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Construction Application for Payment Solution - Version 5 to Version 6 Conversion

This document has been provided as a courtesy to all customers to give to their IT people. If you are an IT person or IT Company supporting one of our customers, please follow the instructions outlined here, as they provide an overview of all the steps in detail.

The conversion process is quite simple, the new CAPS Version 6 program is going to automatically do 95% of the entire conversion process automatically. Seriously, you'll only need to click a few buttons, maybe copy some files, help them connect V6 version to QuickBooks, maybe manually copy some Lien Waiver & Release forms they've customized, and then uninstall the CAPS Version 5 program once they are satisfied that all their data has converted.

If you call us to walk you through the conversion, this becomes a billable service to the customer or to you.

This document contains the following information:

- Know where your clients CAPS Version 5 Data and backups are - (found below)
- Conversion process for a single CAPS user with a single or multiple CAPS Company Licenses - (page 2).
- Overview of the CAPS Directory file structure (page 7)
- Manually copying customized Contract Document files from CAPS Version 5 to Version 6 (page 8)
- Granting Permissions in QuickBooks for CAPS Version 6 to access QuickBooks data (page 8)
- Conversion process for multiple CAPS users with a single or multiple CAPS Licenses - (page 9)
- Uninstalling CAPS version 5 when the client is satisfied that all jobs and contract documents have been moved to Version 6 (page 10)

Know where your clients CAPS Version 5 Data and backups are.

It's quite easy to find this information, it's all stored within the CAPS program.

To find the location of the CAPS Version 5 data:

Start the CAPS Version 5 program on your client's computer.

Go to the System Setup menu → Data Locations. This window will tell you the location of:

- The CAPS Data Path - where all of the CAPS Data resides on either their computer or a server.
- The QuickBooks File location and the name of the QuickBooks file being used.

- X
- X

Clicking into any of these fields and pressing the F5 key will open that folder location.

Find the location of CAPS Backups.

Go to the CAPS Backup & Restore menu → Enhanced Backup of CAPS data, the location of CAPS backups is displayed.

This location should NOT be: C:\Users\Public\Documents\Sunburst\Cap\Data\Cap Backups.

- If the folder location includes Cap\Data, then the client has not only been backing up their CAPS data but their old backups as well.
- Immediately create a new CAPS backup folder (this can be their local computer, on an external hard drive that's always connected to their computer, a server, or even a cloud drive).
- Use the Browse for Backup Folder button to navigate to and select the new backup folder.
- Make sure that the option to Make a backup every time I exit Cap on this PC is checked.
- Click the Apply button and then the Backup button.
- Click Yes to view the contents of the Backup Folder and rename this backup to include V5.

Conversion process for a single CAPS user with a single OR multiple CAPS Company Licenses.

From the current CAPS program

- Go to the Help menu → Check for Updates
- From the Web Service Center, click the Download Current CAPS Setup/Installation button.

Download Current CAP Setup / Installation

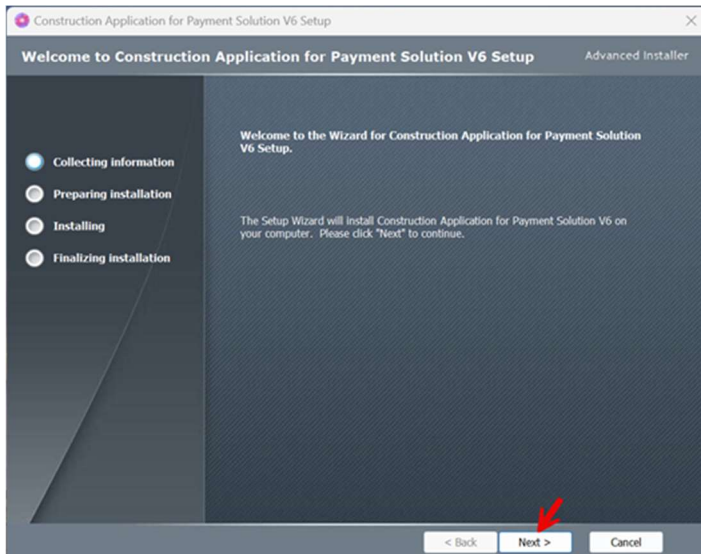
Choose “Open” or “Save As”

Locate the “setup” and double-click the executable.

