



*Committed to Providing Contractors  
using QuickBooks with solutions!*

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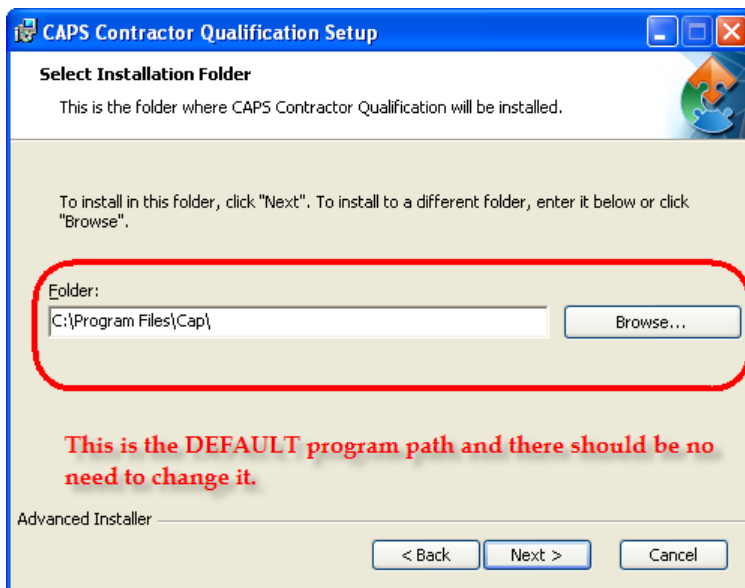
Email: [sales@sunburstsoftwaresolutions.com](mailto:sales@sunburstsoftwaresolutions.com) | Website: <http://www.sunburstsoftwaresolutions.com>

## Contractor Qualification Statement Enhancement

With QuickBooks closed, start CAPS – go to the Help menu -> Check for updates -> enter the Vista and//or Windows 7 UAC (User Account Control) password when prompted. From the Select an Update dropdown menu choose Version 5.0.214. Click the Download & Install button twice.

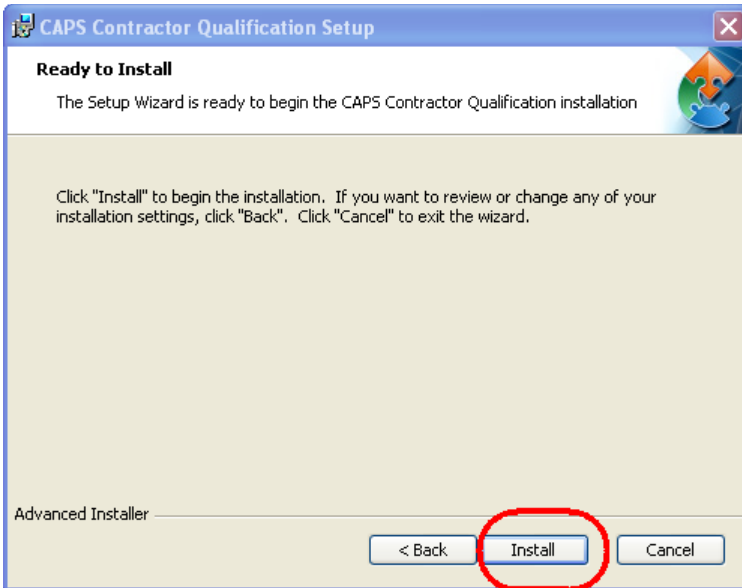
When the update has finished downloading the CAPS Contractor Qualification Setup Wizard will appear.

