

# Transform your work with a more powerful QuickBooks

Automation where it counts. Human where it matters. QuickBooks, powered by the Intuit platform, is improving your experience and helping you manage more of your work in one place. This toolkit answers questions you and your clients may have about the new experience's features, so you're prepared to make it all work for you, your firm, and your clients. And, QuickBooks will soon offer Intuit's AI agents that help you save time and keep your client relationships strong.

Last updated: 22 August 2025

## Understand the new connected platform

With QuickBooks, essential business tools work together, so you and your clients can stay on top of everything and be ready for anything. Learn how this new experience can save time and boost productivity for you and your clients.



## Find out how to access these improvements

QuickBooks will soon have more powerful features designed to deliver a better experience for everyone. Learn how to opt in and when changes will take place.



## Get answers to common questions

We've got answers that will help make your experience as productive as possible for you and your clients.

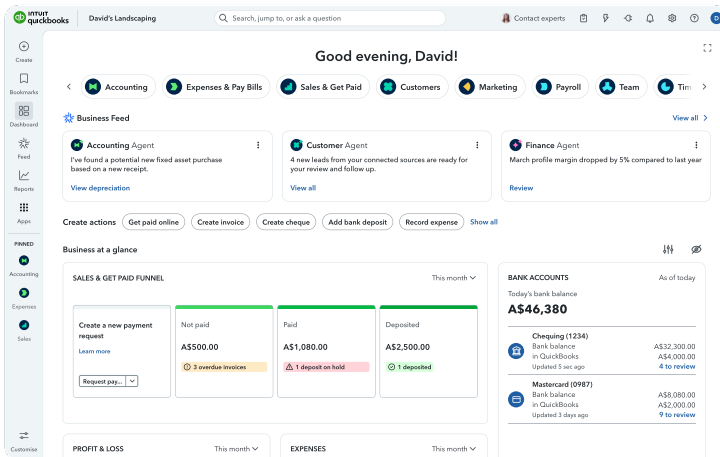
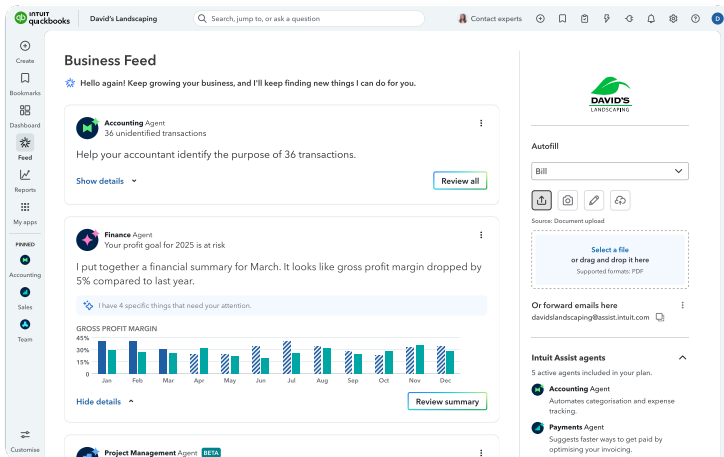


# Understand the new connected platform



All your work,  
all in one place

QuickBooks is introducing updates to help you work smarter, with enhanced reporting, advanced search, and improved client management tools like the Customer Hub and, coming soon, the Business Feed. These updates simplify how you navigate workflows and deliver valuable insights to your clients - all on a more connected platform.



