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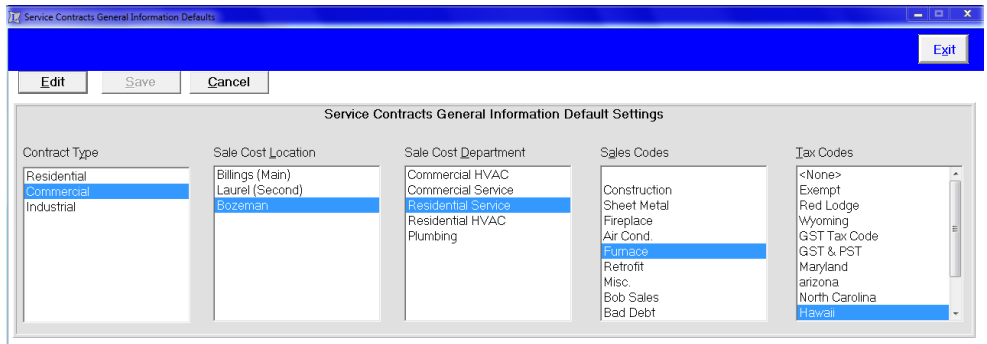
Welcome to CUC Software’s Fall 2011 newsletter! This newsletter contains information about some of the exciting new changes happening at CUC Software. We have also included some helpful articles on using special features in our software program. If you have any questions about information in this newsletter, please contact us and we will be happy to provide you with answers!

**NEW REMOTE TIME CLOCK INTERFACE MODULE!!!**

The Remote Time Clock module interfaces with ExakTime’s Pocket Clock/Time Summit/Account Linx mobile time tracking system to import hours posted in the field by cell phone for use in payroll. For pricing and more information, call us at 1-800-272-9908 and talk to Heidi. See [www.exaktime.com](http://www.exaktime.com) for a look at their system or call Danielle Capodici at 1-888-788-8463. Don’t forget to mention you use CUC Software so they know what interface you need.

**SERVICE CONTRACT DEFAULTS**

You can now set up defaults for adding service contracts on the Service Contracts General Information screen. Use this screen to specify default Contract Type, Sales Location, Sales Department, Sales Code, and Tax Code. To access this screen go to Service → Service Contracts → General Information Defaults.



Check out *National Documents* for your 2011 1099 and W-2 Forms.

[Click Here](#)

### DID YOU KNOW...?

- \* When running an AP Aging report for A Job, you can choose to view invoices for just one vendor on the job and/or include invoices for child jobs.
- \* On the Employee File Maintenance screen, there is a Labor Charge Out field. Use this field for a specific labor rate to charge for service hours by this employee. This labor rate takes priority over rates on Service Contracts, Customer File Maintenance and Service General Information. (This rate does not supersede Service Rate Table rates, where Rate Tables have been assigned to jobs.) This can be useful if you charge a different rate for journeymen or apprentices, etc.
- \* You can now set up a customized e-mail message to be included in the body of the e-mail that is sent to customers when you choose to e-mail their invoices. Edit this message on the Receivables General Information screen.
- \* The Invoice Detail field has been expanded from the Line One, Line Two, and Line Three input method. With this Change, up to 750 characters can be entered for repeat invoices generated from the Service Contract Maintenance screen.

### HELPFUL HINTS

- \* You can delete a Dated Notes for Inventory, Payables, Payroll, Receivables, and Specialties. In order to delete Dated Notes you must be assigned the Procedural Security right under each module.
- \* The Hold Box on the Employee Scheduling screen allows you to remove an appointment from the grid and change days on the calendar to reschedule that appointment. NOTE: If you exit the screen with a job in the Hold Box, it will be removed from the Hold Box.
- \* You can choose the length of time between refreshes on the Employee Scheduling screen. Go to Service → General Information and click Edit. The length of time can be between 1 and 9 minutes. You can also choose None. If None is chosen, you will have to manually select the refresh button on the Employee scheduling screen in order for the screen to refresh.
- \* In addition to just before closing a month, run your Accounting Accuracy Checking routines if you encounter a power outage, a network communication error, a computer freeze up, or a program error that prevents you from completing a posting routine.

