INTUIT
Accountant Suite

Intuit Accountant Suite transition playbook

Your guide to a smooth and successful rollout for your firm

What you'll find inside

- Before you begin
- Switching to Intuit Accountant Suite
- A seamless transition
- Steps for a successful rollout
  - Assembling your crew
  - Prepping your communication plan
  - Completing your communication plan
- Get to know Intuit Accountant Suite

© 2026 Intuit Inc. All rights reserved.

Before you begin

Here are a few points to help orient you to this guide.

Soon, your firm will be moving from QuickBooks Online Accountant (QBOA) to the more powerful Intuit Accountant Suite. Switching platforms is technically simple. And, we'll help you with the coordination, communication, and confidence you'll need to lead your firm through the transition.

This deck is for admins responsible for toggling from QuickBooks Online Accountant to Intuit Accountant Suite and rallying a team around the change.

Use this deck to seamlessly move to Intuit Accountant Suite and/or you're responsible for rolling this out across your firm.

© 2025 Intuit Inc. All rights reserved.

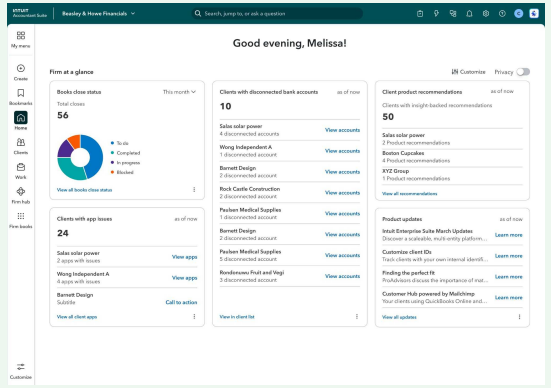
Switching to Intuit Accountant Suite Core is simple and free

Making the switch is as easy as visiting QuickBooks Online Accountant and toggling to the updated platform—no complex migration necessary.

- Firms with multiple QuickBooks Online Accountant consoles can switch them all to Intuit Accountant Suite. Consolidating accounts is not required.
- All client data will transfer automatically, including existing user roles and access permissions.
- Since only primary and company admins can initiate the switch, be sure to pass this guide to them. That way, your firm can best follow this change management plan and coordinate a smooth rollout.

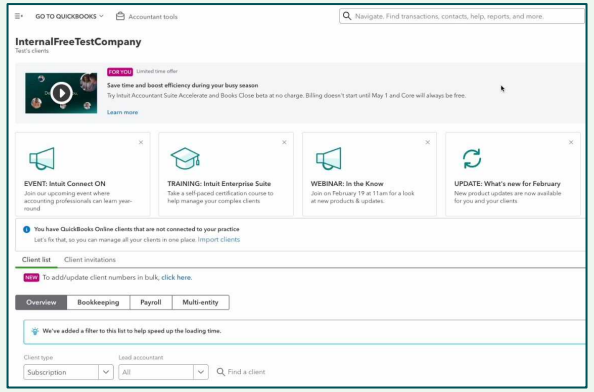
1

Identify the Primary or Company admin(s)



2

Make the switch to Intuit Accountant Suite



© 2025 Intuit Inc. All rights reserved.

A seamless transition

The goal of this project is to transition your firm to Intuit Accountant Suite with minimal disruption to your work.

Use this playbook as your central resource for managing your timeline, equipping your team, and leading a successful launch.

Project goal

Transition your firm to Intuit Accountant Suite with minimal disruption.

Your go-live date

Month DD, YYYY

© 2025 Intuit Inc. All rights reserved.

Steps for a successful rollout

1. **Step 1:** Assembling your crew

2. **Step 2:** Prepping your communication plan

3. **Step 3:** Completing your communication plan

© 2025 Intuit Inc. All rights reserved.

Step 1: Assembling your crew

Set your team up for success with 1-2 designated leads.

Project lead/champion

This is you, the overall owner of the transition, responsible for tracking the timeline and the relationship with Intuit.

Key responsibilities

- Establishes a clear path for team questions (e.g., a specific person, email address, or submission form)
- Acts as the designated “power user” and go-to resource, so the whole team can easily preview Intuit Accountant Suite

Communications lead

This is the voice of the transition, ensuring everyone has the right info at the right time. (This may be the same person as the Project Lead.)

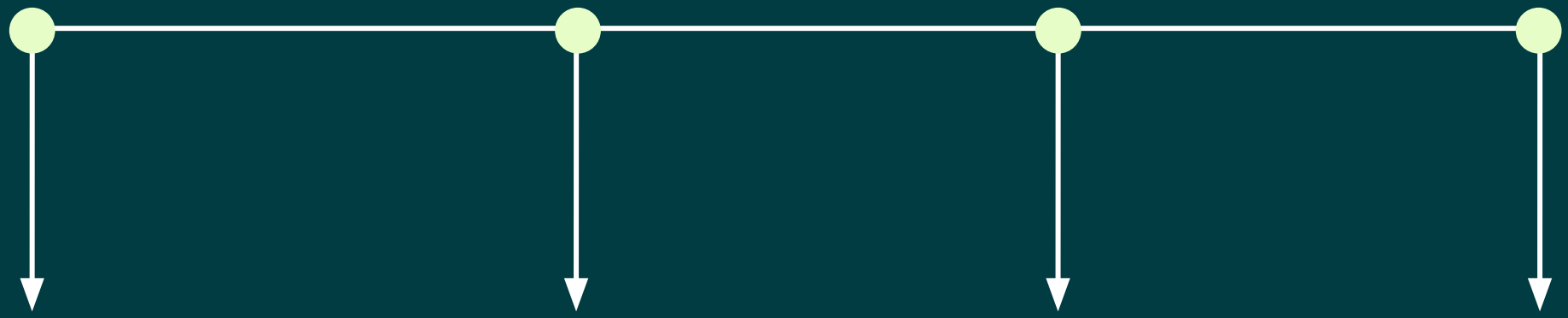
Key responsibilities

- Sends all pre-launch, go-live, and post-launch emails
- Manages related announcements through additional channels like Slack or Microsoft Teams

© 2025 Intuit Inc. All rights reserved.