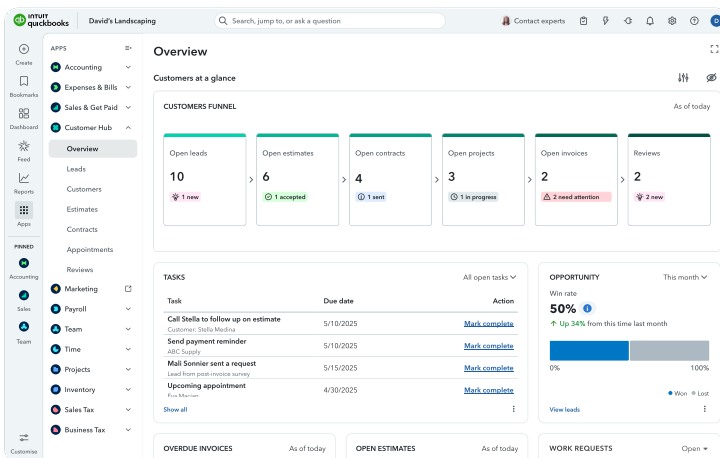
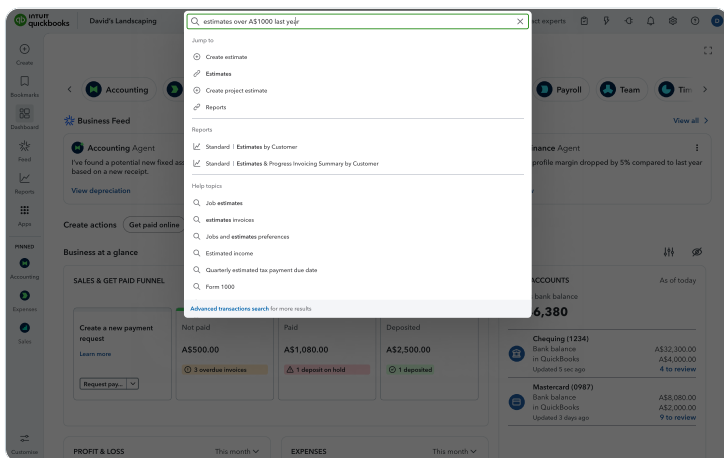
## COMING SOON

### Business feed

See a summary of what's been done for you by AI agents and automation features so you can review and approve the work quickly—and get back to your clients' needs.

### Improved insights and reporting

A customisable performance dashboard comprehensively tracks your clients' financial health and highlights what needs your attention most. Plus, stay on top of business health with P&L and balance sheet insights.



### Smart search

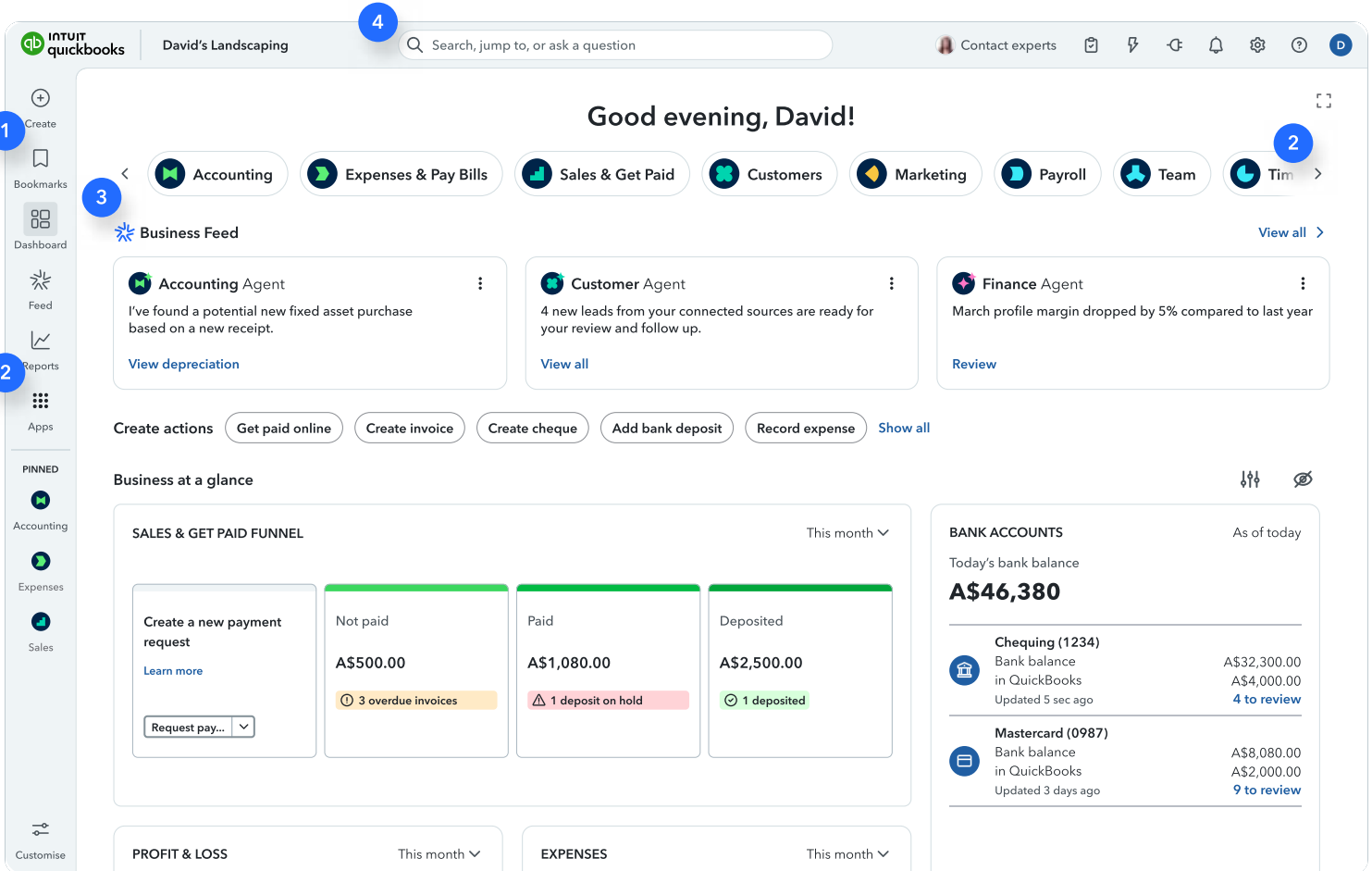
Quickly find transactions, customers, accounts, reports, help, and more with consolidated results from across the platform in the new unified search.

