Detailing Business Software Evaluation Checklist

24 evidence questions. Six requirement groups. Four fictional operational exercises. Use this blank record alongside the guide; it is not an independent vendor ranking or a completed assessment.

Version 1 - November 1, 2026

Product / tested version: _____

Review date: _____

Business use: _____

Decision owner / role: _____

How to use the record

Choose essential requirements before the demonstration. Retain the written evidence or observe the behavior in the tested version. Record the state, evidence reference and next action. A missing essential requirement cannot be offset by attractive unrelated features.

Evidence states: not reviewed; vendor description only; written evidence reviewed; demonstrated in tested version; not met; outside stated use. A state is a recording aid, not a certification.

Use fictional examples and an approved test environment. Do not charge a real customer or include personal, payment or confidential business information in a public review.

Read the full guide: detailrcorp.com/guides/detailing-software-evaluation/

Requirement group 1 of 6

Services that describe the actual work

A bookable package needs a clear scope, price basis and time allowance.

ID / essential?	Requirement and evidence to retain	State / reference
01 [ ]	Can you define a package by vehicle and included work? Build a fictional sedan service with named inclusions, exclusions, price basis and expected duration. Check what the customer sees before confirming. Need: observed demonstration	State: _____ Reference / next action: _____
02 [ ]	Does an add-on change the appointment duration? Add a 30-minute fictional extra to a 90-minute package. Confirm both the displayed total and the reserved time change; inspect an appointment immediately after it. Need: observed demonstration	State: _____ Reference / next action: _____
03 [ ]	Can condition-dependent work require assessment? Show how a heavy-soiling, stain or specialist task is described and approved without promising a result or silently expanding a fixed package. Need: observed demonstration	State: _____ Reference / next action: _____
04 [ ]	Are memberships, packages and subscriptions distinguishable? Review the actual charge, included visits or credits, renewal, unused-service and cancellation terms. Confirm the customer can tell a recurring appointment from a recurring charge. Need: reviewed written evidence	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Requirement group 2 of 6

Capacity, employees and repeat bookings

An empty slot only matters if the people, equipment and location can support it.

ID / essential?	Requirement and evidence to retain	State / reference
05 [ ]	Does the schedule respect employee availability? Create two fictional employees with different hours and skills. Check who can receive a job, whether simultaneous appointments are possible, and what happens when one person is unavailable. Need: observed demonstration	State: _____ Reference / next action: _____
06 [ ]	Can travel and turnaround time be protected? Reserve time for the actual mobile route or shop reset, not just the cleaning task. Test whether a neighboring booking can consume that time. Need: observed demonstration	State: _____ Reference / next action: _____
07 [ ]	What happens when a repeat visit meets an exception? Create a repeat series, then change one visit for a closure or absence. Observe which later visits, charges and messages change. Retain the stated rule. Need: observed demonstration	State: _____ Reference / next action: _____
08 [ ]	Can you identify the constrained resource? Check employee, bay, vehicle or equipment limits relevant to your operation. A multi-employee calendar alone does not prove a shared bay or machine is protected. Need: observed demonstration	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Requirement group 3 of 6

The customer decision and booking

Review the complete experience from the customer's side, including exceptions.

ID / essential?	Requirement and evidence to retain	State / reference
09 [ ]	Is the complete customer total visible before confirmation? Record the service amount, selected extras and disclosed customer/platform charges for a fictional booking. Check taxes, travel or condition charges where applicable. Need: observed demonstration	State: _____ Reference / next action: _____
10 [ ]	Can mobile and shop instructions be made unambiguous? Check the actual service address, access, work-space requirements, arrival directions and who supplies any required utilities. Do not rely on the business's mailing address. Need: observed demonstration	State: _____ Reference / next action: _____
11 [ ]	Are rescheduling and cancellation expectations clear? Read the current written rules and test a fictional permitted change. Identify cutoffs, any charge, who handles an exception and the customer support route. Need: reviewed written evidence	State: _____ Reference / next action: _____
12 [ ]	Can a new customer understand the service without calling? Ask a person unfamiliar with the setup to explain the selected work, location, duration, total and next step. Record misunderstandings, not just whether the screen looked attractive. Need: observed demonstration	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Requirement group 4 of 6

Messages and the work record

The appointment and its conversation should remain usable through a handoff.