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### REPLICATE A PREVIOUS REPETITIVE JOURNAL ENTRY

You can replicate an active or inactive Journal Entry on the Repetitive Journal Entry Maintenance screen. To do this bring up the Journal entry you wish to replicate and click the Replicate The Displayed Repetitive button. A message displays explaining what is going to take place. If you click Yes the new Repetitive Journal Entry is opened up in Edit mode. You can make any changes at this time. This is particularly useful if you have a large journal entry you wish to replicate.



### COMBINED PROFIT/LOSS AND BUDGET REPORT

The Combined Profit/Loss and Budget report shows actual dollar figures (from your Profit and Loss report) and your budgeted figures, along with percent of revenue. This report displays actual and budgeted figures for the current date range and year to date as well as previous year's actual period and year to date figures. There is the option to exclude overhead and net profit amounts from this report. NOTE: This report can be run for individual or multiple Loc/Depts or Company Wide. To access this report go to Accounting → Reporting → Balance Sheet and Profit/Los. Then click on the Combined Profit/Loss and Budget button at the top.

Combined Profit/Loss And Budget Report  
Date Range: Jan 2011 to Jun 2011  
Company Wide

| Acct Number                           | Account Description                   | Actual \$<br>01/01/2011<br>06/30/2011 | Actual<br>Pct Of<br>Revenue | Budget \$<br>01/01/2011<br>06/30/2011 | Budget<br>Pct Of<br>Revenue | Actual \$<br>01/01/2010<br>06/30/2010 | Actual<br>Pct Of<br>Revenue | Actual YTD<br>\$ Thru<br>06/30/2011 | Actual<br>Pct Of<br>Revenue | Budget \$<br>Thru<br>06/30/2011 | Budget<br>Pct Of<br>Revenue | Actual YTD<br>\$ Thru<br>06/30/2010 | Actual<br>Pct Of<br>Revenue |
|---------------------------------------|---------------------------------------|---------------------------------------|-----------------------------|---------------------------------------|-----------------------------|---------------------------------------|-----------------------------|-------------------------------------|-----------------------------|---------------------------------|-----------------------------|-------------------------------------|-----------------------------|
| <b>SALES &amp; OTHER INCOME</b>       |                                       |                                       |                             |                                       |                             |                                       |                             |                                     |                             |                                 |                             |                                     |                             |
| 35000                                 | Service Sales                         | \$85.00                               | 0.39%                       | (\$46.86)                             | -0.03%                      | (\$75.00)                             | -0.11%                      | \$85.00                             | 0.39%                       | (\$46.86)                       | -0.03%                      | (\$75.00)                           | -0.11%                      |
| 35015                                 | S' Metal Sales                        | \$450.00                              | 2.09%                       | \$877.68                              | 0.60%                       | \$0.00                                | 0.00%                       | \$450.00                            | 2.09%                       | \$877.68                        | 0.60%                       | \$0.00                              | 0.00%                       |
| 35020                                 | Fireplace Sales                       | (\$500.00)                            | -2.32%                      | \$41.70                               | 0.03%                       | \$107.17                              | 0.16%                       | (\$500.00)                          | -2.32%                      | \$41.70                         | 0.03%                       | \$107.17                            | 0.16%                       |
| 35025                                 | Air Condi Sales                       | \$800.00                              | 3.71%                       | \$877.68                              | 0.60%                       | \$0.00                                | 0.00%                       | \$800.00                            | 3.71%                       | \$877.68                        | 0.60%                       | \$0.00                              | 0.00%                       |
| 35030                                 | Furnace Sales                         | (\$85.00)                             | -0.39%                      | \$3,312.48                            | 2.28%                       | \$300.00                              | 0.45%                       | (\$85.00)                           | -0.39%                      | \$3,312.48                      | 2.28%                       | \$300.00                            | 0.45%                       |
