

AUGUST 2026 RELEASE

A firm's guide to our updates

Your feedback continues to shape what we build, and we have worked to improve the everyday workflows you rely on most. Our latest release also prioritizes your expertise within your clients' QuickBooks experiences while helping your firm expand client service and standardize operations. New Intuit Intelligence capabilities help you automate costly, routine work and surface insights. Updates to Intuit Accountant Suite put even more power into your advisory practice.

TABLE OF CONTENTS

QuickBooks on the Intuit Platform

- Performance and experience enhancements
- AI-powered bank feed improvements
- Invoicing on autopilot (beta)
- Intuit Experts services permissions
- Conversational business intelligence with cause analysis
- Conversational business intelligence: financial planning
- Management reporting
- Bill Pay Elite
- Expert books upkeep
- Mobile app updates

Intuit Intelligence

- Speed, accuracy, and design enhancements
- Custom automations
- "Ask an accountant" experience (beta)
- Done-for-you workflows with conversational AI
- Payroll Tax AI

Intuit Accountant Suite

- Performance and usability enhancements
- Playbooks (beta)
- Resolution center
- Role-based access controls
- Multitab access
- Client communications inbox
- Books close automation (coming soon)
- Workflow control center
- Portfolio-level insights
- ProPartner Accountants overview (coming soon)

Additional updates

- Intuit Workforce Elite
- Intuit Enterprise Suite product release
- Industry solutions included with Advanced

QuickBooks enhancements based on your feedback

Investing in the workflows that matter most

The more QuickBooks does for your book of business, from categorizing transactions to drafting invoices to forecasting cash flow, the more you need complete trust in the reliability and accuracy underneath it all.

- **Reliability** to ensure your workflows and everyday tasks are ready when you are
- **Accuracy** to prevent rework so your team can move forward faster

Because core workflows have the greatest benefit in your work, that's where we've focused our investment in this release. Below are just a few of these enhancements.



Categorization

QuickBooks flags duplicate or conflicting rules for your review. Suggestions refresh faster after you categorize a similar transaction.



Intuit Intelligence

Intuit Intelligence chat is faster and smarter, shows how your data is being used, and proactively suggests next steps.*



Reporting enhancements

Among more than 50 report improvements, report labels spell out every figure, columns show all data, and pages print as they appear.



Faster load times

Data loads faster and more reliably across core workflows like invoicing, banking, reports, and payroll.



Keyboard shortcuts

Fly through banking, reports, and the tasks you do most with over 100 keyboard shortcuts.



KPIs and dashboards

Your clients using QuickBooks Essentials and Plus can now create a KPI scorecard and use prebuilt dashboards.

Intuit Intelligence chat is only available to admin users at this time. Each account gets limited capacity each month. This feature is in Beta. Beta features have limited availability and are subject to change.

Try it out

These updates are available now.

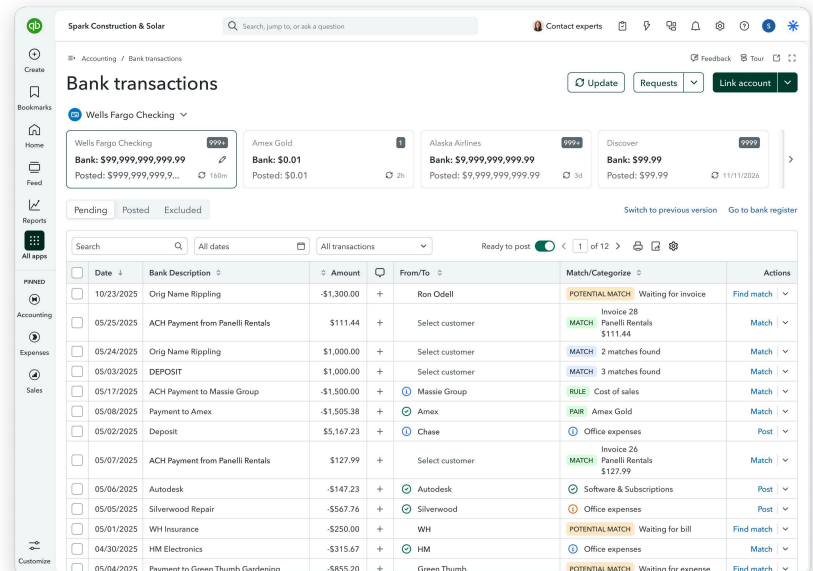
[Learn more](#)

AI-powered bank feed improvements

What

Several updates within AI-powered bank feeds are now available:

- Color-coded signals to indicate which automatic matches are more in need of review
- Pop-up warnings to help prevent duplicate entries resulting from incorrect matches or categorizations
- Improvements for mid-market scenarios, including multiple transfers and partial-payment matching
- Bank transactions from connected apps like PayPal can now be matched directly in their bank feed, just like any other transaction.



The screenshot displays the 'Bank transactions' page in QuickBooks Online. At the top, there are tabs for 'Wells Fargo Checking', 'Amex Gold', 'Alaska Airlines', and 'Discover'. Below these, a table lists transactions with columns for Date, Bank Description, Amount, From/To, Match/Categorize, and Actions. The 'Match/Categorize' column uses color-coded labels: 'POTENTIAL MATCH' (orange), 'MATCH' (green), 'RULE' (blue), and 'PAIR' (purple). The 'Actions' column includes links like 'Waiting for invoice', 'Find match', 'Match', 'Post', and 'Waiting for bill'.

Date	Bank Description	Amount	From/To	Match/Categorize	Actions
10/23/2025	Orig Name Rippling	-\$1,300.00	Ron Odell	POTENTIAL MATCH	Waiting for invoice, Find match
05/25/2025	ACH Payment from Panelli Rentals	\$111.44	Select customer	MATCH	Match
05/24/2025	Orig Name Rippling	\$1,000.00	Select customer	MATCH	2 matches found, Match
05/03/2025	DEPOSIT	\$1,000.00	Select customer	MATCH	3 matches found, Match
05/17/2025	ACH Payment to Massie Group	-\$1,500.00	Massie Group	RULE	Cost of sales, Match
05/08/2025	Payment to Amex	-\$1,505.38	Amex	PAIR	Amex Gold, Match
05/02/2025	Deposit	\$5,167.23	Chase	Office expenses	Post
05/07/2025	ACH Payment from Panelli Rentals	\$127.99	Select customer	MATCH	Invoice 26, Panelli Rentals \$127.99, Match
05/06/2025	Autodesk	-\$147.23	Autodesk	Software & Subscriptions	Post
05/05/2025	Silverwood Repair	-\$567.76	Silverwood	Office expenses	Post
05/01/2025	WH Insurance	-\$250.00	WH	POTENTIAL MATCH	Waiting for bill, Find match
04/30/2025	HM Electronics	-\$315.67	HM	Office expenses	Match
05/04/2025	Payment to Green Thumb Gardening	-\$855.20	Green Thumb	POTENTIAL MATCH	Waiting for exense, Find match

How

- QuickBooks Online customers using Essentials, Plus, and Advanced can now access an updated AI-powered bank feed with improved transaction categorization and matching.
- Within the feed are simplified icons to more clearly show a match's confidence level and likelihood to need review before posting.



Why

For your clients and firm:

- Help strengthen business decisions by basing them on more accurate data.
- Help speed month-end by reducing manual reconciliation and correction—and preventing double-counted entries at the source.
- Save time by spotting and reviewing matches that need your attention, and approving matches identified using consistent historical data.

Try it out

These updates are available now. [Sign in](#) to QuickBooks to see for yourself.

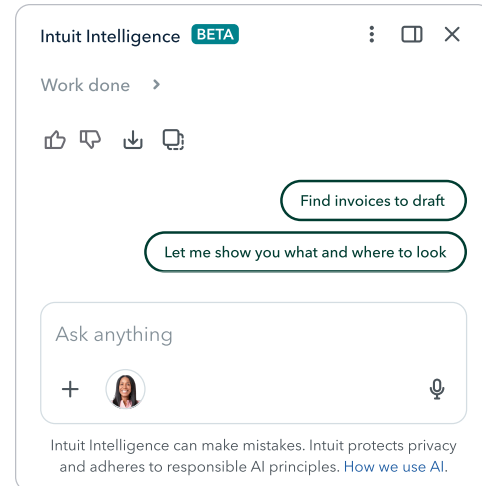
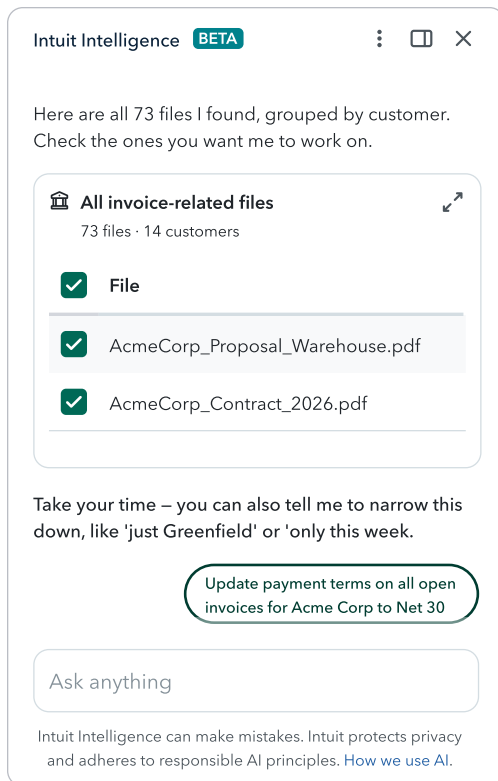
Learn more

Invoicing on autopilot

BETA

What

- Customers can create invoices using Intuit Intelligence chat within the invoicing workflow.
- They can add invoice data from supporting project documents, spreadsheets, or image files by uploading them within the thread.



