



Meet your virtual team

Intelligent agents acting as your virtual team
so you can focus on building your business



Automation where it counts.
Human when it matters.

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The future of business isn't automated - it's autonomous



Nick Williams,
International Director of Product
Intuit QuickBooks

At Intuit we keep human expertise at the centre of everything we build. We believe the future of growth will be built on the partnership between human intelligence and artificial intelligence.

Human intelligence brings judgement, empathy and strategic vision. AI brings speed, scale and the ability to act across fragmented systems. Together, they can transform efficiency from a back-office exercise into the engine of prosperity.

I have seen this evolution firsthand. We began with automation – reducing manual effort and improving accuracy in routine workflows. We moved to predictive AI – surfacing insights, forecasting cash flow and highlighting anomalies. Now we are entering the era of intelligent systems that can plan and act within guardrails. The human remains firmly in control, but the heavy lifting is done for them. It is a practical reality, already helping businesses save hours every month and redirect leadership attention towards growth.

This shift is about more than technology. It is about creating freedom. For accountants, that means capacity to focus on higher-value advisory work and protect margins. For businesses, it means time to deepen customer relationships and build resilience. For growing companies, it means consolidating systems, shortening close cycles and freeing bandwidth to plan and scale.

This is the future we are building: one connected platform where AI and human expertise work side by side, so every decision is clearer, every cycle is shorter and every hour is worth more.

For more than 40 years, Intuit has been leading the industry in delivering impactful customer experiences that help millions of consumers and businesses put more money in their pockets, helping them achieve their business and financial goals with less effort and complete confidence.



This isn't a feature race. It's a foundational shift in how businesses operate and we are leading the shift. **The future of running your business is here** and our intelligent connected systems work so people can lead.

The connected platform redefining how you run your business



Intuit's AI-driven expert platform is transforming how businesses run and grow with first-of-its-kind agentic AI experiences. When our vast amounts of data and AI capabilities are combined with the power of trusted human experts, *Intuit's uniquely designed, integrated platform unlocks next-level efficiencies, profitability, and growth for businesses.*



The business world is shifting again but this time, it's not incremental. For decades, software has helped people record and report what happened. ***But growth today demands more than hindsight. It requires systems that act.***

Intuit QuickBooks is building something entirely different to an old model: a platform that reduces repetitive work and connects data, workflows and decisions across your business. By reducing manual work and admin, you can focus on building, leading, not managing.

The difference that defines the platform

Every innovation starts with a customer problem, not a technology trend. We've spent years refining how human intelligence and machine intelligence work together to drive growth.



Not another feature set – a foundational evolution.

We're redefining what financial management means by creating a system that thinks, acts and learns – helping you lead, not just record.



Connected by design, not by integration.

Every part of the Intuit QuickBooks ecosystem – accounting, payroll, sales, projects, and marketing – works together through a single intelligent fabric. All brought together in a connected dashboard. While others focus on add-ons. We build systems that speak the same language.



Powered by GenOS, the architecture we've built and own.

A proprietary operating system that connects data, learning and action across our ecosystem – technically and economically difficult to replicate.



Over a decade of investment in data and AI

Our systems have evolved through years of real-world deployment, learning from billions of transactions and customer interactions. We test and scale in a mature US market and deliver this innovation to the world.



Nearly \$3 billion invested in R&D annually.

This scale of continuous innovation ensures reliability and trust at a level many can't match. We've been building the architecture that powers modern business – refining, learning and investing.



A network of 100 million customers.

Connecting 24 000 financial institutions and processing 20 billion transactions a year, turning every data point into collective intelligence that strengthens the platform for all.

Your moment

Every business faces the same core challenges – finding customers, managing money, ensuring compliance, and delivering work. In legacy systems, these can sit in silos, demanding hours of manual effort.

Intuit QuickBooks unifies them.

Your virtual team of intelligent agents works together – each expert in its domain, all sharing data and context.



In our world, generic AI isn't helpful. There's a reason our agents share the same naming convention as the hero jobs they're doing. They're trained to be very good at specific things.



