960/mo	18	4 integrations, PMS + Accounting migration, Assist support included
Foxtrot	100m+	Custom	—	Custom	All integrations, full data migration, dedicated account team, bespoke reporting

Additional users \$120/year each.

Operational support services

Optional managed-support tiers you can add to any plan:

SERVICE	PRICE	BEST FOR	INCLUDES
Assist	\$500/mo	Established fleets running smoothly	Monthly check-in, platform health review, usage optimisation, 4-hour priority response
Plus	\$1,500/mo	Growing fleets and active charters	Weekly check-in, dedicated WhatsApp channel, proactive compliance monitoring, quarterly review
Pro	\$3,000/mo	Enterprise fleets and complex portfolios	Strategic advisory, annual onboard visit, priority custom development, dedicated account manager

Data & Setup Services

One-time services to get your vessel up and running on Aquator:

Platform Setup

Initial configuration of your Aquator environment — settings, roles, permissions, and core module setup.

Included

Included with every plan

Data Migration

Structured migration of your existing records into Aquator. Includes PMS assets, accounting history, crew records, ISM compliance data, budgets, and more. Scoped per vessel based on data volume and complexity.

From \$2,500

Per migration scope

Accounting Setup

Import your chart of accounts, transactions, opening balances, and COA mapping into the Accounting module.

\$2,000

One-time fee





SMS Setup

Populate your safety management system with versioning, approvals, and compliance documentation.

\$2,000

One-time fee

Billing at a glance

- **14-day free trial** on any paid plan — no credit card required.
- **Annual billing saves 15%** versus monthly on standard plans (the discount does not apply to add-ons).
- Monthly billing is available on every priced tier.

PRICES MAY CHANGE

The figures here are a guide. For the latest pricing and any current offers, see aquatormarine.com/pricing or ask our team.

Custom & Business Plans

For multi-vessel operations, shipyards and owner-side teams, Aquator offers **custom-quoted Business Plans** — priced by conversation, not by the module — alongside the bespoke **Foxtrot** tier for the largest vessels.

Fleet Management

For yacht management companies, charter operators and fleet managers (typically 5–50 vessels).

- Multi-vessel fleet dashboard with live KPIs
- Planned maintenance system (PMS) across all vessels
- Crew lifecycle — certs, rotations, leave, payslips
- ISM, ISPS and MLC compliance automation
- Multi-currency accounting and financial reporting
- Charter module — bookings, APA, guest profiles
- Owner reporting, per vessel and fleet-wide
- Custom integrations and API access

Refit & Project

For shipyards, refit operations and new-build facilities. Scoped by active project count, team size and ERP modules.

- Gantt project management with critical-path tracking
- Subcontractor coordination and work-order management
- Refit scoping, budgeting and spend tracking
- Warranty tracking and claims management
- Client reporting portal and milestone sign-off
- Technical documentation and GA plan management
- New-build ERP suite (optional)
- Digital vessel handover package

Owner Oversight

For family offices, private wealth managers and owner-side teams. Scoped by portfolio size, reporting requirements and wealth integration.

- Full portfolio financial dashboard — actual vs budget
- Asset depreciation tracking and valuation trail
- Charter P&L — income, broker commissions, APA
- Approval workflows for expenses above a threshold
- VAT and tax reporting by jurisdiction
- Insurance and certificate renewal tracking
- Manager performance and spend analytics
- Custom owner reporting cadence and format



Every Business Plan includes platform setup, custom configuration, team training, unlimited vessels, dedicated onboarding, priority support, data migration and custom integrations. Most clients go live within 48 hours.

GET A QUOTE

Business Plans and Foxtrot are tailored to your operation. Click **Get in touch** on a custom plan in Billing, or contact info@aquatormarine.com, to get a quote.

Account & Registration

Create your account, verify your email, and choose the plan that fits your vessel.

Sign up & choose a plan

1. Open the **Get Started** page and click **Continue**.
2. **Account** — enter your name, email and password (or continue with Google / Apple), then click **Continue**.
3. **Verify Email** — type the 6-digit code we email you and click **Verify**. Use **Resend** if it does not arrive.
4. **Profile** — add your vessel, role and company details, then click **Next**.
5. **Plan** — choose your plan: click **Get Started Free** for the free plan, or **Start 14-Day Free Trial** for a paid plan.

AFTER YOU FINISH

You are taken to the **Login** page. Your account is reviewed and approved by our team — typically within 24 hours — before you can log in. See the FAQs below.

FAQs

Q How does the account registration and approval process work?

Once you complete [registration](#), your account is submitted for verification. Our admin team reviews your details and approves your account — **typically within 24 hours**.

You will receive a confirmation email once your account has been approved. Only after approval will you be able to log in and access the platform.

Approval timeline: Account verification is completed within **24 hours** of registration on business days. If you have not received an approval email after 24 hours, please contact info@aquatormarine.com.

Q Why can't I log in after registering?

Access to the platform is granted **only after your account has been reviewed and approved by our admin team**. If you have just registered, please allow up to 24 hours for the verification process to complete.

Once approved, you will receive a confirmation email with a link to log in. If you have been waiting longer than 24 hours, please reach out to info@aquatormarine.com and our team will assist you.

Free Trial

Try Aquator free for 14 days with full access to your plan's features — no credit card needed.

Start your free trial

1. On the **Plan** step at sign-up (or on a plan card in **Billing**), click **Start 14-Day Free Trial**.
2. Confirm in the **Free Trial** dialog by clicking **Start Free Trial**.
3. Your trial begins immediately — you will see 'Free trial started!' and the days remaining on your Subscription tab.

When the trial ends

After 14 days your account is paused until you activate a paid subscription. **You are never charged automatically**, and we email a reminder before the trial ends so you have time to decide.

NEED MORE TIME?

Trial extensions are available case-by-case — contact support with your account email and the reason for the extension.

FAQs

Q How long is the free trial period?

Your free trial lasts **14 days** from the moment you [sign up](#) — no credit card required. You will have full access to all features included in your chosen plan during this period so you can explore everything before committing.

Q What happens when my free trial ends?

Once your 14-day trial expires, your account is paused until you activate a paid subscription. **You will not be charged automatically**. We will send a reminder email before the trial ends so you have time to decide.

Q Can I extend my free trial beyond 14 days?

Yes — trial extensions are available on a case-by-case basis. To request one, please contact the support team at info@aquatormarine.com. Extensions are granted at their discretion, typically for valid evaluation or business reasons.

How to request: Reach out to the [support team](#) with your account email and reason for the extension. Allow 1–2 business days for a response.

Subscription & Plan

Activate a paid plan, see your current subscription, and control auto-renewal.

Open Billing

1. In the left sidebar, open **Admin Console**.
2. Click **Billing** to open the Billing page on the **Subscription** tab.

Subscribe to a plan

From the **Subscription** tab, here is what each button does:

YOU CLICK	WHAT HAPPENS
Subscribe / View Plan	Opens the Plan Detail dialog.
Annual / Monthly toggle	Switches the prices shown (Annual saves 15%).
Add-on checkboxes / steppers	Updates the running total in the dialog.
Proceed to Checkout	Takes you to the Checkout page to pay.
Get in touch	For custom-priced plans — contact sales.

Auto-renew & cancelling

- Your plan renews automatically each cycle. We email a reminder **7 days before** renewal.
- Click **Cancel subscription** to turn off auto-renew — you keep access until the period ends.
- Changed your mind? Click **Don't cancel** to switch auto-renew back on.

CANCELLING DOES NOT END ACCESS IMMEDIATELY

'Cancel subscription' turns off auto-renew. Your subscription stays active until the end of the current billing period, and you can reverse it any time before then.

PLAN CHANGES ARE LOCKED AFTER APPROVAL

Once a plan is approved and active, upgrades and downgrades are not available during the billing cycle. Contact support to discuss your options at renewal.

FAQs

Q How do I activate my subscription after the trial?

Head to [Admin Console](#) → [Billing](#) → [Subscription](#) in your dashboard. Select the plan that fits your vessel or fleet, add your payment method, and confirm. Your plan activates immediately upon approval.



Q Can I upgrade or downgrade my plan after it's been approved?

Once your subscription plan has been **approved and activated, plan changes — upgrades or downgrades — are not permitted** during the active billing cycle. This ensures pricing integrity and service consistency for all accounts.

If your needs change significantly, please contact our [support team](#) to discuss your options at the next renewal cycle.

Important: Plan modifications are locked upon approval. Review plan tiers carefully during setup — your account manager can help you choose the right fit before confirming.

Q How does auto-renewal work?

Your subscription renews **automatically** at the end of each billing cycle (monthly or annually, depending on your plan). We send an email reminder **7 days before renewal**. You can turn off auto-renewal at any time from [Admin Console → Billing → Subscription](#) (cancel or resume auto-renew).

Q Can I cancel my subscription?

Yes, you can cancel at any time. Go to [Admin Console → Billing → Subscription](#) and use the cancel subscription option. Your access continues until the end of the current billing period — you will not be charged again after cancellation.

Add-Ons

Add-ons extend your plan with extra modules or seats. They are available once you are on a paid subscription.

Add an add-on

1. Go to **Admin Console → Billing → Subscription** and find **Manage Add-ons**.
2. Click **Add-on** and choose the add-ons you want (set a quantity where shown).
3. Click **Confirm** to purchase. The cost is pro-rated from today.

Remove an add-on

1. In **Manage Add-ons**, click **Remove Add-on** and select the one to remove.
2. Confirm — it stays active until the period ends, then will not renew.
3. Changed your mind? Click **Undo** before the period ends to keep it.

YOU CLICK	WHAT HAPPENS
Add-on	Opens the dialog to choose and confirm new add-ons.
Remove Add-on	Schedules an add-on to end at the period's close.
Undo	Cancel a scheduled removal so the add-on keeps renewing.

FAQs

Q Can I add add-ons to my subscription?

Yes. Add-ons are available **after you have activated a paid subscription**. Browse and purchase from [Admin Console → Billing → Subscription](#) (Manage Add-ons). Each add-on is billed in addition to your base plan and itemised separately on your invoice.

Q Are add-ons available during the free trial?

Add-ons are **not available during the free trial period**. They become accessible once you have transitioned to an active paid plan, ensuring they are correctly billed and aligned with your subscription.

Q How are add-ons billed?

Add-ons are charged on a **pro-rated basis** from the date of purchase, then included in your regular renewal going forward. They appear as separate line items on your invoice for full transparency.

Q Can I remove an add-on I no longer need?

Yes. Go to [Admin Console → Billing → Subscription](#) (Manage Add-ons), select the add-on and click *Remove*. It stays active until your current billing period ends and will not renew after that.



Q Does the 15% annual discount apply to add-ons?

The **15% annual discount applies to standard subscription plans only** (Yacht Plans and Superyacht Plans). It does **not** apply to add-ons.

Add-ons are billed at their standard rate regardless of whether you are on a monthly or annual subscription. The discounted pricing you see at checkout reflects your base plan savings — your add-on line items will always show their full price.

Summary: Base plan — 15% off when billed annually. Add-ons — always billed at standard rate, no annual discount.

Billing & Payment

Pay securely, manage your cards, and find every invoice and transaction.

Checkout & pay

1. From the **Plan Detail** dialog, click **Proceed to Checkout**.
2. Review your order on the left, then on the right either select a **saved card** or click **Add new payment method** and enter your card.
3. Click **Subscribe**. You will see 'Subscription activated successfully!' and return to the Billing page.

Use **Back to Plans** at any time to return to Billing without paying.

Payment methods

YOU CLICK	WHAT HAPPENS
Add Method	Opens the secure card form to save a new card.
Set as Default	Makes that card the default used for renewals.
Remove	Deletes a saved card (you cannot remove the default).

Invoices & history

- **Invoices tab** — download invoice PDFs; click **Sync** to refresh the list, or the eye icon to view a single invoice.
- **History tab** — a read-only timeline of cancellations, add-on changes, refunds and more.

FAQs

Q How do I update my payment method?

Go to [Admin Console → Billing → Subscription](#) (Payment methods) and add or update your card. Your next billing cycle will use the updated method automatically.

Security: All payment data is encrypted end-to-end. Aquator Marine never stores raw card numbers on its servers.

Q Where can I view my billing history?

Your complete billing history is available under [Admin Console → Billing](#), on the **History** tab. It lists every past transaction — date, amount, plan, and payment method — going back to your very first charge.

Q How do I download or view my invoices?

Invoices are generated automatically after each successful payment. Access them from [Admin Console → Billing](#), on the **Invoices** tab. Each invoice is available as a **downloadable PDF** and is also emailed to your registered address, with a full itemised breakdown of your plan and any active add-ons.



Q What happens if my payment fails?

If a payment fails we will notify you immediately by email and automatically **retry the charge up to 3 times** over the following days. If all retries fail, your subscription will be paused until a valid payment is received. [Updating your payment method](#) in Admin Console → Billing → Subscription triggers an immediate retry.

Introduction

The shipyard build-and-procurement module. Define what parts a build needs (Bill of Materials), schedule the work (Planning), track stock (Inventory), and turn material requirements into purchase orders (Purchase List → Purchase Orders).

Where to find it

Open **Shipyard** from the left sidebar — it opens to **Shipyard ERP**. The sub-nav has two groups: **Shipyard ERP** (Bill Of Materials, Planning, Inventory) and **Purchase** (Purchase List, Purchase Orders). Breadcrumb: **Home > Applications > Shipyard ERP > [section]**.

The workflow, in order

The module moves a build from “what materials do we need” to “the parts are on order,” and the sections are meant to be used in that order:

- **Bill Of Materials (BOM)** — list every part a build requires, under numbered **Work Centers** (1. Hull & Structure ... 7. Testing & QA). Each line carries part, supplier, required qty, unit price, lead time and live status badges.
- **Inventory** — your stock record: what’s on hand, free, and allocated to a build. A part’s **Free Stock** can go negative — the signal to order more.
- **Purchase List** — the procurement worklist: parts that still need ordering, grouped by project and work center, each **To Order** or **PO Generated**.
- **Purchase Orders** — the record of POs you’ve raised (PO number, supplier, paid status, paid %, delivery dates).
- **Planning** — schedules the labour per work center (start/end dates, required vs worked hours, completion bar).

What the status badges mean

The BOM and Purchase tables carry several colour-coded status columns that track a part from requirement to payment. They look similar but answer different questions — read each on its own:

BADGE	ANSWERS
Allocation Status	Whether stock is committed to or pulled for the build — e.g. Issued means stock has been issued against this line.
Order Status	Does this still need ordering? To Order (no PO yet) or PO Generated .
PO Status	The purchase order’s delivery progress — e.g. Received once goods arrive.
Paid Status	Payment against the PO — e.g. Partial , alongside a Paid % on the Purchase Orders screen.