How

- In **Invoices**, you or your client can upload a Google Drive document. Using this information, Intuit Intelligence will propose and create multiple invoices in bulk.
- Within the same thread, your client can make conversational edits, and these are reflected right away.
- After setting their overdue payment terms, your client will review and approve automatically drafted payment reminders to go out on their behalf.
- Your client will get a push notification when payment is received.

Why

For your clients and firm:

- Automate the most time-consuming parts of the invoice lifecycle. Create dozens of complete, consistent invoices at once, and edit invoices in bulk with one conversational command.
- Stop chasing payments and checking status with automatic reminders and push notifications.

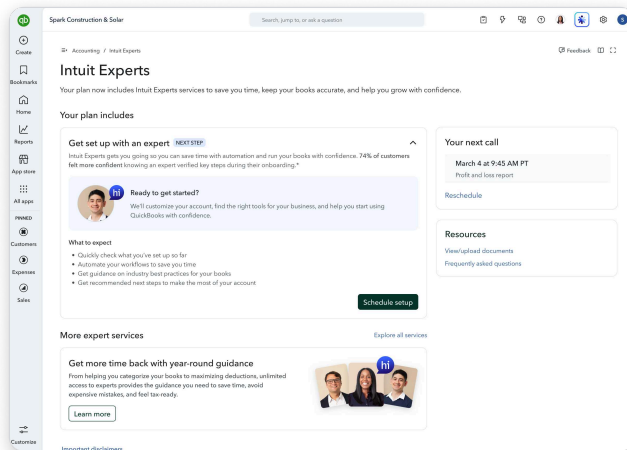


Invoicing on Autopilot will launch in Beta. Each account gets limited capacity each month. Beta features have limited availability and are subject to change. Bulk invoice creation requires a Google Drive account; clients without Google Drive will not be able to use this capability.

Intuit Experts services permissions

What

- Intuit Experts refers to Intuit employees offering a set of key services that are integrated directly into QuickBooks Online subscriptions. These services are Books check-in, Smart Expert categorization, and a combination of both called Expert Books upkeep.
- Your clients will no longer receive in-product marketing messages about adding Intuit Experts services.
- QuickBooks will prompt your **direct-billed clients** to ask you before adding these services. Your client can still decide to add them—and if they do, your firm will be informed in real time.
- QuickBooks will not allow your **firm-billed clients** to add these services. Only your firm can do so. Your client will see a prompt to discuss these services with you.



Intuit Experts services will not be marketed to your clients. Only your direct-billed clients will be able to add them in Intuit Experts.

How

- Intuit Experts services are off by default for accountant-attached businesses using QuickBooks. (See page 10 for more information.)
- Banners about Intuit Experts services will **not** appear in-product for accountant-attached businesses.
- To find information about added expert services, you or your client would visit **Expert hub/Intuit Experts** in their account. Accountant-attached businesses will be redirected to talk to their accountant about adding services.
- Your **direct-billed clients** will still have the option to add a service, and your firm will be notified of any additions. Your **firm-billed clients** will not be able to add these services themselves.

Why

For your firm:

- Exercise more control over adding services for clients.
- Stay in-the-know when a direct-billed client activates Intuit Expert services.

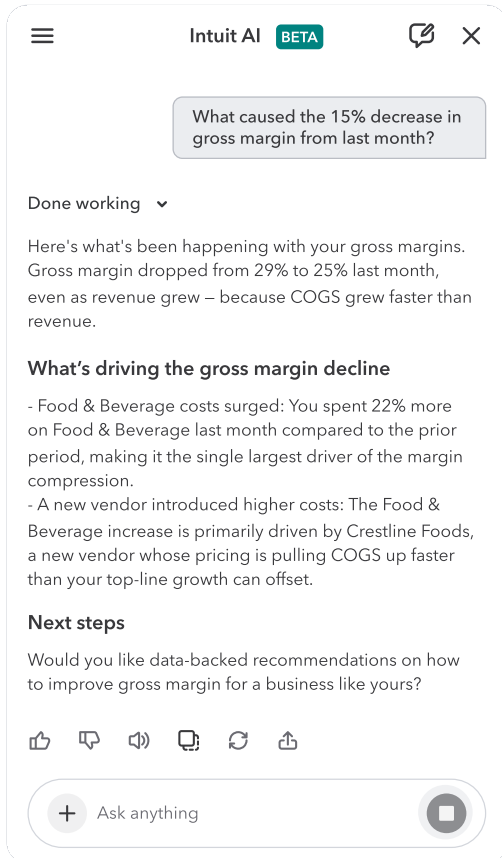


Get more details

These new settings for accountant-attached businesses are active across all QuickBooks products. Find out more on Firm of the Future.

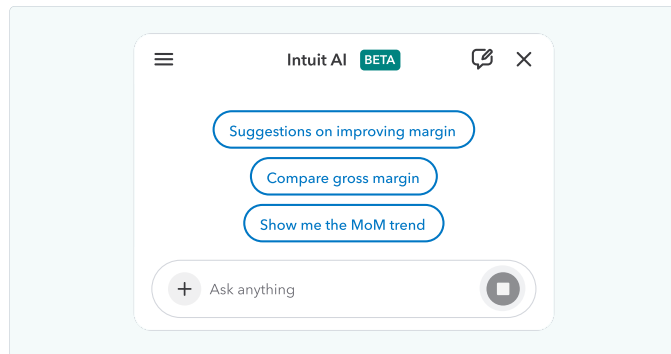
[Learn more](#)

Conversational business intelligence with cause analysis



What

- In addition to answering questions about what happened to change your financial data, Intuit Intelligence can now help your clients answer why.
- Within a chat, clients can learn the impact and context for the financial change and get suggestions for improvement and prevention.



How

- QuickBooks Online customers using Plus and Advanced can ask "why" questions related to a financial event or trend.
- Intuit Intelligence analyzes transaction data to identify a root cause, then provides the most likely contributing factors along with full context.
- Customers can ask follow-up questions to get more detail.

Why

For your clients:

- Learn about business performance without digging through manual reports, through simplified, easy-to-understand insights into the causes of financial trends.

For your firm:

- Lead more productive client advisory conversations when clients can access analysis and get informed.



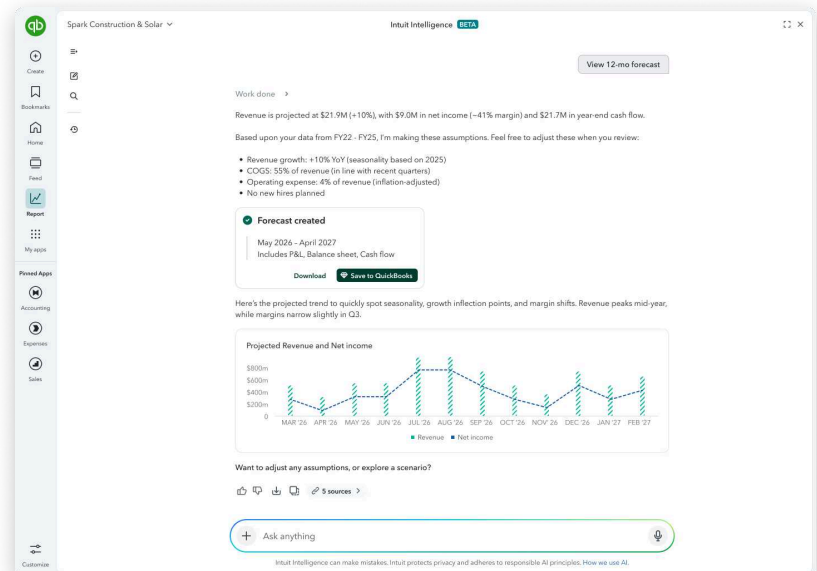
Try it out

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

Conversational business intelligence: financial planning

What

- Those using QuickBooks and Intuit Enterprise Suite can now edit financial forecasts through natural language and see changes as they go.
- Users can ask a “what-if” question to see a scenario’s impact on a forecast without disturbing the baseline.
- Forecasts can be converted into budgets to track against all year.



How

- From within a forecast, QuickBooks Essentials, Plus, and Advanced customers can use Intuit Intelligence chat to make changes using natural language—and preview changes right away.
- Intuit Enterprise Suite customers can access a split-screen workspace with an accompanying forecast view that updates with every change.
- The customer can accept a change to commit it to the forecast, or they can make further adjustments through chat.
- Customers can also explore the impacts of various scenarios and apply a scenario to recalculate their forecast.



Why

For your clients:

- Edit forecasts on the fly with no need for separate spreadsheets or data reentry.
- Explore scenarios freely without modifying any data.

For your firm:

- Expand advisory services for clients using Intuit Enterprise Suite through collaborative, live scenario planning and forecasting.