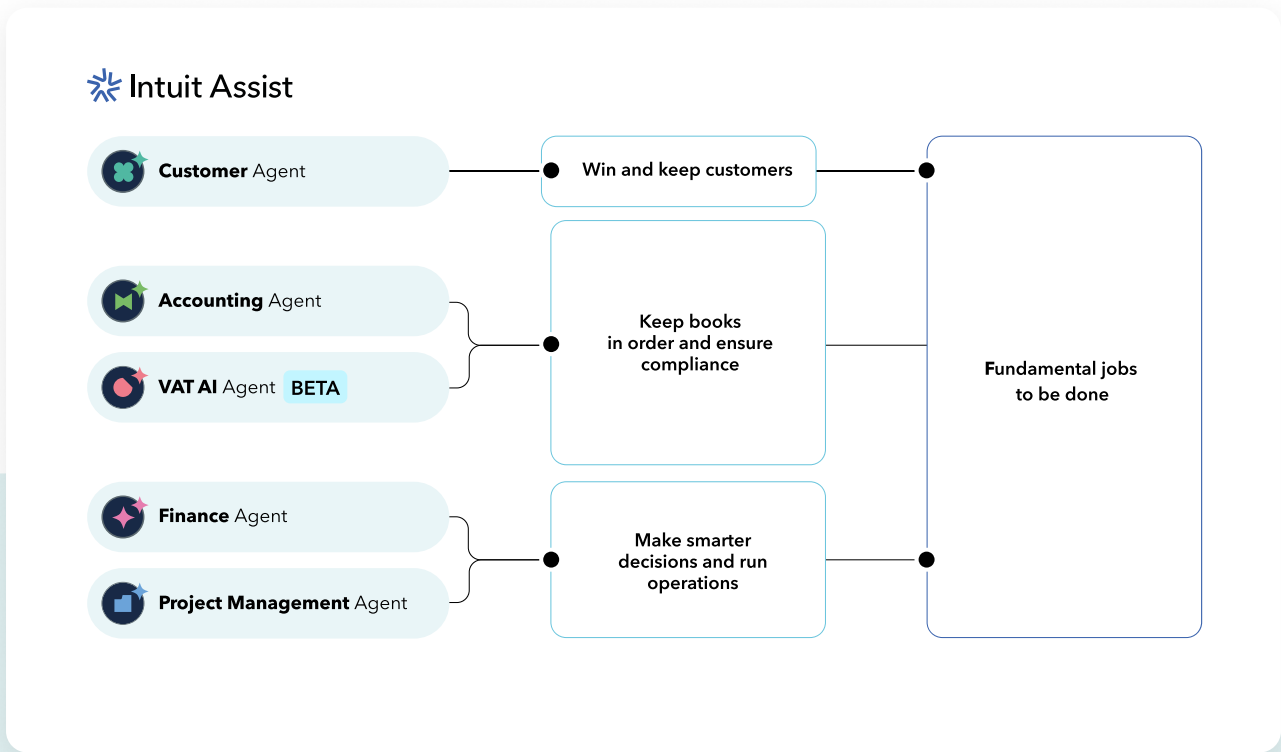
Hamilton Jones

Staff Product Manager, Intuit QuickBooks

This is where intelligence becomes leverage – helps you do the work, while you lead the vision.

Our ecosystem brings the intelligence of the system and the judgement of the human together - to get real work done, not just generate answers.

The following diagram illustrates how this team is organised around your fundamental needs:



*I like that we are calling them agents, and that we are hiring our agents as part of the team. They are specialised, so if I ask agent A to do a task, **I can be confident it will finish that task**. That is very different from generic AI. Agents can also take on the tasks accountants hate, like chasing for missing data, checking it, and giving feedback automatically to both us and the client. That cuts down the backwards and forwards that waste so much time.*



Aaron Patrick
Head of Accounts, Boffix

From software to systems that think

The way businesses run is entering a new era.

Recording

1980 – 2010
Desktop data entry

Reporting

2010 – 2025
Cloud & analytics

Acting

2025 +
Connected, intelligent systems

- Era 1 & 2: Humans did the work, software helped.
- Era 3: Intelligent systems do the work, humans instruct and oversee.

This is not incremental productivity – it is a shift in how we run businesses.

QuickBooks brings together a connected team of intelligent agents made possible by GenOS, our proprietary intelligence architecture.

GenOS connects data, learning and action through a unified system that helps you check for accuracy and completeness at every step, ensuring that QuickBooks intelligence is powerful and always learning.

