

ProAdvisor

IN THE

KNOW

Jaclyn Anku

Leader of ProAdvisor
Training & Certification





Agenda

- ProAdvisor community news
- Product innovations
 - QBOA firms in the Business Network
 - Bill payment release approvals
 - Check images as proof of payment
 - BONUS! Instant Payment
- What's around the corner

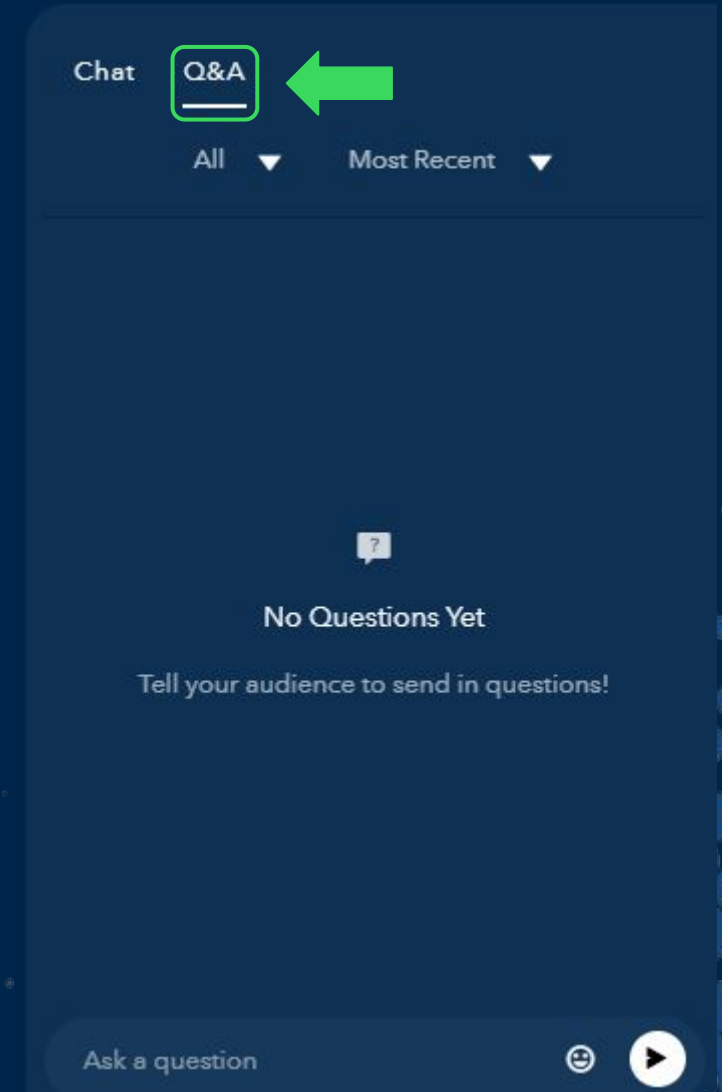
Questions & feedback

Use the **Q&A** tab top right of the screen to submit questions and feedback.

We will answer as many questions as we can during this session.

Only submit questions related to content featured today. For all other questions, contact Support on 888-333-3451.

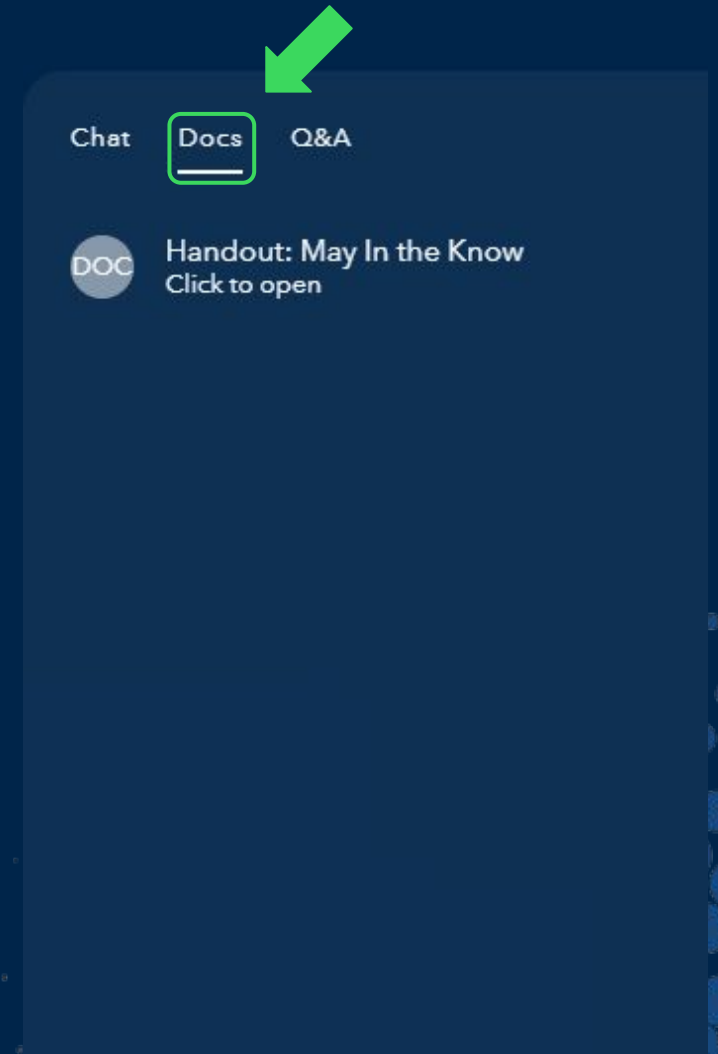
Chat is not enabled for audience members.



Supporting materials

Download today's **handout** in the **Docs** tab, top right of your screen.

