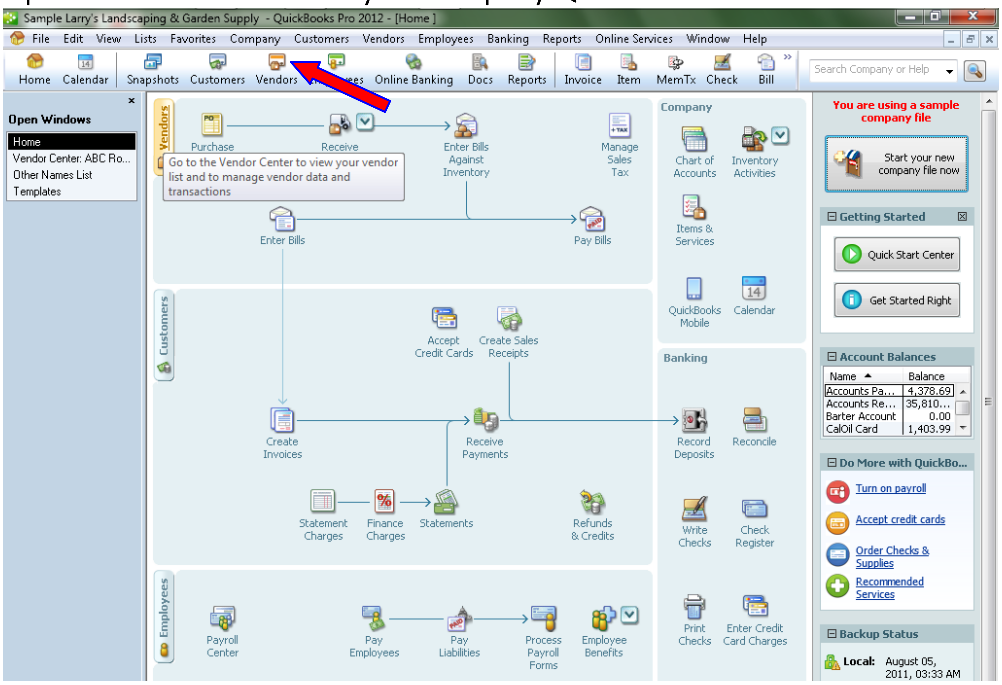
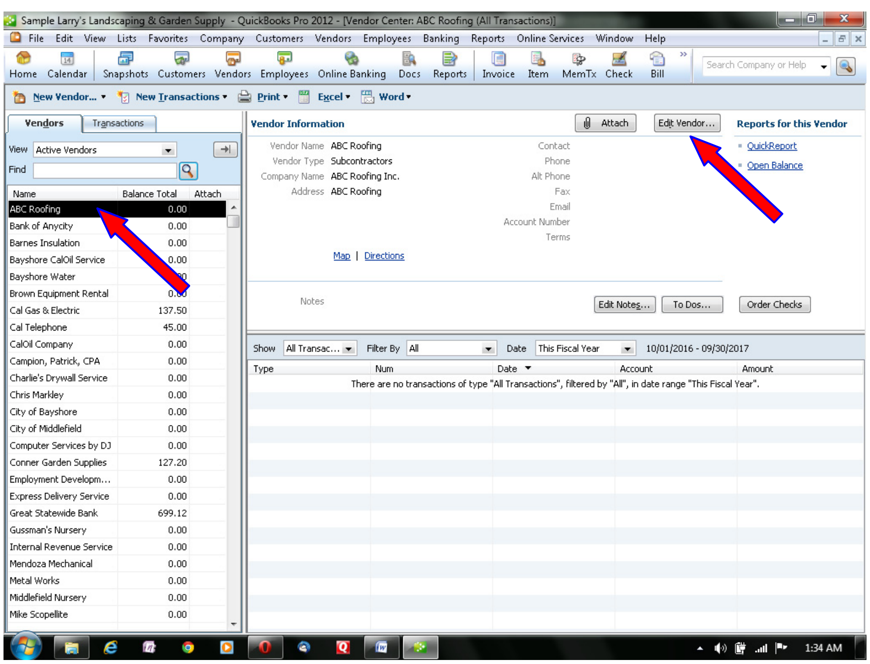
Setting Up Subcontractor Tracking in QuickBooks

With a little customization, you can set up a way to track your subcontractor insurance certificates in QuickBooks. First, we'll get your vendors set up so that Quickbooks can find your subcontractors and their insurance information.

