

# A firm’s guide to our updates

**You are our customer.** In this release, we continue to invest in your growth, at every stage—helping you build capacity, grow advisory services, and connect with businesses that need your expertise.

With the addition of your expertise, Intuit Intelligence becomes the unified platform that fuels your clients’ and firm’s success.

This release also demonstrates our sharpened focus on everyday workflows and reliable performance you can count on.

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Release updates

# intuit accountant suite

# You ask, we innovate

# intuit accountant suite

 Available in all Intuit Accountant Suite plans

**You are the human intelligence that differentiates our platform.** AI surfaces insights, automates work, and creates capacity. You bring the judgment, context, and relationships that turn intelligence into better client outcomes.

Behind every innovation is our goal to help your work fuel the success of your firm and clients. That's why we listen to your feedback and build the updates you need. Below are just a few of the results from your input.



## Speed you can feel

- Stay more ready to run your firm's complete book of business with fast load times across your client list.
- Get started right away with a Home dashboard that loads quickly.



## Critical data consolidation

- Centralizing your client list in Intuit Accountant Suite for the first time is simpler, with less risk of data loss.
- Roster, roles, documents, custom/firm-only reports, and inactive clients come through, with a batch limit expansion from 100 to 500.
- You'll get an audit trail of what was moved, skipped, or needs follow-up.



## More detail in your client list

- Understand your next steps at a glance with new client list columns: lead accountant, unposted transactions, bank connections, workforce/payroll, close date, tax indicator, and Prep for Taxes action.
- Use consistent filters for disassociated and inactive clients across your client list, user groups, and user list.



## Cleaner client records

- Get one clean record for each client with a more accurate sync—and no more duplicates.
- Make matches manually as needed.
- Unblock ProConnect Tax client merges and fix misidentification.

## Try them out

These updates are available now.

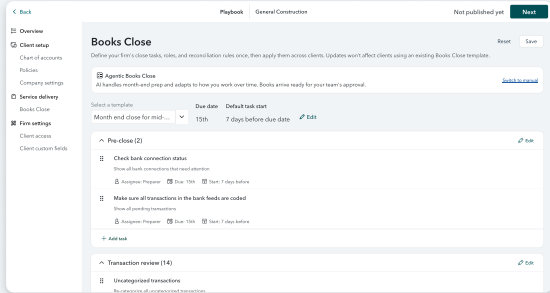
[Learn more](#)

# Agentic Books Close

PILOT\*\*

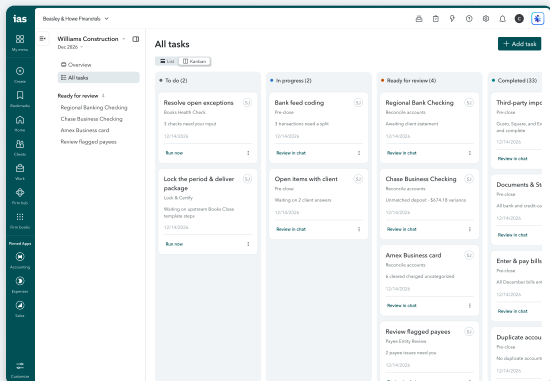
# intuit accountant suite

Available in Intuit Accountant Suite Core, Intuit Accountant Suite Accelerate



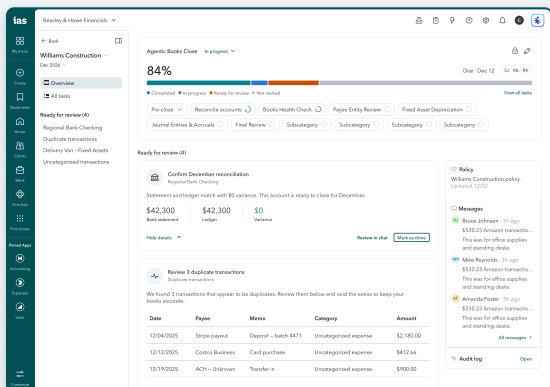
## What

- AI handles month-end prep based on your firm's standards, tracking actions in an audit log, and adapting to your way of working over time.
- Books come ready for approval. Your team supervises, reviews, approves, and manages exceptions.
- Apply firm standards seamlessly across clients, and customize tasks unique to each.
- Now available at no cost:** Manual Books Close **BETA\*\*** helps you complete month-end close workflows with tools that include file review, custom templates, anomaly detection, multiple assignees, and transaction-review collaboration across clients.



## How

- AI posts pending bank transactions and reconciles accounts. Along the way, it flags exceptions, potential fixed assets, prepaid expenses, and other accruals for review.
- Items for review will appear in a firm-wide queue. Once approved, they're posted right away.
- AI generates reports for your review including Variance Analysis and AP/AR Aging, and it builds a monthly financial package you can send to clients.
- You'll get a transcript of the AI's recommendations and completed tasks.



## Why

For your firm:

- Accountants get time back while closing books consistently and at greater scale.
- Teams stay in control without getting in the weeds.
- Reduce the need to add headcount by having accountants handle decisions while AI automates routine steps at high volumes.
- Improve visibility and completion of approval tasks by receiving them in a firm-wide queue.
- Every action is auditable, reversible, and defensible to help your firm stay audit-ready.

\*\*Pilot features have limited availability and are subject to change.