Intuit's global intelligence at work:

730 million

AI-driven customer interactions
each year

60 petabytes

of financial intelligence

65 billion

machine learning predictions
per day

25 million

natural-language conversations
per year

While others talk about what AI could do. We're showing what it already does.

These systems operate securely on aggregated, anonymised data gathered responsibly through decades of trusted customer relationships – **allowing QuickBooks to learn safely and improve continually.** To replicate this level architecture and datasets would mean many would need to rebuild from the ground up.

Intuit QuickBooks Agents are not chatbots. They are intelligent teammates, each specialising in a core business function by sharing data and context across the platform. With the Agents at your side, you're not just getting tools - you're getting virtual teammates dedicated to helping your business move forward with confidence.

Intuit's AI agents leverage these event-driven architectures to manage multiple tasks concurrently, helping you ensure high responsiveness and efficient task handling across your various business processes.



Accounting Agent: helps you manage categorisation, reconciliations and anomalies.



Finance Agent: helps you track performance, forecasts cash flow and flags risks.



VAT AI Agent **BETA** : helps you ensure accuracy and compliance before you file.



Customer Agent: helps you prioritise leads, drafts responses and supports sales.



Project Management Agent: helps you automate setup, structure and consistency.



VAT AI Agent
Pre-file check found 2
transactions to review.

AI in QuickBooks isn't about replacing people. It's designed to take on the repetitive, freeing up time to focus on insight, advice and client relationships. When human judgement is required, you remain in control.

The new you

Old identity	New identity
I use accounting software.	I lead with AI.
I manage books.	I manage growth.
I work in the business.	I work on the business.
This is not an upgrade. We are redefining what it means to run a modern business.	

AI and automation where it saves time, humans where it matters most.



The balance between artificial intelligence and human intelligence is huge. Accountants and bookkeepers want speed, but they also want control. QuickBooks has built that balance into the fabric of the system.



Ros Hodgson
Director, BCAMS Limited

Not all intelligence is created equal

Intuit QuickBooks is transforming how businesses run and grow through intelligent connected systems built for real-world work – where AI and human expertise **operate together to get things done, not just generate answers.**

At its simplest:

- Automation gives you reliable hands – helping you complete repeatable work.
- AI gives you sharp eyes – helping you detect patterns, surfacing risks, revealing insight.
- Intelligent agents give you initiative – planning, acting, and coordinating with human guidance and oversight.

Our agents are part of a coordinated system that understands context, shares information across functions and helps you execute tasks across your business while keeping you firmly in control.

Conventional AI

Chatbots that answer questions and need prompting

Automates single steps

Generic models trained on public data

AI layered onto legacy software

Focused on productivity

Disconnected tools

Needs supervision

Intuit QuickBooks Intelligence

A connected system that delivers automated experiences with you firmly in control

Combining automation, AI and Agentic AI that's purpose-built for the critical jobs to be done in your business.

Proprietary intelligence refined from decades of financial data

Built on GenOS, our native intelligence architecture

Focused on accuracy and the jobs that grow your business

One connected ecosystem

Works with you, learns, adapts and improves

- 1 Connected awareness – Agents collaborate across jobs and share data.
- 2 Connected execution – Tasks flow automatically between them.
- 3 Human oversight – You always see what's done and why.

This is intelligence that earns trust because it is designed to work for you, not around you.

- ✓ Your data stays yours.
- ✓ Your business stays secure.
- ✓ Your insights stay private.



Intuit is listening. They do not wait for feedback, they ask for it. They have designed features for both accountants and clients, and you can already see how changes in the platform reflect our input. That gives me confidence that this is only the beginning.

The Intuit platform is not just QuickBooks with extra features, it is a coherent ecosystem. Accountants are often nervous about technology that does not connect and forces duplication. The Intuit platform brings everything together in one place, reducing barriers to entry for small firms and giving them the same tools larger firms have.

I am excited to implement the platform and see how it helps me train my team, serve my clients and run my practice. It gives us a team of AI agents behind us, not to replace us but to work with us. It helps us attract new talent, reduces barriers for small firms, and creates an ecosystem that brings everything together. That combination of automation, human intelligence and one platform is the future of accountancy – and I cannot wait to see it land.