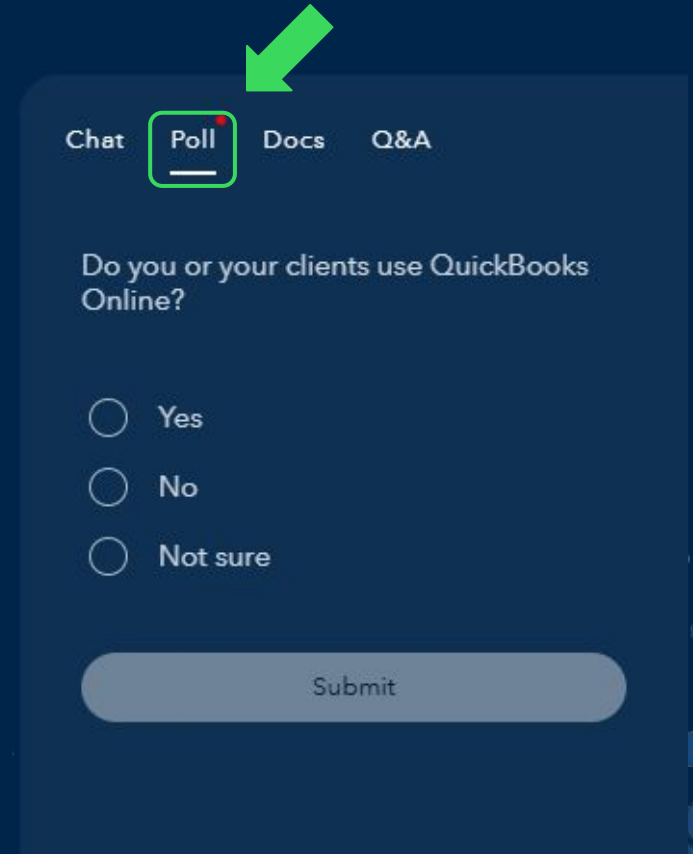
This is a PDF copy of the slide deck for this session.




Polling questions

The **Poll** tab will appear with a red dot top right of the screen when a poll question is launched and ready to be answered.

Select the option(s) you think are correct, and then select the **Submit** button.



The screenshot shows a dark blue interface with three tabs at the top: 'Chat', 'Poll', and 'Docs'. The 'Poll' tab is highlighted with a green box and a green arrow pointing to it. Below the tabs, the poll question 'Do you or your clients use QuickBooks Online?' is displayed. There are three radio button options: 'Yes', 'No', and 'Not sure'. At the bottom of the poll form is a 'Submit' button.

 Vote for Polls

Visit the Polls tab to view live results.

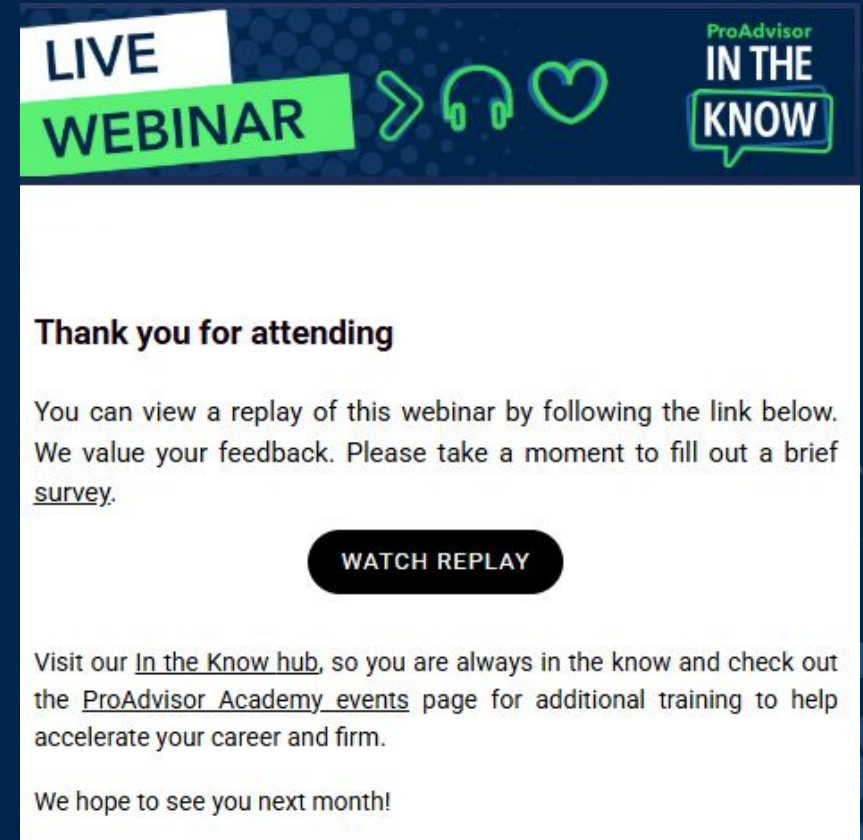
CLOSE [GO TO POLLS TAB](#)

Session recording

A recording of today's webinar will be sent to all registrants **within 1 business day**.

The recordings will be available **for one year** via your attendee link.

CPE is not issued for on-demand recordings.



LIVE WEBINAR > 🎧 ❤️ ProAdvisor **IN THE KNOW**

Thank you for attending

You can view a replay of this webinar by following the link below. We value your feedback. Please take a moment to fill out a brief [survey](#).

WATCH REPLAY

Visit our [In the Know hub](#), so you are always in the know and check out the [ProAdvisor Academy events](#) page for additional training to help accelerate your career and firm.

We hope to see you next month!

About CPE



Earn your CPE

Be present for a minimum of 50 minutes for 1 CPE credit

Answer at least 1 poll question per 50 minutes of learning (so at least 1)

The session doesn't support partial credits



Receive your CPE

If you meet the requirements, you will receive your CPE within 1 business day

CPE credits earned will appear under the My History tab in ProAdvisor Academy

In addition, CPE will also be emailed to you from accountant_training@intuit.com

ProAdvisor community news

Bulletin title - What is this announcement?