ID / essential?	Requirement and evidence to retain	State / reference
13 [ ]	Can the conversation be found from the relevant job? Send a fictional vehicle-condition question and locate the reply from the appointment and customer context. Check notification settings and responsibility for answering. Need: observed demonstration	State: _____ Reference / next action: _____
14 [ ]	Does a team member receive the information they need? Assign or reassign a fictional job. Check vehicle, service, access notes and customer instructions. Review what that role can see and change. Need: observed demonstration	State: _____ Reference / next action: _____
15 [ ]	Is job completion a defined event? Observe how completion is recorded, what the customer sees and which payment or review steps follow. A status button is not evidence that a quality dispute has been resolved. Need: observed demonstration	State: _____ Reference / next action: _____
16 [ ]	Are photos and customer information handled under clear rules? Review the supported media, consent, access, retention and deletion arrangements. Do not assume a work photo may be reused for public marketing. Need: reviewed written evidence	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Requirement group 5 of 6

Charges, payouts and service exceptions

Separate the software's commercial model from payment processing and service obligations.

ID / essential?	Requirement and evidence to retain	State / reference
17 [ ]	Can every charge be assigned to its payer? Request current written subscription, commission, usage, processing and customer fee terms. Distinguish a Detailr fee from an unrelated operating cost or a payment-provider charge. Need: reviewed written evidence	State: _____ Reference / next action: _____
18 [ ]	Are payment timing and payout timing explained separately? Review authorization, collection, job completion, release and bank arrival under current terms. A completion-dependent release does not guarantee instant bank funds or a particular service result. Need: reviewed written evidence	State: _____ Reference / next action: _____
19 [ ]	Can a service concern be escalated with the right context? Use a fictional incomplete-service case. Identify the provider contact, platform support route, relevant record and current dispute/refund rules without promising a refund. Need: reviewed written evidence	State: _____ Reference / next action: _____
20 [ ]	Can you reconcile one job to the money record? Follow a fictional service, approved extra and any applicable adjustment through the supported payment/reporting workflow. Identify what must be exported or reconciled elsewhere. Need: observed demonstration	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Requirement group 6 of 6

Operating cost, adoption and exit

Choose a workflow you can operate today and leave with a usable record later.

ID / essential?	Requirement and evidence to retain	State / reference
21 [ ]	Have you recorded first-year and ongoing costs? Separate setup, recurring subscriptions, variable fees and your own staff time. Include any retained accounting, communications or other tools rather than assuming every outside service disappears. Need: reviewed written evidence	State: _____ Reference / next action: _____
22 [ ]	Can the team complete a task without the presenter? Have a staff member configure or run a fictional booking without the salesperson directing each step. Record training and support actually needed. Need: observed demonstration	State: _____ Reference / next action: _____
23 [ ]	Can you explain export, account access and leaving? Read the current account, role, export and termination arrangements. Inspect the actual export format and identify information that must be retained elsewhere. Need: reviewed written evidence	State: _____ Reference / next action: _____
24 [ ]	Does the decision name unresolved gaps and an owner? Choose proceed, narrow, retest or stop for the stated use. Record the tested version, evidence accepted, open questions, responsible role and what would change the decision. Need: reviewed written evidence	State: _____ Reference / next action: _____

Review notes / unresolved gap and owner

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Four fictional operating exercises

1. An add-on meets the next appointment

A fictional 90-minute service gains a 30-minute pet-hair assessment/cleaning extra. Another customer has the next slot.

Observe: The test preserves an explainable duration and a workable handoff. A price change alone is insufficient.

2. Two employees, one resource

Two fictional team members can work at the same time, but the business has one usable bay or one specialist machine.

Observe: Team calendars do not automatically establish equipment or bay capacity. Make the remaining operating rule explicit.

3. A repeating visit needs one exception

A fictional customer has a repeat maintenance series. A closure affects one date.

Observe: The team can explain the change, which visits remain and whether a charge is affected.

4. A job is marked complete but a concern remains

A fictional customer reports an unfinished area after the job status changes.

Observe: The review separates job status, payment release, support handling and the eventual service outcome.

Keep a short decision record

Intended use; tested version; evidence accepted; essential gaps; responsible role; proceed, narrow, retest or stop; next review date. Record what would change the conclusion.

Method and sources

Original worksheet and scenarios by Detailr Corp. General one-time/monthly cost categories are informed by the U.S. Small Business Administration, Plan your business: sba.gov/counseling/plan-your-business/. No vendor score, universal savings figure or product outcome study is supplied. Detailr Corp. has a commercial interest in this category.