## Access the beta

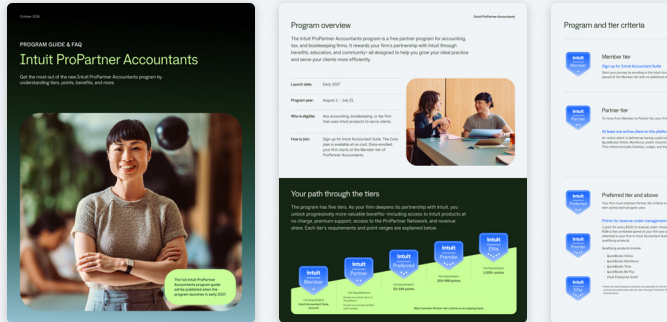
Agentic Books Close is a pilot available at no cost for existing Intuit Accountant Suite users. To continue access after the beta, a paid add-on will be required.

Learn more

# Intuit ProPartner Accountants certification reminder

Available in Intuit Accountant Suite Core, Intuit Accountant Suite Accelerate

intuit accountant suite

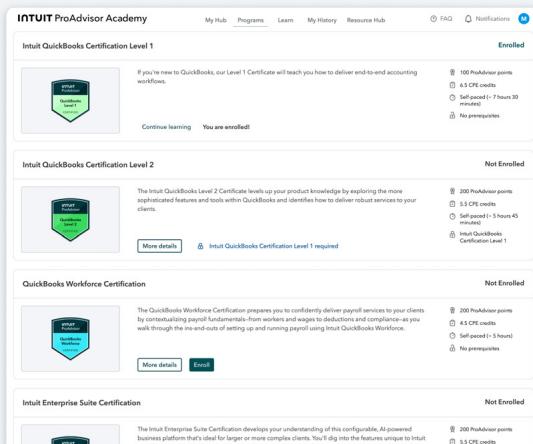


## What

- In January 2027, Intuit ProPartner Accountants will replace the ProAdvisor Academy program.
- Intuit ProPartner Accountants will have 5 tiers of benefits, from Member to Elite Partner. Several benefits will be available to all participating firms, and the program includes exciting new additions to reward your engagement with Intuit products.
- Learn more about tiers and benefits with our [website](#) and [program guide](#).
- For your firm to access a higher tier than Member, you'll need at least 1 Intuit-certified team member.

## How

- To help your firm achieve a beneficial tier when the new program launches, have at least 1 team member get Intuit-certified by that time.
- Your team can visit the [ProAdvisor Academy](#) and take any one of the following qualifying courses:
  - QuickBooks Online (level 1 or 2)
  - QuickBooks Workforce (formerly Payroll)
  - Intuit Enterprise Suite
- You can test out of a course by passing its exam, which can take as little as 45 minutes.



## Why

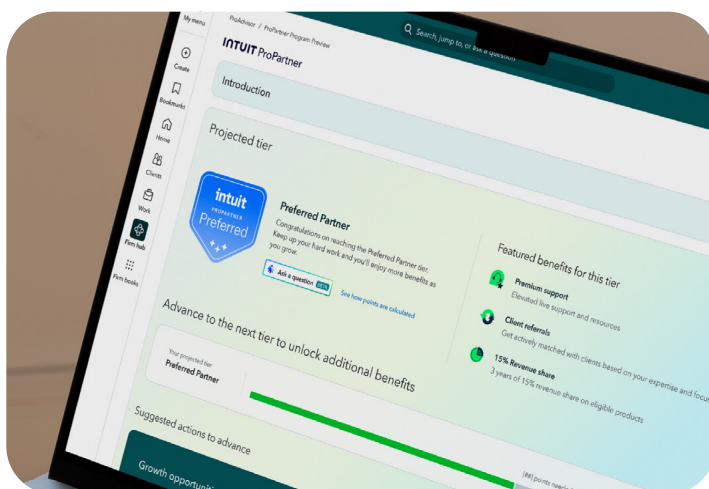
For your firm:

- When the program launches, firms by default will start at the Member tier, which unlocks benefits such as ProPartner Preferred Pricing for you and your clients, select free software plus complimentary training, and certifications for your firm.
- To unlock the Partner tier and above and access more meaningful benefits, you must certify at least one team member in your firm.
- Certification demonstrates your team's expertise to clients and employers, which can help open doors to more advisory work, higher billing rates, and more client engagements.

## Prep your firm for launch

Take a certification course today at the ProAdvisor Academy.

Take a course



# Release updates



# QuickBooks enhancements based on your feedback

 Available in all QuickBooks plans

## Investing in reliability

The more QuickBooks does for your book of business, the more you need reliable workflows and tasks that are ready when you are.

Because core workflows create the greatest efficiencies in your work, that's one of our two main focal points in this release.



### Bank connections that stay put

- Bank feeds sync more reliably, even when the same connection is used across multiple QuickBooks companies.
- Connections stay authorized through data refreshes, without interrupting your work.
- Proactive notifications show you what to resolve to keep transactions flowing.



### Mobile that keeps up with you

- Get up and running faster with the QuickBooks mobile app, no matter where you work.
  - Bank connections sync more reliably on mobile.
  - Trip and mileage tracking is more accurate.
  - Invoicing runs more smoothly, and receipt capture is smarter.



