

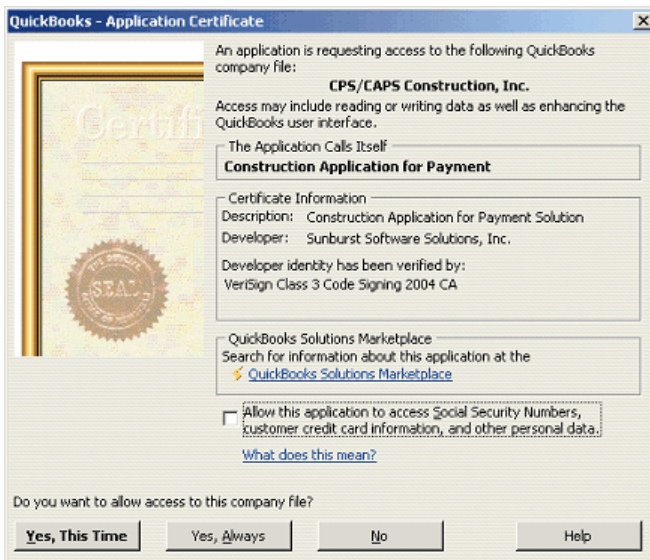
Sunburst Software Solutions

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Granting Construction Application for Payment Solution (CAPS) Permission to Access Your QuickBooks Pro/Premier 2002-2004 OR Enterprise 1.0-4.0 Company File.

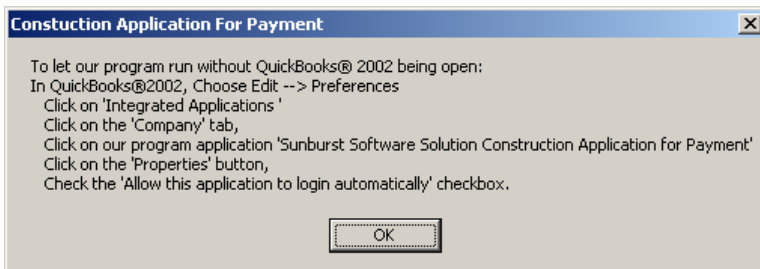
Open the QuickBooks company file that you wish to use with CAPS, logging in as the QuickBooks Administrator in single-user mode (only required for initially granting permission).

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.



Granting permissions in these versions of QuickBooks is a two-step process – please follow the instructions closely.

CAPS does not need access to Social Security Numbers, so this box may remain unchecked, however, you should select the Yes, Always button to continue.

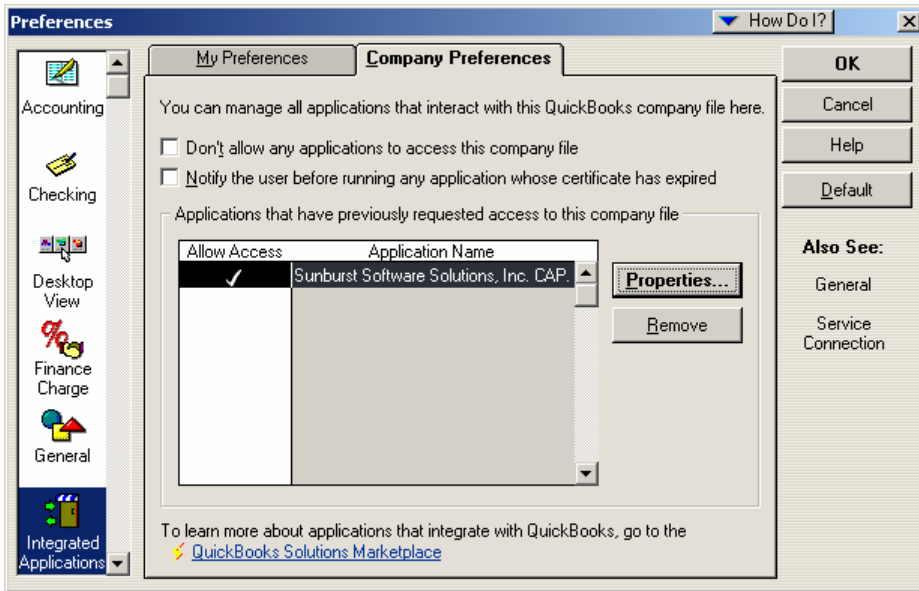


Following the instructions in the box to the left, in QuickBooks go to the Edit menu, choose Preferences, scroll to Integrated Applications, select the Company Preferences tab, highlight Construction Application for Payment Solution, and select Properties.



