

MAY 2026 RELEASE

A firm's guide to our updates

With this release, we've made meaningful updates across QuickBooks Online, QuickBooks Payments, QuickBooks Payroll, Intuit Accountant Suite, and Intuit Intelligence, designed to help your firm work faster, serve clients more effectively, and stay ahead in an evolving landscape. We've also introduced several new offerings, like the ProPartner Program and the Intuit Business Credit Card—built with you and your clients' needs in mind. Read about all of our latest updates in this guide.

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QuickBooks on the Intuit Platform

New updates include improvements to QuickBooks performance and functionality, Affirm as a new payment option, enhancements to Intuit AI, and more.

- Performance and experience enhancements
- Account locking
- Buy now, pay later with Affirm
- Done-for-you workflows with conversational AI
- Payroll Tax AI
- Coming soon: Unlock funding insights based on your data

Intuit Accountant Suite

This release includes new services that offer your clients more automation in QuickBooks and more ways to connect with human experts when they need them—while giving you and your firm transparency, visibility, and control over these services from Intuit Accountant Suite.

- “Ask an accountant” experience
- Create user groups in Intuit Accountant Suite

Additional updates

Get up to speed on some of our other important updates across the Intuit platform, including new product features and enhancements arriving soon.

- Intuit Business Credit Card
- More updates included with this release—and coming soon

Updates to QuickBooks performance and experience

Based on your feedback

You asked—we listened. With this release, we've made some meaningful updates to QuickBooks that reduce friction, improve accuracy, and give you more control over how you work.



Accounting & banking

- New categories and updates your clients make in QuickBooks are now available to use instantly—no refresh needed.
- Bank transactions from connected apps like PayPal can now be matched directly in their bank feed, just like any other transaction.



Invoicing & sales forms

- Your clients can now display their customer's phone number and email address directly on invoices, estimates, and other sales forms.
- Clients can customize forms to include the contact details that matter most to their business.



Bills & vendor payments

- Bill payment stubs now clearly list every open bill covered by a payment, giving your client's vendors the detail they need to apply payments accurately.
- The **Pay Bills** page now includes advanced filtering and sorting options—search by invoice date, vendor name, and more.



Inventory & purchase orders

- Your clients can now create a purchase order directly from a sales order in a single step, reducing the number of clicks per transaction.
- Simply click **Convert to purchase order** at the bottom right of the **Sales Order** page.



Reporting

- Your clients can now export reports that reflect what they see on screen.
- Simply click the icon next to any account or sub-account to expand or collapse it before exporting.



Performance

- QuickBooks Online common tasks like loading reports, navigating between screens, and working with large transaction volumes now happen more smoothly.

Account locking

What

You can now lock an account in your chart of accounts (COA), which prevents any QuickBooks user from selecting it.

Locking an account will block it from appearing in account dropdowns throughout QuickBooks. It also blocks bank rules that post to that account, and stops the bank feed from predicting into the account. However, it will not stop third-party apps from using the account.

Edit Account

Account name*
Meals

Account type* Expenses ⌵ Detail type* Travel Meals ⌵

Make this a subaccount

Description
Costs of meals which are neither with clients nor for travel (ie. for emplk

Lock account 🔒 🔓

Why

For your clients and firm:

Keep data accurate by locking accounts to prevent posting to accounts that shouldn't be used. Eliminate the need to reclassify the transactions to other accounts at the end of the month.

Accounts payable (A/P)	Accounts payable (A/P)	BAL	\$99,999,999,999.99
Credit card: Apple City	Credit card	BAL	\$27.53
Loan from bank	Long-term liability	BAL	\$99,999,999,999.99
Equity	Equity	BAL	\$99,999,999,999.99
Sales: Online sales	Income	P&L	
Sales: Storefront - Main Street			
Sales: Storefront - Second Street			
Advertising costs	Expense	P&L	
↳ Social media	Expense	P&L	
↳ Digital	Expense	P&L	
↳ Google	Expense	P&L	

This account is locked. You can't select this account from dropdowns on forms and transactions. Features and external apps that automatically post transactions to this account will continue to do so.

