

A firm's guide to QuickBooks

Closing books and preparing for tax season can be a complex, demanding process. We believe you shouldn't have to go it alone. In QuickBooks, you'll find new innovations designed to provide intelligent insights, foundational reliability, and a smarter books-to-tax workflow. Use this guide to get to know these updates so you can use them to help your clients.

Table of contents

Foundational improvements

Learn more about QuickBooks usability improvements designed to help ensure accuracy and reliability in your work.

[Upgraded bank connection communication](#)

[Better banking experience](#)

[Autosave and data protection](#)

[Support for multiple email addresses](#)

[Streamlined services setup](#)

[Usability enhancements](#)

Intuit Intelligence

Learn more about Intuit Intelligence, which brings together a conversational interface, Human Intelligence (HI), and business data—all in one place. These features can help you improve client advisory and promote a simpler, smarter tax season.

[Intuit Intelligence chat](#)

[Use case for Intuit Intelligence chat](#)

[Business Tax AI](#)

[AI onboarding](#)

Additional information

Get answers about the QuickBooks February 2026 update.

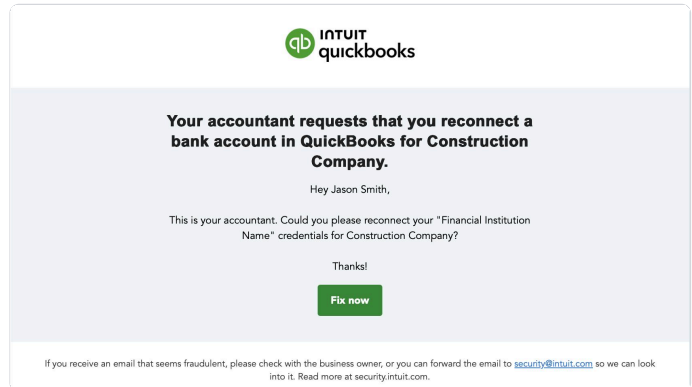
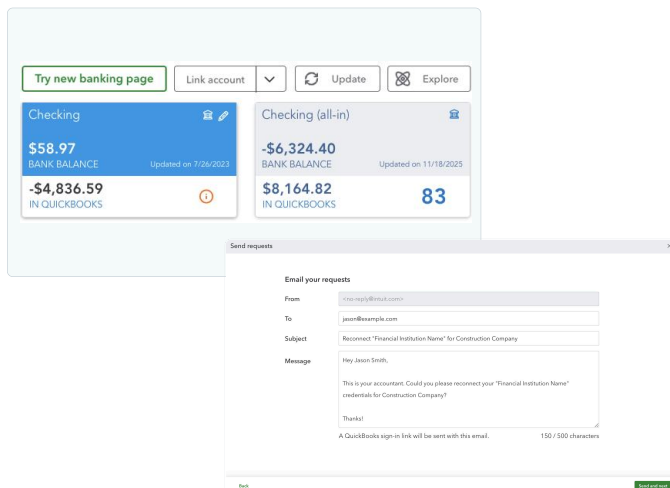
[New QuickBooks plans for small businesses](#)

[Frequently asked questions](#)

Upgraded bank connection communication

What's new?

Communicate about resolving bank connection issues as they arise, from wherever you are.



How does it work?

If a bank feed becomes disconnected, a bookkeeper can message the bank account owner to help address the issue quickly without unnecessary back-and-forth.

What are the benefits?

For your clients: Improved banking data syncing promotes accurate books and reporting

For your firm: Simplified bank connections and error recovery promotes accurate books and insights



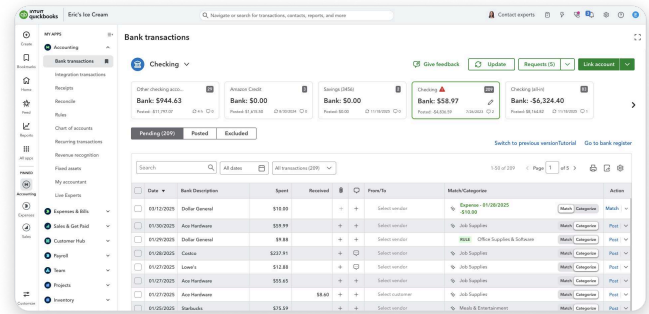
Try it out

This feature is available now in your client's QuickBooks account.