### A clearer home base

- The home screen is quicker to scan and move around, with more personalization, cleaner widgets, and streamlined navigation.
- Enhanced bookmarks let you quickly get back to your most-used reports from a dedicated panel, with your bookmarks saved across sessions.
- A new global panel puts key tools within reach, all shaped around how you work, so you can get things done faster.



### Reports you can count on

- Toggle debit/credit columns on transaction reports across sessions.
- Get a heads-up when a report may be out of date, along with a one-click refresh.
- Period comparisons resolve to full calendar periods, showing exact date ranges and difference in dollar amount or percentage.
- Balance Sheet and Profit & Loss reports exported to Excel include groupings you can expand and collapse, rather than long indented lists.

## Try them out

These enhancements are available now. Share [the updates](#) with your clients.

[Learn more](#)

# QuickBooks enhancements based on your feedback

intuit  quickbooks

 Available in all QuickBooks plans

## Sharpening focus on accuracy

For cleaner books and the confidence to let QuickBooks do more for your firm and clients, you need complete trust in the accuracy underneath it all.

Because accuracy has the greatest impact on your work, that's one of our two main focal points in this release.



### Your bank and books in balance

Intuit Intelligence automatically matches your clients' transactions and flags any discrepancies between your books and bank, so you can reconcile faster with less manual work.\*\*



### More streamlined refunds, deposits, and payouts

- Getting money out is simpler.
- Refunds are easier to complete and automatically default to the original payment method.



### Payroll that gets it right\*\*

- Payroll posts correctly to your books, without extra work.
- Record and file taxes for past paychecks directly in product, no workarounds needed.



### Modern reports that add up

- Reports now give you a more accurate and intuitive experience with less friction and more insight.
- Smarter comparisons automatically detect the right prior period.
- Budget reports match your expectations.
- Customizations stay as you set them.

Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.

\*\*Intuit Intelligence: Intuit Intelligence can make mistakes. Intuit protects privacy and adheres to responsible AI principles.

\*\*QuickBooks Workforce: Sold separately. QuickBooks Workforce features and functionality vary by plan, which are subject to change. Certain features are available only with Workforce Premium or Elite, or may require additional fees. For details, see [quickbooks.com/workforce](https://quickbooks.com/workforce)

## Try them out

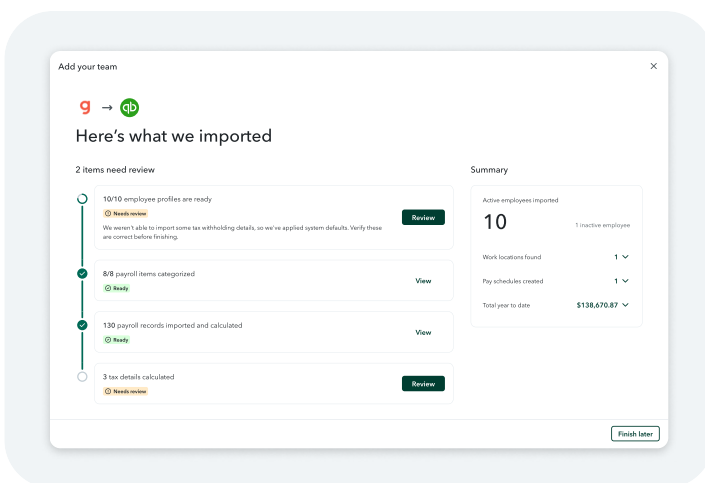
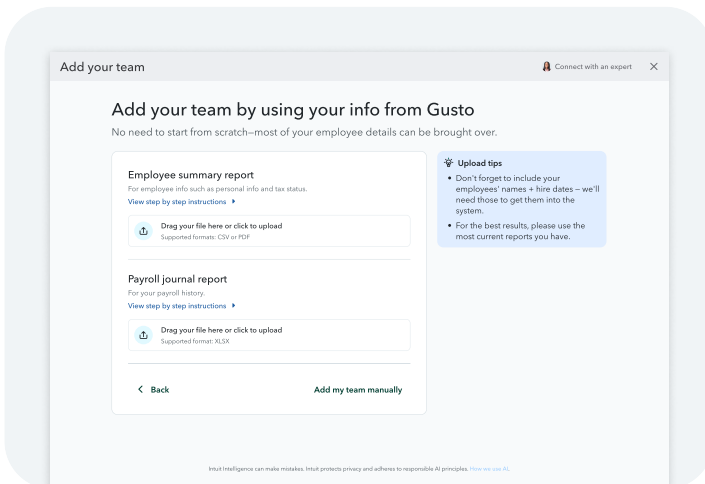
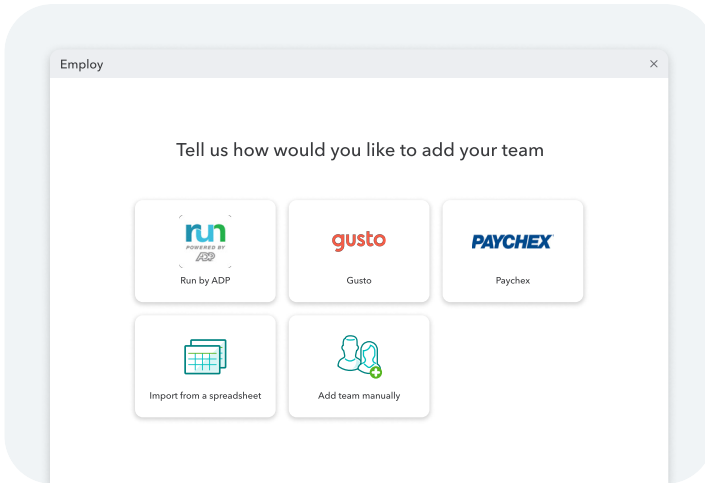
These enhancements are available now. Share [the updates](#) with your clients.

