

Transform your work with a more powerful QuickBooks

Automation where it counts. Human where it matters. QuickBooks, powered by the Intuit platform, now offers Intuit AI agents that help you save time and keep your client relationships strong. And, we've improved the QuickBooks experience to help 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.

Last updated: July 1, 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.



Learn about AI agents

Under your guidance and control, new AI agents will help you categorize transactions, detect and resolve anomalies, reconcile accounts, and more. Learn how agents can save you time so you can focus on your most valuable work.



Find out how to access these improvements

QuickBooks will now have more powerful features designed to deliver a better experience for everyone. Learn what's included in each plan, 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.

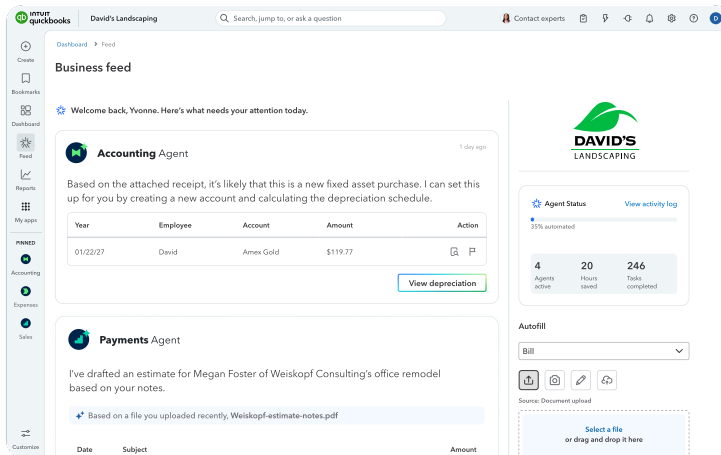


Understand the new connected platform



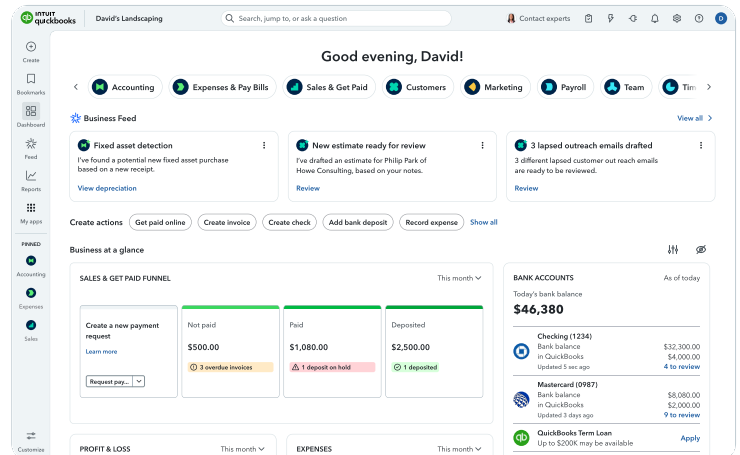
All your work,
all in one place

QuickBooks has been upgraded with more powerful features and Intuit AI agents to help you get more done, but the fundamentals you know and love have not changed. Get the best of automation, insights, and guidance from AI agents focused on the work most essential to running your business. Available any time, all in one place, designed for you to maintain control to review and approve the work that is completed for you.



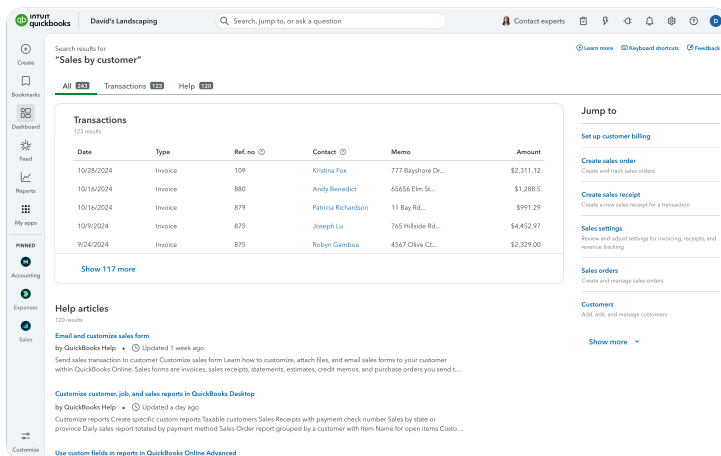
Business feed

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.



