Setting up vendors

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

In this quick lesson

In this quick lesson, you will learn how to:

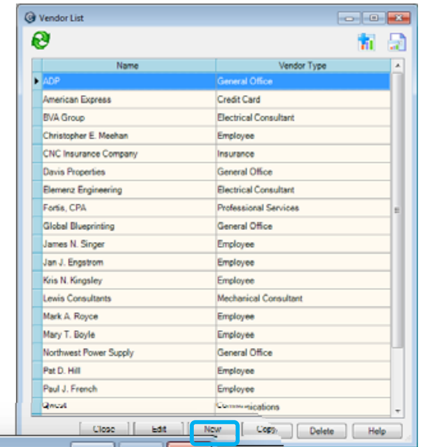
- Enter general information about the vendor.
- Record 1099 information related to the vendor.
- Enter insurance-related information for the vendor.
- Reference key contacts.

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.

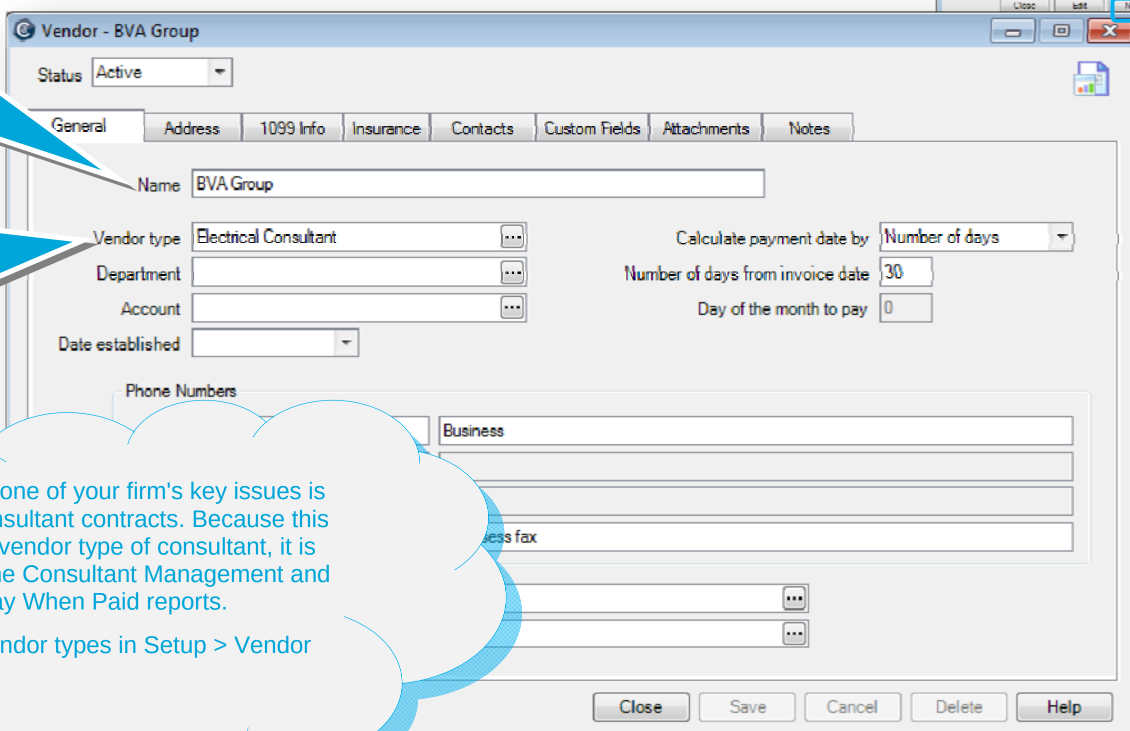


Enter the vendor's name.

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.

Step 1: Enter general information (continued)

