

A new solution to manage your firm, clients, and team

Intuit Accountant Suite is an AI-powered platform built to run your firm in one place. As the next generation of QuickBooks Online Accountant, Intuit Accountant Suite helps you boost efficiency, streamline operations, and inform faster decisions. Ask anything in Intuit Intelligence chat to help drive action and measurable growth.** Plus, count on Intuit AI to get more done so your team can focus on high-value services.**

What you can expect

With an enhanced workspace, Intuit Accountant Suite is designed to help firms elevate client services and bring firm growth opportunities to light. All the work you do in QuickBooks Online Accountant will be possible in Intuit Accountant Suite—bringing your firm, clients, and workflows together in one centralized system.

Highlights of the suite include:

All your client files, all in one place

Manage all your QuickBooks Online client files with one sign-in to Intuit Accountant Suite—no need to sign into multiple accounts.**

The future of client advisory

Intuit Intelligence chat helps you make decisions for your firm and clients faster, by turning questions into clarity.**

Personalised dashboards

The new customisable Home screen surfaces important info for each team member, to stay focused on what matters.

Read on for a closer look

To help you get familiar with the new experience, the following pages detail improvements and added features in Intuit Accountant Suite as compared to QuickBooks Online Accountant.



Your Home dashboard is specific to your role and access, surfacing your most urgent tasks, reminders, and insights each day.

1

Intuit Intelligence chat**

Start here to ask anything and get instant, contextual answers in clear, concise language.

2

App carousel

Everything you need is accessible here. Easily switch between apps like Accounting, Clients, and Expenses.

3

Widgets

Firm leads can track firm performance through dashboard widgets that surface key financial data.

4

Customisation

Team members can further customise their dashboard by resizing and relocating widgets to maximise efficiency.

**Intuit Intelligence in clients' books is only available by upgrading to Accelerate, a paid plan within the Intuit Accountant Suite. Intuit Intelligence in firm's books is available in Core. Intuit Intelligence chat has a cap of 200 questions in Core and 1000 questions in Accelerate during the beta period.

Left menu

The customisable, left-side navigation menu is designed specifically for accounting firms, with a modern look and feel, and streamlined interactions. Hover on the items that have subsections to quickly see more destinations you can click to.

1 **Client dropdown:** Now labeled with your firm's name, you can use it to switch views between clients

2 **My menu:** Your new customisable access point for Accountant tools

3 **Service delivery** section: Find apps for client service, to help you:

- Provide bookkeeping services
- Monitor cash flow & capital
- Prepare & file taxes
- Advise clients

4 **Firm operations** section: Find apps for your firm's work to help you:

- Manage your clients and add new clients
- Manage your finances
- Manage your team
- Manage your growth
- Manage your risk

5 **Customisable left navigation:** Pin your most-needed apps to reach them quickly

The screenshot displays the Intuit Accountant Suite interface for the firm "Beasley & Howe Financials". The interface is divided into three main sections: a left navigation menu, a central content area, and a right-hand panel.

Left Navigation Menu:

- 1 Client dropdown:** Located at the top right of the menu, it displays the firm's name "Beasley & Howe Financials" with a dropdown arrow.
- 2 My menu:** A section containing icons for "Create", "Bookmarks", "Home", "Clients", "Work", "Firm Hub", and "Firm Books".
- 3 Service delivery section:** A section containing icons for "Work", "Projects", "All tasks", "Pro Tax", "Client Insights", and "Books Close".
- 4 Firm operations section:** A section containing icons for "Clients", "Team", "ProAdvisor", "Accounting", "Expenses & Bills", "Sales & Get Paid", "Customer Hub", "Payroll", "Time", "Projects", "Inventory", "VAT", and "IncomeTax".
- 5 Customisable left navigation:** A section at the bottom containing a "Customise" icon.

Central Content Area:

- SERVICE DELIVERY:** Contains a list of items: "Work", "Projects", "All tasks", "Pro Tax", "Client Insights", and "Books Close".
- FIRM OPERATIONS:** Contains a list of items: "Clients", "Team", "ProAdvisor", "Accounting", "Expenses & Bills", "Sales & Get Paid", "Customer Hub", "Payroll", "Time", "Projects", "Inventory", "VAT", and "IncomeTax".