Click the Next button

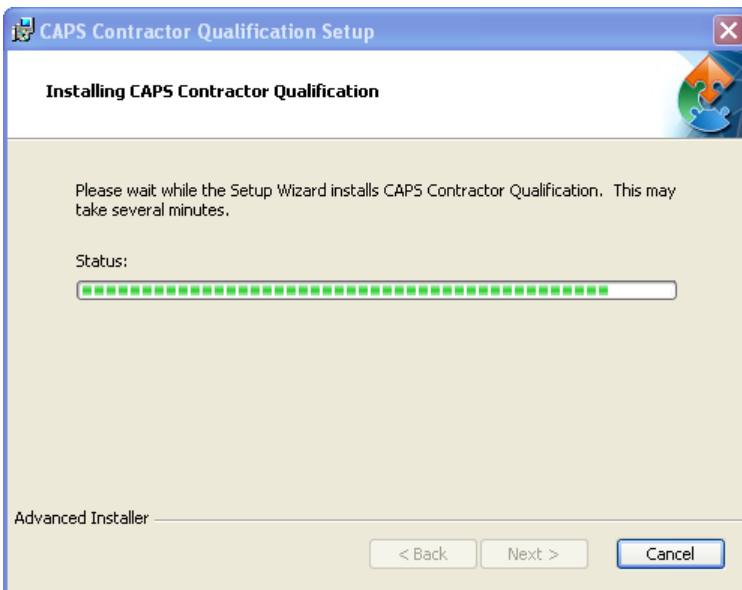


The screen shot to the left simply indicates that the Contractor Qualification Statement program will be installed in the SAME folder in which your CAPS program is currently installed. There should be NO NEED to change this location.

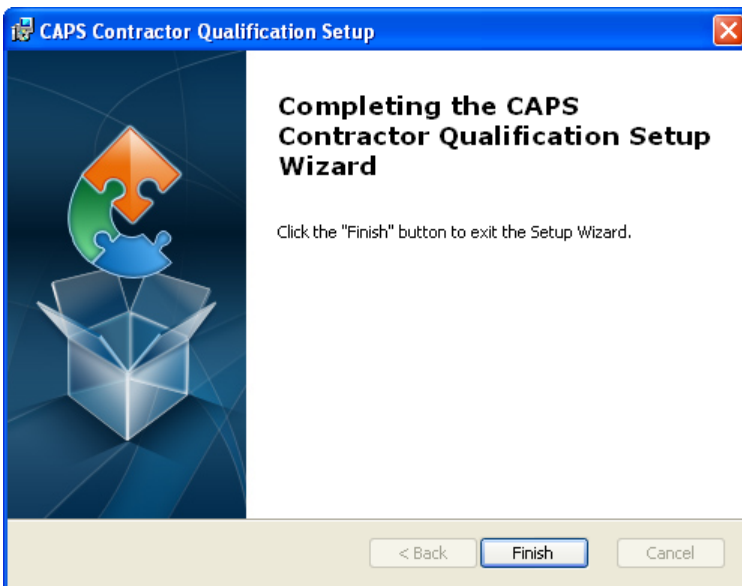
Click the Next button



At this window, click the Install button.



The window to the left simply provides an overall status of the installation











Click Finish when you are presented with the window shown at the left:

**On Windows XP you will need to close CAP and restart the program.**

## To generate a Contractors Qualification Statement

From the CAPS main File menu -> choose Qualification Statement.

<p>Setup</p>  <p>Submitting</p>  <p>Organization</p>  <p>Licensing</p>  <p>Experience</p>  <p>References</p>  <p>Financing</p>  <p>Signature</p>  <p>Create Word Document</p>	<p>Each icon on the left represents a different section of the Contractor's Qualification Statement which must be completed BEFORE you can actually create the completed document.</p> <p>Information that you enter in each section is saved and can be edited and/or updated as time goes on.</p>
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## SUBMITTING SECTION

This section contains basic information about who you are submitting the Qualification Statement to as well as basic information about your company – each item is explained below.

The screenshot shows the 'Contractor's Qualification' application window. The 'Submitting' section is active, as indicated by the red circle around the 'Submitting' icon in the sidebar. The main area contains the following fields and options:

- Submitted To:** Text input field.
- Address:** Text input field.
- Name of Project:** Text input field.
- Type of Work (file separate for for each Classification):** Radio button options for General Construction (selected), HVAC, Electrical, Plumbing, and Other -- Specify (with a text input field).
- Submitted By:** Text input field.
- Address:** Text input field containing "2378 Dane Hill Road", "West Charleston", and "VT, 05872".
- Principal Office:** Text input field.
- Corporate Structure:** Radio button options for Corporation (selected), Partnership, Individual, and Other -- Specify (with a text input field).

Buttons at the bottom include Save, Undo Changes, Exit, and Help.

