

2012 Review of C-U-C Software — Contractor Essentials

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C-U-C Software — Contractor Essentials

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(<http://www.cpapracticeadvisor.com/10626060/>)

Best Fit: Contractor Essentials from CUC Software is an excellent fit for small to mid-sized construction-related businesses of any size, but its abundance of specialty modules makes it a terrific choice for service-related contractors.

Strengths:

- The “My Appointments” function allows users to easily manage appointments and workload
- An extensive array of add-on modules makes it suitable for just about any type of construction related business
- Top-notch service and dispatch module provides dispatchers with both excellent scheduling capability and customer/equipment/warranty history at a glance
- Offers built-in estimating capability

Potential Limitations:

- Report customization options could be improved
- Better product and support detail on website would be helpful

In business for over 30 years, CUC Software has been offering construction specific software designed for both the construction and the trade industry. Contractor Essentials contains solid accounting functionality along with an impressive selection of modules that handle everything from job costing to service dispatch.

BASIC SYSTEM FUNCTIONS - 4.25 Stars

Contractor Essentials offers users an easily navigated user interface screen. A drop down menu at the top provides access to system functions, and a user-defined vertical menu located at the left of the main screen provides quick access to designated user functions and common tasks. Users can also choose to utilize organizational tools such as the ‘My Tasks’ area, or simply hide it if not used. Contractor Essentials data entry screens are well-designed, and contain an abundance of drop-down menus, although the search function is somewhat awkward. All data entry screens offer an extensive array of tabs for quick access to related screens. For quick access to vital company information, the Critical Performance Measures module provides categorized reports that look at both company and industry targets, and measures current company performance against both. Remote employees can easily access the system from their location. Contractor Essentials works on a Windows platform, and will work with Windows Vista, Windows XP and Windows 7. Server users will need Windows 2000+. Contractor Essential’s data entry screens are easily navigated and contain good look up options as well as tabs to related module options.

CORE ACCOUNTING CAPABILITIES - 4.75 Stars

Contractor Essentials is a modular product, with users able to choose the modules needed. The core financial modules include GL, AP, AR, and Payroll, with additional functions such as asset management and budgeting found in the GL module. The AP module offers users the ability to pay invoices traditionally via check, by credit card, or by direct deposit. Enter recurring invoices for future payment, and easily integrate with the Contractor Essentials Purchase Order module for easy tracking of system expenses. The AR module provides easy customer tracking and maintenance, and also contains the ability to manage all bank deposits, as well as handling recurrent invoicing for customers. The Payroll module is construction/contractor specific, offering options such as productivity reporting and union reports. It can also handle multiple pay rates for each employee, and is multi-state friendly, with Certified Payroll available. There are

numerous accounting and financial modules available as well, including Estimating, Point of Sale, Progress/AIA Billing, and Inventory & Inventory Kit Assemblies. Contractor Essentials contains solid audit trail functionality, with all system transactions tracked by user. Multi-level security provides managers with the ability to determine system level usage based on both primary and secondary level menus, with the option to assign system passwords as needed.

CONSTRUCTION/CONTRACTOR-SPECIFIC FEATURES - 5 Stars

Contractor Essentials contains project estimate capability in the Job Cost module, with users able to edit and track estimates as needed. Percentages can be assigned to the basic estimate, and adjusted when necessary. The optional Material Estimation module allows users to enter bid information into the system and later convert the data into a job. Bid information can also be imported from portable electronic devices, making it easy for field personnel to track information and later export into the main system.

All job information is easily accessible by project managers and extensive job, estimating, and materials billing and reporting options available, which provides those managers with quick access to current data. Users can also access current job information by customer number, including details such as job cost by phase, progress billing, and time & materials billing. Managers can easily enter change order information, with both original and change order status accessible.

Contractor Essentials contains excellent vendor, customer, employee, and subcontractor tracking and management capability. The Marketing Manager module allows users to track potential leads, convert those leads to sales, and also interfaces with both Microsoft Word, for easy document and letter processing, and the Critical Performance Measures module, so managers will also have excellent sales, and sales conversion rates available. Features such as the Notes/Files option allows users to record all outside interaction, whether with a customer or vendor, and users can assign tasks to follow up on any new or existing items.

The Payroll module contains excellent employee management capability, with users able to enter separate classifications for each employee that can be later tied back to a specific job or function. The Inventory module allows users to set up and manage inventory items, including bar coding for easier tracking.

The serialized inventory option allows you to enter serial numbers when receiving products, making it easier to track against a job. An Inventory Kit Assembly module is available as well. The Purchase Order module, found under the AP module, funnels all purchasing detail directly into AP for each vendor management and invoicing. Other optional modules, such as the Vehicle Maintenance module allows users to track costs for each vehicle in service, including any scheduled maintenance.

The Tool Management module provides managers an easy way to keep track of valuable tools, with managers able to check tools out to specific employees and specific jobs. Contractor Essentials also contains an excellent Service Management and Dispatch module which makes scheduling and tracking job detail easy. Not only does this module handle scheduling, it also provides phone system handlers with excellent information during the phone call, such as a detailed customer and service history. This module also integrates with the E-Service module, which provides service dispatchers with the ability to dispatch service call details to technicians in the field. An excellent Equipment Management module rounds out this impressive set of construction related modules, offering the ability to track vital detail about every piece of equipment including install dates, warranty detail and expiration and a complete service history.

REPORTING & MANAGEMENT TOOLS - 4.5 Stars

Contractor Essentials offers a good selection of job-related reports, including all job reports, progress billing reports, and estimates to actual totals. Labor and maintenance reports can be found in all of the optional job/contractor related modules, and AIA billing are available in Contractor Essentials as well. Contractor Essentials makes good use of templates, and users can easily create a variety of customized forms to suit their needs.

The "My Appointments feature found on the main user screen provides managers and employees both with an excellent time management tool, where users can easily access all current jobs and service details, as well as track all upcoming appointments. Recurring appointments can be easily entered in the My Appointments feature, with the ability to assign a specific priority level to each appointment.

INTEGRATION/IMPORT/EXPORT - 5 Stars

Contractor Essentials is a modular system, with a long list of module available that completely integrate with the core system. Other add-ons include Map Manager, Flat Rate Pricing Interface, Point of Sale Invoicing, In-House Manufacturing, Time and Material Billing, Progress Billing, and a Remote Time Clock Interface. Contractor Essentials also offers excellent integration with Microsoft Office products, and contains a direct interface with both Microsoft Word and Outlook.

HELP/SUPPORT - 4.5 Stars

Contractor Essentials contains solid help functionality. Various support plans are available for system users, depending on their needs. Toll-free support and all product upgrades and enhancements are available to every support users. Users can log into the support page on the CUC Software website to gain access to support personnel. Per-call support is available as well. Training options vary, with both onsite and classroom training available as needed. System users can also receive daily system tips on both Facebook and Twitter.

SUMMARY & PRICING

Contractor Essentials from CUC Software starts at \$10,685 for a 1-3 user system, and is available to lease for around \$335.00 per month. Contractor Essentials basic system includes GL, AR, AP, PR, Job Costing, Service Manager, Inventory, and Equipment Tracking modules with any additional modules prices separately.

While suitable for any construction company, Contractor Essentials is truly designed for the service contractor with a variety of industry specific modules available to just about any type of service contractor. Affordable pricing makes it particularly suitable to smaller businesses.

2012 Overall Rating: 4.75 Stars

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