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CONTRACTOR ESSENTIALS MODULE REFERENCE GUIDE

Since the full demo of the Contractor Essentials program has all modules activated, we thought it might be helpful to have an overview of which features are tied to specific modules. This list is not designed to be exhaustive; however, gives you an idea of general features and which add on modules they are linked to. If you have any questions, please call our office at 1-800-272-9908

General Ledger

The General Ledger module is a core module that allows you to track accounting functions created using functions from other modules such as payroll, accounts receivable invoices, check writing, etc. Complete detail of transactions is available as well as financial reporting, budgeting, analysis and other standard accounting functions such as depreciation of assets. Most features for this module can be found under the **Accounting** menu.

Accounts Receivable

The Receivable module controls access to functions under the **Receivables** menu including customer maintenance and reporting, accounts receivable reporting (such as aging, invoice and payment history), bank deposits, etc.

Accounts Payable

The Payables module allows you to create and track purchase orders and vendor invoices. In addition, there are a number of reports available to help you track purchase orders and vendor history. Payable invoices can be paid via check, credit card and/or direct deposit with your vendors. Features under this module can be accessed under the **Payables** menu.

Payroll

The Payroll module contains all payroll functions including employee records (including multiple pay rates per employee), state/provincial and federal payroll tax tables, benefit and deduction options, union options, Certified Payroll reporting, employee wage and hour reporting, payroll tax reporting (including W2 – USA, or T4 and ROE reports - Canada).

Job Costing

The Job Costing module allows you to set up and track jobs, enter basic estimate information, break jobs down by phase, post various costs to jobs, and generate a wide variety of job reports. Features of this module can be accessed under the **Jobs** menu.

Critical Performance Measures (CPM)

The CPM module provides reporting of actual performance against two sets of user defined benchmarks, ie: company and industry targets. Reports are categorized under four groups which include Service, Installation, Marketing, Sales and Financial. Additionally, this module allows you to generate a log of all incoming phone calls; thereby tracking phone rings (leads) to knocks on the door (quotes) to signed deals (sales). Access is found under the **Specialties** menu.

Service Management & Dispatching

Our Service Management & Dispatching module allows you manage all aspects of your service department from setting up and scheduling service calls to entering & renewing planned maintenance contracts. Our TAPI phone interface works with your phone system to automatically display customer information on the service call setup screen.

The system builds a complete service history for equipment at each of your customers' sites; allowing equipment history to be transferred with the site to the new owner when a property is sold. In addition, this module allows you to process revenue transfers associated with service contracts if you wish to recognize revenue periodically throughout the life of the contract.

E-Service

This part of the Service module allows you to format and send work orders electronically to any device that accepts email. Also allows you to direct dial a customer or site through your computer by clicking a button next to the phone number displayed on the Incoming Service Calls or Customer File Maintenance screen.

Map Manager

Service also includes an interface with Microsoft Map Point® that enables you to map the service dispatch schedule. (activates a Map It button on the Employee Schedule screen and a selection on the right click menu for the schedule)

Features of the Service Manager module are accessed under the **Service** menu.

Inventory

The Inventory module allows you to set up inventory parts, post parts out of inventory to jobs, run a variety of inventory reports including quantity on hand, on order, buy/sell history and physical count forms. This module also has features that tie into service contracts (tied to Service & Dispatching) and Material Estimation.

Serialized Inventory

The Inventory module also allows you to tag specific inventory items as “serialized”, and prompts you to enter serial numbers when receiving those inventory items or select a specific serial number when posting those items out to a job.

Bar Coding

(requires purchase of bar code readers)

This add-on module works with the Inventory module to allow you to perform the following functions involving inventory items using a bar code reader:

- Physical count
- Transfers between locations (ie: warehouse to truck)
- Material posting (out to jobs)
- Receiving on or generating PO's

Inventory features can be found under the **Inventory** menu.

NOTE: Bar coding also works with the Tool Manager module to post tools to employees and the Point of Sale Invoicing module to scan parts onto the invoice.

Inventory Kit Assembly

The Inventory Kit Assembly module allows you to link a group of inventory parts and quantities together. Kits can be posted out of inventory to a job, rather than posting individual parts. When a Kit is posted, quantities of associated parts are adjusted accordingly and an itemized parts list is reflected on the job detail.

Material Estimation

The Material Estimation module allows you to set up bids and convert them to jobs. This module includes an option for Bid Templates which works with Inventory to build bids off of actual inventory costs as well as special order items. In addition, it allows you to post parts listed on a bid out of inventory to a job once a bid has been converted to a job. Features of the Material Estimation module can be found under **Job Estimating** on the **Specialties** menu.

The Material Estimation module includes a Laptop Interface function that provides routines to export current inventory to a laptop for use in the field. This function also allows you to import bids created on a machine in the field into the main database on the server.