Details about announcement.

- When will it be available?
- What can our audience expect?
- Call to action?

Image or additional details.

You could be the **2026 ProAdvisor of the Year**, like **Susan Cook** of Mashpee, Massachusetts, was in 2025.

Insightful Accountant®

Now Accepting Nominations and Applications for the 2026 Top Advisor Awards: the **Top 100 U.S. ProAdvisors**, the **Top 25 Up-n-coming ProAdvisors**, the **Top 50 International ProAdvisors**, and the **Top 25 Tax Advisors**.

To nominate your favorite Advisor or apply for these awards, click this link to the [2026 Awards Portal](#).



Intuit, QuickBooks, and the **QuickBooks ProAdvisor Program** have sponsored the awards in an advisory capacity every year since their inception.

A more powerful QuickBooks for you and your clients

With the launch of our customizable interface, we're combining even more. QuickBooks business tools and third-party apps to work seamlessly together. We're making it easier to do the most critical jobs -- all in one place -- including customer management, accounting, expenses, payments, and payroll. Data flows between tools, enabling intelligent insights.

As you may know, you can now opt your clients in or out of this new QuickBooks Online experience. You can opt in/out your clients in bulk by selecting **Settings** ⚙️ and then **Choose client version**.

Please note that any clients opted out will be moved to the new experience on October 1, 2025, when the classic QuickBooks look and feel becomes unavailable.

[Learn More](#)

The screenshot displays the QuickBooks Accountant interface. On the left is a sidebar with navigation options: 'YOUR PRACTICE' (Clients, Work, Team, ProAdvisor, Apps), 'BOOKMARKS', and 'YOUR BOOKS' (Overview, Dashboard, Tasks, Transactions, Expenses, Invoicing, Projects, Workflows, Payroll, Time, Reports, Taxes, Mileage). The main area shows the 'Zimmer Accounting' client list for 'Alex's clients'. It includes tabs for 'Client list' and 'Client invitations', and filters for 'Recently viewed', 'Favorites', and 'All'. A table lists clients with columns for 'Client' and 'Team'. To the right, a 'Choose version' dialog box is open, asking to 'Choose which version of QuickBooks your clients use'. It offers two options: 'Switch to the latest version' (with a 'Switch all clients' button) and 'Continue using the previous version of QuickBooks for now' (with a 'Continue using previous version' button).

Client	Team
Arlana's Art Supplies	JS
Boston Bakery	JS
SolarWave	JS
XYZ Construction Group	JS
S.W. Capital	JS
Red Paint Decorating	JS
Pluto Capital Group	JS
Spartacus Fitness	JS
Mina's Cupcakes	JS

Intuit Enterprise Suite | CPE-Eligible Features Lab

Join us for 'Features Lab' - a focused, interactive sessions that gives you deep dive into Intuit Enterprise Suite AI Agents. Engage directly with the product team, ask questions, and explore features demonstrated in real-time.

Features Lab: Leverage AI Agents to Boost Productivity

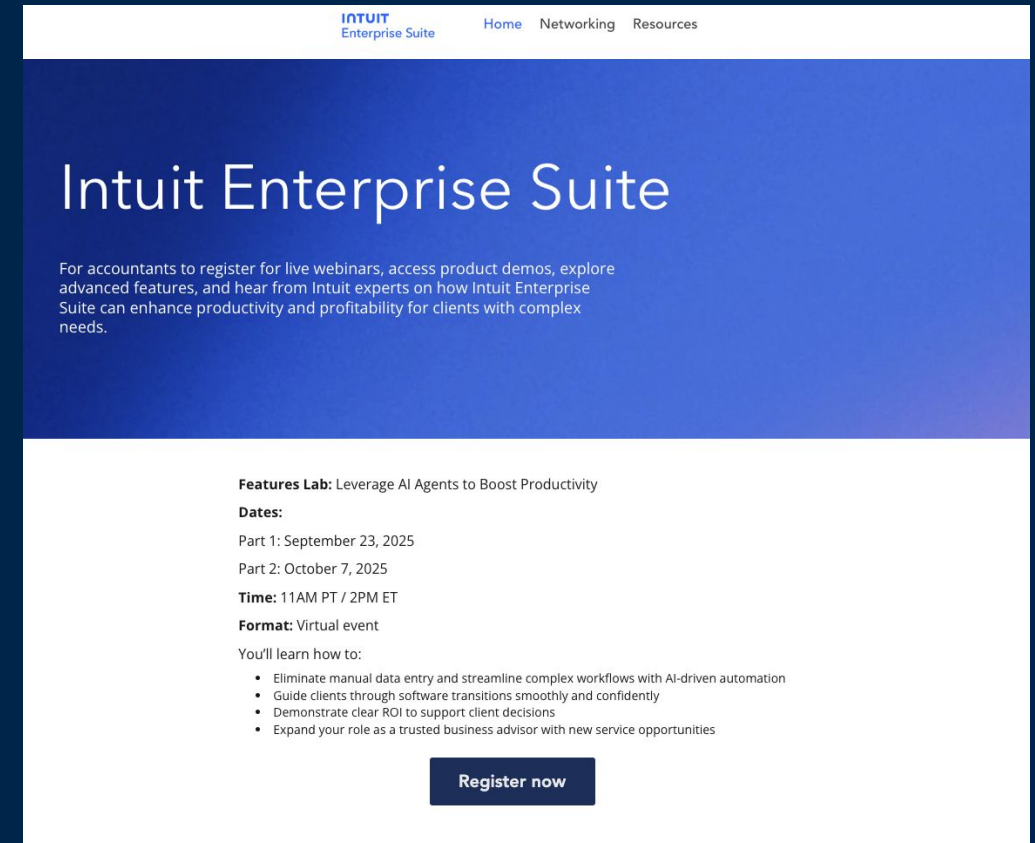
Date: Tuesday, September 23, 2025 and October 7, 2025