4. Continue entering general information about the vendor.

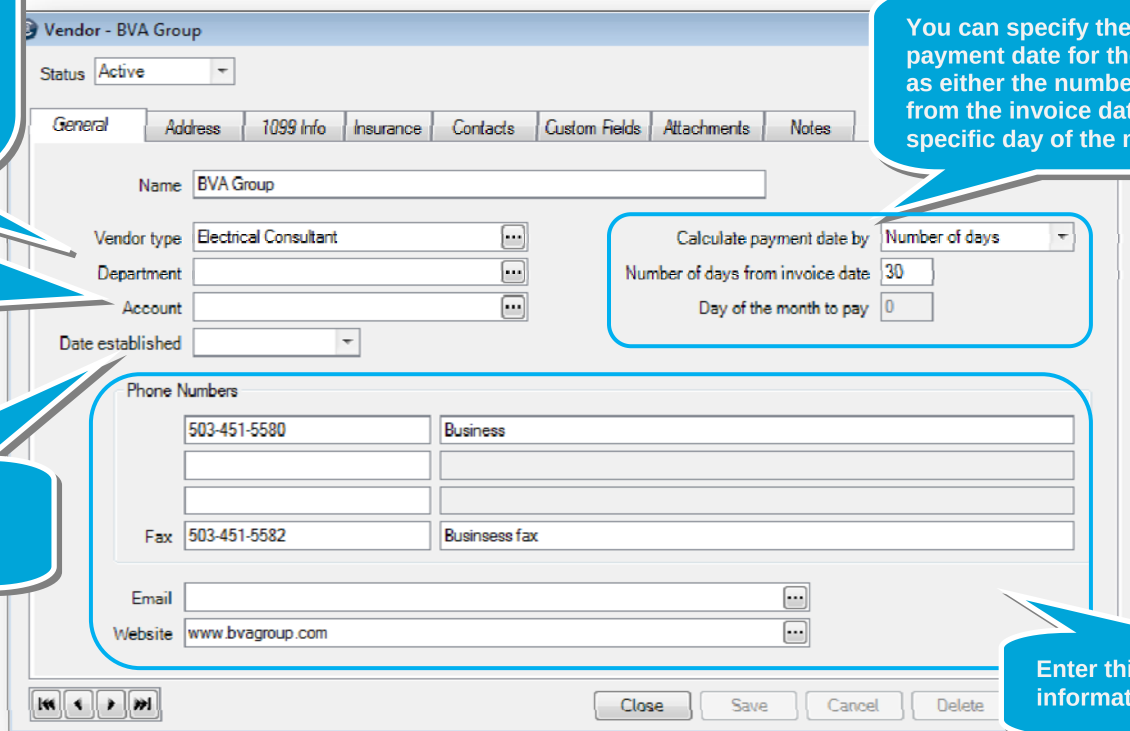
For ajeraComplete or the Departments add-on only.

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.