Learn more

# Moving clients to Workforce from Gusto or ADP

intuit **qb** quickbooks

 Available in all QuickBooks Workforce plans



## What

Switching clients from QuickBooks Workforce from ADP or Gusto no longer requires manual entry of employee records or pay history.

## How

- In **Workforce**, import your client's employee and payroll data reports from ADP or Gusto.
- After import, AI completes data extraction, structuring employee records and a full year-to-date pay history.
- Then, an Intuit expert reviews and resolves exceptions, verifying accuracy by catching what automation alone cannot—like duplicate deductions and tax edge cases.
- You or your client complete any flagged fields in one review grid.

## Why

For your firm:

- Cut out the most tedious part of a client payroll migration—manual re-entry of employees and YTD history.
- Expert verification protects the numbers that save your team the most time, like YTD wage and tax totals that flow into quarterly filings and W-2s.

## See it today

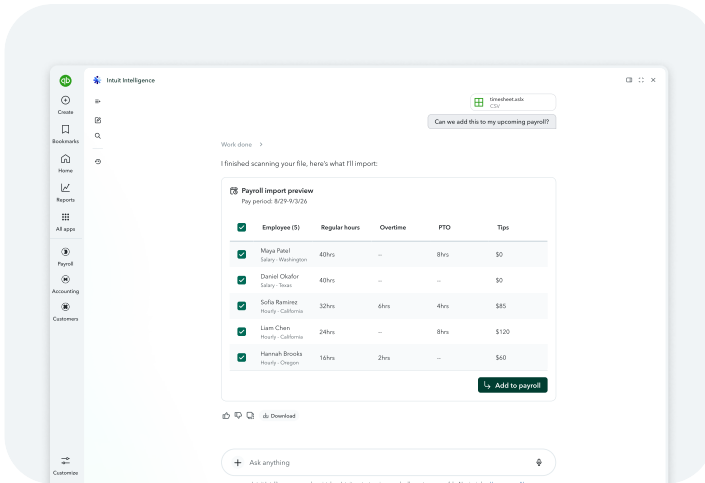
Plus, get more info on this Workforce update.

Learn more

# Run payroll from Intuit Intelligence chat and QuickBooks mobile

intuit **qb** quickbooks

Available in all QuickBooks Workforce plans

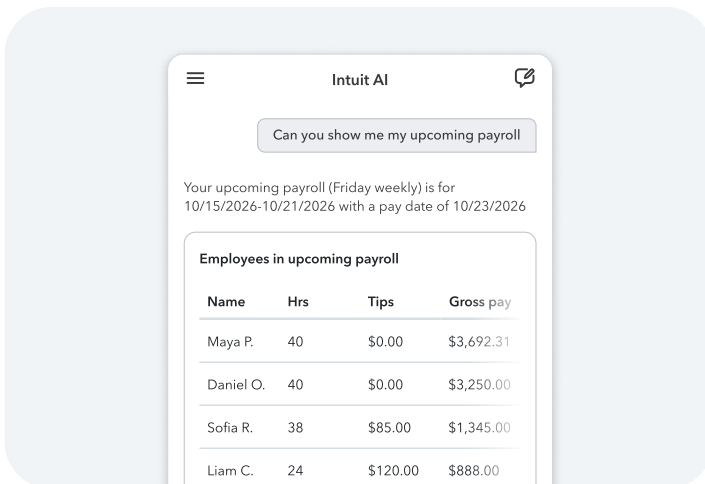


## What

- You and your client can now prepare their payroll run through QuickBooks mobile using Intuit Intelligence.
- Intuit Intelligence can also help them understand and get support on any tax notices they receive.

## How

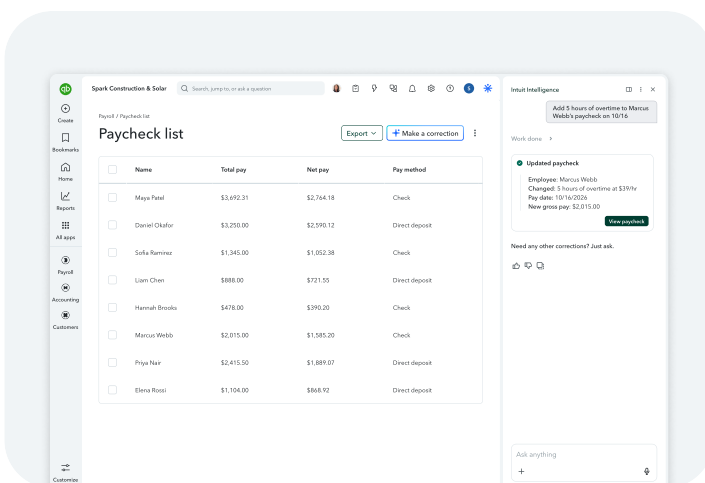
- You or your client can start a payroll draft within Intuit Intelligence chat—even through QuickBooks mobile.
- Add hours, edit them, review, and ask follow-up questions to make sure everything is correct and accounted for.
- In **Workforce Premium or Elite**, upload payroll data as a CSV or Excel file. Intuit Intelligence extracts the data and requests clarification as needed.
- Review the imported data in the review table. Confirmed data is added to your client's payroll.
- If you get a tax notice, upload it to Intuit Intelligence to receive a summary and support from a tax expert on how to resolve it.



