

YOUR INTRODUCTION TO WORK ORDERS

Tips to Enable Your End Users and Operators

Use this Admin guide to support introducing Work Orders to end users and the people operating them (Assignees/Operators)

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OVERVIEW

A Better Way to Bring Gear Requests Into Cheqroom

What is a Work Order in Cheqroom?

A Work Order is a task or request tied to an asset, equipment process, room, or location, helping teams report issues, assign work, track progress, and make sure the job gets completed and stays tied to the asset history forever.

If your team submits requests for maintenance, event prep, repairs, inspections, or other gear-related tasks, Work Orders give them one structured way to submit what they need, track the work being done, and give Admins one place to keep it all organized.

Work Orders are available for your end users and Assignees/Operators, right where your equipment already lives.

Instead of collecting gear requests and status updates through email, Slack, spreadsheets, or hallway conversations, everything comes in through Cheqroom, tied to the right equipment from the start.

NOTE TO ADMINS

You can control which Work Order types end users have access to at any time from Settings > Work Order Types > Restrictions.

END USER Requests the Work

The person who submits a Work Order or reports that something needs attention.

ASSIGNEE/OPERATOR Completes the Work

The person responsible for carrying out the work, updating the request, and marking it complete. Anyone assigned a Work Order is an Operator regardless of role.

ADMIN Manages the Process

The person who manages the Work Orders setup, permissions, assignments, and overall workflow. Admins can also request or complete work themselves.

What End Users Can Do

An end user is anyone who interacts with equipment day-to-day, checking gear out, flagging an issue, requesting what they need—without managing the system itself.

Whichever Work Order you've enabled, the goal stays the same: get requests in, with the exact details your team needs, tied to the right gear.

- ✓ Request maintenance or repairs
- ✓ Turn flags on equipment into an actionable request
- ✓ Submit event prep or gear setup requests
- ✓ Make request details, timing, and context visible to the whole team
- ✓ Attach the request directly to the relevant equipment
- ✓ Help admins track work from request to completion

What Operators/Assignees Can Do

An Operator isn't a user role, it's a seat type based on what someone does, not their title. Anyone assigned a Work Order is an Operator for that Work Order, whether they're an Admin, a Front Desk Admin, or any other role.

Whichever Work Order you've enabled, the goal stays the same: keep the status, work history, and details all tied to the equipment.

- ✓ Review assigned Work Orders
- ✓ See request details, timing, and context in one place
- ✓ Take action on maintenance, repair, event prep, or gear setup needs
- ✓ Update the Work Order status as work moves forward
- ✓ Attach relevant details like cost, hours worked, replacement parts etc.
- ✓ Help the team track progress from request to completion

NOTE TO ADMINS

Visit the Help Center to see more on [adding Operators](#) to your workspace.

WHY IT MATTERS

The Value

Work Orders help your team move from scattered requests to a process you can actually track.



Submit Requests in One Place

No more requests buried in inboxes, chats, or spreadsheets.



Keep the Work Tied to the Request

Allow the people working them to update in real time and close out with no separate thread to track down later.



Connect Work to the Gear It Impacts

Requests stay tied to the equipment record, so history is easy to find later.



Give Admins All Details Needed Upfront

Defined fields guide users to include the right information from the start.



Integrate with Systems You Already Use

Work Orders connect to your existing ERP, finance, and IT tools, so status and history flow across your stack, not just within Cheqroom.

Popular Integration Partners

Note: These are a small sample of the platforms we integrate with.

CRMs

- Salesforce
- NetSuite
- HubSpot

Service Desk

- ServiceNow
- Jira
- Zendesk

Project Management Tools

- Monday
- Trello
- Asana
- Wrike

HR Systems

- Workday
- Deel

Finance & ERP

- Adobe
- Xero
- Sage
- Odoo
- SAP Ariba

Mapping

- ArcGis

Connected Devices

- Tive

Databases

- Smartsheet
- Airtable
- MS Dynamics
- Snowflake



WMS Platforms



Scheduling Tools



Zapier

TIPS FOR END USERS

Help Your End Users Take Work Orders for a Spin

Here are a few easy ways to introduce Work Orders to your team.

1

Make End Users Aware of Work Orders and Expectations

Let your end users know about Work Orders and what types of requests should now be a Work Order in Cheqroom. Here are some example communications:

NOTE TO ADMINS

Activating Work Orders makes them visible to all end users. Trial Access participants may want to start with a small group of power users before rolling out more broadly.