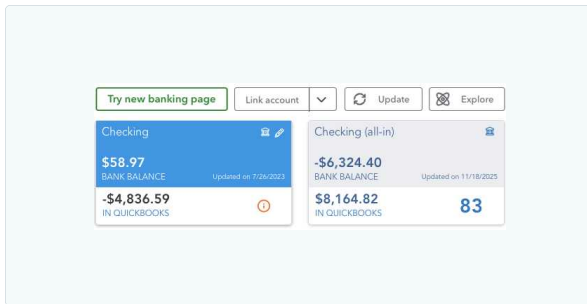
Better banking experience

What's new?

- Improved AI-powered bank feeds help make transaction management faster, easier, and more accurate.
- See AI-powered suggestions for names and transaction categories.
- Edit suppliers, categories, and classes in-line within the bank feed, and see full bank details upon hover.
- Set up notifications to your team and client for when a transaction is posted from the bank feed without a payee.
- Add attachments to transactions with drag-and-drop functionality.
- Make requests for transaction details that go straight to the right client or team member, along with follow-ups and an audit trail.



Find these improvements in the QuickBooks bank feed



How does it work?

If your client doesn't currently see these changes, they can opt in by visiting **Banking** and selecting **Try new banking page**.

Note: Be sure to let your clients know about the new AI-powered bank feed experience. It will become the default on May 8, even for customers who haven't opted in.

What are the benefits?

For your clients and firm:
More efficient banking experience



Try it out

Visit your clients' books to see these improvements. Or, [learn more](#) about these updates.

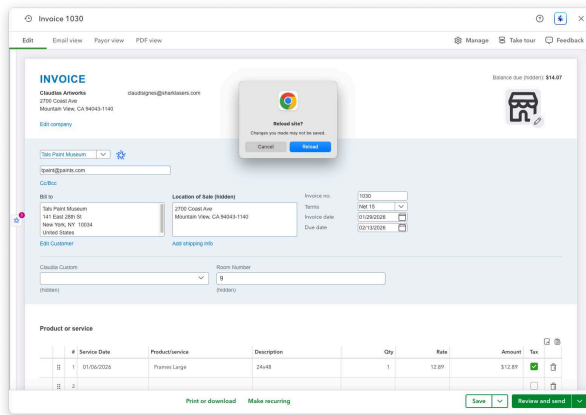
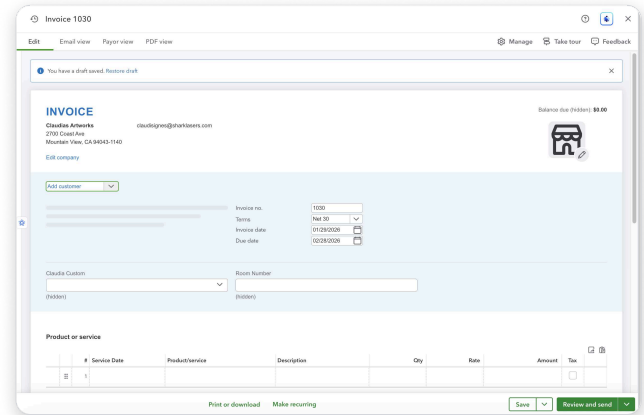
Note: If your clients previously opted out of AI bank feeds, they can [sign in](#) to QuickBooks, visit **Banking**, and select **Try new banking page**.

[Watch a demo](#)

Autosave and data protection

What's new?

- Autosave saves progress as you work.
- Pop up warnings appear before you close a tab that includes unsaved changes.
- Return where you left off with no time or work lost.



How does it work?