## Why

For your firm and clients:

- Run payroll from anywhere with confidence.
- Alleviate the stress of running payroll correctly and on time by keeping payroll data centralized and accessible through a chat.
- Skip more manual entry—have data filled in for you when preparing payroll.



## Try it out

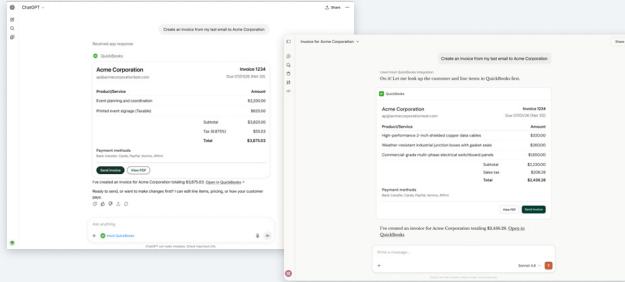
You or your client's admin users can [sign in](#) in to QuickBooks to try Intuit Intelligence chat.

Sign in

# Add Claude or ChatGPT to invoicing workflows

intuit **qb** quickbooks

Available in all QuickBooks Online plans with QuickBooks Payments



## What

You and your client can create invoices through ChatGPT or Claude that get logged in QuickBooks automatically.

## How

- You or your client will need to connect [Claude](#) or [ChatGPT](#) to your their QuickBooks Online account.
- Use Claude or ChatGPT to ask for assistance in drafting invoices, estimates, payment links, or reminders. For example, "Invoice the Reyes job I finished today and remind anyone who's overdue."
- AI gathers context from QuickBooks and your client's connected tools (like their calendar, email, bank feeds, etc.) to complete the requested task.
- You or your client can then edit and approve the drafts. These items won't be sent without approval.
- QuickBooks automatically records the invoice, payment, and reconciliation.

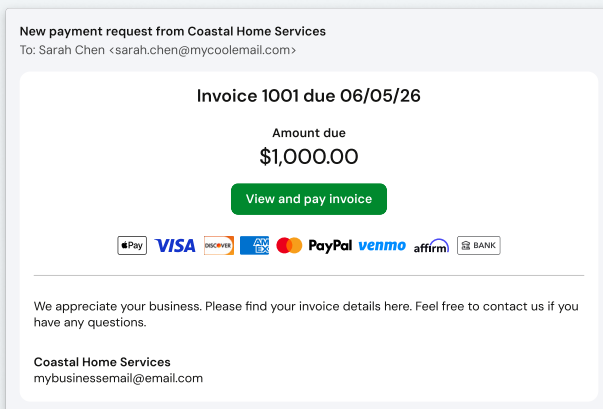
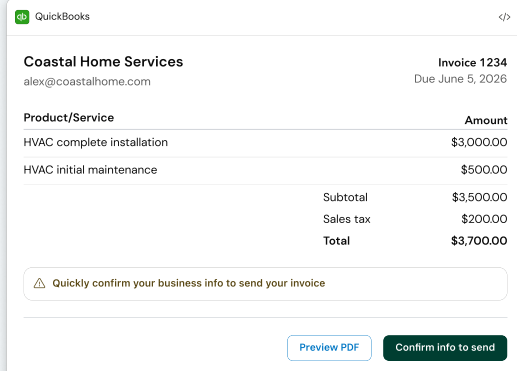
## Why

### For your clients:

- Get paid faster by sending an invoice or payment link directly from Claude or ChatGPT the moment a job wraps up.
- Save time by creating and sending invoices in bulk.
- Stay in control knowing estimates, invoices, payment links, and reminders won't go out without approval.

### For your firm:

- No more matching payments by hand—each payment from invoices sent through Claude and ChatGPT is recorded in QuickBooks.
- Add more access to real-time visibility into what's been paid and what's outstanding—so you always know where your client's cash stands.



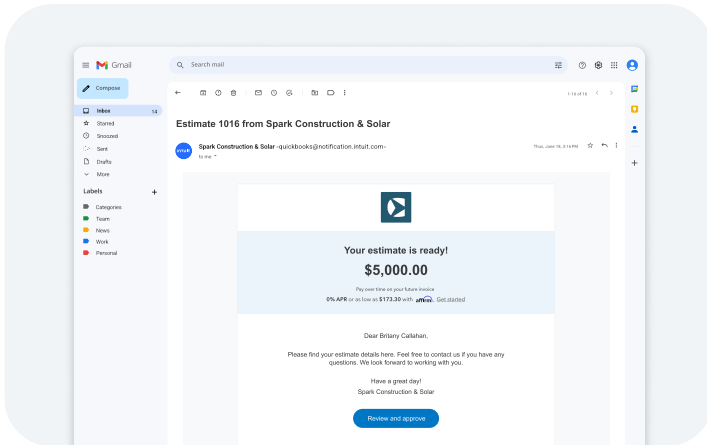
## Try it out

If needed, find out how to connect QuickBooks to [ChatGPT](#) and to [Claude](#).