Right-hand Panel:

- Client list:** A section titled "Client list" showing a list of clients with their names and photos. The first client is "Amy's Bird Sanctua" (Amy Keller). Other clients listed include "Cool Cars", "CC Solar Power", "Dukes Basketball Camp", "Grasshopper Landscaping", "Heim Hardware", "Kookies by Kathy", "Larson Media", "Rago Travel Agenc", "Rocha Rental Equipment", and "Salas Solar Power".

Clients

Get centralised, consolidated client data, all in one place.**

INTUIT Accountant Suite | Beasley & Howe Financials | Search, jump to, or ask a question

My menu | Clients / Client list

Clients

Client type: All | Search | Customise

Name	Client number	Accounting solutions	Other products	Attached apps	Client type	Actions
<input type="checkbox"/> Amsbaugh	007121	QuickBooks Advanced	QuickBooks Online	Spreadsheet Sync	Business	Edit client
<input type="checkbox"/> Brinnand & Associates	007122	QuickBooks Advanced	QuickBooks Online	Spreadsheet Sync	Business	Edit client
<input type="checkbox"/> Luliano Construction	007123	QuickBooks Simple Start	QuickBooks Online Payroll	-	Business	Edit client
<input type="checkbox"/> Yuan's Tasty Treats	007124	QuickBooks Simple Start	QuickBooks Online Payroll	-	Business	Edit client
<input type="checkbox"/> Wu Financial	007125	QuickBooks Plus	QuickBooks Online Payroll	Asana	Business	Edit client...
<input type="checkbox"/> Lukic Hardware	007126	QuickBooks Plus	QuickBooks Online Payroll	Asana	Business	Edit client
<input type="checkbox"/> Rodjom Glass	007127	QuickBooks Ledger	-	-	Business	Edit client
<input type="checkbox"/> Fike-Rosales Party Sup..	007128	QuickBooks Simple Start	QuickBooks Online Payroll	Monday.com	Individual	Edit client
<input type="checkbox"/> Mallenhally Landscapi...	007129	QuickBooks Simple Start	QuickBooks Online Payroll	Asana	Business	Edit client
<input type="checkbox"/> Tracy's Framing	007130	QuickBooks Ledger	-	PowerBL	Business	Edit client

1-50 of 300 items | Page 1 of 6

INTUIT Accountant Suite | Beasley & Howe Financials | Search, jump to, or ask a question

My menu | Clients / Client list

Clients

Client type: All | Search | Customise

Name	Client number	Accounting solutions
<input type="checkbox"/> Amsbaugh Daycare	007121	QuickBooks Advanced
<input type="checkbox"/> Brinnand & Associates	007122	QuickBooks Advanced
<input type="checkbox"/> Luliano Construction	007123	QuickBooks Simple Start
<input type="checkbox"/> Yuan's Tasty Treats	007124	QuickBooks Simple Start
<input type="checkbox"/> Wu Financial	007125	QuickBooks Plus
<input type="checkbox"/> Lukic Hardware	007126	QuickBooks Plus

1 Client list location and critical data

Locate your **Client list** within **Firm operations**, and track critical data like client type, client custom fields, and attached apps

Manage custom fields | Add client

Customise

Other products	Attached apps	Client type	Actions
Books Online	Spreadsheet Sync	Business	Edit client
Books Online	Spreadsheet Sync	Business	Edit client
Books Online Payroll	-	Business	Edit client
Books Online Payroll	-	Business	Edit client
Books Online Payroll	Asana	Business	Edit client...
Books Online Payroll	Asana	Business	Edit client

2 Adding clients

This process remains the same, but with optimised performance

What kind of view would you like to create?

Use templates

- Advanced financial KPIs**
Gain clear insights into your clients' financial status with AI-driven analytics.
[Create dashboard](#)
- Client financial information overview**
Manage your clients' finances with this dashboard.
[Create dashboard](#)
- Track your clients' bookkeeping status**
Keep tabs on your clients' books with our bookkeeping status dashboard.
[Create dashboard](#)

3 Client Insights

Get quick visibility of bank connection issues, unposted transactions, total transactions, and last close date

Intuit Accountant Suite makes taking care of client work simpler than ever.