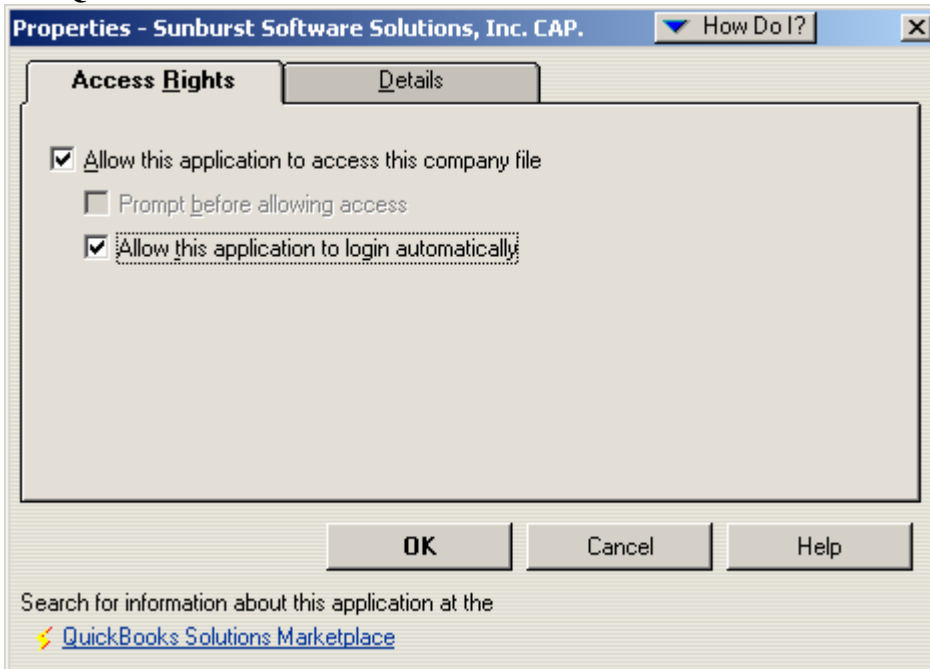
If you do not grant permissions following these instructions, you must always have your QuickBooks company data file OPEN when using CAPS, and no one else will be able to generate billings using CAPS.

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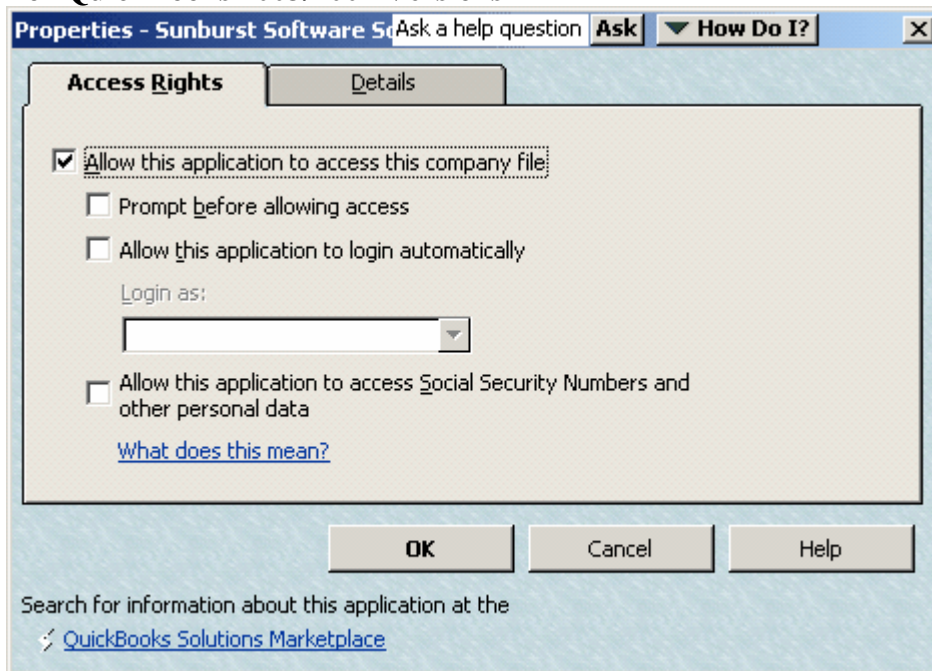
Click on Construction Application for Payment Solution to highlight it and then click on the Properties button.

For QuickBooks Pro/Premier 2002 Users



Click into to “check” both the “Allow this application to access this company file” AND “Allow this application to login automatically” options, as shown in the screenshot to the left.

For QuickBooks 2003/2004 Versions



Click into to “check” both the “Allow this application to access this company file” AND “Allow this application to login automatically” options, as shown in the screenshot to the left.

Additionally, in the Login as drop down, choose a user with sufficient permissions to access your billing data.

Construction Application for Payment Solution has no need to access Social Security Numbers or other personal data; so there is no need to check or select the option to “Allow this application to access Social Security Numbers and other personal data.”

	In QuickBooks 2003/2004 and Enterprise 3.0/4.0 the “Login as;” user must have access to Sensitive Financial Information in QuickBooks, in order to query Invoices, therefore, the user selected must have this type of access. This setting was a “bug” and was fixed by Intuit in QuickBooks 2005/Enterprise 5.0.
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When you have completed the above permission settings, you will automatically be taken to the CAPS Address Information screen and can continue your setup by following the instructions found in your manual.