



# Market Booming for Contractor/Construction Accounting & Management Systems

As more people are creating more service-related businesses, the software industry has been scrambling to keep up with the growth. And small service businesses (equipment rentals, HVAC and home builders) continue to see growth.

This growth has produced more demand for software that suits the needs of these specialized business types. As a result, software vendors continue to add more features and functions to their core products in order to appeal to both the traditional builder and the contracting trade.

Each industry requires its own set of functionality. Traditional construction companies need a strong job cost module, and service and repair companies need a solid service and dispatch module, with perhaps an equipment management module, as well. This is a major reason why most of the construction software products reviewed in this issue will not suit all

construction-related businesses.

One of the other reasons is strictly monetary. The more robust products tend to be more expensive, and the entry-level products will easily fit the budget restraints of the smallest company. Regular readers of *The CPA Technology Advisor* will know that 2010 brought in a new way of looking at and reviewing software products. The result of this new review method makes the product ratings easier to understand. So a 5-star product will contain just about every feature available for that product type, as outlined in our review criteria on this page. However, that also might mean that a product that earns a 4-star rating could easily be the better product for a particular business than the higher-rated 5-star product based on needed functionality.

For example, a small builder may need a strong job cost module, but if he doesn't have a service department, he would have

little use for a dispatching module. The same goes for the independent HVAC repair business that really needs that module, but does not need the project management module.

The bottom line is that we provide a benchmark of what products in this genre should provide, but we recommend that anyone looking for a new product should invest the time to research the many options available in today's market based on their individual needs. Many of the products reviewed in this issue offer free demos so those parties interested will have a better idea about the suitability of a product after seeing it perform.

Please remember that it's only the user's opinion of the software that really matters. The products reviewed here are all excellent in their own way and at least one is likely to be a perfect fit for your small construction industry clients. ■

## CUC Software — Contractor Essentials

800-272-9908  
[www.cucsoft.com](http://www.cucsoft.com)

Contractor Essentials from CUC Software was developed in the early 1980s by a working contracting company. Highly industry-specific, the program was developed for those in construction related trades, providing users with the specialized tools needed to run their businesses.

### ► BASIC SYSTEM FUNCTIONS:

Contractor Essentials has an easily navigated user interface with a drop-down menu bar at the top of the screen that provides access to all system modules. A vertical menu at the left of the screen provides quick access to assigned tasks and frequently used system functions. My

Appointments is an excellent interactive screen where you can record appointments, leads, customers or jobs. Appointments can be set as priority, geographical zones appointed and assigned, and icons assigned that display job status. Data-entry screens populate the entire screen and are easily navigated, with lookup options available throughout. The My Tasks area can be easily customized or hidden. Reminder notes can also be created and edited as needed. Contractor Essentials will work with Windows 2000, XP, Vista and Windows 7 on workstations, and works with Windows 2003 and 2008 Server editions.

### ► CORE ACCOUNTING CAPABILITIES:

Contractor Essentials' standard modules include GL, AP, AR, Purchasing, Payroll

and Job Costing. The accounting menu includes the GL feature, as well as asset management, budgeting and banking functionality. The AP module processes invoices, sets up recurring invoices, handles all system purchase orders, and supports vendor direct payments. The AR module allows users to process payments received, utilize point-of-sale invoicing and print customer statements. Special job invoicing is also completed in the AR module. The Payroll module supports multi-state payroll, handles certified payroll reporting, and can handle multiple deduction types. Labor union payroll can also be processed and employees classified by their professional status.

Contractor Essentials also offers numerous add-on modules designed to work with

the core product, including Equipment Tracking, Inventory, Flat Rate Pricing Interface and Point of Sale Invoicing. Contractor Essentials offers multi-level system security where access levels can be added according to the primary menu, as well as the first and second submenu. Users have the option to require password entry to access the system.

► **CONSTRUCTION/CONTRACTOR-SPECIFIC FEATURES:**

Contractor Essentials allows users to assign default percentages for job estimates where an estimate has not already been entered. Basic estimates are easily entered in the job estimating feature found under Specialties. Users can also edit existing estimates, convert previous jobs to an estimate for bidding purposes, and merge bids. The Estimating General Info screen allows users to enter information for all estimates to use as a default, which can be overwritten when necessary.

