

PROADVISOR review

Construction Application for Payment Solution version 5.0 by Sunburst Software Solutions, Inc.

Overall Rating **9.0**



Product Name

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Reviewed By

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Date Reviewed

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Summary

Construction Application for Payment Solution was released by Sunburst Software Solutions in 2002 to complement their line of innovative and time-saving products designed to add power and functionality to QuickBooks. CAPS, as called by its developer, automates the task of generating the American Institute of Architects required percentage of completion billing application for payment forms. Not available as a stand-alone product, it integrates specifically with QuickBooks Pro/Premier 2002-2007 and Enterprise edition 1.0-7.0.

CAPS works by creating linked records to store information about a job that QuickBooks has no way of tracking. Then, by extracting data contained in the QuickBooks customer job record, estimate, and progress invoices, it can produce the AIA reports for printing either on plain paper (with Excel) or on preprinted forms G-702 and G-703.

Strengths

- One of the product's greatest strengths is the wealth of available options for training and technical support. Backed by a knowledgeable staff with over 50 years of combined experience working in the construction and software development industry, Sunburst Software Solutions has created both on-line and written documentation for their customers. They even go a step further by providing suggestions for optimizing QuickBooks performance for users in the construction industry.
- CAPS accesses the QuickBooks file on a read-only basis so the user can feel confident that their data is safe from modification.
- Also included is the Contract Document Manager which can generate 30+ common construction forms such as lien waivers and releases by merging QuickBooks or CAPS information into specified data fields within Microsoft Word. The standard templates can be modified and customized and new forms can also be created.

Limitations

- The main limitation of the product is the time required to properly configure a QuickBooks file to integrate smoothly with CAPS. When using an outside estimator program that does not provide a QuickBooks interface, the estimate has to be entered into QuickBooks before CAPS can work.

- The lack of bi-directional data sharing means that retainage billing prepared in CAPS must also be entered separately in the QuickBooks file. Due to the various methods for tracking retainage, the developers have opted not to add this functionality at this time.

Wish List

A few of the items I would like to see considered for future program releases are:

- The ability to filter out progress invoices that have already been retrieved by CAPS for a particular date range. This would prevent the invoice from showing up again in the payment reconciliation window and could help eliminate any confusion over which items have already been processed.
- The addition of user log-ins with password protection.
- Automatic program updates. Right now the user is required to manually update the software after receiving an e-mail notification that an update is available. If one user updates their workstation and another user fails to do the same, then the data can be corrupted and will have to be restored.

Product Ratings	Rating	Ratings Definitions
<p>Setup and Installation:</p> <p>Whether the product is purchased on CD or by download, the InstallShield® Wizard will walk you through the process. Before the installation begins, you are prompted to take the Flash training presentation. I also strongly recommend the new Audio/Video training available on the company's website. After installation is complete, the basic company options are setup within CAPS.</p> <p>Overall, the installation and initial setup of CAPS is very straight-forward and can be accomplished in a matter of minutes.</p>	9.5	<p>10.0 (Perfect): This exceedingly rare score is reserved for a product that is as perfect as it could be.</p> <p>9.0 to 9.9 (Spectacular): A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.</p> <p>8.0 to 8.9 (Excellent): A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.</p>
<p>Interface:</p> <p>Since the program focuses on performance rather than presentation, you won't find any icons or unnecessary graphics that might potentially slow the system down. The program's menus are logically organized and access to program help is available by clicking the ? icon displayed on each screen.</p>	9.0	<p>7.0 to 7.9 (Very good): While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.</p>
<p>Features:</p> <ul style="list-style-type: none"> • By automating the application for payment process, the potential for data-entry errors is reduced and virtually eliminated. Since valuable time is saved by using data that already exists in the QuickBooks file, the contractor can potentially get paid faster. • CAPS also allows you to select if you would like to add a menu to the customer menu in QuickBooks so that switching between the two programs is faster. Additionally, you can opt to have CAPS notify you when job data changes or a new job is added in QuickBooks. • The ability to print to plain paper via Excel can save money as well as valuable time by not having to feed preprinted forms into your printer. • Included with the purchase of the program is the Contract Document Manager that can generate 30+ additional forms commonly used in the construction industry. 	9.0	<p>6.0 to 6.9 (Good): This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.</p> <p>5.0 to 5.9 (Average): A product that scores in this range is functional but unremarkable.</p> <p>4.0 to 4.9 (Mediocre): Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.</p> <p>3.0 to 3.9 (Poor): A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.</p>
<p>Ease of Use/Service and Support</p> <p>By following the CAPS recommended system of accounting within QuickBooks, I had little trouble automating the application for payment process. The main difficulty I encountered was getting my QuickBooks file setup so that the data could be extracted properly. Some users may find they have to change the way they account for change orders and even their retainage.</p> <p>There is no shortage of options for service and support. Although the manual can be a bit intimidating, it is designed to offer help for almost any situation that might be encountered when using the program. The addition of the audio/video training on the website is a great way to become familiar with the product and its basic functions. The company offers a new user 30 minutes of technical support with purchase of the software. Additional support can be purchased, and an annual maintenance contract includes product updates as well as two technical support incidents. The company's website contains product specific help, a construction industry newsletter, and a free on-line user forum. Phone support is available Monday through Friday from 8-6 EST.</p>	9.0	<p>2.0 to 2.9 (Terrible): A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.</p> <p>1.0 to 1.9 (Abysmal): A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.</p>



QuickBooks®

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9.0

Data Security / Privacy

CAPS accesses QuickBooks on a read-only basis which helps to protect the data file from unintended alterations. The program also offers an enhanced backup and restore feature to further safe-guard its database files.

Since the program lacks password protection, it can be accessed by anyone using the workstation.

A well documented privacy policy exists on the company's website and may be viewed at

http://sunburstsoftwaresolutions.com/privacy_policy.htm.

7.9

Integration with QuickBooks

CAPS is designed specifically for use with QuickBooks; so, if you follow a few recommended accounting procedures from the developers, the integration is seamless. The availability of a menu addition to your QuickBooks data file can further enhance the performance.

9.5