INTERNAL ANNOUNCEMENT · WORK ORDER TRIAL PARTICIPANTS (AUGUST 2026)

Introducing Work Orders to Your Team

Hi team,

For the next 60 days, we're trying out Work Orders in Cheqroom as a new way for you to submit requests tied to the equipment you use. Starting today, use Work Orders in Cheqroom when you need to submit [placeholder – e.g. a maintenance, repair, or event prep request]. You may spot a new option in your dashboard for this, that's expected, it's part of a trial we're running.

At a high level: Open a relevant Work Order, fill in the details, and submit. We will take the request from there.

[Insert relevant help articles/instructions]

Questions? Just ask.

[Your name]

INTERNAL ANNOUNCEMENT · WORK ORDER TRIAL PARTICIPANTS (AUGUST 2026)**Introducing Work Orders to Your Team**

Hi team,

For the next 60 days, we're trying out Work Orders in Cheqroom as a new way for you to submit requests tied to the equipment you use.

Instead of sending requests through email, Slack, or other channels, please log into your Cheqroom workspace and create a new Work Order when you need to submit things like:

- [Modify this based on your Work Order types]
- Maintenance or repair requests
- Equipment issues
- Event prep or setup needs
- Gear-related tasks that need follow-up

Using Work Orders helps us keep requests organized, connected to the right equipment, and easier to track from start to finish.

To submit one, open the relevant Work Order template in Cheqroom, fill out the details, and submit your request. Include as much context as you can and be sure to fill out all of the available fields, add the item involved, what needs to be done, and any timing details.

Need Guidance? See how to submit a Maintenance Work Order

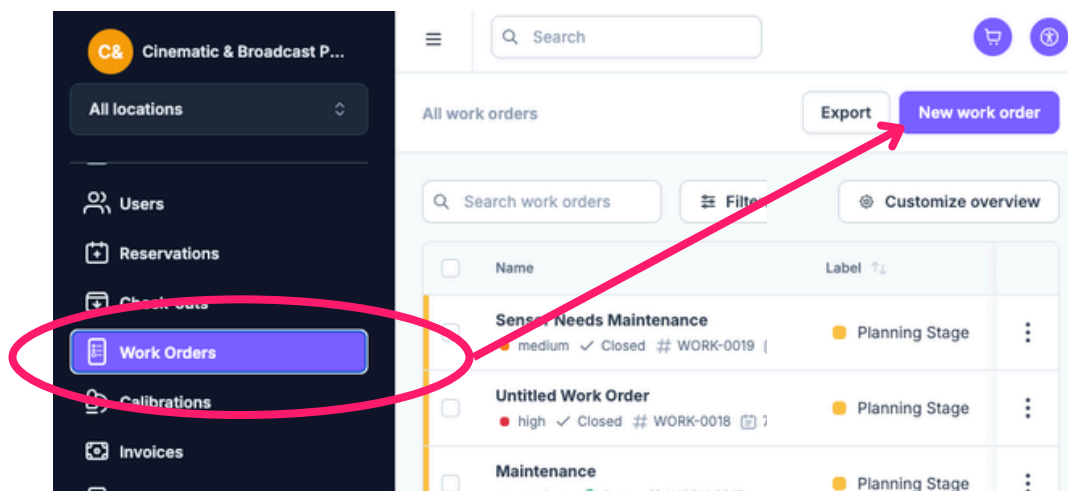
[knowledge.cheqroom.com/helpcenter/how-to-submit-a-maintenance-request] or Event Prep ticket

[knowledge.cheqroom.com/helpcenter/how-to-build-an-event-prep-request]

Thanks for helping us test this new workflow!

Questions? Just ask.

[Your name]