- **Submitted To** – who you are submitting the Qualification Statement to
- **Address** – their address
- **Name of Project** - the project name as it relates to this submission
- **Type of Work** – what type of work will you be performing on this project – **NOTE** you will need to submit one Qualification Statement for EACH type of work you will be performing
- **Submitted By** – Your licensed CAPS company name will automatically appear on the final document with no additional effort on your part
- **Address** – your companies address, from your QuickBooks file -> Company Information. This address can be displayed as a single line or you can click into the box at the end of your street address -> and press the Enter Key to have your address display on two lines.
- **Principal Office** – the location of your principal office
- **Corporate Structure** – how is your business structured

When you have completed the information in the Submitting Preference be sure to click the SAVE button before moving onto the Organization section.

## ORGANIZATION SECTION

This section contains basic information about how your company is organized – each item is explained below.

The screenshot shows the 'Contractor's Qualification' application window. The 'Organization' section is active, with the 'Organization' icon highlighted in the left sidebar. The main area contains the following fields and instructions:

- Date opened for business?** (8/16/2000)
- Date opened for business under present name?** (8/16/2000)
- What former names has your organization operated?** (Text input field)
- Date of Incorporation, or creation** (8/16/2000)
- If your organization is a corporation answer the following:**
  - State of Incorporation
  - President's name
  - Vice-president's name(s)
  - Secretary's name
  - Treasurer's name
- If your organization is a partnership answer the following:**
  - Type of Partnership (if applicable)
  - Name of General Partners
- If your organization is individually owned answer the following:**
  - Name of Owner
- If your organization is other than those listed above, describe it and name the principals.** (Text input field)

Buttons at the bottom: Save, Undo Changes, Exit, Help.

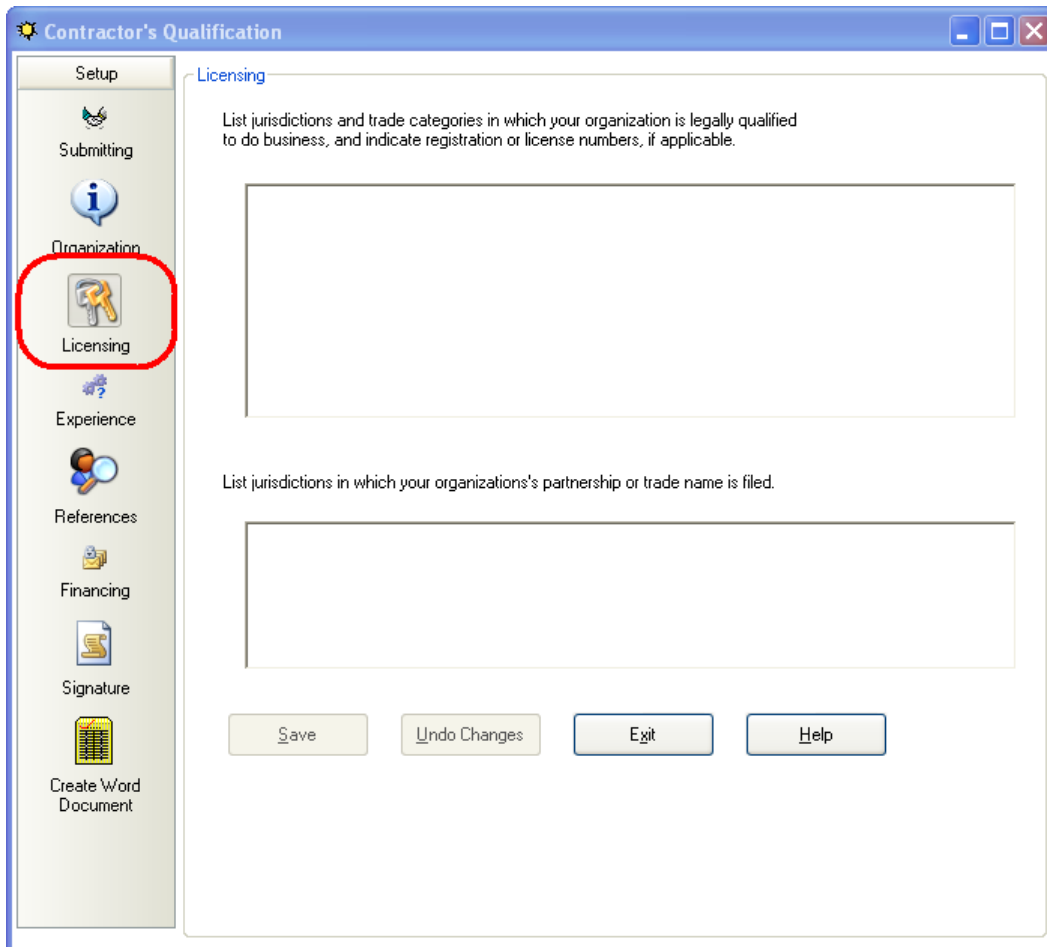
To move between the month, day, and year fields use your arrow keys.