After enabling autosave, you and your clients can count on QuickBooks to save your progress as you work. When attempting to close a page that includes unsaved changes, a warning window will appear with an opportunity to save these changes before exiting.

What are the benefits?

For your clients and firm:
Reduced risk of lost work



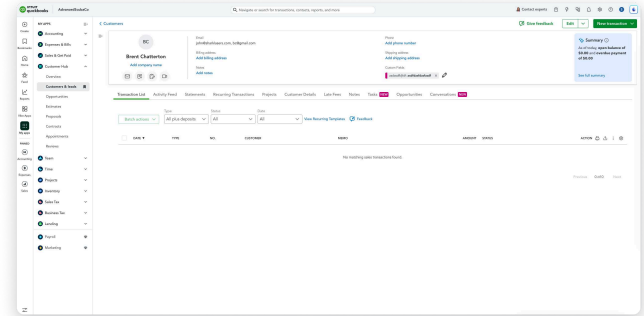
Try it out

This feature is available now in your client's QuickBooks account.

Support for multiple email addresses

What's new?

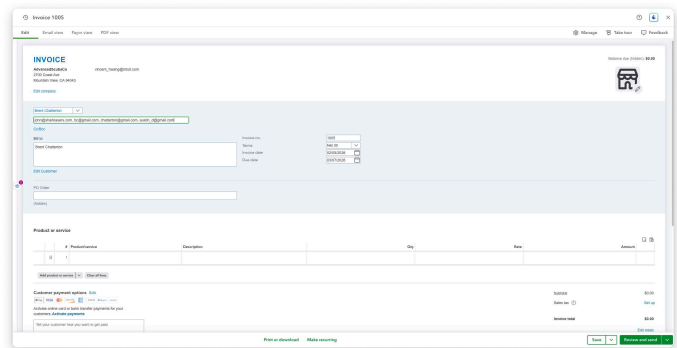
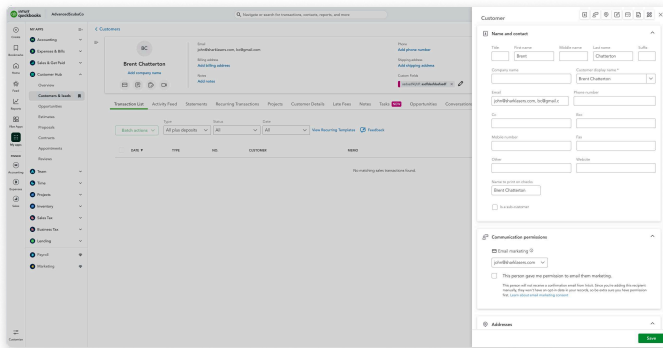
- Your clients can now store multiple shipping or delivery addresses within each customer profile.
- Avoid manual workarounds and streamline purchase order, estimate, and invoice workflows to improve overall efficiency.



Add multiple email addresses in a customer's or vendor's profile.

How does it work?

To add additional email addresses, visit a customer or vendor profile, select **Edit**, and add the contact info. Then, when creating purchase orders, estimates, and invoices, you will have the option to include any number of email addresses from the associated profile.



What are the benefits?

For your clients and firm:

Simplified communication by adding multiple points of contact for each customer or vendor



Try it out

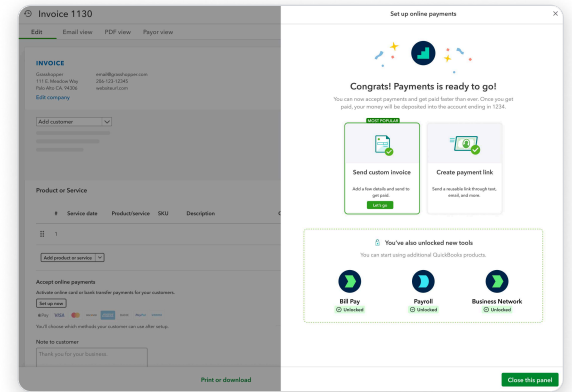
Sign in to your account and visit a customer or vendor profile to add email addresses for additional contacts.

