

Intuit QuickBooks Advisor to Client Email Template

Copy and paste this email template to inform your clients about the new QuickBooks Online interface and how you'll support them through the transition.

Subject: An exciting update to your QuickBooks Online Account

Hi [Client Name],

I'm writing to let you know about a new update coming to the QuickBooks Online product we use to manage your business finances.

Starting 10 September 2025, you will have exclusive access to a redesigned QuickBooks Online experience powered by the Intuit platform. This update introduces smarter navigation, enhanced search, and connected tools, all designed to create a simpler and more streamlined way to manage your business.

What this means for you:

- No action required: There's nothing you need to do right now. Your core accounting features and financial data remain unchanged, and all workflows you're familiar with will still be available.
- Improved tools and efficiency: The new interface brings smarter navigation, quick access to essential tools, and improved search to make finding transactions, invoices, or reports easier than ever. Connected apps for bookkeeping, finances, and customer management will also work seamlessly, with deeper integrations arriving soon.

How I'm supporting you:

As your advisor, I'm participating in the early access program to fully understand these changes. My goal is to ensure the transition is seamless for you while identifying the best workflows that will save time and improve efficiency.

We'll work together to refine how you use QuickBooks while preparing for additional features coming in November, such as AI-powered tools designed to automate repetitive tasks and drive productivity.

You can rest assured that I am on top of these updates and committed to ensuring your business runs smoothly through this transition.

Have questions?

I'm here to help you get started confidently! Feel free to reach out if you have any questions, or if you'd like assistance navigating the new interface.

Best regards,
[Your Name/Your Firm Name]