- **Date opened for business** – enter the date that you opened your business
- **Date opened for business under present name** – enter the date that you opened your business under it's present name
- **What former names has your organization operated** – enter any other names that your business has operated under
- **Date of Incorporation, or creation** – enter the date that your business became incorporated or was created
- **State of Incorporation** – enter the name of the state that your business is incorporated in
- **President's name** – self explanatory
- **Vice-president's name(s)** – self explanatory
- **Secretary's name** – self explanatory
- **Treasurer's name** – self explanatory
- **Type of Partnership (if applicable)** – if your business is a Partnership, enter the partnership type in this field
- **Name of General Partners** – self explanatory
- **Name of Owner** – if your business is a Sole Proprietorship, enter the owners name in this field

- **If your organization is other than those listed above, denote it an name the principals** – if your business has any other formal entity structure than listed above – enter the business type and the name of the owners here.

## LICENSING SECTION

This section contains basic information about your company's licensing – each item is explained below.

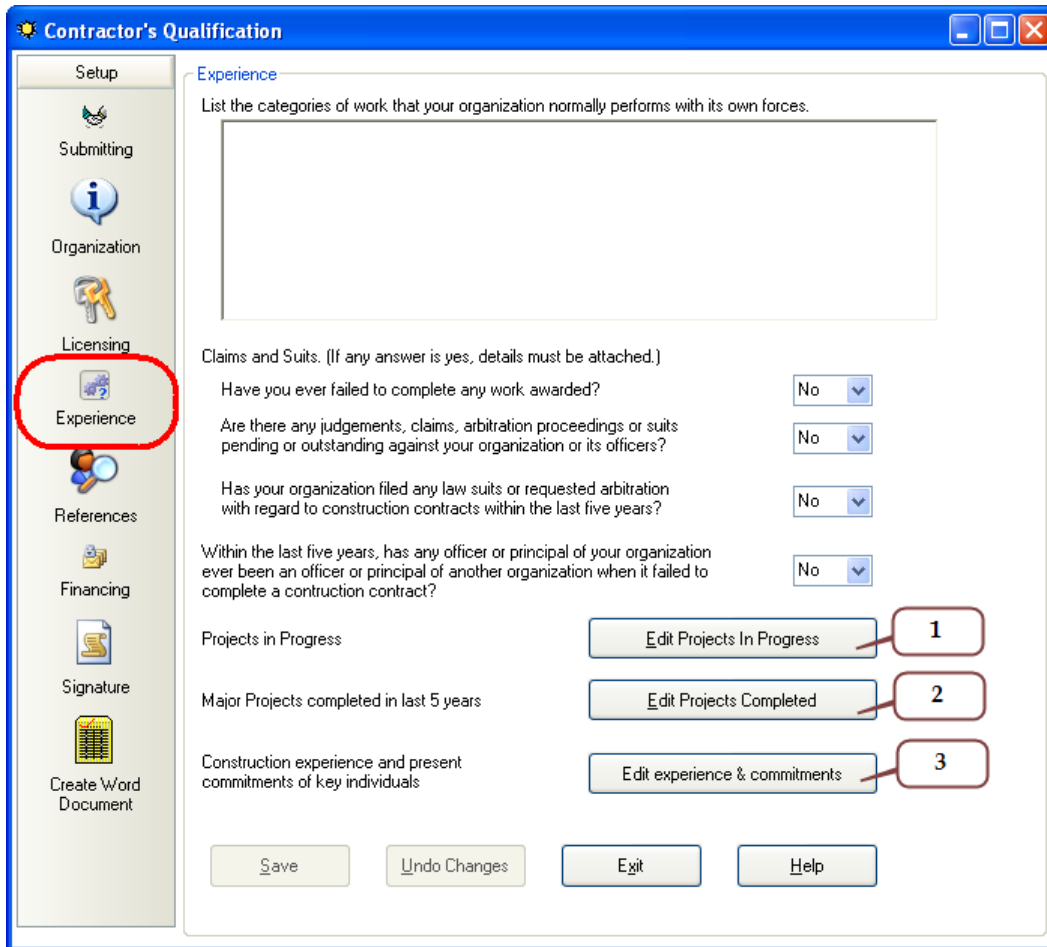


The screenshot shows a software window titled "Contractor's Qualification". On the left is a vertical navigation menu with icons and labels for: Setup, Submitting, Organization, Licensing (highlighted with a red circle), Experience, References, Financing, Signature, and Create Word Document. The main area is titled "Licensing" and contains two text input boxes. The first box is preceded by the text: "List jurisdictions and trade categories in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable." The second box is preceded by the text: "List jurisdictions in which your organizations's partnership or trade name is filed." At the bottom of the window are four buttons: Save, Undo Changes, Exit, and Help.

- In the first box you should list the jurisdictions and trade categories in which your business is legally qualified to do business, be sure to include registration or license number – if applicable
- In the second box you should list jurisdictions in which your businesses partnership or trade name is filed.

# EXPERIENCE SECTION

This section contains basic information about your company’s experience – each item is explained below.



- In the first box, list the categories of work that your business normally performs with its own workforce.
- Answer the next 4 questions about any claims or suits that your company has been involved in

