

# How do I create or edit an estimate or invoice?

You can create an estimate to list goods you might sell or services you might provide to a prospective customer. When you print or enter the estimate there is no change in your income, because there is no guarantee that you will complete the transaction.

When a customer accepts your estimate, you can easily make any necessary modifications to it and then convert it to an invoice. The invoice appears in the invoice account you select, with the next sequential invoice number.

Because you convert estimates directly to invoices, the two forms look very similar and require you to fill in most of the same information, such as the customer, date, and billing address. You also enter details about the products and services you sell. These are called invoice items in Quicken.

Of course, you don't need to create an estimate to convert to an invoice. You can simply create an invoice whenever you need to bill customers for the products or services they bought from you.

Click the topic below for the item you want more information about.

## Create an estimate or invoice

1. Select the appropriate option:
  - To create an estimate: Click the **Business** tab, then click the **Business Actions** and choose **Invoices and Estimates > Create Estimate**.
  - To create an invoice: Click the **Business** tab, then click the **Business Actions** and choose **Invoices and Estimates > Create Invoice**.
2. In the **Customer** field, enter the name of the person or firm with whom you're dealing, or select the name in the list.
  - **Do I need to enter this customer every time?**  
No. The first time you enter a customer name, QuickFill memorizes the name. The next time you create an estimate or invoice for that customer, you can select it in the list.
3. In the **Project/Job** field, enter the project/job name, or select the name in the list. (Optional)

If you're entering a project/job for the first time, Quicken displays the [New Project/Job dialog](#) for you to complete.

The names of closed projects/jobs don't appear.

4. In the Layout list, select the layout you want to use. Quicken displays the layout you last used. You can also click Customize to go to the [Forms Designer](#) to create a new layout. You're given the option of saving your current invoice or estimate before opening the Forms Designer. This lets you create a new layout in the Forms Designer and then go back to your invoice or estimate and apply the new layout.
  - **Why doesn't the form look like my customized layout?**  
The Invoice and Estimate dialogs in which you create specific invoices or estimates are for data-entry purposes only. The dialogs will contain the same fields as your customized form layouts, but they may not accurately reflect the appearance of your customized form layouts. However, your form will appear correctly when you print or email it.
5. In the Business Tag list, select the tag for the business this invoice is for.
  - **What kind of tag should I enter in this field?**  
You must enter a [tag that is associated with a business](#).
  - **How does Quicken use this information?**  
Quicken automatically appends the business tag you specify here to the category for any invoice items you enter in the Item field, using the format category/business tag.

You should not include one business tag at the invoice level and another business tag at the invoice item level because Quicken will not be able to determine which business the invoice item belongs to. If you want to include business tags at the invoice item level, then you should leave the Business Tag field in the invoice blank.

6. In the **Bill To** field, enter the name and address.
7. If your form displays the **Ship To** field, enter the ship to name and address, or, with the cursor on the top line, press the ' (apostrophe) key to copy the information from the **Bill To** area. (Optional)
8. Quicken displays today's date, but you can change it using the pop-up calendar or by typing over it.
9. If your form displays the Due Date field, enter the expected date of payment. For example, if payment is due on receipt, enter today's date. The default due date is the invoice date plus 30 days, but you can [change](#) it.
  - **Can I enter a note about the due date terms?**  
Yes. If you want to enter information about the due date terms, such as **On Receipt**, enter the text in the **Customer Message** field. Quicken prints the message in the lower-left corner of the estimate or invoice. Use print preview to see exactly where the message will appear.
10. If your form displays the P.O. Number field, enter the customer's purchase order number for tracking purposes. (Optional)
11. In the Item field, click the drop-down arrow to display a list of available invoice items. Select an item in the list. Quicken fills in the category, description, and rate or price based on what you specified when you created the item. If you included a tag with the category, Quicken displays that as well.
  - **What if the invoice item I want isn't in the list?**  
If the item you want isn't in the list or you don't yet have any items, enter a new name. Quicken asks if you want to add a [new item](#). Click Yes, enter the information, and then click **OK**.
  - **What if the invoice item includes a business tag?**  
You should not include one business tag at the invoice level and another business tag at the invoice item level because Quicken will not be able to determine which business the invoice item belongs to. If you want to include business tags at the invoice item level, then you should leave the Business Tag field in the invoice blank.
12. If you charge sales tax for this item, Quicken displays a **T** in the **Taxable** column. If you want to turn tax tracking off for this item, click in the **Tax** column. (Optional)
  - **How do I add an account for sales tax?**  
The first time you create an invoices/receivables account, Quicken creates an account called \*Sales Tax\* to track the tax you charge your customers.
13. In the **QTY** field, enter the quantity of items you're selling.  
Quicken automatically updates the value in the Amount column for you, based on the quantity multiplied by the rate.