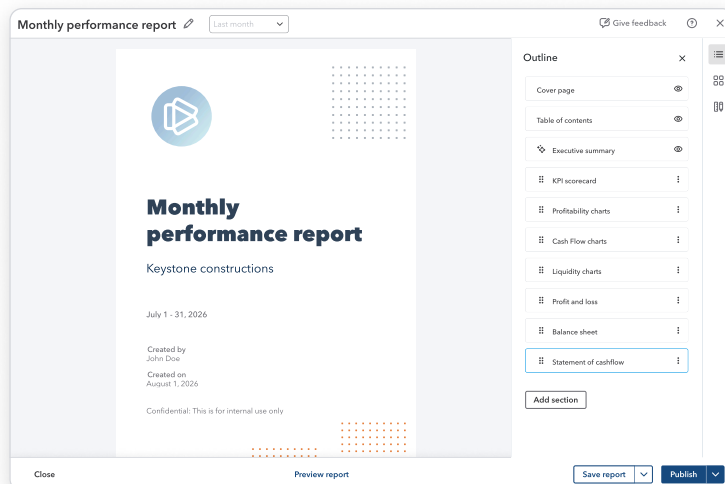
Try it out

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

Management reporting

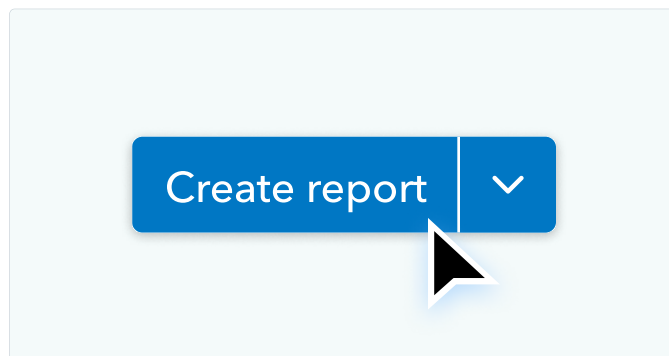
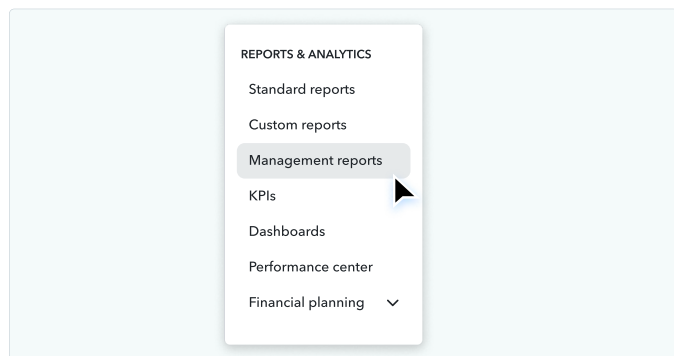
What

- QuickBooks customers can now tap into a full financial reporting suite built into the platform.
- Design report templates, include KPIs, write executive summaries, conduct variance analyses, and more.
- After reviewing management reports, schedule-send them directly to stakeholders.
- Make reports shareable to clients and executive boards while controlling who sees them through role-based access assignments.



How

- Go to **Reports**, select **Management reports**, and **Create report**. Include your choice of 100 pre-built KPIs, create custom KPIs, add AI summaries, and schedule delivery of your report.
- Share a report as permitted by your team's role-based access controls, or export it as a PDF or Excel for board meetings or client discussions.



Why

For your clients and firm:

- Stop paying extra costs for an outside reporting solution, and pass the savings onto your client or firm.
- Create board-ready management reporting with tools inside QuickBooks.
- Strengthen reporting process with added capabilities to review reports and schedule delivery to stakeholders.

Try it out

This update is available now. Go to Reports, select Management reports, and create your first report.

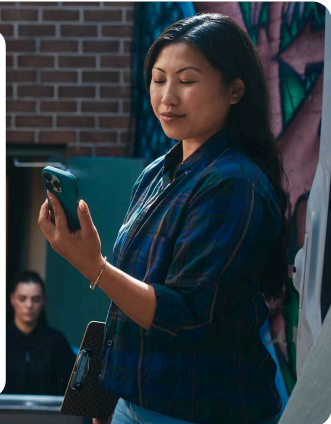
Or, see it in action.

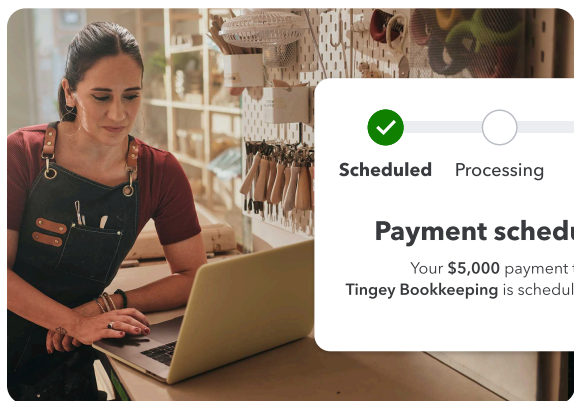
[Watch a demo](#)

Bill Pay Elite

What

Bill Pay Elite will be included in QuickBooks Advanced at no additional cost this August, so clients on Advanced will no longer need a standalone Bill Pay subscription.

- 
- ✓ **Pay from**
Checking (5555)
 - ✓ **Deliver to**
Bank account selected by vendor
 - ③ **Review & schedule**



✓ — ○ ○
Scheduled Processing Delivered

Payment scheduled

Your \$5,000 payment to
Tingey Bookkeeping is scheduled for 5/25

How

For accountant-billed Advanced subscriptions:

Your firm can choose to have your client pay their bill pay transaction fees while your firm pays for their QuickBooks Online Advanced plan.

For clients using standalone Bill Pay with QuickBooks Online Simple Start, Essentials, or Plus:

You can have your client pay for their own Bill Pay transaction fees, subscription fees, or both, while your firm continues to pay for their QuickBooks Online plan.

Why

For your clients:

- Clients using QuickBooks Advanced will no longer need a standalone Bill Pay subscription, saving them up to \$540 annually.



See it today

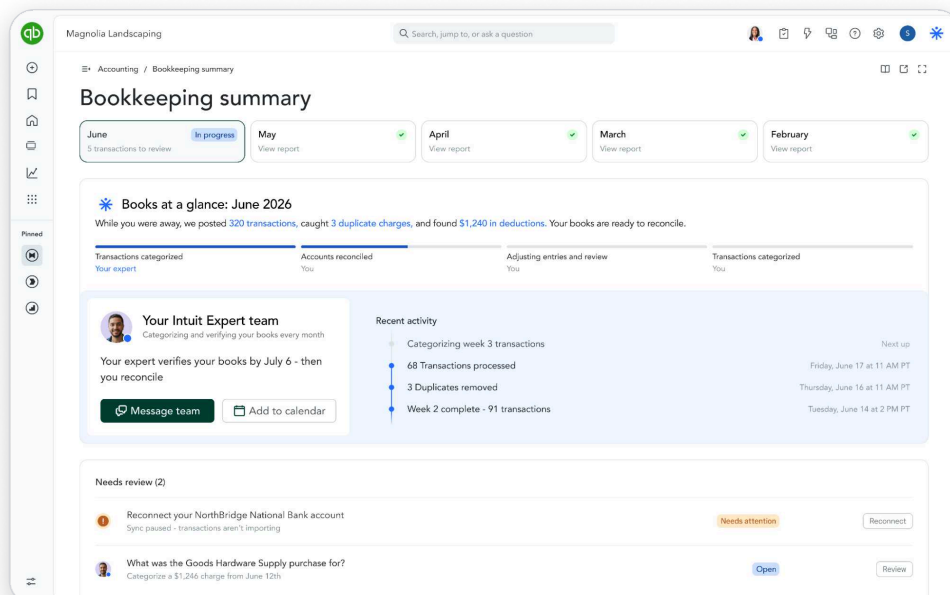
Get more info on the latest updates in Bill Pay.

Learn more

Expert books upkeep

What

For your clients using QuickBooks Online Advanced, expert books upkeep can work to keep their records categorized, matched, and accurate by utilizing AI and an expert-verified automated transaction and posting service.



How

- With this feature, an Intuit Expert handles your client's ongoing categorization and matching between your client meetings.
- Intuit Experts check the books regularly for quality and are available each quarter to walk your client through AI-surfaced anomalies.
- In QuickBooks Advanced, your clients who are direct-billed will be encouraged to check with you before activating continuously clean books. Your firm-billed clients will not be able to activate this service for themselves.



Why

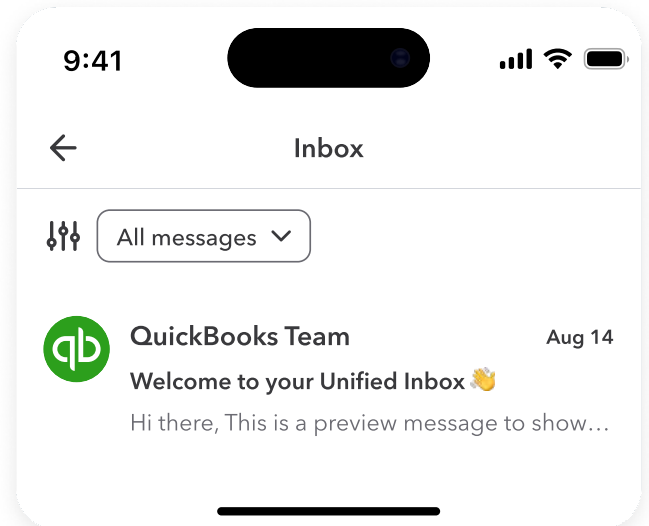
For your firm:

- Cleaner books help clients focus on insights, advisory, and decisions that matter most to their business
- Get ongoing financial clarity about a client's growth opportunities rather than scramble to get their books in order each month.