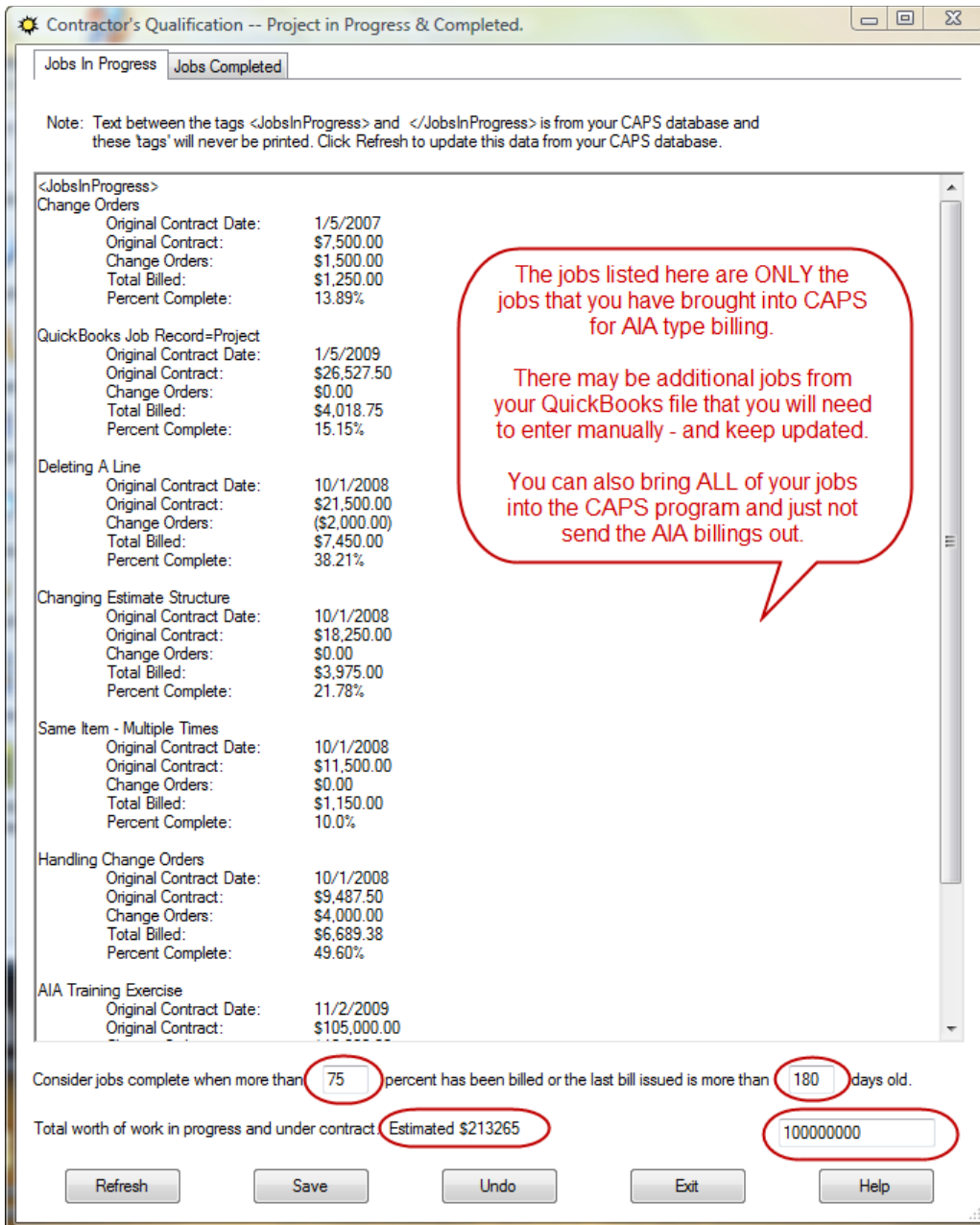
## 1. Edit Jobs in Progress button

The Jobs in Progress window will display information about the jobs that you have brought into CAPS for AIA type billing AFTER you click the Refresh button.

Jobs that exist in QuickBooks that you do not do AIA type billings for will have to be manually entered in this window – begin entering information about those other jobs AFTER the </JobsInProgress> tag.

You MUST manually update the value of Work In Progress and under contract.

You can set your own parameters for reporting Jobs as “Complete” by percentage and/or by when the last bill was issued.



You can set your own parameters for reporting Jobs as “Complete” by percentage and/or by when the last bill was issued.

You MUST manually enter the dollar value of Work in Progress & Under Contract – we do provide you with an “Estimated” value of the jobs in CAPS

Click the Refresh button to pull information about Jobs in Progress from the CAPS program.

Jobs in QuickBooks that are NOT in CAPS will NOT be included in this window – you will need to manually enter those jobs.