Projects

Notifications Manage templates Create project

Filters: Clients: All, Due date: 06/01/2025 - 06/01/2026, Status: To do, In progress, Blocked, Assigned to: All

Client Name	Project Name	Due Date	Status	Tasks Done	Assigned To	Actions
Larson Media	March bookkeeping	24/02/2025	To do	0 of 20	Yvonne Chung	⋮
Larson Media	Payroll	25/02/2025	To do	0 of 20	Yvonne Chung	⋮
Panelli Rentals	Payroll	28/02/2025	In progress	4 of 20	Alejandra Molinari	⋮
Rock Castle Construction	Payroll taxes	24/03/2025	In progress	4 of 20	Alejandra Molinari	⋮
Pye's Cakes	Monthly Bookkeeping	24/03/2025	In progress	4 of 20	Alejandra Molinari	⋮
Weiskopf Consulting	Payroll setup	25/03/2025	Blocked	4 of 20	Alejandra Molinari	⋮
Heim Hardware	BAS preparation	26/03/2025	Blocked	4 of 20	Yvonne Chung	⋮
Eckert Electronics	June Bookkeeping	24/04/2025	To do	0 of 5	Yvonne Chung	⋮
Wong Independent Appraisals	Monthly Bookkeeping	24/04/2025	To do	0 of 50	Yvonne Chung	⋮
Rocha Rental Equipment	Monthly Bookkeeping	25/04/2025	In progress	2 of 10	Yvonne Chung	⋮
Barnett Design	BAS preparation	25/04/2025	In progress	2 of 10	Yvonne Chung	⋮
Barnett Design	Payroll	26/04/2025	In progress	2 of 10	Yvonne Chung	⋮

Projects

Filters: Clients: All, Due date: 06/01/2025 - 06/01/2026, Status: To do, In progress, Blocked, Assigned to: All

Client Name	Project Name	Due Date	Status	Tasks Done	Assigned To	Actions
Larson Media	March bookkeeping	24/02/2025	To do	0 of 20	Yvonne Chung	⋮
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Pye's Cakes	Monthly Bookkeeping	24/03/2025	In progress	4 of 20	Alejandra Molinari	⋮
Weiskopf Consulting	Payroll setup	25/03/2025	Blocked	4 of 20	Alejandra Molinari	⋮
Heim Hardware	BAS preparation	26/03/2025	Blocked	4 of 20	Yvonne Chung	⋮
Eckert Electronics	June Bookkeeping	24/04/2025	To do	0 of 5	Yvonne Chung	⋮
Wong Independent Appraisals	Monthly Bookkeeping	24/04/2025	To do	0 of 50	Yvonne Chung	⋮

New location for Work

Find **Projects** and **All tasks** in **Work**, under **Service delivery**

All tasks

Filters: Task, Project, Client, Status, Assigned to, Due date, Actions

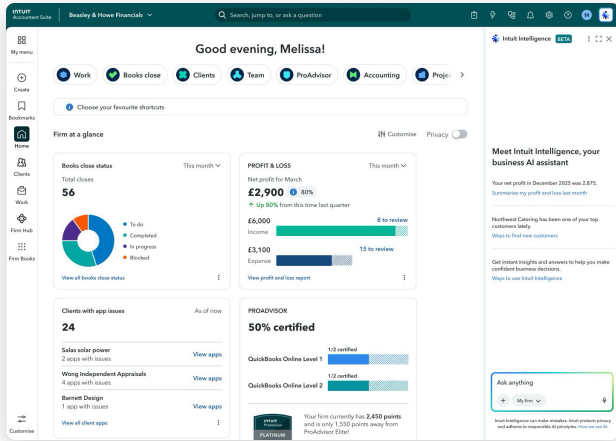
Task	Project	Client	Status	Assigned to	Due date	Actions
Bill reminder	Monthly Book...	Larson Media	CREDIT	Yvonne Chung	Overdue 14/02/2025	Mark complete
Approve invoice #1234 for C...	Monthly Book...	Panelli Rentals	RECEIVABLE	Yvonne Chung	Overdue 14/02/2025	Mark complete
Receive payment for invoice #...	Monthly Book...	Rock Castle Construction	CREDIT	Yvonne Chung		Mark complete
Categorise 20 transactions	Monthly Book...	Pye's Cakes	CREDIT	Alejandra Molinari		Mark complete
Set up your payroll	Monthly Book...	Weiskopf Consulting	BLOCKED	Alejandra Molinari		Mark complete
Bill approval	Monthly Book...	Heim Hardware	COMPLETED	Alejandra Molinari	20/02/2025	Mark complete
Review employee time sheets	Monthly Book...	Heim Hardware	COMPLETED	Alejandra Molinari	21/02/2025	Mark complete
Project update checklist	Monthly Book...	Barnett Design	COMPLETED	Alejandra Molinari	22/02/2025	Mark complete

Updated layout

The simplified list-based layout from QuickBooks Online Accountant is what you'll see here—the older kanban board layout will no longer be available

New features

You'll find several updates in Intuit Accountant Suite designed to help you and your team save time and streamline firm, clients, and team management in an all-in-one, AI-powered platform.



