

Field Management Software Questions You Probably Didn't Think to Ask

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Most contractors compare field management software based on features they can see in a demo like scheduling screens, invoices, pricebooks, and mobile apps. But the decisions that matter most usually show up months or years after implementation, when reporting doesn't match reality, workflows stop fitting the business, or switching systems becomes harder than expected.

This checklist highlights the operational, financial, and scalability questions owners often don't realize to ask before signing. It's designed to help you evaluate whether a platform will support how your company actually runs, not just how it looks in a presentation.

This is not an all-inclusive list. Every company's needs are different depending on whether you focus on residential service, commercial work, installs, maintenance agreements, or construction. Use this as a starting point for deeper evaluation before committing to a system that may shape your operations for years.

Data Ownership & Exit Risk

- If we leave the platform, can we export *everything*: customers, job history, equipment records, serial numbers, notes, and photos?
- Is the export structured and usable, or just raw files?
- Who legally owns our customer data, us or the software company, and how private is our data?
- What happens to our data if the company is acquired or shuts down?
- Can we export our pricebook and custom workflows?

Reporting Reality (Margins vs Averages)

- Does the dashboard show real technician labor cost or averaged labor assumptions?
- How does the system handle different pay rates between technicians?

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- Does job profitability reflect actual material cost timing or estimates?
- Can reports separate service vs install vs maintenance vs construction revenue?
- Does it report in accrual or cash basis?
- How can we use it to manage cash flow?

Payroll & Time Tracking

- Does technician time flow directly into payroll without duplicate entry?
- How are overtime rules handled?
- Can drive time be tracked separately from billable time?
- Will techs need to enter time twice anywhere in the process?
- Does time tracking actually connect to margin reporting?

Inventory Accuracy

- Does inventory rely on technicians manually entering purchases later?
- Can materials be used but never billed if receipts aren't captured?
- Does the system track truck stock separately from warehouse stock?
- What costing method is used: FIFO, LIFO, or average? Or is it hand keyed each time?
- Will inventory costs match what our accounting system shows?
- Can inventory go negative?

Install vs Service Workflow Fit

- Can the system handle install jobs as well as service calls?
- Can projects span multiple days? Track multiple techs on a job with the same app?
- Can change orders be tracked cleanly?

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- Can install labor be separated from service labor in reports?
- Will we need another system later for construction-style jobs?

Commercial/Construction Customer Requirements

- Can we handle progress billing and retainage?
- Can customers require purchase orders before work begins?
- Can pricing vary by customer contract?
- Can multiple locations exist under one commercial account?
- Can equipment be tracked by building and asset?

Pricebook Scalability

- Can the pricebook support multiple labor tiers?
- Can different customer classes have different pricing?
- Can commercial and residential pricing coexist?
- How hard is it to rebuild the pricebook later if needed?
- Can manufacturer catalogs be imported or maintained easily?

Dispatch Efficiency

- Does routing optimize technician geography automatically?
- Can we define service-area boundaries?
- Can dispatch see drive-time impact before scheduling?
- Can recurring maintenance be scheduled efficiently across zones?
- Does dispatch performance degrade as team size grows?

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Mobile App Reality in the Field

- Does the app work offline in basements or mechanical rooms?
- Can techs complete the full job without calling the office?
- Can photos, signatures, notes, and payments be collected offline?
- How often does the app require syncing to avoid data loss?
- What do real technicians say about using it daily?

Implementation Risk

- How long does implementation actually take for companies our size?
- Who configures workflows - us or the vendor?
- Can we adjust workflows later ourselves?
- What support exists after onboarding ends?

Integration & Accounting Alignment

- Is the accounting integration truly two-way or one-directional?
- Will our CPA be able to pull usable reports easily?
- Does inventory sync correctly with accounting timing?
- Does job costing match accounting job costing?
- What breaks if the integration disconnects?
- Where does the AP and AR work get handled? In the system or in the accounting software?
- How much is office user access as we grow?
- Can you allow different office team members different access?

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Growth & Future Fit

- At what company size do most contractors outgrow this platform?
- Does per-technician pricing still make sense at 5–10 trucks?
- Are there any other add on costs as we grow?
- Can departments be separated later (service vs install vs construction)?
- Will reporting still work once we add office staff roles?
- Does the system support where we're going, not just where we are today?

Contracts & Pricing Surprises

- Does the contract auto-renew?
- What's the maximum price it could renew at?
- What is the cancellation window?
- Are support tiers included or extra later?
- Which "core" features are actually add-ons?
- What happens if our technician or office user count drops?

The Question Almost Nobody Asks (But Should)

- If our company doubled next year, would this still be the system we'd choose today?

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