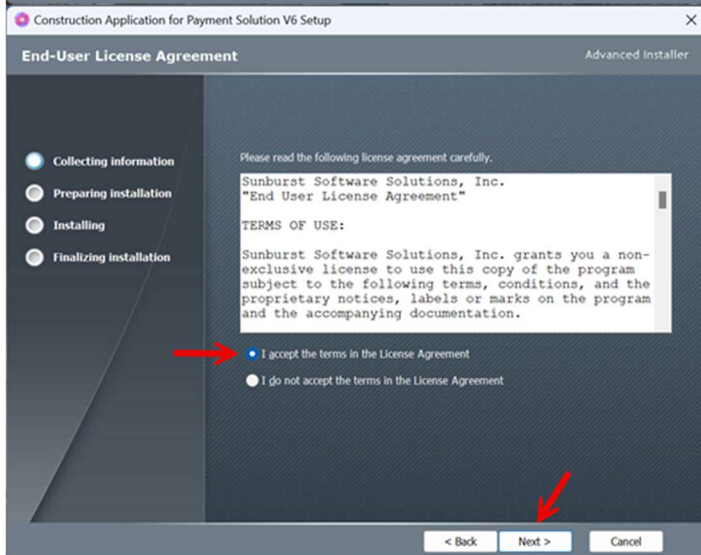


CapSetup

Which launches the Setup Wizard.

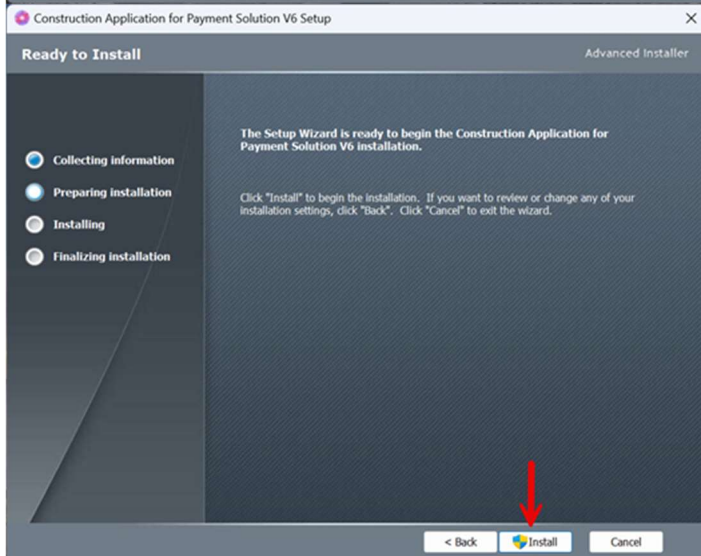


Click Next



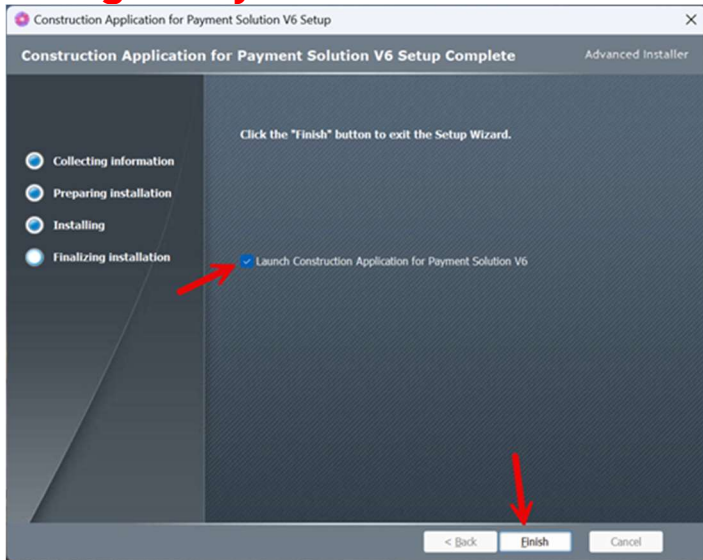
Accept the License Agreement.

Click Next.



