How do I prefill information on an estimate or invoice?

Change invoice options

1. Open the account that contains the invoice.
2. Click (the Account Actions icon), and then choose Invoice Defaults.
3. In the **Due Date** field, enter the date before which you expect to receive payment. For example, if you want payment within 30 days after the date of the invoice, enter 30; if payment is **Due On Receipt**, enter 0. (Optional)
4. If you set up additional sales tax accounts, in the Tax Account field, select the default tax account for the invoice. (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.
5. Click **OK**.

Add a customer to the Customer List

You can add a customer to your **Customer List** in one of two ways:

- Simply enter the name and address in your business form. Quicken adds it to your **Customer List** (for addresses entered in invoices, estimates, and so on) or your Vendor List (for addresses entered in bills, and so on).
- Choose **Tools** menu > **Address Book** to add the name to the Address Book.

When you add a name to the **Address Book**, you can also add it to the QuickFill List. Then, the next time you start entering the address in a business form, it is filled in for you.

Notes

You can also prefill information about invoice items, which will save you time when you're ready to fill out your estimates and invoices.

This feature requires **Quicken Business & Personal**. Learn how you can upgrade Quicken in minutes.