Mobile app updates

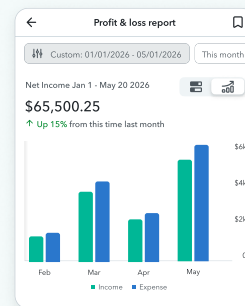
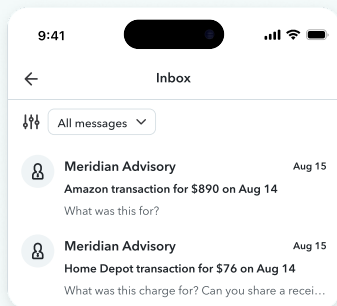
What

- Customers can access an improved experience in the QuickBooks mobile app.
- Proactive, personalized notifications help ensure they see important alerts, and an improved homepage provides fast access to common tasks.
- Accountant collaboration and full report creation is now built into the mobile app.
- Customers can use the mobile app to approve AI-categorizations and create key financial reports.



How

- Clients can visit the **Collab inbox** in the app to see messages from you, document requests, action items, and other notifications.
- They can go to **Reports** to create P&L, Balance Sheet, and Cash Flow reports—or custom reports—and drill down to the transaction level.



Why

For your clients:

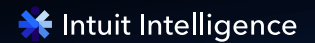
- Clients can get more of their financial tasks done on the go.

For your firm:

- Helps speed client response times and document collection rates because it allows clients to be more productive.



Intuit Intelligence enhancements based on your feedback



Partnership in a time of reinvention

Amidst fast-paced industry innovation and a shrinking talent pool, firms need trustworthy tools that help deliver efficiency and confidence in their client service.

- **Efficiency** to complete high-quality work and turn answers into actions
- **Confidence** in decision-making built from data-backed insights

Because firms and their clients need insights they can depend on, we've focused the latest Intuit Intelligence updates on answers, questions, and context. Below are just a few of these enhancements.



Added speed and accuracy

Reduce the wait when running reports or meeting with clients. Initial answers are now more accurate, and response times are faster.



More precise clarification

Arrive at a high-quality answer faster with specific, detailed follow-up questions that help you shape your prompts.



Source attribution every time

Help ensure an AI-generated Intuit Intelligence answer meets your client service standards by referencing detailed info on its source data.



Consistent experience

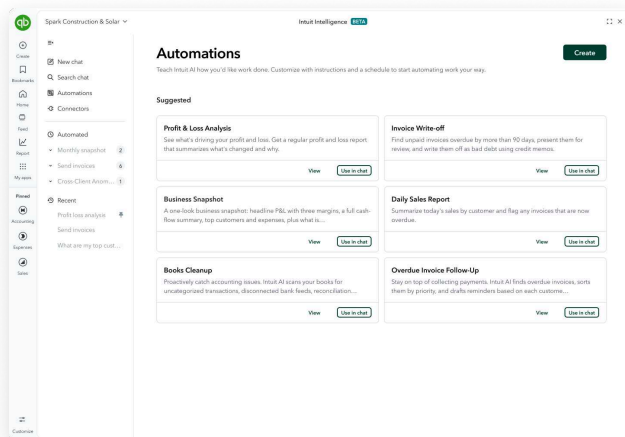
Get a polished, singular experience when using Intuit Intelligence across the platform, rather than varying designs.

Try it out

These updates are available now.

What

- Customers can build, configure, schedule, and run their own automations that use Intuit Intelligence.
- They can set these automations to generate reports, send reminders, or summarize data automatically—and notify them when run.
- Based on a customer's usage patterns, additional automations are suggested proactively.



Why

For your firm:

- Capture more time for advisory conversations when clients' recurring manual tasks are simplified.
- Get complete visibility into your client's automations and what the automations have generated.
- Review cleaner, more consistent data with automated reports generated through recurring custom automations.

✓ Automation created: {{Name of Automation}}

Workflow:

1. Pull last 12 months P&L report
2. Pull balance sheet and cashflow
3. Summarize A/R, A/P, and key risks

Schedule: Every Monday at 9:00 AM PT

Notifications: email

[View automation](#)

How

- Your clients can create a custom automation by describing it in a chat, choosing a suggested template, or through the automations hub dashboard.
- They can set automations to run on a schedule and receive notifications for each run.
- With Intuit Intelligence chat, you and your client can manage automations—pause, edit, delete or check status.
- All automation runs will be recorded in an audit log you can access—entries include who created an automation, edited it, automation edits made, and output summary of each automation run, plus automation pauses, resumes, and deletions.

📅 Schedule Weekly Business Snapshot

Workflow:

1. Pull last 12 months P&L report
2. Pull balance sheet and cashflow
3. Summarize A/R, A/P, and key risks

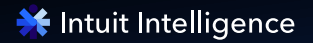
Schedule: Every Monday at 9:00 AM PT

[Schedule automation](#)

See it today

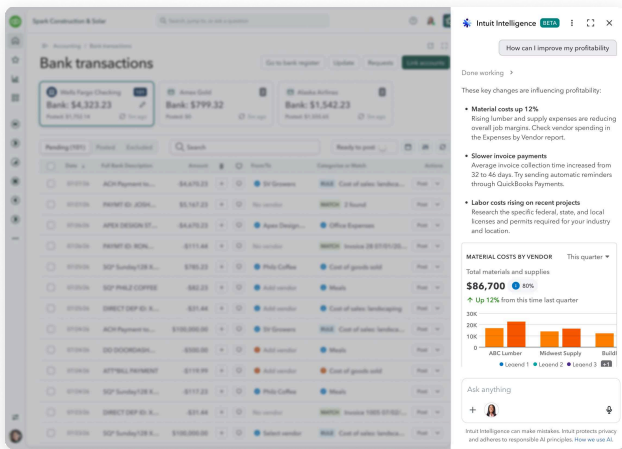
Visit your client's **Automation hub** and select **Audit log** to see their automation activities.

BETA



What

- When Intuit Intelligence suggests to your client, “Ask your accountant,” the resulting conversation will now stay in one thread.
- This full thread will include AI assistance your client receives, help they may get from a support agent, and your firm’s input.
- If a client’s conversation is rerouted to you, you’ll be able to see a summary and transcript of the full thread to date.



Message Beasley & Howe



Hi,

I'm working through a reconciliation issue in QuickBooks and noticed that my bank balance and QuickBooks balance are off by a few thousand dollars. I suspect there may be duplicate or unmatched transactions, and possibly some discrepancies from prior reconciliations. Could you help review my accounts and identify what's causing the mismatch? I want to make sure everything is accurate before closing the books this period.

- Alex, Spark Construction & Solar



 [Edit message](#)

Send message

How

- In your **Inbox**, you'll receive threads from your client if they ask you a question directly.
- They will also be prompted to ask you if their chat or the skill they're using is complex.
- Your client could see these prompts in the chat window, in callbacks, and in video meetings.
- If Intuit Intelligence can't answer a client's question, it will also be routed to you.
- When you respond to a thread, your client will receive notifications in-product, by email, and through SMS about your new response.

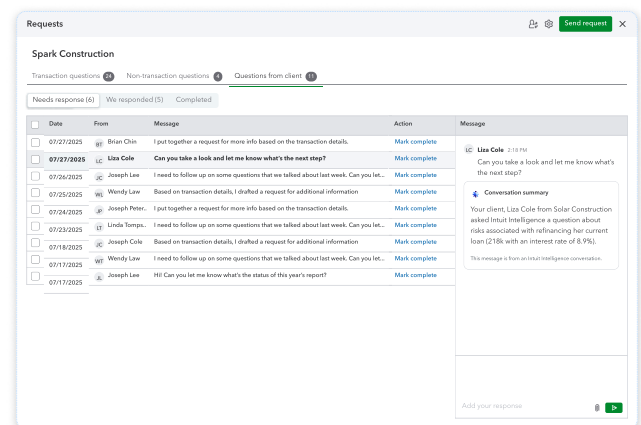
Why

For your clients:

- Save time by only explaining your question once, and get answers directly from the accountant with full context.

For your firm:

- Help identify more high-value advisory moments.
- Strengthen client collaboration with additional contextual opportunities to connect in-platform.
- Add transparency with access to full threads to date.



See it today

This update is available now. Your client can visit their **Inbox** in QuickBooks Online.

Visit Inbox

Done-for-you workflows with conversational AI

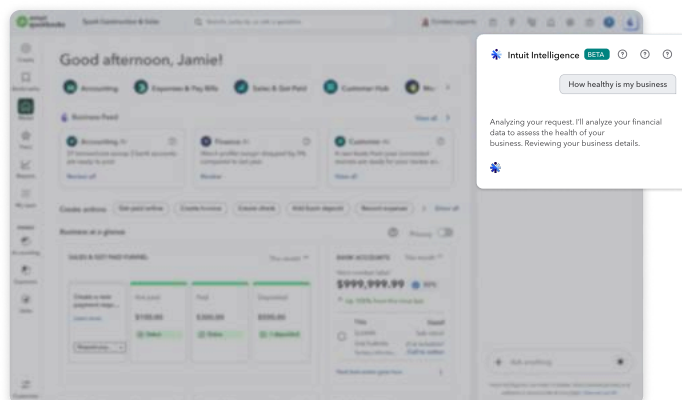
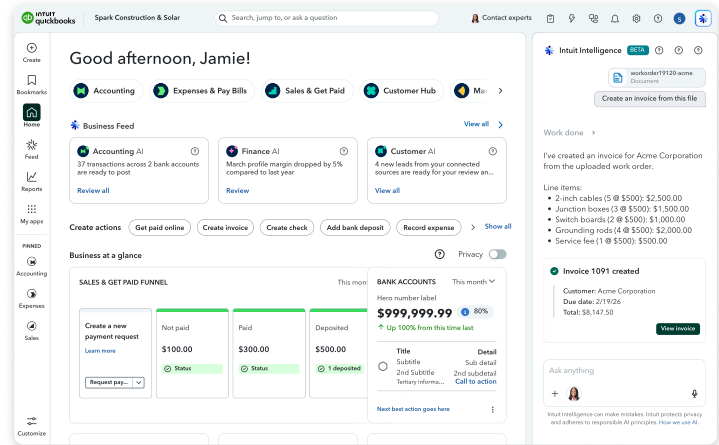
What

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.