Streamlined setup for QuickBooks Bill Pay, Payments, and Payroll



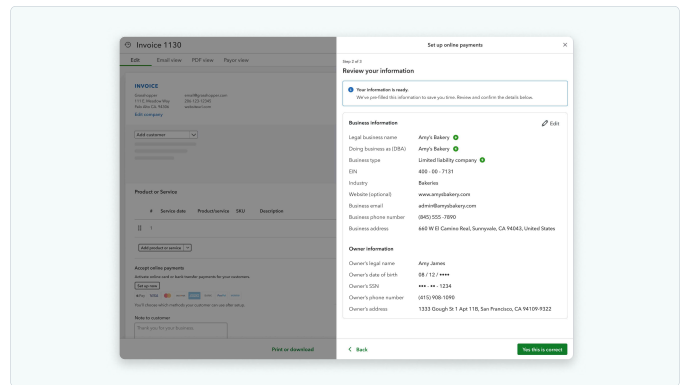
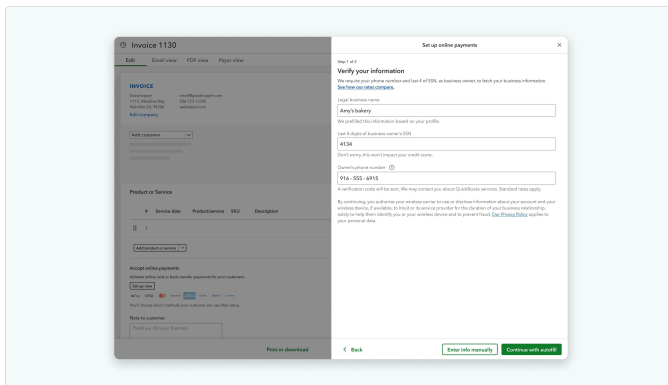
What's new?

- Businesses can now access QuickBooks Payments, QuickBooks Bill Pay, and QuickBooks Payroll through one centralized application.
- A business admin can fill out one intelligent application to be simultaneously assessed for all eligible products.
- This streamlined process can help your clients integrate more of their business's essential tools in one platform.



How does it work?

Your client no longer has to enter their EIN, SSN, address, or other info multiple times when they want to start using QuickBooks Bill Pay, Payments, or Payroll. Instead, they'll complete one form and choose to be considered for all 3 services. They can check and manually correct the prepopulated info before submission. The business admin will then see whether they're ready to subscribe to Bill Pay, Payments, or Payroll.



What are the benefits?

For your clients: Less time spent providing information, more data integration in QuickBooks

For your firm: Wider visibility of client's business data in one platform



Have your client try it out

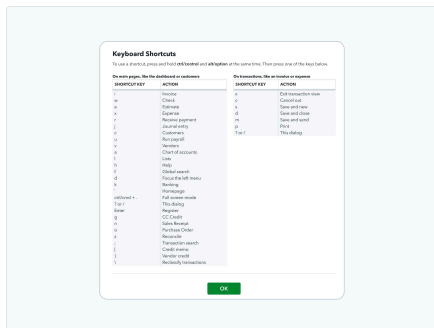
They can [sign in](#) to their account and get started with their unified application when they attempt to set up QuickBooks Bill Pay, Payments, or Payroll.

What's new?

Use improved updates to speed up data entry and move more quickly through forms, tasks, and lists.

