Souck

GUIDE · BUSINESS SYSTEMS

CHOOSING SOFTWARE: A CHECKLIST

What to look for in quoting, invoicing, scheduling and field service tools, explained in plain language.

souckinc.com

October 2026

The right software saves hours every week. The wrong software adds another login nobody uses. Use this checklist before you sign up for quoting, invoicing, scheduling or field service tools.

START WITH THE PROBLEM

Write down the task that costs you the most time or the most money today: quotes taking too long, invoices going out late, crews arriving without the right information. Choose software that fixes that problem first.

QUESTIONS TO ASK ANY TOOL

- [ ] Does it work well on a phone, for people in the field?
- [ ] Can it send quotes and invoices with your branding?
- [ ] Does it accept online payments?
- [ ] Does it connect to your accounting software?
- [ ] Does it connect to your CRM or replace it?
- [ ] Can you import your existing customer list?
- [ ] Can each team member have their own login and permissions?
- [ ] Is support available during your working hours, in Canada?
- [ ] Where is your data stored, and can you export it if you leave?
- [ ] What is the full monthly cost for your team size, including add-ons?

TRY BEFORE YOU COMMIT

Use the free trial with a real job from start to finish: create the quote, schedule the visit, complete the job and send the invoice. Ask the person who will use it most to do the trial with you.

PLAN THE SWITCH

- Choose a quiet week to start.
- Import customers and price lists before go-live.
- Train the team in one short session, then check in after a week.
- Keep the old system read-only for a month.

REVIEW AFTER 90 DAYS

Is the original problem solved? Are people using it every day? If not, find out why before adding another tool.

> NEED A HAND?
>
> Souck helps trades and service businesses with websites, search, advertising, branding and business systems. Book a free conversation at souckinc.com/book or call 1-888-218-9374.