# Affirm buy now, pay later available in more places

intuit **qb** quickbooks

 Available in all QuickBooks Online plans with QuickBooks Payments



## What

- Your client can offer Affirm's buy now, pay later as a payment option in estimates, recurring invoices, and payment links. Getting paid with Affirm carries the same processing fees as our standard credit card rates.
- Your client can also add the buy now, pay later option to all invoices when creating them in batches.
- Clients' customers will see the "Pay over time" financing option in communications about their estimates, invoices, and payments.

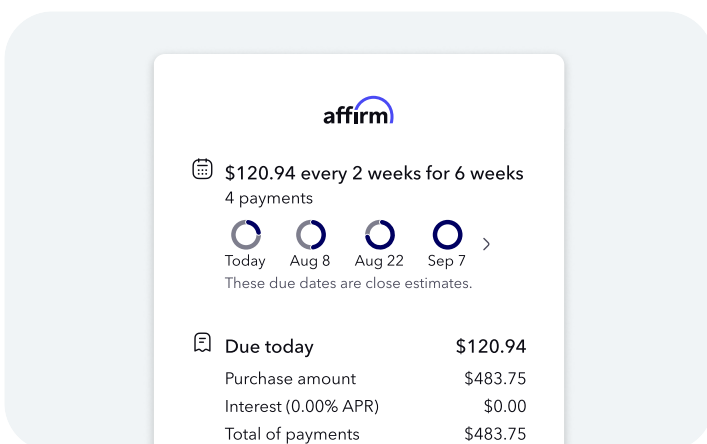
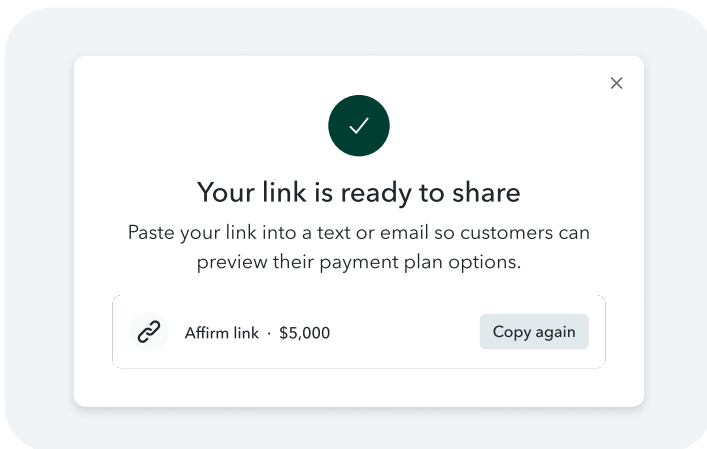
## How

- When creating an estimate, you or your client can turn on the option to accept Affirm buy now, pay later.
- If you or your client sends estimates outside of QuickBooks, you can still create and share a separate buy now, pay later link for customers who request financing.

## Why

### For your clients:

- Offering financing options to customers can help clients stay competitive and increase conversion.
- Clients get paid up front at the standard credit card rate, without taking on any repayment risk.



Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.

**QuickBooks Payments:** QuickBooks Payments account subject to eligibility criteria, credit, and approval. Subscription to QuickBooks Online required. Not available in U.S. territories or outside the U.S.

**Affirm Buy Now, Pay Later:** Payment options through Affirm are subject to an eligibility check and are provided by these lending partners: [affirm.com/lenders](https://affirm.com/lenders). For example, a \$1,000 purchase might cost \$90.26/mo over 12 months at 15% APR. Options depend on the purchase amount, and a down payment may be required. Affirm availability and eligibility may vary. Restrictions apply. See [affirm.com/terms#use](https://affirm.com/terms#use). For licenses and disclosures, see [affirm.com/licenses](https://affirm.com/licenses).

## Share the details

Help your clients learn more about Affirm payment options.

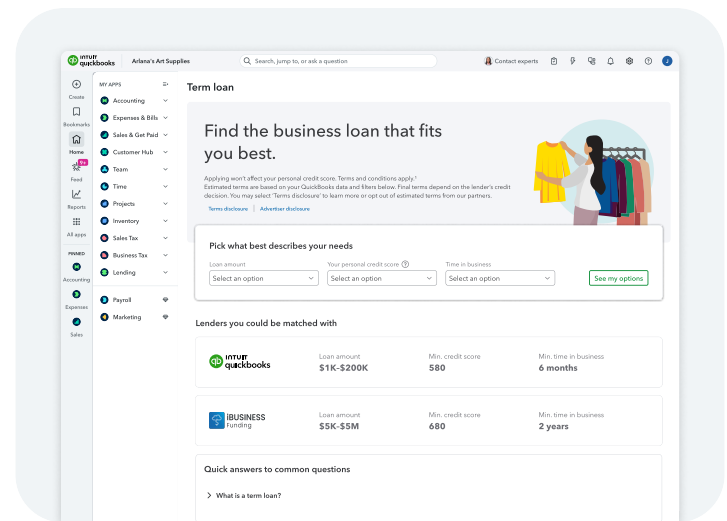
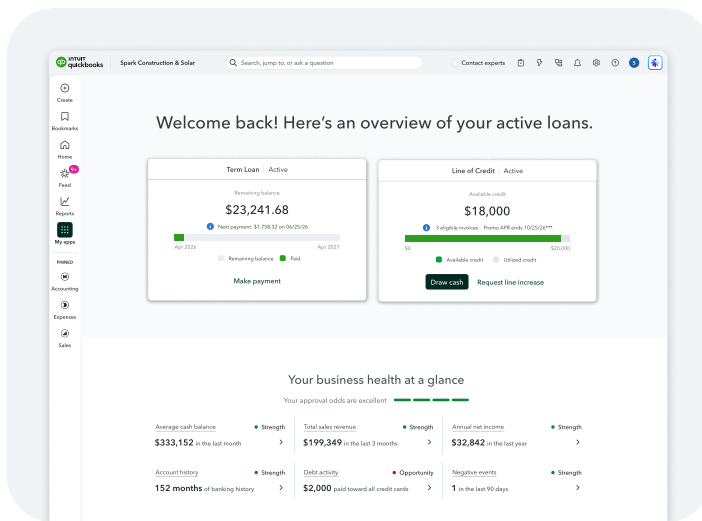
Learn more

