QUICKBOOKS ON THE INTUIT PLATFORM
TOOLKIT FOR ACCOUNTANTS AND BOOKKEEPERS

Elevate your work with a more powerful QuickBooks

QuickBooks, powered by the Intuit platform, now offers Intuit AI agents that help you save time and keep your client relationships strong. And, we've improved the QuickBooks experience to help you manage more of your work in one place. This toolkit answers questions you and your clients may have about the new experience's features, so you're prepared to make it all work for you, your firm, and your clients.

Last updated: November 2025

Understand the new connected platform

With QuickBooks, essential business tools work together, so you and your clients can stay on top of everything and be ready for anything. Learn how this new experience can save time and boost productivity for you and your clients.

Learn about AI agents

Under your guidance and control, new AI agents help you categorize transactions, detect and resolve anomalies, and more. Learn how agents can save you time so you can focus on your most valuable work.

Get answers to common questions

QuickBooks now has more powerful features designed to deliver a better experience for everyone. Learn what's included in each plan and the benefits they provide for you and your firm.

Resources for your firm and clients

From FAQs to PDFs to video tutorials and quick links, we've compiled all the information you and your clients need to get the most from Intuit's new experience.

Understand the new connected platform

All your work, all in one place

QuickBooks has evolved. It includes all the fundamentals you know and love along with even more powerful tools and Intuit AI agents to help get more done. You and your clients will get the best of automation, insights, and guidance from AI agents focused on the most essential work. Available any time, all in one place, designed to keep you and your clients in control by prompting you to review and approve the work as it's completed.

Business feed

See a summary of what's been done by AI agents and automation features so you can review and approve the work quickly—and get back to your clients' needs.

Improved insights and reporting

A customizable performance dashboard comprehensively tracks your clients' financial health and highlights what needs your attention most. Plus, stay on top of business health with P&L and balance sheet insights.

Smart search

Quickly find transactions, customers, accounts, reports, help, and more with consolidated results from across the platform in the new unified search.

Customer Hub

Your clients get new CRM functionality to help drive more leads and close more deals. They can organize, track, view, and follow up with customers and leads all in one place. These convenient tools also make it easy for your clients to manage everything from capturing referrals to building repeat business.

Navigate the new experience

QuickBooks now has more powerful features to help you and your clients get more done—but the fundamentals you know and love are not changing. Use this page to get familiar with the new experience.

intuit quickbooks

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intuit quickbooks | David's Landscaping ⌄ | **(5)** Search, jump to, or ask a question

(1) Menu

(2) Bookmarks

Dashboard

Feed

Reports

(3) Apps

PINNED

Accounting

Expenses

Sales

Customize

Good evening, Mike!

Accounting | Expenses & Bills | Sales & Get Paid | Customer Hub | Marketing ◈ | Payroll ◈ | Team | ›

(4) ✳ Business Feed   View all ›

Accounting Agent ⋮
2 accounting anomalies were found in your Profit & Loss report
Review all

Customer Agent ⋮
4 new leads from your connected sources are ready for your review and follow up
View all

Finance Agent ⋮
March profile margin dropped by 5% compared to last year
Review

Create actions   Get paid online   Create invoice   Add bank deposit   Record expense   Show all

Business at a glance   ⚙ 👁

SALES & GET PAID FUNNEL   This month ⌄

Create a new payment request
Learn more
Request pay... ⌄

Not paid
$100.00
⚠ 3 overdue invoices

Paid
$300.00
⚠ 1 deposit on hold

Not paid
$500.00
⚠ 3 overdue invoices

BANK ACCOUNTS   As of today
Today's bank balance
$46,380

Chequing (1234)
Bank balance $32,300.00
in QuickBooks $4,000.00
Updated 5 secs ago   4 to review

Mastercard (5678)
Bank balance $8,080.00
in QuickBooks $2,000.00
Updated 3 days ago   9 to review

EXPENSES   This month ⌄   PROFIT & LOSS   This month ⌄

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(1) 💼 **Menu**
Menu has replaced the Accountant toolbox and moved—customize it so your most-used tools are always easily accessible.

(2) 🔖 **Bookmarks**
Bookmark your top places and dashboards just like you did in the previous experience.

