How do I create or edit a project/job?

The Quicken Project/Job feature helps you track multiple jobs for a given customer. For example, a freelance writer can use projects/jobs to invoice a client for consecutive writing assignments, or a plumbing subcontractor can use them to track jobs for a general contractor. A single project/job may have a history that includes an estimate and several invoices, plus payments and possibly bills for reimbursable expenses. Here are more examples of when you might use projects/jobs:

- If you manage several apartment buildings, set up the building addresses as customers and the individual apartments as projects/jobs.
- If you invoice against purchase orders, set up each purchase order number as a project/job.
- If you have a practice or organization that sends one statement to a family to cover individual members of the family, set up the family as the customer and family members as projects/jobs.

You can create or edit a project/job and assign transactions to it at any time while you're conducting business with your customer. For example, initially you might submit a single invoice to a customer. At that point, while you're only tracking a single invoice, you don't really need to assign it to a project/job. But suppose your customer extends the project, or you end up needing to buy supplies for which you will be reimbursed. As the paperwork proliferates, you can create a project/job and assign the original invoice to it, along with the new forms you plan to create.

1. Click the **Business** tab.
2. Click the **Business Tools a**nd choose **Project/Job List**.
3. Select the appropriate option:
   - To create a new project/job, click **New**.
   - To change an existing project/job, click **Edit**.
4. In the **Customer** field, enter or edit the name of the person or firm with whom you're dealing or select a name in the list.
   If you're entering a customer name for the first time, Quicken adds it to the Address Book. The next time you create an estimate or invoice for that customer, you can select it in this list.
5. In the **Project/Job** field, enter or edit the project/job name.
6. In the **Status** list, select a status for your project/job. If the status you want isn't in the list, click **New/Edit** to create your own status flag or change an existing one.
7. In the **Description** field, enter or edit a description. (Optional)
8. In the **Dates** area, enter or change the start date and projected end date for your project/job.
9. Click **OK**.

This feature requires Quicken Home, Business & Rental Property. Learn how you can upgrade Quicken in minutes.