THEY’RE INDEPENDENT

A single line can read **Issued / PO Generated / Received / Partial** at once — issued to the build, ordered, delivered, but only partly paid. One badge doesn’t imply the others.



FAQs

Q Why is my Purchase List (or Inventory) empty when I know there's data?

These screens open with a default filter applied (the **Filters** button shows a count badge). Click **Clear All** on the Active View bar, or adjust the filter, to reveal all rows.

Q Can I order more parts than I have in stock?

Yes. When required/allocated units exceed stock on hand, the BOM line's **Free Stock** shows a negative number — the signal it needs procuring. It then surfaces in the Purchase List as **To Order**.



Bill of Materials

The Bill of Materials lists every part a build requires, grouped under numbered Work Centers and Categories. Parts come from Inventory; shortages flow to the Purchase List.

Add a BOM line

BEFORE YOU START

The **Part** must already exist in **Inventory** — the Part dropdown only lists existing items (shown as “Part Name – Part Number”). Know which **Work Center** and **Category** the line belongs to.

1. Go to **Shipyard > Bill Of Materials** and click **Add** (top right).
2. In **Work Center**, select a work center (e.g. “1. Hull & Structure”).
3. In **Categories** (required, labelled red), select one or more — a new “Select...” row appears so you can add more.
4. Under **Part 1**, choose the **Part** and enter **Required Units**.
5. To add more parts to the same line, click **+ Add Part** and repeat.
6. (Optional) Attach files under **Images / Files** (PNG, JPG, PDF, DOC, XLS; max 100 MB).
7. Click **Save**.

A green toast reads “**Bill Of Material added**” and the line appears under its work center/category grouping; the category subtotal and work center total update to include it.

NEGATIVE FREE STOCK ISN'T AN ERROR

A saved line showing **Free Stock** like **-74** means required/allocated quantity exceeds stock on hand — you need to procure more, and the line will appear in the Purchase List.

Edit a BOM line

FIND THE ACTIONS MENU

The **Actions** column is the far-right column of the BOM table — scroll the table horizontally to reveal it. Row cells aren't editable inline; clicking a cell only highlights the row.

1. Scroll the table right to the **Actions** column and click the three-dot (:) menu on the line.
2. Choose **Edit** (the menu also offers **View**, **Delete** and **Create Purchase Order**).
3. Update fields — e.g. Required Units, Work Center, Categories, Part or Actual Delivery Date.
4. Click **Save**.

The line updates in place and the category subtotal and work center total recalculate automatically.

FAQs



Q Where do I find the Edit / Delete options for a BOM line?

In the **Actions** column at the far right — scroll horizontally, then click the **:** icon. The menu has View, Edit, Delete and Create Purchase Order.

Q Can I raise a purchase order straight from a BOM line?

Yes — open the line's **:** menu and choose **Create Purchase Order** (or use **Generate PO** on the Purchase List).

Inventory

Inventory is your stock record of parts. Adding an item here is what makes it selectable later as a **Part** in the Bill of Materials.

Add an inventory item

BEFORE YOU START

You can't set on-hand stock in this form — **Total Stock** notes "Adjust quantity via the adjust stock," so quantity changes happen through a separate stock-adjust action, not the Add form.

1. Go to **Shipyards > Inventory** and click **Add**.
2. Complete the fields: **Name, Part Number, Serial Number, Manufacturer, Supplier, Supplier Description, Categories, Unit Of Measure (UOM), Unit Weight, Unit Price (Supplier), Unit Price (Inventory), Minimum Free Stock** and **Description**.
3. (Optional) Add an image.
4. Click **Save**.

The item appears in the Inventory list with a **QC Status** badge (e.g. "QC Pending" or "QC Done") and is now selectable as a Part in the Bill of Materials.

READING INVENTORY

The three cards at the top — **Total Value of Stock, Total Value of Free Stock, Total Value of Allocated Stock** — summarise your stock value. If the list shows "No Rows To Show," a filter is applied; clear it to see all items.

FAQs

Q Why can't I set the stock quantity when adding an item?

The **Total Stock** field is informational on the Add form ("Adjust quantity via the adjust stock"). Quantity is changed through the separate **stock-adjust** action, not the Add/Edit form.

Purchase

The Purchase group turns material requirements into orders: the **Purchase List** shows what still needs ordering, and **Purchase Orders** is the register of POs you've raised.

Read and use the Purchase List

OPENS FILTERED

The Purchase List opens with a default filter applied (the **Filters** button shows a "1" badge), so it may look empty ("No Rows To Show") on first open. Click **Clear All** on the Active View bar to reveal all rows.

1. Go to **Shipyards > Purchase List**.
2. Review the columns: Project, Work Center, Part Name, Part Number, Unit Price, Order Status, Date To Order, Quantity To Order.
3. Look for lines with Order Status **To Order** — these still need a PO. **PO Generated** lines are already ordered.

Only parts that need ordering appear; fully stocked or already-ordered parts won't show as "To Order."

Generate a Purchase Order

TWO ENTRY POINTS

The **Generate PO** button on the Purchase List, or **Create Purchase Order** in the : Actions menu of a Bill Of Materials line. **Supplier** is required on the form.

1. On the Purchase List, click **Generate PO** (top right) — or use a BOM line's : → **Create Purchase Order**.
2. The **PO Number** is auto-generated (e.g. PO-06-2026-0001). Enter a **PO Title**.
3. Select the **Supplier**.
4. Add line items: choose **Part Name**, then enter **Quantity** and **Cost** — the **Amount** calculates automatically. Click **+ Add an item** for more.
5. (Optional) Use **+ Add taxes and cost** and **+ Add extra fees** to adjust the Subtotal/Total. Set the **Fx Rate** for another currency — **Total (Primary)** shows the converted total.
6. Fill in the **Shipping Address** (scroll down) and **Save**.

The PO appears under **Purchase Orders**, and the related parts move from **To Order** to **PO Generated** in the Purchase List.

TOTAL SHOWS \$0.00?

No line item has a Quantity and Cost yet — add at least one with values. For a wrong-currency total, check the **Fx Rate**; **Total (Primary)** reflects your base currency after conversion.

Track purchase orders

Go to **Shipyards > Purchase Orders** — the live register of all raised POs. Review by **PO Title, PO Number, Supplier, Paid Status, Paid %, Order Date, Delivery Date** (scroll right for more), and use **Search, Filters** or **Export. Paid**



Status (e.g. "Partial") and **Paid %** show payment progress at a glance. **"No Rows To Show"** means no POs have been generated yet.

Planning

Planning is the labour-scheduling view for the build, organised by the same numbered Work Centers as the Bill of Materials.

How Planning works

Each row tracks **Start Date**, **End Date**, **Required Labour Hours** and **Labour Hours Worked**, and the page header shows an overall completion progress bar with a date stamp (e.g. "0% complete as of 08/06/2026"). This is where you compare planned effort against logged effort per work center to see how the build is tracking.

Because it uses the same numbered work centers as the BOM, the two views line up. The screen includes **Filters**, **Search**, **Export** and an additional chart/graph view toggle for visualising progress. When nothing is scheduled yet, it shows **"No Rows To Show."**



13 FILE MANAGER 4 SECTIONS

Introduction

Store, organize, and manage the yacht's documents in a folder tree — create folders, upload files, rename, move (cut / copy / paste), and view file details.

Where to find it

Open from **Applications** → **File Manager**. The left panel is a folder **tree**; the main area shows the contents of the open folder.

The one rule to remember

Almost everything acts on the **currently open folder** — the one shown in the **breadcrumb** at the top (**/** is the root). **New folder** and **Upload** create items *inside* wherever you are, and the search box only searches *within* that folder. Open the right folder first and most "it went to the wrong place" surprises disappear.

CHECK THE BREADCRUMB

Before creating or uploading, glance at the breadcrumb (e.g. **/ > Drill reports**) to confirm where the new item will land.

FAQs

Q Where do new folders and uploaded files go?

Into the folder that's currently open, shown in the breadcrumb (**/** is the root). If something lands in the wrong place, open the correct folder and create/upload again, or use right-click **Cut** → **Paste** to move it.

Q What does "This folder is empty" mean?

The open folder has no files or subfolders yet. The screen shows a folder icon with **"This folder is empty"** and **"Drag files here to upload."** Populate it with **Upload**, by dragging files on, or with **New folder**.



Folders & Files

The core actions — creating folders, uploading, renaming, moving and inspecting items. Remember that create and upload act on the **currently open folder**.

Create a new folder

1. Go to **Applications → File Manager**.
2. In the tree on the left, click the folder you want the new one to sit inside (or stay at / for the root).
3. Click **New folder** in the toolbar.
4. In the **Folder** dialog, type a name in **Enter your folder name**.
5. Click **CREATE**.

The folder appears immediately in both the tree and the main grid/list, with its **Modified** date set to now.

NEW FOLDER IN THE WRONG PLACE?

It's created inside whichever folder was open — open the correct parent first, or use **Cut/Paste** to move it. If it doesn't show up, click **Refresh**.

Upload files

1. Open the folder you want the files to land in (check the breadcrumb).
2. Click **Upload** in the toolbar and choose files — or drag files directly from your desktop onto the content area.

The files appear in the folder. An empty folder shows **"This folder is empty / Drag files here to upload"** until at least one item exists.

NOTHING HAPPENS AFTER CLICKING UPLOAD?

The file picker opens in a separate window — check it isn't hidden behind the browser. Files always upload into the open folder, so open the right one first.

Rename a folder or file

1. Click the item once to select it (a highlight appears and the toolbar shows **Rename** and **Delete**).
2. Click **Rename** in the toolbar, or right-click the item and choose **Rename**.
3. In the **Rename** dialog, clear the field and type the new name in **Enter your new name**.
4. Click **SAVE**.

The item's name updates in the tree, grid and list.

RENAME FIELD SHOWS "UNDEFINED"?

That happens when Rename is triggered from the empty content area *inside* an open folder instead of from the selected item. Close the dialog, select the folder/file directly in its **parent** listing (toolbar should read "1 item selected"), then rename.

Move items (cut, copy, paste)

1. Right-click the file or folder you want to move.
2. Choose **Cut** (to move) or **Copy** (to duplicate).
3. Open the destination folder.
4. Right-click in the destination and choose **Paste**.

The item appears in the destination; after a **Cut** it's removed from the original location.

View file or folder details

Right-click the item and choose **Details**. The dialog shows **Type** (e.g. Folder), **Size**, **Location** (its path, e.g. /) and **Modified** (date and time). Click **OK** to close.

SIZE SHOWS 0?

The folder is empty or contains only empty subfolders.

FAQs

Q Why is the Paste option greyed out?

Paste only activates after you've used **Cut** or **Copy** on an item. With nothing on the clipboard it stays disabled — cut or copy something first.

Q The name didn't change after Save.

Make sure you selected the item first (the toolbar should read "1 item selected"), then rename and Save again.

Views & Sorting

Switch how the content area looks and the order items appear in.

Large icons vs Details

Toggle the layout from the **View** button (grid icon) at the top right:

- **Large icons** — the default folder-tile grid.
- **Details** — a table with **Name**, **Modified** and **Size** columns, plus a select-all checkbox. Useful when you need dates and sizes, or want to select several items at once.

Sorting

The **Sort by** dropdown has two parts. The first picks the **field: Name, Size or Modified**. The second picks the **order: Ascending, Descending or None**. A checkmark marks the active option in each part (the default is **Name + Ascending**). In **Details** view you can also click a column header (e.g. **Name**) to sort by it.

Navigation & Menus

How the folder tree, breadcrumb, scoped search and right-click menu work together.

The folder tree and breadcrumb

The left panel is a folder **tree**: click a folder name to open it, or click the **chevron** to expand and reveal its subfolders without leaving the current view. Folders can nest several levels deep — for example **Crew Management** expands into Captain, Deckhand, Engineer and Stew.

The **breadcrumb** at the top shows where you are (e.g. / > **Drill reports**); click / to jump back to the root.

Scoped search

SEARCH IS SCOPED TO YOUR FOLDER

The search box only searches the folder you're *in* — its placeholder changes to **Search /Drill reports/**, not the whole drive. Likewise **New folder** and **Upload** act on the open folder, so what you create or upload lands wherever the breadcrumb says you are.

The context (right-click) menu

Right-clicking an item opens a context menu. On a folder or file the full set is **Open, Cut, Copy, Paste, Delete, Rename** and **Details**. **Paste** stays disabled until you've cut or copied something.

Right-clicking a folder also **selects** it, which is why the toolbar simultaneously switches to show **Rename** and **Delete** plus a **"1 item selected"** badge (with an **x** to clear it).

SELECT THE ITEM FIRST

The available options differ slightly between right-clicking an item and an empty area, and renaming from inside an empty open folder can pre-fill the field with **"undefined."** For reliable results, always select the specific item first.



Introduction

The Reports module turns the data already captured across Aquator into clean, shareable documents. Instead of exporting one screen at a time, Reports lets you pull figures from across the platform — accounts, technical/PMS, crew, compliance, charters and more — and produce a single document for owners, accountants, captains and auditors.

Where to find Reports

Reports sits in the left navigation under **Applications**, with its own icon between **File Manager** and **Integrations**. Inside it you'll find two areas covered in this guide: **Standard** and **Application**.

AREA	WHAT IT'S FOR
Standard	Ready-made, pre-built reports you generate with one click and a date range. No setup required.
Application	A build-your-own report tool. Tick the sections you want (pulled from across the platform), name and categorise the report, then save it to reuse later.

Who uses it

- Owners and management who want a single rollup instead of several separate exports.
- Accountants running the monthly close.
- Captains, HR officers and yacht managers preparing crew and flag-state evidence.
- Power users who want to assemble and reuse their own report templates.

Roles & access

Access follows Aquator's **company → fleet → yacht** hierarchy, with per-module **view / edit / delete** rights. What you see in Reports is driven entirely by the permissions your role and plan grant — the menu, the report cards and even individual sections appear only where you have access.

- **See the Reports menu** — any role granted view on Reports for its scope.
- **Generate a Standard report** — you need view on that specific report, and the report's module must be enabled for your account. Each card shows the roles that qualify (e.g. Yacht Manager).
- **Build & save an Application report** — roles with view/edit on the Application area; deleting a saved report needs delete rights.
- **Admin / superadmin** roles have the broadest access.

AVAILABILITY IS DATA-DRIVEN, NOT TIED TO PLAN NAMES

Your plan tier and your role together determine which modules, standard reports and sections are switched on; Aquator simply renders what your permission profile allows. If a report or section doesn't appear, it hasn't been enabled for your account.

FAQs





Q Do I need special access to use Reports?

Yes — the Reports menu, each report card and each Application section only appear where your role has been granted access for your company, fleet or yacht. If you can't see something you expect, ask your administrator to enable it for your role.

Q I see "No report categories are available for your account" — why?

