



CUC Software — Contractor Essentials

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Contractor Essentials from CUC Software evolved from EMS Construction Software and has since been completely revamped. The vendor continues to add product enhancements on a regular basis. Contractor Essentials features an excellent Service module, which includes an incoming service call board and comprehensive dispatch/scheduling feature. This makes it an ideal fit for specialty contractors such as HVAC, sheet metal, roofing, electrical, plumbing, fire prevention and general contractors.

LEARNING CURVE/EASE OF USE

The user interface offers a menu bar at the top with a list of system modules, and the screen layout is sensible with easy navigation. An Assigned Tasks bar to the left of the screen provides a user-defined list of frequently used functions sorted by module. The option to choose a full screen is ideal and is much easier on the eyes, particularly if doing a large amount of data entry. The Job File Maintenance screen allows for the addition of new customers, as well as entering or editing job information. It contains several options from which to choose, including job type and start date, as well as whether it's a phased job, uses AIA billing, has certified payroll, and uses progress billing or cost basis billing. An option is also available to create a mass amount of jobs, which is a terrific feature and a timesaver. Materials can also be posted to jobs.

One of the best features in Contractor Essentials is the excellent Service module, where users can enter new

service jobs and dispatch technicians. The service call screen is comprehensive yet easy to navigate with an area to enter equipment at the site of the call, enter and maintain service contracts, check and maintain site maintenance history, and note when the work is complete. The scheduling screen allows for better management of all outstanding service jobs and job turnaround time. The information provided shows date promised and job problem, and it allows the user to code the job based on priority. Jobs can be dispatched by zone so technicians can be responsible for their own area. And status icons can be applied to each job, allowing for quick assessment of the progress on each service call. The service module also integrates with Microsoft Map Point to ensure that service technicians arrive on time.

MODULE & ADD-ONS

Contractor Essentials offers numerous system modules, including GL, AR, AP, Payroll, Job Costing, Service Manager, Inventory, Estimating, Marketing, Tool Management, Vehicle Management, EMS Task Master, Flat Rate Interface, Point of Sale, Refrigerant Tracking, In House Manufacturing, Progress/AIA Billing and Equipment Tracking.

The latest version contains several new features, including the addition of a personal tasks option for the desktop, improved reporting capabilities, the ability to enter and track credit limits, and improved scheduling capability. All modules have received enhancements of some sort, primarily in improved system navigation.

PRODUCTIVITY TOOLS

The addition of the Personal Tasks List allows users to record essential tasks and provides easy desktop access to the list. The Employee schedule option contains a weekly display of each workday along with items scheduled. The Marketing module allows for the creation of contract proposals and provides a Mail Merge document generator. Leads and referrals can also be tracked for future business. As previously mentioned, the Service Call and Dispatch Schedule functions make monitoring service calls easy and efficient. The Service Task Manager module allows for flat rate billing codes and posting of labor times and rates by task. The Dated Notes and File Attachment feature allows users to attach files, photos and other documents.

IMPORT/EXPORT/INTEGRATION

Contractor Essentials is a fully integrated system, with all modules and add-ons designed to interface smoothly. The Microsoft Word Interface allows users to create a document using Microsoft Word while still in Contractor Essentials and then determine the merge choice, such as customers, service contracts, leads, contract proposals, as well as service calls. Contractor Essentials also offers an interface with Microsoft Outlook for emailing invoices, work orders, purchase orders, etc. as PDF attachments and a Data Export feature.

REPORTING

Reporting options are found in each module. Contract reports, equipment reports and service reports can all be printed from the service module. Contract proposals,

lead tracking information, sales data by rep, and referral sources can also be printed. Reporting customization capabilities are limited to default criteria, with limited options to create custom reports within Contractor Essentials, although the reporting function has been enhanced in this latest version and currently offers expand-and-shrink capability for more reports along with more column sort options. Many reports can be printed to file, then imported into programs such as MS Excel for copy and paste, file attachment, data manipulation or further sorting.

SUPPORT & TRAINING

Contractor Essentials offers three levels of product support: Basic, which is simply per-incident support charged on an hourly basis; Standard, which includes product enhancements and updates for one year with per-hour support rates at a reduced price; and Premium support, which offers toll-free telephone support along with all product updates. Premium support starts at \$1,930 annually for up to six users. Training options include onsite training or classroom training at the vendor's corporate headquarters. A Help file is also available but provides limited information.

Relative Value

Contractor Essentials is an excellent fit for service contractors that require a comprehensive service and dispatch feature. Contractor Essentials starts at \$23,780 for one to three system users. Pricing includes all available modules but a contractor can get going with a very solid system including core modules for \$10,685.00. Lease purchase options are also available.