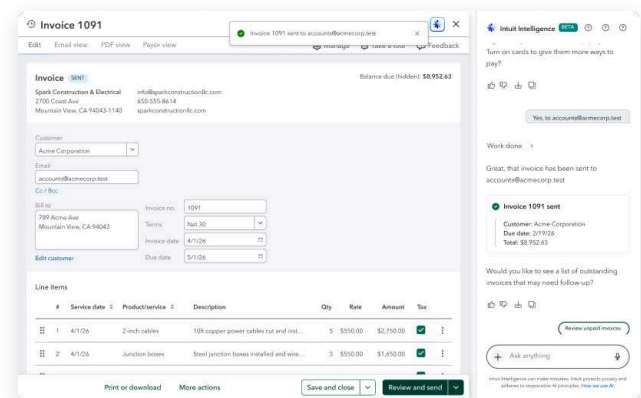
How

- 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.
- Get actionable insights, clear recommendations, and your books done 2 times faster.

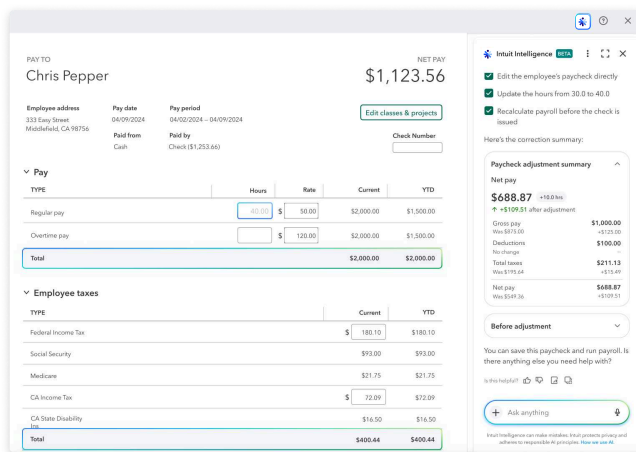


Try it out

This update is available now.

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.



PAY TO
Chris Pepper

NET PAY
\$1,123.56

Employee address
333 Easy Street
Mountain View, CA 94033

Pay date
04/09/2024

Pay period
04/02/2024 - 04/09/2024

Paid from
Cash

Paid by
Check #1,234,567

Check Number
[Input field]

Pay

TYPE	Hours	Rate	Current	YTD
Regular pay	40.00	\$ 50.00	\$2,000.00	\$1,500.00
Overtime pay		\$ 120.00	\$2,000.00	\$1,500.00
Total			\$2,000.00	\$2,000.00

Employee taxes

TYPE	Current	YTD
Federal Income Tax	\$ 180.10	\$180.10
Social Security	\$93.00	\$93.00
Medicare	\$21.75	\$21.75
CA Income Tax	\$ 72.89	\$72.89
CA State Disability Ins.	\$16.50	\$16.50
Total	\$400.44	\$400.44

Paycheck adjustment summary

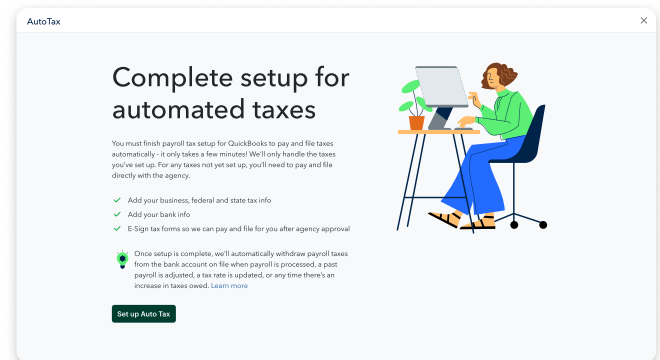
Net pay
\$688.87
+ \$180.10 after adjustment
= \$868.97

Gross pay
Ww \$175.00
Deductions
No charge
Total taxes
Ww \$193.54
Net pay
Ww \$549.36

Before adjustment
Net pay
Ww \$549.36

You can save this paycheck and run payroll. Is there anything else you need help with?

Ask anything



AutoTax

Complete setup for automated taxes

You must finish payroll tax setup for QuickBooks to pay and file taxes automatically - it only takes a few minutes! We'll only handle the taxes you've set up. For any taxes not yet set up, you'll need to pay and file directly with the agency.

- ✓ Add your business, federal and state tax info
- ✓ Add your bank info
- ✓ E-Sign tax forms so we can pay and file for you after agency approval

Once setup is complete, we'll automatically withdraw payroll taxes from the bank account on file when payroll is processed, a past payroll is adjusted, a tax rate is updated, or any time there's an increase in taxes owed. [Learn more](#)

Set up Auto Tax

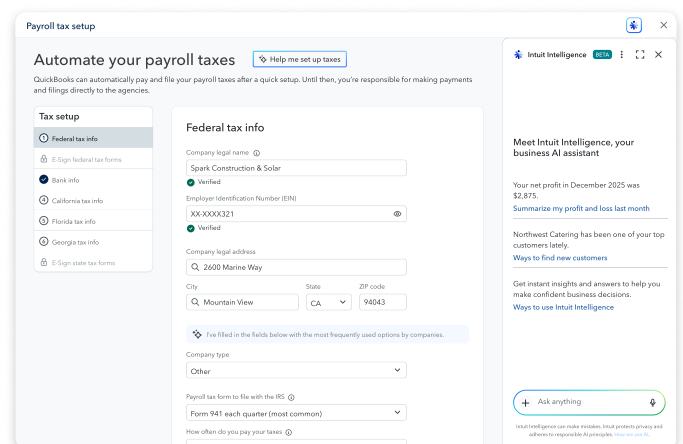
How

- 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.



Payroll tax setup

Automate your payroll taxes

QuickBooks can automatically pay and file your payroll taxes after a quick setup. Until then, you're responsible for making payments and filings directly to the agencies.

Tax setup

- Federal tax info
- E-Sign federal tax forms
- Bank info
- California tax info
- Florida tax info
- Georgia tax info
- E-Sign state tax forms

Federal tax info

Company legal name:

EIN:

Company legal address:

City: State: ZIP code:

Company type:

Payroll tax form to file with the IRS:

How often do you pay your taxes:

Meet Intuit Intelligence, your business AI assistant

Your net profit in December 2023 was \$2,875. [Summarize my profit and loss last month](#)

Northwest Catering has been one of your top customers lately. [Ways to find new customers](#)

Get instant insights and answers to help you make confident business decisions. [Ways to use Intuit Intelligence](#)

Ask anything

Try it out

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

Intuit Accountant Suite enhancements based on your feedback

INTUIT
Accountant Suite

Amplifying your expertise

Clients now demand more than ever, so firms need a reliable, easy-to-use platform that helps provide service at scale and actionable insights.

- **Service** that's standardized, saves time, and gets more done
- **Insights** for deeper client advisory without the manual effort

Because your work depends on optimizing firm operations and providing insightful advisory, that's where we've focused our investment in this release. Below are just a few of these enhancements.



Platform performance

Intuit Accountant Suite is now faster and more reliable, with platform enhancements and bug fixes designed to reduce friction. Plus, keep client work active and organized in multiple tabs.**



Portfolio-level insights **BETA**

Compare financial data across your entire client portfolio. Ask sophisticated questions in Intuit Intelligence chat and get real-time insights to help uncover meaningful information without extensive effort.*



Resolution center **BETA**

Track, prioritize, and resolve open client issues from one place, so you can stop coordinating messages across email, Slack, or other separate tools.



Firm playbooks **BETA**

Simplify scaling firm expertise by creating playbooks of settings, chart of accounts, policies, user groups, and more to apply across clients—and push template updates to all linked clients.



Client communications inbox **BETA**

Connect with clients from one centralized inbox that aggregates all client requests. Notify clients by SMS (once permitted) of actions to take.

* Intuit Intelligence chat has a cap of 200 questions in Core and 1000 questions in Accelerate during the beta period.

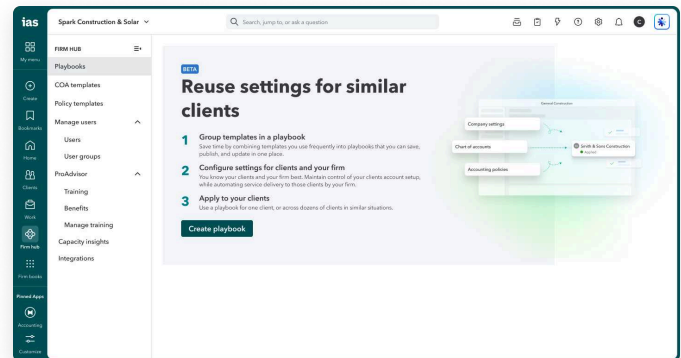
Try it out

[Sign in](#) to Intuit Accountant Suite to see these updates for yourself.