How

To lock an account, click **Edit** on any account in the **Chart of Accounts**, and choose the lock button.

When you import a chart of accounts or create a chart of accounts template, you can also mark accounts as locked in the template, so they're imported as locked in every company where you apply the template.

You can check the checkboxes next to accounts in the chart of accounts list to lock multiple accounts at once.

Finally, we added a new **Parent accounts only** filter to the **Chart of Accounts**. Accountants can enable that filter, then select all accounts, and use the batch action to lock every single parent account in one click.



Try it now

This is available now. Visit the Chart of Accounts to try out this feature.

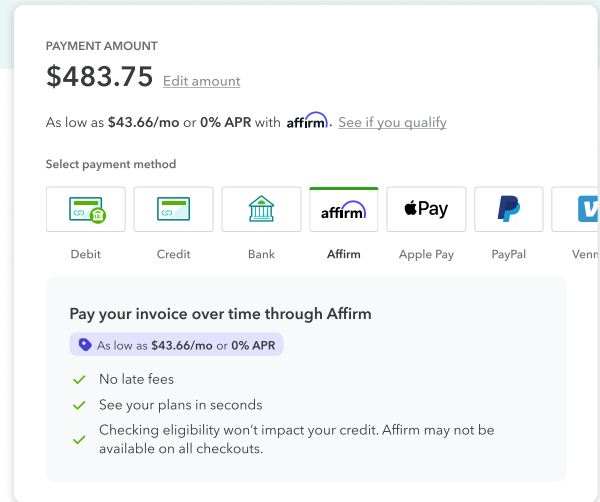
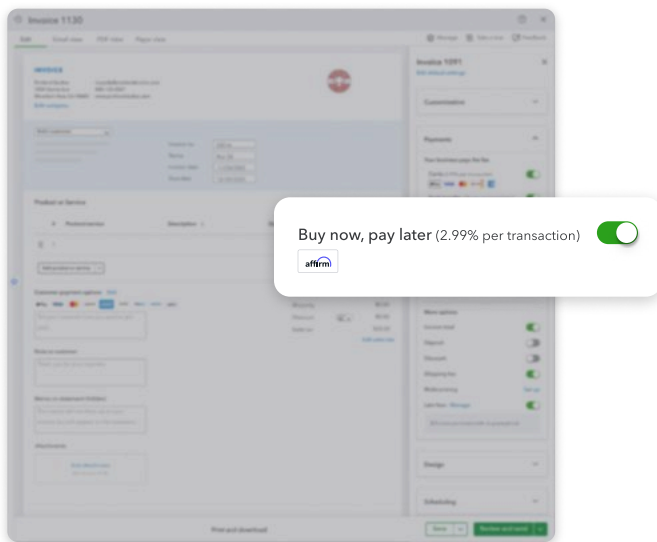
Visit Chart of Accounts

Buy now, pay later with Affirm

What

Your clients that use QuickBooks Payments can now offer their customers a buy now, pay later option on invoices with Affirm. When a customer chooses to pay with Affirm, your client's business receives the full amount of the invoice up front with transaction fees deducted, while the customer pays Affirm back in installments.

Read more about [Affirm](#).



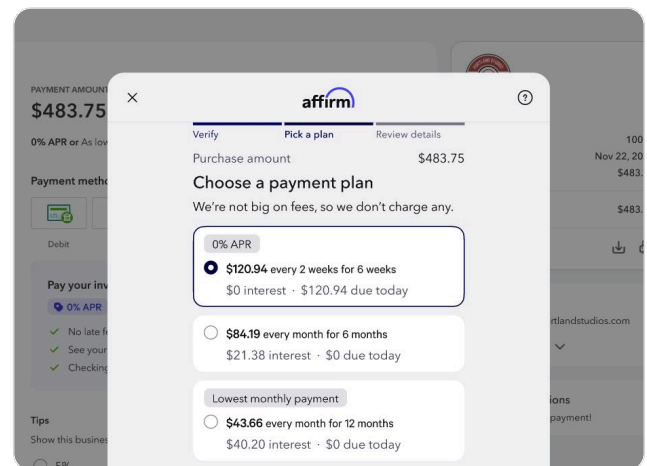
How

No set up required. Affirm will automatically appear as a payment option. When creating an invoice, your client can choose to turn on Affirm like any other payment option with QuickBooks Payments.

