Nautaes Captain Guide — Valeria

What Valeria is

Valeria is your in-app assistant inside Nautaes. Use it to move faster on day-to-day yacht operations: finding suppliers, requesting quotes, tracking orders, and staying on top of schedules—without jumping between WhatsApp, emails, and calls.

Important: Valeria is an AI assistant. It can make mistakes. Always verify critical information (parts compatibility, quantities, delivery details, dates/times, pricing, and safety-related decisions) before confirming.

Where to find Valeria

- Left menu: **Valeria**
- You can also use the Valeria input bar on the Captain dashboard (if visible)

What you can do with Valeria (Captain)

I can help you browse and buy marine products, manage your vessels and crew, check your orders, and handle payments or documents. If you need to request a service, check your calendar, or look up weather forecasts, I can do that too. Would you like to start by shopping for parts or managing your vessel details?

- Request parts or services in plain language
- Find and compare verified suppliers near your current port
- Ask for quotations and follow up on quote status
- Check order status, deliveries, and next steps
- Get help navigating key areas: **Quotations**, **Invoices**, **My Orders**, **Dock Assist**, **Voyages**, **Arrival Planning**, **En-Route**, **Schedules**, **Job Visits**, **Calendar**, **Fleet Management**, **Crew Requests**

Quick start (recommended)

1. Open **Valeria** from the left menu.
2. Type what you need in one sentence.
3. Confirm key details (location, timing, urgency) if Valeria asks.
4. Review the suggested suppliers/next steps.
5. Proceed to the relevant section (Quote, Order, Visit, Calendar) to finalise.

Video walkthroughs (Captain)

1) Find a supplier with Valeria

Watch: https://youtu.be/OyKlmz1iQFA Valeria helps you **find a suitable supplier** inside Nautaes. You describe what you need in plain language and Valeria guides you to the

right place (e.g., Dock Assist / suppliers) so you can quickly identify relevant providers and move to the next step (request availability, request a quote, or open the supplier flow).

2) Order parts with Valeria

Watch: https://youtu.be/2PqR1dDeU7M Valeria helps you **order parts** by guiding you into the **Shops** flow, where you can browse/select items, confirm delivery details, and proceed towards checkout to place the order efficiently.

3) Schedule a job or visit with Valeria

Watch: https://youtu.be/3VfhsJbp0Ak Valeria helps you **schedule work** by setting up a **job and/or an onboard visit**. It guides you to **Schedules / Job Visits / Calendar** so you can choose a date/time window, add notes (location, access, urgency), and organise the visit so the supplier knows when to attend.

4) Accept a quotation with Valeria

Watch: https://youtu.be/YyX_XuayIvE Valeria guides you to **Quotations** to open the quote, review the scope and details (parts/labour, timing, totals), and **accept/approve** it so the job can move forward to the next step (scheduling and/or payment, depending on the service).

Best prompts to use (copy/paste)

Buy engine oil + filters (delivery Palma tomorrow)

- “Show me marine oil and filters available for delivery to Palma, and help me place an order for tomorrow.”
- “Open Shops and show engine oil + filters categories, filtered for delivery to Palma.”
- “I want to buy engine oil and filters for delivery in Palma tomorrow. Show options and what info you need (engine model / oil grade / filter refs).”

Find a verified electrician (near current port)

- “Show me verified electricians near my current port (sorted by fastest response time).”
- “List verified electricians near my current port and let me message/request availability for today.”
- “Show nearby verified electrical suppliers and expand the search radius if none are available.”

Compare quotes (air-con)

- “Show my air-con service requests and any quotes received.”
- “Open Quotations and filter by air-con / HVAC so I can compare what’s available.”

- “Show the latest quotes I’ve received this week and highlight any related to air-con.”

Pending orders (what needs action)

- “Show only the orders that require my action right now.”
- “List my pending service requests awaiting action and tell me the next step for each.”
- “Open My Orders and filter to ‘Submitted’ service requests.”

Schedule a supplier visit (next Tuesday afternoon)

- “Show my availability next Tuesday afternoon in Calendar/Schedules.”
- “Create a draft visit request for next Tuesday afternoon and tell me what details you need to confirm (supplier, location, notes).”
- “Open Job Visits and start a new visit for next Tuesday afternoon (I’ll confirm supplier and time).”

What Valeria will ask you (and why)

To avoid mistakes, Valeria may ask 1–2 clarification questions, typically:

- **Current location / port of call** (so results match where you actually are)
- **When you need it** (today, this week, specific date)
- **Delivery vs onboard service** (parts shipment vs technician visit)
- **Vessel context** (only if missing from your profile)

Tips for faster results

- Include: **what**, **where**, **when**, and **urgency**.
- If it’s a service, add: **access constraints** (alongside, at anchor, time window).
- If it’s parts, add: **brand/model/part number** when you have it.

Common workflows

1) Get a service quote

- Ask Valeria for the service you need
- Review supplier suggestions
- Move to **Quotations** to review and approve

2) Order parts

- Ask Valeria for the items
- Confirm delivery details
- Complete checkout in **Shops / My Orders**

3) Plan and schedule work

- Ask Valeria to help plan timing

- Confirm in **Schedules / Calendar / Job Visits**

Troubleshooting

- If results don't match your area: confirm your **current port/location** in the chat.
- If you can't proceed: check **Quotations**, **Invoices**, or **My Orders** for pending actions.
- If no verified supplier is available: Valeria should explain the gap and suggest next steps.

What to do next

- Watch the video walkthroughs above (supplier search, parts ordering, scheduling, and accepting quotes).
- Then try one of the copy/paste prompts.
- Open **Quotations** to review any new quotes Valeria helped generate.