Time: 11AM PT / 2PM ET

You'll learn how to:

- Eliminate manual data entry and streamline complex workflows with AI-driven automation
- Guide clients through software transitions smoothly and confidently
- Demonstrate clear ROI to support client decisions
- Expand your role as a trusted business advisor with new service opportunities

Register Today



The screenshot shows the Intuit Enterprise Suite website. The header includes the Intuit logo and navigation links for Home, Networking, and Resources. The main heading is "Intuit Enterprise Suite". Below it, a paragraph states: "For accountants to register for live webinars, access product demos, explore advanced features, and hear from Intuit experts on how Intuit Enterprise Suite can enhance productivity and profitability for clients with complex needs." The featured event is "Features Lab: Leverage AI Agents to Boost Productivity". The dates are listed as "Part 1: September 23, 2025" and "Part 2: October 7, 2025". The time is "11AM PT / 2PM ET" and the format is "Virtual event". A list of topics to be learned is provided, including eliminating manual data entry, guiding software transitions, demonstrating ROI, and expanding roles. A "Register now" button is located at the bottom right of the event details.

INTUIT
Enterprise Suite

Home Networking Resources

Intuit Enterprise Suite

For accountants to register for live webinars, access product demos, explore advanced features, and hear from Intuit experts on how Intuit Enterprise Suite can enhance productivity and profitability for clients with complex needs.

Features Lab: Leverage AI Agents to Boost Productivity

Dates:
Part 1: September 23, 2025
Part 2: October 7, 2025

Time: 11AM PT / 2PM ET

Format: Virtual event

You'll learn how to:

- Eliminate manual data entry and streamline complex workflows with AI-driven automation
- Guide clients through software transitions smoothly and confidently
- Demonstrate clear ROI to support client decisions
- Expand your role as a trusted business advisor with new service opportunities

[Register now](#)

QuickBooks Payments Self-Paced Course in ProAdvisor Academy

Learn how to use **QuickBooks Payments** to help your clients optimize their cash flow
Brand new 1.5-hour course available in **ProAdvisor Academy**

Topics include:

- Identify customers who would benefit from QuickBooks Payments
- Recognize different forms of payment, when to use them, and their associated rates
- Describe how to issue refunds, deal with declined payments, and manage disputed payments
- Identify which QuickBooks Online reporting features include Payments transactions

Click [here](#) to learn more

1.5 CPE credits

ProAdvisor Solutions Spotlight.

Date: September 25, 2025

Time: 11 AM PDT - 12 PM PDT

Save your spot!

Troubleshooting, Tips and Tricks

Learn directly from Intuit Care Experts about solving complex challenges, optimizing workflows, and unlocking tools you might not even know existed.

During the event, attendees will gain:

- **Advanced Troubleshooting Skills**
- **Learn best practices, shortcuts, and tools** that inspire productivity and expand your understanding of how to get the most from the Intuit platform

Product innovations

QuickBooks Online Accountant Firms in the QuickBooks Business Network

Or Zimmer

Product Manager

Team: QuickBooks Business Network



POLLING QUESTION

Have you engaged with the QuickBooks Business Network?

- 1 This is my first time hearing about it
- 2 I've heard of it, but never used it for my firm or my clients
- 3 I've received a request through a client's account, but haven't sent a request
- 4 I've both sent and received connection requests for my clients

The Business Network just got better with the addition of QBOAs

What we heard

Firms want access to the QuickBooks Business Network through QuickBooks Online Accountant (QBOA) for 2 reasons:

1. To use its full benefits for themselves – from easier vendor invites to faster, more secure payments.
2. To experience it firsthand in order to confidently guide their clients.



What we did

We've **expanded the QuickBooks Business Network to all QBOA firms**, giving you full access to its benefits.

- Connect with other businesses and send & receive invoices and payments
- Gain visibility by making your firm discoverable in the network
- Gain familiarity so you can help your clients and their vendors realize the value of the Business Network

Fast facts

Who

QuickBooks Online Accountant (QBOA) firms,
Primary or Company Admin access required

How

There are multiple ways to access the Business Network:

- Profile setup: Account Settings > Advanced > QuickBooks Business Network > Go to my profile
- Connecting: New > Customers / Vendors
- Asking payment information: Vendors/Bills/New Vendor/New Bill/Vendor card > Ask for payment info
- Converting invoices to bills: Bills > For Review

When

October 2025

Where

US

QUICKBOOKS BUSINESS NETWORK

What are the benefits for accounting firms?

- The QuickBooks Business Network has over 4.5M members in the US who have already provided their business information
- Secure connection between your firm and your customers and vendors
- If your connections make changes, you will automatically get their up-to-date contact information
- AP automation at scale: Bills you receive are ready to review and pay - less manual entry!

Vendor

NEW Instead of filling out this form—Ask for payment info ?

