



**Module 03 – Subcontract Management**  
**Chapter 02**  
**VENDOR INSURANCE**

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## Vendor Insurance for ProjectPro Dynamics-BC

### INTRODUCTION

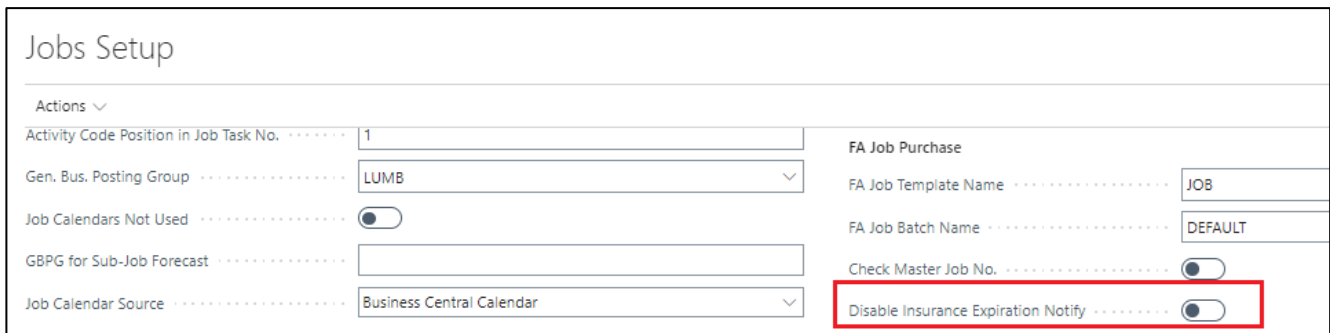
Vendor insurance in subcontracting refers to the insurance coverage that a subcontractor is required to maintain to protect themselves against various risks and liabilities associated with the work they are performing.

When a subcontractor is hired to perform specific tasks or provide goods or services as part of a larger construction project or contract, the main contractor often requires the subcontractor to carry certain types of insurance to mitigate potential risks.

### VENDOR INSURANCE

#### Jobs Setup

On the Jobs Setup under the General fast tab, there is a setup known as “Disable Insurance Expiration Notify”.



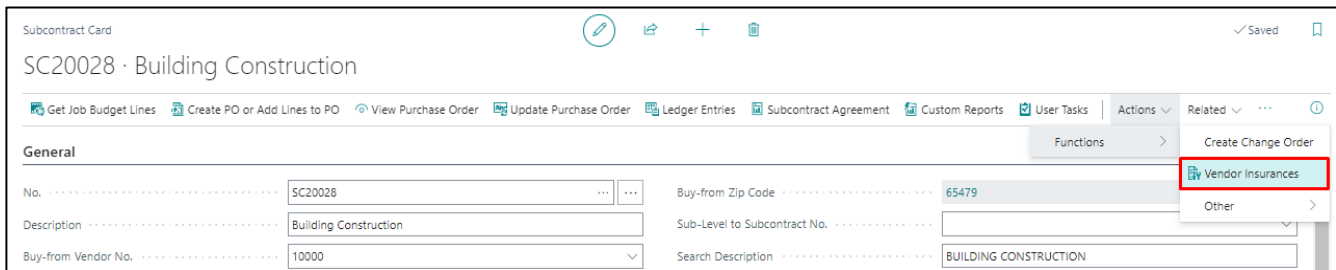
The screenshot shows the 'Jobs Setup' form with the following fields and values:

- Activity Code Position in Job Task No.: 1
- Gen. Bus. Posting Group: LUMB
- Job Calendars Not Used:
- GBPG for Sub-Job Forecast: (empty)
- Job Calendar Source: Business Central Calendar
- FA Job Purchase: (empty)
- FA Job Template Name: JOB
- FA Job Batch Name: DEFAULT
- Check Master Job No.:
- Disable Insurance Expiration Notify:  (highlighted with a red box)

This setup allows you to disable the warning message on the payment journal when the “Expiration Date” set on the Vendor Insurance Policy is before the Work Date.

#### Subcontract Card

On the required subcontract card, create vendor insurance lines by clicking on Vendor Insurances from the ribbon.



The screenshot shows the 'Subcontract Card' for 'SC20028 - Building Construction'. The ribbon includes the following options:

- Get Job Budget Lines
- Create PO or Add Lines to PO
- View Purchase Order
- Update Purchase Order
- Ledger Entries
- Subcontract Agreement
- Custom Reports
- User Tasks
- Actions
- Related
- Vendor Insurances (highlighted with a red box)
- Other

The 'General' section of the card contains the following fields:

- No.: SC20028
- Buy-from Zip Code: 65479
- Description: Building Construction
- Sub-Level to Subcontract No.: (empty)
- Buy-from Vendor No.: 10000
- Search Description: BUILDING CONSTRUCTION

A Vendor Insurances list page will open as below, where you can fill in the required insurance details.

**Vendor Insurance for ProjectPro Dynamics-BC**

Vendor Insurances

✓ Saved

## 10000 · GEN. INSU. · P-000121

Insurance Type ↑	Carrier Name	Policy No. ↑	Value	Expiration Date	Vendor No. ↑ ▼	Job No.
→ GEN. INSU. <span style="color: lightblue;">⋮</span>	SBI	P-000121	100.00	8/15/2023	10000	J01240

FIELDS	DESCRIPTION
<b>Insurance Type</b>	Specifies the nature of the insurance policy and what risks or assets it is designed to protect such as General insurance, Vehicle insurance etc.
<b>Carrier Name</b>	Specifies an organization or company that provides insurance policies.
<b>Policy No.</b>	Specifies a unique identifier assigned to an insurance policy. It is a combination of letters and/or numbers.
<b>Value</b>	Specifies the insurance value assessed/estimated for an item/asset being insured.
<b>Expiration Date</b>	Specifies the date the insurance policy officially ends or ceases to provide coverage.
<b>Vendor No.</b>	Specifies the Vendor No. as an insurance holder who owns the insurance policy.
<b>Job No.</b>	Specifies the Job No. against which the insurance policy is applicable.

**Payment Journal**

On the Payment Journal, create payment entries as required. The system will give a warning message for the insurance expiration (if any) when you post them.

Warning: Insurance has expired for Vendor 10000

OK