

Sunburst Software Solutions

2378 Dane Hill Road, West Charleston, VT 05872

Phone: (802) 895-4929 Fax: (866) 684-5157

Email: sales@sunburstsoftwaresolutions.com

Website: www.sunburstsoftwaresolutions.com

Construction Application for Payment Solution minimum permission settings for Enterprise 5.0

When granting Construction Application for Payment Solution access rights to your QuickBooks file, the user that is assigned in the "Login As" drop down selection must have the following access rights to the QuickBooks company file – otherwise Construction Application for Payment Solution will not be able to access the required information to complete your AIA Billings.

To ensure that the user has sufficient permissions from the QuickBooks Company Menu, select Users, and then Set Up Users and Roles. Select the Role List Tab and then press the New Button. The Role Name should be CAPS User and in the Description Box should contain Permissions required to run Construction Application for Payment Solution. These permissions will allow a user to use CAPS to retrieve Estimate & Progress Billing Information from the QB file and does not necessarily allow them to actually create the Estimate or Progress Invoice itself in QuickBooks.

Beginning with the Company Area, select Company Information and grant Full Activity Access to View and Modify.

Select the Customers & Receivables Area, and allow Full Area Access Level

Select Lists, and expand this listing by clicking on the + sign:

- Select Customer/Vendor Profile List choose Full Activity Access

- Select Vendor Type List and choose Partial Activity Access Level with the ability to View and Print

- Select Customer:Job List and choose Full Activity Access Level

- Select Employee List and choose Full Activity Access Level

- Select Item List and choose Partial Activity Access Level with the ability to View and Print Lists

- Select Vendor List and choose Full Activity Access Level

Select Reports, and expand this listing by clicking on the + sign

- Select Customers & Receivables, and choose Full Activity Access Level with the ability to View and Print

- Select Jobs and choose Full Area Access Level to View and Print