Chloe Britnell


Partner, PJCO Chartered Certified Accountants


Why it matters

Time saved through automation and intelligent workflows becomes time reinvested into growth and innovation:

 **Advisory services** – forecasting, scenario planning, performance insight

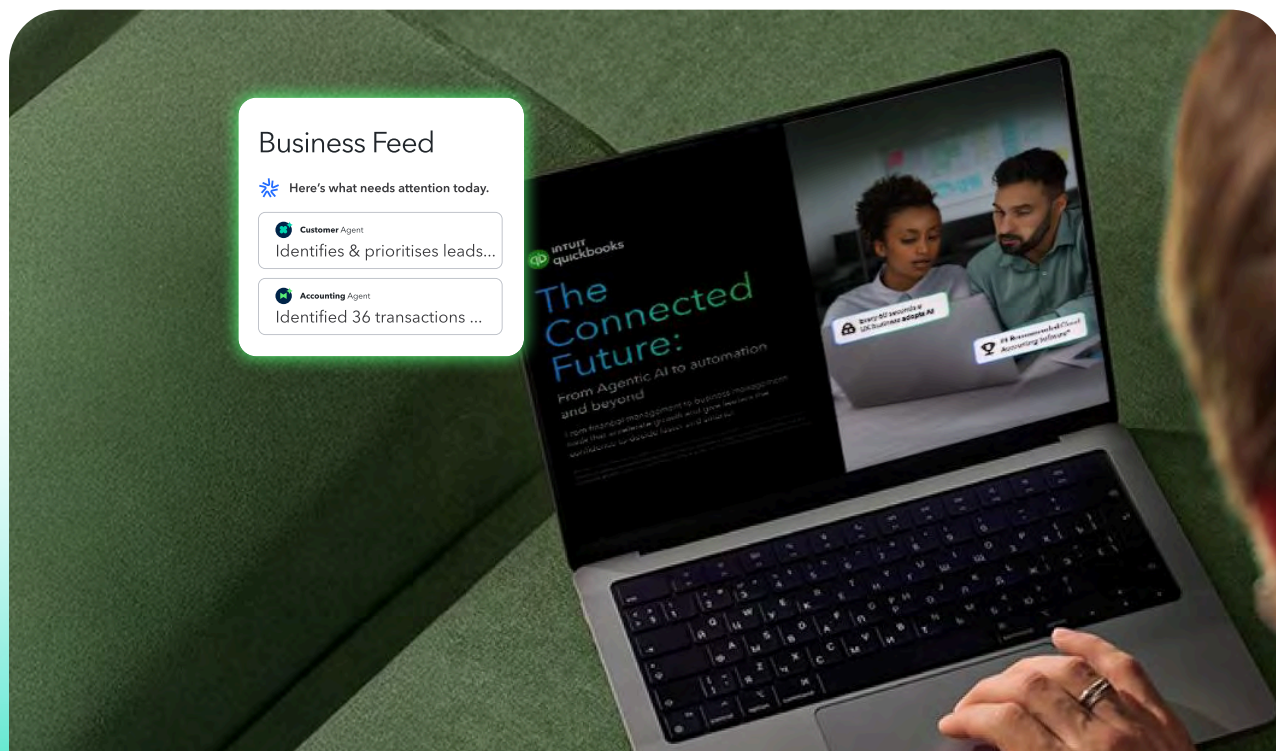
 **Client relationships** – proactive advice and partnership building

 **New offerings** – dashboards, benchmarking and sector reporting

 **Business development** – taking on more clients, expanding markets

 **Team growth** – building skills for higher-value strategic work

Intuit QuickBooks brings the intelligence of the system and the expert judgement of the human together – turning work into progress.



The connected intelligence

At the heart of this new interface is the Business Feed – a consolidated dashboard that orchestrates your AI team and connects all Intuit solutions. The feed shows completed tasks, highlights anomalies for review and flags items requiring human input, transforming daily operations from reactive searching to proactive oversight.

This is the future of running your business: a connected system where humans and AI work side by side. By helping you automating repetition and surfacing intelligent insights, the platform empowers business leaders to shift their focus from manual administration to vision, strategy, and growth.

The Business Feed transforms reactive management into proactive oversight, a fundamental paradigm shift in user experience in financial management.