### Customer Hub

Your clients get new CRM functionality to help drive more leads and close more deals. Organise, track, view, and follow up with customers and leads all in one place. Leverage convenient tools to manage everything from capturing referrals to building repeat business.

# Navigate the new experience

QuickBooks is introducing more powerful features to help you get more done – but the fundamentals you know and love are not changing. Use this page to get familiar with the new experience.



- 1 Bookmarks**  
Bookmark your top places and dashboards just like you did in the previous experience.
- 2 App carousel**  
Everything you need is accessible here. Easily switch between apps like Accounting, Expenses, Sales Tax, and Payroll.
- 3 COMING SOON Business feed**  
See a summary of work performed by AI agents in one view so you don't have to go find it.
- 4 Smart search**  
From customers to transactions and more, find what you need quickly across the entire platform.

Global design shown for indicative purposes only. Feature availability varies by product and region.

## We've kept all the features you love

Here's where to find them—and what they're called now

### Menu

Features like Accounting and Expenses previously appeared in the menu



### Apps


Now, Accounting and Expenses are called apps, and appear in the app switcher

### Apps

3rd-party plugins and tools were previously referred to as apps



### Integrations

Now, 3rd-party plugins and tools are called integrations, signified by the  icon

### Dashboard

There was previously only one dashboard accessible from the main menu



### Dashboard plus overviews

Now, the central dashboard has been improved with better customisation. You can also customise new overview pages in some apps

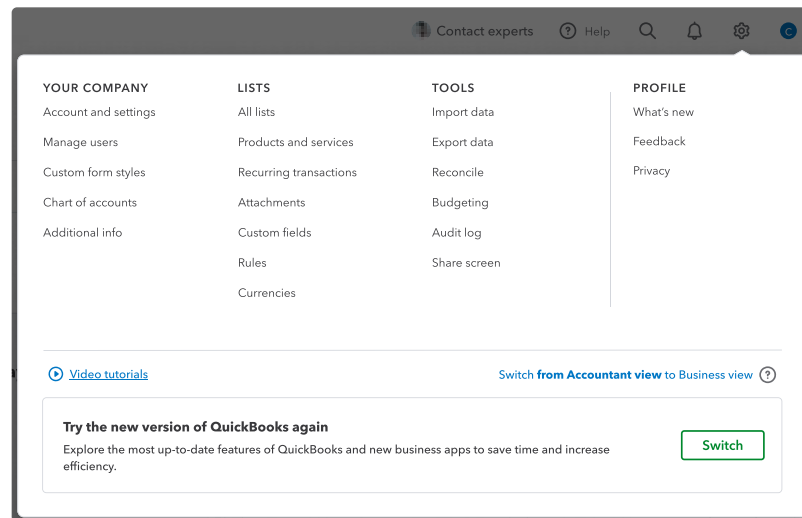
# How and when to access these improvements

## What is early access?

Over the coming weeks, all new and existing QuickBooks Online customers will have the opportunity to opt into this new interface. Early access will be available on Simple Start, Essentials, Plus and Advanced. Ledger will have access at a later date.