# Compare a client's lending options

intuit **qb** quickbooks

Available to all eligible QuickBooks customers

Your client's real-time financials can be used to help them find more lending options that fit their needs.



## Business health for lending

- Your clients can get added clarity about how their finances may affect their eligibility and access to available funding options.
- Real-time financial analysis helps your clients better understand the factors that impact their approval odds,\*\* as well as how to continue strengthening them over time.
- See potential funding options up front. If approved, your clients can typically access funds within 1-2 business days.\*\*

## Trusted partner lenders BETA\*\*

- Some of your clients may have access to an updated experience providing a smoother, faster path to funding with trusted lenders.
- In this experience, participants can be evaluated for all lending options at once through a controlled online environment known as a data clean room.
- Through our network of trusted lenders, businesses can access lines of credit up to \$250k, term loans up to \$500k, and SBA 7(a) loans up to \$5M.
- Your client can match with vetted partner lenders when their first option is not a fit, with no impact to their personal credit score.
- Note:** Matches are not offers. Formal offer details are dependent on application submission and underwriting decisions.

QuickBooks Term Loan and QuickBooks Line of Credit loans are issued by WebBank.

\*\*\***Approval odds** refers to the likelihood of approval for QuickBooks Term Loan or Line of Credit.

\*\***QuickBooks Term Loan and QuickBooks Line of Credit loans are typically deposited within 1-2 business days.** Actual funding time can vary depending on third-party processing time.

\*\***Beta features** have limited availability and are subject to change.

## Get the details

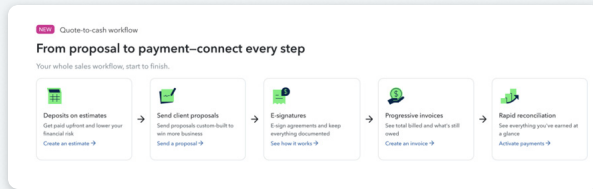
Learn more about lending options for your clients and help them get started.

Learn more

# Proposal-to-paid

intuit **qb** quickbooks

Available in QuickBooks Online Simple Start, Essentials, Plus, and Advanced plans with QuickBooks Payments



## What

- Project-based clients can pitch the work, close the deal, and get paid, all in QuickBooks.
- Connect proposals, estimates, e-signatures, deposits, invoices, and payments in one workflow.
- Carry pricing and line items from the linked estimate into the invoice without entering the same information again.

## How

- Your client creates a proposal outlining the scope of work and terms and links an estimate with pricing.
- They can request an e-signature and an upfront deposit directly on the estimate.
- Their customer reviews, signs, and pays the requested deposit online from one link.
- QuickBooks records the paid deposit as a liability.
- When your client converts the linked estimate into an invoice, QuickBooks automatically applies the deposit—leaving the remaining balance due.

## Why

### For your clients:

- Secure upfront cash to help fund the job and make it easy for customers to review, sign, and pay.
- Keep work moving from proposal to payment without duplicate entry.

### For your firm:

- Payments collected through QuickBooks Payments automatically update your clients' books and help reduce manual matching.
- Keep billing and payment records connected so your clients' activity is easier to review.

Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.

**QuickBooks Payments:** QuickBooks Payments account subject to eligibility criteria, credit, and approval. Subscription to QuickBooks Online required. Not available in U.S. territories or outside the U.S.

## Try it out

This update is available now.

Learn more

# Vendor credits

intuit qb quickbooks

Available in all QuickBooks Online plans with QuickBooks Bill Pay

| DATE     | REF NO. | AVAILABLE  | APPLYING |
|----------|---------|------------|----------|
| 01/03/25 | cm-1038 | \$400.00   | \$400.00 |
| 01/04/25 | -       | \$800.00   | 0.00     |
| 01/05/25 | cm-1040 | \$1,900.00 | 0.00     |

## What

You and your clients can now apply vendor credits while scheduling a QuickBooks Bill Pay payment, rather than using separate steps or workarounds.

## How

- **Pay bills** now lists each available vendor credit, with date, reference number, and available balance.
- Your client can select which vendor credits to apply and how much of each credit.
- The applied credit details will appear in **Schedule payment**.
- The email and remittance advice to your client's vendor will show the applied credit(s).