One platform, many jobs



Switch instantly between accounting, payroll, sales and expenses in a single environment. Data entered once flows everywhere, so client details or transaction changes can update across the whole system automatically.

Business feed



A consolidated dashboard shows what AI agents have helped you complete: from expense categorisation to invoice matching, alongside alerts for items needing attention. Firms start each day with a clear view of what's been done and what matters most.

Smart search



Find everything from customer records to invoices, campaign history, and payment status in one place, with search running across the full platform.

Customisable workspace



Drag-and-drop widgets allow each firm to build their ideal view: sales funnels, cash flow summaries, task lists, or client insights, tailored to daily priorities.

AI agents, human expertise



Agents can help you automate repetitive processes such as data entry, reconciliations, and spend monitoring, surfacing insights when something looks unusual. When professional judgement is required, accountants and bookkeepers remain central - supported by QuickBooks experts and collaboration tools.

The true innovation lies not in any single agent, but in the platform that connects them. Each AI agent is a specialist, yet they share context and learning across the ecosystem, creating a compound intelligence greater than the sum of its parts.

Businesses need more than tools. They need partners that can help them act faster, see further and stay confident in every decision.





Your intelligent teammate

Your smart assistant for cleaner, faster books.

The Accounting Agent helps you save time and sharpen accuracy, so you can trust your numbers and move your business forward.



Hero job	Scenario
Keep books accurate and helps with compliance	A new vendor payment lands in your bank feed. The Accounting Agent suggests a category, notices the amount is higher than usual, and flags it in your Business Feed for review.
Expert review and approval	

Key features:

AI-powered bank feeds:

Can automatically categorises entries with inline, editable fields. It can learn from your corrections to get smarter over time

Anomaly detection:

Can highlights potential errors in reports, explain the cause, and leaves you in control of next steps

Collaboration AI (BETA):

Can help you detect when clarification is needed and enables seamless in-platform messaging between accountants and clients



Benefits:

- ✓ Can help you save time on categorisation
- ✓ Work smarter with real-time collaboration
- ✓ Can improve accuracy with anomaly detection
- ✓ Stay in control - you make the final call

Why it matters

With the Accounting Agent, bookkeeping can become simpler, faster and more reliable. By cutting out repetitive tasks, improving collaboration and flagging risks before they become issues, you can get:

Transactions

Description	Amount	✱ Categorize
Dave's Cafe	-£300	✱ Payment -£300

Accounting Agent

Categorising expenses...

South Farm Rentals	-£1,200	✱ Equipment
Main Street Fuel	-£800	✱ Fuel

Bookkeeper

What was the purpose of this meal?

- More accurate books, day or night
- Time saved on categorisation and follow-up
- Confidence in your financial data
- Freedom to focus on growing your business

Available in Simple Start, Essentials, Plus and Advanced

*Disclaimer: Functionality will vary depending on plans. AI Agents (excl. VAT AI Agent): While available in all QuickBooks supported languages, the AI agent's output are currently in English-only. We recommend you review all outputs carefully. Finance Agent: Not available to customers with multi-currency enabled.

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Your strategic analyst

Your finances, simplified and always in sight.

The Finance Agent gives you clear financial summaries on demand, so you can focus less on chasing numbers and more on making them work for you.



Hero job	Scenario
<p>Keep books accurate and helps with compliance</p> <p>Deliver financial clarity</p>	<p>As month-end approaches, the Finance Agent can help you prepare your P&L in advance, highlighting a 10% rise in expenses with commentary on supplier costs.</p>
Expert review and approval	

