



CUC Software, Inc.

1645 Ave D, Suite A
Billings, MT 59102

Phone: 800-272-9908
Fax: 406-254-9679

Email: sales@cucsoft.com
Web: www.cucsoft.com

ESSENTIALSPRO® - MATERIAL ESTIMATION MODULE®

The Material Estimation Module® allows you to create bids using your actual inventory costs, labor factors, overhead and gross profit percentages, etc. You can create bids from scratch, or from a template for either an existing or potential customer. If a bid is accepted, it can be converted to a job with the click of a button. At this point, if the bid is not for an existing customer, the customer is set up automatically. In addition, material and equipment pick sheets can be printed and items can be posted automatically from inventory to the new job based on the detailed bid.

BIDS

Bids use a combination of inventory items, special order items and labor factors to create a detailed estimate. As bids are set up, they can be split into phases just as you would set up a job in phases. When converted to a job, these phases are transferred to the job.

LABOR FACTORS

The Material Estimation module allows you to specify labor factors on your inventory items. As these inventory items are used on a bid, the labor factor automatically allocates the appropriate number of estimated hours to the bid. ie: On average it takes 2 hours to install a specific furnace, so you would specify a labor factor of 2 on the inventory part. Each time this part is used on a bid, 2 hours of labor defaults on the bid. Up to 5 different labor factors can be specified per part reflecting different degrees of difficulty surrounding the installation process.

A running total of labor hours and dollars displays on the bid screen for your reference.

BID TEMPLATES

Multiple bid templates can be stored to provide you with a quick start on bids for similar types of jobs. Templates can be set up from a blank estimate or based on an existing job. To create a new bid from a template, simply bring up the template and add or subtract line items to customize the bid for the proposed job. Additional line items can be added or taken away from a bid prior to converting it to a job.

DEFAULT SETTINGS

Material Estimation stores default settings for the following:

- Hourly labor and benefit rates
- Payroll tax and gross profit percentages
- Labor, material, equipment, and general/accounting overhead percentages

These defaults can be overridden on an individual bid basis, but provide you with a consistent means for including these costs in your bids.

REPORTING

The Material Estimation module includes a number of reports to help you track your bids. Reporting options allow you to print bids with or without cost figures and with or without material and equipment detail.

CUSTOM BID LAYOUT

EssentialsPro® allows you to lay out a custom bid form for use when printing or emailing bids to your customers. This form layout is similar to the utility used for creating custom invoices, work orders and purchase orders elsewhere in the system.