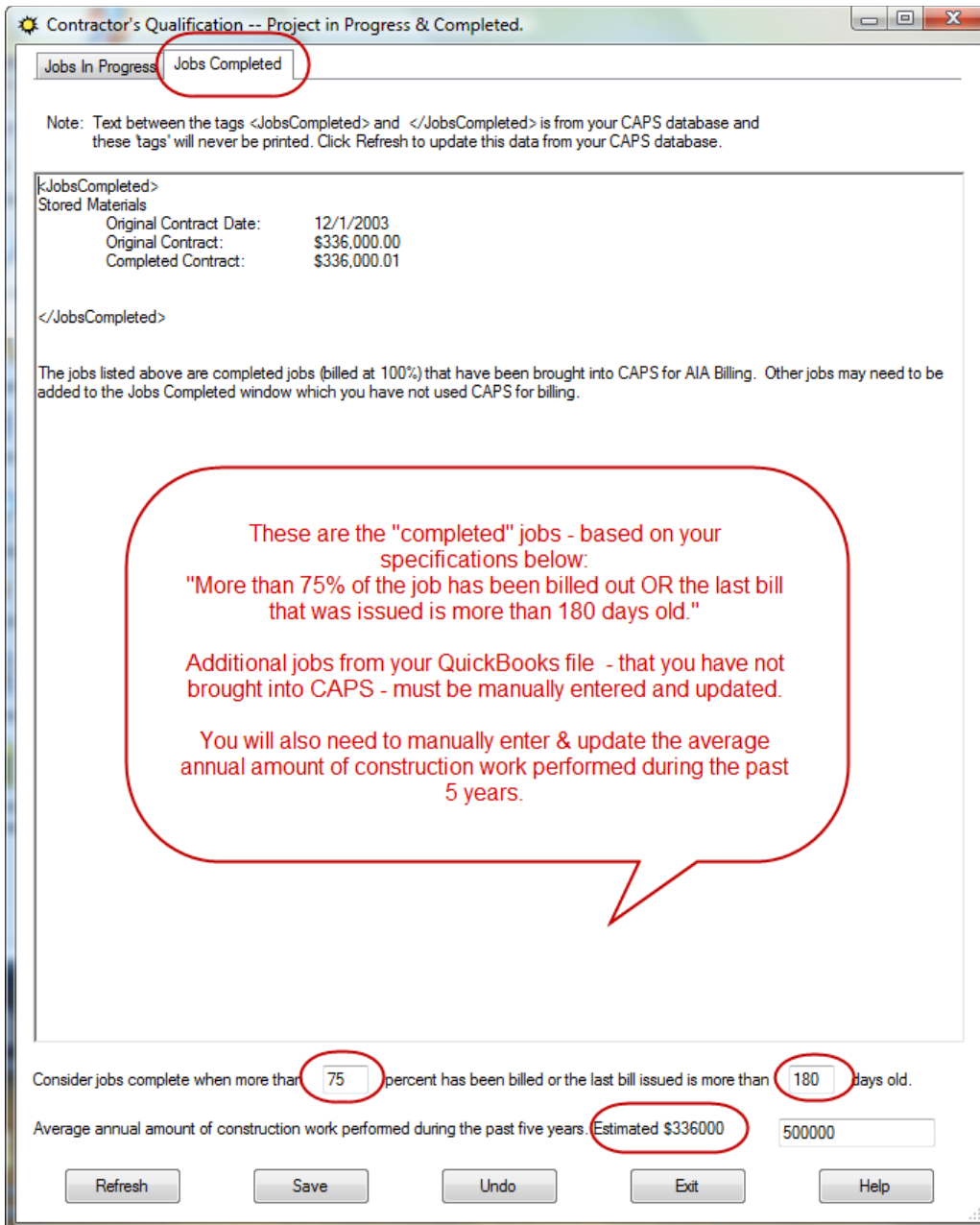
## 2. Edit Projects Completed button

You can set your own parameters for reporting Jobs as “Complete” by percentage and/or by when the last bill was issued. Once these parameters have been set and the Refresh button has been clicked, Jobs that fit the parameters you set that have been brought into CAPS for AIA type billing will appear in this list.

Other jobs that exist in QuickBooks, but have NOT been brought into CAPS for