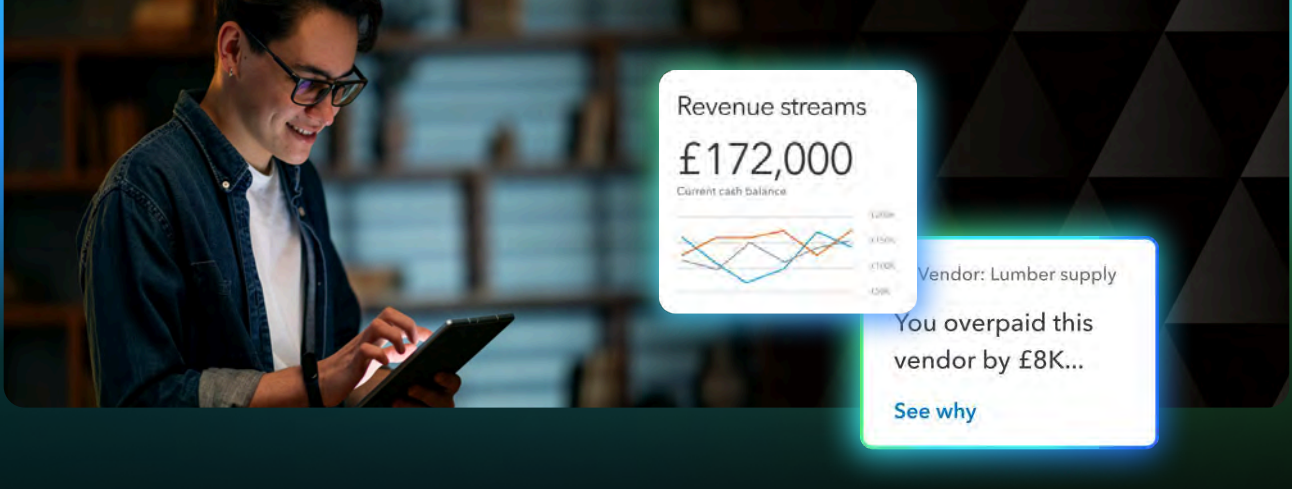
Key features:

Finance summary:

Tailored reports for profit and loss, cash flow and balance sheets. Can help you compare actuals to forecasts to highlight risks and trends

Anomaly detection:

Can flag unusual entries or discrepancies in accounts and budgets, helping you catch issues early



Benefits:

- ✓ Stay on top of performance
- ✓ Spot risks before they escalate
- ✓ Plan with confidence using actuals vs forecasts
- ✓ Drive profitability with smarter decision-making

Why it matters

With the Finance Agent, you don't just see your numbers - you see what they mean for your business. It helps you:



Drive profitability with deeper insight

Get performance clarity, fast

Plan ahead with confidence and control

Reduce surprises through early detection of risks

Available on QuickBooks Advanced only. Not available to customers with multi-currency enabled.

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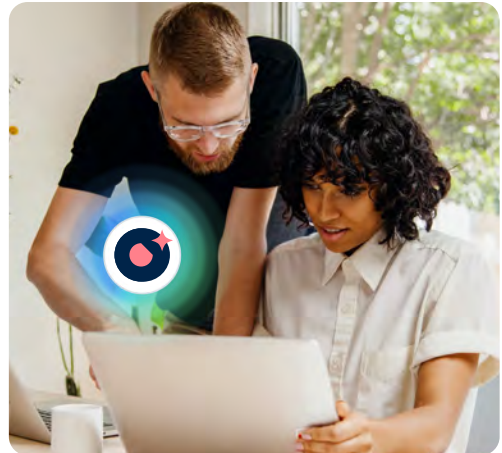
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Your compliance checkpoint

Your smart assistant for tax filing

The VAT AI Agent can help you stay compliant by identifying discrepancies and recommending actions, so you can reduce costly errors.



Hero job	Scenario
Helps keep sales tax returns accurate and compliant	You're prepping your VAT Return when the VAT AI Agent flags that your sales figure doesn't quite match your P&L. The VAT AI Agent helps you run a check, highlights the discrepancy and suggests the correct amount before you file.
Expert review and approval	

Key features:

Pre-file check:

Compares profit and loss statements with VAT liability reports to pinpoint discrepancies.

Detection:

Highlights where income reported on the P&L doesn't align with the net sales amount on the VAT return.

Guided corrections:

Provides clear explanations and recommends actions.



Benefits:



File with confidence by solving issues before submission.





Save time on manual reconciliations by letting the agent surface issues directly.



Reduce compliance risk by catching and explaining errors early.

Why it matters

With the VAT AI Agent (BETA), you can automate the heavy lift of checking your books. It helps you:

Amount	Explanation
 VAT AI Agent Pre-file check found 2 transactions to review.	
£95.10	 A sales VAT code has been used on an expense transaction.

Reduce the risk of filing errors.