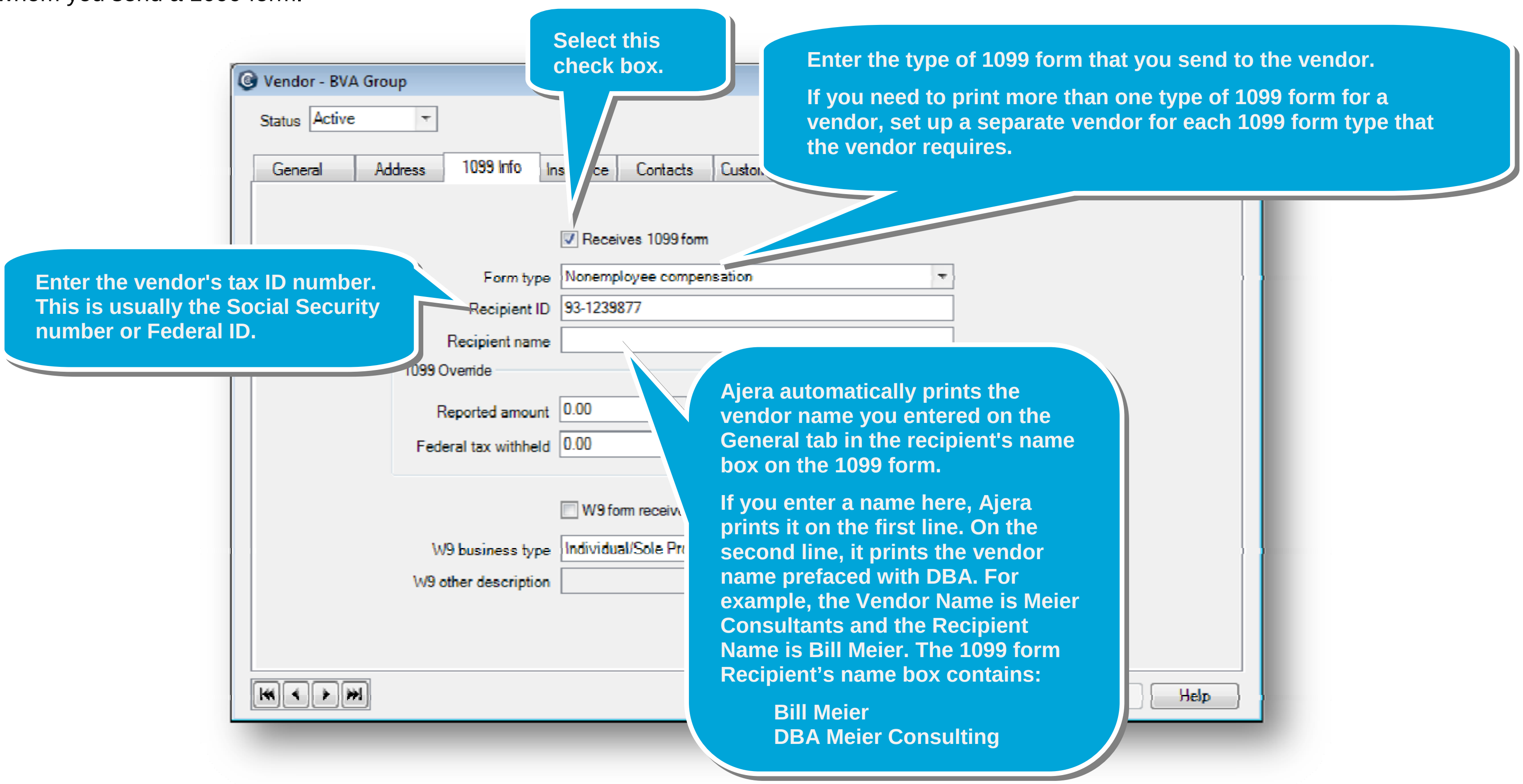
Step 2: Enter the vendor's address

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

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

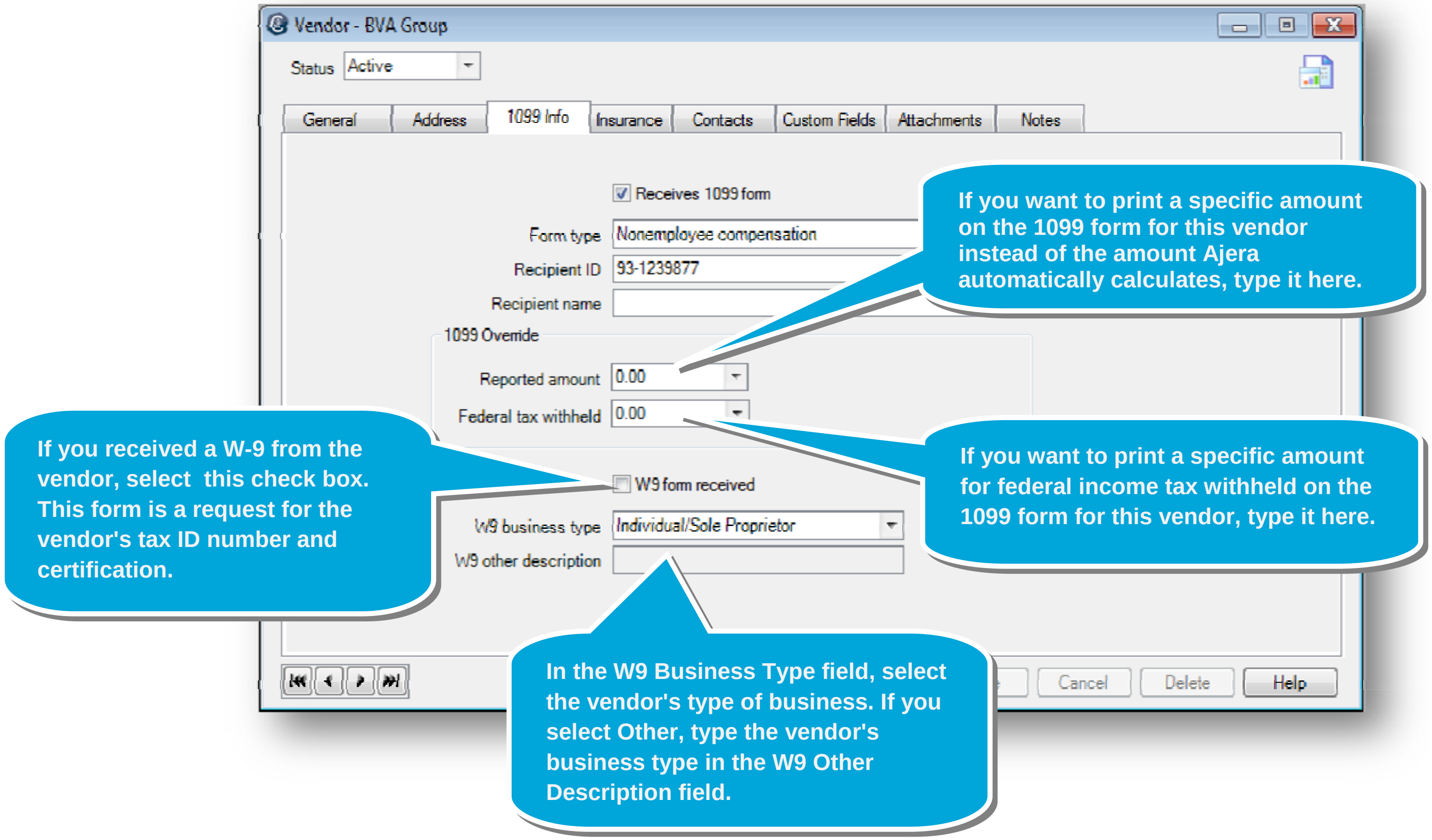
Step 3: Enter 1099 information

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



