Contractor Software Demo Scorecard

Compare up to three exact plans using the same job and requirements.

Trade / team size	Evaluation date	Country
		Choose

A - Application and exact plan	B - Application and exact plan	C - Application and exact plan

Priority: M = must-have; P = preferred; X = not needed. Result: Ask = unverified; Yes = confirmed on this plan; Part = partial or workaround; No = not supported.

1 Test the workflow, not just the feature list

Requirement and demonstration	Priority	A	B	C
One job, end to end Enquiry, estimate, schedule, change and final invoice.	M	Ask	Ask	Ask
People and approvals Office / field permissions, approval steps and seat limits.	M	Ask	Ask	Ask
Plan scope and total cost Required add-ons, usage limits and full renewal price.	M	Ask	Ask	Ask
Accounting and payments Exact connector, sync direction, records and fees.	M	Ask	Ask	Ask
Field work and weak signal Actual mobile tasks; what fails or waits when offline?	M	Ask	Ask	Ask
Migration and export Import a sample; export customers, jobs and invoices.	M	Ask	Ask	Ask
Onboarding and support Training, migration help, channels and extra charges.	M	Ask	Ask	Ask
Renewal and leaving Commitment, notice period and data access after exit.	M	Ask	Ask	Ask

Your most important must-have and why it matters

Do not trade an unresolved must-have for more optional features. A sales promise or roadmap is not a demonstrated capability. Confirm partial results, costs and conditions in writing.

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Keep evidence, check the full cost and decide what still needs verification.

Use the same A / B / C plans as page 1. Use USD or CAD explicitly; do not compare mixed currencies or different team sizes as if they were equivalent.

2 Capture the quoted plan and cost conditions

Quoted detail	Application A	Application B	Application C
Country / currency			
Included people / locations			
Price / billing term			
Required add-ons / usage			
One-time setup / migration			
Payment / transaction fees			
Renewal price / commitment			
Cancel notice / export limits			

3 Evidence and unresolved must-haves

Application A

Demo date / evidence reference

Blockers / written follow-up needed

Application B

Demo date / evidence reference

Blockers / written follow-up needed

Application C

Demo date / evidence reference

Blockers / written follow-up needed

Next step and reason

Your observations, not a vendor rating or guarantee. Keep customer and sensitive business data out of examples. Fill and save a local copy in a PDF reader, or print it; browser PDF support varies. For more detailed notes: contractorsoftwarefinder.com/software-demo-checklist/