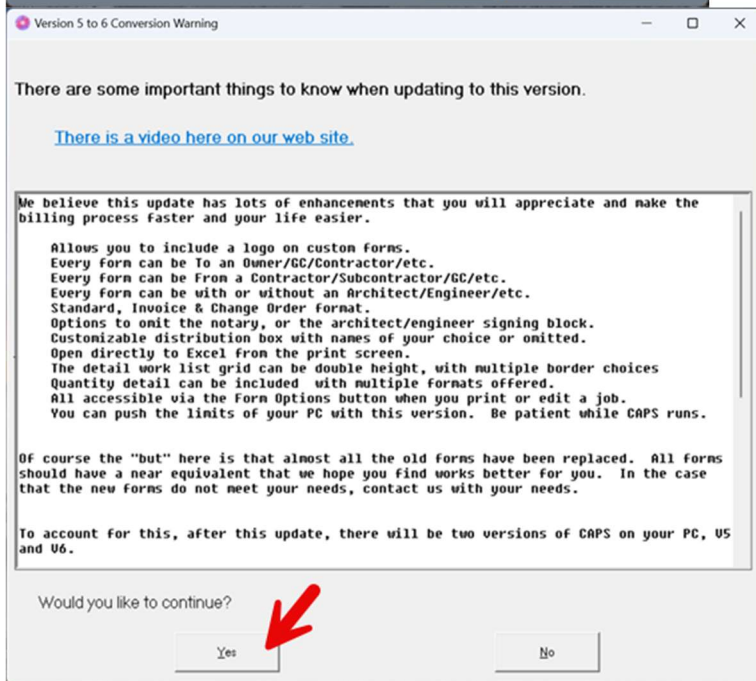
Click Install.

Choose YES when prompted to “Allow this program to make changes to your device”



Click the “Launch Construction Application for Payment Solution V6” option.

Click Finish.



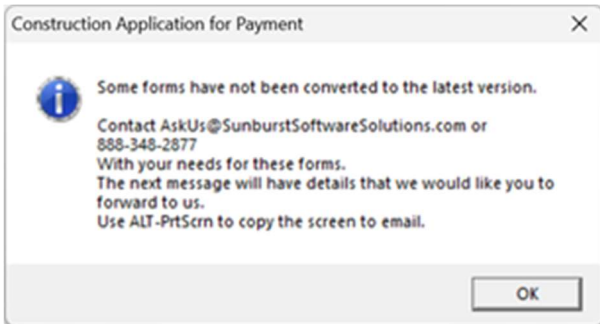
Read the warning or watch the first 10 minutes of the video that is linked here.

The conversion process may take some time, especially if the customer has multiple company licenses or 20 years of data in their CAPS Version 5 program.

Just be patient.

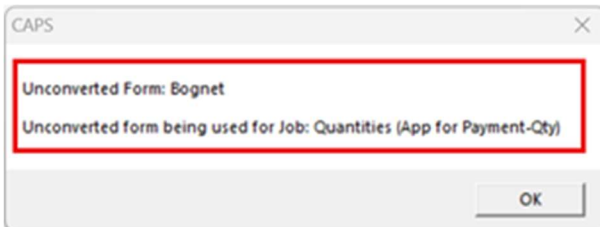
Do NOT use task manager to “kill” the process.

If the client has multiple CAPS Licenses/Companies, or users - ALL licenses/companies/users are converted at the same time.



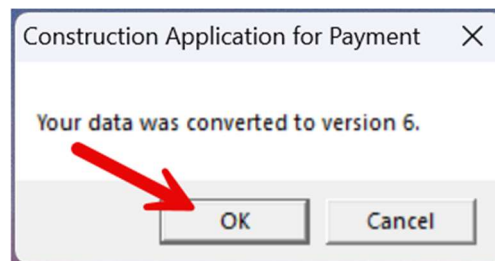
If any forms were not converted, you'll receive a list of form names that were **NOT** converted and the names of the jobs that were assigned to this form.