Step 3: Enter 1099 information (continued)

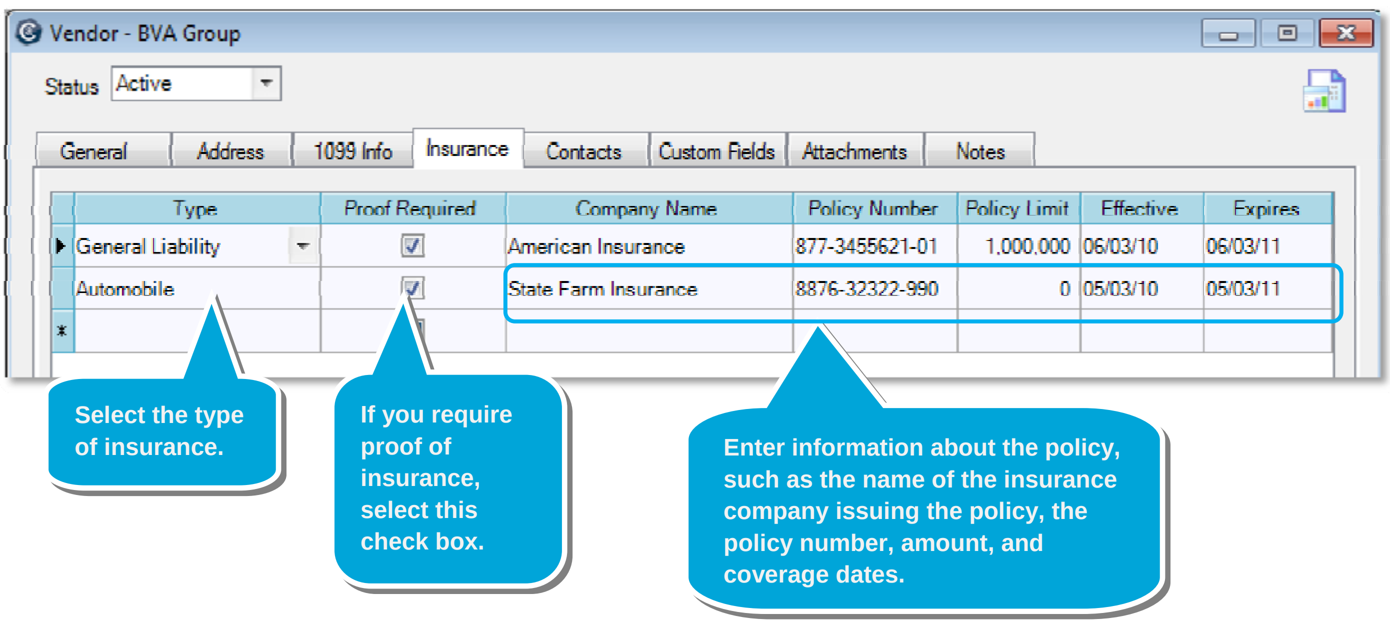
2. Continue entering 1099 information for the vendor.



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.

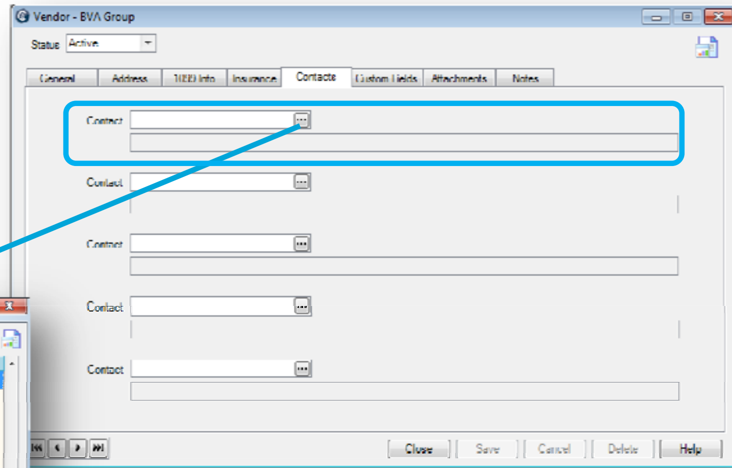
Click the **Insurance** tab, and enter information about the vendor's insurance.