BETA

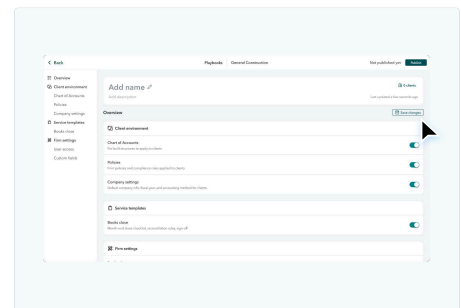
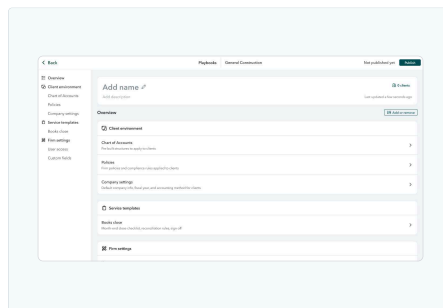
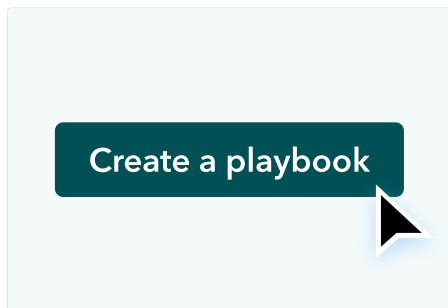
What

- Your firm can now set up a playbook for a type or a vertical of client, including company settings, chart of accounts, accounting policies, books close settings, custom fields, and user access groups.
- Once created, you can instantly apply your playbook to a new or existing client to automate the onboarding process.
- If firm standards change and you revise a playbook, you can choose to push the changes to all associated clients.



How

- Firm leads can go to **Playbooks** in Intuit Accountant Suite to create a template.
- You'll make choices across 3 categories: client setup, service delivery, and firm settings.
- In a guided flow, you can save your playbook and apply it to any new or existing client with a QuickBooks subscription.



Why

For your firm:

- Onboard multiple clients in a single flow rather than hours of effort.
- Keep consistent standards across your entire book of business to reduce compliance risk and eliminate one-off client configurations.
- Save time by automatically managing access to client files by applying a playbook

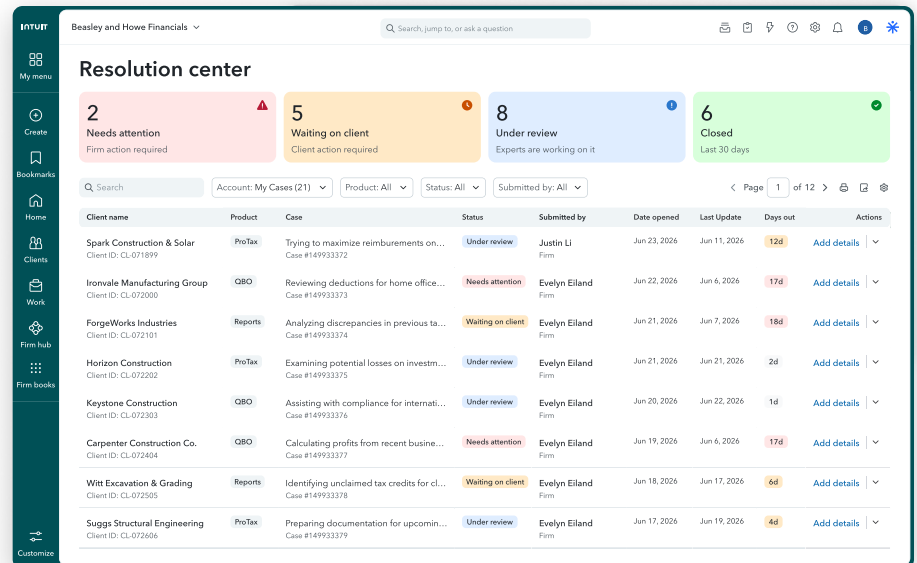


Try it out

[Sign in](#) to try playbooks.

What

Your team can now visit one central hub in Intuit Accountant Suite to track product support tickets from team members and clients.



The screenshot shows the Intuit Resolution Center interface. At the top, there's a header with the Intuit logo, the firm name 'Beasley and Howe Financials', and a search bar. Below the header, there's a 'Resolution center' title. A dashboard section displays four status cards: 'Needs attention' (2 cases), 'Waiting on client' (5 cases), 'Under review' (8 cases), and 'Closed' (6 cases). Below these cards is a table of open cases with columns for Client name, Product, Case, Status, Submitted by, Date opened, Last Update, Days out, and Actions. The table lists several cases with their respective details and status indicators.

Client name	Product	Case	Status	Submitted by	Date opened	Last Update	Days out	Actions
Spark Construction & Solar Client ID: CL-071899	ProTax	Trying to maximize reimbursements on... Case #149933372	Under review	Justin Li Firm	Jun 23, 2026	Jun 11, 2026	12d	Add details
Ironvale Manufacturing Group Client ID: CL-072000	QBO	Reviewing deductions for home office... Case #149933373	Needs attention	Evelyn Elland Firm	Jun 22, 2026	Jun 6, 2026	17d	Add details
ForgeWorks Industries Client ID: CL-072101	Reports	Analyzing discrepancies in previous ta... Case #149933374	Waiting on client	Evelyn Elland Firm	Jun 21, 2026	Jun 7, 2026	18d	Add details
Horizon Construction Client ID: CL-072202	ProTax	Examining potential losses on investm... Case #149933375	Under review	Evelyn Elland Firm	Jun 21, 2026	Jun 21, 2026	2d	Add details
Keystone Construction Client ID: CL-072303	QBO	Assisting with compliance for internati... Case #149933376	Under review	Evelyn Elland Firm	Jun 20, 2026	Jun 22, 2026	1d	Add details
Carpenter Construction Co. Client ID: CL-072404	QBO	Calculating profits from recent busine... Case #149933377	Needs attention	Evelyn Elland Firm	Jun 19, 2026	Jun 6, 2026	17d	Add details
Witt Excavation & Grading Client ID: CL-072505	Reports	Identifying unclaimed tax credits for cl... Case #149933378	Waiting on client	Evelyn Elland Firm	Jun 18, 2026	Jun 17, 2026	6d	Add details
Suggs Structural Engineering Client ID: CL-072606	ProTax	Preparing documentation for upcomin... Case #149933379	Under review	Evelyn Elland Firm	Jun 17, 2026	Jun 19, 2026	4d	Add details

How

- Visit **Resolution center** to view, track, prioritize, and resolve open product support tickets from your clients and team.
- Check the status of open cases, see which ones need urgent attention, and add more detail to tickets.



Why

For your firm:

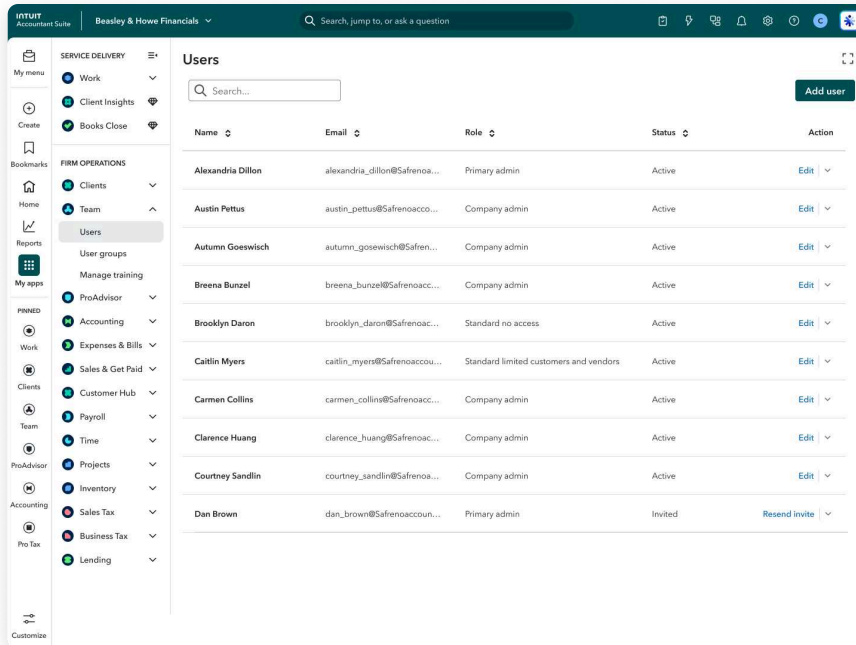
- Simplify management of client issues without having to go into each client's file or coordinate across email, Slack, or other disparate tools.
- At scale, resolve clients' open cases efficiently and help your team track case status.

See it today

This update is available now. [Sign in](#) and visit **Resolution center** to track your firm's open cases.

Role-based access controls

INTUIT
Accountant Suite



What

- Assign role-based permissions to your firm's users to monitor and control which team members are able to access which clients' data.
- By default, firm partners can see all clients, and staff accountants see only their assigned clients.

How

- Visit **Settings** ⚙️ to configure your firm's permission structure for team members across any number of client files.
- You can configure permissions for roles or user groups to automatically grant the right levels of access to new hires or client teams.
- User groups defined through a firm template will automatically inherit its preset access permissions.

Why

For firm partners:

- Reduce compliance and confidentiality risk at the firm level by ensuring that junior staff see only the clients and data they need.

For operations leads:

- Save time by granting role-based access automatically to user groups in one apply flow.
- Manage access safely across multi-staff, multi-client environments.