Open the Vendor Center in your company QuickBooks file.

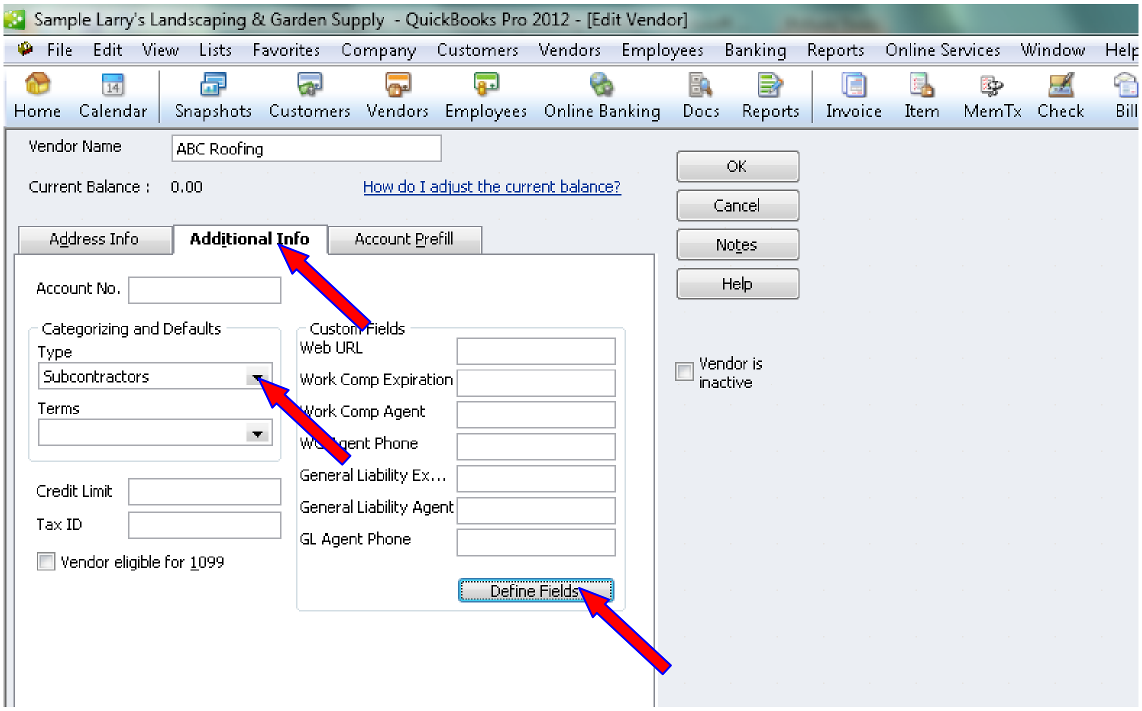


Look down the list from the top and find the first company listed that is a subcontractor. Double click on the name so that the vendor information box opens. It will look like this:



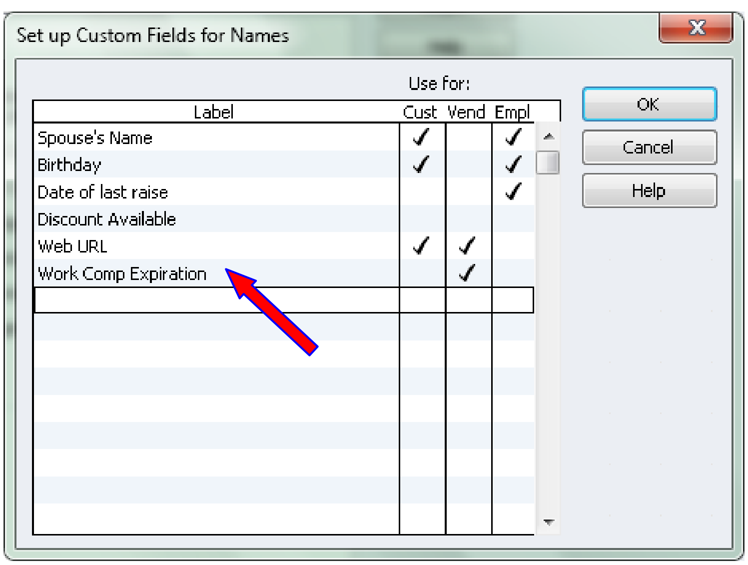
Click on the "Edit Vendor" button.

Then click on the “Additional Info” tab to the right of the “Address Info” tab. You will now see something similar to this:

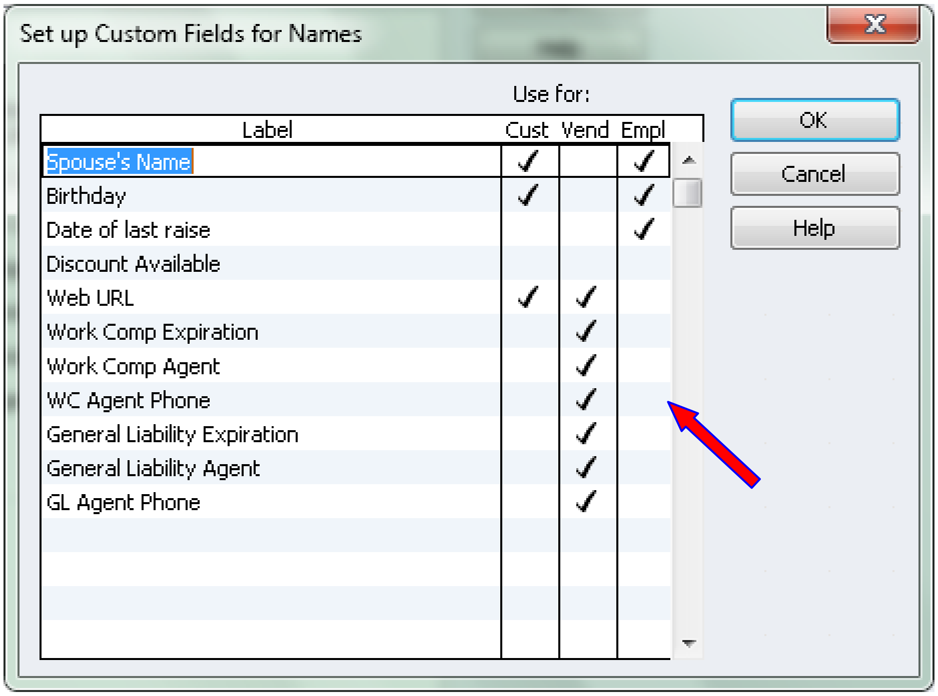


In the “Type” box, click the down arrow and select “Subcontractors”. To the right is the “Custom Fields” area. If your version of QuickBooks does not have the fields to the right for your subcontractor insurance information, you can add them. We will now set up the fields for insurance information in this area as you see them in the picture. Once you add these fields they will always appear in this Additional Information area. Click on the “Define Fields” button. In the first box under Label type in “Work Comp Expiration” then click the check box under Vendor so that this field will appear for your vendors.