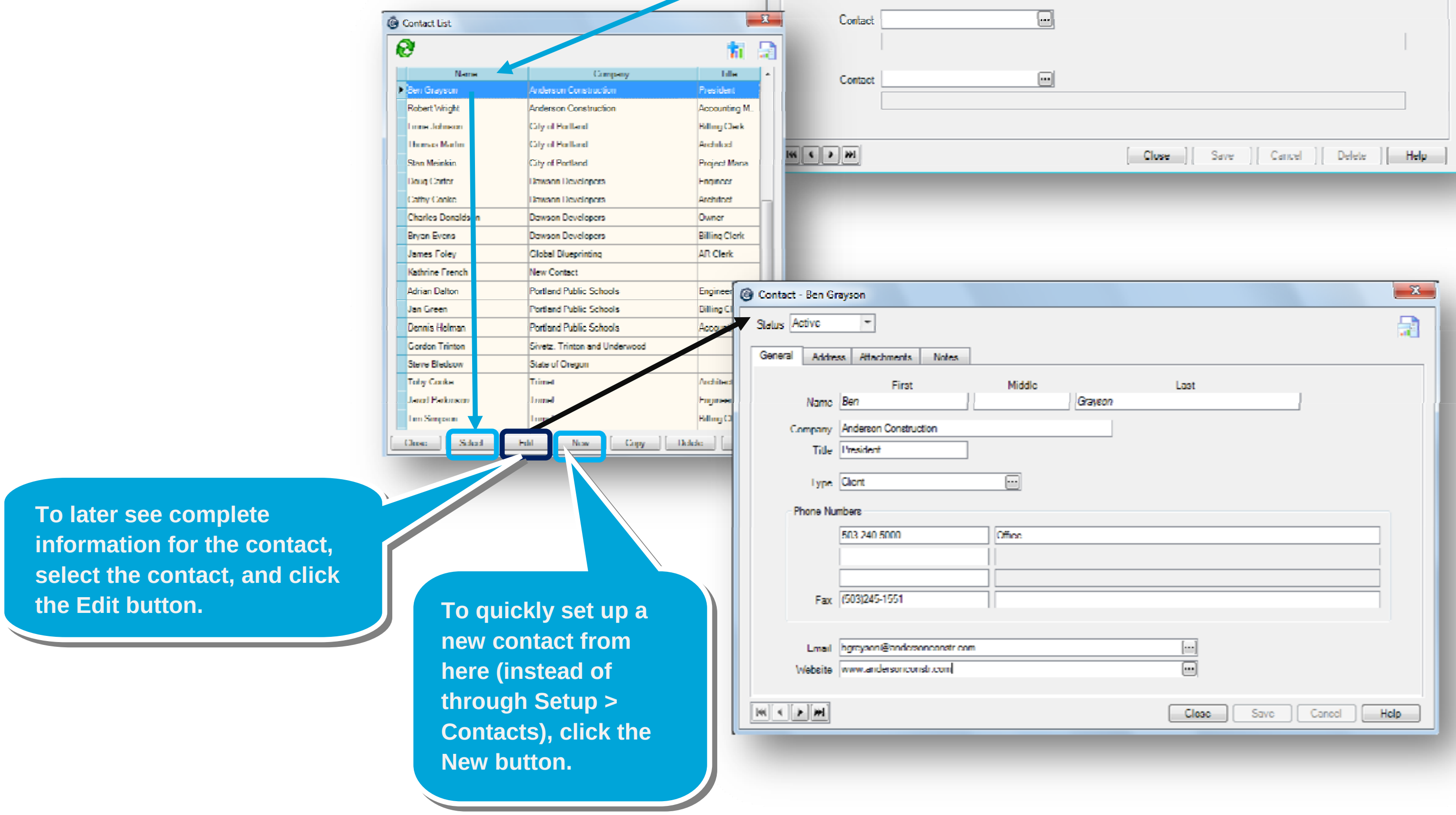


Step 5: Enter contacts

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**.





Summary

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