# :stimates Defaults

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stimates Defaults contain options that will automatically apply to patient estimates. They can be changed t any time to a new default setting; once changed, the default will only take effect for new estimates reated.

ollow the steps below to set your Estimates Defaults for a specific office.

1. Select **Customer Setup** > **Practices**.
2. Use the **Show All** button to view all practices. Or user the **Search field** to further drill down your search.
3. Select the **Practice**.
4. Locate and click on the **Defaults tab** from the right-hand side panel.
5. Click the **Estimates tab**
6. Check the ***Show new estimates in the Payment Portal Automatically*** checkbox to show any patient estimates in the payment portal by default.
7. Create new estimates using:
    1. **Auto**: Select this option to create new estimates based on eligibility by default.
    2. **Quick**: Select this option to create new estimates based on copay by default.
8. Click **Save**.

> ⚠ Configure these settings before configuring the patient estimates interface automation. For more information on configuring our patient estimates interface automation, visit our "Manage Patient Estimates" help article.