



A Buyer's Guide to Lien Rights Management Software

Find the right software to manage payment paperwork and lien rights requirements for your growing construction company.



What is lien rights management software?

Lien rights management software streamlines the process of creating and sending notices, waivers, and other important payment documents while ensuring paperwork contains accurate information and is sent to the right parties within the required deadlines.

Managing payment paperwork and lien rights documents such as preliminary notices and lien waivers can be complicated and time consuming, which is where lien rights management software becomes a necessity.

Thousands of construction companies across the country use lien rights management software to save time spent on payment paperwork and to protect millions of dollars in accounts receivable.

If you're considering lien rights management software as a solution for your business, use this guide as a framework for evaluating and comparing various lien rights management systems.





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Chapter 1

The Basics of Lien Rights Management Software



Accessible

Software that is cloud based can be accessed anywhere, anytime when Internet access is available. Flexible accessibility means credit and AR teams can obtain the information they need no matter where they are located (across multiple offices or while working in a remote location).



User friendly

In order to make the paperwork process easier, software must be straightforward and intuitive to use after initial training and onboarding. In addition to ease of use, strong technical support and customer success options should be readily available.



Secure

Cloud-based systems have servers with multiple backup options in various locations, which means high levels of security and stability. Your data and customers' data should be secure at all times. A good lien rights management system will partner with industry-leading platforms to protect user data and sensitive information.



Integrations

If you use other software platforms to manage your accounting, estimating, and budgeting, you'll want to use a lien rights management software that integrates seamlessly with your other solutions in order to easily sync information back and forth.



Automation

True automation involves limiting manual efforts by using predetermined criteria to trigger certain actions without the need for human intervention. In the case of lien rights management software, this can look like having your required notices automatically sent on the appropriate deadline to protect lien rights.

Chapter 2

How to Do a Self Assessment

Are you ready to move forward with lien rights management software? Before making a decision, take time to analyze your current processes, challenges, and goals.

What problems do you need to solve?

Determine what challenges you or your credit and AR teams are currently facing when it comes to lien rights paperwork and accounts receivable. This is a helpful step because you can't determine if a lien rights management software is helpful for you if you don't know what problems you're dealing with in the first place. Prioritize these challenges based on which things need to be resolved immediately and which things can wait.

What goals do you want to achieve?

Think about what you want the future to look like for your business. You don't just want to use software to help you solve urgent problems, but you also want to use it as a tool to launch you in the direction of your goals. By considering your future state, you can ensure the software solution you choose will work not only in the moment, but to support your efforts as your business grows.

What will help your staff be most successful?

Check in with your staff. If you won't be the key end user of the software, you'll want to make sure you understand the needs of those who will be. Getting your team involved early on will also help them make the transition between their current process and their new process once lien rights management software is in the picture.



Chapter 3

Features to Look For in Lien Rights Management Software

At a basic level, a lien rights management software should provide the following features:

● Document management

- Templates for common documents
 - Preliminary notices
 - Monthly notices
 - Lien waivers/releases
- Bulk document sending
- Unlimited document storage
- Expert lien filing services

● Deadline tracking

- Alerts for upcoming lien rights deadlines based on job location
- Auto updates for furnishing dates

● Accounting software integrations

● Customer support

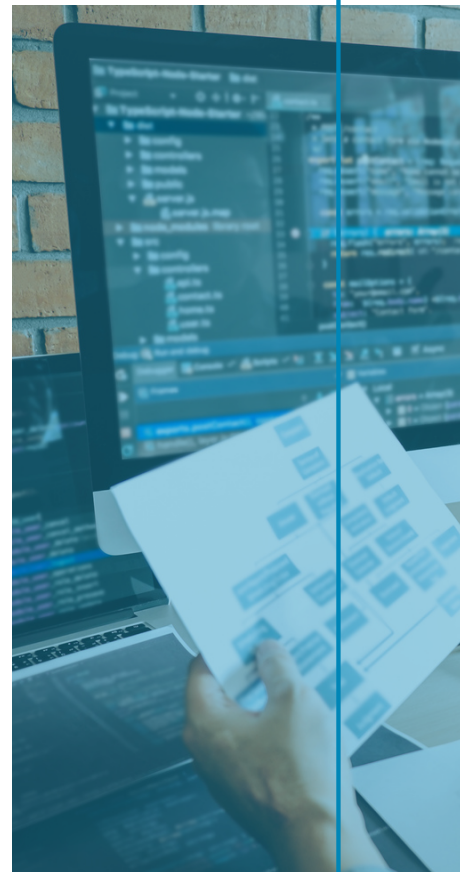
- Technical support via multiple avenues (chat, phone, and email)
- Dedicated account manager or customer success manager
- Training and onboarding