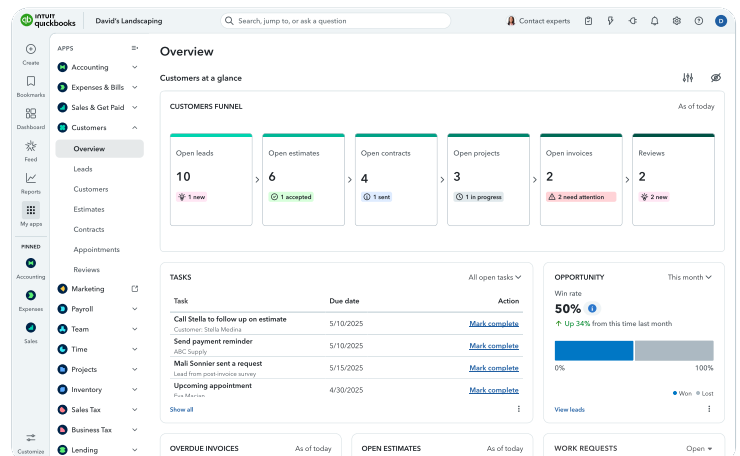
Improved insights and reporting

A customizable performance dashboard comprehensively tracks your clients' financial health and highlights what needs your attention most. Activate Bill Pay Basic (now included in your client's QuickBooks Online plan) to unlock more cash flow data. 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. Organize, 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

qbINTUIT
quickbooks

QuickBooks now has more powerful features and Intuit's AI agents to help you get more done, but the fundamentals you know and love are not changing. Use this page get familiar with the new experience.

1

Create

2

Reports

3

Accounting

4

Search, jump to, or ask a question

Accounting

Expenses & Pay Bills

Sales & Get Paid

Customers

Team

Sales Tax

Business Tax

Business Feed

View all

Fixed asset detection

I've found a potential new fixed asset purchase based on a new receipt.

View depreciation

New estimate ready for review

I've drafted an estimate for Philip Park of Howe Consulting, based on your notes.

Review

3 lapsed outreach emails drafted

3 different lapsed customer out reach emails are ready to be reviewed.

Review

Create actions

Get paid online

Create invoice

Create check

Add bank deposit

Record expense

Show all

Business at a glance

SALES & GET PAID FUNNEL

This month

Create a new payment request

Learn more

Request pay...

Not paid

\$500.00

3 overdue invoices

Paid

\$1,080.00

1 deposit on hold

Deposited

\$2,500.00

1 deposited

BANK ACCOUNTS

As of today

Today's bank balance

\$46,380

Checking (1234)

Bank balance in QuickBooks

\$32,300.00

\$4,000.00

Updated 5 sec ago

4 to review

Mastercard (0987)

Bank balance in QuickBooks

\$8,080.00

\$2,000.00

Updated 3 days ago

9 to review

QuickBooks Term Loan

Up to \$200K may be available

Apply

PROFIT & LOSS

This month

EXPENSES

This month

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

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.

PREVIOUS	NEW
<div><div>Menu</div><div>Features like Accounting and Expenses previously appeared in the menu</div></div>	<div><div>Apps</div><div>Now, Accounting and Expenses are called apps, and appear in the app switcher</div></div>
<div><div>Apps</div><div>3rd-party plugins and tools were previously referred to as apps</div></div>	<div><div>Integrations</div><div>Now, 3rd-party plugins and tools are called integrations, signified by the plug icon</div></div>
<div><div>Dashboard</div><div>There was previously only one dashboard accessible from the main menu</div></div>	<div><div>Dashboard plus overviews</div><div>Now, the central dashboard has been improved with better customization. You can also customize new overview pages in some apps</div></div>

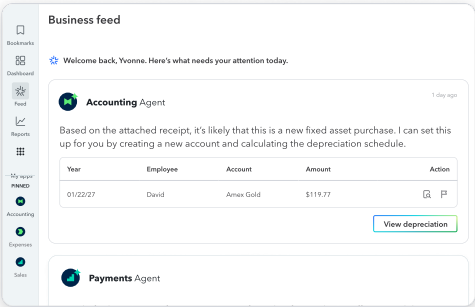
Routine tasks get done twice as fast with Intuit Assist AI compared to manual alternatives, 40% of customers said in a recent survey.¹

1. Based on a survey commissioned by Intuit of QuickBooks Online customers using Intuit Assist as of April 2025.

What are AI agents?

Intuit’s AI agents are your new digital teammates, working behind the scenes to proactively surface key insights, and act on your behalf with your permission. The agents can flag when a handoff is needed to you or your client. Each agent is focused on making a different part of your business run faster and more easily, while you are always in control. They can create content, plan, think, and execute complex business workflows for you.