No report areas are enabled for your plan or role. Contact your administrator to have the reports you need switched on.

Standard Reports

Standard Reports are the fastest route to a finished document. Each one is a single PDF that rolls up several underlying reports for a date range you choose.

The available standard reports

REPORT	WHAT IT COVERS
Owner Report	A single-document rollup of Account, Technical, Crew & Compliance information — period spend versus budget, open critical defects, crew certification compliance and certificates expiring. Built for the owner who wants one PDF, not four.
Accounting Report	Accounting, finance, procurement and payroll in one document — P&L summary, budget versus actual, transaction journal, AR/AP ageing, purchase orders, top suppliers and a payroll summary. The source document for your monthly close.
Crew Report	Roster, certifications, hours of rest, leave balances and retention risk in a single document. Supports MLC 2006 evidence, crew planning and flag-state inspections — built for the captain, HR officer and yacht manager.
Compliance Report	An SMS and ISM evidence pack — open SMS items by priority, drill completion by type, vessel certificate expiry status and HoWR captain sign-off rate. The submission-ready evidence document for flag-state and ISM auditors.

To generate a standard report

1. Go to **Reports** → **Standard**.
2. Find the report card you need. Each card shows its format (PDF) and the roles that can use it.
3. Click **Generate** on that card.
4. In the **Select the reporting period** dialog, set the **Date Range**. It defaults to 1 January of the current year through the end of the current month — adjust if you need a different window.
5. Click **Generate Report**. Aquator builds the document for your date range and opens the finished PDF in a new browser tab.

Which cards you see

The cards on the Standard page are filtered to your account:

- A report only appears if its **module is enabled** for your account *and* your role has **view** (or higher) on that report.
- The **Compliance Report** only appears when you are viewing a **specific yacht**. At company or fleet level it is hidden — select a yacht to generate it.

IF A REPORT CAN'T BE BUILT

You'll see a **"Failed to generate report"** message. The most common cause is no data in the selected period — widen the date range or confirm the underlying module has data, then try again.

FAQs



Q Why do I only see three Standard reports when there are four?

The **Compliance Report** only shows when you have a specific yacht selected — at company or fleet level it's hidden. A report can also be hidden if its module isn't enabled for your account or your role doesn't have view on it. Select a yacht, or ask your administrator to enable the report for your role.

Q What date range does a Standard report use by default?

From 1 January of the current year to the end of the current month. You can change it in the date-range dialog before generating.

Q Where does the finished report open?

In a new browser tab. If nothing opens, check that your browser isn't blocking pop-ups for Aquator.

Q Can I report on a single yacht or the whole fleet?

Both. When you generate from a specific yacht, the report is scoped to that yacht; at fleet/company level it aggregates across the yachts you have access to (note the Compliance Report is yacht-level only).

Q What happens with no data, or with a very large fleet?

With no data the report still generates, but the relevant sections come through empty rather than erroring. Large fleets pull more data, so wide date ranges across many yachts take longer to build — narrow the range or scope where you can.

Q How are mixed currencies handled in the Accounting / Owner reports?

Financial figures follow how amounts are recorded in the underlying accounting modules. Where multiple currencies are in play, review the source figures rather than assuming a single converted total.

Application Report

The Application Report lets you assemble a custom document from sections across the whole platform, preview it live, then save it for reuse.

The toolbar

BUTTON	WHAT IT DOES
New	Start a fresh, empty report.
Select	Open the Report Sections picker — choose the date range and tick the sections to include.
Save	Save the current report. You'll be asked for a name and category the first time.
Load	Reopen one of your saved reports, grouped by category.

To build a new report

1. Go to **Reports** → **Application** and click **New**.
2. Click **Select** to open the **Report Sections** picker.
3. Set the **date range** at the top of the picker (it defaults to roughly the last 30 days).
4. Tick the sections you want. Click **Full Report** to include everything available to you, or pick individual sections, then click **Save** in the picker.
5. The report renders in the viewer. Use the toolbar to page through, zoom, switch between single-page and continuous view, search the content, print, or export.

The sections you can include

The picker is built from the modules *you* have access to that contain reportable data, grouped by module — for example **Company** (Profile), **Fleet** (Yachts, AIS Tracker, Calendar, Task Tracker), **SMS** (Editor, Library, Templates, Populated) and **Operations** (To Do, Team, Personal Information, Employment, Payroll, Leave, Emergency Contacts, and more). Your exact list depends on your plan and permissions, so it may be longer or shorter than this.

Sections marked **Coming Soon** can be seen but aren't generatable yet — they're disabled, so tick only the sections without that label for now.

Save, load and delete

- **Save** — Click **Save**, give the report a **Report Name** and optionally assign a **Category**. Names must be unique — you'll see "Report name already exists" if one clashes. The built-in categories are Charter, Equipment, Maintenance, Provisions, Refit and Safety, and you can type your own.
- **Load** — Click **Load** to reopen any saved report. Reports are grouped by category, with uncategorised ones under **Other**. You can also rename a loaded report with the edit icon next to its name.
- **Delete** — In the **Load** list, click the **x** on a saved report and confirm in the prompt. Deletions are permanent, so do these yourself rather than relying on automation.

FAQs



Q Why is a section greyed out or labelled "Coming Soon"?

Those sections are shown so you know they're planned, but they're disabled and can't be generated yet. Tick only the sections without the "Coming Soon" label.

Q What date range does the Application report use by default?

Roughly the last 30 days. Change it in the date-range field at the top of the Report Sections picker before generating. (Standard reports use a different default — 1 January to the end of the current month.)

Q Can I reuse or edit a report I built?

Yes. Click **Save** with a unique name and category, then reopen it any time via **Load**. Open it, change the sections or rename it, and Save again.

Q Who can delete a saved report?

Only roles with delete rights, and deletions are permanent — so delete saved reports yourself rather than relying on automation.

Export & data sources

Reports generate on demand. Standard reports come out as PDF; the Application report viewer can export to several formats.

Formats

- **Standard reports** — open as **PDF**.
- **Application reports** — from the viewer toolbar you can export to **PDF, Excel, HTML or Word**.
- **Other module exports** across the platform — many offer both **PDF and Excel** (for example work-in-progress, inventory-on-hand, inventory movement and the purchase-order import report). Check the export options on the specific report.

How generation works

When you generate a report, Aquator builds it on demand for your chosen date range, saves an export record, then opens the finished file in a new tab. Documents are produced fresh each time — there is no cached copy. Standard reports are built for your browser's current time zone.

REPORTS CARRY YOUR BRANDING

On white-labelled accounts, generated reports use your brand — logo, brand name, colours and footer links — in the header and footer. See **White Labeling** for how that's set up.

Scheduling

NO AUTOMATED RECURRING DELIVERY YET

There is currently no built-in scheduling in the Reports module — reports are generated on demand. If you need a report regularly, generate it manually for each period (for example, monthly for the accounting close).

Data sources

Reports pull live from across Aquator, including:

- **PMS / technical** — work orders, equipment, inventory, logs, purchase orders, audits
- **Refit / yacht production** — planning, BOM, WIP, finance
- **Crew** — qualifications, personal information, employment, payroll, leave, emergency contacts
- **IMO** — crew and passenger lists
- **ISM / SMS** — forms, library, drill matrix, certificate tracking
- **Hours of Work & Rest**
- **Charters** — APA, payment details, guest profiles
- **Accounting** — transactions, budget, category, budget-vs-actual

FAQs



Q Can I schedule reports to run automatically?

Not currently. Reports are generated on demand, so you'll need to regenerate them each period (for example, each month for the accounting close).

Q What formats can I export?

Standard reports open as PDF. The Application report viewer can export to PDF, Excel, HTML or Word. Many other module exports offer PDF and Excel — check the options on the specific report.

Q Will reports show my company branding?

On white-labelled accounts, yes — your logo, brand name, colours and footer links appear in the report header and footer automatically. See the **White Labeling** guide to set this up.

Q Are my generated reports stored?

An export record is kept, but the document itself is built fresh every time you generate — there's no cached file to re-download, so regenerate when you need a current copy.



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SMART DOCUMENTS 4 SECTIONS

Introduction

Build reusable form templates, fill them out to create completed documents, and track every submission through its lifecycle. Smart Documents has three areas: **Editor** (build the form), **Templates** (manage reusable forms), and **Documents** (completed submissions).

Where to find it

Open from **Company** → **Smart Documents**, then pick **Editor**, **Templates** or **Documents** from the **SMART DOCUMENTS** group in the sidebar.

How the three areas fit together

Smart Documents has three stages, and most confusion comes from mixing them up:

- **Editor** — the drag-and-drop form builder. You design the layout: what fields appear and how they validate.
- **Templates** — every saved form as a reusable master. A template on its own is the *blank* form.
- **Documents** — completed submissions. Filling a template and clicking **Submit** turns that copy into a Document.

THE FLOW

Build in **Editor** → save as a **Template** → **Fill Form** on the template → submitted copy lands in **Documents**.

Editing a template changes the blank form going forward — it does **not** change documents already submitted.

FAQs

Q What's the difference between a Template and a Document?

A **Template** is the reusable blank form built in the Editor. A **Document** is one completed, submitted copy of that template. One template can produce many documents.

Q Where do my completed forms go after I submit?

Into **Company** → **Smart Documents** → **Documents**, and into the **Export** → **Filled Documents Report**.



Editor

The Editor is the drag-and-drop form builder. You design the form layout — what fields appear and how they validate — and a saved form becomes a reusable template.

Build a form

BEFORE YOU START

Decide which fields you need. The Editor groups components into **Basic**, **Advanced**, **Layout** and **Data**, so know roughly what you're placing.

1. Go to **Company** → **Smart Documents** → **Editor**.
2. From the left panel, open a category and drag a component onto the **Drag and Drop a form component** canvas.
3. In the component dialog, set the **Label** under the **Display** tab — use the **Preview** pane to confirm how it looks.
4. To make a field mandatory, open the **Validation** tab and tick **Required**. You can also set **Minimum Length**, **Maximum Length**, **Unique** and a custom **Error Label** here.
5. Repeat for each field. Use **Layout** components (Panel, Table, Columns) to group fields.
6. Click **Save** (bottom-right).

The form is saved and appears in the **Templates** list, ready to be filled out.

CHANGES SEEM LOST?

Closing the component dialog with the **x** discards an unsaved new component — set the Label and confirm in Preview before closing. And **Required** lives on the **Validation** tab, not Display.

Field types explained

Components fall into four groups:

GROUP	WHAT IT PROVIDES
Basic	Everyday inputs — Text Field, Text Area, Number, Password, Checkbox, Select Boxes (multi-select), Select / Radio (single-select), Button.
Advanced	Typed inputs that validate their format — Email, Url, Phone Number, Tags, Address, Date / Time, Day, Time, Currency, Survey, and a Signature pad.
Layout	Organise rather than collect — Static Text, Columns, Field Set, Panel (titled section), Table (grid), Tabs, Well.
Data	Repeating or structured entries — Hidden (stored, unseen), Container, Data Map, Data Grid / Edit Grid (multiple rows of the same fields).

THE NON-OBVIOUS ONE

If a form needs an *unknown* number of rows — say a temperature log with several readings — use a **Data Grid / Edit Grid**, not a plain Table. That's what powers an "Add Another" button when filling the form.

Templates

Templates lists every saved form as a reusable blank master. From here you fill a template to create a document, or manage the template itself.

Fill out a template to create a document

BEFORE YOU START

The template must already exist in the Templates list. If it isn't there, build and save it in the **Editor** first.

1. Go to **Company** → **Smart Documents** → **Templates**.
2. Find the template and click the : menu in the **Actions** column.
3. Click **Fill Form** — the **Submit Form** window opens.
4. Complete the fields. Repeating sections have an **Add Another** button; file fields show **Drop files to attach, or browse**; signature fields say **Sign above**.
5. Scroll to the bottom and click **Submit**.

The completed form is saved as a new record in **Documents**, where you can set its Status and Priority; it's also included in the **Filled Documents Report** export.

SUBMIT DOES NOTHING?

A **Required** field is empty or fails validation (e.g. a length rule) — fill the flagged fields and submit again. An **Auto Number** field that's blank and greyed out is expected: it populates automatically on submit.

Manage templates

Click the : menu in the **Actions** column on a template row. Available actions: **View, Edit, Fill Form, Duplicate, Delete, Revision Control, Download, Copy Link**.

- **Edit** — reopens the form in the builder.
- **Duplicate** — creates a copy to modify without changing the original.
- **Download** — saves a file copy; **Copy Link** copies a direct link.

EDITING ONLY AFFECTS NEW SUBMISSIONS

Edits update the blank template for all future submissions but do **not** change documents already submitted from it. **Delete** permanently removes the template, and **Share** changes who can access it — perform deletions and permission changes deliberately.

FAQs

Q Why is the Auto Number field empty when I fill a form?

Auto Number fields are read-only and fill in automatically when you click **Submit**, so they appear blank (and greyed out) while you complete the form.



Q How do I add multiple rows to a section (like a log)?

Use the **Add Another** button beneath a repeating section while filling the form. (In the Editor, that comes from a **Data Grid / Edit Grid** component.)

Documents

Documents holds every completed submission. Find and filter them, switch views, and track each one with a Status and Priority.

Find, filter and view documents

1. Go to **Company** → **Smart Documents** → **Documents**.
2. Switch views with the three icons next to the search box: **list/table**, **board**, and **calendar** (Day / Week / WorkWeek / Month / Year / Agenda).
3. Click **Filters** to filter by **Users**, **Category**, **Created At**, **Updated At**, **Status** or **Priority**; use **Clear All** to reset.
4. Type in **Search** to find by document text.
5. Set a row's **Priority** or **Status** directly from its dropdown in the list.
6. To export, click **Export** → **Filled Documents Report** and choose the format.

BOARD/CALENDAR SHOWS "NO DATA AVAILABLE"?

No documents match the current filter or date range — clear filters or change the calendar period.

Document statuses

A document's **Status** tracks where it is in its lifecycle. Change it from the Status dropdown directly in the list — no need to open the document — and filter by status to see, e.g., everything awaiting approval.

STATUS	MEANING
OPEN	Where new submissions typically start.
IN PROGRESS	Active work.
ON HOLD	Paused.
DONE	Completed.
APPROVED	Review decision — accepted.
REJECTED	Review decision — not accepted.
ARCHIVED	Removed from day-to-day views without deleting.

Document priority

Priority flags urgency, separate from status: **None**, **Low**, **Medium**, **High**. Set it from the Priority dropdown in the list, then use **Filters** → **Priority** to focus on the most urgent items. Priority is informational — it doesn't change a document's workflow stage, which is governed by Status.

FAQs



Q Can I edit a document after it's been submitted?

