DATA DRIVEN REVIEWS

Accounting Software Evaluation Worksheet

A companion worksheet to "How to Choose the Right Accounting Software for Your Small Business." Fill this out as you work through the decision — it turns the framework into something you can act on, compare, and revisit.

1. Map Your Needs — Now and in 12–24 Months

Write down where the business realistically stands today, and where it's likely headed. This should shape your shortlist more than any single feature comparison.

	Today	In 12–24 Months
Team size		
Revenue range		
Physical inventory?		
Project-based billing?		
Payroll needed?		
Payment processing needed?		
Multi-currency needed?		
Other:		
Other:		
Other:		
Other:		
Other:		

2. Must-Have vs. Nice-to-Have Features

Sort real features — the same categories covered in the DDR Comparison Matrix™ — into what the business truly needs versus what would just be nice. This is what actually narrows a field of five-plus products down to a real shortlist.

Feature	Must-Have	Nice-to-Have
Automated bank feeds & reconciliation		
Multi-currency support		
Inventory tracking		
Job costing / project profitability tracking		
Recurring invoices & client portal		
Mileage tracking		
Native payroll		

AI-powered categorization / anomaly detection		
Native integrations with tools already in use		
Multi-user roles & permissions		
Mobile app		
Other:		
Other:		
Other:		
Other:		
Other:		

3. Ecosystem Fit

If any of these are realistically on the table in the next 12–24 months, check whether a platform offers them natively — a first-party option removes a second vendor relationship, login, and data-sync dependency.

- ☐ Payroll
- ☐ Payment processing
- ☐ Working capital / lending
- ☐ Other:
- ☐ Other:
- ☐ Other:
- ☐ Other:
- ☐ Other:

4. Narrow Your Shortlist

With needs, must-haves, and ecosystem fit mapped out, use Data Driven Reviews' own tools to turn that list into real candidates before spending time on pricing or trials:

Check must-have features against all five products at once using the DDR Comparison Matrix™.

Use the "Find Your Fit" tool on the SMB Accounting main page to match needs directly to a recommendation.

- ☐ Narrowed to 2–3 realistic finalists before moving on to price and trials

5. Price-to-Value Check

Once you have a real shortlist, weigh price against what it's actually worth to the business — not before.

What does one hour of billable time (or one avoided bookkeeping error) cost the business?

Which time-saving features matter most on your shortlist? (auto bank reconciliation, recurring invoicing, AI expense categorization, etc.)

- ☐ I've compared plans by what they cost relative to a single client invoice, not in isolation.

6. Free Plan & Discount Reality Check

Free tiers and promotional discounts are standard across this category — don't let one sway the decision on its own. Check what's true after the offer ends, for each shortlisted option.

- ☐ I know the exact price after any introductory discount ends.
- ☐ I know whether the free/discounted tier has a revenue, user, or invoice-volume cap — and whether the business is likely to exceed it.
- ☐ I'm evaluating each option on long-term fit, not just the lowest number on the pricing page.

7. Trial Test Checklist

Feature lists can't tell you how a product feels to use every day. Most people won't connect a live bank account just to evaluate software — these tests don't require that level of commitment:

- ☐ Explored built-in sample/demo company data, if available
- ☐ Created one manual invoice and one manual expense entry
- ☐ Imported a small CSV of sample transactions (instead of a live bank feed)
- ☐ Pulled and customized at least one report
- ☐ Walked through the initial setup wizard (chart of accounts, tax settings, adding a user)
- ☐ Checked the vendor's help center for substantive (not generic) answers
- ☐ Tested the support chatbot, if there is one, with a real question
- ☐ Contacted support directly (call or message) with a real question and timed the response
- ☐ If time allows: browsed the integrations marketplace for tools already in use

8. Side-by-Side Comparison

Once you have real trial data on your top options, compare them here.

	Option A	Option B	Option C
Product name			
Monthly price (post-discount)			
Covers today's needs?			

Covers 12–24 month needs?			
Time-saving features present			
First-party ecosystem fit			
Trial: invoice/expense entry test			
Trial: sample data or CSV import test			
Trial: reporting test			
Support test result			
Other:			
Other:			
Other:			
Other:			
Other:			
Overall impression			