2

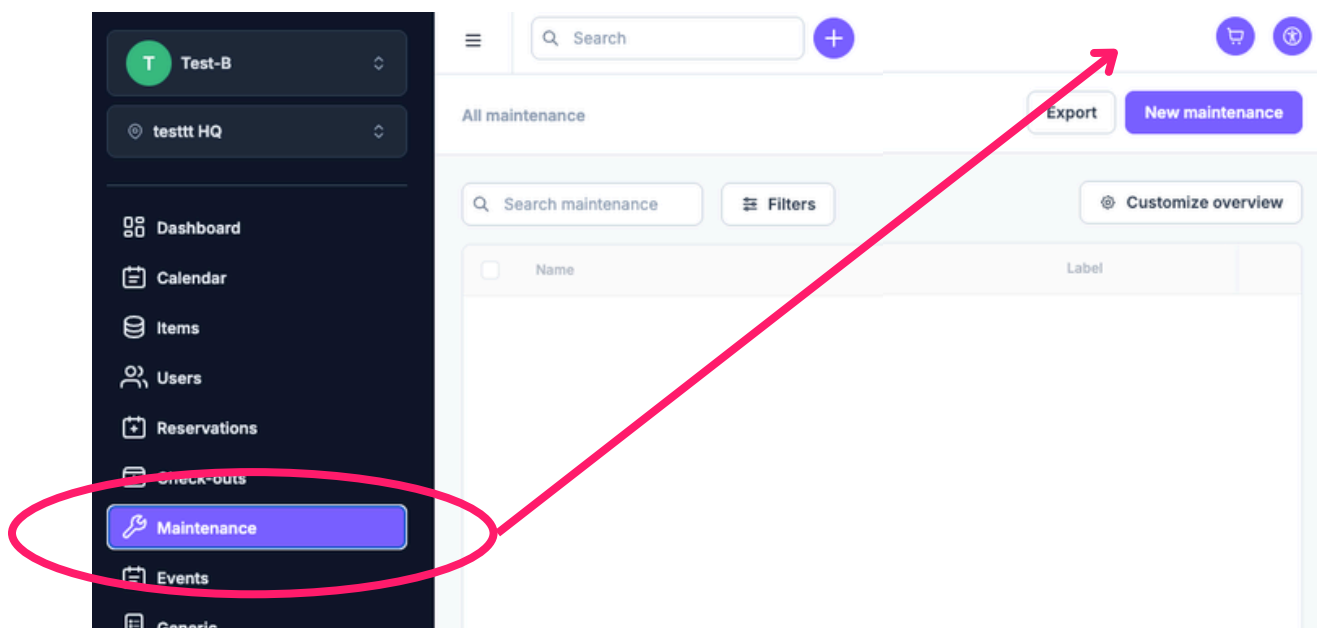
Point End Users to the Right Steps

If you have multiple Work Orders available, let users know which one to choose and when:

► Maintenance Work Order:

For repairs, inspections, calibration, or equipment issues.

Help Article: [See how to submit a Maintenance Work Order](#)