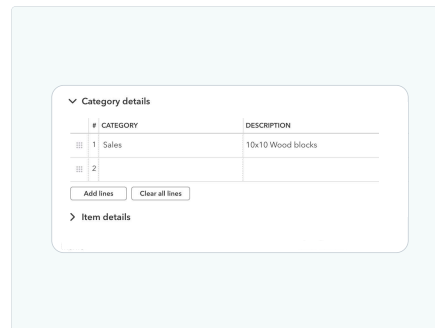


Keyboard shortcuts



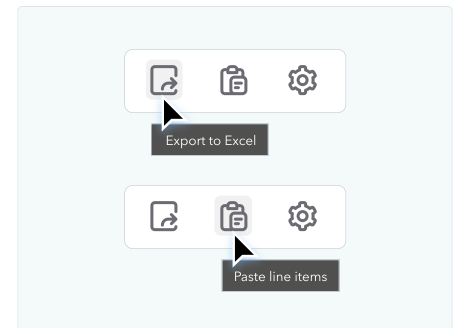
- QuickBooks now includes 50+ new standardized keyboard shortcuts to help you enter, review, and manage transactions faster.
- Use these shortcuts with banking, lists, transaction forms, reports, in main navigation, and in QuickBooks Online Accountant.
- To see the shortcuts list on a Mac, hold Control + Option + ?
- To see the shortcuts list on a PC, hold Control + Alt + ?

Expand and collapse



- Free up more screen space in bills and invoices by collapsing content sections you don't need to reference.
- These sections remain present, and you can expand them again at any time.

Export and paste



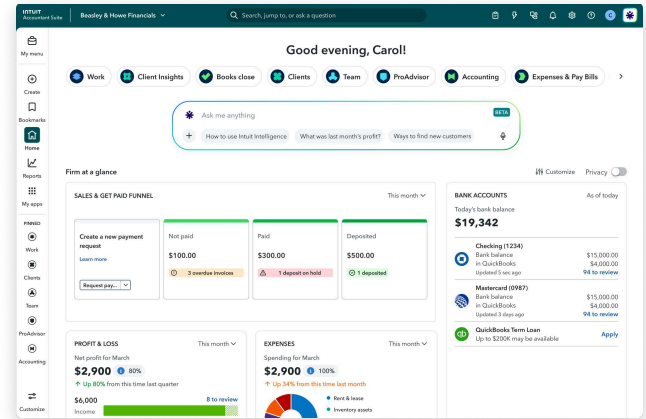
- Export line data in a single click from invoice, bill, PO, and journal entry forms into Excel or Google Sheets.
- You can analyze or work with the data in these external tools.
- Then, paste your line item(s) from Excel or Google Sheets directly into a QuickBooks transaction form.

Try it out

These features are available now in your client's QuickBooks account.

What's new?

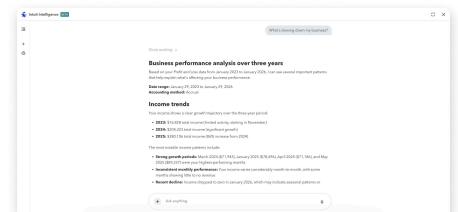
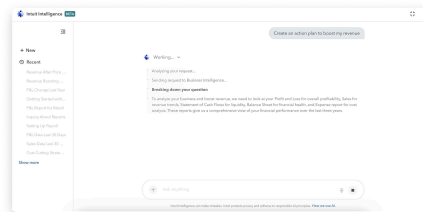
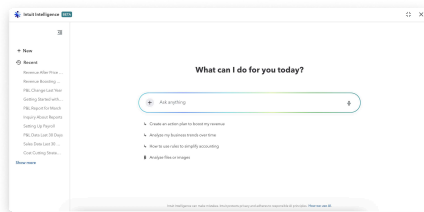
- QuickBooks now has a conversational AI interface you can use for personalized guidance in identifying potential strategies, analyzing a document, and more.
- Intuit Intelligence chat continually learns your preferences and incorporates secure Intuit datasets that include billions of transactions across accounting, payroll, and payments.
- You'll get tailored insights based on a business's size, industry, and latest data.



Find Intuit Intelligence chat on the QuickBooks home screen

How does it work?

To use Intuit Intelligence chat, type in your question or prompt. Get results at any point by submitting your question or selecting a suggestion. Intuit Intelligence will respond to your prompt and offer options to explore related topics or share the results.



What are the benefits?

