

Compare the same practice.

Use one sheet per vendor. Bring the same team, services and membership to each demo.

Vendor / plan: _____ Date: _____

Locations: _____ Bookable providers: _____ Other users: _____

1 Name the five things this system must do

1. _____
2. _____
3. _____
4. _____
5. _____

2 Compare startup cash and ongoing spending

Base subscription and paid seats	Monthly \$	_____
Clinical, messaging, marketing and storage additions	Monthly \$	_____
Other subscriptions we must keep	Monthly \$	_____
Processing estimate for our payment mix	Monthly \$	_____
TOTAL recurring cost	Monthly \$	_____
Setup, migration, hardware and paid training	Once \$	_____
Overlap with old system / archive access	Once \$	_____

Total due before launch: \$ _____ Renewal price / date: _____

Term and cancellation notice: _____

Quote exclusions / unresolved costs: _____

Make the software prove the fit.

Mark P = pass, W = needs work, F = fails, U = unverified. Record what you actually saw.

3 Run the workflow and membership tests

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Booking, deposit, reschedule and intake

Mobile flow; correct provider, room and deposit.

☐

Treatment record, photos and review

Finished record; signature, correction and retrieval.

☐

Inventory and checkout

Product use, retail stock, discounts and a clear receipt.

☐

Credit or included-treatment membership

Three payments, partial redemption and remaining benefits.

☐

Failed renewal, cancellation and refund

Billing stops correctly; paid balances reconcile.

☐

Reporting, permissions and export

Open sample records and balance exports yourself.

4 Decide what happens next

Evidence: documentation / vendor demo / our sandbox test. Date: _____

Decision: shortlist / second demo / reject. Reason: _____

Unresolved item and person responsible: _____

Confirm migration scope, BAA where applicable, contract and payment terms before signing.
