

# Setting up vendors

**Goal:** Set up your vendors in Ajera so you can use them in your daily work.

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In this quick lesson, you will learn how to:

- Enter general information about the vendor.
- Record 1099 information related to the vendor.
- Enter insurance-related information for the vendor.
- Reference key contacts.

## Step 1: Enter general information

1. Select **Setup > Vendors**.  
A list appears of all the vendors you created so far.
2. Click the **New** button.
3. Begin by entering some general information about the vendor.

Name	Vendor Type
AOP	General Office
American Express	Credit Card
BVA Group	Electrical Consultant
Christopher E. Meehan	Employee
CNC Insurance Company	Insurance
Davis Properties	General Office
Elmerco Engineering	Electrical Consultant
Fortis, CPA	Professional Services
Global Blueprinting	General Office
James N. Singer	Employee
Jan J. Engstrom	Employee
Kris N. Kingsley	Employee
Lewis Consultants	Mechanical Consultant
Mark A. Royce	Employee
Mary T. Boyle	Employee
Northwest Power Supply	General Office
Pat D. Hill	Employee
Paul J. French	Employee
...	...

Enter the vendor's name.  
It appears on checks, 1099 forms, reports, and selection lists.

Select the vendor type.  
Vendor types are used to group similar vendors together for reporting purposes.

For example, one of your firm's key issues is managing consultant contracts. Because this vendor has a vendor type of consultant, it is included on the Consultant Management and Consultant Pay When Paid reports.  
You set up vendor types in [Setup > Vendor Types](#).

Vendor - BVA Group

Status: Active

General | Address | 1099 Info | Insurance | Contacts | Custom Fields | Attachments | Notes

Name: BVA Group

Vendor type: Electrical Consultant

Department: [Empty]

Account: [Empty]

Date established: [Empty]

Calculate payment date by: Number of days

Number of days from invoice date: 30

Day of the month to pay: 0

Phone Numbers

Business: [Empty]

Business fax: [Empty]

Buttons: Close, Save, Cancel, Delete, Help

### Step 1: Enter general information (continued)

4. Continue entering general information about the vendor.

For aJeraComplete or the Departments add-on only.

The Department field appears only if you selected to use departments in Company > Preferences.

If you want a department to appear on an invoice distribution for nonproject entries, select it in this field. You can change it on the vendor invoice.

Enter the account that you want to appear on an invoice distribution for nonproject entries. You can change it, if needed, on each vendor invoice.

Enter the date you started doing business with the vendor.

You can specify the payment date for the vendor as either the number of days from the invoice date or a specific day of the month.

Enter this general contact information.

The screenshot shows the 'Vendor - BVA Group' form with the following fields and values:

- Status: Active
- General tab selected
- Name: BVA Group
- Vendor type: Electrical Consultant
- Department: (empty)
- Account: (empty)
- Date established: (empty)
- Calculate payment date by: Number of days
- Number of days from invoice date: 30
- Day of the month to pay: 0
- Phone Numbers section:
  - 503-451-5580 Business
  - (empty)
  - (empty)
  - 503-451-5582 Business fax
- Email: (empty)
- Website: www.bvagroup.com

Buttons at the bottom: Close, Save, Cancel, Delete.

## Step 2: Enter the vendor's address

Click the **Address** tab, and enter the address information.

The vendor's mailing address prints on Accounts Payable checks.