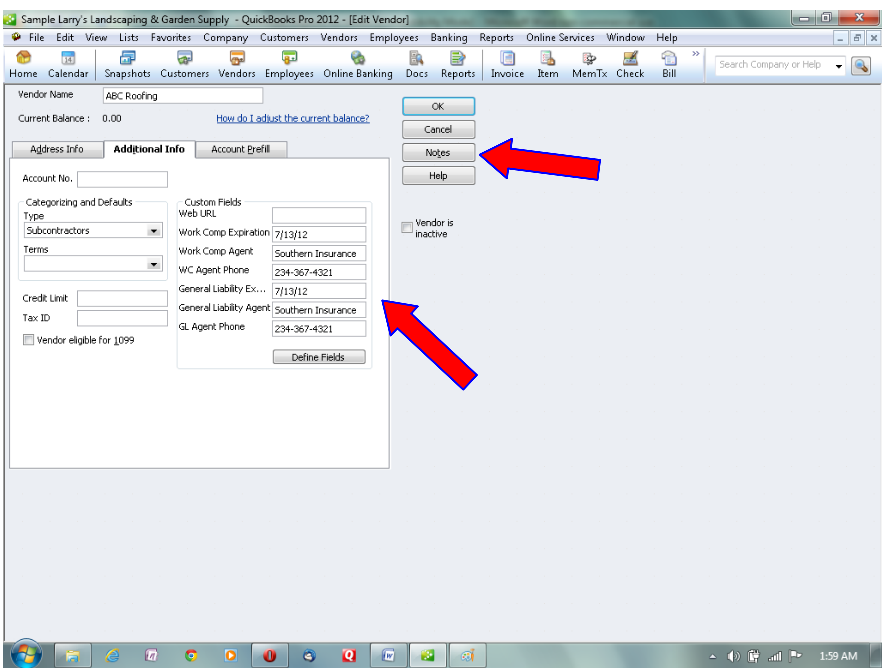
Your screen now looks like this:



Now add the other fields as shown below:

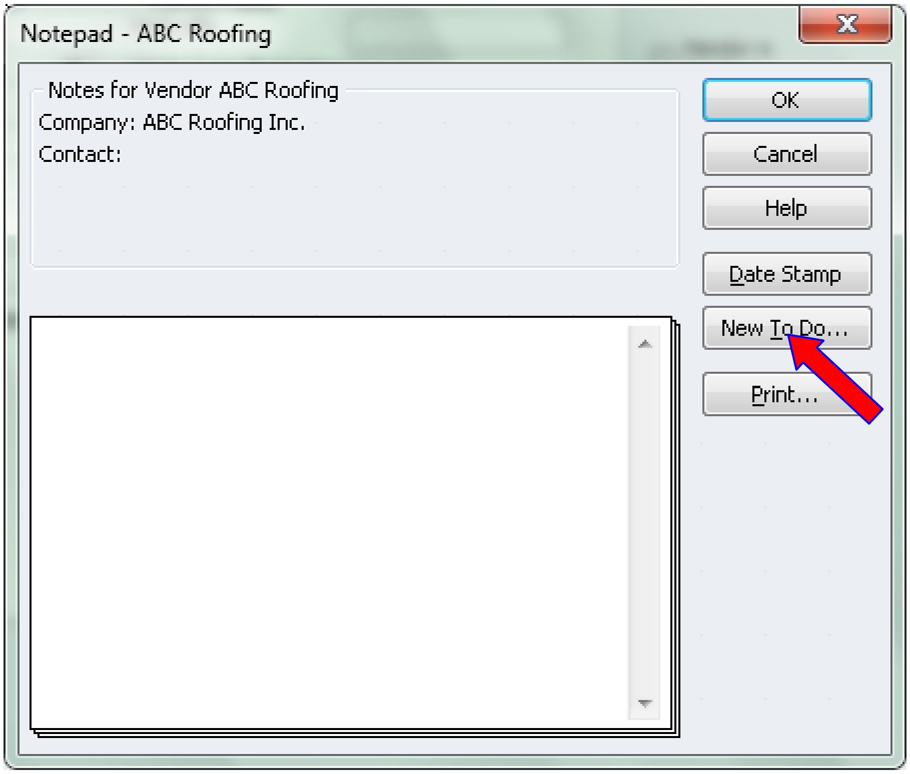


Now Click OK and you'll see the fields in the Additional Info area. Now you can add the date that each subcontractor's insurance expires on and have the agent information handy to call for the certificate.