(3) ▦ **App carousel**
Everything you need is accessible here. Easily switch between apps like Accounting, Expenses & Bills, Tax, and Payroll.

(4) ✳ **Business feed**
See a summary of work performed by AI agents in one view so you don't have to go find it.

(5) 🔍 **Smart search**
From customers to transactions and more, find what you need quickly across the entire platform.

We've kept all the features you love

Here's where to find them—and what they're called now

Menu
Features like Accounting and Expenses previously appeared in the menu

→

Apps
Now, Accounting and Expenses are called apps, and appear in the app carousel

Apps
3rd-party plugins and tools were previously referred to as apps

→

Integrations
Now, 3rd-party plugins and tools are called integrations, signified by the ⊶ icon

Dashboard
There was previously only one dashboard accessible from the main menu

→

Dashboard plus overviews
Now, the central dashboard has been improved with better customization. You can also customize new overview pages in some apps

AI agents overview

What are AI agents?

Intuit's AI agents are your new digital teammates. They work behind the scenes to proactively surface key insights, and act on behalf of you and your clients with your permission. Each agent is focused on making a different part of your client's business run faster and more easily, while you and your client are always in control. They can create content, plan, think, execute complex business workflows, and flag when a handoff is needed.

Where do AI agents appear?

In the business feed

You and your client can always see the work performed by AI agents—they'll post their updates in the business feed for review and approval. You and your client will be able to see the current AI agent status, as well as a past activity log so you have a complete history of all actions the AI agents have taken.

Agents icon

Wherever you see this icon

It means an AI agent is at work. Click the icon to interact with the AI agent and complete a task right there.

How do I interact with AI agents?

Interact with AI agents by chatting in conversational language, like "that was a business meal, since Clancy Passey and I talked about next month's revenue targets."

- From the business feed, click the Review button on a task to open a dialog box where you can chat with the AI agent. Review and approve the AI agent's work, ask questions, and direct the AI agent's next actions based on the available options.
- Within apps, click the AI agent icon to open the dialog box and begin chatting.

Intuit Assist

Your personal assistant in training

Intuit's AI agents learn and improve with every interaction, becoming more accurate and helpful as you use them.

How AI agents can work for you and your clients

Meet your virtual team: Key AI agent functions

Each AI agent has a specific set of jobs, often related to an app in QuickBooks—like Accounting or Expenses. Under your guidance and control, these AI agents will give you, your team, and your clients a smarter way to work. AI agents can also work together to automate complex workflows, and will learn from your interactions to serve you and your clients even better.


Automation your clients can count on

The Accounting Agent can automatically categorize transactions and detect and resolve anomalies. It can also flag what needs your approval or attention so you can stay focused on what's most important.

Keep profitability on track

The Finance Agent analyzes financial data and automatically creates forecasts, highlights variances, and pinpoints the source—so you can help your clients stay focused on their goals.


BETA Stay compliant, save time

The Sales Tax AI Agent simplifies the review process by comparing profit and loss statements with sales tax liability reports to pinpoint discrepancies and recommend corrections. It allows you to easily review flagged transactions and determine if adjustments are needed.
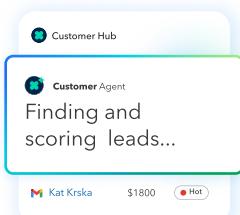
Help your clients grow

The Customer Agent allows your clients to source leads from their inboxes, draft personalized email responses, and track every customer opportunity in the sales cycle so your clients can grow their business efficiently.
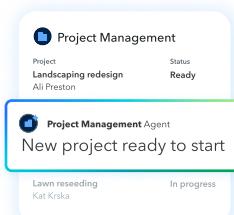
Save time and start projects faster

The Project Management Agent saves you the hassle of starting projects from scratch. It takes care of the heavy lifting by automatically creating draft projects pre-filled with key details —such as project name, customer information, start/end dates, and custom fields.

> My first impression with the new AI features? One word that I keep using is 'transformative'. It's been exciting to see the pace of improvement with QuickBooks on the Intuit Platform. It's not just one simple agent that doesn't do much: it's a plethora of agents that's really going to help transform different areas of people's businesses.

