

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.

Profile

Payee Type Organization	Contact Name Melissa
Org Name CMDI	Tax id# 2129
Form3 Receipts Line Number SA14 - Offsets to Operating Expenditures	<input checked="" type="checkbox"/> 1099
Form3 Disbursement/Invoice Line Number SB17 - Operating Expenditures	FEC id#
Form3P Receipts Line Number SA17C - Contributions from Other Political Commi	FEC Description Software License Fee
Form3P Disbursement/Invoice Line Number SB23 - Operating Expenditures	<input type="checkbox"/> Report as Committee Address
Form3X Receipts Line Number SA15 - Offsets to Operating Expenditures	Acct id# CMDI
Form3X Disbursement/Invoice Line Number SB21B - Other Federal Operating Expenditures	Party Affiliation O - Other
Default Chart of Account 5280 - Software License	

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:

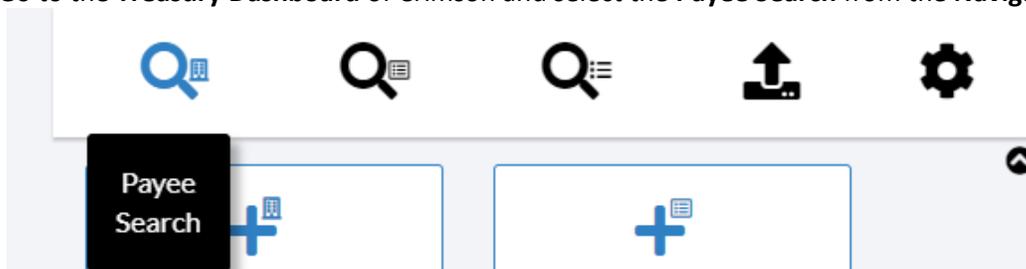
1099 Payee Settings allow clients to enter the **Tax ID#** for any Payee and if 1099 tracking is needed, clients can use the **1099** checkbox indicator found under the payee's profile. When enabled, this indicator automatically marks any new transaction for 1099 tracking.

The screenshot shows a 'Profile' form for a payee. The form is divided into two columns. The left column contains dropdown menus for 'Payee Type' (Organization), 'Org Name' (CMDI), 'Form3 Receipts Line Number' (SA14 - Offsets to Operating Expenditures), 'Form3 Disbursement/Invoice Line Number' (SB17 - Operating Expenditures), 'Form3P Receipts Line Number' (SA17C - Contributions from Other Political Commi), 'Form3P Disbursement/Invoice Line Number' (SB23 - Operating Expenditures), 'Form3X Receipts Line Number' (SA15 - Offsets to Operating Expenditures), 'Form3X Disbursement/Invoice Line Number' (SB21B - Other Federal Operating Expenditures), and 'Default Chart of Account' (5280 - Software License). The right column contains text input fields for 'Contact Name' (Melissa), 'Tax id#' (2129), 'FEC id#' (empty), 'FEC Description' (Software License Fee), 'Acct id#' (CMDI), and 'Party Affiliation' (O - Other). A checkbox labeled '1099' is checked and highlighted with a red box. There is also a checkbox for 'Report as Committee Address' which is unchecked.

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**.