AIA billing WILL have to be MANUALLY entered. You can begin entering information about these jobs AFTER the </JobsCompleted> tag.

You MUST manually enter (and then update) the dollar value of the AVERAGE annual amount of construction work performed during the past five years.





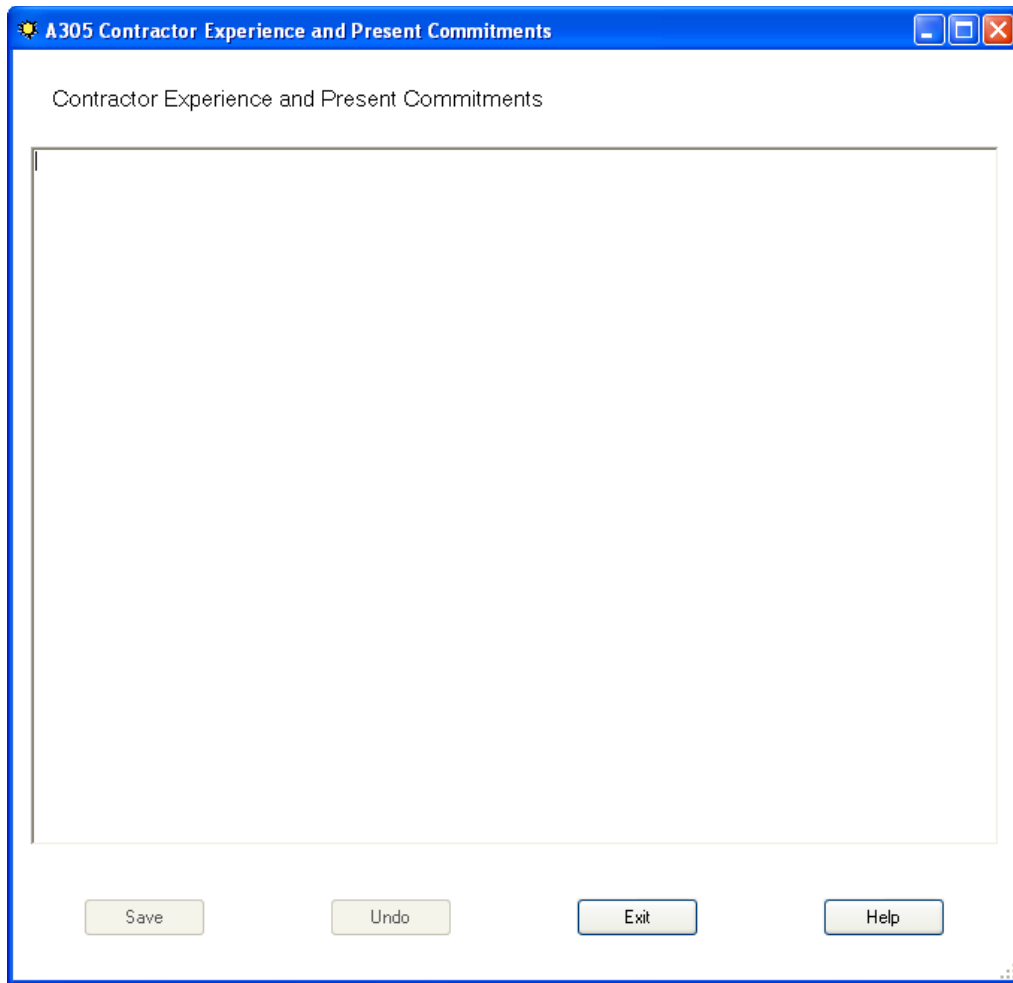
You MUST manually enter (and then update) the dollar value of the AVERAGE annual amount of construction work performed during the past five years.