Why

For your clients: Get paid just as fast as other payment types (credit card, ACH) while helping customers afford larger purchases by offering a pay-over-time option, and supporting those who don't have the immediate cash on hand to pay the full invoice upfront.

For your firm: Affirm transactions reconcile just like other payments in QuickBooks Online. No added work.



Subject to eligibility and limitations. See lending terms at affirm.com/disclosures. Buy now, pay later features have limited availability and are subject to change. Features may be more broadly available soon. If you do not currently see Affirm buy now, pay later in your QuickBooks Online account, please email enable-affirm-qbo@intuit.com to request access.

See it today

Check out our buy now, pay later demo and see this feature in action.

Learn more about Affirm

Done-for-you workflows with conversational AI

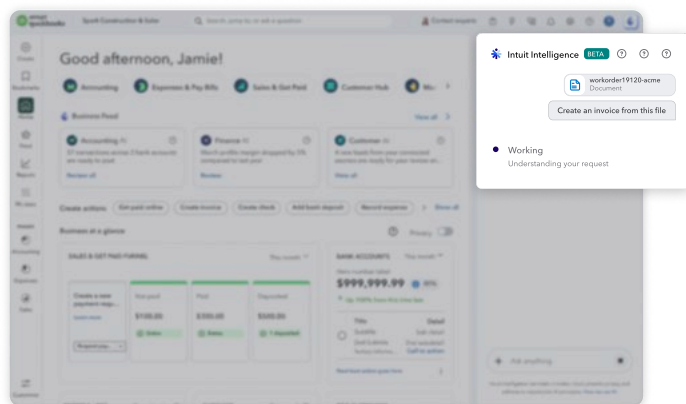
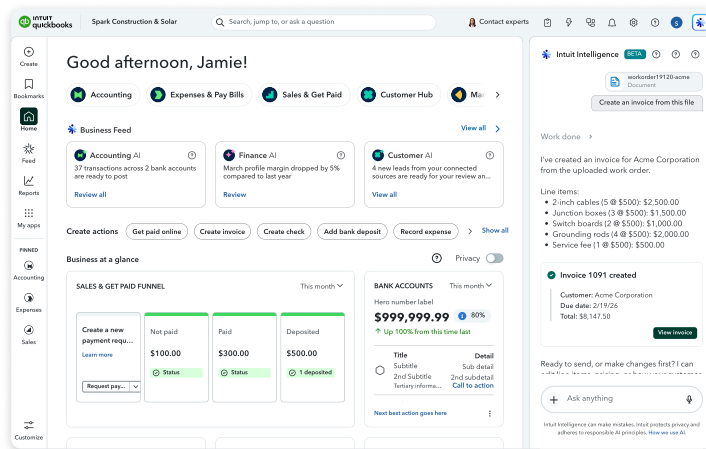
What

Conversational AI now delivers done-for-you workflows on web and mobile for customers using QuickBooks Online, Intuit Enterprise Suite, and Intuit Accountant Suite.

This includes:

- Generating invoices, expenses, and bill transactions
- Setup tasks, including connecting a bank, fixing a connection error, and adding an account to the chart of accounts
- Accounting anomaly detection
- Running payroll
- Creating exportable report PDFs, including CSV files based on customer commands

This update also features an enhanced accountant handoff, with more prominent placement, chat, and transcript summarization.