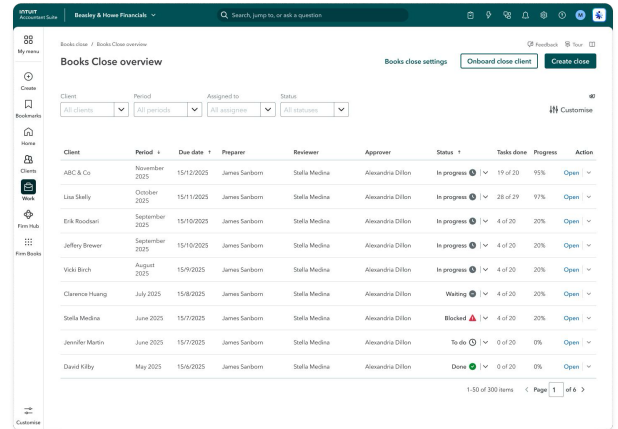
Spot and resolve issues faster

- Intuit AI monitors your entire client portfolio, proactively identifying important trends and anomalies across financial KPIs, payroll data, and more.**
- Beta: Connect with clients in real time and track conversations in one secure hub, to clarify transactions more efficiently. Deliver added expertise more easily from Requests, which now includes clients' rerouted Intuit Intelligence chats.
- Beta: Get portfolio-level insights using Intuit Intelligence chat. Ask sophisticated questions for immediate, real-time insights to help uncover meaningful information without manual analysis.**

BETA

Close books faster and consistently at scale**

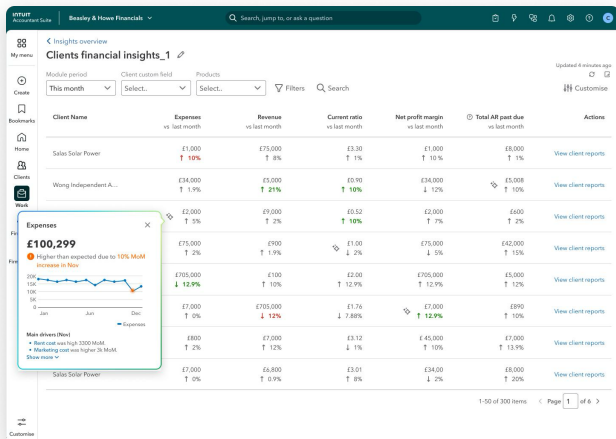
- Use a single, centralized dashboard to manage all close activities.
- Tailor your firm's review and close process at scale with customisable templates to help standardize the quality of your service delivery.
- Assign tasks to multiple team members to manage month-end close workflows with efficiency, and connect with clients from one secure hub to resolve transaction issues faster.



BETA

Monitor the KPIs that matter most

- Client Insights provides an overview of your clients, with customisable views and segments, so you can surface the right insights and key benchmarks.**
- Beta: Track clients' KPIs across their data from QuickBooks.** Detect anomalies automatically, using AI.
- The Home dashboard, customisable for every team member, surfaces daily tasks, reminders, and insights to help them focus on their most important work.



Important product and disclaimer information

**Features

Intuit AI: Requires upgrading to Accelerate, a paid plan within the Intuit Accountant Suite.

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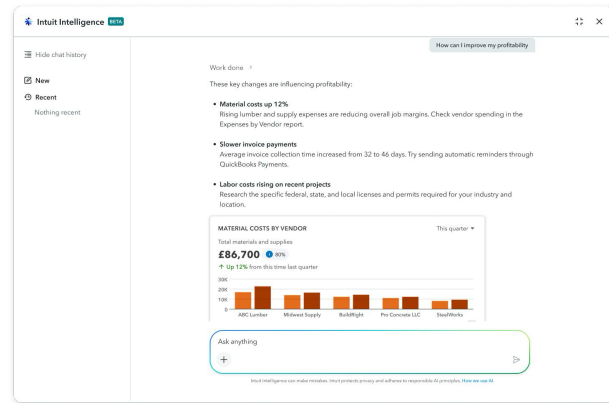
Coming soon: This information is intended to outline our general product direction but represents no obligation and should not be relied on when making a purchasing decision. Additional terms, conditions, and fees may apply with certain features and functionality. Eligibility criteria may apply. Product offers, features, and functionality are subject to change without notice.

