



## CUC Software — Contractor Essentials

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The Contractor Essentials program from CUC Software is, as its name implies, a specialized business management system for service-oriented contracting companies. Contractor Essentials was initially developed nearly 30 years ago within a contracting firm, and has been tailored to meet the specific needs of professionals in HVAC, electrical, plumbing, mechanical, roofing, general contracting and other industries. The system includes full GL, AR, AP, payroll and invoicing, along with dispatching, equipment and inventory tracking, scheduling and other contractor-specific functions. Reporting options include AIA and Canadian-compliant output. Pricing for up to three users for a system that includes base and key contractor modules costs approximately \$10,600 (includes GL, AP, AR, payroll, job costing, service management, inventory and equipment tracking). CUC also offers leasing options for Contractor Essentials, which for the same three-user package above would cost \$334 per month

### Learning Curve/Ease of Use

Users are guided through most installation and company setup tasks, and a sample company file database is included for demo and training purposes. Contractor Essentials' primary work screen offers access to the program's key modules via a horizontal ribbon-like menu bar, depending upon those selected and installed, while an additional navigation menu on the left allows users to quickly revisit modules and tasks they perform most frequently, as well as Assigned Tasks that are pending action by that user. Each of the module screens includes a menu bar with functions related to that work area, along with easily accessible reporting functions.

Primary job/project management functions are accessible from the Job File Maintenance work area, which offers sortable and filterable customer lists, the ability to add new jobs on the fly and other features. Users can also access records based on customer data, or

enter new jobs from the Service module screen, which includes access to the system's scheduling features, dispatch functions, service call details, job status tracking and drilldown into client histories. Dispatch and scheduling screens offer consistent interface and menu structures, providing excellent access to information, and using intuitive data-entry screens. Likewise, the Customer Maintenance screen provides quick access to summary billing histories, contact information, invoices and customer sites. These work areas are likely the most used by in-office administrative staff, and both offer excellent navigation features and access to reporting, estimate tools and job information.

### Key Modules & Management Tools

In addition to its capable standard accounting and job cost functions (GL, AP, AR, payroll and job costing), Contractor Essentials offers a large selection of add-on modules for specific service industry needs, including project estimating, material estimation, tool management, vehicle maintenance, compliant refrigerant tracking, inventory, bar coding, web-based service, mobile device synching and asset depreciation.

The previously mentioned dispatch and scheduling features are quite noteworthy, incorporating features for directly emailing information and reports from within the program, integration with Microsoft Map Point for wirelessly sending directions to workers out on service calls, the ability to attach files or images to jobs, call tracking and note options. Users can view schedules by day or time, or sort schedules by sales staff, technicians, estimators, management or other factors, which helps to quickly find available staff and also keep up with labor, time and materials used on jobs.

The program's certified payroll module offers direct deposit, union reporting, government reporting and workers' comp tracking, with the ability to track multiple

pay rates per employee. It also integrates with the employee-focused features in other modules (such as the scheduling module) for tracking time and billing data. Invoicing functions include progress-based billing, credit limit tracking and the ability to store credit card information. Contractor Essentials offers additional tools for cash flow management, budgeting, managing vehicle and tools maintenance, along with features for marketing and lead tracking, and point-of-sale invoicing.

### Reporting

Contractor Essentials offers a strong collection of reporting options, from the traditional accounting and financial output for AR, AP, payroll and period summaries, to contractor-specific output such as contract reports and proposals, equipment and service reports, government reporting, and productivity analyses by several methods. Although customization options are fairly basic, the program can output data into Excel or Word for additional tailoring. Reports can also be saved as PDF files. All job reports and estimates meet AIA guidelines.

### Import/Export/ Integration

All of Contractor Essentials' modules are integrated to form a suite, with data flowing between areas as needed. Data synchronization, using Windows Mobile Device Center or Active Sync, is available for the Inventory module (using Windows Mobile-based smartphones and other Windows Mobile devices with integrated bar code scanners). The system can export

spreadsheet and text files, and integrates with Outlook for directly emailing documents from within the program.

### Support & Training

The Contractor Essentials system offers traditional basic Help and assistance features within the program, while the company's support website includes FAQs, news, program updates, contact options and information on training. Technical support is available in subscription packages.

### Relative Value

For service contractor businesses, Contractor Essentials provides a solid accounting back-end, with a very industry-focused front-end that offers great features for job management, dispatching, calendaring and maintenance.