Name and contact

Company name: harvie

Vendor display name *: harvie

QuickBooks Business Network

- Lyn Harvie Realty Corp**
LYN HARVIE REALTY CORPORATION
|.....@bairdwarner.com
CHICAGO, IL, 60610
- Harvie Water Solutions LLC**
HARVIE WATER SOLUTIONS LLC
r.....@harviewater.com
Leesburg, VA, 20177
ACH info provided
- Harvin & Harvin LLP**
w.....@gmail.com
Stuart, FL, 34994
- Harvis, Inc.**
.....@HarvisInc.com
Shickshinny, PA, 186551113

harvie

Address

Street address 1:
Street address 2:
Add lines:
City:
State:
ZIP code:
Country:
Preview address

Save

Vendor

Name and contact

Company name: LYN HARVIE REALTY CORP... Reset

Vendor display name *: Lyn Harvie Realty Corp

Title:
First name:
Middle name:
Last name:
Suffix:
Email: |.....@bairdwarner.com
Phone number: +...9439
In Bill Pay, this email is used to get payments.
Mobile number:
Fax:
Other:
Website: http://www.lynharvie.bairdwarner.
Name to print on checks: Lyn Harvie Realty Corp

Address

Street address 1: .. B..... P.... #...1
Street address 2:
Add lines:
City: CHICAGO
State: IL
ZIP code: 60610
Country: US

Send Lyn Harvie Realty Corp a request for their payment info
Once they accept, you'll be able to pay them with QuickBooks Bill Pay without manually entering their payment info. [Find out more](#)

Give feedback

Save and close

Save and send


Getting Paid through the Business Network

- Set up your network profile to get paid by your customers
- Once connected, you can send invoices to your customers – if they use QuickBooks Bill Pay, they can pay your preferred bank account directly
- No need to share sensitive ACH payment information – details will be hidden for security purposes.
- Your firm's business information will be partially masked and only available to those who you are connected with.

DAVE'S COACHES

My network

ProfileRequests




Amy's Bakery

Hotcake Bake Shop Ltd.

Give feedback

Your ACH payment info NEW

Get paid directly to your bank account when your customers use QuickBooks Bill Pay




Provide ACH payment info to your customers


No processing costs for you when your customers use QuickBooks Bill Pay to pay you.


Set up


Your business contact info

This is what your connections see. Curious how others see your profile? [Preview as a network member](#)


 finance@amysbakery.com

 (212) 456-7890

 3000 Tannery Way, Santa Clara, CA 95054

 www.amysbakery.com

Edit

☒ Allow members to find me in the network 

TIPS & RESOURCES

[Get paid as a payable member in the QuickBooks Business Network](#)

[Pay payable members with QuickBooks Bill Pay](#)

[Learn about the QuickBooks Business Network](#)

Intuit Confidential and Proprietary

QUICKBOOKS BUSINESS NETWORK

Pay Your Vendors through QuickBooks Bill Pay

- Request payment information directly from your vendors – less manual entry for you!
- Once connected, the bills you receive are ready to review and pay – and you can pay directly to their preferred bank account
- No need to deal with the liability and logistics of protecting and maintaining your vendors' payment information


Schedule bill payments

Bank account
QuickBooks Chec... (...2037) [Select account](#)



Vendor
Ma


VENDOR	BILL #	PAYMENT METHOD
Or's network services		ACH payment via the network

Deliver a bank payment (ACH)

ORR Network Services Plus 

This is the contact info they added to the QuickBooks Business Network:

 or_zimmer@intuit.com  6813583771

 2600 MARINE WAY MOUNTAIN VIEW, CA 940431126

You're connected to this vendor in the QuickBooks Business Network. Please verify the information above to confirm you're paying the correct vendor. We'll deliver your payment directly to their preferred bank account.

[Save](#)

Total amount
\$0.01
Total processing fees: \$0.00

OPEN BALANCE	AMOUNT	ACTION
\$0.01	<input type="text" value="\$0.01"/> + Add note v	

[Continue \(1\)](#)



Q&A

Bill Payment Release Approvals

Priyanjolie Roy

Product Marketing Manager

**Team: QuickBooks Bill Pay and
Business Network**



POLLING QUESTION

On average, what is your firm's engagement in the AP process with your clients?

- 1 Full service, including submitting bill payments
- 2 Full service, but we do not submit payments
- 3 Bill entry only
- 4 We do not process AP on behalf of our clients

Stronger controls with payment release approvals

What we heard

You and your clients wanted more control and visibility before the release of funds.

We heard you needed a way to:

- Have your client provide the final sign off for money movement
- Ensure cash is available before paying vendors
- Meet compliance and audit requirements with audit trails



What we did

We've launched **Payment Release Approvals**, complementing existing bill approvals in Bill Pay.

- **Reduce risk and liability** with required approvals and a clear audit trail
- **Safeguard funds** by ensuring only authorized users release payments
- **Customize** approvals and workflows

Fast facts

Who

Customers with Bill Pay Elite or QBO Advanced,
Primary or Company Admin access required

How

Create an approval workflow:

Workflow Automation > Create > Save and turn on

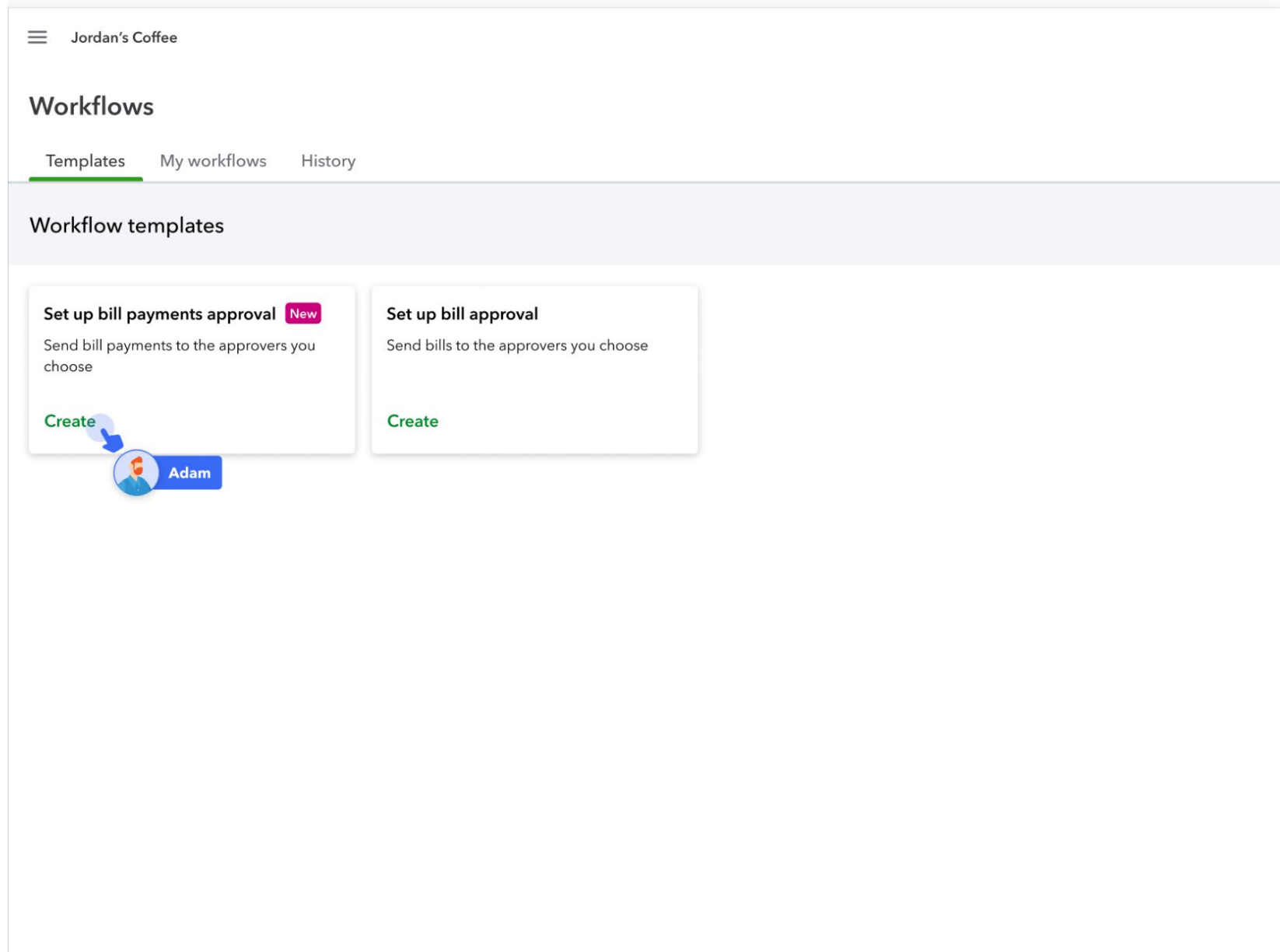
When

Live this week! Rolling out starting September 15

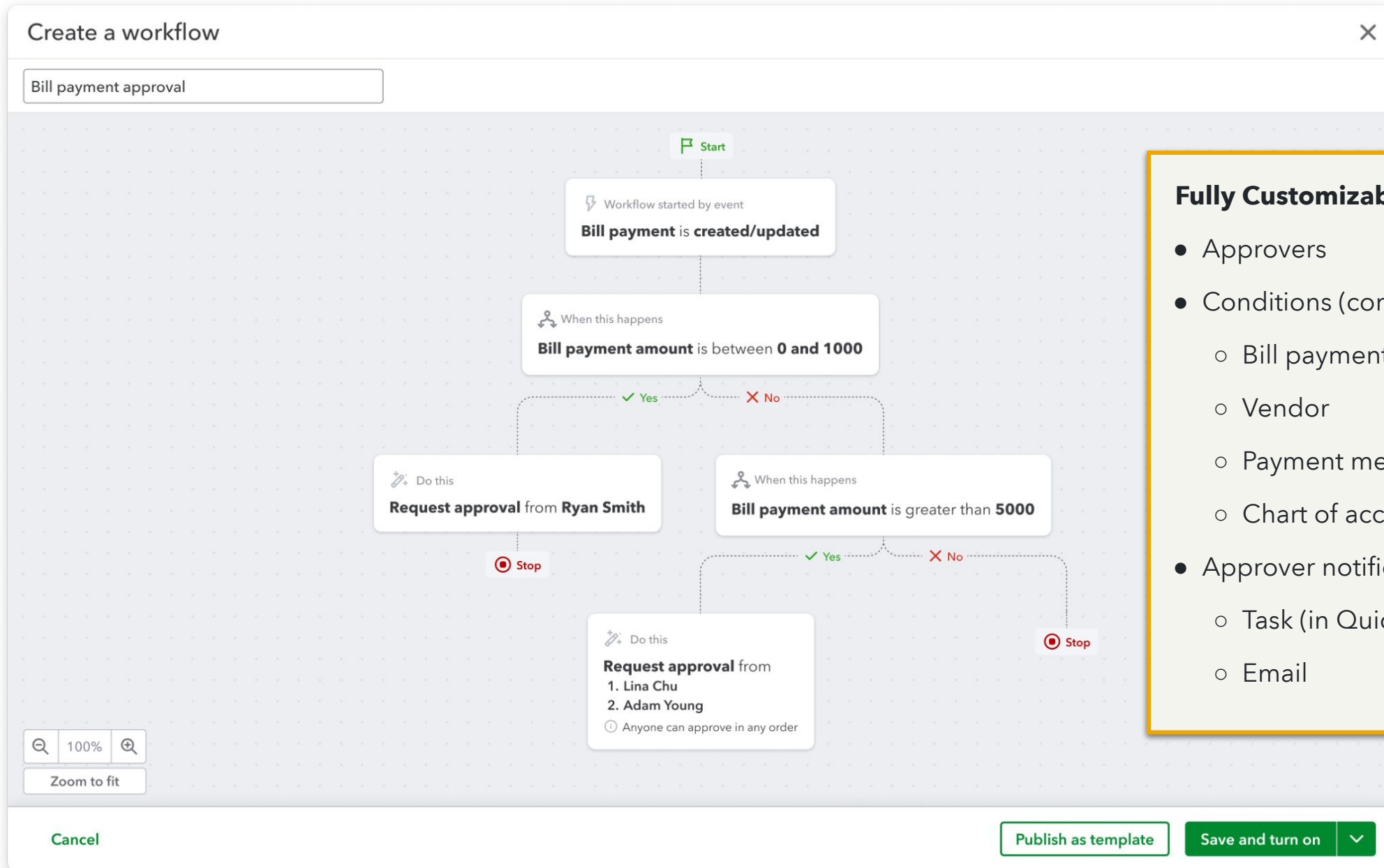
Where

US

How it works | **Setting up a new workflow**



How it works | **Setting up a new workflow**



Fully Customizable Workflows:

- Approvers
- Conditions (common examples below):
 - Bill payment amount
 - Vendor
 - Payment method
 - Chart of accounts
- Approver notification method
 - Task (in QuickBooks)
 - Email

How it works | Submitting a payment for approval

Jordan's Coffee

Search for transactions, contacts, report...

Contact experts

Expenses

Overview

Expenses

Expense claims

Bills

Bill Payments

Vendors

Contractors

Mileage

1099 filings

Bills

Give feedback

Manage settings

Pay bills

Add bill

Create bills and expenses by sending your files to: jordanscoffee+expenses@assist.intuit.com

For review (6)

Unpaid

Paid

Show Bill Pay payments

How to manage bills

3 Bills selected

Total amount: \$5,400.00

Schedule payment

	VENDOR	BILL NO.		BILL AMOUNT	OPEN BALANCE	STATUS		ACTION
<input checked="" type="checkbox"/>	AG gardens	1050	05/10/2025	\$3,000.00	\$10,000.00	Due soon in 10 days	1	Schedule payment
<input checked="" type="checkbox"/>	Barnett Design	1051	05/10/2025	\$1,500.00	\$10,000.00	Due soon in 11 days	1	Schedule payment
<input checked="" type="checkbox"/>	Just Do It LLC	1052	05/10/2025	\$900.00	\$5,000.00	Due soon in 11 days	1	Schedule payment
<input type="checkbox"/>	Speed Clean	2323	07/26/2025	\$1,000.00	\$1,000.00	Due later in 14 days	1	Schedule payment
<input type="checkbox"/>	Speed Clean	2324	08/2/2025	\$1,100.00	\$1,100.00	Due later in 14 days	1	Schedule payment
<input type="checkbox"/>	Amy's Bakery	235670	10/14/2025	\$1,000.00	\$1,000.00	Due later in 14 days	1	Schedule payment

How it works | Submitting a payment for approval

Schedule bill payment

Help

Bill Payment approval policy applied

Some payments may require approval. If there's a delay in the approval, the withdrawal date may change. [More info on approvals](#)

Bank account

Chase checking (...1234) [Change account](#)

Combine multiple bills

Make one payment per vendor ☒

Withdrawal date

8/22/2023 [Apply to all](#)

Total amount

\$25,000.00

Total processing fees: \$1.50

Vendor	Bill #	Payment method	Withdrawal date	Payment speed	Est. delivery date	Due date	Processing	Open balance	Amount	Note	Action
AG gardens		ACH payment Manage	5/5/2025	Stan...	10/5/2025		\$0.50	\$10,000.00	\$10,000.00		
	012345					5/6/2024		\$5,000.00 <small>Pending payments</small>	<div>\$5,000.00</div>		
	678901					5/8/2024		\$5,000.00	<div>\$5,000.00</div>		
Just Do It LLC		Paper check Manage	5/5/2025	Stan...	10/5/2025		\$1.50	\$10,000.00	\$10,000.00		
	234567					5/12/2024		\$5,000.00	<div>\$5,000.00</div>		
	890123					5/14/2024		\$5,000.00	<div>\$5,000.00</div>		
Barnett Design		ACH payment Manage	8/22/2025	Stan...	9/1/2025		\$0.50	\$5,000.00	\$5,000.00		
	456789					8/26/2025		\$5,500.00	<div>\$5,000.00</div>		

Cancel

Continue (2)

How it works | Submitting a payment for approval

Schedule bill payment

Bill Payment approval policy applied

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Bank account

Chase checking (...1234) [Change account](#)

Combine multiple bills

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Withdrawal date

8/22/2023

[Apply to all](#)

Vendor	Bill #	Payment method	Withdrawal date	Payment speed	Est. delivery date	Due date
AG gardens		ACH payment Manage	5/5/2025	Stan...	10/5/2025	
	012345					5/6/2024
	678901					5/8/2024
Just Do It LLC		Paper check Manage	5/5/2025	Stan...	10/5/2025	
	234567					5/12/2024
	890123					5/14/2024
Barnett Design		ACH payment Manage	8/22/2025	Stan...	9/1/2025	
	456789					8/26/2025

Cancel

Bill payments

Review and schedule

Pay from

Chase checking (...1234)

Number of bills

5

Bill payments

3

Processing fee

\$1.50

Payment amount

\$25,000.00

Total payment amount

\$25,000.00



Total processing fees: \$1.50

Payment Authorization


By selecting **Schedule and submit for approval**, I authorize Intuit to withdraw funds from my bank account and deliver this payment according to the details specified. I understand that if the vendor accepts my invite to the QuickBooks Business Network, they may change the payment delivery method for this

Schedule and submit for approval

How it works | Approver notifications



Today's bill payment approval requestsMay 5, 2025, 3:26PM




Intuit Quickbooks

<Quickbooks@intuit.com>

to me

Approve this transaction





INTUIT
quickbooks

Sign in

Today's bill payment
approval requests due by
05/05/2025

You have 2 payments scheduled that need your approval by 05/05/2025. Note that bill payments that aren't approved within 30 days will be automatically rejected and canceled.

