

Sunburst Software Solutions

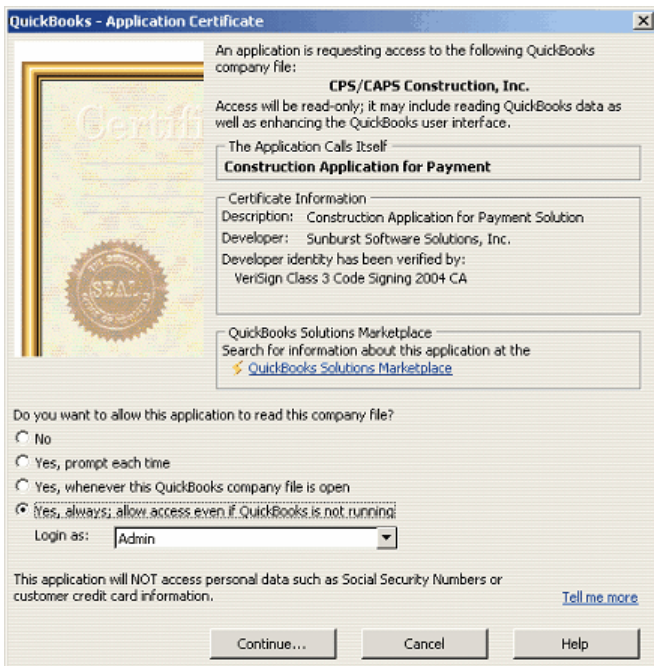
2378 Dane Hill Road, West Charleston, VT 05872
Phone: (888) 348-2877 Toll Free Fax: (866) 684-5157
Email: sales@sunburstsoftwaresolutions.com
Website: <http://www.sunburstsoftwaresolutions.com>

Granting Construction Application for Payment Solution (CAPS) Permission to Access Your QuickBooks Pro/Premier 2005 OR Enterprise 5.0 Company File.

Open the QuickBooks company file that you wish to use with CAPS, logging in as the QuickBooks Administrator in single-user mode (only required for initially granting permission).

CAPS will now access your file, requesting that you grant it permission to access the data file and retrieve your billing information. The following QuickBooks Integrated Application window will appear as shown below.

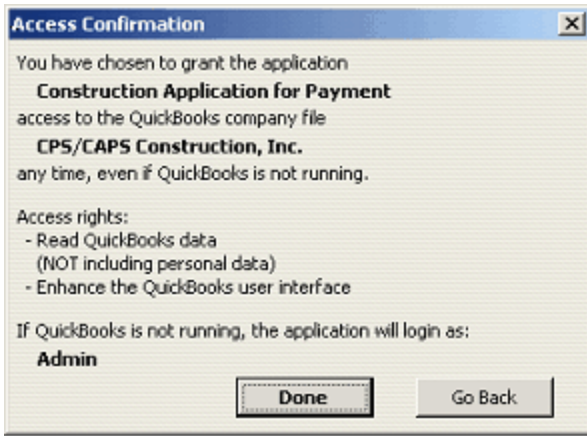
Intuit has made it easier to grant permissions in these versions, and allows Developers, such as ourselves, to indicate “how” we will be accessing your QuickBooks company data file. As shown below, CAPS will access your company data file on a “read-only” basis; meaning that we will ONLY READ the information that you have already entered in QuickBooks without ever writing anything back.



Select “Yes Always; allow access even if QuickBooks is not running”. In the drop down menu, choose the QuickBooks Administrator, or someone who has sufficient permissions to access billing information. Click the “Continue” button.

NOTE: CAPS will only access your QB file when you request it to, so, it is quite safe to select the **Yes, Always** option.

Enterprise Users be sure that the person chosen in the “Login as” has sufficient permissions. See Enterprise 5.0 Minimum Permissions Settings - <http://www.sunburstsoftwaresolutions.com/view-document-details/construction-application-for-payment-enterprise-5.0-permissions.htm>



The Access Confirmation screen shown to the left, simply provides an overview of the permissions that you have just granted to CAPS, and confirms that it will only **Read QuickBooks Data**.

Click on the **Done** button, and minimize QuickBooks, you will automatically be taken to the CAPS Address Information screen.

If you do not grant the permissions following these instructions, you must always have your QuickBooks Company file open when using CAPS, and no one else will be able to generate billings using CAPS.

	<p>In QuickBooks Pro/Premier 2005 and Enterprise 5.0, the “Login as;” user must have access to “Sensitive Financial Information” in order to query Invoices, therefore, the user selected must have correct permissions, as outlined in the Enterprise 5.0 Minimum Permissions - http://www.sunburstsoftwaresolutions.com/view-document-details/construction-application-for-payment-enterprise-5.0-permissions.htm</p>
--	--