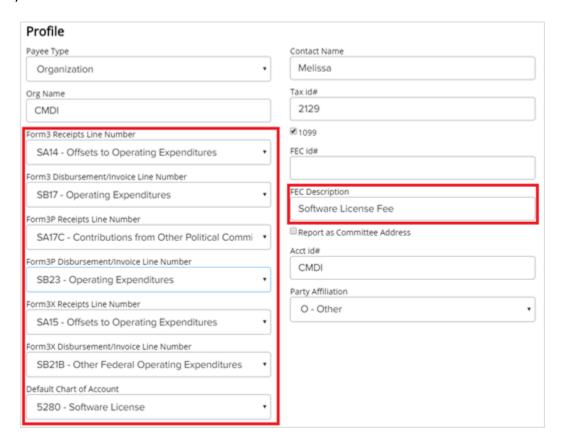In Crimson, default Payee settings can be enabled for each payee record records to save time and allow for a smoother process during Treasury data entry.

Treasury Receipts, Expenditures, Invoices and Payment Requests Default Fields:

There are Payee Settings that allow clients to select default information such as **FEC line numbers**, **FEC Descriptions**, and **Chart of Accounts** (G/L Codes) to be automatically pre-filled for any new **Receipts** and/or **Expenditures**, **Invoices**, or **Payment Requests** created in Crimson.

This saves you time because you will no longer need to select the FEC line number, FEC Description, or Chart of Account for every new transaction that you enter going forward, unless that information is different from the payee's defaults you selected. In which case, you can manually override the default prefilled during data entry.
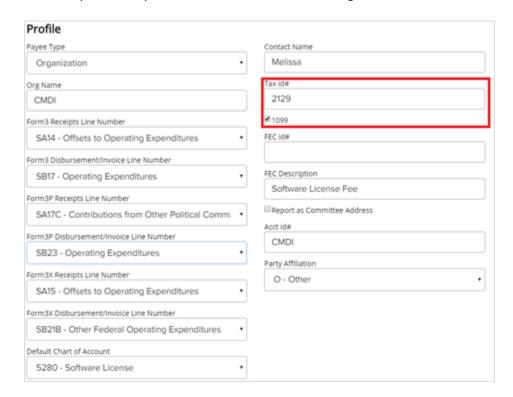
When default FEC line numbers are selected in Payee records for the different Form Types - **Form 3**, **Form 3X**, and/or **Form 3P**, that line number will automatically be assigned to any new transactions that apply to that payee record and **Form Type** (based on Fund Code). The Form 3P default line number fields will only be available if the database contains a Form 3P fund code.

For more info about **FEC Line Numbers**, please see the **What are FEC Line Numbers by FEC Reports?** FAQ on the HelpDesk.
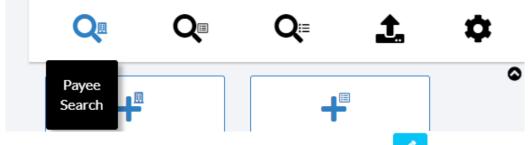
1099 Payee Settings:

1099 Payee Settings allow clients to enter the **Tax ID#** for any Payee and if 1099 tracking is needed, clients can use the **1099** checkbox indicator found under the payee's profile. When enabled, this indicator automatically marks any new transaction for 1099 tracking.

For more info about **1099 Features**, please see the **Treasury – 1099 IRS Reporting Features** guide on the HelpDesk.

To make edits to a Payee's settings:

1. Go to the **Treasury Dashboard** of Crimson and select the **Payee Search** from the **Navigation Bar**.

2. Search for the Payee record you would like to update and click to open their profile.
3. Click "**Organization**" or "**Individual**" at the top of the profile to access the **Edit Payee** window.
4. Make your updates, then click **Save**.