Try it out

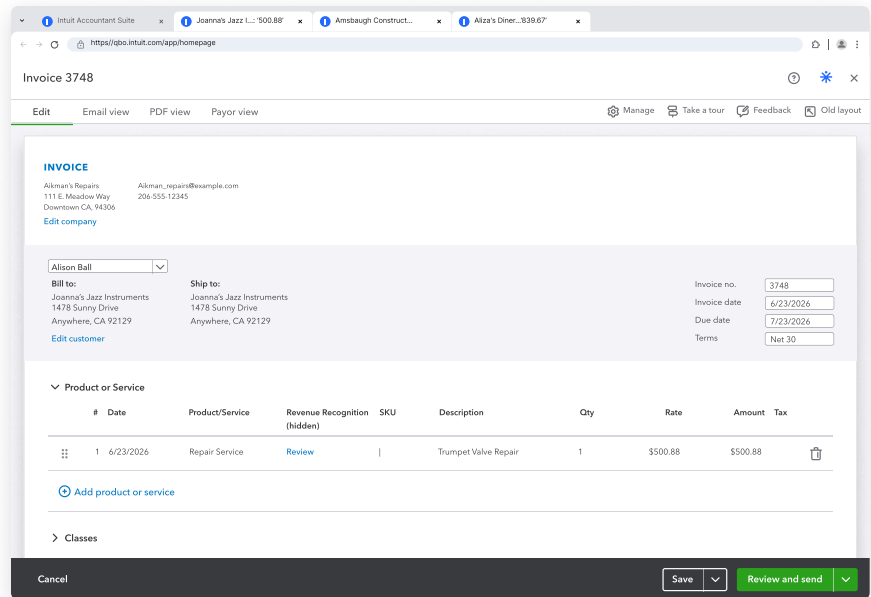
This update is available now. [Sign in](#) and visit **Settings** ⚙️ to revise role-based access for your firm.

Multitab access

INTUIT
Accountant Suite

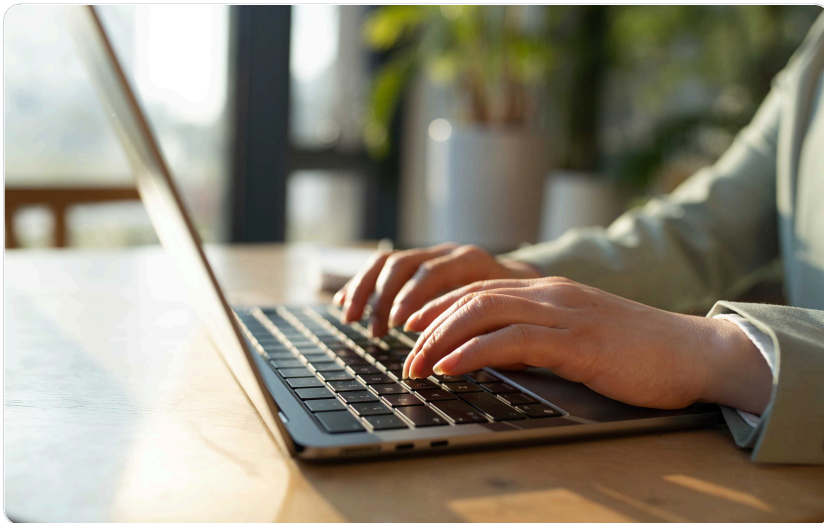
What

Access your client list and multiple client files simultaneously through a tabbed workspace in Intuit Accountant Suite.



How

- You'll be able to keep your client list open in one tab along with up to 4 of your clients' files in additional tabs.
- Accountants with Intuit Enterprise Suite can switch between different entities in a multi-entity client without confusion.
- To open a client's file in a new tab, click their name from your client list.



Why

For your firm:

Boost efficiency with a new way of working that eliminates the need to close a screen in order to work in another.

Try it out

This update is available now. Select a client from your list to open a new tab.

Or, see it in action.

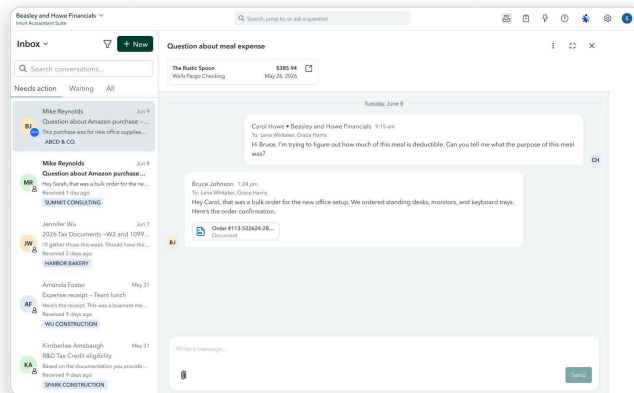
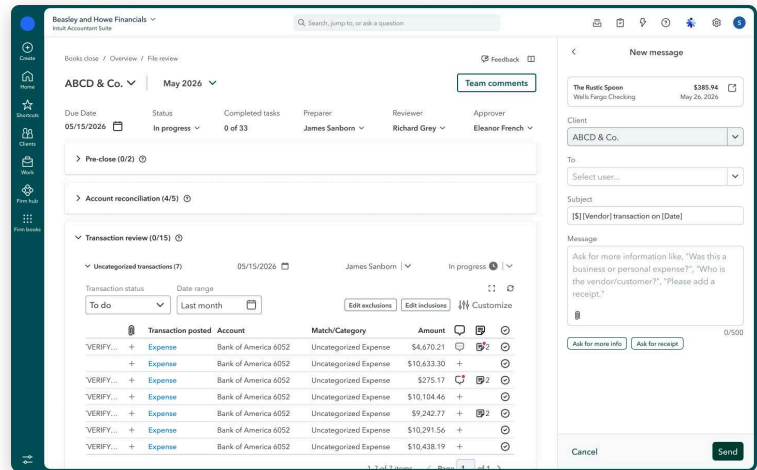
[Watch a demo](#)

Client communications inbox

INTUIT
Accountant Suite

What

- Receive requests from clients across your portfolio in one Intuit Accountant Suite inbox.
- Each client's assigned team has access to every client message.



How

- Visit your **Inbox** in Intuit Accountant Suite to view and manage all outstanding client information requests.
- Clients get notification of pending requests automatically, by email and SMS (once permitted).
- Admin users at your firm can control visibility settings to ensure staff and expert roles have appropriate access.

Why

For your firm:

- Get faster client responses with less follow-up effort.
- Miss fewer requests by using a single in-platform inbox for your entire client portfolio.
- Reduce miscommunication and keep close cycles on track with consistent collaboration across your firm.



See it today

This update is available now. [Sign in](#) to visit your **Inbox**.

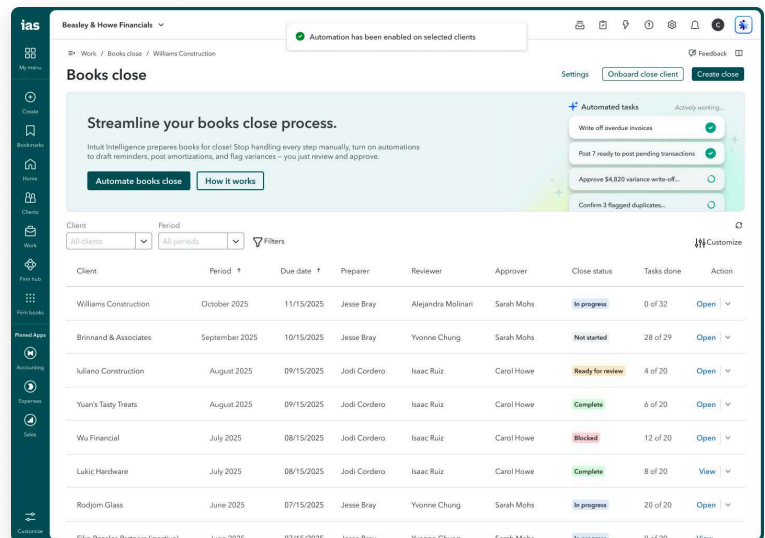
Books close automation

INTUIT
Accountant Suite

COMING SOON

What

- This update combines the books close workflow with:
 - **AI** that automates routine steps end-to-end
 - **Your expertise** for review, within a new queue that surfaces exceptions as soon as they're detected
- The automation provides a full transcript of what the AI completed and recommended for each close.
- This update also delivers improvements to books close such as in-product help content, onboarding, higher task volumes, and transaction checks.



+ Intuit Intelligence is getting these books ready to close

We're reviewing Williams Construction's books in the background. We'll let you know about anything that needs your attention before you close. You can customize the rules and schedule from [Automation hub](#)

First run: Jul 1



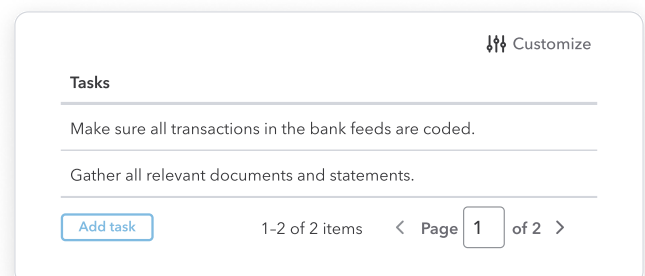
How

- AI automates routine steps of the books close process, flagging exceptions for your review in a firm-wide queue along the way.
- You'll get a transcript of the AI's recommendations and completed tasks.

Why

For your firm:

- Put accountants in control without putting them in the weeds, to deliver client service faster, more consistently, and at greater scale.
- Serve more clients without adding headcount by having AI handle the volume and accountants handle the decisions.
- Receive approval tasks in a firm-wide queue, so they don't get missed in individual client views or during a busy close cycle.
- 73% of firms agree that they save time using Intuit Accountant Suite compared to QuickBooks Online Accountant, based on an April 2026 study.