For your clients: Instant, contextual answers and suggestions for any question in clear, concise language

For your firm:

- Simplified access to actionable insights that help you provide stronger advisory services
- Answers built on real data—without requiring file imports



Try it out

You or your client's admin users can [sign in](#) to QuickBooks to try Intuit Intelligence chat.

Or, see Intuit Intelligence chat in action.

Watch a demo

To help you get familiar with Intuit Intelligence chat, here are a few real-world examples of how it could help you and your clients make more confident business decisions.

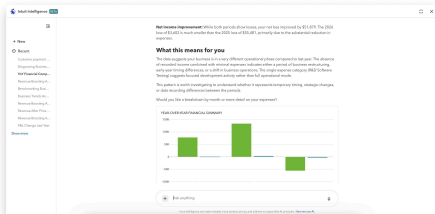
From the QuickBooks homepage, Intuit Intelligence chat can help you with:

Prompt 1:

Analyzing cash flow

Give me a YoY financial comparison 


Simplify an analysis of your client's cash flow by asking Intuit Intelligence chat for a year-over-year comparison.



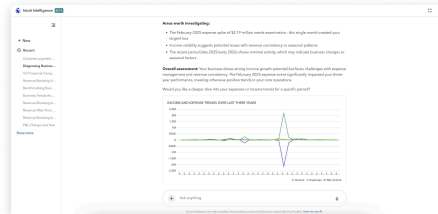
Your results will provide a straightforward comparison of cash flow, along with opportunities to learn how to promote profitability.

Prompt 2:

Investigating discrepancies

What's slowing down my business? 


Ask the chat for more information about factors that may be affecting your revenues and profits.



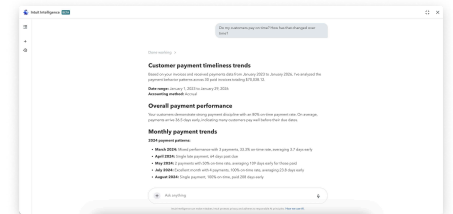
Based on the business's financial data, your results will include potential factors blocking growth and personalized suggestions to fix them.

Prompt 3:

Real-time A/R

Do my customers pay on time? How has that changed over time? 

Check how often your customers pay on time and how that impacts your A/R.



Based on the customer's overall payment performance and monthly payment trends, your results will surface their key payment behavior insights.

Learn more about Intuit Intelligence

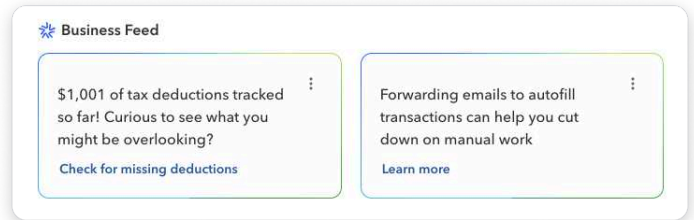
[Read our blog](#) about what these new innovations can do for your clients and your firm.

See a walk-through by Josh Aharonoff, Your CFO Guy.

Watch video

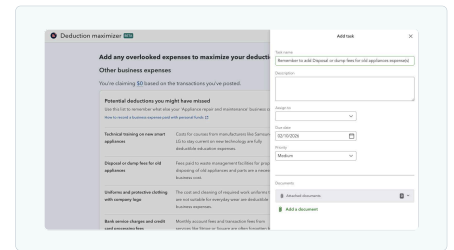
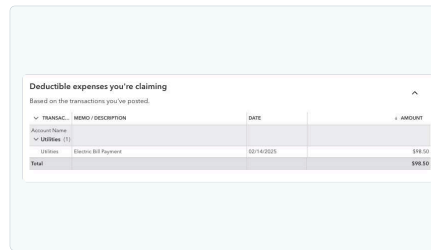
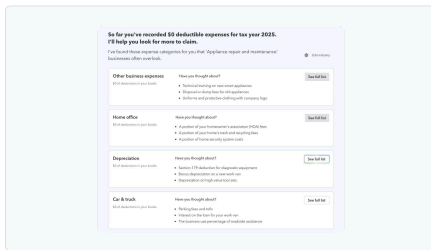
What's new?