How

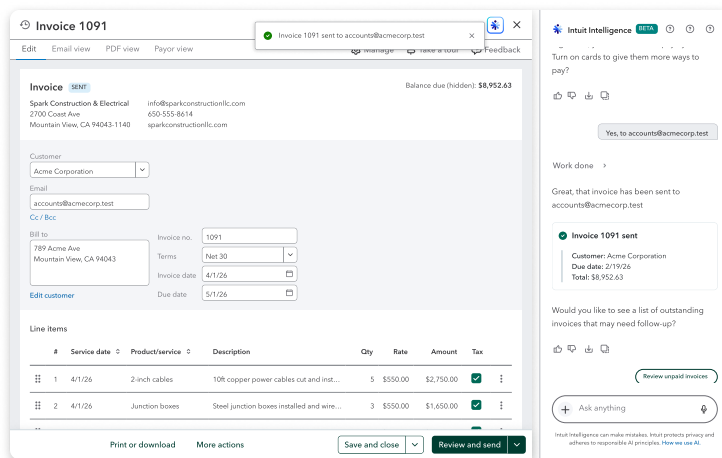
You can access this feature from the top navigation in QuickBooks Online, Intuit Enterprise Suite, and Intuit Accountant Suite via the **Intuit Intelligence** icon.

Additionally, you can use prompts to start these workflows in QuickBooks Online and Intuit Enterprise Suite, including "Connect bank," "Run payroll," and "Generate PDF of top expenses."

Why

For your clients and firm:

Improve client communications with their queries passed onto your firm. Plus, get actionable insights, clear recommendations, and your books done 2x faster.



See it today

This is available now.

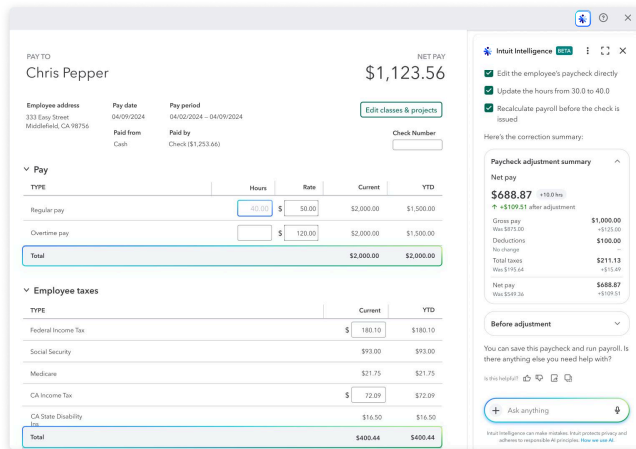
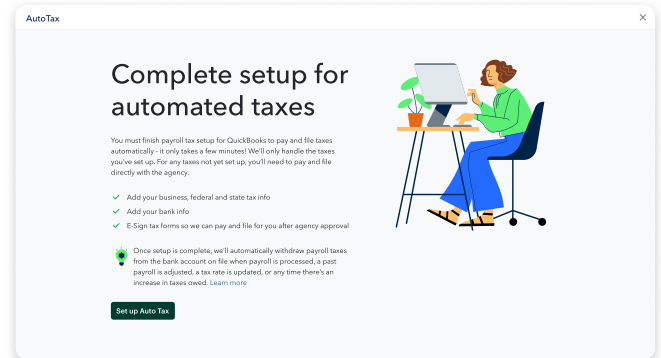
Payroll Tax AI

What

The new Payroll Tax AI provides expert-level, contextual, and personalized guidance and explanation through a conversational experience, explaining complex topics like tax setup, payment calculations, and rejected filings.

You or your client can also download payroll tax forms directly from the Payroll Tax AI chat.

Payroll Tax AI references current agency resources to surface any relevant compliance information and flag potential risks.



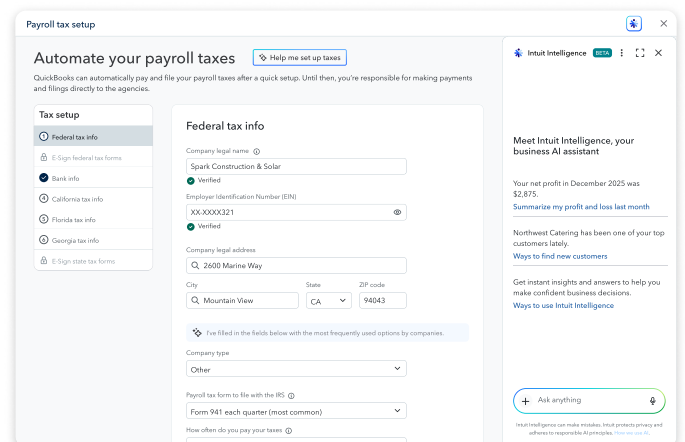
How

Payroll Tax AI can be activated from the top navigation in QuickBooks via the **Intuit Intelligence** icon. It will automatically prompt when it detects certain activities in QuickBooks—like payroll and tax setups.