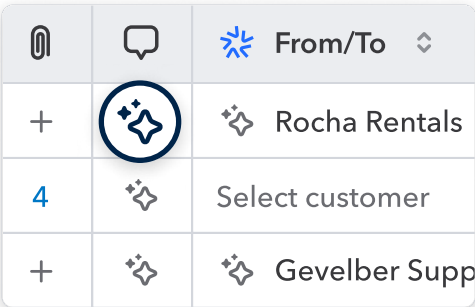
Where do AI agents appear?



Business feed

In the business feed

You can always see the work performed by AI agents—they’ll post their updates in the business feed for your review and approval. Soon, you’ll be able to see the current AI agent status, as well as a past activity log so you have a complete history of all actions your AI agents have taken.



Agents icon

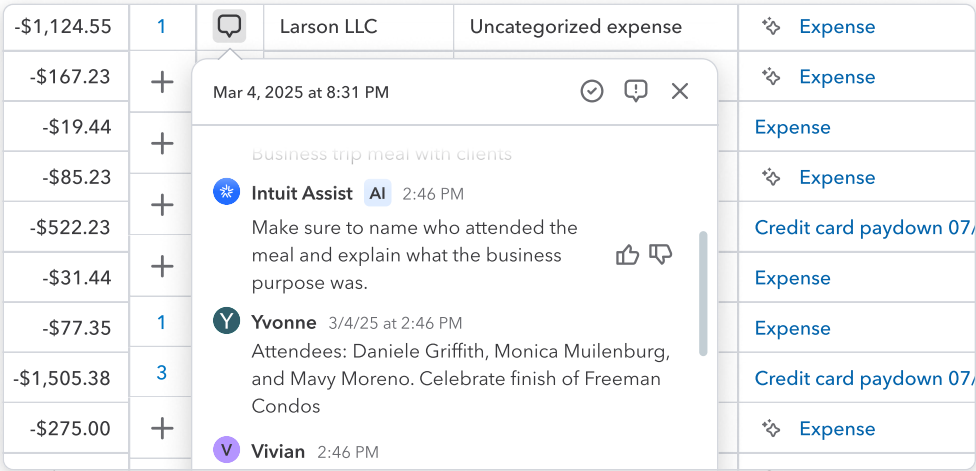
Wherever you see this icon

This icon identifies an AI agent at work. Click the icon to interact with the AI agent and complete a task right there.

How do I interact with AI agents?

Interact with AI agents by chatting in conversational language, like “that was a business meal, since Clancy Passey and I talked about next month’s revenue targets.”

- From the business feed, click the Review button on a task to open a dialog box where you can chat with the AI agent. Review and approve the AI agent’s work, ask questions, and direct the AI agent’s next actions based on the available options.
- Within apps, click the AI agent icon to open the dialog box and begin chatting.

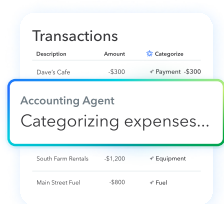


How AI agents can work for you and your clients



Meet your virtual team: Key AI agent functions

Each AI agent has a specific set of jobs, often related to an app in QuickBooks—like Accounting or Expenses. Under your guidance and control, these AI agents will give you, your team, and your clients a smarter way to work. AI agents can also work together to automate complex workflows, and will learn from your interactions to serve you and your clients even better.



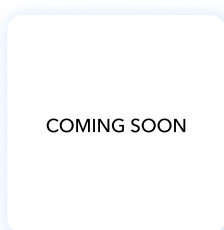
Maximize your time

The **Accounting Agent** can automatically categorize transactions, detect and resolve anomalies, and reconcile accounts. It can also flag what needs your approval or attention so you can stay focused on what's most important.



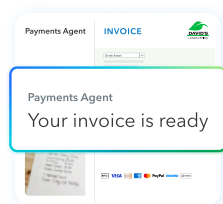
Keep profitability on track

The **Finance Agent** analyzes financial data and automatically creates forecasts, highlights variances, and pinpoints the source—so you can help your clients stay focused on their goals.



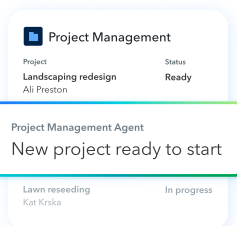
Zero in on the metrics that matter

The **Analytics Agent** identifies and ranks business intelligence insights and recommendations. Ask the Analytics Agent a business question or to dig through the data to deliver on-demand reporting.



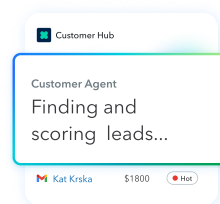
Streamline your clients' cash flow

The **Payments Agent** automatically categorizes expenses and creates polished invoices and estimates from your clients existing data. It even identifies overdue invoices and drafts personalized reminders so your clients can get paid faster without chasing payments.



