



Accounting New Vendor Set Up Subcontractors

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Purpose

The purpose of this Standard Operating Procedure is to identify vendors that are providing labor when performing services to the company. These vendors need to be set up in the company accounting system to process their invoices and make payments to these vendors timely and accurately.

Procedure:

- 1) Identify the new subcontractor vendor and collect needed information to set up in the accounting system.
 - A) Company name, address, and tax ID number
 - i) Completed W-9 form
 - B) Certificate of insurance per company requirements including general liability insurance and worker compensation insurance
 - C) Business license or contractor license
 - D) Payment remittance address
 - E) Preferred payment method
 - F) Contact person name, email address and phone number
- 2) Set up new vendor – subcontractor in Sage 300
 - A) Go to -> Accounts Payable module -> Setup -> vendors
 - B) Vendor Setup box pops up
 - C) Enter 4-digit new vendor number
 - i) Determined by next 4-digit number in the sequence
 - D) Enter vendor information collected earlier in appropriate field
- 3) Sync to Procore to complete the process
 - A) Sage 300 automatically syncs to Procore each hour
 - B) Go to ERP Integrations in Procore
 - C) Select Vendors
 - D) Type the vendor name in the search for vendor blank
 - E) Push the + Add to Procore button to add the new vendor