| 35035                                 | Retrofit Sales                        | (\$100.00)                            | -0.46%                      | \$187.50                              | 0.13%                       | \$0.00                                | 0.00%                       | (\$100.00)                          | -0.46%                      | \$187.50                        | 0.13%                       | \$0.00                              | 0.00%                       |
| 35040                                 | Misc Income                           | \$750.00                              | 3.48%                       | \$234.36                              | 0.16%                       | \$250.00                              | 0.37%                       | \$750.00                            | 3.48%                       | \$234.36                        | 0.16%                       | \$250.00                            | 0.37%                       |
| 35060                                 | Labor                                 | \$22,156.99                           | 102.78%                     | \$139,850.64                          | 96.27%                      | \$66,477.16                           | 99.13%                      | \$22,156.99                         | 102.78%                     | \$139,850.64                    | 96.27%                      | \$66,477.16                         | 99.13%                      |
| 35075                                 | Bad Debt                              | (\$2,000.00)                          | -9.28%                      | (\$69.30)                             | -0.05%                      | \$0.00                                | 0.00%                       | (\$2,000.00)                        | -9.28%                      | (\$69.30)                       | -0.05%                      | \$0.00                              | 0.00%                       |
|                                       | <b>TOTAL SALES/OTHER INCOME</b>       | <b>\$21,556.99</b>                    | <b>100.00%</b>              | <b>\$145,265.88</b>                   | <b>100.00%</b>              | <b>\$67,059.33</b>                    | <b>100.00%</b>              | <b>\$21,556.99</b>                  | <b>100.00%</b>              | <b>\$145,265.88</b>             | <b>100.00%</b>              | <b>\$67,059.33</b>                  | <b>100.00%</b>              |
| <b>DIRECT MATERIAL/EQUIPMENT/LABO</b> |                                       |                                       |                             |                                       |                             |                                       |                             |                                     |                             |                                 |                             |                                     |                             |
| 42222                                 | Donation Account                      | \$7,400.00                            | 34.33%                      | \$468.78                              | 0.32%                       | \$825.00                              | 1.23%                       | \$7,400.00                          | 34.33%                      | \$468.78                        | 0.32%                       | \$825.00                            | 1.23%                       |
| 46010                                 | Direct Material                       | \$120,056.95                          | 556.93%                     | \$12,990.84                           | 8.94%                       | \$994.58                              | 1.48%                       | \$120,056.95                        | 556.93%                     | \$12,990.84                     | 8.94%                       | \$994.58                            | 1.48%                       |
| 46011                                 | Direct Equipment                      | \$5,677.38                            | 26.34%                      | \$22,144.20                           | 15.24%                      | \$14,069.49                           | 20.98%                      | \$5,677.38                          | 26.34%                      | \$22,144.20                     | 15.24%                      | \$14,069.49                         | 20.98%                      |
| 46015                                 | direct                                | \$0.00                                | 0.00%                       | \$406.26                              | 0.28%                       | (\$100.00)                            | -0.15%                      | \$0.00                              | 0.00%                       | \$406.26                        | 0.28%                       | (\$100.00)                          | -0.15%                      |
|                                       | <b>TOTAL DIRECT MATERIAL/EQUIPMEN</b> | <b>\$133,134.33</b>                   | <b>617.59%</b>              | <b>\$36,010.08</b>                    | <b>24.79%</b>               | <b>\$15,789.07</b>                    | <b>23.54%</b>               | <b>\$133,134.33</b>                 | <b>617.59%</b>              | <b>\$36,010.08</b>              | <b>24.79%</b>               | <b>\$15,789.07</b>                  | <b>23.54%</b>               |

### STATUS CHANGE REPORT

A report is available to maintain a log of status changes for a scheduled call. This option can be turned on in the Service General Information screen, and the report can be run by going to Service → Reporting → Schedule Log Report. NOTE: You will need the Service Menu Right to access the Schedule Log Report.