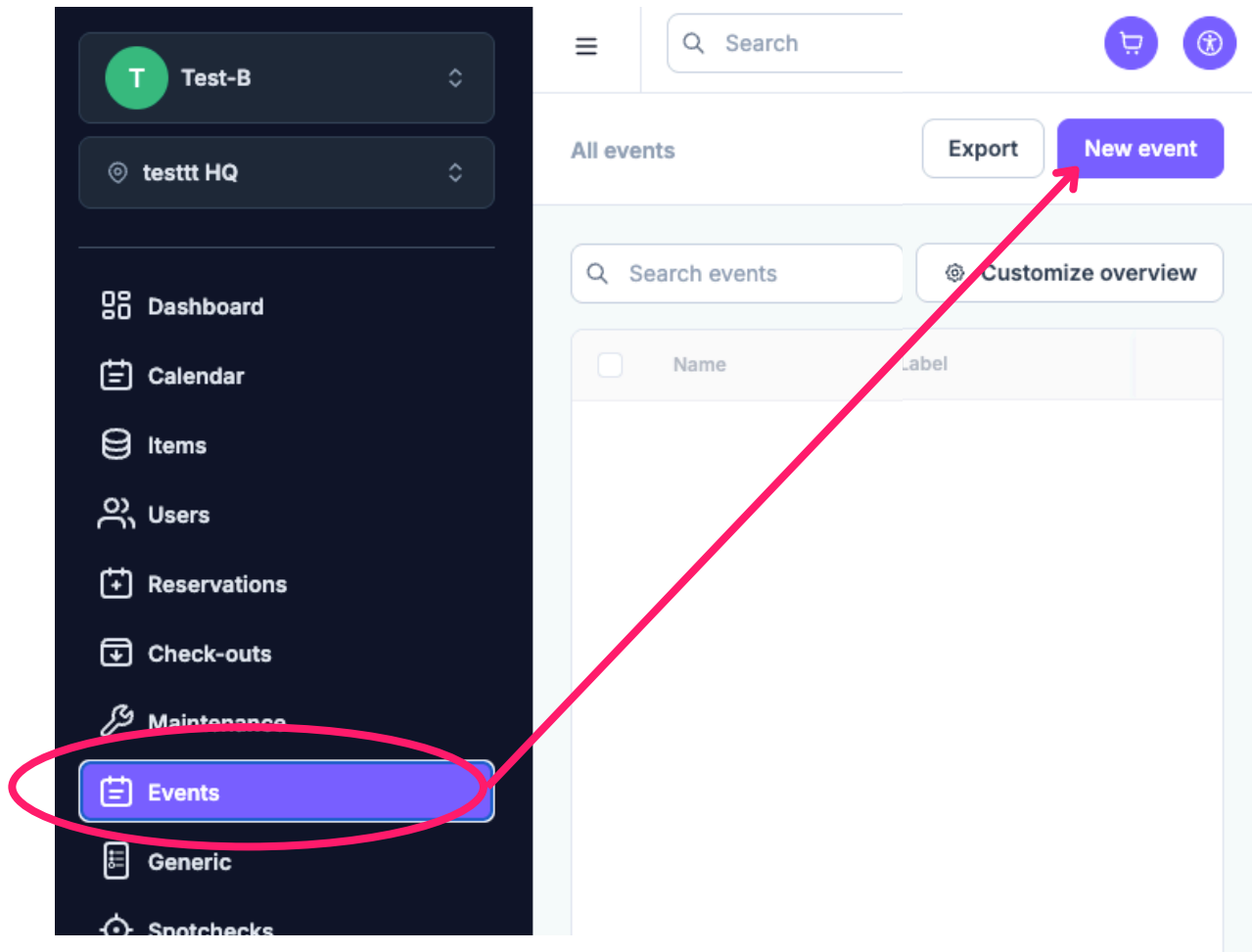
REMINDER

Ensure your team is prepared to enter the default fields to open a Maintenance Work Order and any additional fields you have added. You can see more on the default fields included [here](#).

▶ Event Prep Work Order:

For pulling, prepping, or setting up gear ahead of a shoot, event, or booking.

Help Article: [See how to submit an Event Prep Request](#)



REMINDER

Ensure your team is prepared to enter the default fields to open an Event Prep request and any additional fields you have added. You can see more on the default fields included [here](#).

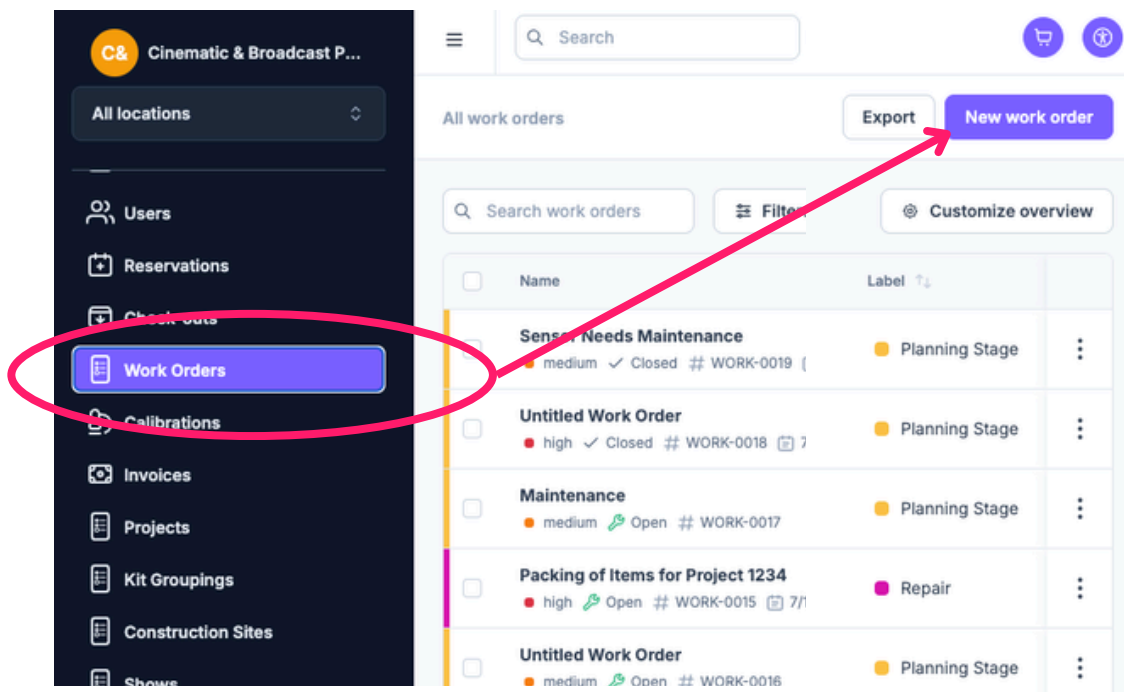
► Create Your Own Work Order:

For any other gear-related request your team wants to track – required fields adjust based on what you've configured.

Help Article: [See how to create a new Work Order](#)

NOTE TO ADMINS

What's **required** will **adjust based** on the fields you've included. [See more on customizing your generic Work Order here.](#)



Need Some Inspo? Explore some of the most popular Work Orders (in addition to Maintenance and Event Prep) available in Cheqroom.