Why

For your clients and firm:

Whether it's you or your client who runs payroll, Payroll Tax AI transforms a jargon-filled, complex process into a clear, guided "Done for you" experience.



Try it out

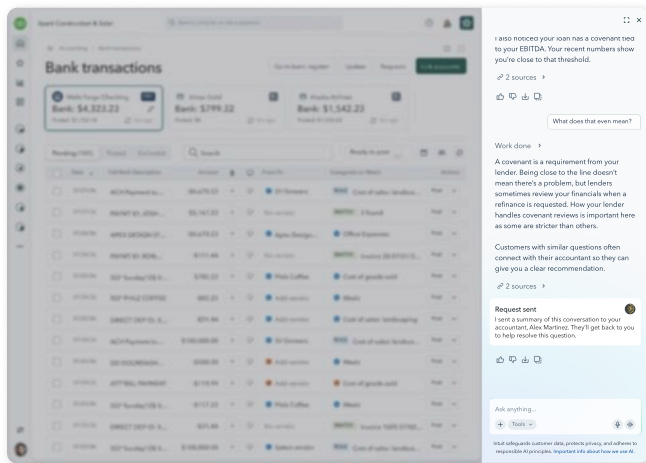
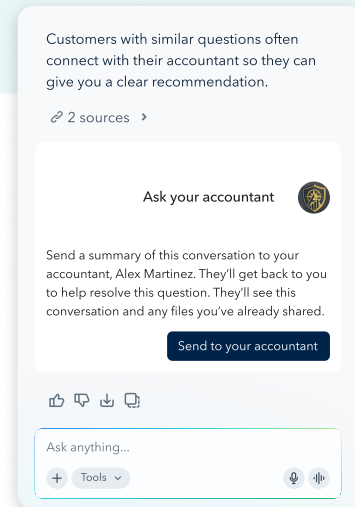
This is available now. Try it in QuickBooks by asking: "Help me set up my payroll taxes."

"Ask an accountant" experience BETA

What

In February, we launched Intuit Intelligence—the conversational AI interface you can use for personalized guidance in identifying potential strategies, analyzing a document, and more.

For your clients, QuickBooks will now suggest "Ask your accountant" in certain situations. We understand you know your clients' workflows best and, in these cases, can engage with them and respond more accurately.



How

In an "Ask your accountant" scenario, QuickBooks will offer your client a **Send to your accountant** button. This will send a transcript of the conversation to the accountant.

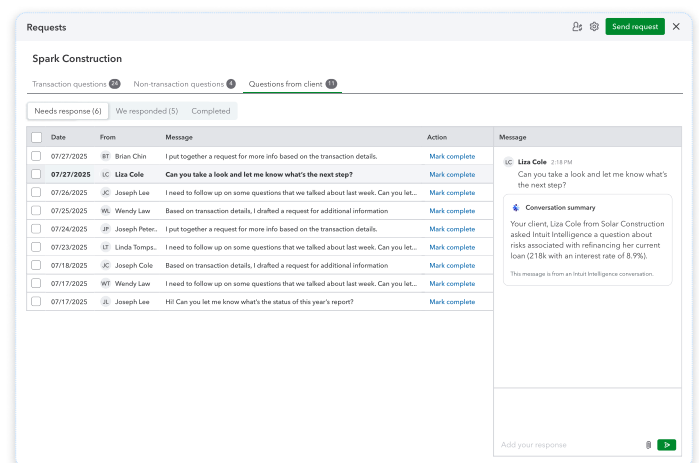
The accountant will receive an email notification that includes a link to the Intuit Accountant Suite Requests. Clicking on this link will access the **Questions from Client** tab where they can respond to the client's question.

When the accountant responds to the question, the client will receive an email notifying them of the accountant's response.

Why

For your clients: Get answers directly from the accountant, along with the context in QuickBooks that gives the accountant the full picture.