SAVE this list and forward it to AskUs@SunburstSoftwareSolutions.com

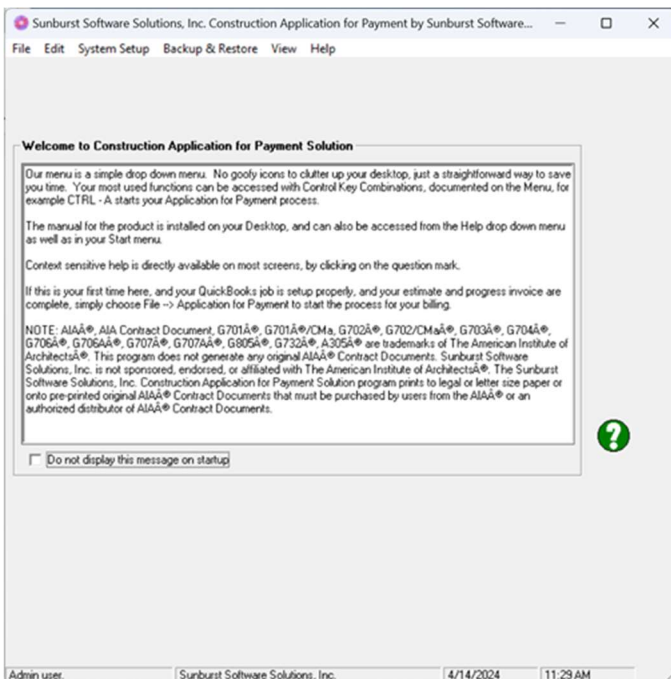


If all forms were converted successfully, you'll receive this message.

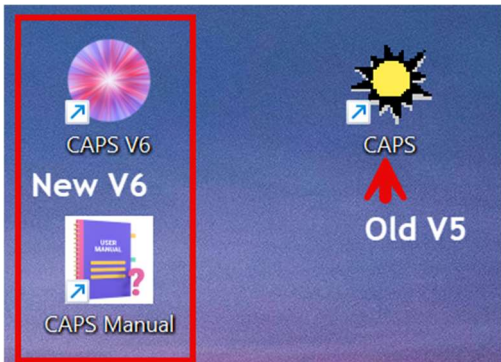
Click OK.



CAPS Version 6 will launch.



Both CAPS Version 6 and Version 5 are now installed on the user's computer.



This allows users to verify that all data transferred correctly to the new CAPS Version 6 program.

Urge them to open both CAPS Version 6 and Version 5, going to the Edit menu → choosing Jobs and verify that all their jobs transferred over to Version 6.

Sunburst Software Solutions, Inc. Construction Application for Payment by Sunburst Software...

File Edit System Setup Backup & Restore View Help

Construction Application For Payment Job Maintenance & History

Name	Project #s	Contract Amount	Contract Date
Jim & Sue Durand (HUD form)	F N/A, S N/A, A-9985...	\$38,572.00	12/01/2014
QB Job Record-Project (Invoice Form)	Fed. State, Arch Project	\$479,006.95	12/05/2013
Quantities (App for Payment-Qty)	F-9998865, S-9998865...	\$8,983.70	12/20/2023
Retainage Receivable (Sales Tax)	F-99985211, S-999852...	\$25,727.79	02/01/2018
Training Exercise (NY/NJ Port form)	F-3321556, S-332155...	\$68,885.00	03/03/2014

CAPS Version 6

Omit Finished Jobs

History Edit Print Delete Exit

Sunburst Software Solutions, Inc. Construction Application for Payment by Sunburst Software...