Mike Libbey
Partner & COO, YBL

How more powerful features work together to help you engage with your clients

intuit quickbooks

Automation where it counts. Human when it matters.

As an accountant or bookkeeper, you lead the engagement with your clients—consulting, advising, and giving the final word. We handle the prep and exception work in partnership with your team, doing things like draft categorizations—all with your supervision, review, and approval. When our AI agents are combined with your trusted expertise, you and your clients save time, make smarter decisions, and drive better business outcomes.
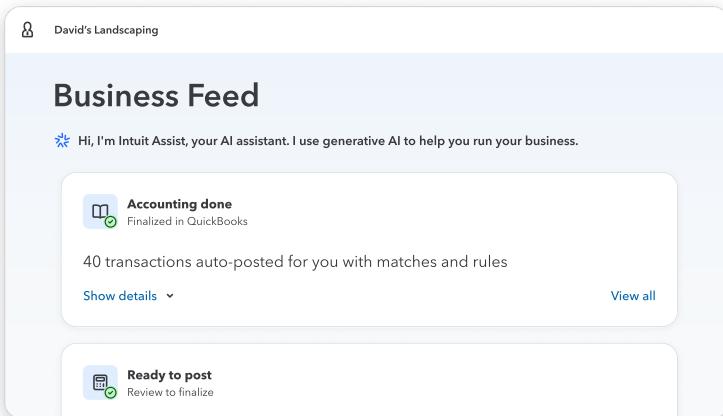

David's Landscaping

Business Feed

✳ Hi, I'm Intuit Assist, your AI assistant. I use generative AI to help you run your business.

Accounting done
Finalized in QuickBooks

40 transactions auto-posted for you with matches and rules

Show details ⌄   View all

Ready to post
Review to finalize

The Accounting Agent handles work for you, shown in the business feed

The work performed by the Accounting Agent appears in the business feed. You and your client can approve the transactions the AI agent is confident about, as well as see more details about any work performed by the agent.

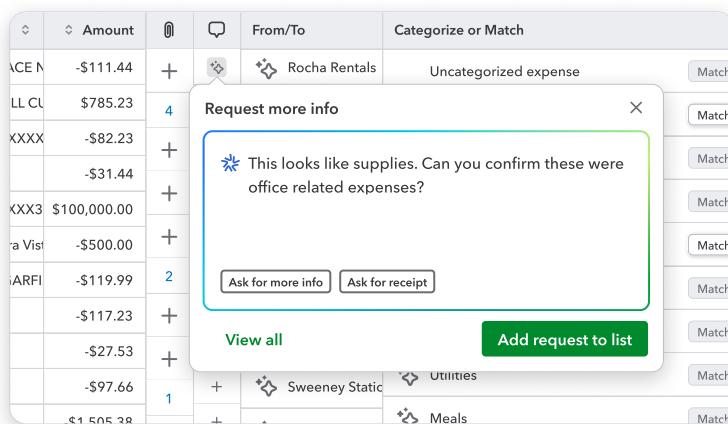## Transactions that need your attention are highlighted for your review

When the Accounting Agent finds transactions that need more information, it creates a review task in the business feed. You and your client can open the task, review the transactions, and decide what to do next.
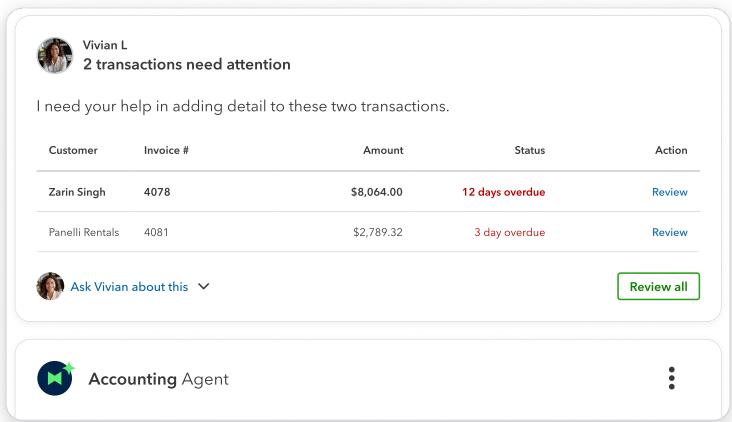
Vivian L
2 transactions need attention

I need your help in adding detail to these two transactions.