Submitted documents offer **View, Download, Copy Link, Delete** and **Revision Control** from the **:** menu — there's no direct "Edit/Fill Form." To capture corrections, use **Revision Control** for a tracked version, or submit a fresh document from the template. Editing the template won't alter an already-submitted document.

Introduction

Yacht Management covers two things: managing the **yachts in your fleet** (the company-level Yachts list) and the **day-to-day collaboration tools inside each yacht** — Chat, Calendar, To Do and Task Tracker.

Two places, two jobs

- **Fleet (Yachts list)** — add, edit, view and remove the vessels in your fleet, with each yacht's profile and regional settings. Found at **Home > Company > Yachts** (the **Yachts** item in the left navigation rail).
- **In-yacht tools** — once you **View** (enter) a yacht, open **Applications > Yacht Management** in the sidebar for **Chat, Calendar, To Do** and **Task Tracker**.

FLEET LIST VS A SINGLE YACHT

The **Yachts** list is the company-wide fleet view. To work *inside* a yacht, open its : → **View** — that switches you into the selected yacht's workspace.

The collaboration tools

Inside a yacht these four are complementary:

- **Chat** — real-time messaging with crew and contacts.
- **Calendar** — schedule events (one-off or recurring).
- **To Do** — a personal checklist for quick reminders.
- **Task Tracker** — formal, assignable work with due dates, departments, sub-tasks and a review status workflow.

FAQs

Q What's the difference between Chat, To Do and Task Tracker?

Chat is real-time messaging with crew and contacts. **To Do** is a personal checklist for quick reminders. **Task Tracker** is for formal, assignable tasks with due dates, departments, sub-tasks, attachments and a review status workflow. **Calendar** rounds it out for scheduling.

Q When should I use To Do vs Task Tracker?

To Do is for quick, personal items (title, description, priority, checkbox). **Task Tracker** is for trackable, shareable work (auto ID, Due Date, Assign To User, Department, Sub Tasks, attachments, full status workflow). To Do is for yourself; Task Tracker is for assigning and tracking work across the yacht.

Fleet (Yachts)

The Yachts list is your company-wide fleet view — add, edit, view and remove vessels, each with its profile details and regional settings. Open it from **Yachts** in the left navigation rail (**Home > Company > Yachts**).

Add a new yacht

BEFORE YOU START

Have the yacht's basic particulars ready (builder, model, length, GT, year, flag) — but everything can be edited later, so you don't need it all up front.

1. Go to **Yachts** and click **Add** (top right).
2. In the **Add Yacht** window, fill in: **Yacht Name**, **Account Name**, **Yacht Builder**, **Yacht Model**, **Length**, **GT**, **Year**, **Flag**.
3. Set **Date Format** (DD MMM YYYY, DD/MM/YYYY, MM/DD/YYYY or YYYY/MM/DD) and **Currency** (the yacht's operating currency).
4. Add **Employer Name** and **Employer Address**.
5. (Optional) Use the camera icon for a cover image and **Profile Picture** for the avatar.
6. Click **Save**.

The window closes and the yacht appears as a row in the Yachts list (name, account, builder, model, length, GT, year, flag).

WINDOW CLOSED BUT NO YACHT APPEARED?

The record didn't save — re-open **Add** and make sure at least **Yacht Name** and **Account Name** are completed before Save. "No Rows To Show" means no yachts exist yet, or a Search/Filter is hiding them — clear them.

Edit a yacht's details

1. On the yacht's row, click the actions menu (:) in the **Action** column.
2. Click **Edit**.
3. Update any field — the form matches Add Yacht and is pre-filled with current values.
4. Click **Save**.

The list reflects your changes immediately.

CHANGES DIDN'T APPEAR?

Confirm you clicked **Save** (not Cancel or ✕) on the right yacht. If **Currency** shows "Select..." on an existing yacht, it was never set — choose one and Save.

View vs Edit vs Delete

Each row's : menu has three actions that do very different things:



ACTION	WHAT IT DOES
View	Opens that yacht's full workspace/dashboard — you leave the fleet list and switch into the yacht to work in its modules.
Edit	Opens the Edit Yacht form in a pop-up to change profile details without leaving the list.
Delete	Permanently removes the yacht and its related data, after a confirmation prompt.

THE "+" EXPANDER

The + at the start of each row isn't View or Edit — it expands an inline status panel summarising that yacht's Payslips, Crew Leave, YM/PMS/Refit tasks, Board (In/Out), HOWR, SMS, Certificates and Drills at a glance.

Date Format & Currency

These are **per-yacht** regional settings, so different yachts in the same fleet can differ:

- **Date Format** — how dates display for the yacht (DD MMM YYYY, DD/MM/YYYY, MM/DD/YYYY, YYYY/MM/DD).
- **Currency** — the yacht's operating currency, from the currency list (e.g. AUD, BRL...).

They're independent — set both — and can be changed any time via **Edit**.

FAQs

Q Can I delete a yacht, and what happens to its data?

Yes — : → **Delete**, then confirm. This is a **cascading, permanent** action: it removes the yacht's associated records, not just the list entry. If you only need to fix details, use **Edit**. Nothing is removed until you confirm with **Delete**.



Chat

Chat is real-time messaging with the crew and contacts on a yacht. Open it inside a yacht at **Yacht Management > Chat**.

Send a message

BEFORE YOU START

You must be inside a yacht. The person you want needs to appear under **Contacts** (e.g. crew members, Aquator SMS).

1. Go to **Yacht Management > Chat**.
2. Pick who to message: click an existing thread under **Chats**, or a name under **Contacts** to start a new one. You can also use **Search or start a new chat** at the top.
3. Type in the **Type your message...** box at the bottom.
4. Click **Send**.

Your message appears in the thread on the right, grouped by date with a timestamp, and the thread moves into your **Chats** list for quick access.

RIGHT PANE ONLY SHOWS "START CONVERSATION"?

No thread is selected — click a contact or existing chat first. If you can't find a person, they may not be a contact on this yacht; use the search box.

Calendar

The Calendar schedules events inside a yacht — one-off or recurring — with colour coding and multiple views.

Add an event

1. Go to **Yacht Management > Calendar**.
2. Click **New Event** (or **New Recurring Event** for something that repeats).
3. Fill in the event window: **Event Color, Title, Location, Start** and **End** (each with date + time pickers), **Assign To, All day** and/or **Timezone, Repeat** (default Never) and **Description**.
4. Click **Save**.

The event appears on the grid in the chosen colour. Use the view toggles (Day, Week, WorkWeek, Month, Year, Agenda, Timeline Views, Grid) and **Today** / the date navigator to find it. **Print** or **Export** from the toolbar.

EVENT ON THE WRONG DAY/TIME?

Check the **Start/End** pickers and the **Timezone** checkbox — the header clock shows current UTC for reference. To repeat an event, use **Repeat** in the form or start from **New Recurring Event**.

Edit an event

1. Locate the event (switch views or use the date navigator if needed) and click it to open.
2. Update any field — Title, Location, Start, End, Assign To, Repeat, Description, etc.
3. Click **Save**.

The calendar updates immediately. If you can't find an event, switch to **Month** or **Agenda** view, or use **Today** and the date arrows.

To Do

To Do is a lightweight personal checklist inside a yacht. For assignable, tracked work, use **Task Tracker** instead.

Add a To Do task

1. Go to **Yacht Management > To Do** and click **Add**.
2. In **Add Task**, set the priority (**High, Medium** or **Low** — defaults to Low) and add a **Title** and **Description**. The icon row also lets you set a date and label.
3. Click **Add Task**.

The task appears in the list. Tick its checkbox to mark it complete — completed items show with a strikethrough; un-tick to undo.

CAN'T FIND A TASK?

Use **Search tasks...** or check **Filters** at the top.

FAQs

Q When should I use To Do vs Task Tracker?

Use **To Do** for quick, personal checklist items. Use **Task Tracker** for trackable, shareable work with an auto ID, Due Date, Assign To User, Department, Sub Tasks, attachments and a full status workflow. To Do is for yourself; Task Tracker is for assigning and tracking work across the yacht.

Task Tracker

Task Tracker handles formal, assignable work inside a yacht — with due dates, departments, sub-tasks, attachments and a review status workflow.

Create a task

BEFORE YOU START

To assign the task, the person should appear in **Assign To User** and the relevant **Department** should exist.

1. Go to **Yacht Management > Task Tracker** and click **Add**.
2. Enter a **Title** and, optionally, **Sub Tasks** via **+ Add Sub Task**.
3. Set **Due Date** (date + time), **Assign To User**, **Priority** (None, Low, Medium, High — defaults to None) and **Department**.
4. Add a **Description** and any **Images / Files** (PNG, JPG, PDF, DOC, XLS; max 100 MB).
5. Click **Save**.

The task appears as a row (Title, ID, Due Date, Assign To User, Priority, Status, Department, Actions) with Status **OPEN** and an auto-assigned ID.

NO STATUS FIELD IN THE ADD FORM?

That's expected — new tasks start as **Open**; you set status afterward from the list. If a department/assignee is missing from the dropdown, it hasn't been set up for this yacht yet.

Update status or priority

1. Find the task's row (scroll the table sideways to reach the **Priority** and **Status** columns if needed).
2. Click the **Status** cell and choose a value (Open, On Hold, In Progress, Done, Approved, Rejected), or click the **Priority** cell to change it inline.

The change saves on selection and the row's badge updates immediately. If you don't see a dropdown, click directly on the Status value/chevron in that row.

How statuses work

Each task carries a **Status** reflecting where it sits in its lifecycle. Status is set from the row, not the Add form — new tasks always begin as **Open**.



STATUS	MEANING
OPEN	Newly created, not yet started (the default).
ON HOLD	Paused — work intentionally stopped for now.
IN PROGRESS	Actively being worked on.
DONE	Finished and ready for review.
APPROVED	Reviewed and signed off (terminal "accepted").
REJECTED	Reviewed and not accepted (terminal "declined").

DONE VS APPROVED/REJECTED

The split after Done is what lets the tracker double as a review/sign-off workflow: **Done** signals ready for review, while **Approved / Rejected** record the review outcome.

Introduction

Live vessel tracking and fleet operations — track yacht positions on a map, view AIS telemetry, manage per-yacht records, and coordinate work through chat, calendar and tasks.

READ FIRST: "LOCATION PERMISSION REQUIRED"

If you see a red **"Location permission required"** toast (bottom-right), the Fleet/Hybrid tables show **"No Rows To Show"**, the Yacht selector shows **"No options,"** and markers may not plot. This is your **browser blocking location access**, not missing data. Click the site-permissions icon in your browser's address bar, set location to **Allow** for this site, and reload — the vessel list and markers then populate.

Where to find it

Open **AIS Tracker** from the left sidebar. Sub-pages: **Map, Hybrid, Fleet, Yacht, Chat, Calendar** and **Task Tracker**.

Map vs Hybrid vs Fleet vs Yacht

The tracking views show the same fleet data in different shapes:

- **Map** — geographic only; best for where vessels are, plus historical tracks, pins and zones.
- **Fleet** — tabular only; best for sorting/filtering by telemetry (speed, ETA, length) and paging many vessels.
- **Hybrid** — both stacked: map on top, the same vessel table below, to cross-reference a row with its position.
- **Yacht** — a deep dive into *one* vessel's full profile, rather than a fleet overview.

FAQs

Q What does "No options" in the Yacht selector mean?

No vessels have loaded — almost always a missing browser **location permission**. Grant it and reload.

Q Why are the calendar times not my local time?

The Calendar runs in **UTC** (shown in the header bar).

Q Can I track only certain vessels on the map?

Yes — use the **Filter** panel (Yachts, Length, Flag, Class, Status, Category).

Q Where do historical tracks come from?

Per-vessel AIS history over the date range you set in the **Historical Track** panel, plotted after you click **Refresh View**.

Map

The Map plots vessels geographically, with map styles, historical tracks, saved pins and zones. Grant browser **location permission** first or it won't plot vessels.

Track vessels on the map

1. Go to **AIS Tracker → Map** — it opens in **Satellite** style, centred on your fleet's region.
2. Use **Zoom in / Zoom out** (top-right) or scroll to navigate; **Fullscreen** (expand-arrows) to enlarge.
3. Click the **Filter** icon (top of the left toolbar) to filter by **Yachts, Length, Flag, Class, Status** or **Category**.
4. Use the **Search** box (top-right magnifier) to jump to a location or vessel.

Matching vessels appear as markers. The cursor coordinates show in the lower-right; scale is shown bottom-right (e.g. 100 km).

NO MARKERS / "LOCATION NOT AVAILABLE"?

Grant browser location permission and reload. If the map looks cluttered, use **Filters** to limit by status or category.

Change the map style

Click the **Layers** icon (stacked squares, right toolbar) and choose from **Street, Street (No Labels), Light, Light (No Labels), Dark, Dark (No Labels), Satellite, Satellite (No Labels)**. The basemap switches immediately; the "No Labels" variants hide place names for a cleaner view.

View a vessel's historical track

PER-VESSEL, NOT FLEET-WIDE

You must select a specific yacht — historical track is per-vessel.

1. Click the **Historical** icon (third icon down on the left toolbar — a circle with side lines).
2. Choose a vessel from the **Yacht** dropdown.
3. Set the **Date Range** (defaults to the last 7 days).
4. Click **Refresh View**.

The vessel's recorded path for that range plots on the map. If no track appears, the vessel may have no AIS records in that window — widen the date range.

Pins and Zones

Pins — click the **Pin** icon (map-pin, left toolbar). Use **Search Pin** or review the **Available Pin** list (name + date); click the trash icon to remove one.

Zones — click the **Zone** icon (map icon, left toolbar). Use **Search Zones** or pick from **Available Zones** (e.g. Gibraltar, Monaco, Malta, Palma — each with a colour and date); click the trash icon to remove one. Zones render as coloured polygons over the relevant sea areas.



NO UNDO

Deleting a pin or zone is immediate — there's no undo prompt, so confirm before clicking the trash icon.

Fleet & Hybrid

Fleet is the tabular view of vessels with live AIS telemetry; Hybrid stacks the map and the same table together. Grant **location permission** or the table shows "No Rows To Show."

Read the fleet vessel table

1. Go to **AIS Tracker → Fleet**.
2. Review vessels across the columns: **Name, Pin, Destination, ETA, Speed, Course, Latitude, Longitude, Length** (scroll right for more).
3. Use **Filters** (top-left) to narrow, **Search** to find a vessel, and the page-size selector (default 10) plus pagination to page through results.
4. Use the two layout icons beside the search box to switch between table-only and split layouts.

The filtered, paged vessel list displays with live AIS telemetry per row.

Use the Hybrid (map + list) view

Go to **AIS Tracker → Hybrid**. The map (with the full left/right toolbar) sits on top; the vessel table (same columns as Fleet) sits below. Filter, search and page the table while keeping the map in view — so you can scan the list and see positions at the same time.