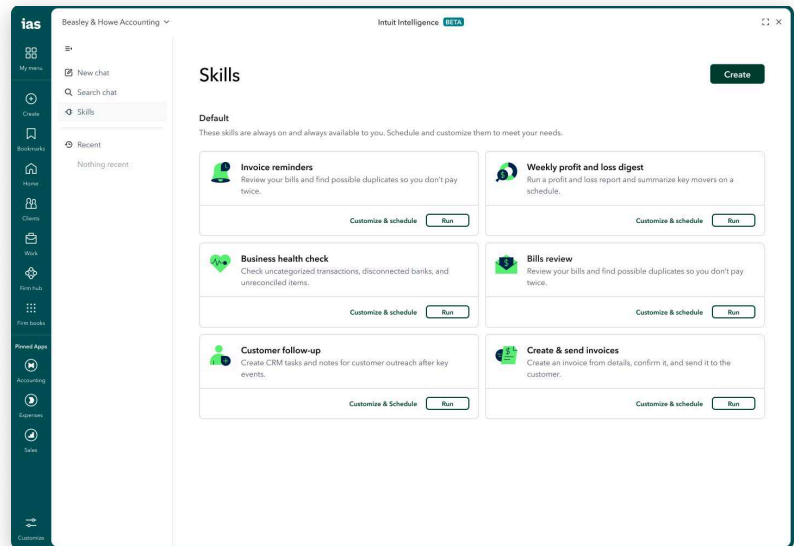


Try it out

Existing Intuit Accountant Suite users can sign up for beta access today. This feature will soon be available for new users.

What

- This is one firm-wide place that accountants and firm admins can build, manage, deploy, and reuse workflows and skills across clients—even in batches of 10-50 at once.
- A firm-level audit trail provides admins complete visibility into every skill action across the entire book of business.



How

- Visit the **Workflow control center** to create or activate a skill, starting from skill templates that are ready to go, or by building a custom skill from scratch.
- Tag the skill to one or more clients, to be deployed automatically and independently.
- Pending AI approval tasks across tagged clients appear in **Needs review** on the Intuit Accountant Suite home screen for one-click review.
- Role-based access applies to workflow control. Only primary and company admins can create, edit, and run skills against your clients' books.

Why

For your firm:

- Use the control center to help standardize how work gets done across your entire practice.
- Build a workflow once and apply it for any client who needs it, rather than taking time to build separate one-off workflows.
- Helps ensure that AI skills are only being run by the right people, for the right clients.



Try it out

This update is available now. [Sign in](#) to visit your **Workflow control center**.

Portfolio-level insights

INTUIT
Accountant Suite

What

For the first time, accountants can see their client portfolio at a glance and check for firm-wide trends and anomalies—without logging into individual files and synthesizing multiple reports.

Clients who need your expertise

Williams Construction

↑ Expenses up 34% , ↓ Cash flow

See why

Brinnand & Associates

↑ Expenses up 28% , ↓ Revenues down 2%

See why

Armond diner

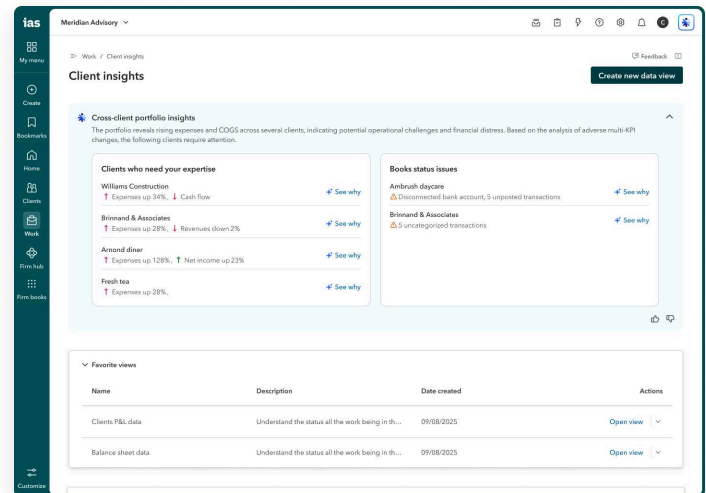
↑ Expenses up 128% , ↑ Net income up 23%

See why

Fresh tea

↑ Expenses up 128% ,

See why



How

- After you log into Intuit Accountant Suite, you can look for firm-level portfolio signals in **Home** or **Advisory**.
- You can then drill into which clients are flagged and view the underlying cross-client data.
- Each accountant will see only the portfolio insights for the clients they're authorized to access, to prevent data leakage across firm users.

Why

For firm partners:

- Helps your team deliver high-value advisory conversations.
- 77% of firms say Intuit Intelligence Chat helps them generate client insights 35% faster on average, based on an April 2026 study.
- Helps transition the firm's service model from reactive bookkeeping to proactive, high-value advisory.

For accountants:

- Focus on advisory conversations instead of data-gathering.
- Identify which clients need attention at-a-glance.



Try it out

This update is available now. [Sign in](#) and visit **Home** or **Advisory** for portfolio-level insights.

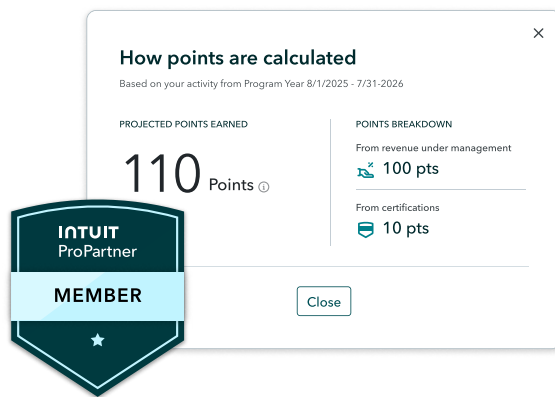
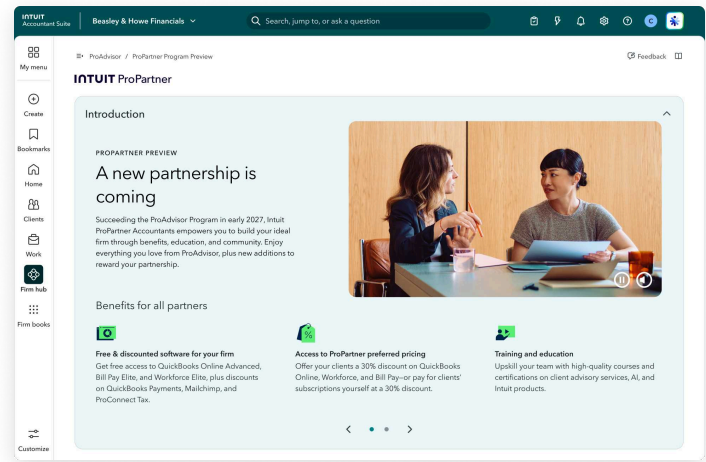
Intuit ProPartner Accountants overview

INTUIT
Accountant Suite

COMING SOON

What

- ProPartner Accountants will launch in early 2027, replacing ProAdvisor as Intuit's global partner program.
- Built natively inside Intuit Accountant Suite, the program will reward firms of all sizes for their full partnerships with Intuit.
- The program has 5 tiers: Member, Partner, Preferred Partner, Premier Partner, and Elite Partner.
- Firms can unlock progressively more valuable benefit levels as they deepen engagement with Intuit.
- Starting in August, firms may preview their projected tier in Intuit Accountant Suite, which is based on their activity from August 2025 to July 2026.



How

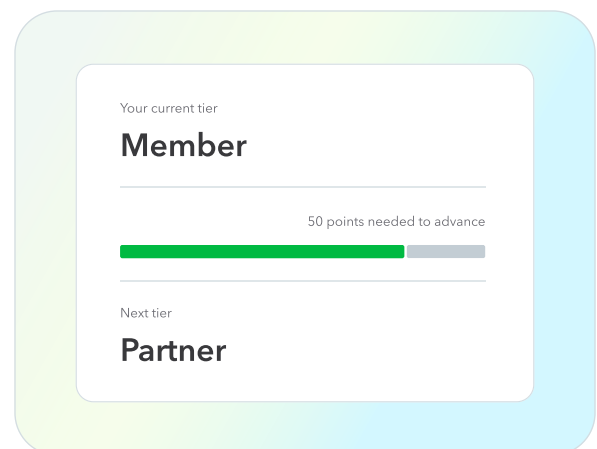
To prepare for launch, we recommend taking 3 foundational steps now:

1. **Switch to Intuit Accountant Suite.** Because ProPartner Accountants is part of Intuit Accountant Suite, your firm will need to switch to the new platform. Your primary admin can visit **Billing and subscriptions** and select **Firm** to make the switch, or [create a new account](#).
2. **Get certified.** To earn a higher tier than Member, your firm's team must include at least one active certification for QuickBooks Online Level 1, QuickBooks Workforce, or Intuit Enterprise Suite.
3. **Consolidate consoles.** To maximize your firm's points, tier, and benefits, consolidate multiple consoles into one account that reflects your book of business.

Why

For firms:

- Status, points, and points-earning opportunities are clearly defined.
- **Expanded benefits** include revenue share for up to 3 years, discounts, dedicated support, and growth tools like client matchmaking.
- **Future-focused education opportunities** include certifications, training, professional development—all of which you can assign and track within the Intuit Accountant Suite **Training manager**.
- **Community connections** include peer groups, events with like-minded firm leaders, plus talent mentorship and recruitment.



Prep for launch

Starting this month, [sign in](#) to Intuit Accountant Suite to preview your projected ProPartner Accountants tier. [Learn more](#) about what you can do now to earn a higher tier at launch.

Learn more

Additional updates



Intuit Workforce Elite: 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.

Intuit Enterprise Suite product release

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

Industry solutions included with Advanced

New industry-specific solutions designed for construction and project-based businesses are now included with QuickBooks Advanced, providing a value of up to \$900 each year.

Check out more new QuickBooks
functionality for your clients

[Learn more](#)