# Tracking Subcontractors and Certificates in QuickBooks

The most frustrating part of an insurance audit is managing the subcontractor certificates of insurance. Most auditors recommend that certificates are organized in a three ring binder and alphabetized in the same order as they appear in your QuickBooks vendor list. Let's start with a report that will give you a list of the subs. Go to the menus at the top of the page choose: Reports⟹ List⟹ Vendor Contact List
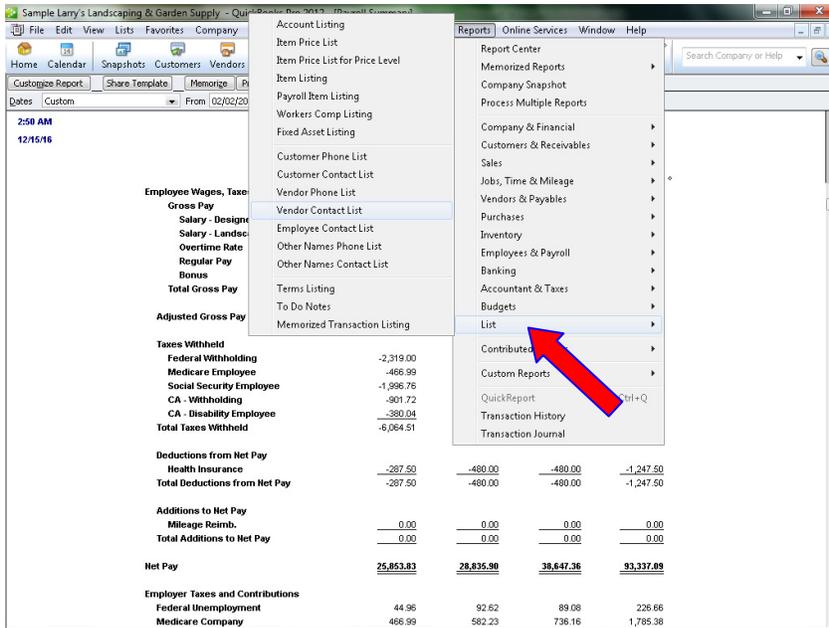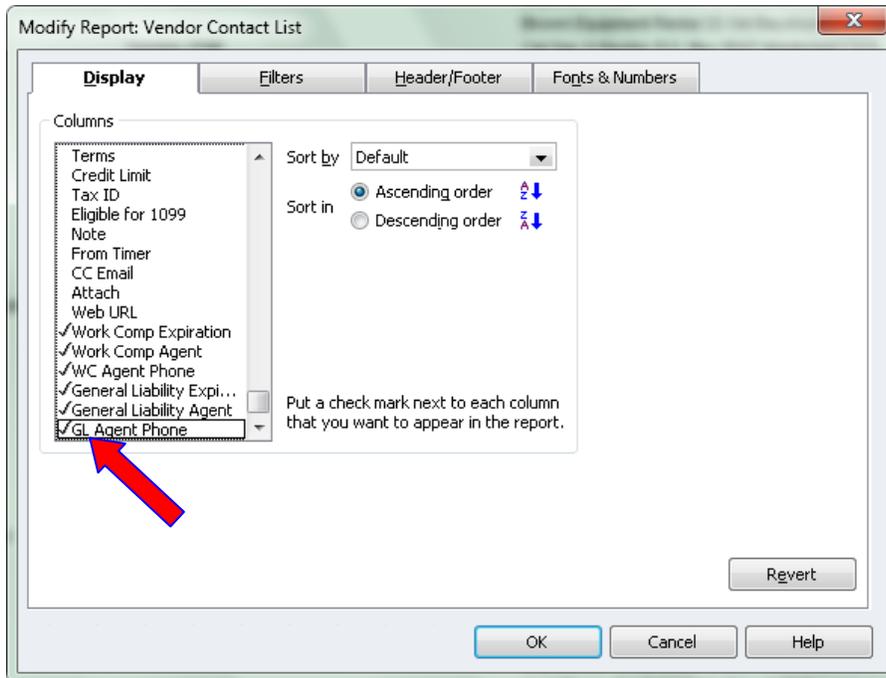

Your screen will now show this report:
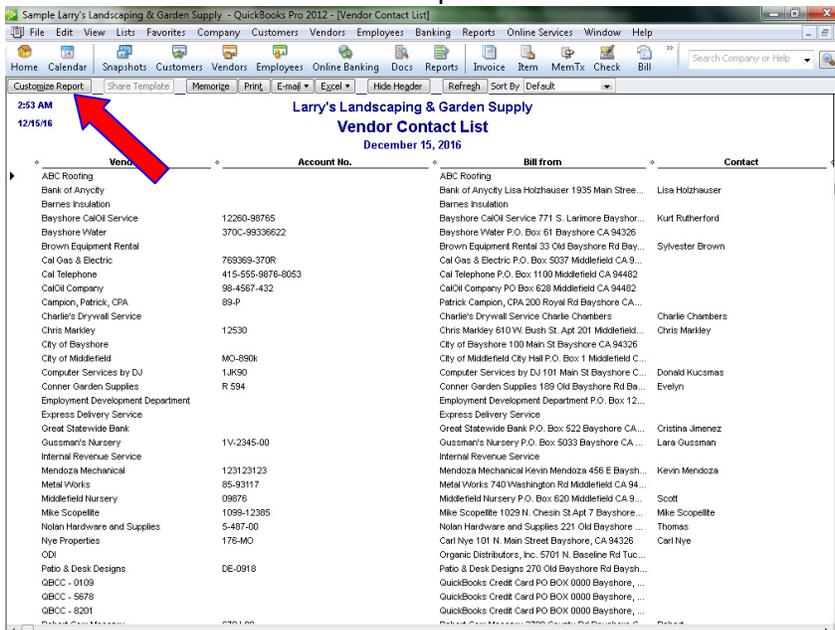

Click "Customize Report" and you get the following screen:

In the columns area, check and uncheck so that the columns checked are:
Vendor, Phone, Contact, Work Comp Expiration, Work Comp Agent, WC Agent Phone, General
Liability Expiration, General Liability Agent, GL Agent Phone.

Now click on the Filters Tab and you will the screen below. Active Status should already be in
the Current Filter Choices area. Choose Vendor Type in the Choose Filter list and then select
Subcontractors to the right. Click OK to return to the report.

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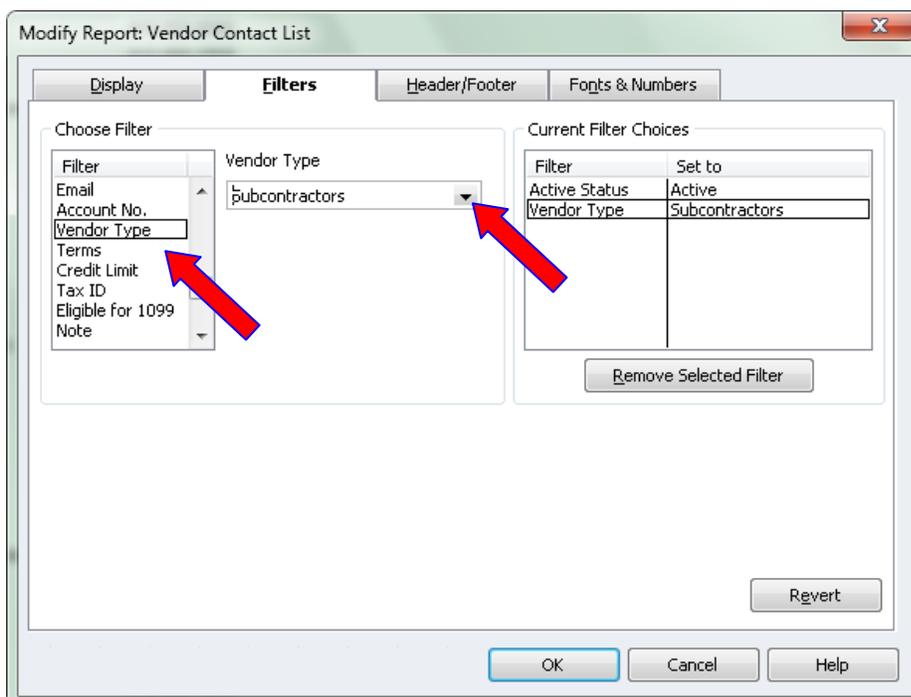
You can adjust the column widths by dragging the little diamonds between the column names to make the columns fit the information better. It can be sized to fit on the screen like this:
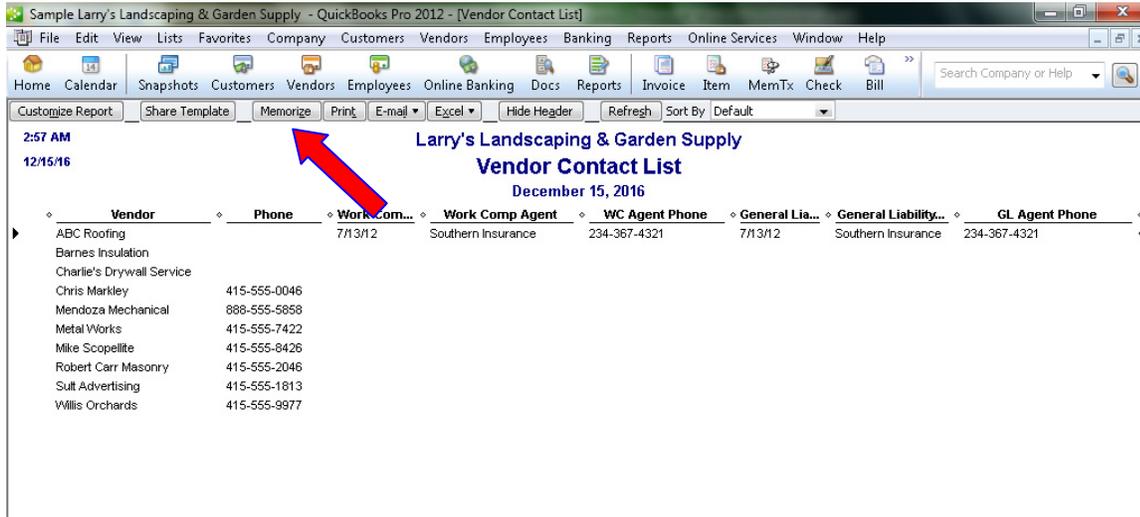
Click "Memorize" and save the Report to the name Subcontractor Insurance Contact List and click OK.