Calibration

[See it in Action](#)

Work Orders

Name Calibrate Sound Level

Location University Sports Center

Assignee Amanda

Description Every 90 Days

Invoicing

[See it in Action](#)

INVOICE

New Projector

Carmen Royale
Carmen@acmecollege.io

Signed on: Jul 15

Logistics

[See it in Action](#)

✓ Gear Booked & Packed

✓ ATA Crate Populated

✓ Shipment Received

Facilities

[See it in Action](#)

Facilities Management

25 Items

Studio 2
Capacity 15
Booked

85% Utilization

Plan Maintenance

3 Show End Users How to Submit a Request

End users can submit a Work Order by opening a new Work Order right from their dashboard, filling out the required details, and submitting the request to your team. If helpful, you can point end users to the following Help Center articles:

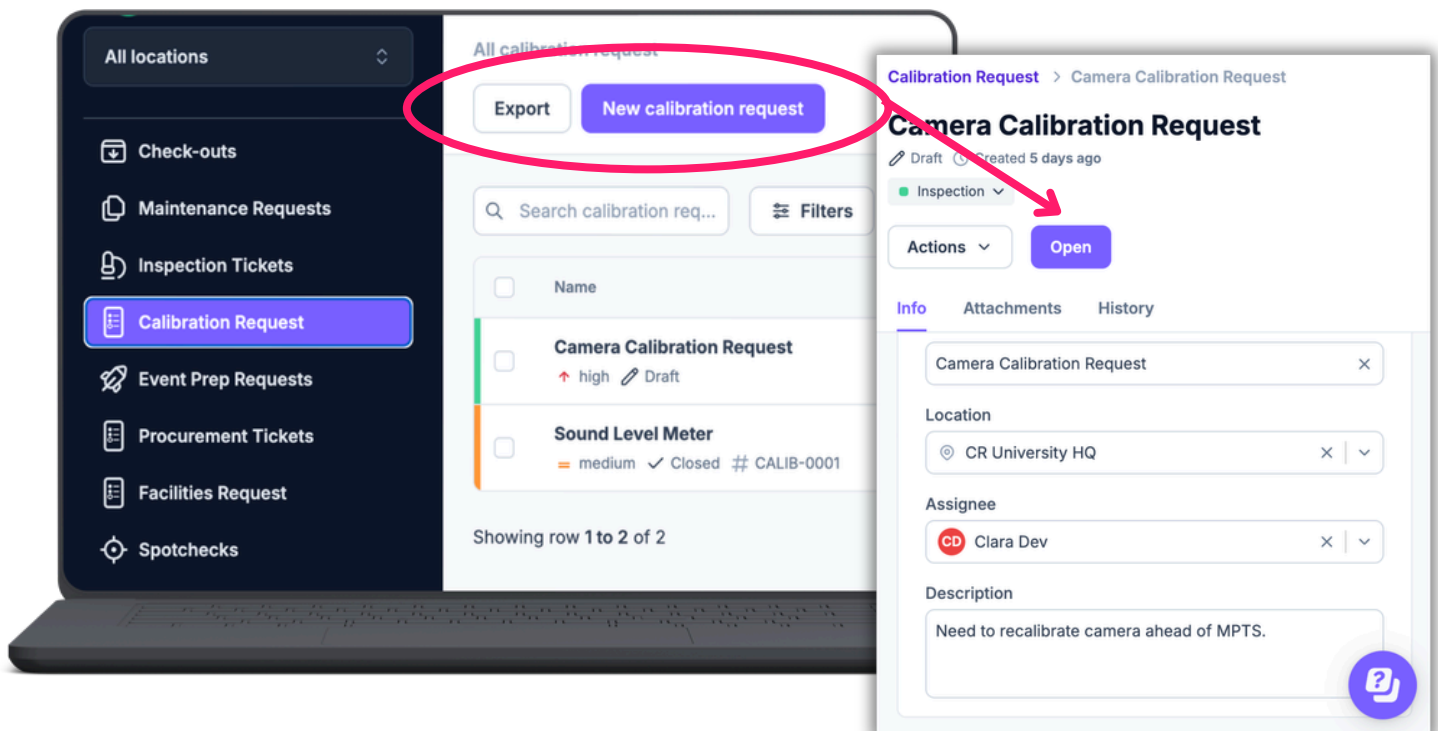
[Trial] [How to Submit a Maintenance Request](#)

[Trial] [How to Build an Event Prep Request](#)

Reminder: You can control which Work Order types end users have access to at any time from Settings > Work Order Types > Restrictions.