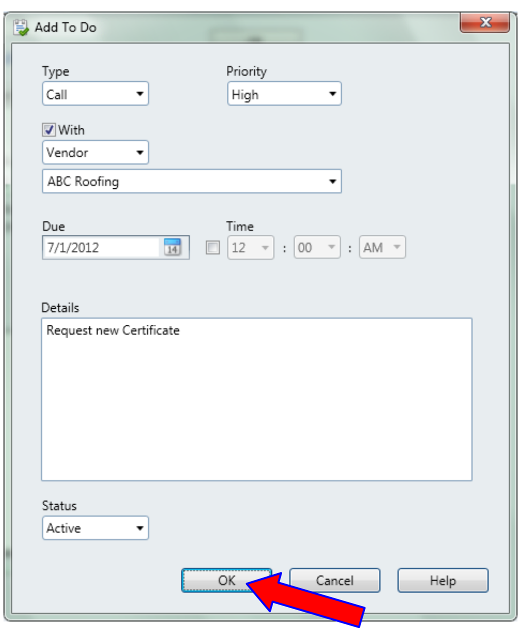


If you would like a reminder on the date of expiration you can set up a "To Do" in your calendar. Start by clicking on the Notes button.

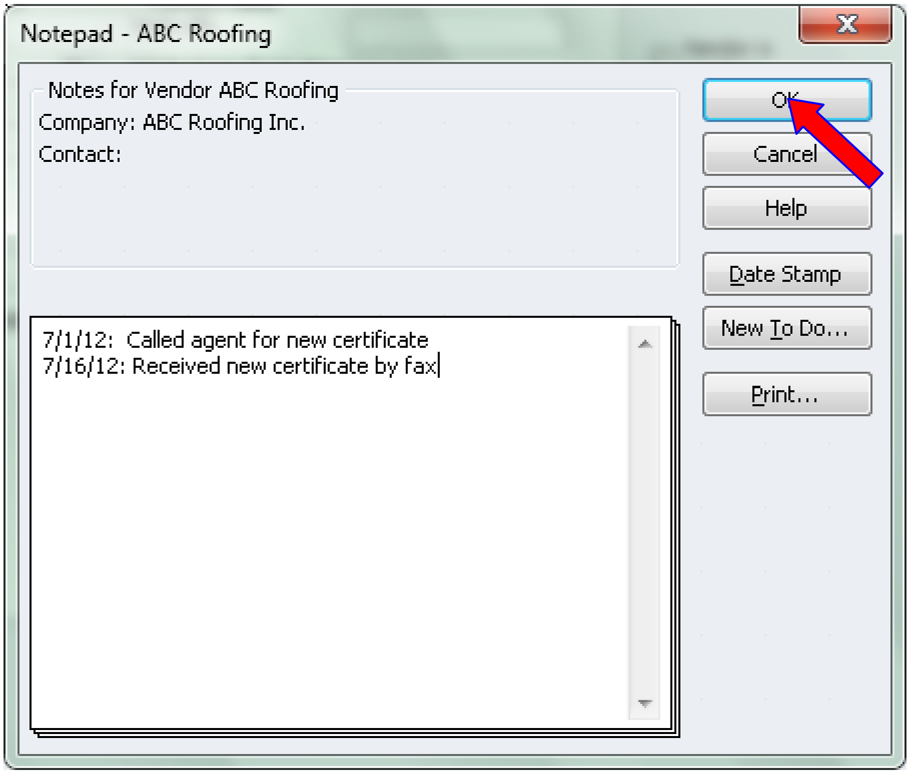
This is the area where you can log notes about this particular vendor. Now click on the "New To Do" button. See below:



Type in your reminder and chose the date of expiration or an earlier date for the reminder. It's a good idea to put the company name in the reminder because it will not stay linked to the company. Later it may be hard to figure out who you need to call for.



When you're done with the To Do click "OK" and then click "OK" again on the Notepad screen as shown below:



Click OK again and you're back to your Vendor List. Take the time to set up ALL of your subcontractors with this information. The information can be very useful.

Your To Do list is available via Calendar which is reached by clicking on the Calendar Icon in your menu bar.