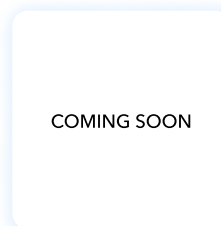
BETA Stay on top of client projects

The **Project Management Agent** streamlines the entire bid-to-profit cycle. By collaborating with Sales and Finance Agents, the Project Management Agent helps you manage projects efficiently while monitoring profitability, tracking deviations, and recommending corrective action for your review.



BETA Help your clients grow

The **Customer Agent** allows your clients to source leads from their inboxes, draft personalized email responses, and track every customer opportunity in the sales cycle so your clients can grow their business efficiently.



Get payroll done for you, your way

The **Payroll Agent** manages payroll tasks proactively by collecting data and running payroll accurately and automatically. It will request confirmation or approval from payroll managers when necessary, so you can rest assured payroll is always done right.



Intuit's AI agents bridge the gap in collaborative client work, helping us speed up the close process without sacrificing accuracy—a dream come true for accountants and business owners.

Jan Haugo-Vuicich
Founder and Owner, Jan Haugo and Associates

How more powerful features work together to help you engage with your clients

qbINTUIT
quickbooks

David's Landscaping

Business Feed BETA

Hi, I'm Intuit Assist, your AI assistant. I use generative AI to help you run your business.

Accounting done

Finalized in QuickBooks

40 transactions auto-posted for you with matches and rules

Show details

View all

Ready to post

Review to finalize

The Accounting Agent handles work for you, shown in the business feed

The work performed by the Accounting Agent appears in the business feed. You can approve the transactions the AI agent is confident about, as well as see more details about any work performed by the agent.

Transactions that need your attention are highlighted for your review

When the Accounting Agent finds transactions that need more information, it creates a review task for you in the business feed. You can open the task, review the transactions, and decide what to do next.

Vivian L

2 transactions need attention

I need your help in adding detail to these two transactions.

Customer	Invoice #	Amount	Status	Action
Zarin Singh	4078	\$8,064.00	12 days overdue	Review
Panelli Rentals	4081	\$2,789.32	3 day overdue	Review

Ask Vivian about this

Review all

Payments Agent

Amount	From/To	Categorize or Match
-\$111.44	Rocha Rentals	Uncategorized expense
\$785.23		
-\$82.23		
-\$31.44		
\$100,000.00		
-\$500.00		
-\$119.99		
-\$117.23		
-\$27.53		
-\$97.66	Sweeney Static	Utilities
\$1,505.38		Meals

Request more info

This looks like supplies. Can you confirm these were office related expenses?

Ask for more info Ask for receipt

View all Add request to list

You can collaborate with your client right in the platform

In this example, these transactions require more information from the client in order to categorize them accurately. An AI agent will help you craft a message to your client and automatically update the transaction categories when you receive a response. Your clients can even respond on the go—right from the QuickBooks mobile app.

How and when to access these improvements

NEW AI AGENTS

Your clients' plans are improved with new AI features that will save time

No matter what QuickBooks plan your clients are currently using, they'll receive new AI features on July 1, 2025. Depending on their plan, this may include powerful new AI agents, with more AI agents available in plans that align to your clients' needs as their businesses grow. Select AI agents are also available for your clients on their QuickBooks Mobile app. Note that some users received early access to the Accounting Agent on June 15, 2025.

Simple Start

Helping early-stage businesses stay organized and compliant from day one. AI agents aren't included in Simple Start.

Includes:

- ✓ AI-driven categorization (this is not an AI agent)
- ✓ Smart invoicing

Essentials

Automate accounting and manage workflows with AI agents to help you get more done.

All Simple Start features, and:

- ✓ Accounting Agent
- ✓ Payments Agent
- ✓ Customer Hub
- ✓ 3 user seats for collaborative access

Plus

Streamline business performance across critical business functions including finance, projects, payments, customer management, and more.

All Essentials features, and:

- ✓ Customer Agent
- ✓ Deeper, AI-powered insights
- ✓ Up to 40 classes / locations

Advanced

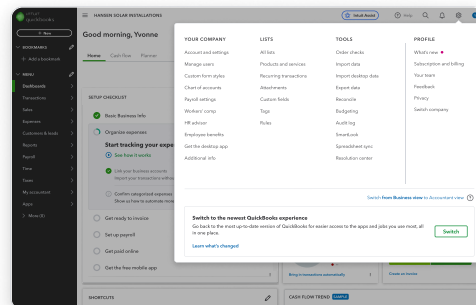
Get business intelligence with AI agents working behind the scenes, plus customizable tools to grow.