- Business Tax AI suggests missed deductions and ways for your tax advisory clients to maximize their tax savings.
- You can set reminders throughout the year to help maintain compliance and maximize savings.



How does it work?

Based on your client's business information, Business Tax AI provides a personalized list of possible deductions that you can recommend to your clients. You can also set reminders to ensure you follow up on eligible tax deductions.



What are the benefits?

For your clients:

- Optimized tax savings year-round, without spending time on ongoing research
- Personalized suggestions to help remain tax-compliant
- Time and money savings at tax time

For your firm: Critical and money-saving tax suggestions for clients that can reinforce client relationships



**Business Tax AI: This feature is in Beta. Beta features have very limited availability and are subject to change. Features may be more broadly available soon.

Try it out

Sign in to your QuickBooks account to try Business Tax AI.

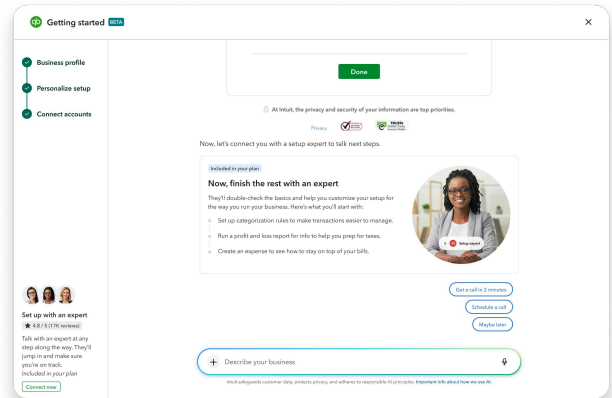
Or, see Business Tax AI in action.

Watch a demo

COMING SOON

What's new?

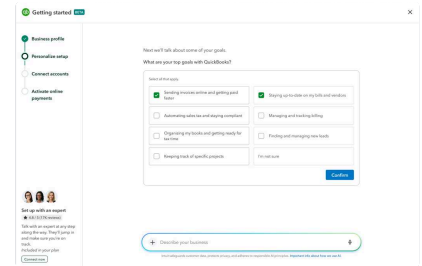
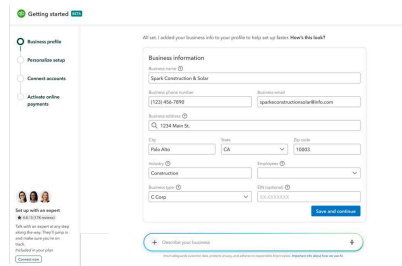
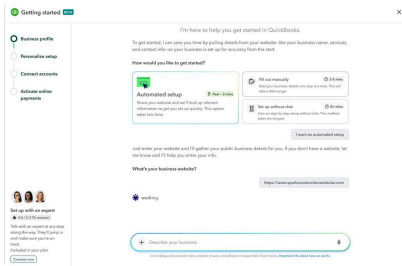
- During a client's onboarding to QuickBooks Online, they can use a conversational interface to simplify their initial setup.
- If the AI doesn't know the answer, it may redirect your client to a live expert.
- Your client can access migration and onboarding support from human experts to get started quickly, accurately, and confidently.
- In the coming weeks, your clients and team members may be able to try this functionality.



Interface graphics subject to change

How does it work?

Your client will move through a guided experience that can ease their onboarding process. They'll be prompted to add the company's website info and select their role at the company. Info will appear pre-filled in a form that your client can review and correct. Your client can choose to work with an onboarding expert or continue their own setup—by personalizing invoices, linking their accounts, setting up payroll, and more.



What are the benefits?

For your clients:

- Simplified, step-by-step process helps make onboarding less overwhelming
- Verification from a live expert helps ensure they're set up right from day one

For your firm: Guided onboarding for your client helps provide accurate data and free up your team's time



**Onboarding and migration with AI+HI: This feature is in Beta. Beta features have very limited availability and are subject to change. Features may be more broadly available soon.