Marketing Manager

The Marketing module allows you to track leads and referral sources. In addition, it provides a wide variety of sort options for labels, lists and form letters and includes an interface with Microsoft Word® to generate mail merge documents. Marketing also provides additional scheduling options for employees, such as salesperson scheduling for leads. In addition, a Referral Source field is enabled on the Customer File Maintenance and Incoming Service Calls screens when you use this module. Finally, information entered into the Marketing module as leads and by referral source is utilized by the CPM module to report lead conversion ratios and performance through Sales and Marketing Benchmarks. Features of the Marketing module are accessed primarily through the **Marketing** selection the **Specialties** menu.

Tool Management

The Tool Manager allows you to check your tools out to specific employees and further to a specific job as needed. Reports are available to assess which tools are checked out to specific employees as well as the condition that the tools were in when they were checked out. The Tool Management functions can be accessed under the **Specialties** menu.

Vehicle Maintenance

This module allows you to track costs on each of your vehicles and generate reports including cost per mile and scheduled maintenance options. Activities for Vehicle Maintenance can be accessed under the **Specialties** menu.

Task Manager

The Service Task Manager allows you to create your own flat rate codes based on actual inventory part costs, easily update your flat rate tasks based on inventory cost changes, and run analysis reports on your tasks. This module also provides an alternate labor posting screen to post labor in time sheet format by task. Activates for this module can be accessed under the specialties menu.

Flat Rate Pricing Interface

This interface allows you to import rates from third party flat rate systems into Essentials (please call for additional options:

- Callahan & Roach
- Collier
- RIPS (Gerald Inch)
- Mr. HVAC
- Maio
- NSPG

An Update (import) selection can be accessed under the **Specialties** menu, and a button on the Billing and Incoming Service Calls screen allows you to look up flat rate prices.

Refrigerant Tracking

The Refrigerant Tracking module allows you to track the usage, reclamation and disposal of refrigerants with special reports designed specially for refrigerant transactions. A Refrigerant Tracking selection on the Specialties menu provides access. In addition, pop-ups provide posting information and options during purchasing and posting routines.

In-House Manufacturing

The In House Manufacturing module provides functions related to the fabrication of inventory parts in house. Features can be accessed under In House Manufacturing on the Specialties menu.

Progress Billing

This module allows you to create progressive invoices against a job based on costs posted for specified time intervals. Features can be accessed under Special Job Invoicing (Job Phase Progress Invoicing) on the Receivables menu.

Time and Material Billing

Time and Material Billing is designed for use with customers you are billing for time and materials on a "cost plus percent" basis and enables you to create one or more invoices against costs posted to a job over specified periods of time using rate tables. Features can be accessed under the Special Job Invoicing (Time and Material Invoicing) selection on the Receivables menu and Time/Material Rate Tables under the Jobs menu.

Remote Time Clock Interface

The Remote Time Clock module interfaces with ExakTime[®]'s mobile time tracking system to import hours for payroll.

Equipment Tracking

The Equipment Tracking module allows you to track install date, serial number, warranty information and service history on various pieces of equipment at each site address where you have installed and/or done service work for a customer. Any customer may have multiple site addresses, each with it's own selection of equipment.

This module also allows you to track equipment revisions, assign tasks to equipment (ie: clean and check assigned a furnace on a contract call), and enter warranty comments.

Features of this module are integrated throughout the system; however some areas include the Equipment Create/Edit selection under the Service menu, the Equipment selection under Site Maintenance (Receivables), and the Equipment Assigned to Call selection under Service Contracts.

Point of Sale Invoicing

The Point of Sale Invoicing Module is designed to speed up entry of over the counter and field sales. This routine allows you to perform the following tasks from a single input screen:

- Create a job
- Enter work complete on a job
- Set up an invoice
- Post material from inventory
- Enter a bank deposit
- Apply a payment to an invoice

In addition, this routine allows you to create quotes, backorders and apply customer pricing levels.

GPS Interface

The GPS Interface module allows you to sync your schedule data with the NexTraQ[®] GPS tracking system.

EssentialsPro® Mobile App

The EssentialsPro Mobile app runs on either iOS or Android devices. The app uses a utility to communicate between mobile databases and your Essentials database. Mobile users are linked to an employee, and appointment information feeds from the schedule to the employee's phone or tablet device. App users do not have to have an active data connection to view and enter most information, but can sync when an active data or WiFi connection is available. This module is under active development and features are being added regularly.

Examples of information that syncs include:

- Service and Install work order information
- Lead appointments
- General appointments
- Site service history
- Site equipment
- Service contract
- Customer/Site alerts
- Add jobs from the field
- Auto email office when appointment is Complete or Needs Parts
- Add Site Equipment from field
- Signature Capture
- Email work orders to customer
- Print work orders in field
- Attach photos as job notes