14-Day Field Software Trial Scorecard

TESTEDFORTRADES

Same tasks on every tool. Score 0 (could not) to 3 (I would trust this on a live call tomorrow). Write what happened, not a gut feeling.

SHOP / TRADE

TEAM SIZE (OFFICE + FIELD)

SOFTWARE AND PLAN TRIALED

TRIAL DATES

Scoring: 0 = couldn't complete 1 = only with workarounds 2 = worked, with friction 3 = would trust this on a live job tomorrow.

TASK	WHAT "DONE" LOOKS LIKE	SCORE	NOTES
1. Create a job	New customer, job address, and work requested (clogged drain, AC not cooling, water heater swap) saved on a job card.		
2. Dispatch it	Assigned to a tech on the calendar, with a clear start window, including after-hours or same-day work if you tested that.		
3. Send an estimate	Quote with labor and materials sent by email or text; you can tell if it was viewed or approved.		
4. Take a payment	Invoice sent; a test or real card/ACH payment recorded against the job (use a small test charge if needed).		
5. Books / QuickBooks	If the vendor claims a QuickBooks (or other accounting) sync, run it. If not claimed, mark N/A.		
6. Phone app, offline	Open the job on a phone, turn on airplane mode, and see what you can still view or complete.		
7. Text a customer	Send a reminder or "on my way" message from the job, and note whether two-way text is on your plan.		

COST MATH (FROM THE VENDOR'S PRICING PAGE)

MONTHLY PRICE ON THE PLAN YOU WOULD ACTUALLY BUY

USERS INCLUDED, EXTRA USER COST, OR JOB CREDITS

PUBLISHED PAYMENT FEES, IF ANY

ADD-ONS YOU WOULD NEED (PHONE, MARKETING, FORMS)

VERDICT AFTER 14 DAYS

☐ Keep ☐ Maybe ☐ No

WHY, IN ONE SENTENCE

COMPARED AGAINST