Yacht

The Yacht view is a deep dive into one vessel's full profile — live AIS telemetry plus stored records. Select a vessel first; the page is blank until one is chosen.

View a single yacht's profile

1. Go to **AIS Tracker** → **Yacht**.
2. Choose a vessel from the **Select...** dropdown at the top.
3. Review the cards: **AIS Data** (Destination, ETA, Calculated ETA, Speed, Course, Lat/Long, Length, Width, Draught, Flag, Classification Society, IMO, MMSI, Callsign, AIS Class, AIS Status, Signal Age), **Yacht Information, Daily Logs** (Water Maker/Generator Hours, Charter details, Warranty, Last Contact, Next Planned Item), **Custom Data, Address, Social Links, Gallery** and **Documents**.

Cards with a **pencil** icon (e.g. Yacht Information, Custom Data, Address, Social Links) can be edited.

EMPTY STATES

"No options" in the dropdown → grant location permission and reload. "No Yacht Images / Documents" are empty states — add files via the relevant card. Coordinates showing "NaN° NaN' NaN" mean no AIS fix is available yet.

How vessel positions and AIS data work

The AIS Tracker plots vessels from **AIS** (Automatic Identification System) telemetry. Each vessel exposes a standard set of fields: identity (**MMSI, IMO, Callsign, Flag, Classification Society**), navigation (**Speed, Course, Latitude, Longitude, Destination, ETA, Calculated ETA**) and physical data (**Length, Width, Draught**).

Two fields explain most "why does this look stale/odd?" questions:

- **Signal Age** — how long ago the last AIS fix was received; older signals mean the position is less current.
- **AIS Status / AIS Class** — the transponder's reported state and class.

GOOD TO KNOW

When no fix exists yet, coordinates render as "NaN° NaN' NaN" — an absent signal, not a bug. **Calculated ETA** is derived from current speed and course toward the destination, so it can differ from a manually entered ETA.

Chat, Calendar & Tasks

Beyond tracking, AIS Tracker includes collaboration tools: Chat for messaging, Calendar for scheduling, and Task Tracker for assignable work.

Start a chat

Go to **AIS Tracker → Chat**. Use **Search or start a new chat**, pick a contact, or click **Start Conversation**. Existing threads appear under **Chats**; people appear under **Contacts**. Empty states read **"No Chats Found."**

Manage events in the Calendar

1. Go to **AIS Tracker → Calendar** (times shown in **UTC**).
2. Pick a view: Day, Week, WorkWeek, Month, Year, Agenda, Timeline Views or Grid.
3. Click **New Event** or **New Recurring Event** to add entries; use the date arrows or **Today** to navigate.
4. Use **Print** or **Export** to output the schedule; adjust display via **Settings**.

Create a task in Task Tracker

1. Go to **AIS Tracker → Task Tracker** and click **Add** (top-right).
2. Complete the form: **Title**, optional **ID**, **Sub Tasks** (via + Add Sub Task), **Due Date** (date + time), **Assign To User**, **Priority** (None / Low / Medium / High), **Department**, **Assign To Yacht**, **Description** and **Images / Files**.
3. Click **Save**.

The task appears with columns **Title**, **ID**, **Assign To Yacht**, **Due Date**, **Assign To User** and a colour-coded **Priority** badge.

TIPS

Use **Filters** (shows an active-filter count) plus **Save View** to keep a filtered set; **Clear All** resets. Switch between table, split and calendar layouts using the icons left of the search box. **Export** downloads the task list; **Events** shows task events.

Introduction

The Settings tab — the **Global Settings** area inside the Admin Console — is the central configuration hub for the whole Aquator platform. It's a single grid of cards, where each card is one configurable area.

Where to find it

Open **Admin Console** → **Settings**. At the top of the grid are a **Search settings...** box and a module filter dropdown (**Select...**) — jump to a setting by name, or narrow the grid to one module's settings.

Settings aren't siloed

THE KEY CONCEPT

Each card is **tagged with the product module(s) it feeds**, so one setting often powers several modules at once (cards are tagged against Accounting, Charter, Planned Maintenance, New Builds, Refits, Crew, AIS Tracker, Shipyard ERP and more). The tags double as a map of *which configuration affects which part of the product* — useful when chasing a "why isn't X working?" question.

What it's for

Settings is where an administrator does the one-time and ongoing groundwork that makes the rest of the platform function. It:

- establishes the **financial backbone** (accounts, chart of accounts, currencies, taxes, customers, suppliers, items) every invoice, PO and report draws on;
- defines the **shared reference data** (categories, addresses, participants) that tasks and records across modules rely on;
- sets **crew rules** (leave types); and
- configures how the **fleet and shipyard** modules behave and display (map markers, work centers, production stages).

FAQs

Q How do I find a specific setting?

Use the **Search settings...** box to find a card by name, or the module **Select...** dropdown to show only the settings that feed a given module.

Q Why does a setting affect more than one module?

Settings are shared, not siloed — each card is tagged to the module(s) it powers, so one setting (e.g. Categories or Currencies) can feed several modules at once.

What's inside

The grid's cards group into a few clusters by what they power. Here's the catalogue.

Accounting & Finance

The largest cluster — the financial backbone:

CARD	WHAT IT CONFIGURES
Accounts	Bank / cash / card accounts with balances and an active toggle.
Chart of Accounts	The full accounting structure.
Currencies	Multi-currency with a primary currency and an FX rate mode.
Taxes	Tax rates with types.
Customers	Income / invoicing contacts.
Suppliers	Procurement contacts.
Items	Products / services used as invoice and PO line items.
Default	Default accounting preferences.
Finance Approvals	Transaction approval workflows.
Company	Core company details.
Consign	Consignment contacts for POs.
Central Agent	Assigned charter agent.
Addresses	PO billing / shipping details.

Operations & assets

- **Categories** — tags to sort/filter tasks and items, shared across New Builds, Planned Maintenance and more.
- **Participants** — external people assignable to tasks in New Builds / Refits.
- **Storage.**

Crew

- **Leave Settings** — the leave types and rules for crew.

AIS Tracker

- **Fleet Settings, Map Pin** and **Fullscreen View** — controlling how vessels and locations display on the live tracking map.

Shipyard ERP

- **Projects, Work Center** and **Stages** — the production setup for the shipyard workflow.

The UI patterns

Rather than every page being unique, Settings reuses a handful of UI archetypes — learn one and you know them all.

The list / table archetype

The most common pattern (Taxes, Chart of Accounts, Currencies, Customers, Items, Work Center, Stages). It has a header with a **Search** box and an **Add** button, a table of records, a per-page count selector (default 10) with pagination, and a three-dot **Actions** menu per row.

1. Click **Add** to create a record, or the row's : menu for **View, Edit** or **Delete**.
2. Fill in the form (for Categories, for example: Parent, Name, Icon, Color, Description) and save.
3. Many rows also have an **Enabled** toggle to switch a record on/off without opening it.

A brand-new list shows **"No Rows To Show"** until you add the first record.

The card-tile archetype

Used by **Accounts** and **Leave Settings**. **Accounts** shows each account as a visual card with balances and inline edit / delete / toggle icons. **Leave Settings** shows each leave type as a card with a single on/off toggle and one bottom **Save** button — a toggle-and-save screen rather than per-record CRUD.

The map-data grid archetype

Used by AIS Tracker's **Fleet Settings** and **Map Pin**. These add an **Active View** filter bar with **Save View** and **Clear All** — build and save custom filtered views over vessel or pin data — plus a **marker-colour** column that controls how things appear on the tracking map.

Settings logic to know

A few things the Settings UI doesn't explain on its own — worth knowing before they trip you up.

Module-nested settings only load from their card

OPEN THEM FROM THE GRID, NOT BY URL

The module-nested settings (AIS Tracker's **Fleet Settings / Map Pin**, Shipyard ERP's **Work Center / Stages**) only load when opened through their **card on the grid** — their breadcrumb runs **Settings > [Module] > [Setting]**. Reaching them by direct URL may not load them.

Settings that carry hidden logic

SETTING	THE NON-OBVIOUS RULE
Taxes	A tax's Type — Fixed, Inclusive or Withholding — changes how the number is applied, not just its value.
Currencies	You need at least two currencies before you can set FX rates, and there's a Manual vs automatic FX mode.
Leave Settings	Leave types are Accruable vs Non-accrued , which determines whether a balance builds up.
Stages	A parent/child hierarchy (e.g. "1. Hull & Structure" → "1.1 Lamination Bay"), with each stage typed as Inventory / BOM .

Empty states

Empty states are consistent — brand-new lists show **"No Rows To Show."** Currencies even gives a helpful hint: **"Add at least two currencies to configure exchange rates."**



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YACHT SETTINGS 6 SECTIONS

Introduction

Configure your vessel's profile, specifications, amenities, contacts, insurance, addresses, and crew certificate requirements. Reached via **Admin Console** → **Yacht** → **Yacht Settings**, organised into seven tabs.

The seven tabs

Each tab owns a different part of your vessel record:

TAB	WHAT IT HOLDS
General	Branding (cover, logo), core identity (name, account, date format), profile tags & description, and the legal employer details used in crew contracts.
Specifications	The technical spec sheet: identity, dimensions, accommodation, performance, engines, compliance/class, tank capacities and design credits.
Amenities	Categorised amenity lists used in charters and listings.
Contact	A directory of management/agent contacts.
Insurance	Policy details, coverage values and the policy document.
Address	Marina and registration addresses, each with a map.
Safe Manning	The certificate requirements expected for each crew role.

EACH TAB SAVES ON ITS OWN

Most tabs save independently with their own **Save** and **Reset** buttons — changes on one tab don't carry to another until saved. Save the tab you're working on before switching.

FAQs

Q Can I undo changes before saving?

Yes — most tabs have a **Reset** button that discards unsaved edits and restores the last saved values.

Q What file types and sizes are allowed for uploads?

Branding images (cover/logo): **JPG, GIF, PNG, max 2 MB**. Insurance policy documents: **PNG, JPG, PDF, DOC, XLS, max 100 MB**.





Q Does each tab save separately?

Yes — each tab has its own Save/Reset, so save the tab you're working on before switching.

General

The General tab sets your yacht's branding, identity, profile description and the legal employer details used in crew contracts.

Set up branding and profile

BEFORE YOU START

Cover image and logo files must be **JPG, GIF or PNG, max 2 MB**.

1. Go to **Admin Console → Yacht → Yacht Settings → General**.
2. Under **Yacht Branding**, use **Upload Cover** and the logo **Upload** control (use **Remove** to clear either).
3. Under **Yacht Identity**, set **Yacht Name**, **Account Name** and **Date Format**.
4. Under **About Your Yacht**, add **Tags** and write the rich-text **About** description shown on your profile.
5. Under **Employer Details**, complete **Employer Name**, **Employer Address**, **Care of (c/o)** and **Yacht**.
6. Click **Save**.

WHY EMPLOYER DETAILS MATTER

The Employer Details feed **crew contracts and HR documents**, so keep them accurate. If an image won't upload, check it's under 2 MB and in JPG/GIF/PNG format.

Specifications

The Specifications tab is your vessel's technical spec sheet — identity, dimensions, accommodation, performance, engines, compliance, capacities and design credits.

Edit your specifications

1. Go to **Admin Console** → **Yacht** → **Yacht Settings** → **Specifications**.
2. Fill in the relevant section — see the list below.
3. Click **Save** (or **Reset** to discard unsaved edits and restore the last saved values).

SECTION	FIELDS
Header	Vessel Name, Builder, Model.
Commercial & Identity	Built, Flag, Flag Registration Number, Call Sign, MMSI, Asking Price, Current Location.
Dimensions & Capacity	Length Overall, Beam, Draft (m); Gross Tonnage (GT).
Accommodation	Cabins, Guests, Crew.
Performance	Cruising Speed, Maximum Speed (kts), Range.
Technical Summary	Main Engines, Propulsion, Bow Thruster, Stabilizers, Generators.
Compliance & Class	IMO Number, Classification, MCA Compliance, ISM Certified.
Capacities	Fresh Water, Fuel, Black Water, Grey Water (L).
Design & Construction	Exterior Designer, Interior Designer, Construction, Hull Configuration.

CHECK THE UNITS

Each measurement field (m, L, kts) has its own unit selector next to it — confirm the unit dropdown before saving.

Amenities, Contacts & Addresses

Three tabs hold your yacht's listing and directory information: amenities for charters/listings, a contacts directory, and the marina & registration addresses.

Amenities

1. Go to **Yacht Settings** → **Amenities** and click **Add New Category**.
2. Enter a **Category** title.
3. Type an amenity in **Add item...** and click **+** to add it; repeat for each item.
4. Click **Save**.

The category and items become available for charters and listings. A blank tab with only an **Add New Category** button is the empty state — create the first category to populate it.

Contacts

1. Go to **Yacht Settings** → **Contact** and click **Add**.
2. Complete the **Contact Details** form: photo, Role, Company Name, First Name, Last Name, Email, Phone (with country code), Address Line 1/2, City, Post Code, Country and Note.
3. Click **Add** to save the contact.

The contact appears in the table. Use **Search** to filter, the page-size selector and arrows to page, and **Download** to export the list.

Addresses

1. Go to **Yacht Settings** → **Address**.
2. Under **Marina**, start typing in **Address Line 1** — selecting a suggestion auto-fills the other fields. Then adjust Address Line 2, Post Code, City, Country, Email, Website and Phone. A map pin reflects the location.
3. Repeat under **Registration**, including the **Registration Name** field.
4. Click **Save**.

MAP PIN IN THE WRONG PLACE?

Re-select **Address Line 1** from the autocomplete — manual typing alone may not move the pin. The hint "Selecting fills other fields" marks the autocomplete field.



Insurance

The Insurance tab records the policy, coverage values and the policy document for the vessel.

Record insurance and upload the policy

1. Go to **Admin Console** → **Yacht** → **Yacht Settings** → **Insurance**.
2. Under **Insurance**, enter **Insurance Company**, **Insurance Policy** and the **Policy period (From) / (To)**.
3. Under **Policy Document**, drag & drop or browse to attach the policy file.
4. Complete **Collision Damage** (Salvage, Property Damage, Injury, Personal Property, Specialized, Consequential Damage, Additional Circumstances, Cruising, Other), **Coverage Value** (Agreed Value, Actual Cash Value) and **Miscellaneous** (Other, Comments).
5. Click **Save**.

"POLICY EXPIRED" RED BANNER?

The policy's **Policy period (To)** date is in the past (the banner shows how many days ago). Renew with your insurer and update the policy dates to clear it. If the document won't attach, accepted types are **PNG, JPG, PDF, DOC, XLS, max 100 MB**.



Safe Manning

Safe Manning sets the certificate requirements expected for each crew role — the baseline against which crew certificate coverage is judged.