## Step 3: Enter 1099 information

1. Click the **1099 Info** tab and complete the information for the vendors to whom you send a 1099 form.

The screenshot shows the 'Vendor - BVA Group' window with the '1099 Info' tab selected. The window title is 'Vendor - BVA Group' and the status is 'Active'. The tabs are 'General', 'Address', '1099 Info', 'Insurance', 'Contacts', and 'Custom'. The '1099 Info' tab contains the following fields and callouts:

- Receives 1099 form:** A checked checkbox. Callout: "Select this check box."
- Form type:** A dropdown menu set to 'Nonemployee compensation'. Callout: "Enter the type of 1099 form that you send to the vendor. If you need to print more than one type of 1099 form for a vendor, set up a separate vendor for each 1099 form type that the vendor requires."
- Recipient ID:** A text field containing '93-1239877'. Callout: "Enter the vendor's tax ID number. This is usually the Social Security number or Federal ID."
- Recipient name:** An empty text field. Callout: "Ajera automatically prints the vendor name you entered on the General tab in the recipient's name box on the 1099 form. If you enter a name here, Ajera prints it on the first line. On the second line, it prints the vendor name prefaced with DBA. For example, the Vendor Name is Meier Consultants and the Recipient Name is Bill Meier. The 1099 form Recipient's name box contains:  
Bill Meier  
DBA Meier Consulting"
- 1099 Override:** A section with 'Reported amount' and 'Federal tax withheld' both set to '0.00'.
- W9 form received:** A checked checkbox.
- W9 business type:** A dropdown menu set to 'Individual/Sole Proprietorship'.
- W9 other description:** An empty text field.

At the bottom right of the window is a 'Help' button.

### Step 3: Enter 1099 information (continued)

2. Continue entering 1099 information for the vendor.

The screenshot shows the 'Vendor - BVA Group' window with the '1099 Info' tab selected. The status is 'Active'. The form includes the following fields and callouts:

- Receives 1099 form:** A checked checkbox. Callout: "If you received a W-9 from the vendor, select this check box. This form is a request for the vendor's tax ID number and certification."
- Form type:** A dropdown menu set to 'Nonemployee compensation'. Callout: "If you want to print a specific amount on the 1099 form for this vendor instead of the amount Ajera automatically calculates, type it here."
- Recipient ID:** A text field containing '93-1239877'.
- Recipient name:** An empty text field.
- 1099 Override:** A section containing:
  - Reported amount:** A dropdown menu set to '0.00'. Callout: "If you want to print a specific amount for federal income tax withheld on the 1099 form for this vendor, type it here."
  - Federal tax withheld:** A dropdown menu set to '0.00'.
- W9 form received:** An unchecked checkbox.
- W9 business type:** A dropdown menu set to 'Individual/Sole Proprietor'. Callout: "In the W9 Business Type field, select the vendor's type of business. If you select Other, type the vendor's business type in the W9 Other Description field."
- W9 other description:** An empty text field.

At the bottom of the window are buttons for 'Cancel', 'Delete', and 'Help'.

## Step 4: Enter insurance information

The Insurance tab appears for vendors set up with a vendor type (Setup > Vendor Types) that has the Consultant check box selected. You use it to verify that your consultant's insurance policies provide adequate coverage for the project work performed.

Click the **Insurance** tab, and enter information about the vendor's insurance.

Type	Proof Required	Company Name	Policy Number	Policy Limit	Effective	Expires
General Liability	<input checked="" type="checkbox"/>	American Insurance	877-3455621-01	1,000,000	06/03/10	06/03/11
Automobile	<input checked="" type="checkbox"/>	State Farm Insurance	8876-32322-990	0	05/03/10	05/03/11
*						

Select the type of insurance.