File Edit System Setup Backup & Restore View Help

Construction Application For Payment Job Maintenance & History

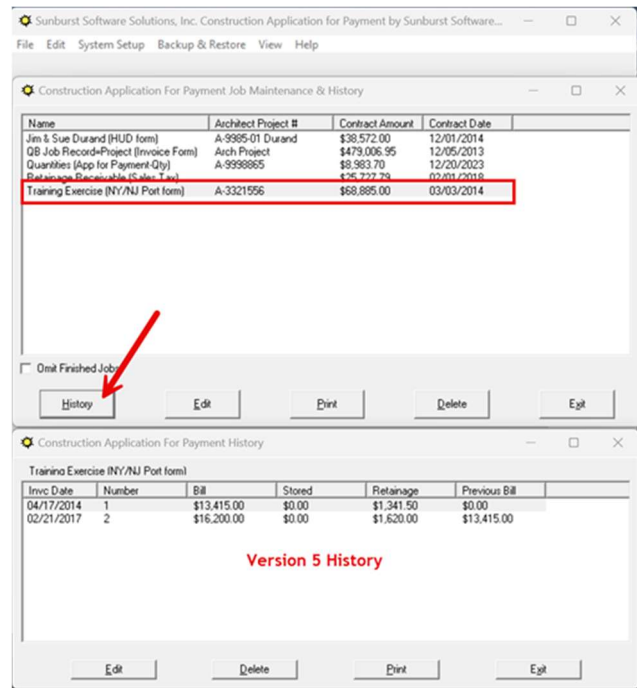
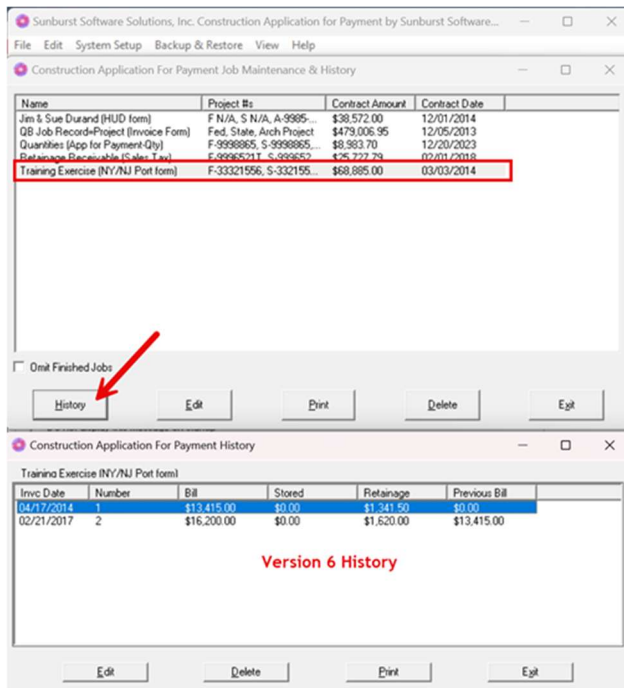
Name	Architect Project #	Contract Amount	Contract Date
Jim & Sue Durand (HUD form)	A-9985-01 Durand	\$38,572.00	12/01/2014
QB Job Record-Project (Invoice Form)	Arch Project	\$479,006.95	12/05/2013
Quantities (App for Payment-Qty)	A-9998865	\$8,983.70	12/20/2023
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CAPS Version 5

Omit Finished Jobs

History Edit Print Delete Exit

Have them select one or each job and make sure that the History is correct.



Please stress to your client that this conversion is a one-time process and that from this point forward they should only use Version 6 to run their pay apps. Any new pay apps that are brought into Version 5 will not exist in Version 6 and vice versa.