NOTE TO ADMINS

What's **required will adjust based** on the default fields and any additional fields you've included.



TIPS FOR ASSIGNEES/OPERATORS

Help Your Assignees/Operators Take Work Orders for a Spin

NOTE TO ADMINS

An Operator is a seat type based on what someone does, not their title. Anyone assigned a Work Order is an Operator for that Work Order, whether they're an Admin, a Front Desk Admin, or any other role. See more about adding Operators [here](#).

1

Make Assignees/Operators Aware They Should Record their Work in Cheqroom

Let your Assignees/Operators know that once a Work Order is submitted, their job is to review it, take action, and record that work directly in Cheqroom – not in email, Slack, or a separate tracker.

INTERNAL ANNOUNCEMENT · WORK ORDER TRIAL PARTICIPANTS (AUGUST 2026)

Recording Your Work Order Updates in Cheqroom

Hi team,

As part of our 60-day Work Order trial in Cheqroom, you may be assigned Work Orders going forward – [placeholder, e.g. maintenance, repairs, event prep, or equipment issues].

Once a Work Order comes your way, please review it, take action, and record that work directly in Cheqroom – not in email, Slack, or a separate tracker. This keeps everything tied to the right equipment and gives the whole team one accurate record of what's been done.

What this looks like in practice:

- Review the Work Order for the details you need (equipment, task, timing)
- Do the work
- Log your notes and update the status in Cheqroom when it's done

A couple of things worth knowing:

- There's no test mode – updates you make reflect the real equipment record right away
- [Placeholder – confirm required fields for closing a Work Order, e.g. notes, parts used, condition]

Questions? Just ask.

[Your name]

INTERNAL ANNOUNCEMENT · WORK ORDER TRIAL PARTICIPANTS (AUGUST 2026)**Recording Your Work Order Updates in Cheqroom**

Hi team,

For the next 60 days, we're trying out Work Orders in Cheqroom as a new way for you to record the work you do around our equipment. Starting today, if you're assigned a Work Order, please record that work directly in Cheqroom (not email, Slack, or a separate tracker). Review it, do the work, then log your notes and close it out in Cheqroom when done.

No sandbox here – updates reflect real equipment right away.

Questions? Just ask.

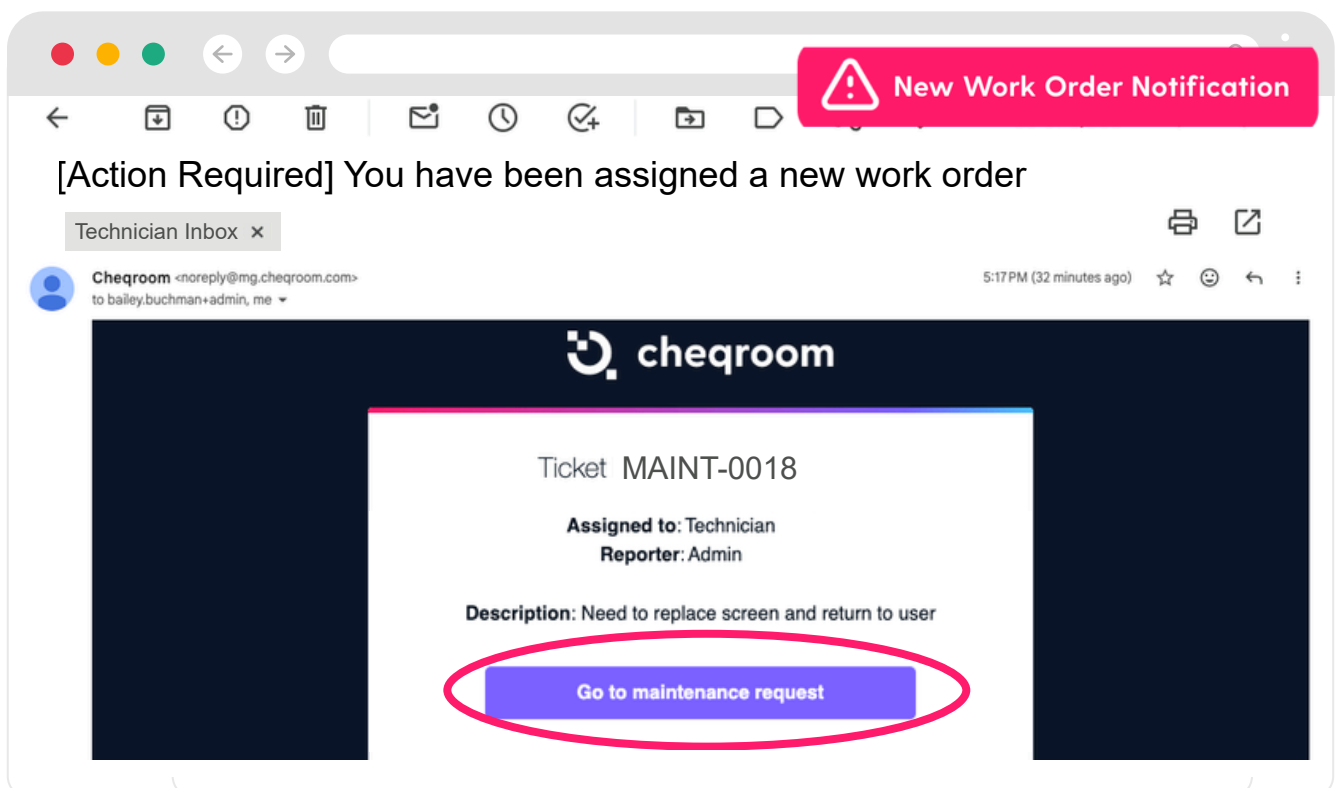
[Your name]