● Automation

- Automated paperwork (creating and sending)
- Pre-approval and drafting
- Customized rules based on preferences

● Administration

- Role-based permissions
- Order/document status tracking
- Workflows for standardization across multi-location structure



Chapter 3

Features to Look For in Lien Rights Management Software (*continued*)

- **Reporting**
 - Easy-to-read dashboards
 - Time or date stamps to track user actions taken in the software
 - Filters and custom views to sort projects, customers, and documents
 - Customized business analysis reports for future risk management
- **Job/Project research**
 - Property information lookup
 - Stakeholder identification
- **Payment insights**
 - Contractor payment history
 - Slow pay and non-payment issue alerts
- **Bonus features**
 - Invoice/materials financing
 - Access to construction legal help
 - Online payment processing
 - Educational resources



Chapter 4

How to Evaluate Lien Rights Management Software

In addition to reviewing your business challenges and gaining an understanding of the basic features of lien rights management software, part of your decision-making process should include evaluating the reputation and development of the software you're considering.

Talk to references and consider customer reviews

The best way to gain an understanding of how lien rights management software can help your business is to talk to other businesses like your own that are currently using software. Testimonials in the form of software reviews, case studies, and verbal references will help you make a better-informed decision. Look for reviews online or ask the software provider directly to provide you with references or case studies.

Ask about software development

Look for software providers who are constantly improving their product with new updates and features based on industry trends. Does the software you're considering take user feedback into account in the software development process? Look for a solution that constantly keeps its users in mind and incorporates customer feedback into the development roadmap. Your software solution should be working to grow as the industry evolves.

Seek out a scalable solution

Make sure that the software platform you're considering can grow with your business, at a minimal cost to you. If you are planning for growth, you don't want to have to replace a software solution because it is unable to shift as you bring on more staff or customers. Scalability includes the ability to be customized, have users added, and connect with other databases as needed.



Chapter 5

The Importance of Onboarding and Support

Transitioning to a new process can cause some stress even for the most organized and tech-savvy teams. To help you or your staff use new lien rights management software, it's important to make sure there are tools in place to support the transition.

Onboarding & Implementation

Before moving forward with lien rights management software, see if the provider offers training or onboarding sessions to help with implementation. A good implementation involves working with a trainer who understands your specific needs and can help individuals or teams make a smooth transition.



Technical Support

When you encounter technical problems in the software or have questions about how to use certain features, it's important that you have the ability to contact technical support quickly and easily. You also want to ensure that your questions or issues can be resolved quickly. Evaluate software that provides multiple avenues for customer support.

Customer Success

A good software provider won't just sell you and leave you. They will be around to provide consistent support and consultations for your success from the moment you've been onboarded and on. Seek out additional customer support from your service provider in the form of a dedicated account manager or customer success team.

Chapter 6

Lien Rights Management Software Shopping Comparison

Buying Criteria	Levelset	Other Candidate
Accounting integrations	✓	
Notifications and alerts	✓	
Document management	✓	
Paperwork automation	✓	
User-focused software development	✓	
Automation rules	✓	
Deadline tracking	✓	
Reporting	✓	
Document templates	✓	
Chat, phone, and email tech support	✓	
Training and onboarding	✓	
Lien filing services	✓	
Dashboards	✓	
Role-based permissions	✓	
Property information lookup	✓	
Stakeholder identification	✓	
Data-driven job alerts	✓	
Automated task suggestions	✓	
AP lien waiver functionality	✓	



About Levelset

Levelset is a leading provider of lien rights management solutions for the growing construction industry. We're solving the construction industry's cash flow problem by making it easy for companies like yours to manage payment paperwork, protect lien rights, and speed up accounts receivable.



Lien rights management software



Materials financing



Job information research



Subscription-based legal help



Free educational resources



Payment problem alerts



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