## How to opt into early access

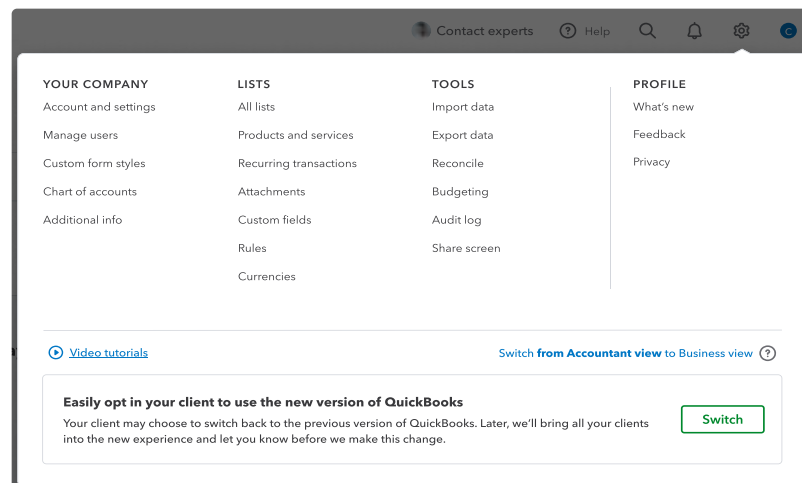
During early access, you or your client can opt in or opt out at any time and revert back to the current QuickBooks Online user interface. To opt a client in or out on their behalf, head to your client's books and click on the settings gear icon on the navigation bar at the top of the screen. You'll see the prompt to switch at the bottom.



If you did not opt into early access but your client did, you will see the new interface when you login to your client's account. A message will appear to let you know of this change and how to manage opt in preferences for that account.

## Opt in multiple clients at once

Save time and keep things consistent by opting all your clients into the new QuickBooks experience in a few easy steps – ensuring everyone is on the same platform and ready to go.



## What will be changing?

QuickBooks is introducing new features and updates to help you work smarter and get more done – while keeping the tools and workflows you're familiar with.

### What will change

- New streamlined navigation
  - Improved consolidated search
  - Improved business feed (coming in November)
- Customer Hub CRM functionality
- Updated customisable reports
- New full-screen mode for more room to work

### What won't change

- Your data. No data is moving, migrating, or changing.
- Manual workflows. You can still perform your jobs in the same way as before, and without automation if you prefer.
- Your pages. All of the pages you're familiar with remain in QuickBooks.
- QuickBooks functionality. All of the same jobs and tasks can be performed as always. No features are being removed.

## When is the new experience available?

### From August 2025

All users will start to receive early access to the QuickBooks user interface on the Intuit Platform.

You and your clients will have the option to opt into and out of the new platform.

### From November 2025

You and your clients will be transitioned to the new platform. You will be notified when this happens.

You can choose to temporarily revert to the previous version of QuickBooks.

QuickBooks AI Agents will be introduced.

### Future

All accounts that opted out or are not currently using the new experience will be moved to the new platform. You'll be notified before this happens.

The previous version of QuickBooks will eventually no longer be available.

## Can I still use the previous version of QuickBooks Online?

Yes, advisors may opt out current QuickBooks Online clients from the new experience. While the previous version will remain available for now, it will eventually no longer be supported. All clients will be automatically moved to the new experience at that time. You will be notified before this change happens.

## Do I have to upgrade to get access to some of these features?

Starting in late August, you and your clients can opt in to experience the redesigned QuickBooks interface, which includes streamlined navigation, improved search, and enhanced tools like Customer Hub.

From November, all customers - including QuickBooks mobile app users - will gain access to some basic AI functionality. Additional capabilities, such as AI agents, will be available with higher-tier plans, offering even more powerful tools to simplify workflows.

## Stay up to date with the new QuickBooks

You and your clients can keep track of all the changes happening across the more powerful QuickBooks on our website.

[Visit website](#)