2**Tell Assignees/Operators to Keep an Eye Out for Email Notifications**

Assignees/Operators will get notified when a Work Order is assigned to them. Let them know to watch for these so requests don't sit unaddressed.

REMINDER

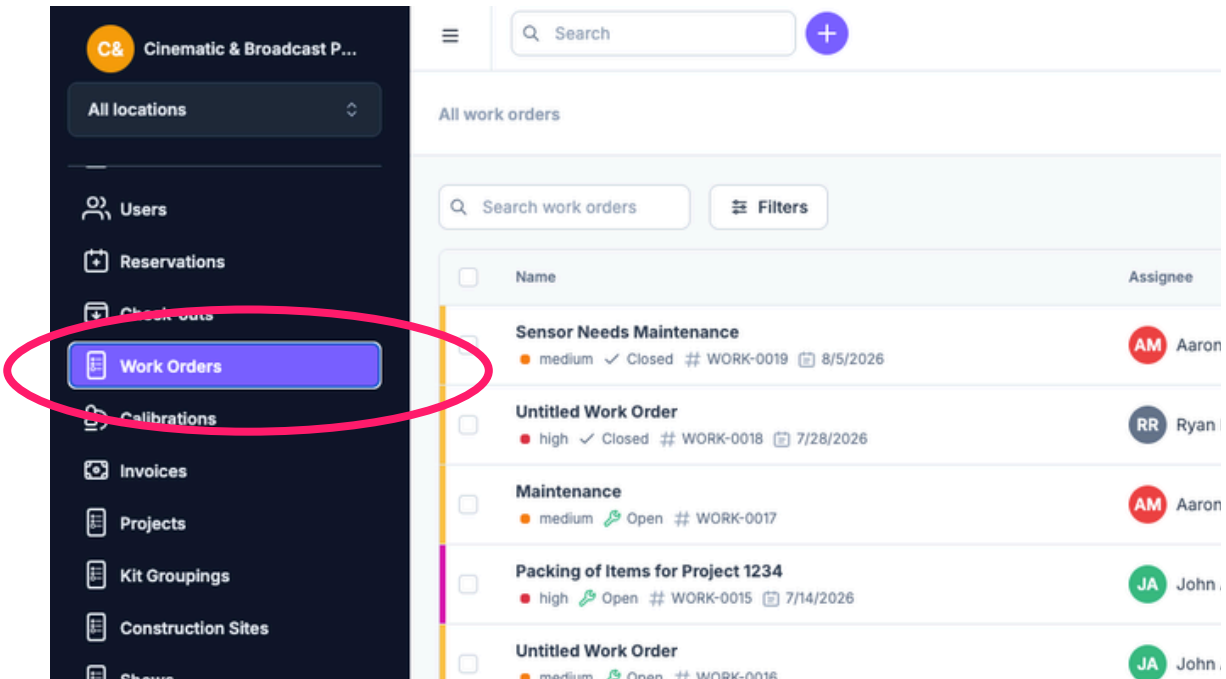
They can also view any open Work Orders by navigating to the left-hand of their dashboard.