For your firm: Gain more control with your client relationships while boosting transparency. Add new ways to engage with the platform and collaborate with clients.



See it today

This is available now. Visit Requests in Intuit Accountant Suite.

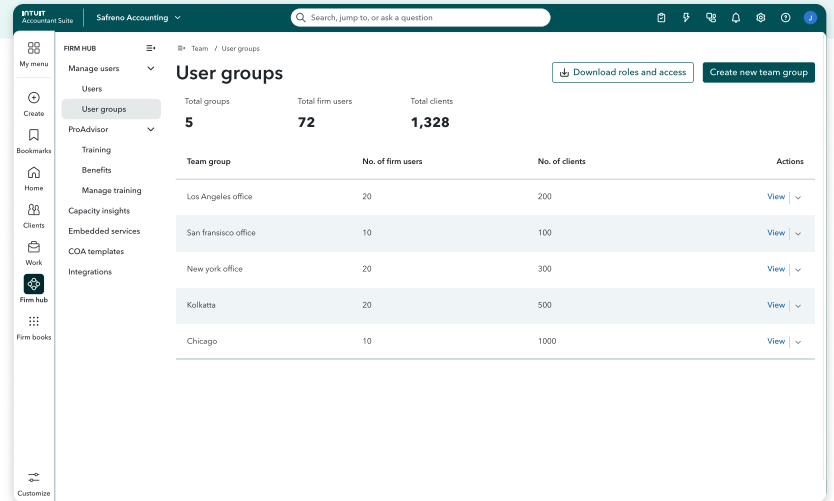
Visit Requests

Create user groups in Intuit Accountant Suite

What

You can now create user groups in Intuit Accountant Suite, allowing you to structure your team as they're structured in real life—by office, by service, team, etc.

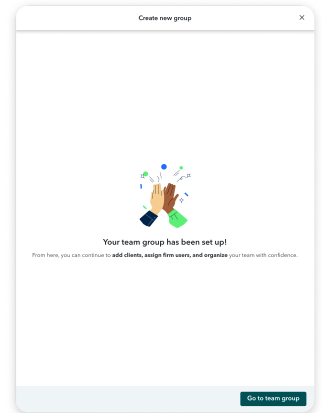
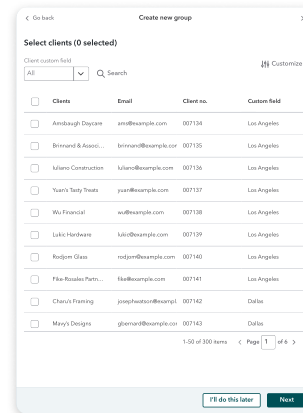
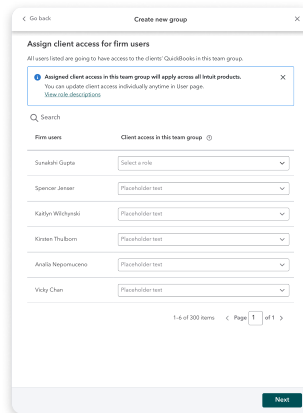
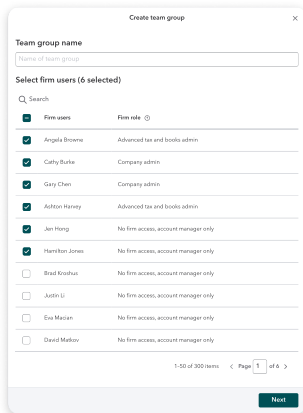
You can granularly track all changes made by any accountant sub-users. View logs for up to 10 clients at a time, with up to 5 recently accessed clients pre-selected.



How

Go to **Firm operations** in Intuit Accountant Suite and click **Create your first team group**.

Next, name your new group, add clients and teammates, and define access levels for each group member.



Why

For your firm:

- Improve organization and stay compliant by ensuring the team has an appropriate level of access to adopt services like AP/AR, bill pay, payments, and payroll at scale.
- Save time with automated onboarding and bulk assignments of customized role-based access and control for client and firm access.

Try it out

Create your first team group by visiting Firm operations in Intuit Accountant Suite now.