Click the Refresh button to pull information about Jobs in Progress from the CAPS program.

Jobs in QuickBooks that are NOT in CAPS will NOT be included in this window – you will need to manually enter those jobs.

### 3. Edit experience & commitments button

In this window you can enter additional information about your experience and present commitments.



Use this window to enter information about your experience and present commitments.

# REFERENCES SECTION

In this section, enter information about your companies Trade References, Bank References, Boding Company and the Name & Address of your Bonding Agent.

The screenshot shows a software window titled "Contractor's Qualification" with a blue title bar. On the left is a vertical navigation menu with icons and labels: Setup, Submitting, Organization, Licensing, Experience, References (circled in red), Financing, Signature, and Create Word Document. The main area is titled "References" and contains three large text input boxes: "Trade References", "Bank References", and "Surety". Below the "Surety" box are two more text input boxes labeled "Name of bonding company" and "Name and address of agent". At the bottom of the main area are four buttons: "Save", "Undo Changes", "Exit", and "Help".

## FINANCING SECTION

The Financing section holds information about the financial records that you are submitting for you company, including who prepared them and the date that they were prepared.

**Contractor's Qualification**

Setup

Submitting

Organization

Licensing

Experience

References

**Financing**

Signature

Create Word Document

**Financing**

A financial statement must be attached.

Name and Address of firm preparing financial statement.

Date of Financial Statement: Friday, January 01, 2010

Is the attached financial statement for the identical organization named on page one? Yes

If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsidiary).

Will the organization whose financial statement is attached act as a guarantor of the contract for construction? Yes

Save Undo Changes Exit Help

## SIGNATURE SECTION

This window contains information about the person who is signing the Contractor Qualification Statement – **by default this information comes from the CAPS program -> System Setup menu -> Address & Default Information – Notary tab -> Representative and Representative Title fields.** You can change this default information here if you'd like.

The screenshot shows the 'Contractor's Qualification' application window. On the left is a vertical sidebar with icons and labels for various sections: Setup, Submitting, Organization, Licensing, Experience, References, Financing, Signature (highlighted with a red circle), and Create Word Document. The main area is titled 'Signature' and contains the following elements:

- Print & date "Dated at this..." with today's date (unchecked leave blank)
- By:
- Title:
- Print & date "Subscribed and sworn..." with today's date (unchecked leave blank)
- Buttons: Save, Undo Changes, Exit, Help

## CREATE WORD DOCUMENT

Click the Create Word Document button, sit back and wait for Word to respond – review, print, and save your document.