Customer	Invoice #	Amount	Status	Action
Zarin Singh	4078	$8,064.00	12 days overdue	Review
Panelli Rentals	4081	$2,789.32	3 day overdue	Review

Ask Vivian about this ⌄   Review all

✦ **Accounting** Agent   ⋮

You can collaborate with your client right in the platform

In this example, these transactions require more information from the client in order to categorize them accurately. An AI agent will help you craft a message to your client and automatically update the transaction categories when you receive a response. Your clients can even respond right from QuickBooks.

	Amount	📎	💬	From/To	Categorize or Match	
ACE N	-$111.44	+		Rocha Rentals	Uncategorized expense	Match
LL CU	$785.23	4				Match
XXXX	-$82.23	+				Match
	-$31.44	+				Match
XXX3	$100,000.00	+				Match
a Vist	-$500.00	+				Match
ARFI	-$119.99	2				Match
	-$117.23	+				Match
	-$27.53	+				Match
	-$97.66	+		Sweeney Static	Utilities	Match
	$1,505.38	1			Meals	Match

Request more info   ✕

✳ This looks like supplies. Can you confirm these were office related expenses?

Ask for more info   Ask for receipt

View all   Add request to list

Questions and answers

What will be changing?

QuickBooks is evolving to include powerful features to help you get more done—but the fundamentals you know and love won't change.

What's changed?

- New Intuit AI agents
- New streamlined navigation
  - *Improved consolidated search*
  - *Improved business feed*
- Customer Hub CRM functionality

- Updated customizable reports
- New full-screen mode for more room to work
- New bulk client opt in/opt out option
- Accountant toolbox is now Menu

What hasn't changed?

- **Your data:** No data is moving, migrating, or changing.
- **Manual workflows:** You can still perform your jobs in the same way as before, and without automation if you prefer.
- **Your pages:** All of the pages you're familiar with remain in QuickBooks.

- **QuickBooks functionality:** All of the same jobs and tasks can be performed as always. No features are being removed.
- **Security:** All data within the QuickBooks platform, including anything an agent interacts with, will remain secure as it is today.

NEW AI AGENTS

Your clients' plans are improved with new AI features that will save time

No matter which QuickBooks plan your clients are currently using, they'll receive new AI tools in the coming months. Depending on their plan, this update may include powerful new AI agents. The number and type of AI agents vary by plan, so you can help your clients find the one that best aligns with their needs as their businesses continue to grow.

Can I still use the previous version of QuickBooks Online?

Yes, accountants may opt out current QuickBooks Online clients from the new experience. While the previous version will remain available for now, it will eventually no longer be supported. All clients will be automatically moved to the new experience at that time. You will be notified before this change happens.

Do I have to upgrade to get access to some of these features?

Every QuickBooks customer has access to AI functionality and powerful tools, including EasyStart. The exact capabilities will depend on which plan you have.

To learn which tools and agents are included in each plan, see full details here.

*Exclusions apply. Some clients will not have access to the new QuickBooks experience. Individual clients can still switch between the previous and latest version of QuickBooks.

Stay up to date with the new QuickBooks

For the most up-to-date info on the latest QuickBooks tools, agents, and capabilities, check the resources page on our website.

Visit website

HELPFUL RESOURCES

Getting to know the new QuickBooks

Get everything you need to learn about new features, explain changes to your clients and team, and stay informed.

FOR YOUR FIRM

AI Agents

📋 **Blog posts:**

Agentic AI experiences coming to QuickBooks

▶ **Videos:**

Accountants talk about new Intuit AI agents (Testimonials) (1:30)

The new experience

📋 **Blog posts:**

Now available: get early access to QuickBooks on the Intuit platform

▶ **Videos:**

QuickBooks Online on the new Intuit Platform (Webinar) (59:28)

Intuit Platform Explainer Video (5:30)

FOR YOUR CLIENTS

The new experience

▶ **Blog posts:**

Coming soon: A more powerful QuickBooks on the Intuit platform

Now available: early access to QuickBooks on the Intuit platform

▶ **Videos:**

Get an overview of the new Intuit Platform (Explainer video for business owners) (4:43)