Visit Firm Operations

Intuit Business Credit Card

What

The all-new Intuit Business Credit Card integrates directly with the Intuit and QuickBooks ecosystems to underwrite based on live business health, not just personal credit history.

When a client opens the card, it automatically links to their QuickBooks Online account. Transactions sync directly to the bank feed. No setup. No credentials to maintain. No extra connections to manage.



INTUIT

- 1. Submit application
- 2. Get a decision & accept card
- 3. Add virtual card to Apple or Google Wallet

Review and submit your application

Submit application to find out if you're approved, with no impact to your personal credit score.

*Required fields

Company info

Prefilled from quickbooks [Edit](#)

Legal business name*

Modern Roots Construction Co.

How

Starting in May, clients can apply for the Intuit Business Credit Card in QuickBooks Online, while accountants can apply from Intuit Accountant Suite.

Note: Accountants can't apply for the Intuit Business Credit Card on behalf of clients right now, but this capability may become available in the future.

Why

For your clients and firm:

- Additional access to capital—qualify for \$1,000 to \$50,000 based on your business. See what you qualify for in minutes with no impact to your personal credit score.
- Best-in-class rewards with no annual fee, 2% cash back on everyday purchases, and 5% cash back when purchasing Intuit products and services. Plus, enjoy thousands of dollars in differentiated small business perks, like TurboTax Assisted Business Filing, Mailchimp, LegalZoom, and FedEx.*
- All income and expenses in one place, with built-in controls, employee card limits, and instant receipt matching.

INTUIT

Congratulations!

You're approved for \$50,000

5%	2%	
Cash back on Intuit Products and services	Cash back on all other completed purchases	
\$300	14.24%	\$0
Cash back bonus*	APR	Annual fee

*Spend \$3,000 in 3 months and get \$300 cash back.

Rewards

- 5% cash back on Intuit products & services
- 2% cash back on everyday business expenses


Benefits

- Automatic transactions with QuickBooks – income and expenses in one place
- Virtual card available right after activation
- Unlimited employee cards with customizable spending limits
- \$300 welcome bonus when you spend \$3,000 in the first 3 months of activation
- \$0 annual fee

Review terms and conditions

Intuit Business Credit Card Cardholder Agreement

Effective Date: (Insert Date)
Issuer: (Bank or Financial Name)
Card Program: (Your Business Card Name)
A. Agreement ID: (ID)



*Terms apply. Intuit Business Credit Cards are issued by WebBank. Mastercard and the circles design are registered trademarks of Mastercard International Incorporated.

Apply today

Your clients can apply for the Intuit Business Credit Card now at intuit.com/creditcard.

Additional updates

Intuit ProPartner Accountant:
A new and improved global partner program

Intuit Accountant Suite customers will soon get access to the new ProPartner Accountant program. This will replace the ProAdvisor program in January 2027 and include expanded benefits, future-focused education, and new community events. Learn about the changes and what actions you can take now to maximize your benefits by checking out our [ProPartner Quick Start Guide](#).

Expert review of AI-performed categorization

You can now take advantage of AI + your expertise and finalize transaction categorization started by AI.

Intuit Enterprise Suite product release

Check out all of the latest updates to Intuit Enterprise Suite in our [May product release](#).

A full Human Capital Management (HCM) solution

QuickBooks will now include a comprehensive HCM solution for QuickBooks Workforce Premium and Elite customers. Employee data is captured and maintained in a single system from recruiting through ongoing HR processes—reducing manual entry and inconsistencies before they impact payroll.

QuickBooks Online Bill Pay

QuickBooks Online Bill Pay now includes standard ACH payments at no additional per-transaction charge – across all subscription tiers.



Upcoming updates

June

QuickBooks Online

- Classic reports will no longer be available and will move to Modern Reports

July

Intuit Accountant Suite

- Portfolio AI across client insights
- ProConnect Tax service delivery module

Coming soon

QuickBooks Online

- Bookkeeping review & estimated taxes

Intuit Accountant Suite

- Multiple tabs support
- Payroll service delivery

Check out more new QuickBooks functionality for your clients

[Learn more](#)