All Plus features, and:

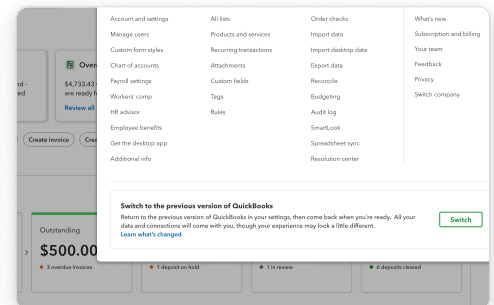
- ✓ Finance, Projects, and Accounting Agents
- ✓ Custom reports
- ✓ Spreadsheet Sync
- ✓ 25 user seats with customizable roles and permissions

THE IMPROVED EXPERIENCE

Opt in to start exploring the connected platform



Opt in



Revert to the previous QuickBooks experience

Opt in to see the improved experience in action

A more powerful QuickBooks includes improved navigation and other features that your clients can opt into, or you can opt in on their behalf. After opting in, you and your clients can begin using the new experience and get familiar with what's new. For a limited time, your clients will be able to switch back to the previous version of QuickBooks, or you can do that for them. However, all users will eventually move over to the new experience and the previous version will no longer be available. We will keep you informed ahead of time so you and your clients can be prepared to upgrade to a more powerful QuickBooks.

In this toolkit, we're giving accountants an early look at the features and functionality of a more powerful QuickBooks in order to set you, your team, and your clients up for success. On July 1, 2025, the new experience and AI agents will go live for everyone. Note that some users received early access to the Accounting Agent on June 15, 2025.

We encourage you to explore the new benefits, features, and power of QuickBooks as soon as you have the ability—so you can feel comfortable using it and guiding your clients.

What's changed? What's hasn't changed?

QuickBooks has been upgraded with more powerful features and Intuit AI agents to help you get more done, but the fundamentals you know and love haven't changed.

What's changed

- New Intuit AI agents
- New streamlined navigation
 - Improved consolidated search
 - Improved business feed
- Customer Hub CRM functionality
- Updated customizable reports
- Bill Pay Basic is included in your client's plan
- New full-screen mode for more room to work

What hasn't changed

- 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.
- Clients must submit an application to activate Bill Pay Basic. And, you can choose to transfer the billing for the Bill Pay subscription and transaction fees to your clients.

When is the new experience available?

✓ June 15, 2025

Some users received early access to the Accounting Agent.

✓ July 1-31, 2025

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

✓ August 1-31, 2025

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

You can choose to temporarily revert to the previous version of QuickBooks. This option will remain available until the end of September.

✓ September 1-30, 2025

By the end of September, all accounts that opted out will be moved to the new platform. You'll be notified before this happens.

Starting in October, the previous version of QuickBooks will no longer be available.

Can I still use the previous version of QuickBooks Online?

Yes, through the end of September 2025, accountants may temporarily opt out current QuickBooks Online clients from the new experience. While the previous version will remain available for now, it will no longer be supported starting in October. 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?

Every QuickBooks customer, including QuickBooks mobile app users, will get access some basic AI functionality (note that Simple Start does not include AI agents). Some users received early access to the Accounting Agent on June 15, 2025. Higher-tier plans will get more powerful capabilities and AI agents. [See what's included in each plan here.](#)

To access the new connected platform experience on July 1, 2025, your clients will manually opt in. By the end of September 2025, all of your clients will automatically be upgraded to the new platform experience.

Want to learn more?

Sign up for the In The Know Webinar demoing the new connected platform and AI Agents on July 17th at 11am PT.

[Sign up today](#)




Help your clients get familiar with the new, more powerful QuickBooks

Provide these resources to your clients to help them learn how they can use Intuit's AI agents and the new experience to save time and improve productivity.

HELPFUL RESOURCES

AI agents




Show your clients how a new team of Intuit's AI agents and trusted experts can help transform work.

-  [All about the new QuickBooks](#)
-  Coming this summer - Introducing AI agents
-  Coming this summer - Dispelling misconceptions about AI

HELPFUL RESOURCES

The new experience

Let your clients walk through the new experience and explore what it can do for their businesses.

-  Coming this summer - Take a guided tour of the new QuickBooks
-  Coming this summer - See the difference the new experience makes with before and after screenshots
-  Coming this summer - Drive leads and close more deals with the new Customer Hub

Stay up to date with the new QuickBooks

Your clients can keep track of all the changes happening across the more powerful QuickBooks on our website for current customers.

[Visit website](#)