CHECKLIST FOR
CHOOSING
PLUMBING
SOFTWARE

FieldBin

THE CHECKLIST

DOWNLOADABLE/PRINTABLE CHECKLIST FOR CHOOSING PLUMBING SOFTWARE

HOW TO USE THIS CHECKLIST

1. **Check the Boxes**: Mark the features that are absolutely essential for your plumbing business.
2. **Rate the Importance**: Use a scale of 1 *(least important)* to 5 *(most important)* to indicate how much each feature matters to you.
3. **Add Notes**: Jot down any additional thoughts or questions you have about each feature.

DOWNLOAD & PRINT

1. **Download**: Save this checklist as a PDF or image file to your computer.
2. **Print**: Print out a hard copy to use while researching or comparing plumbing software options.

PLEASE NOTE: This interactive checklist will help you narrow down your choices and find the perfect plumbing software for your business. Use the checkboxes to mark features that are essential for your needs and rate the importance of each feature.

CORE FEATURES

SERVICE FEATURE	ESSENTIAL?	YOUR RATING	YOUR NOTES
SCHEDULING & DISPATCHING	☐	☐	_____
CUSTOMER MANAGEMENT (CRM)	☐	☐	_____
INVOICING & PAYMENTS	☐	☐	_____
INVENTORY MANAGEMENT	☐	☐	_____
REPORTING & ANALYTICS	☐	☐	_____

ADDITIONAL CONSIDERATIONS

SERVICE FEATURE	ESSENTIAL?	YOUR RATING	YOUR NOTES
MOBILE ACCESSIBILITY	☐	☐	_____
INTEGRATIONS	☐	☐	_____
SCALABILITY	☐	☐	_____
CUSTOMER SUPPORT	☐	☐	_____
PRICING	☐	☐	_____
USER INTERFACE (UI)	☐	☐	_____

BONUS FEATURES (NICE TO HAVE)

SERVICE FEATURE	ESSENTIAL?	YOUR RATING	YOUR NOTES
MARKETING TOOLS	☐	☐	_____
EMPLOYEE MANAGEMENT	☐	☐	_____
EQUIPMENT TRACKING	☐	☐	_____
ESTIMATE GENERATION	☐	☐	_____

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PRO TIP: Use this checklist in conjunction with software demos to get a comprehensive view of your options.