Set crew certificate requirements

BEFORE YOU START

The Safe Manning table is populated from the **Settings** modal — if the table is empty, add roles there first.

1. Go to **Admin Console** → **Yacht** → **Yacht Settings** → **Safe Manning**.
2. Click **Settings** to open **Role Certificate Settings**.
3. Click **Add Role** and choose a **Role** (e.g. Captain, Chief Engineer, Fleet Captain).
4. In **Required Certificates**, select all mandatory certificates (e.g. STCW 95, ENG 1, MCA CoC Master). In **Optional Certificates**, add any non-mandatory ones.
5. Repeat per role, then click **Save** (or **Cancel** to discard).

Each configured role appears on the Safe Manning tab with its Required and Optional certificates listed. An empty Role / Required / Optional table means no roles are configured yet — click **Settings** → **Add Role**.

Required vs Optional certificates

Each role carries two certificate lists:

- **Required Certificates** — the qualifications a crew member in that role *must* hold; these drive the role's compliance expectations.
- **Optional Certificates** — desirable-but-not-mandatory qualifications recorded for completeness (e.g. specialised endorsements).

Both lists are multi-select, so one role can require several certificates at once (a Captain may require STCW 95, ENG 1 and an MCA CoC Master while listing other endorsements as optional). Configuring these per role is what populates the Safe Manning table.



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PERSONAL SETTINGS 7 SECTIONS

Introduction

Your personal profile area in Aquator Marine — manage your account identity, security, personal and contact details, employment (SEA) records, certificates, leave, and files. Reached via **Admin Console** → **Personal** → **Personal Settings**, then the horizontal tab bar.

The tab bar

Left to right: **Account** · **Change Password** · **Personal Information** · **Address** · **Employment** · **Certificates** · **Leave** · **Emergency Contact** · **File Manager** · **Social Links**. The bar scrolls horizontally — use the < > arrows at either end if a tab is off-screen.

SUBCOLLECTION: SEA (UNDER EMPLOYMENT)

The **Employment** tab nests its own sub-tabs: **SEA**, **Leave Details**, **Bank Details** and **Payslip**. That's where contracts, salary and pay live — see **Employment & SEA** and **Leave**.

The non-obvious bits worth reading first

A few things the UI never explains cause most questions:

- **Salary calculation** — why a payslip total differs from the headline salary (see **Employment & SEA**).
- **Leave types** — why your balance sometimes doesn't drop after a leave is approved (see **Leave**).
- **"No active contract"** — why a payslip can't generate (see **Employment & SEA**).

FAQs

Q Why can't I edit my email or company on the Account tab?

The **Email** and **Yacht / Company** fields show a lock icon and are read-only — they're managed at the company/administrator level. Contact your administrator to change them.

Q Do tabs save independently?

Most tabs have their own **Save** and **Reset** — save the tab you're working on before switching.



Account & Security

The Account and Change Password tabs hold your identity, profile branding, two-factor authentication and password.

Profile picture & cover image

BEFORE YOU START

Have an image ready in **JPG, GIF or PNG, max 2 MB**.

1. On the **Account** tab, find **Profile Branding**.
2. Click **Upload Cover** for the banner, or **Upload** (under Profile Picture) for your avatar.
3. Select your image — it previews immediately. Use **Remove** to clear an existing image.

Account identity

1. In **Account Identity**, edit **Username, First Name** and **Last Name**.
2. Click **Save** (or **Reset** to discard).

LOCKED FIELDS

Email and **Yacht / Company** show a lock icon and are read-only — they're managed at the company/admin level. Contact your administrator to change them.

Two-factor authentication (2FA)

On the **Account** tab, scroll to **Two-Factor Authentication** and toggle on **Email verification** ("Enable to require a verification code on each login"). At each future login you'll enter a code sent to your account email — so make sure your email is correct first.

Change your password

1. Open the **Change Password** tab.
2. Enter your **Old Password**, then your **New Password** and **Confirm Password** (use the eye icon to show/hide).
3. Click **Save**.

Your password updates immediately. If you see "passwords don't match," the New and Confirm fields must be identical.

Personal Information

The Personal Information tab holds your basic details plus passport, visa and seaman's book records.

Complete your personal information

1. Open the **Personal Information** tab.
2. Fill in: **ID, Birth Date, Birth Place, Languages** (add multiple as tags), **Phone Number** (with country-code selector), **Nationality, Rank** (dropdown), **Gender** (Male / Female / Others) and **Bio**.
3. Click **Save** (or **Reset** to revert).

Your details feed other areas of the platform (e.g. crew records).

Passport, visa & seaman's book

Scroll below the basic details:

- **Passport Details** — complete the Primary Passport (Passport Number, Country of Passport, Expiry Date). Click **Add Passport Details** for an additional passport.
- **Visa Details** — complete the Primary Visa (Issuing Country, Name of Visa, Issue Date, Expiry Date). Click **Add Visa Details** for more.
- **Seamans Book Details** — enter the Issuing Country and Seamans Book Number.

Click **Save** to store them for travel and maritime identification.

FAQs

Q Can I record more than one passport or visa?

Yes — use **Add Passport Details** and **Add Visa Details** to record additional documents beyond the primary one.

Contact & Social

Your address, emergency contact and social links.

Address

1. Open the **Address** tab.
2. Complete **Address Line 1, Address Line 2, Post Code, City, State, Country** (dropdown) and **Zip/Postal Code**.
3. Click **Save**.

Your address is stored for official correspondence.

Emergency contact

1. Open the **Emergency Contact** tab.
2. Enter **Name, Relationship, Phone Number, Email, Address, Country** (dropdown), **City, State, Post Code**.
3. Answer **"Does the Contact Speak English? (Yes/No)"** and click **Save**.

Social links

On the **Social Links** tab, fill in any of **Website, Facebook, Instagram, Youtube, Twitter, LinkedIn** and click **Save** (or **Reset** to revert).

Certificates & Files

Manage your certificates and your personal files.

Certificates

1. Open the **Certificates** tab.
2. Each row shows: Certificate Name, Number, Frequency, Issuer, Duration, Issue Date, Notification Date, Expiry Date, Notes, Status, plus **Actions** (scroll horizontally for all columns).
3. Click **Bulk Upload** to add many certificates at once, or **Export** to download your list.

Certificates appear with their status; expiry and notification dates drive renewal reminders. **"No Rows To Show"** means none exist yet (or the list is loading) — add one via Bulk Upload, then **Refresh**.

File Manager

1. Open the **File Manager** tab.
2. Browse the folder tree on the left (e.g. SEA, Medical Info, Leave Request, Crew Docs) or the grid on the right.
3. Click **New folder** to create a folder, or **Upload** to add files. Use **Sort by, Refresh**, the search box, and the grid/list toggle (top-right).

GOOD TO KNOW

Downloading or uploading files may require confirmation depending on your environment's policies.

Employment & SEA

The Employment tab (sub-tabs: SEA, Leave Details, Bank Details, Payslip) holds your seafarer employment agreement, bank details for payroll, and your payslips. This is where pay is calculated — and where most pay questions are answered.

View and manage your SEA

The **SEA** sub-tab opens by default. Review **SEA Details**: Hire Date, End Date, SEA Type, Currency, Salary, Salary Calculation, Insurance, Social Security, Bank Charges, Location Agreement and Reason — each shows a **Previous** value so you can see what changed. A status badge (e.g. **Ended**) shows the current state, and the right-hand timeline lists every **SEA Start** and **Amendment** (each with view/edit/delete icons). To begin a new contract, click **SEA Actions → Start SEA**.

How salary calculation works

Your SEA defines both a **Salary** and a **Salary Calculation** method — and the *method* determines the figure on a payslip, not just the headline salary. For example **“Salary ÷ 30 days”** divides the monthly salary across 30 days to get a daily rate; for a partial period the payslip multiplies that daily rate by days worked, which is why a payslip can be smaller than the full monthly salary.

PAYSLIP TOTAL SURPRISED YOU?

Two crew with the same headline salary can see different totals — a different **Salary Calculation** method, a different **Currency**, or deductions (Insurance, Social Security, Bank Charges) and adjustments (Location Agreement) all feed the final number. Check the SEA's Salary Calculation and deduction fields first.

Bank details for payroll

ENTER YOUR OWN BANK DETAILS

This is sensitive financial information — enter your own account numbers yourself; don't have anyone else fill these in for you.

1. Open **Employment → Bank Details**.
2. Complete the Primary Bank fields: Notes, Account Name, Account Number, Iban, Swift Code, BIC, Bank Name, Bank Address, Bank Zip Code, Country.
3. Click **Add Bank Details** for a second account, then **Save**.

Generate a payslip

BEFORE YOU START

You need an **active SEA** covering the pay period — without one, the total stays at \$0.00 and you'll see an error.

1. Open **Employment → Payslip** and click **Generate Payslip** (top-right).
2. Expand **Payslip Information** and set the **Payslip Range Date**.
3. Tick **Biweekly** for a two-week period instead of monthly.



4. Review the **Total Monthly Salary** summary, then click **Confirm**.

The payslip is added to the **Payslip History** table (Payslip Range Date, Paid Status, Deduction, Bonus, Gratuity, Salary).

"YOU DON'T HAVE ANY ACTIVE CONTRACT IN THIS TIME PERIOD"

The selected range falls outside any active SEA, so there's nothing to calculate (Total stays \$0.00). Pick a range your SEA covers, or start/amend a SEA on the **SEA** sub-tab first.

Leave

Request leave, track your balance, and understand how different leave types affect accrual and deductions. Leave entitlement is set on **Employment** → **Leave Details**.

How leave types affect your balance

Not every leave type behaves the same way — the most common source of balance confusion. The Request Leave form spells out the rules:

- **Don't deduct** from available leave: Sick, Study, Unpaid and Shore Leave.
- **Stop accrual** while taken: Annual, Study and Unpaid.
- **Keep accruing** while taken: Compassionate, Compensatory, Rest Days, Rotation, Shore Leave and Sick Leave.
- **Travel Days** — don't deduct from your balance, but you do keep accruing.

BALANCE DIDN'T DROP?

If your **Available Leave** didn't fall after a leave was approved, it's almost always because that leave type is **non-deducting** — not a bug.

Request leave

1. Open the **Leave** tab and click **Leave** (top-right) to open the Request Leave form.
2. Read the **Leave Guidelines**, then choose a **Leave Type**.
3. Set the **Leave Date Range**.
4. Review **Leave Days Deducted** and **Flight Deducted**, add **Comments**, and use **Add Travel Days** if applicable.
5. Attach any documents under **Images / Files**, then submit.

Your request appears in the leave table with a status (Approved/Pending) and updates your balance per the leave type's rules.

View your balance & history

The Leave tab shows three summary cards — **Total Approved Leave**, **Daily Accrued Leave** (how much you earn per day, e.g. 0.093) and **Available Leave** (current usable balance) — above a table of **Leave Type**, **Start Date**, **End Date**, **Travel Days**, **Leave Days Deducted**, **Flight Deducted**, **Status**, **Comments** and **Actions**.

FAQs

Q How is my leave entitlement calculated?

It's set on **Employment** → **Leave Details**: Leave Type, Calculation Method (e.g. **Days Per Year ÷ 365**), Leave Entitlement, Leave Renewal Date, Leave Carried Over, Daily Accrued Leave and Available Leave. "Days Per Year ÷ 365" converts your annual entitlement into a daily accrual rate that builds your balance day by day; unused balance at renewal shows as "carried over."

21 **THEME CUSTOMIZER** 4 SECTIONS

Introduction

Personalize the look and feel of Aquator — theme mode, colours, navbar and footer behaviour, layout, and page transitions — and make those changes stick.

Open the Theme Customizer

1. In the top-right corner, click your **profile avatar** (shows your name and role).
2. In the dropdown, click **Theme Customizer**.
3. The panel slides in from the right, headed **“Customize & Preview in Real Time.”**

You can also click the **customizer icon** in the top navbar to open the same panel. It has seven sections: **Theme Mode, Theme Color, Navbar Type, Navbar Color, Layouts, Footer Type** and **Transitions**. Any option you pick previews immediately on the page behind the panel.

Preview vs Save — the key rule

A PREVIEW IS NOT A SAVE

Every change previews in real time, but selections are **not persisted** until you click the orange **Save** button at the bottom of the panel (below Transitions). Close the panel, change pages or refresh without saving and your choices roll back to the last saved state.

To save: make your changes, scroll to the bottom of the panel, and click **Save**. Your selections are stored to **your own user profile** — each person sets their own theme — and stay applied across devices, page loads and future sessions.

FAQs

Q Why did my theme changes disappear?

You previewed changes but didn't click **Save**. Reopen the customizer, reapply your choices, and click the orange **Save** button at the bottom to make them permanent.

Q I don't see a Save button.

It sits below the **Transitions** section — scroll the panel down to the bottom.

Theme Mode

Theme Mode controls the overall brightness scheme of the interface. There are four options — the difference between the middle two trips most people up.

Change Theme Mode

1. Open the Theme Customizer.
2. Under **Theme Mode**, choose **Light**, **Dark**, **Semi Dark** or **Navigation**.
3. Click **Save**.

The interface switches modes instantly in the preview; the active mode is outlined in orange.

What each mode means

MODE	WHAT IT DOES
Light	Light backgrounds throughout, for bright environments.
Dark	Dark backgrounds throughout, for low-light comfort.
Semi Dark	A mix — the navigation/sidebar uses a dark treatment while the main content area stays light. Choose this for a dark menu without dimming your working area.
Navigation	Themes the navigation chrome, leaving content presentation otherwise standard. Use it when you mainly want the menus styled rather than the whole canvas.

TWO THINGS WORTH KNOWING

Semi Dark darkens only the sidebar/menu — the content area stays light — and it isn't offered while you're on the **Horizontal** layout. **Navigation** applies its own navigation styling and **hides the Theme Color and Navbar Color controls**, so custom colours don't apply while it's selected.

The navbar dark Mode toggle

SAME SETTING, ONE-CLICK SHORTCUT

The **dark Mode** toggle in the top navbar maps to this same setting — flipping it moves your Theme Mode selection (e.g. between Light and Dark). Use the customizer when you want the extra modes (**Semi Dark**, **Navigation**) the simple toggle doesn't expose.

FAQs

Q Is the navbar "dark Mode" toggle different from Theme Mode?

No — they control the same setting. The toggle is a one-click shortcut for the Theme Mode option; opening the customizer afterward reflects the toggle's state.

Colors

Set the app's accent colour and the top navbar colour independently — from presets or a custom hex shade.

Set Theme Color and Navbar Color

1. Open the Theme Customizer.
2. Under **Theme Color**, click a preset swatch to set the app's accent colour.
3. For a custom colour, click the last swatch (the colour-picker tile showing a hex value like #ffffff) and choose a shade, or type a hex code.
4. Repeat under **Navbar Color** to colour the top navigation bar independently.
5. Click **Save**.