3

Show Assignees/Operators Where to Find Their Open Work Orders

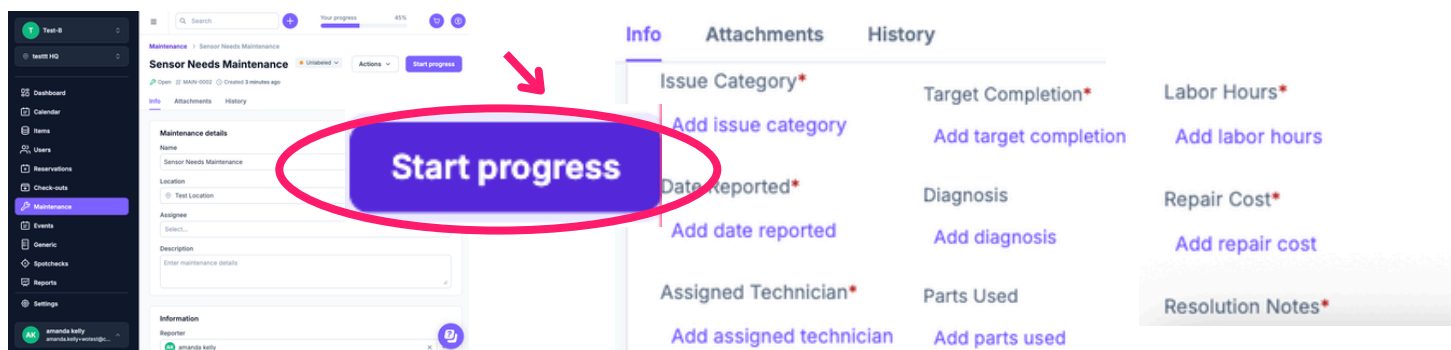
Assignees/Operators can see everything assigned to them from the left-hand navigation in Cheqroom, so nothing gets missed.



4

Show Assignees/Operators How to Update a Work Order

Your Assignee/Operator needs to “Start Progress” on a Work Order to begin tracking their work. As they progress, your team should update the Work Order with important details and notes on what was done. Here is an example of some common fields:



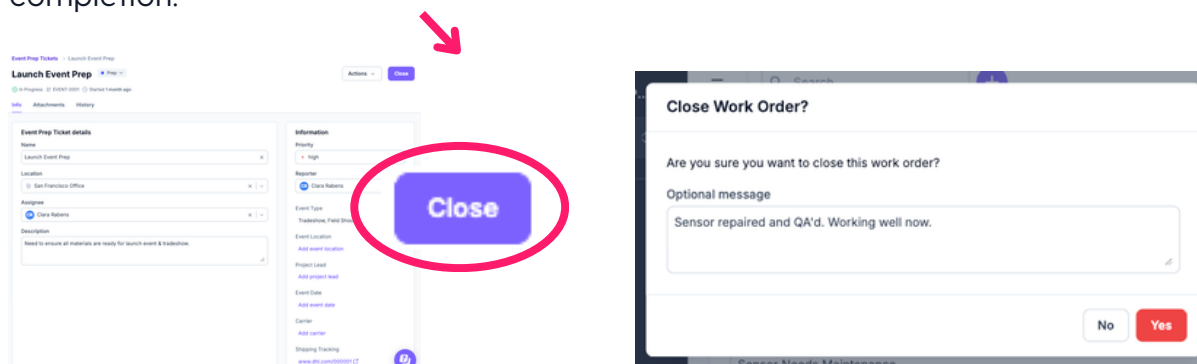
NOTE TO ADMINS

What's required to close a Work Order will adjust based on the fields you've included.

5

Show Assignees/Operators How to Close a Work Order

Once work is complete, Assignees/Operators should update the Work Order with notes on what was done and hit “Close” when work is complete. It will then prompt a final *optional* questionnaire that will be tied to the gear’s history. This keeps the record accurate and lets Admins track progress from request to completion.



6

[For Trial Participants] Remind Assignees/Operators This Is Live, Not a Test Environment

Every Work Order they update reflects real equipment status – there's no sandbox mode. Encourage them to treat it the same way they'd treat any other change to inventory.

Every Request, One Place. Every Action, Fully Tracked

Loving Work Orders? Explore some of the most popular Work Orders available in Cheqroom.



Invoicing

Discover how to manage project invoices in Cheqroom. [Learn more.](#)



Logistics

Streamline your equipment shipping with Logistics Work Orders. [Learn more.](#)



Facilities

Learn how to use Cheqroom to track facility rooms, studio spaces, and custom equipment. [Learn more.](#)



Calibration

Manage service workflows, and ensure industry compliance. [Learn more.](#)



Maintenance

Streamline your repair processes with Cheqroom Maintenance Management. [Learn more.](#)



Event Prep and Planning

Create event-specific templates, manage logistics, and use checklists to ensure gear is show-ready every time. [Learn more.](#)