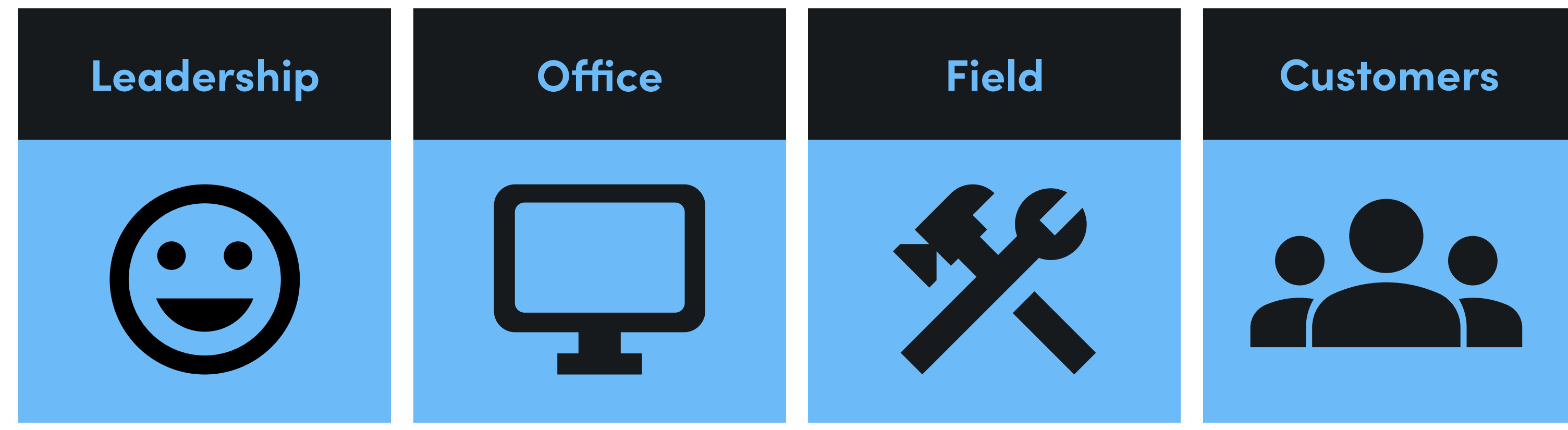


Making sure the next commercial contractor software you buy is right for your company doesn't have to be overwhelming or time-consuming. To help you evaluate the right move, we've put together a list of key capabilities to consider that set you up for success and scale.

Categories



For leadership

Capability	Description	ServiceTitan	other vendor	other vendor
AI & machine learning	AI & Machine Learning that delivers actionable insights to help automate repetitive and simple tasks, predict outcomes, lower costs, and stay competitive in a world run by data.			
APIs	Open Application Program Interface (API) functionality allows you to build a connection between your commercial platform and other software, such as specialized accounting applications. A majority, if not all, applications can be supported, which allows you to keep data in sync without double entry.			
Cloud-based	Cloud-based solutions are the standard of innovation, allowing new features, enhancements, and fixes to be released throughout the year through the internet. Cloud-based technology allows you to update every device remotely, and scales as your business continues to grow. And with a separate environment for testing, you can test new features hands-on with your actual data before each release.			
Consolidation	A robust suite of capabilities in a single software increases efficiency, saves time and eliminates errors introduced by double entry, and improves the quality of your data when compared to managing multiple systems and softwares to manage individual tasks.			
Integrations	A self-service partner marketplace lets you browse and quickly set up pre-built integrations with your existing partners, including accounting platforms such as QuickBooks and Sage Intacct, many of the biggest parts and equipment vendors, and add-on efficiency boosters.			
Multi-tenant management	Your software should allow seamless management across multiple locations under one account on one platform, providing a holistic view of performance across the company. That functionality allows standardized procedures, configurations, and permissions—and the addition of more locations—managed within a single platform.			
Reliability	Complete confidence in an essential, mission-critical platform's ability to keep your business running is essential. The platform should have a monthly uptime of 99.9% and a dedicated, public page that allows you to view real-time performance.			
Security	Your data must be safe and secure, with SaaS best practices followed and the platform's data security being recognized as being in compliance with the strictest standards in the industry.			
Community	A dedicated, supportive user community to allow you and your peers to share best practices, ask questions, leave product feedback, and more.			
Customer success	A dedicated success team helps you fully utilize the software to grow your business the way you expect. The success team provides ongoing best practices and strategy discussions to propel your business.			
Customer support	With 24/7 support, any issues or questions that arise can be addressed quickly, including in-app help to chat with a real person, live and when you need it.			
Onboarding	A dedicated specialist guides your implementation process, including data migration and support, to ensure you are set up for success before officially going live.			
Training	Full access to all training materials, including documentation and video content, provides detailed information on every aspect of the system. In addition, 1-on-1 or group workshops let you dive deeper into specific topics.			