Buttons, highlights and active states update to the Theme Color; the navbar updates to the Navbar Color. Both preview live.

TWO SEPARATE CONTROLS

If your navbar colour didn't change when you picked a Theme Color, set the navbar shade in the **Navbar Color** section — they're independent. If a light navbar makes text hard to read, pick a darker swatch or pair it with a darker Theme Mode for contrast. In **Navigation** Theme Mode these colour controls are hidden — switch to another mode (e.g. Light or Dark) to set custom colours.

FAQs

Q Can I use a custom brand colour instead of the presets?

Yes. In both **Theme Color** and **Navbar Color**, the row of swatches ends with a colour-picker tile (showing a hex value like #ffffff). Click it to open a picker or type a hex code for any custom shade. Remember to click **Save**.

Layout & Display

Control the structural chrome: how the navbar behaves, where the menu sits, the footer, and page transitions. Each option previews live and needs a **Save** to stick.

Navbar Type (Static, Sticky, Floating)

Under **Navbar Type**, choose one (the selected one shows an orange border):

- **Static** — the navbar scrolls away with the page.
- **Sticky** — the navbar stays pinned to the top as you scroll.
- **Floating** — the navbar detaches slightly from the top edge as a floating bar.

Layout (Vertical, Horizontal, Collapsed)

Under **Layouts**, choose:

- **Vertical** — the main menu sits in a left sidebar (default).
- **Horizontal** — the menu moves to a top bar across the page.
- **Collapsed** — the left sidebar shrinks to icons only, freeing horizontal space.

SIDEBAR ONLY SHOWS ICONS?

You're on the **Collapsed** layout — switch to **Vertical** to restore the full sidebar with labels.

Footer Type (Hidden, Static, Sticky)

- **Hidden** — no footer is shown.
- **Static** — the footer appears at the bottom of page content.
- **Sticky** — the footer stays pinned to the bottom of the viewport.

Page Transitions

Under **Transitions**, open the dropdown (default **Fade**) and pick **Fade**, **Fade In Left**, **Zoom In** or **None**. The chosen animation plays each time you move between pages; choose **None** to disable page animations entirely.

DON'T FORGET TO SAVE

All of these preview live but only persist after you click the orange **Save** button at the bottom of the panel.



22

SIDEBAR SETTINGS 3 SECTIONS

Introduction

Sidebar Settings lets you **declutter your left-hand menu** by hiding the modules you don't use and keeping the ones you do — a personal layout that's yours alone.

Open Sidebar Settings

1. In the top-right corner, click your **profile avatar** (shows your name and role).
2. In the dropdown, click **Sidebar Settings**.
3. A dialog opens, titled "**Sidebar Settings**," listing every menu group and item you can access, each with an on/off switch.

Switch on/off, then Save

NOTHING CHANGES UNTIL YOU SAVE

Flipping switches in the dialog only stages your choices. They take effect on the sidebar **only after you click the orange Save button** at the bottom of the dialog. Close the dialog without saving and your switches roll back to the last saved state.

To apply your layout: turn items on or off, then click **Save**. The dialog closes, a success message appears, and your left sidebar immediately reflects what you kept visible.

What you start with

By default **every item you have access to is switched on** — the sidebar shows your full menu until you choose to hide something. Hiding items here never removes a feature; it only tidies your own menu, and you can switch anything back on at any time.

FAQs

Q Where is Sidebar Settings?

Click your **profile avatar** in the top-right, then **Sidebar Settings** in the dropdown menu.

Q My sidebar changes didn't stick.

You likely closed the dialog without saving. Reopen **Sidebar Settings**, set your switches, and click the orange **Save** button at the bottom.



Show & hide items

The dialog mirrors your sidebar's structure — top-level groups, their sub-items, and any items nested below those — so you can hide as much or as little as you like.

Group switches & expanding

Top-level menu groups (the ones that contain several items) appear as **expandable rows**. Each has a switch on the right and an arrow to open it:

- **The group switch** — turning a whole group off hides the group and everything inside it from your sidebar in one move.
- **Click the row to expand** — this reveals the individual items (and any sub-items beneath them), each with its own switch, so you can hide just part of a group.

SWITCHES STAY IN SYNC

If you switch off **every** item inside a group, the group switch turns off automatically. Switch any item back on and the group switch comes back on — so a group is “on” whenever at least one of its items is visible.

Single items & nested items

A menu entry that isn't a group (a single destination) shows as one row with a switch — flip it to show or hide just that page. Some items have their own sub-items nested a level deeper; expand the parent to reach them, and toggle each independently. Turning a parent off hides all of its children with it.

Bring an item back

1. Open **Sidebar Settings** from your profile avatar.
2. Find the group or item (expand the group if needed) and switch it back **on**.
3. Click **Save**. It reappears in your sidebar.

FAQs

Q How do I hide a whole section at once?

Turn off the **group's switch** at the top level — the entire group and its items disappear from your sidebar after you Save.

Q I only want to hide one page in a group.

Click the group row to **expand** it, switch off just that one item, leave the rest on, and click **Save**.

Q Why did a group turn off by itself?

Because you switched off every item inside it. A group is only “on” while at least one item under it is visible — switch any item back on to re-enable the group.

Scope & permissions

Sidebar Settings is a **personal preference**, not an access control. Knowing the difference avoids two common surprises.

It only changes your own sidebar

Your sidebar layout is saved to **your own user profile** and follows you across devices and sessions. It does **not** affect what your colleagues see — each person tailors their own menu, and hiding an item for yourself leaves everyone else's sidebar untouched.

Hiding is not the same as removing access

A HIDDEN ITEM IS STILL ACCESSIBLE

Switching an item off only takes it out of **your menu** — it doesn't revoke any permission. You (or anyone) can still reach the feature by other routes, and the data is unchanged. To genuinely restrict who can *access* a module, use roles and permissions in User Management — not Sidebar Settings.

What appears in the list

The dialog only lists the modules **you already have access to** — it's built from your current permissions. If a feature you expect isn't in the list at all, it's a **permissions** matter rather than a Sidebar Settings one: ask your administrator to grant access. Section headings and links that open external sites aren't toggleable and won't appear as switches.

FAQs

Q Does hiding a module stop other users seeing it?

No. Sidebar Settings is per-user — it changes only your menu. Other people keep their own layout.

Q I hid a module — is it now "turned off" or restricted?

Neither. The feature still works and your access is unchanged; it's simply not shown in your sidebar. Switch it back on and Save to see it again.

Q A module I need isn't even listed in Sidebar Settings.

That means you don't currently have permission for it — the list is built from your access rights. Ask your administrator to grant the relevant role or permission.

23 **WHITE LABELING** 4 SECTIONS

Introduction

White Labeling lets approved partners, management companies and resellers deliver the full Aquator platform under their **own brand**. To their crew, clients and owners the app looks like the partner's own product — while running on Aquator's infrastructure, modules and updates underneath.

What white labeling changes

A white-labeled environment re-skins the entire experience — brand name, logos, colours, favicon, login and loading screens, system emails and exported reports — but it does **not** change any functionality. Every module (accounting, crew, maintenance, subscriptions and the rest) and every platform update is included automatically.

BRANDING, NOT A DIFFERENT PRODUCT

White labeling changes the **presentation** of Aquator, not what it does. Your team gets the same features and the same updates — just with your brand on them.

How it differs from the Theme Customizer

The **Theme Customizer** is a personal setting — each user picks their own colours and layout, saved to their profile. **White Labeling** is an account-level brand identity that applies to *everyone* who opens the branded address, and covers things the customizer can't: brand name, logos, favicon, sub-domain, branded emails and branded reports.

How it's set up

White labeling is configured for you by the Aquator team and linked to your company account — it is not self-serve from inside the app. Once it's live, anyone visiting your branded address sees your identity automatically. To request or change a white-label brand, contact Aquator support with your brand assets (see **Branding Options** for the full checklist).

FAQs

Q Do we lose any features when white labeled?

No. White labeling only changes how Aquator looks. All modules and future updates are included exactly as before.

Q Is this the same as the Theme Customizer?

No. The Theme Customizer is a per-user preference. White Labeling is an account-wide brand identity that also covers your name, logos, favicon, sub-domain, emails and reports.

Branding Options

Everything you can customise on a white-label brand. Provide these assets to Aquator support and they're applied across the platform.

Brand identity

OPTION	WHAT IT CONTROLS
Brand name	The product name shown in the browser tab, the installable app, and throughout the interface.
Sub-domain	Your dedicated branded address — the path that loads your theme automatically (see Your Branded Address).
Website URL	Your own website, linked from the branded experience.
Terms & Conditions URL	A link to your own terms instead of the default.
Favicon	The browser/tab icon and the icon used when the app is installed.

Colours

- **Primary / theme colour** — buttons, highlights and active states across the app.
- **Navigation colour** — the top navigation bar (defaults to the Aquator orange if not set).
- **Layout background colour** — the background of the login and layout shell.

Logos

You can supply separate logos for different placements so each one looks right in context:

LOGO	WHERE IT APPEARS
Desktop logo	The main logo on desktop screens.
Mobile logo	A compact logo for small screens.
Layout logo (light)	The logo in the app layout / loading screen on light backgrounds.
Dark layout logo	A variant used on dark backgrounds for contrast.
Email template logo	Your logo on system emails (welcome, verification, notifications).
Report logo	Your logo on generated documents and reports.
Purchase report logo	Your logo specifically on purchase / financial reports.

VERTICAL LOGO OPTION

If your logo reads better stacked (mark above wordmark) than wide, ask for the **vertical logo** option so it's laid out correctly.

“Powered by Aquator” badge

By default a small **Powered by Aquator** credit is shown. White-label brands can request to **hide** it for a fully unbranded experience.

Branded Experience

Your branding doesn't stop at the dashboard — it carries through every touchpoint a user sees.

Where your brand shows up

- **Browser & tab** — your brand name as the page title and your favicon.
- **Login & loading screens** — your logo, colours and background.
- **In-app navigation** — your logo and theme colour throughout.
- **System emails** — welcome, verification and notification emails carry your email logo.
- **Reports & documents** — exported PDFs and purchase/financial reports carry your report logo.

Installable app (PWA)

When a user installs Aquator to their phone or desktop from your branded address, it installs as **your** app — your name and icon on the home screen, your theme colour on the splash screen. They never see the Aquator name.

AUTOMATIC THEMING

The branding applies the moment a user opens your branded address — the title, favicon, colours and logos all switch to your identity with no action needed from the user.

FAQs

Q Will users see the Aquator name anywhere?

With the **Powered by** badge hidden, the visible experience — app, emails and reports — carries only your brand. (Aquator remains the underlying platform provider.)

Your Branded Address

Each white-label brand has its own **sub-domain** — a unique address that automatically loads your theme. Aquator recognises the brand from the address and re-skins everything before the user signs in.

How the address works

Your sub-domain is the part of the link that identifies your brand (for example **your-brand**). When someone opens your branded link, Aquator loads your logos, colours, favicon and name automatically — including on the login screen, before any account exists.

BOOKMARK THE BRANDED LINK

Always share and bookmark **your** branded address with your team. Opening the generic Aquator address won't apply your branding.

Partner-controlled onboarding

In a white-labeled environment, the open **self-registration**, **contribute** and **invite-members** flows are turned off. This is intentional — **you** control who joins and how, rather than people signing themselves up. Add and manage users through the normal user-management tools for your account.

FAQs

Q Why can't users self-register on our branded site?

Public self-registration is disabled by design on white-label brands so that you control onboarding. Add users through your account's user-management instead.

Q My branding didn't load — why?

You likely opened the generic address rather than your branded sub-domain link. Use the branded link your administrator shared — branding is applied from that address.



24 THIRD-PARTY INTEGRATIONS 4 SECTIONS

How integrations work

Integrations connect Aquator to the outside tools you already use — accounting, expenses, cards and file storage — so your data flows automatically instead of being keyed in twice.

Where to find integrations

1. Open **Settings** in Aquator.
2. Go to the **Integrations** tab.
3. You'll see a searchable grid of tools. Anything you've already connected appears at the top under **Connected** with a green dot; everything else is under **All Integrations**.

Use the **search box** in the top-right to jump straight to a tool by name or category.

Access comes first

No integration is switched on by default. Before any tool will connect, you need to **request access** — contact your administrator (or the Aquator team) to have it enabled for your account. Until access is granted, clicking a tool shows a **"Contact Us"** prompt instead of connecting.

THE ORDER IS: GET ACCESS, THEN CONNECT

This applies to *every* integration — including **Xero, Centtrip, Expensify** and **Box**. Once your administrator enables the integration, you can complete the connection yourself from **Settings → Integrations**. See **Request an Integration** for how to get access, then **Connect & Disconnect** for the steps.

Is it secure?

YOU AUTHORISE ON THE PROVIDER'S OWN SITE

Connecting an integration sends you to the provider's official sign-in to approve access (Box, Xero and Centtrip), or asks for secure API credentials in a dialog (Expensify). Aquator never sees or stores your provider password — and you can disconnect at any time.

FAQs

Q Do integrations cost extra?

Each plan includes a set number of integrations, and you can add more. See **Request an Integration** for how allowances work.





Available Integrations

These four integrations have a ready-made connection flow. Once your administrator has **enabled access** for your account, you can complete the connection yourself from **Settings → Integrations**.

What you can connect once access is granted

INTEGRATION	CATEGORY	WHAT IT DOES IN AQUATOR
Xero	Cloud accounting	Links your Xero organisation so your chart of accounts, transactions and payments stay in sync with Aquator's accounting.
Centtrip	Cards & payments	Brings your Centtrip accounts, cards and card transactions into Aquator for tracking and reconciliation.
Expensify	Expense management	Imports your Expensify expense reports into Aquator so spend lands in one place.
Box	File storage & sharing	Connects Box so you can store and share documents and files alongside your vessel records.

CHOOSING YOUR XERO ORGANISATION

When you connect **Xero**, you'll also choose which Xero **organisation** to link — handy if your Xero login has access to more than one.

FAQs

Q Don't see the tool I use here?

The Integrations page lists many more tools beyond these four. They're available on request — see **Request an Integration**.





Connect & Disconnect

Once access is enabled for your account, connecting takes a couple of clicks — and you stay in control, disconnecting whenever you like.

BEFORE YOU START: GET ACCESS

The integration must be **enabled for your account** first. If it isn't, clicking the tool shows **"Contact Us"** instead of connecting — request access from your administrator (see **Request an Integration**), then come back to these steps.

Connect an integration

1. Open **Settings → Integrations**.
2. Find the tool (type its name in the **search box** if it's quicker).
3. Click the integration's **card**.
4. **Authorise the connection:** for **Box, Xero** and **Centtrip** you're taken to the provider's secure sign-in to approve access; for **Expensify** you enter your credentials in a dialog.
5. Once approved you return to Aquator. The card shows a **green dot** and moves up to the **Connected** section.