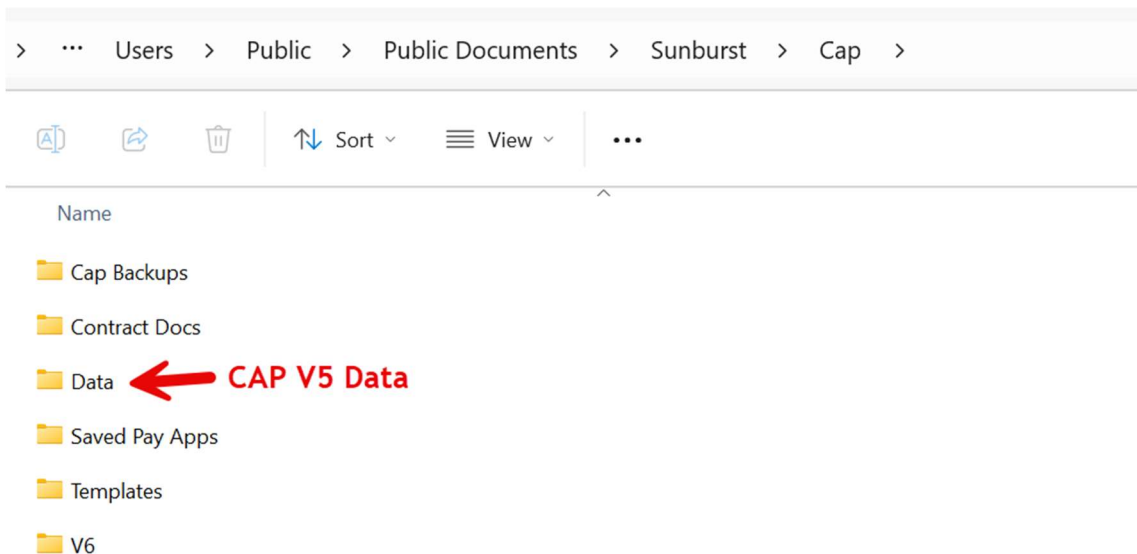
CAPS DIRECTORY FILE STRUCTURE

All CAPS Data is in C:\Users\Public\Documents\Sunburst\Cap as it always has been.

You can get there quickly by going to the CAPS Version 6, System Setup menu → Data Locations → click into the CAPS Path field → press F5.

Version 5 and Version 6 will now each have their own database.

The original Version 5 information is stored in the folder called **Data**.



Manually copying customized Contract Document files from CAPS Version 5 to Version 6

Ask your client if they have **CUSTOMIZED** any of the Contract Documents in the CAPS Version 5.0 Contract Documents. If they have, you'll need to:

- Find out which Contract Documents they've customized (CAPS Version 5, File menu → Contract Document Manager to display a complete list of Contract Documents available)
- Then copy those files **from** C:\Users\Public\Documents\Sunburst\Cap\Data\Letters to C:\Users\Public\Documents\Sunburst\Cap\Templates

NOTE: Visible file names are similar to the template file names you'll need to copy.

Granting Permissions for CAPS Version 6 to access QuickBooks Data

For the last couple of years, there has been a “permissions bug” that causes problems when granting permissions for CAPS to access QuickBooks data. Intuit says that it is a “Windows” permissions bug, but we aren't so sure.

You or your client have probably run into it and have gotten the dreaded 80040408 - Could Not Start QuickBooks error. We're going to bypass that error - I hope. There's no consistent fix for this, but rather a lot of trial and error. I've run into this problem on this computer numerous times - especially after a QuickBooks update.

Follow these instructions.

- Exit QuickBooks.
- Exit CAPS Version 6 & 5.
- Right click on the QuickBooks icon and choose “Run as Administrator”.

- Log into QuickBooks in single-user mode as the QuickBooks Administrator.
- Right click on the CAPS Version 6 icon and choose Run as Administrator.
- From the CAPS System Setup menu → Data Locations.
- DELETE the information in the **QuickBooks File** block.
- Next, click the **Test QB Connection** button. (CAPS will go out and find the location of the open QuickBooks file).
- A QuickBooks - Application Certificate window will pop up (it may be hidden behind other things if everything is open in full-screen mode)
- Choose the last option “**Yes, always; allow access even if QuickBooks is not running.**”
- A Construction Application for Payment - Authorization window will display, click Yes.
- From the “**Login As**” drop-down menu, choose this user.
- From the Access Confirmation window, click Done.
- From the CAPS Data Locations screen, click OK.
- Exit CAPS.
- Exit QuickBooks.

QuickBooks and CAPS should now be able to be run without being run as the Administrator.

Conversion process for multiple Users with OR without multiple CAPS licenses.

If CAPS Version 5 has been networked and the full program has been installed on the server - OR one computer acts as the server - the full conversion process outlined under **Conversion process for a single CAPS user with a single OR multiple CAPS Licenses** (on page 2) should **FIRST** be done on the server or that main computer.

The CAPS Version 6 program will need to be installed on each user user’s computer (or under each user’s profile).

Additional PC’s will display the “Conversion Text Warning” but then it will recognize that there is a “V6” folder in the CAPS path, so it does no conversion and takes them directly to the CAPS home screen.

Manually copying customized Contract Document files from CAPS Version 5 to Version 6 (page 8) will only need to be done once on the “server” machine.

QuickBooks permissions (page 8) need to be granted for each user.

Uninstalling CAPS Version 5 (below) will need to be done on each user computer or profile.

Uninstalling CAPS Version 5 when the client is satisfied that all jobs, job history, and contract documents have been moved to Version 6.

Simply uninstall CAPS Version 5 from each computer and delete the Version 5 data folder from either their local computer or from the server.

