



CHECKLIST · FIELD SERVICE

Mobile Time Capture Rollout Checklist

A practical rollout checklist for moving field time entry from paper and memory to phones, with the adoption steps that decide whether crews actually use it.

FIELD SERVICE · CHECKLIST

Every hour between work happening and work being recorded costs accuracy. Time remembered at the end of a week is time rounded, guessed, and occasionally invented.

Mobile capture closes that gap with the phone already in the tech's pocket. The technology is the easy part. This checklist is mostly about the rollout, because that is where these projects succeed or quietly die.

Before anyone downloads anything

- ☐ Jobs and cost codes current in the system, so time lands somewhere real
- ☐ Crew assignments accurate: people mapped to the jobs they actually work
- ☐ Approval flow decided: who reviews, how often, on what screen
- ☐ Payroll mapping tested end to end with one sample week
- ☐ Offline behaviour verified for sites with weak signal

The pilot

- ☐ One crew, one supervisor who wants it to work
- ☐ Two-week window with paper running in parallel
- ☐ Entry time measured: if it takes longer than paper, fix that first
- ☐ Discrepancies between paper and mobile reviewed with the crew, not at them
- ☐ One visible win shared: a payroll question answered in seconds, not a search

Rollout rules that survive contact with the field

- ☐ Time entered at the site, at completion, not at day end
- ☐ No duplicate entry anywhere: mobile is the record, full stop
- ☐ Supervisors approve on a rhythm, daily or per shift
- ☐ Exceptions handled in the open: missed entries corrected by name, same week
- ☐ Office stops accepting paper on an announced date, and means it

What you get on the other side

- ☐ Job costs current within a day, not a week
- ☐ Payroll from approved entries with no Sunday-night reconstruction
- ☐ Billable hours captured at the site instead of recalled at the desk
- ☐ A WIP and margin picture the estimator can actually learn from



Questions about any of this?

Summit Business Systems has been implementing ERP for Ontario businesses since 1991. We are an Acumatica Gold-Certified Partner based in Barrie, working with construction, field service, distribution, and professional services companies across the province. If you want a second opinion on anything in this checklist, we give straight answers.

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