Deliver more accurate returns.

Avoid unexpected surprises with actionable steps to resolve issues.

Confidence by filing only after you have reviewed and confirmed.

Available in Simple Start, Essentials, Plus and Advanced only.

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Your automated sales team

Find new leads and respond faster.

The Customer Agent helps you spot, respond to and convert leads faster, so you can grow your business without the busywork.



Hero job	Scenario
Find and respond to leads	An email from a client you last invoiced a year ago is flagged in your Business Feed. The Customer Agent suggests it as a lead and helps you draft a professional re-engagement email for your review.
Expert review and approval	

Key features:

Lead prioritisation:

Highlights the most promising leads first so you can focus on what converts

Automated email drafts:

Generates personalised replies you can send instantly

Estimate creation:

Auto-fills draft estimates to save time and reduce errors



Summary

Reviews
32

Avg. rating
4.5 ★★★★★

🌟 Your customers are saying...
So impressed with your service

Benefits:

✓ Save time with automated lead capture and responses

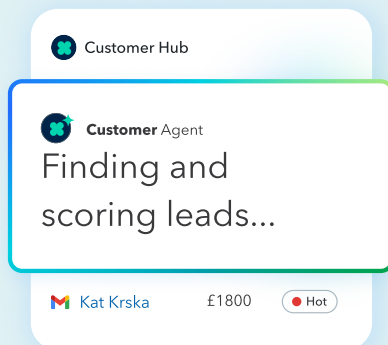
✓ Focus on the right leads instead of chasing dead ends

✓ Respond with confidence and consistency

✓ Close deals faster

Why it matters

Customer Agent helps you ensure no opportunity slips through the cracks. By automatically surfacing leads, helping you prioritise them, and drafting the right responses, it allows you to:



Convert more of the right leads

Save time on repetitive sales admin

Reduce errors in estimates and responses

Keep your sales cycle moving smoothly

Available in Plus and Advanced only

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Your operational manager

Start projects faster with less manual work.

The Project Management Agent helps you launch projects quickly and reliably, freeing you to focus on what really matters - delivering outcomes.



Hero job	Scenario
Get projects started right	You upload a signed statement of work. The Project Management Agent reads the dates and deliverables, then helps you create a draft project plan with milestones for you to check.
Expert review and approval	

Key features:

Project setup automation:

Can automatically draft projects with project name, customer info, dates, and custom fields

Faster onboarding:

Helps you cut the time needed to set up new projects

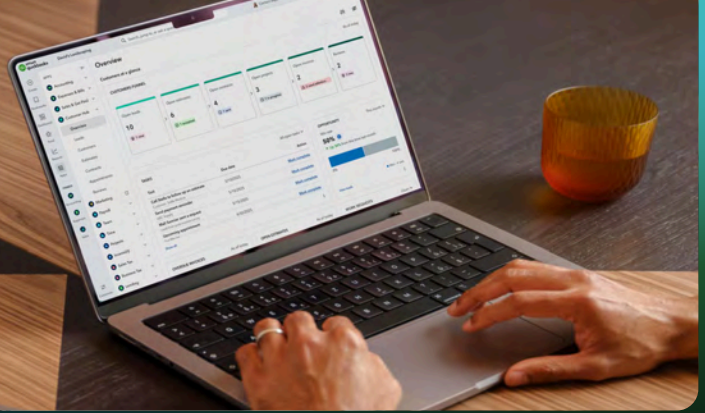
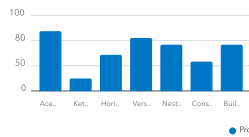
Efficiency built in:

Helps you ensure projects start with the right structure

Project progress

Total active projects

12



Benefits:



Save time on setup



Reduce errors and confusion



Keep projects consistent from day one



Focus on delivering results instead of admin

Why it matters

Getting projects started shouldn't slow down progress. The Project Management Agent removes repetitive setup work, giving you:



Project Management

Project

Landscaping redesign

Ali Preston

Status

Ready



Project Management Agent

New project ready to start

Lawn reseedling

Kat Krska

In progress

Faster starts with less effort

Pre-filled accuracy in every project

More time spent on results, not admin

Confidence that every project begins the right way

Available Advanced only

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From software to systems that think

The connected platform redefining
how businesses run

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