For the office

Capability	Description	ServiceTitan	other vendor	other vendor
Accounting	A real-time transaction hub provides a single access point to view and manage all the money coming in, going out, and owed to your business. You can easily batch and export transactions to keep your financial data in sync with your accounting system.			
Customer-specific pricing	Seamlessly manage your customers' individualized rates with easy customization of your pricebook tailored to each customer. Build rules that dynamically update pricing when material or labor costs are changed, automating those processes.			
Estimating	Quickly create and send professional quotes, with the ability to create estimates from templates, spreadsheets, or manual input. Get estimates out the door faster, from the office or the field. Standardized processes help make estimates more consistent and protect profitability.			
Inventory management	Serialized inventory and bin tracking at every warehouse and in every truck that automatically creates replenishment orders based on min/max values you assign.			
Job costing	Gain real-time insight into profits, costs, and progress. Easily understand profitability with a breakdown of your budget, actuals, variance, and % of budget used for all items, at the job and project level. Get a breakdown of these costs at the contract level to better understand your profits for each account, allowing real-time adjustment and allocation of resources better for maximum profits.			
Procure-to-pay	An integrated Procure-to-Pay process that provides access to real-time product information and contractor-specific pricing with the ability to electronically send and receive purchase orders and invoices, accounts payable reconciliation, and make simple electronic payments without ever leaving the platform.			
Payroll	Communicate and customize gross pay with automated payroll capabilities. Easily track technician hours (both job and paid non-job), customize performance pay to award commissions and bonuses, and manage office time-sheets for hourly office employees.			
Progress billing	Seamlessly generate professional payment applications to progressively bill and collect accurate, on-time payments for work completed—all while following AIA billing standards.			
Project management	Accurately track project progress and profits in real-time to keep every project on budget and on schedule. Tools to progressively bill, capture change orders, automate the procurement process, and track tasks are all in one place, enabling effective management.			
Reporting	Data captured throughout the system is displayed as robust analytics in powerful pre-built and customizable reports and dashboards, providing insight into every aspect of your business, from profitability to job costing to WIP.			
Scheduling & dispatching	Automate workflows with intelligent scheduling that recommends technicians to jobs based on their skills, shifts, zones, and non-job events. A visually intuitive dispatch board provides a complete picture of who's working where—today and in the future—while optimizing schedule adjustments.			
Service agreements	Create and manage your service agreements with a simple process that keeps your recurring services operating on autopilot. Automate scheduling, understand equipment history, and keep customers up to date on upcoming visits, and get a holistic view of every contract.			

For technicians

Capability	Description	ServiceTitan	other vendor	other vendor
Customer history	Give technicians the knowledge needed to get every job done right with details at their fingertips on recurring services, existing equipment, previous invoices, photos, videos, notes, projects, and prior forms completed.			
Equipment history	Keep your technicians prepared and productive by knowing the ins and outs of equipment at a location with a view into completed installs and service for every item.			
Forms	Optimize workflows with digital forms that use conditional logic to automatically trigger actions such as creating a purchase order or sending an invoice. Technicians only see relevant fields for that job, so they spend less time on their devices and more time providing exceptional service.			
Labor tracking	Track labor costs in real-time with technician and crew GPS tracking, clock in and out, and breaks, so you accurately capture job costs and streamline payroll.			
Mobile	An intuitive mobile app keeps the field, office, customers, and warehouses in sync in real-time—regardless if they're in a metropolitan or remote area. From viewing job information and completing tasks such as logging notes, taking photos, or starting a PO, your technicians can maximize productivity on every job.			
Purchasing	Streamline the PO process and keep jobs moving with PO creation and management, even from the technician's mobile device.			
Real-time data sync	Real-time data syncing between the field, office, customers, and warehouses powers your business to operate more efficiently and removes manual data entry.			
Truck replenishment	Keep track of materials and quickly restock your truck inventory at the time of need by sending and tracking POs from your device.			

For customers

Capability	Description	ServiceTitan	other vendor	other vendor
CRM	Get a single source of truth for all customer data, including information that spans multiple service locations. From recurring services, to invoices and payments, to open jobs and tasks, every account detail is on one page, allowing quick answers to customer questions, showing when equipment was last serviced, and more.			
Customer communication	A personalized customer portal ensures accurate on-time payments, allows customers to review and pay outstanding invoices, enables self-scheduling to request new services or see upcoming appointments, and provides a complete history of services performed, without having to make a phone call.			
Notifications	Keep customers informed when technicians are on their way and arriving at appointments with real-time notifications.			

Evaluation scores

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Getting Started

- ✓ Review each section
- ✓ Rate the vendors you're evaluating
- ✓ Be educated and confident in your decision

Rating

- 2 Exceeds capability needs
- 1 Meets capability needs
- 0 Doesn't offer capability