Try it out

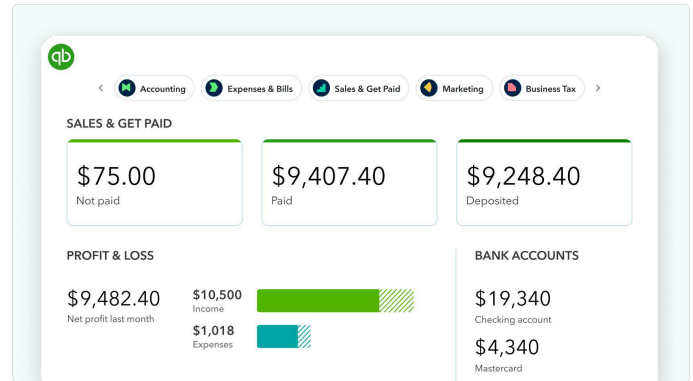
Sign in to migrate a new client and try these beta features.

Note: Your clients may or may not see this guided process, as access is still limited.

New QuickBooks plans for small businesses

What's new?

- Your clients may see newly available plans that make QuickBooks more accessible to small businesses.
- Businesses can start with QuickBooks Free and upgrade to paid QuickBooks plans to access more features and functionality.
- These plans are designed for the QuickBooks Solopreneur audience, and you'll find more details below to discuss with your clients in this range.



What are the plans my client may see?

QuickBooks Free

Organize business finances for free. Send invoices, run reports, and track income and expenses in one place to stay organized without committing to a paid plan.

[Sign up](#)

Top features

- Track income and expenses
- Accept payments from customers
- Send 2 invoices per month
- Connect 1 bank account
- Manage 1 contractor
- Run the top 3 reports
- Upload 2 receipts per month

QuickBooks Lite

Automate self-employed bookkeeping—including transactions, bills, and sales tax.

[Buy now](#)

Top features

- **Everything in QuickBooks Free, plus:**
- Maximize tax deductions
- Automate bill pay and sales tax tracking
- Use unlimited invoices, receipt uploads, mileage, and expense tracking
- Connect 2 banks
- Manage 3 contractors
- Access via mobile app

QuickBooks Lite + Expert Assisted Tax

Prep and file taxes seamlessly. Pair live expert tax help powered by TurboTax for 20% off at filing with self-employed bookkeeping.

[Buy now](#)

Top features

- **Everything in QuickBooks Lite, plus:**
- Prepare and file tax returns
- Access audit support
- Get 100% accuracy and your best tax outcome—guaranteed
- Automatically apply bookkeeping data to taxes
- Receive tax advice year-round

Learn more

Get more detail on the new plans for self-employed businesses.

Note: Not all businesses will see the new plans.

[Compare new plans](#)

Frequently asked questions



Find answers to common questions about the latest QuickBooks updates.

What will these updates cost me?

Your current plan price will not change with these updates. Unless otherwise stated, every feature is included in QuickBooks. Specific capabilities may vary by QuickBooks plan.

How often can I use Intuit Intelligence chat?

Each QuickBooks plan includes 25 prompts per month, with the option to purchase more. **Note:** Intuit Intelligence chat is not available in QuickBooks Ledger.

Do I have to use AI bank feeds?

No, not at this time. However, we strongly encourage opting in and becoming familiar with this feature, as all QuickBooks accounts will otherwise automatically move to AI bank feeds in May 2026.

Can my client upgrade from QuickBooks Free to a paid plan like QuickBooks Simple Start?

Yes.

What other resources are available?

You can reference the initial resources below. More will soon be available on quickbooks.com.

- Read more about these updates in "[Foundational improvements & Intuit Intelligence](#)" on Firm of the Future.
- See a [video demo of the new QuickBooks](#) that you can share with clients.

Stay up to date with the new QuickBooks

Explore QuickBooks updates