Close books faster at scale: Requires adding Books Close, a paid add-on to Intuit Accountant Suite. Fees apply.

Client Insights/Track clients' KPIs: Requires upgrading to Accelerate, a paid plan within the Intuit Accountant Suite.

We're just getting started

Intuit Accountant Suite is actively evolving with feedback from firms like yours, to help ensure it does what you need. Here's a sneak peek of what's to come.

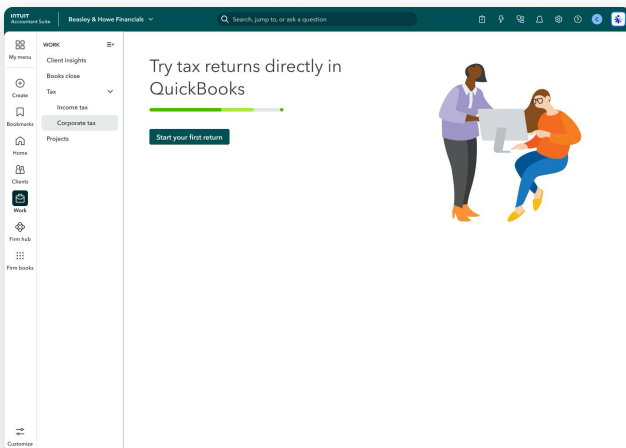
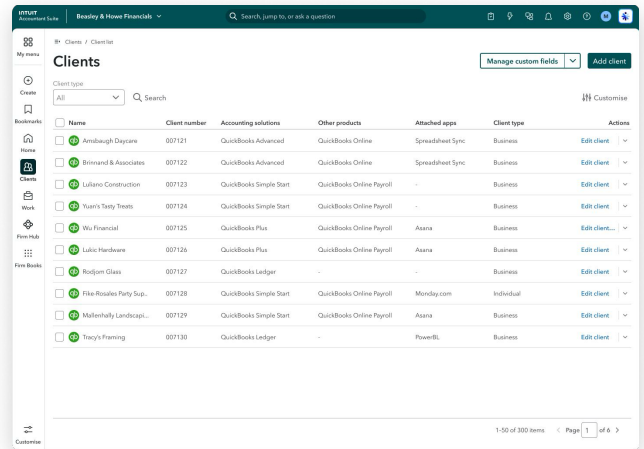


The future of strategic client advisory is intelligence**

- Any question, answered instantly—from “What are the top 5 things I need to know about this client’s books?” to “Which clients does my firm spend the most time on?”—for instant, contextual answers in clear, concise language.
- Get deeper insights, so everyone can grow and scale efficiently. Intuit Intelligence understands the size, industry, and seasonality of both your firm and your clients’ businesses.
- Coming soon: Compare financial data across your entire client portfolio to help uncover meaningful information and immediate, real-time insights without extensive effort.

The work you do, all in one place

- Manage all your client files with one sign-in to Intuit Accountant Suite—no need to sign into multiple QuickBooks Online accounts.**
- Organize your client list based on any segment you define, like industry, region, or office, using client custom fields.**
- Assign teams and clients in bulk through custom role-based access groups that align to your firm’s structure. View team and client groups with all-in-one, firm-wide groupings.**
- Coming soon: Open multiple QuickBooks Online client files simultaneously in Intuit Accountant Suite.



Bridge the gap from books to tax with Pro Tax

- With Pro Tax in Intuit Accountant Suite, go from managing your clients’ books to filing tax returns, all in one place. Use autopopulated client data, in-product tax tools, automation, and error flagging.

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Manage client data with one sign-in/in one place: Access client files that are connected to your Intuit Accountant Suite solution.

Client custom fields: Access client files that are connected in to your Intuit Accountant Suite solution.

Assign teams and clients with role-based access groups: Requires upgrading to Accelerate, a paid plan within the Intuit Accountant Suite.

Learn more

To learn more about Intuit Accountant Suite, visit quickbooks.intuit.com/uk/accountants/intuit-accountant-suite/