Exit

**Schedule Types**

- All Types
- Service Calls Only
- Leads Only
- Major/Minor Jobs
- Customers Only
- General Only

Begin Date:

End Date:

All Service Calls

One Service Call

All Dispatchers

One Dispatcher

**Report Display**

| Computer Date         | Dispatcher Name | Serv Job ID | Type    | Status   | Priority     | Sched Date | Scheduled Time   | Dispatcher Action | Scheduled Employee |
|-----------------------|-----------------|-------------|---------|----------|--------------|------------|------------------|-------------------|--------------------|
| 08/26/2011 8:46:34 AM | Brown, Katie    | 1422        | Service | Notified | Res Contract | 08/26/2011 | 1:15 PM- 3:15 PM | Notified          | Brown, Katie       |
| 08/26/2011 8:46:44 AM | Brown, Katie    | 1422        | Service | Started  | Res Contract | 08/26/2011 | 1:15 PM- 3:15 PM | Started           | Brown, Katie       |



## PRINT TO FILE

In a number of areas throughout the system, a **Print to File** or **File** button is available. This option allows you to save the selected report as a .txt (text) file for e-mailing or opening in any other program that supports text files such as Microsoft Excel®. (ie: Financial Reports)

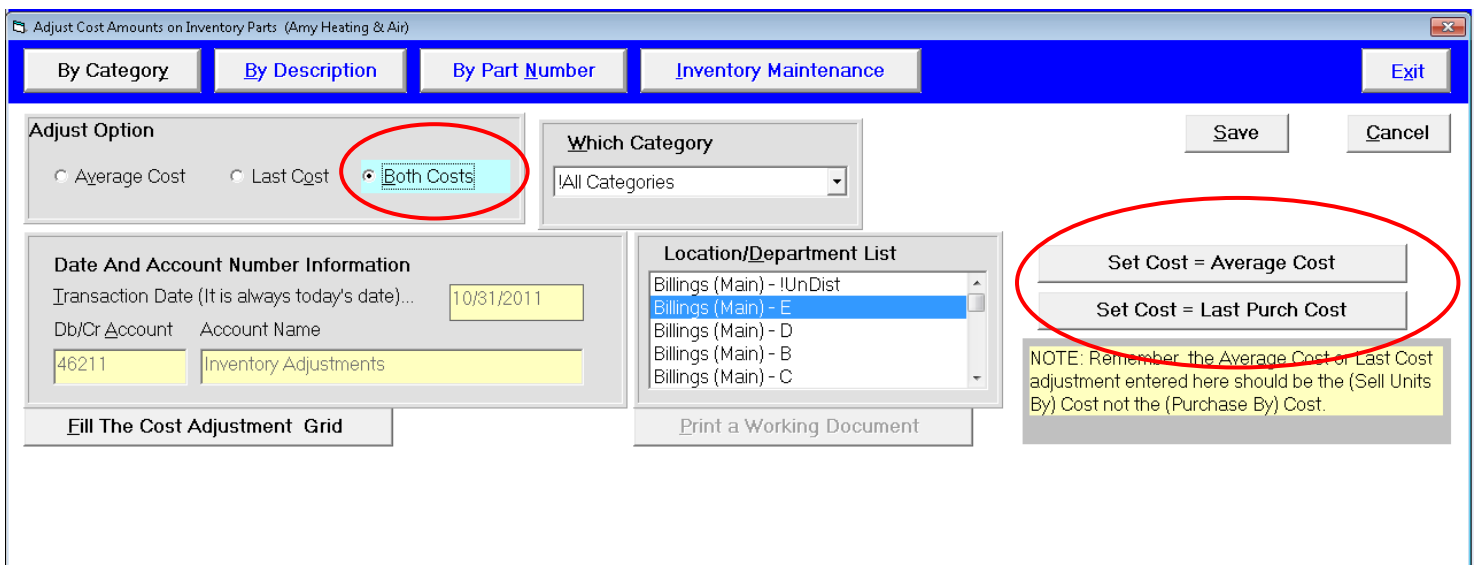
To utilize this function, make your report selections, then click the **Print to File** button. Name the file (ie: JuneBalSheet.txt) and save it under a drive and directory where you can access it later.