Step 2: Prepping your communication plan

Here's an overview of how you'll share go-live updates with your firm.



T-minus 1 week
The heads-up

Announce the change and provide initial resources.

T-minus 2 days
The resource reminder

Remind the team and point to training materials.

Day 0
Go-live day

Announce the switch is coming.

Day 1-2
The check-in

Follow up to ensure a smooth adoption and help anyone who is struggling.

© 2025 Intuit Inc. All rights reserved.

Step 3: Completing your communication plan

Effective communication is critical. This section contains ready-to-send email templates for each phase of your rollout. Each template includes the strategic goal, timing, and customizable text.

© 2025 Intuit Inc. All rights reserved.

The announcement email

Goal: Send a “heads up” message to create excitement and reassure staff that their workflow won’t break.
Send date: T-minus 1 week

SUBJECT LINE
Coming Soon: An evolution from QuickBooks Online Accountant to Intuit Accountant Suite

Hi Team,
On **[Month DD, YYYY]**, our firm’s console of QuickBooks Online Accountant is changing to Intuit Accountant Suite!

Good news: You’ll have all your current functionality in a new customizable user interface. Also, all your client data, and reports will remain safe and untouched.

The change: Intuit Accountant Suite includes everything in QuickBooks Online Accountant, plus much more:
- Capabilities to manage our firm, clients, and team all on one AI-powered platform
- Tools that boost efficiency, streamline operations, and help us make faster, more confident decisions
- New and improved design navigation and home dashboard

Action needed: Follow the steps below to familiarize yourself with Intuit Accountant Suite and be prepared for the new experience on **[Month DD, YYYY]**.

➔ Step 1: Become acquainted with the new interface experience through this webinar.
➔ Step 2: Review and save this reference guide on what’s changing, and check out this article.
➔ Step 3: Submit your unanswered questions to project-questions@yourfirm.com.

We will send out a reminder next week ahead of the change—no downtime is expected.

Best,
The Project Lead

© 2025 Intuit Inc. All rights reserved.

The reminder email

Goal: Remind teams of the upcoming switch, and provide info and tools to those who didn't see the first email.
Send date: T-minus 2 days

SUBJECT LINE
Critical reminder: An evolution from QuickBooks Online Accountant to Intuit Accountant Suite

Hi Team,
Just a quick reminder that on **[Month DD, YYYY]**, we will be switching to the new Intuit Accountant Suite.

Since things have moved around slightly, remember to review the training and content linked below and in the attachment.

Please review and become familiar with the following:
- Updated navigation menu
- Where to find your [Specific features, e.g. Reports]
- New shortcuts to save you time

Note: Your current login will still work, and all your existing data is already there.

➔ Step 1: Become acquainted with the new interface experience through this webinar.
➔ Step 2: Review and save this reference guide on what's changing, and check out this article.
➔ Step 3: Submit your unanswered questions to project-questions@yourfirm.com.

Best,
The Project Lead

© 2025 Intuit Inc. All rights reserved.

The go-live email

Goal: Remind the team that your switch to Intuit Accountant Suite is happening today.
Send date: Day 0

SUBJECT LINE
ACTION: The new Inuit Accountant Suite is going live!

Hi Team,
Intuit Accountant Suite is going live at **[Time]** today. You'll see the new experience when you refresh or log into QuickBooks Online Accountant.

Quick Tips:

- Your login credentials remain the same.
- If you can't find a specific button, refer to the training video and material
  - Become acquainted with the new interface experience through this webinar.
  - Review and save this reference guide on what's changing, and check out this article.
- If you get stuck, please reply to me or use the in-product Support/Chat button.

Happy working!

The Project Lead

© 2025 Intuit Inc. All rights reserved.

The check-in email

Goal: Reach out to any users who may be struggling.
Send date: Day 1-2

SUBJECT
Quick check-in: How's the new Inuit Accountant Suite?

Hi Team,
We are a few days into Intuit Accountant Suite, and I wanted to quickly check in to see how everyone is adjusting.

I know it takes a moment to get familiar when buttons have moved around, so thank you for your patience during the switch.

A few reminders:

- Need a refresher? I've re-attached the training material in case you need a quick reference.
  - Become acquainted with the new interface experience through this webinar.
  - Review and save this reference guide on what's changing, and check out this article.
- Stuck? If you're running into any technical glitches or simply can't find a specific feature, please reply to this message or ping me directly.

We want to make sure this new version is helping you move faster.

Best,
The Project Lead

© 2025 Intuit Inc. All rights reserved.

Intuit Accountant Suite resources

Overview Video: Intuit Accountant Suite

See the new platform in action.

Reference guide: What's changing in Intuit Accountant Suite

Dig into the improvements and added features in Intuit Accountant Suite as compared to QuickBooks Online Accountant.

IAS Deep Dive article

Learn more about the benefits of Intuit Accountant Suite.

Console Consolidation guide

Learn about how to consolidate your accounts from QuickBooks Online Accountant to Intuit Accountant Suite.

QBOA to IAS Video

Explore the changes between QuickBooks Online Accountant and Intuit Accountant Suite.

© 2026 Intuit Inc. All rights reserved.