

How do I add or update address and contact information?

The Address Book is fully integrated into Quicken. See the Notes section below to learn more.

To add or update address and contact information in the Address Book

1. Choose **Tools** menu > **Address Book**.
2. To add a new address, click **New**.
3. On the **Payee** tab, enter a payee name. A payee name is required when you add a contact to **Address Book**. You can enter as much additional detail as you want.
4. To edit an address, select it from the **Address List** (if necessary, first select the proper group from the Group drop-down list), and then click Edit.
5. Click the **Contact** tab and enter as much detail in the fields as you want.
6. Click **Use Payee** to copy the **Payee** name (from the Payee tab) into the Name or Organization fields. (Optional)
7. Click the **Documents** tab to upload documents pertaining to this person. You can upload documents only for a customer or a vendor. You can upload any agreements you may have with this person or any ID proof / Address proof of this person etc for future references. To do this, click on ' **Attach**' and upload a scanned copy of this document. You can add 'Notes' to enter any extra information about each document.
8. Click **Format** to format the information for [printing](#). (Optional)
9. Click **OK**.

To update an address from the Memorized Payee or Bill & Income Reminders List

1. From the **Memorized Payee List** or **Bill & Income Reminders List**, select the payee you want to update.
2. In the **Action** column, click **Edit**.
3. Click **Address**.
4. Update the address and any other necessary information in **Address Book**.
5. Click **OK**.

To update an address from the Write Checks window

1. Choose **Tools** menu > **Write and Print Checks**.
2. Enter the payee name.
3. Click **Edit Address**.
4. Update the address and any other necessary information in **Address Book**.
5. Click **OK**.

To update an address from a business form

1. From the **Edit Estimate** or **Edit Invoice** window, enter the customer or vendor name you want to change.
 - Quicken will fill in the address fields for you if the address is in the QuickFill List.
 - Otherwise, enter the address you want to update.
2. Make any changes necessary, and save the form.
 - In the Update Address dialog, click Update to update the existing address in the Address Book, or
 - Enter a unique identifier in the Description field to distinguish the changed address from the existing address in Address Book, and then click Add.
3. Quicken displays the payee name in the Address Book window with the identifier enclosed by braces (for example, Financial Institution {Credit Card}). The identifier is for tracking purposes only and won't display on printed checks or forms.

To add payees to the QuickFill list

Quicken has several automatic features for data entry. Together, these features are called QuickFill. When you're entering data in the Address Book, register, Write Checks window, or Split Transaction window, QuickFill completes each field after you type a few letters. QuickFill also provides drop-down lists so that you can find items such as payee names and categories quickly.

1. Choose **Tools** menu > **Address Book**.
2. Click **New**.
3. Enter the payee information.
4. Select the Include this Payee in QuickFill List check box.
5. Click **OK**.
6. Choose **Edit** menu > **Preferences** > **Register**.
7. In the left navigation pane, click **QuickFill**.
8. Select the **Add Address Book QuickFill items** to **Memorized Payee List** check box.

Notes

Other than what I enter directly, is additional contact information included in Address Book?

Yes.

- In addition to the contacts you add to Address Book, the Address Book contains the payee names and addresses you've created in the Memorized Payee List, Bill & Income Reminders List, and the Write Checks window.
- Items on the [Memorized Payee List](#). Items on this list [QuickFill](#) for you in any appropriate fields (for example, customer name and address fields on estimates and invoices if you use Quicken Home & Business) after you type a few letters.
- You can add or update contact information from any of the above locations. If you use Quicken Home & Business, you can also manage contact information from any business form you may need to submit to a customer or a vendor (for example, estimates and invoices and payments to vendors).

If I modify a contact in the Address Book, will it be updated elsewhere in Quicken?

- Any changes you make to the contact information in the Address Book are reflected in your Bill & Income Reminders List. If you use Quicken Home & Business and your payees have been added to your Customer and Vendor Lists, these lists are updated as well.
- Address Book updates the information in your Reminders and Memorized Payee Lists, and the Write Checks screen, but it does not update the Online Payees list. To do this, choose **Tools** menu > **Online Center** > **Payees**. Your payment processor may [not allow you to change](#) certain online payee information (for example, the address of a payee for which there are pending online payments).

What if I have two very similar payees?

- When you change the address of a payee, Quicken asks if you want to update the existing payee or create a new one. If you enter the same payee name with a different address, you must add a unique identifier to the name to distinguish one payee from the other.



Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
 Canada: "Colour" / United States: "Color"
 Canada: "Centre" / United States: "Center"
 Canada: "Realise" / United States: "Realize"
 Canada: "Behaviour" / United States: "Behavior"
 Canada: "Analyse" / United States: "Analyze"