14. You can Add links to **Paypal**, **Yelp**, **Directions** etc to your invoices (This feature is not available in **Canada**). You can embed a paypal link which will allow your customers to pay you using their credit / debit cards or from their paypal accounts. You can also claim a business or embed a '**Yelp review**' link of your business, within the invoice. To do this, click on '**Insert Web Links**'. In the popup that opens, set up a Paypal / Yelp / Directions link. To set up a Paypal link, you must have a paypal business account. If you do not have a paypal business account already, you will be taken through the process, in this flow. Once you have set up the links, you have to choose the links that you want to embed in your invoice, by clicking on the check boxes to the left of the web links. Your customer will be able to click on these links and send money to your paypal account, using their credit / debit cards / paypal account.
15. In the **Customer Message** field, select a message in the list, or enter a new one. (Optional)
16. You can create and send emails along with your invoice. (See [Add a customized email](#) below.)
17. If this invoice contains any taxable items, enter a tax rate in the **Tax** field. The rate should be in the form xx.xx (for example 8.25, not .0825). The percent sign isn't required.
18. At this point, you can either [email](#) the estimate or invoice to your customer, or mail it. (Optional)
19. Click **Save** and **New** to record the transaction and open another form, or click Save and Done if you're finished entering invoices or estimates.

## Notes

If you invoice a customer for the same items on a regular basis, you don't need to reenter the same information each time. Instead, you can copy the original transaction to a new line in the invoices/receivables register and modify it as needed. Simply select the invoice transaction you want to copy, choose **Edit** menu > **Copy Transaction**. Then click a new line in the register, choose **Edit** menu > **Paste Transaction**, make any changes you want, and click **Save**.

## Edit the information on an estimate

1. To open the **Estimate List**, click the **Business** tab, then click the **Business Tools** and choose **Estimate List**.
2. In the **Estimate List**, select the one you want to change, and then click **Edit**.
3. Make changes where necessary.
4. Click **Save** and **Done**.

## Edit the information on an invoice

1. [Open the account](#) where you track your invoices.
2. Select the transaction for the invoice you want to change, and then double-click the word **--Form--** in the **Category** field.
3. In the **Invoice** dialog, make changes where necessary.
4. Click **Save** and **Done**.

## Notes

- You can use the [Forms Designer](#) to include only the fields and columns you need in your estimates and invoices. You can also rename or resize the fields and columns, reposition the fields and your company logo, and display your company address.
- You can save time and effort on estimates and invoices by [prefilling](#) default due dates and customer contact information.

## Add a customized email

You can send a customized email to your payee, along with an invoice or estimate.

1. Create an invoice or estimate as you usually would. For the best experience, ensure that the invoice or estimate is otherwise completed.

2. Select the **Email** button on the form. The **Email Preview** window will appear.

The screenshot shows the 'Email Preview' window. At the top, there's a 'Template' dropdown set to '(Default) Appreciate your business', with 'Save' and 'Save As...' buttons. Below this are fields for 'From' (ewitt@quicken.com), 'To' (testcustomer@testcustomer.com), and 'Subject' (This is your Invoice). There are also checkboxes for 'Send a copy to self', 'CC', 'BCC', and 'Use default subject'. An 'Attachment' section shows 'Invoice\_102.pdf' with a checked checkbox. The main body of the email is displayed in a light blue box, containing a personalized message: 'Hello Test Customer, We appreciate your business. Here is your Invoice. Thank you! Regards, John'. Below the message is a scrollable area showing 'Test Customer' and 'WP Install'. At the bottom, there are 'Send Email' and 'Cancel' buttons.

3. Customize the email to suit your needs. This usually means changing the email text to update or personalize the message, but you can change the content of the **From**, **To**, and **Subject** fields. You can also choose whether to include a PDF attachment of the invoice or estimate.



#### Character Limit

Email messages must be less than 500 characters.

4. If you wish to reuse this email as a template in the future, select **Save As** at the top of the screen. The **Save Template As** screen will appear. Give the template a unique name. You can also choose to **Set as default template**.
5. Click **Send Email** to deliver the email to your recipient.

This feature requires **Quicken Business & Personal**. Learn how you can [upgrade Quicken](#) in minutes.