INTUIT
Accountant Suite

Consolidating your realms into Intuit Accountant Suite

This how-to guide is designed to help accounting firms complete realm consolidation from QuickBooks Online Accountant to Intuit Accountant Suite as well as manage the organizational change and adoption across staff and clients.

Introduction

Realm consolidation refers to restructuring multiple QuickBooks Online Accountant realms into one unified environment in Intuit Accountant Suite. Firms often accumulate multiple realms over time, leading to inefficiency and fragmented staff and client management. Consolidating realms improves visibility, simplifies administration, and provides a foundation for growth.

We'll walk you through key terminology to know, things to consider before you start realm consolidation, choosing your target realm, and finally we'll give you a process checklist to wrap it all up.

Key terminology

QBO	QuickBooks Online is a cloud-based accounting software accessed via the internet.
QBOA	QuickBooks Online Accountant is a cloud-based portal that allows accountants to access client's QuickBooks Online accounts in one location.
Realm	An alternative term for a QuickBooks Online Accountant or Intuit Accountant Suite account.
Source Realm	The realms which QBOs are moved out of.
Target Realm	The realm chosen to be the main realm where the QBOs will be moved to.
PAPP	ProAdvisor Preferred Pricing is the pricing available only to ProAdvisors.
Third Party Billing	The QBO's billing subscription is being paid for by another firm,
Third Party Apps	Referring to Apps connected into the QuickBooks Online account.

Things to consider before you start

1. Today the transfer is for QuickBooks Online Accountant to Intuit Accountant Suite.
2. Firm Books and Rev Share cannot be transferred to a different realm.
3. Client-connected apps transfer seamlessly.
4. Firm users will need to reconnect accountant-connected apps.
5. We recommend that you do **not** move Intuit ProConnect tax clients to a different realm.
   - You should not move clients with an open ProConnect Tax Online return to another realm.

   Note: Tax documents and history cannot be moved.
6. If a client is on both the source and the target realms, the realm that has the billing relationship needs to remain.
   - Therefore, if the target realm has the client file with the billing relationship, do not transfer that client from the source realm.
   - Alternatively, if the source realm has the client file with the billing relationship, then delete it from the target realm prior to moving it from the source realm.
7. If a client file is PAPP Firm billed and transferred to the target realm, it takes up to two billing cycles to reflect in the system. Pro-rates and credits may appear on both source and target QBOA billings after the transfer.

   Intuit Enterprise Suite will be transferable via the client transfer tool in early 2026.

Choosing your target realm

Before determining the realm to opt in to Intuit Accountant Suite, consider the following best practices to help save time and effort

If you are using "Your Books," have "Rev Share," or use "ProConnect," it is best if they are all in the same realm.

- If any two of the above are in separate realms, we recommend using the in-product Help icon to contact customer support.
- If you have only one of the above, we recommend that the QBOA with that functionality be opted in to Intuit Accountant Suite.
- If you do not have any of the above, then consider opting in to the QBOA with the most client files attached. This will reduce the number of moves required.

Process checklist

Our checklist will help guide you from planning for realm consolidation to communicating with your team.

1 Planning

- Determine your main firm target realm
- Consider the timing of the move given compliance deadlines and holidays.
- Communicate the plan to staff early.

2 Preparing the target realm

- Confirm that you have opted-in to Intuit Accountant Suite: You will see the logo in the top left.
- Confirm firm billing is setup.
- Recreate any user custom roles from source realms.

3 The move

- Become familiar with Intuit Accountant Suite. Learn more: intuit.me/ias.
- Initiate the transfer by logging in to the target realm (Intuit Accountant Suite) as Company Admin or Primary Admin. Navigate to the gear icon, then click transfer client.
- Choose the source realm. **Note:** You must be the primary admin on the source realm.
- Associated users on those clients will be copied to the target realm (if you choose). If any two are in separate realms, we recommend using the in-product Help icon to contact customer support.
- If the user already exists on the target their access to the client will transfer with the client.
- Review the transfer log. If you encounter an error, reach out to customer support for assistance.
- If you have more than one source realm, repeat this process again.
- (Optional) Invite firm users still requiring access to the target realm that were not copied over during the client transfers.

4 Communication

- Inform the staff that the move is complete and the applicable QBO files are now accessible on the target realm.

This guide was intended to give guidance as your firm considers consolidating realms. If you have additional questions, please contact customer support.