Disconnect an integration

1. In **Settings → Integrations**, click a **connected** card (the one with the green dot).
2. Confirm **Disconnect** in the dialog.
3. The connection is removed and the card returns to **All Integrations**.

CONNECTIONS ARE PER COMPANY ACCOUNT

An integration you connect applies to your company account, not just your personal login — so your team works from the same connected data.

FAQs

Q I clicked connect but nothing synced.

Make sure you completed the provider's sign-in and approved access — the card should show a green dot when it's linked. If it still doesn't sync, disconnect and reconnect, or reach out to Customer Support.

Q Will disconnecting delete my data?

Disconnecting stops the link with the provider. Data already brought into Aquator stays; new data simply won't sync until you reconnect.

Request an Integration

Requesting access is the **first step for every integration** — the four with a ready-made connection flow (Xero, Centtrip, Expensify, Box) *and* any other tool in the wider catalogue. Nothing is enabled until you ask.

What's in the catalogue

The Integrations page shows tools across many categories, including:

- **Accounting & ERP** — QuickBooks, Sage, Oracle, SAP, Bill.com
- **Banking, cards & payments** — Stripe, PayPal, Square, Wise, Revolut, Monzo, N26
- **CRM & productivity** — Salesforce, HubSpot, Pipedrive, Insightly, Zoho, Asana
- **Charter** — Booking Manager, NauSys
- **Navigation & marine electronics** — Admiralty, Garmin, Raymarine, Furuno, Simrad, NMEA, Czone, Polestar
- **Weather** — Windy, Windfinder
- **Files, messaging, e-sign & automation** — Dropbox, Google Suite, Microsoft Suite, Slack, WhatsApp, DocuSign, Zendesk, Zapier, ChatGPT

How to request one

1. In **Settings** → **Integrations**, click the tool you want.
2. If it isn't self-serve, you'll see a **"Contact Us"** prompt.
3. Let our team know which integration you need — through **Customer Support** (the support chat) or at info@aquatormarine.com.
4. We'll enable it for your account or scope it with you.

Plan allowances

Integrations are included with your plan in set numbers — for example, the **Pro** yacht plan includes 1 integration, and Superyacht tiers include between 1 and 4 (with all integrations on the top tier). If you need more than your plan includes, you can add integrations or contact us.

WHY DO I SEE "CONTACT US" ON A TOOL?

Either the integration is **request-only** (not self-serve yet), or it isn't enabled on your current plan. In both cases, contact us and we'll sort it out.

FAQs

Q Can you build an integration that isn't listed at all?

Tell us what you use — many plans include custom integrations and API access, and our team can scope new connections. Reach out at info@aquatormarine.com.

Q How long does it take to enable a requested integration?

It depends on the tool and your plan. Contact us with the integration you need and we'll give you a timeline.



Aquator on Mobile

Aquator runs in the browser on phones and tablets as well as on a desktop — the layout adapts to the size of your screen, so you can check a task, update the board or look something up from anywhere on board.

What works on mobile

The full platform is available on a mobile browser. Quick, on-the-go actions — checking the In/Out Board, viewing tasks and calendars, looking up a contact or certificate, uploading a photo — are especially handy away from a desk. Heavier work like building reports or large documents is more comfortable on a bigger screen.

Tips for small screens

- Rotate to landscape for wide tables and planners.
- Use the search at the top to jump straight to what you need.
- Tidy your menu with [Sidebar Settings](#) so the modules you use are first.

STAY CONNECTED

Aquator saves and syncs over the internet, so keep a connection when you're entering data. On a weak signal, let uploads finish before moving on.





Install as an App

Aquator can be installed to your home screen or desktop as an app (a **PWA**) — so it opens in one tap, full-screen, with its own icon, just like a downloaded app. There's nothing to get from an app store.

iPhone & iPad (Safari)

1. Open Aquator in **Safari**.
2. Tap the **Share** button.
3. Choose **Add to Home Screen**, then **Add**.

Android (Chrome)

1. Open Aquator in **Chrome**.
2. Tap the **:** menu.
3. Choose **Install app** (or **Add to Home screen**).

Desktop (Chrome & Edge)

1. Open Aquator in Chrome or Edge.
2. Click the **install** icon in the address bar (or the browser menu).
3. Confirm **Install** — Aquator opens in its own window.

BRANDED INSTALLS

If your company uses a [white-label](#) brand, install from your branded address — the app installs with *your* name, icon and colours.

Working On Deck

A few Aquator features are built specifically for use away from a desk — on the dock, at the passerelle or out on the water.

In/Out Board QR check-in

The [In/Out Board](#) lets people set their in/out status from their own phone by scanning a **QR code** — ideal at the gangway without handing a device around. It can also switch status automatically with a **geofence** as people enter or leave a set area.

Shareable links for non-users

Some forms and certificates can be opened from an **external link** — so guests, contractors or surveyors can complete a form or view a certificate on their own phone without an Aquator login (for example a charter guest preference sheet).

FAQs

Q Is there a separate app to download from the App Store / Play Store?

No — Aquator installs straight from your browser as a PWA. You get an app-like icon and full-screen experience without an app store.

Q Will my branding show on the installed app?

On a white-label account, yes — install from your branded address and the app carries your name, icon and theme colour.

Q Does Aquator work offline?

Aquator needs a connection to load and save your live data. Keep a signal when entering information so it syncs.



Common Questions

Quick answers to the questions we hear most often. If you don't find what you need here, every page in this Help Center is searchable from the top, and **Jim**, our in-app assistant, is one click away (see **Still Need Help?**).

Getting started

Q What is Aquator?

Aquator is an all-in-one platform for running a yacht or a whole fleet — accounting, crew, maintenance (PMS), safety and ISM, charters, passage planning, documents and more, in one place. What each person sees depends on their **role** and the account's **plan**.

Q Do I need to install anything?

No. Aquator runs in your web browser. You can also install it as an app on your phone, tablet or computer for one-tap access — see [Mobile & Installable App](#).

Q How do I add my yacht, crew and team?

Set up your vessel in [Yacht Settings](#), add people in [Crew Management](#), and invite logins in [User Management](#). The [Getting Started](#) guide walks through the whole first-time setup.

Your data

Q Can I import existing data or export what's in Aquator?

Yes — bulk imports such as crew/IMO lists and vessel MMSI data are supported, and you can export PDFs, reports, manifests and payslips from the relevant modules.

Q What do all the abbreviations mean (APA, SEA, ISM, MLC...)?

Common ones: **APA** (Advance Provisioning Allowance), **SEA** (Seafarer's Employment Agreement), **ISM** (International Safety Management) and **MLC** (Maritime Labour Convention). Each module's guide explains the terms specific to it.

Login & Access

Most access problems fall into a handful of causes. Work through these before contacting support — they resolve the large majority of cases.

I can't log in

- **Wrong address** — if your company uses a branded (white-label) site, log in from *that* link, not the generic Aquator address. Bookmark the branded link your administrator shared.
- **Forgotten password** — use **Forgot Password** on the login screen to receive a reset email, then set a new password.
- **Account not approved yet** — new self-sign-ups are reviewed before access is granted (typically within 24 hours). Until then the login page won't let you in.

My invitation or set-password link doesn't work

Invitation and "set password" links are time-limited and single-use. If yours has expired or was already used, ask your administrator to re-send the invite from [User Management](#).

Two-factor authentication (2FA)

If 2FA is enabled on your profile, you'll be asked for a code after your password. Lost access to your authenticator? Your administrator can help you reset 2FA. You manage your own 2FA under [Personal Settings → Account & Security](#).

STILL LOCKED OUT?

Clear the saved password, try an incognito/private window, and confirm you're on the correct site address. If it still fails, contact support (see **Still Need Help?**).

Why Can't I See That?

If a module, button or record is missing, it's almost always one of three things: your **role**, your **plan**, or your **sidebar**. Here's how to tell which.

It's a permission

What you can see and do is set by your role's **View / Edit / Delete** permissions. If you can't open a module or a button is greyed out, your role may not have access. An administrator can adjust this in [User Management](#).

It's your plan

Some modules unlock at higher subscription tiers or as add-ons. If a feature isn't available at all for anyone on your account, check [Yacht Plans & Subscription](#) for what your plan includes.

It's hidden in your sidebar

You may have hidden the menu item yourself. Sidebar visibility is a *personal* preference and doesn't affect permissions — restore any hidden items from [Sidebar Settings](#).

FAQs

Q A colleague can see a module but I can't — why?

You likely have a different role. Compare role permissions in [User Management](#), or ask an administrator to grant View access.

Q The module is greyed out with a lock or upgrade prompt.

That feature isn't in your current plan. Review options in [Yacht Plans & Subscription](#).

Fixing Common Issues

Practical fixes for the everyday glitches — uploads, payslips, integrations and reports. Start with the quick checks, then the module-specific tips.

Quick checks first

1. **Refresh the page** — reloads the latest data and clears a stuck view.
2. **Check your connection** — Aquator needs to be online to save and sync.
3. **Try a different browser or an incognito window** — rules out an extension or a cached file.
4. **Update your browser** — use a current version of Chrome, Edge, Safari or Firefox.

A file or photo won't upload

- Confirm the file isn't larger than the allowed size and is a supported type.
- A weak connection can interrupt large uploads — retry on a stronger signal.
- Renaming a file with unusual characters before uploading can help.

Payslips or reports won't generate

- Make sure the underlying records are complete — e.g. a payslip needs employment / SEA and salary details on the crew profile.
- Check you've selected a valid date range or pay period.
- If a PDF doesn't open, allow pop-ups/downloads for the Aquator site in your browser.

An integration isn't syncing

For Xero, Centrip, Expensify or Box, open [Third-Party Integrations](#) and check the connection is still active — access tokens can expire. Disconnect and reconnect to refresh the link.

NOTE THE DETAILS

If you do contact support, noting what you clicked, what you expected and what happened (plus a screenshot) gets you to an answer much faster.

Still Need Help?

If these answers didn't solve it, reach a person quickly — without leaving Aquator.

Ask Jim, in-app

Jim is Aquator's support assistant. Open him from the top navigation bar or the help button on any screen for instant answers, the right guide, and a smooth handoff to the support team when you need a human. See [Customer Support](#) for the full walkthrough.

What changed recently

If something behaves differently than before, it may be a recent update. Check the [Change Log](#) for the latest releases and improvements.

Email our support team

Prefer email? Reach us any time at info@aquatormarine.com and our team will get back to you.

When you contact support

Include: the module and screen you were on, what you were trying to do, what happened instead, and a screenshot if you can. That context lets the team reproduce and fix the issue without a back-and-forth.



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CUSTOMER SUPPORT 4 SECTIONS

Meet Jim

Jim is Aquator's customer support assistant. Whenever you have a question, hit a snag or want to know how something works, Jim is the fastest way to get help — right inside the app, without leaving what you're doing.

What Jim is

Jim is the friendly face of our support team. Ask a question in plain English and Jim answers instantly, pulls up the right help article, and — whenever you need a person — hands the conversation to our human support team without you having to repeat yourself.

ALWAYS IN THE SAME PLACE

Jim travels with you across Aquator. You don't need to open a separate site or raise a ticket — the support chat is one click away from any screen.

When to use Jim

- "How do I...?" questions about any module or feature.
- Something isn't behaving as you expect and you want it checked.
- You want a walkthrough or a link to the right guide.
- You'd like to send feedback or request a feature.

FAQs

Q Is Jim a real person?

Jim is our support assistant and answers most questions instantly. When something needs a human, Jim passes you straight to our support team — with the full conversation, so you never repeat yourself.

Q Does it cost anything to chat with Jim?

No. Support through Jim is included with your Aquator account.



Get help in Aquator

You can reach Jim from anywhere in Aquator in a couple of clicks. There are two ways in — both open the same support chat.

From the top navigation bar

1. Look at the **top-right of the screen**, next to your profile.
2. Click the **Customer Support** icon (the sparkle ✨ icon — hover it and the tooltip reads “Customer Support”).
3. The chat panel opens — type your question and Jim replies.

From your profile menu

1. Click your **profile avatar** in the top-right corner.
2. Choose **Customer Support** from the dropdown.
3. The same chat panel opens.

NO NEED TO GIVE YOUR ACCOUNT DETAILS

Because you’re signed in, the chat already knows who you are — your name and account are securely attached to the conversation. Just ask your question; you don’t have to look up your account number or email.

FAQs

Q I can’t find the support icon.

It’s in the top-right of the navigation bar, near your profile avatar — the sparkle ✨ icon labelled “Customer Support” on hover. If your window is narrow, widen it or open your **profile menu** and choose **Customer Support** instead.

Q Will I lose my place in the app when I open the chat?

No. The chat opens as a panel over your current screen — close it and you’re exactly where you left off.

What Jim can do

Jim is built to get you to an answer quickly — and to a person when that's what you need.

Instant answers

Ask in plain language and Jim responds right away, drawing on Aquator's help content so the answer fits how the product actually works.

The right guide, surfaced for you

When a question is best answered by a full walkthrough, Jim points you to the matching **Help Center** article so you can follow the steps yourself.

A smooth handoff to our team

If your question needs a human — an account-specific change, something unusual, or anything Jim can't resolve — Jim passes the conversation to our support team along with everything you've already said. You won't need to start over or repeat your details.

ONE CONVERSATION, START TO FINISH

Whether Jim answers or a teammate does, it's the same thread. Your history stays in one place, so follow-ups are easy to pick up later.

FAQs

Q Can Jim make changes to my account for me?

Jim answers questions and guides you through the steps. For account-specific changes that need our team, Jim hands you to a teammate who can help directly.

Q What if Jim doesn't understand my question?

Rephrase it, or ask to speak to the team — Jim will connect you to a human who can take it from there.



Help Center & Change Log

Alongside chatting with Jim, two more resources live in the same top navigation bar — handy when you'd rather read up or see what's new.

Help Center

The **Help Center** is our library of guides and tutorials for every module — from accounting and crew to maintenance and subscriptions. Open it from the **Help Center** icon in the top navigation bar, or visit help.aquatormarine.com/help-center. It's the same content Jim draws on, browsable at your own pace.

Change Log

The **Change Log** is where we post what's new — features, improvements and fixes as they ship. Open it from the **Change Log** icon in the top navigation bar, or visit help.aquatormarine.com/change-log.

WHICH ONE SHOULD I USE?

Want a quick answer or a hand with something specific? **Ask Jim**. Prefer to read a full walkthrough? **Browse the Help Center**. Curious what changed recently? **Check the Change Log**.

FAQs

Q Where do I find these in the app?

All three live in the top-right of the navigation bar: the sparkle ✨ icon for **Customer Support** (Jim), and separate icons for the **Help Center** and **Change Log**.