Job information is easily tracked using a variety of resources, including the posting activities, which provides a list of information such as material to jobs, phase units complete, and transfer warranty reserve. Job phases are easily tracked using a variety of reports, and the Progress Billing module allows users to enter invoices based on the costs posted during an allotted time frame. Customer, vendor, employee and subcontractor management is easily handled, with vendors tracked and assigned a specific category for easy costing. The customer module allows users to record basic information, along with contacts, deposit information, job information, service contracts and notes/files. Subcontractor information can be easily tracked in the vendor files, as well, and the Payroll module tracks different employee classifications for sales reps, service techs, and estimators, along with regular employees. Employees can be assigned a skill level, if desired.

The optional Inventory module handles multi-warehouse tracking, allows users to enter both cost and count adjustments, and attach barcodes. It also offers serialized

inventory processing, allowing users to enter product serial numbers for each item. The Purchase Order function in the AP module allows users to assign PO numbers, invoice terms, any discount information, and enter up to 499 line items on the PO.

Contractor Essentials offers a top-notch Service Management and Dispatch module, allowing easy dispatching of technicians based on criteria assigned by the dispatch manager. Users can also enter all maintenance contract information, and all customer information is displayed to the dispatcher upon receiving a call. The Service Management & Dispatching module also integrates with e-Service, which allows users to send work orders electronically, as well as with the Map Manager, which allows users to map out the dispatch schedule.

An excellent Equipment Tracking module easily tracks vital information such as equipment installation dates, serial numbers, any warranty information, and the service history of the equipment.

► **REPORTING & MANAGEMENT TOOLS**

Reporting options are available in each of the modules, with the Job Information report being the most comprehensive. This is where users can view estimated and to-date costs, balance, percent spent, estimated hours, to-date hours used, and balance hours. For more itemized reporting, the tabs above will produce itemized reports for labor, maintenance, equipment, sub-contractors, purchases, job phases, etc. You can also view the criteria used for report processing and adjust it as needed. Other reports include the Job Project and the Yearly Historical Analysis, which provides a variety of reports detailing costs over/under, estimators, materials/equipment comparison, and average labor costs. The report criteria allows users to choose as much or as little data as desired, with the option to expand summary reports to show more detail. The AR module also offers a variety of special job invoicing options including AIA Job Invoicing, Job Phase Progress Billing, Time and Material Invoicing, and Cost Basis Job Invoicing.

Contractor Essentials allows users to create custom work orders, invoices, statements, POs and bids that can be saved for future use. Invoices, work orders and POs can also be saved as PDF files and attached to job files. The optional Marketing module allows users to create labels, form letters and lists, and interfaces with Microsoft Word.

► **INTEGRATION/IMPORT/EXPORT:**

Contractor Essentials is an integrated system where all modules and add-ons are designed to work together. Easy integration with Microsoft Office products such as Word, Outlook and Excel makes it easy to email documents, handle mail merges and export data to spreadsheets. Additional modules available from the vendor include Critical Performance Measures, Material Estimation, Tool Management, Vehicle Maintenance, Task Manager and Refrigerant Tracking.

► **HELP/SUPPORT:**

The Help option in Contractor Essentials is sufficient but could probably be improved. Annual support options are available at varying levels, starting at \$1,930 for one to six users, and include toll-free phone support in addition to all system updates and enhancements for that year. Support is also available on a per-call basis. Training is available onsite or at CUC's corporate office. Private online workshops are available, as well.

► **SUMMARY & PRICING**

Contractor Essentials from CUC Software is available starting at \$334.34 for a monthly lease option or \$10,685 purchase option on a one- to three-user system that includes GL, AR, AP, PR, Job Costing, Service Manager, Inventory and Equipment Tracking modules. Contractor Essentials represents industry-specific software at its finest with a strong Job Costing module and an outstanding array of industry-specific modules for contractors of all types. A user-friendly interface makes this an excellent investment for the construction/contractor business.

CONTRACTOR/ CONSTRUCTION	CATEGORIES COMPANY/PRODUCT ▼	Basic System Functions	Core Accounting Capabilities	Construction/ Contractor Specific Features	Reporting & Management Tools	Integration/ Import/Export	Help/Support	2010 Overall Rating
	CUC Software Contractor Essentials <a href="http://www.CPATechAdvisor.com/go/2860">www.CPATechAdvisor.com/go/2860</a>	4.25	4.5	5	5	4.75	4.25	4.75