To open the text file in Microsoft Excel®, first open Excel®. Next, choose **Open** from the **File** menu. At the

bottom of the Open dialog box, there is a **Files of type** field. Change the file types in this field from the default "Microsoft Excel Files" to "Text Files." Browse to the drive and directory where you saved your text file and select the file by double clicking on it. Select **Delimited** on the Text Import Wizard which displays next, then choose **Next**. Make sure to uncheck "Tab" and check "Comma" for the delimiter before selecting **Next** again. Choose **Finish** to view your report in Excel®.

## ADJUST BOTH AVERAGE AND LAST COST

There is an option on the Inventory Cost Adjustment screen to adjust both the Average cost and Last cost for a part. Two buttons are available to **Set Cost = Average Cost** or **Set Cost = Last Purch cost**. Click either button to default cost into the New Cost field, or manually enter the cost to adjust to. When saving, the average cost and last cost for the part(s) are both updated to the new cost



Adjust Cost Amounts on Inventory Parts (Amy Heating & Air)

By Category | By Description | By Part Number | Inventory Maintenance | Exit

Adjust Option  
 Average Cost  
 Last Cost  
 Both Costs

Which Category  
 |All Categories

Save | Cancel

Date And Account Number Information  
 Transaction Date (It is always today's date)... 10/31/2011  
 Db/Cr Account Account Name  
 46211 Inventory Adjustments

Location/Department List  
 Billings (Main) - !UnDist  
 Billings (Main) - E  
 Billings (Main) - D  
 Billings (Main) - B  
 Billings (Main) - C

Fill The Cost Adjustment Grid | Print a Working Document

Set Cost = Average Cost  
 Set Cost = Last Purch Cost

NOTE: Remember the Average Cost or Last Cost adjustment entered here should be the (Sell Units By) Cost not the (Purchase By) Cost.

Call Us today for a demo and/or pricing of our Inventory Kit Assembly, Critical Performance Measures (CPM), and Remote Time Clock Entry modules.



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Thank you for reading our Fall 2011 Newsletter! If you have any questions, suggestions, comments, or anything you would like us to know you may reach us by any of the options to your left.

**RECEIVE 25% OFF NEXT YEARS MAINTENANCE AGREEMENT!!**

Just a reminder that if you refer a company to CUC Software, and that company becomes a customer, you will receive a 25% discount on your maintenance agreement next year. Refer two customers and receive a 50% discount. Refer four customers, and if all four become CUC Software customers, you receive your maintenance agreement FREE for a year!!



Follow us on Facebook & Twitter to see our Tip of the Day and other important notifications

**CONTRACTOR ESSENTIALS<sup>®</sup> MODULES**

- \*Accounts Receivable
- \*Accounts Payable & Purchasing
- \*General Ledger
- \*Payroll
- \*Job Costing
- \*Critical Performance Measures (CPM)
- \*Equipment Tracking
- \*In House Transactions
- \*Inventory
- \*Marketing Manager
- \*Flat Rate Pricing Interface
- \*Point of Sale Invoicing
- \*Progress/AIA Billings
- \*Refrigerant Tracking
- \*Service Management & Dispatching
- \*Task Manager
- \*Tool Management
- \*Vehicle Maintenance
- \*Material Estimation
- \*Inventory Kit Assembly
- \*Remote Time Clock Interface

To access an explanation of each module click [HERE](#).