## Why

For your clients:

- Rather than relying on paper checks, outside tools, or partial payments, your client can apply a credit and pay a bill in a single, time-saving step.
- Clients control which credits go to which bills, rather than only seeing the total credit amount.
- Detailed communication between your clients and their vendors adds clarity and transparency to their work together.

Payment on the way - \$14,600.00 from Jordan's Coffee

**A payment from Jordan's Coffee is on the way**

\$14,600.00 will arrive in your bank account by 02/09/2025.  
\$400.00 credits were applied.

|                      |                             |
|----------------------|-----------------------------|
| From                 | Jordan's Coffee             |
| Amount paid          | \$14,600.00                 |
| Credits applied      | \$400.00                    |
| Total payment amount | \$15,000.00                 |
| Number of invoices   | 3                           |
| Deliver to           | Citibank Checking (...4600) |
| Scheduled on         | 02/06/2025                  |

## Try it out

Plus, get more info on how to enter vendor credits.

Learn more

# QuickBooks Online Advanced November release preview

intuit  quickbooks

 Upcoming in QuickBooks Advanced

Upcoming innovations releasing this fall bring more capabilities in-platform, provide more granular data, and enhance industry-specific functionality.



## Inventory features

- **Available now:** Inventory workflows in Advanced help keep item costs and stock status live, without a side conversion spreadsheet. Features include: FIFO / Weighted Average Costing (WAC); item receipts, partial receiving, multi-currency; Inventory Valuation reports; reorder points and alerts; sales orders linked to purchase orders; reusable PO templates
- **Coming soon:** Inventory value adjustments, units of measure



## Industry solutions

- **Available now:** Construction clients can bring subcontractors and projects over together with report filters for project-based work
- **Coming soon:** Sharper control over complex builds, including multilevel job hierarchies.



## Accounts receivable and payable

- **Available now:** Custom invoices at scale and built-in Bill Pay Elite\*\* post to one ledger



## On-demand demo sandboxes

- **Coming soon:** For your next client conversation, launch a QuickBooks Online Advanced or Intuit Enterprise Suite demo prefilled with sample data that matches their industry—for training or trying out a new workflow risk-free. Nothing is saved, so each demo starts fresh.
- **Note:** Demo sandboxes include sample industry-specific data for 7 industries and are not industry editions.



## Reporting

**Coming soon:** New reports like Stock Status by Site and Vendor, Aging Summary, Payroll Items Detail, and Employee Earnings

This information is intended to outline our general product direction, but represents no obligation and should not be relied on in making a purchasing decision. Additional terms, conditions and fees may apply with certain features and functionality. Subject to change or discontinuation without notice.

\*\*QuickBooks Bill Pay Elite: Subject to eligibility criteria, credit, and approval prior to first payment. Subscription to QuickBooks Online Advanced required. Bill Pay Elite is included with QuickBooks Online Advanced when purchased directly from QuickBooks.com or QuickBooks Sales. Not available in U.S. territories or outside the U.S. Limits may apply on total number and amount of payments.

Additional updates

**intuit** accountant suite

**intuit** enterprise suite

# Additional updates

## Key dates

Please note these important upcoming dates:

- **QuickBooks Online Accountant**

As of December 31, 2026, QuickBooks Online Accountant will no longer be available. Firms that haven't made the switch to Intuit Accountant Suite may be automatically upgraded to the free Intuit Accountant Suite Core plan. [Read our guide to switching.](#)

- **Intuit Accountant Suite Accelerate**

In early 2027, the Accelerate plan of Intuit Accountant Suite will become a premium, paid offering. [Learn more](#) about this change and [compare](#) Intuit Accountant Suite plans.

## intuit accountant suite

### Proposal-to-paid

Send polished proposals your clients can sign online (beta\*\*) along with automatic reminders for signatures and payments. Get authorization for ACH, cards and other payment methods along with proposal acceptance, so your one-time and recurring bills are paid automatically.

### Intuit Business Credit Card for firms

You can apply for the Intuit Business Credit Card right in Intuit Accountant Suite, to help your firm access additional capital with no impact to your personal credit score. Plus, transactions integrate seamlessly with your firm's financial data. To help you reinvest in your business, the Intuit Business Credit Card features:

- No annual fee\*\*
- 5% back on Intuit products and services\*\*
- Unlimited 2% cash back on everyday purchases\*\*

## intuit enterprise suite

### Intuit Enterprise Suite product release

With this release, the platform moves forward on 3 fronts: the depth to run more of your industry in your books, the scale to add entities and currencies as you grow, and the freedom to move off QuickBooks Desktop without leaving your history behind. Through all of it runs one commitment—more command of your business, without giving up the control, history, or clarity you depend on.

See all the latest updates to Intuit Enterprise Suite in our [Fall product release](#).

\*\*Beta features have limited availability and are subject to change.

\*\*No annual fee: See Intuit Business Credit Card [Cardholder Agreement](#).

\*\*5% cash back on purchased Intuit products and services does not include transactional fees (ex: merchant services). All other completed purchases will receive 2% cash back. All cash back for bonuses and rewards will be applied in the form of a statement credit to your Intuit Business Credit Card account. Earn the \$300 bonus after you spend \$3,000 in purchases within the first 3 months of account opening. Closed accounts with cash back balances may be forfeited. See Rewards Program Terms for details. The Intuit Business Credit Card cannot be used to pay other debts. (ex: a loan or credit card balance).