

Plumbing Scheduling Software Selection Checklist

Vendor-neutral prompts for comparing scheduling and dispatch tools.

Business: _____
Vendor / plan: _____
Demo / quote date: _____
Evaluated by: _____

HOW TO USE

Use the same questions and job scenarios for each provider. Ask for a live demonstration, written pricing, and the current agreement. Record the answer, its source, and the date. Mark items to follow up when details are not clear.

01. SCHEDULING AND DISPATCH

- ☐ Can I see each technician's day and week in one dispatch view?
- ☐ Can jobs be assigned by skill, license, service area, availability, and on-call rotation?
- ☐ How does the schedule handle emergency calls, cancellations, callbacks, and jobs that run long?
- ☐ Can I change an appointment window and notify both the customer and assigned technician?
- ☐ Can I see drive time and route order while honoring promised windows and parts pickup?
- ☐ How are recurring maintenance visits and multi-day jobs scheduled?

02. MOBILE AND FIELD USE

- ☐ Can a technician see today's jobs, addresses, customer notes, equipment history, and attachments on a phone?
- ☐ What can be viewed or recorded when cell service is poor, and how does it sync afterward?
- ☐ Can technicians record arrival, job notes, labor, parts, photos, signatures, and follow-up needs?
- ☐ Can a technician create or revise an estimate in the field and capture approval before extra work?
- ☐ How does a technician contact dispatch and receive schedule changes during a job?
- ☐ Can our crew test the app on the devices and operating systems we already use?

03. BUSINESS AND CREW FIT

- ☐ How would our mix of residential service, commercial work, installation, maintenance, and callbacks be handled?
- ☐ Can an owner manage scheduling without paying for seats or roles the business does not use?
- ☐ Can it represent our current technicians, crews, service areas, and branches as the team changes?
- ☐ What is needed to bring over customer records, equipment history, open jobs, and price lists?
- ☐ Which of our existing tools connect, and what information moves in each direction?
- ☐ Who trains the dispatcher and technicians, how long does training take, and what support is included?

04. PRICING TRANSPARENCY AND TOTAL COSTS

- ☐ What is the exact recurring price for the plan, team size, and billing term we would choose?
- ☐ Which capabilities or seats add cost, including dispatch, mobile access, and optional modules?
- ☐ What one-time costs apply for setup, onboarding, migration, hardware, and integrations?
- ☐ Are there per-user, per-location, per-job, usage, message, or transaction charges?
- ☐ Which taxes or surcharges apply, and when can recurring prices or usage charges change?
- ☐ How long is this written quote valid, and what amount would be billed after any stated introductory period?

05. CONTRACT TERMS AND DATA

- ☐ What are the initial term, renewal period, and cancellation notice deadline?
- ☐ Can fees apply for cancellation, early termination, downgrading, pausing, or reducing seats?
- ☐ If we leave, how do we export customer records, photos, attachments, and job history, and for how long?
- ☐ Where can we review the written terms for data use, privacy, security, backups, and breach notices?
- ☐ What support hours, response targets, service commitments, and outage remedies are written into the agreement?
- ☐ Will each demo promise, integration, price, and exception appear in the signed order or agreement?

SAME DEMO SCENARIOS

- ☐ An urgent call arrives during a full day. Show how dispatch finds an available technician, adjusts the schedule, and communicates the change.
- ☐ A technician becomes unavailable. Show how the assigned work is reassigned and how affected customers and crew members are informed.
- ☐ A site visit needs a return appointment after parts are identified. Show how the job notes, estimate approval, parts, and follow-up visit are recorded.

FOLLOW-UP NOTES

Open question: _____

Answer / source / date: _____

Open question: _____

Answer / source / date: _____