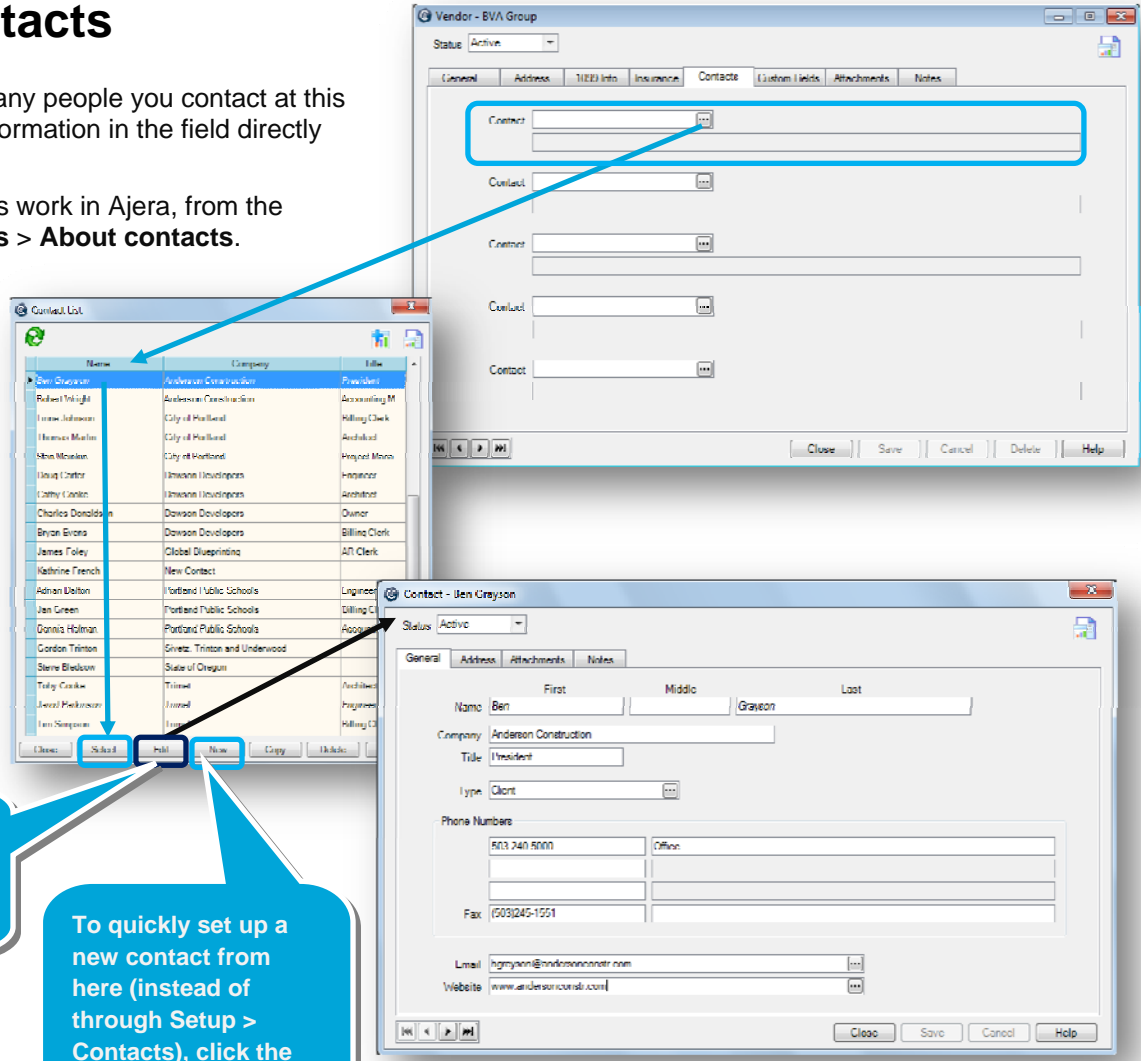
If you require proof of insurance, select this check box.

Enter information about the policy, such as the name of the insurance company issuing the policy, the policy number, amount, and coverage dates.

## Step 5: Enter contacts

Click the **Contacts** tab, and add any people you contact at this vendor, along with any related information in the field directly under the contact.

To learn more about how contacts work in Ajera, from the Contents in Help, select **Contacts > About contacts**.



To later see complete information for the contact, select the contact, and click the Edit button.

To quickly set up a new contact from here (instead of through Setup > Contacts), click the New button.

**Summary**  
 In this lesson, you learned how to set up vendors so you can easily work with vendor information as you need it.