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Construction Application for Payment Solution minimum permission settings for Enterprise 6.0 / 7.0 Users

The advanced permission setting in Enterprise 6.0 & 7.0 certainly can make a business owner feel more confident that only the people they really want to have access certain data are the only ones that will indeed be able to access it. However, we have seen many business owners get "carried away"----effectively stopping people from actually doing their job.

When granting Construction Application for Payment Solution access rights to you 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 and Various Contract Documents.

As the QuickBooks Administrator, Certified QuickBooks ProAdvisor, Accountant, IT Consultant, etc. setting up this program; please take the necessary time up front to make sure that the following permission setting exist – you can even create a new Role in QuickBooks called CPS if you would like and assign it to multiple people if you like. The time you spend now will save someone a call to Technical Support and perhaps eliminate the need to call you back into their office from an important meeting.

To ensure that the user has sufficient permissions from the QuickBooks **Company Menu**, select **User**s, and then **Set Up Users and Roles**. In the **User List tab**, click on the **name of the user** to **view the Roles** assigned to this user. Select the **Role List Tab** and then press the **Edit** Button.

NOTE: You may also create a New Role called CAPS, if you prefer.

Following are the **minimum** permissions required to retrieve paycheck and time sheet information from QuickBooks.

These permissions will allow a user to use CAPS to retrieve Estimate & Progress Billing Information from the QuickBooks file and other data required to create various contract documents. It does not necessarily allow them to actually create the Estimate or Progress Invoice itself in QuickBooks.

Select **Centers** and expand the Activities by clicking on the **+ sign**

1. Click on the **Customer Center** and expand the list by clicking on the **+ sign**. Select **Partial Access**, **View List, Modify Entries, Print List, and View Balance**.
2. Click on the **Employee Center** and expand the list by clicking on the **+ sign**. Select **Partial Access, View List, and Print List**
3. Click on the **Vendor Center** and expand the list by clicking on the **+ sign**. Select **Partial Access, View List, Print List, and View Balance.**

Select the **Company** Area and expand the list by clicking on the **+ sign**. Select **Company Information** and grant **Full Activity Access** to **View** and **Modify**.

Select the **Customers & Receivables** Area and expand the list by clicking on the **+ sign**.

1. Select **Accounts Receivable Accounts** and grant **Full Access** to **View** and **Print**
2. Select **Estimates** and grant **Partial Access** to **View, Create, Modify**, and **Print**
3. Select **Invoices** and grant **Partial Access** to **View, Create, Modify,** and **Print**
4. Select **Receive Payments** and grant **Partial Acces**s to **View**

Select the **Employees & Payroll** Area and expand the list by clicking on the **+ sign**. Select **Paychecks** and grant **Partial Access** to **View**.

Select the **Lists Area** and expand the list by clicking on the **+ sign**. Click on **Customer & Vendor Profile Lists** and expand the list by clicking on the + sign.

1. Select **Customer Message List** and grant **Partial Access to View List** and **Print List**
2. Select **Customer Type List** and grant **Partial Access** to **View List**, **Modify Entries**, and **Print List**
3. Select **Job Type List** and grant **Partial Access** to **View List, Modify Entries**, and **Print List**
4. Select **Payment Method List** and grant **Partial Access** to **View List** and **Print List**
5. Select **Terms List** and grant **Partial Access** to **View Lists**, **Modify Entries,** and **Print Lists**
6. Select **Vendor Type List** and grant **Partial Access** to **View List** and **Print List**

Click on the **Item List** and grant **Partial Access** to **View List** and **Print List**

Click on the **Reports** section and expand the list by clicking on the **+ sign**.

1. Select **Customers & Receivables** and grant **Full Access** to **View** and **Print**
2. Click on **Jobs** and expand the list by clicking on the **+ sign**
    a. Click on **Jobs Detail** and grant **Full Access** to **View** and **Print**
    b. Click on **Jobs Summary** and grant **Full Access** to **View** and **Print**