View bill payments



Adam

Bill payments

Vendor

Bill no.

Due date

Total

Action

How it works | Approving a payment for release

Jordan's Coffee

Expenses

OverviewExpensesExpense claimsBillsBill paymentsVendorsContractorsMileage1099 filings

Bill payments ⓘ

Pending approval (4) NEW

Payments

\$42,000 (3 bill payments) selected

Approve

Reject

×

<div><div><div></div></div></div>	Vendor	Bill no.	<div><div><div>Adam</div></div>Withdrawal date ⓘ ↓</div>	Approvers	Paid from	Payment method	Payment amount	Ac
<input checked="" type="checkbox"/>	AG gardens	3 Bills	Today	Lina Chu	Chase checking (...1234)	ACH	\$10,000.00	Approve
<input checked="" type="checkbox"/>	Just Do It LLC	123456	05/05/2025 Today	Adam Young	Chase checking (...1234)	ACH	\$10,000.00	Approve
<input checked="" type="checkbox"/>	Barnett Design	6 Bills	04/2/2025	Adam Young	Chase checking (...1234)	ACH	\$5,000.00	<div>Approve ▾</div>
<input type="checkbox"/>	IL Junk Haulers	2 Bills	04/2/2025	Lina Chu	Chase checking (...1234)	Paper check	\$40,000.01	<div>Approve ▾</div>
					Chase checking (...1234)			

Batch Approvals

Single Approvals:

- Approve
- Reject
- View details

How it works | **Approving a payment for release**

View payment

?

 Help

X

Payment pending approval

Your \$10,000.00 payment to AG gardens is scheduled for 05/05/2025, but needs to be approved before the scheduled payment date.

Approve

Reject

Approver

Adam You +3 more

5 bills

Pay to vendor

\$10,000.00

Processing fee (if applicable)

\$0.50

No fees apply to the first 5 ACH payments of your monthly billing cycle.

Pay from

Amy's Bakery
Chase Checking (...5555)

Withdrawal date

i

Today

Deliver to

Barnett Lawn Care
Citibank Checking (...6600)

Estimated delivery date

i

05/01/2023

How it works | Reviewing payment status

Jordan's Coffee

Search for transactions, contacts, report...

Expenses

ExpensesBillsVendorsContractorsMilage1099 filings

Bills

Give feedback

Manage settings

Pay bills

Add bill

Create bills and expenses by sending your files to: jordanscoffee+expenses@assist.intuit.com

For review (6)UnpaidPaid

Show Bill Pay paymentsHow to manage bills

Filters

Bill date: Last 12 months

Print

Export

Settings

<input type="checkbox"/>	VENDOR	BILL NO.	DUE DATE ↓	BILL AMOUNT	OPEN BALANCE	BILL APPROVAL	STATUS		ACTION
<input type="checkbox"/>	AG Gardens	1050	10/22/2024	\$5,000.00	\$5,000.00 Pending payments	Approved	Overdue in 10 days	1	Show payments ▾
<input type="checkbox"/>	AG Gardens	1051	10/22/2024	\$5,000.00	\$5,000.00 Pending payments	Approved	Due today in 11 days	1	Schedule payment ▾
<input type="checkbox"/>	Barnett Design	1052	10/22/2024	\$5,000.00	\$5,000.00 Pending payments	Rejected	Due soon in 11 days	1	View/edit bill ▾
<input type="checkbox"/>	Barnett Design	2323	10/26/2024	\$1,000.00	\$1,000.00		Due later in 14 days	1	Schedule payment ▾
<input type="checkbox"/>	Speed Clean	2324	10/26/2024	\$1,100.00	\$1,100.00		Due later in 14 days	1	Schedule payment ▾
<input type="checkbox"/>	Amy's Bakery	235670	10/26/2024	\$1,000.00	\$1,000.00		Due later in 14 days	1	Schedule payment ▾

Pending payments

This bill has a total of \$5,000 in payments that are pending.

Show payments

Jonathan

How it works | **If an approval is needed urgently...**

View payment

HelpX

Payment pending approval

Your \$10,000.00 payment to AG gardens is scheduled for 05/05/2025, but needs to be approved before the scheduled payment date.

Copy link for approver

Approver

Jonathan

Adam Young +3 more

5 bills

Pay to vendor

\$10,000.00

Processing fee (if applicable)

\$0.50

No fees apply to the first 5 ACH payments of your monthly billing cycle.

Pay from

Amy's Bakery
Chase Checking (...5555)

Withdrawal date

Today

Deliver to

Barnett Lawn Care
Citibank Checking (...6600)

Estimated delivery date

05/01/2023



Q&A

Check Remittance & Faster Payment Options

Idan Cohen

Senior Product Manager

Team: QuickBooks Bill Pay



POLLING QUESTION

What are the top payment methods you or your clients use to pay vendors? (Select up to 3 options)

- 1 ACH payments
- 2 Check
- 3 Credit/debit card
- 4 Wire transfers (incl. international payments)
- 5 Other

POLLING QUESTION

How often do you or your clients verify that a check cleared a vendor's receiving bank?

- 1 Always (every check payment)
- 2 Frequently
- 3 Sometimes
- 4 Only when requested
- 5 Never (or you do not pay by check)

Cleared check images are now available in Bill Pay

What we heard

Accountants and their clients need to confirm and prove when a check payment cleared.

Lack of visibility created friction and trust issues with vendors.



What we did

Customers can now view and download cleared check images directly in QuickBooks Bill Pay, providing **concrete proof of payment** and **building vendor trust**.

Fast facts

Who

All QuickBooks Bill Pay users

How

QBO > Bill Pay Payments > View details >
View check > View or download

When

Fully available as of August 2025

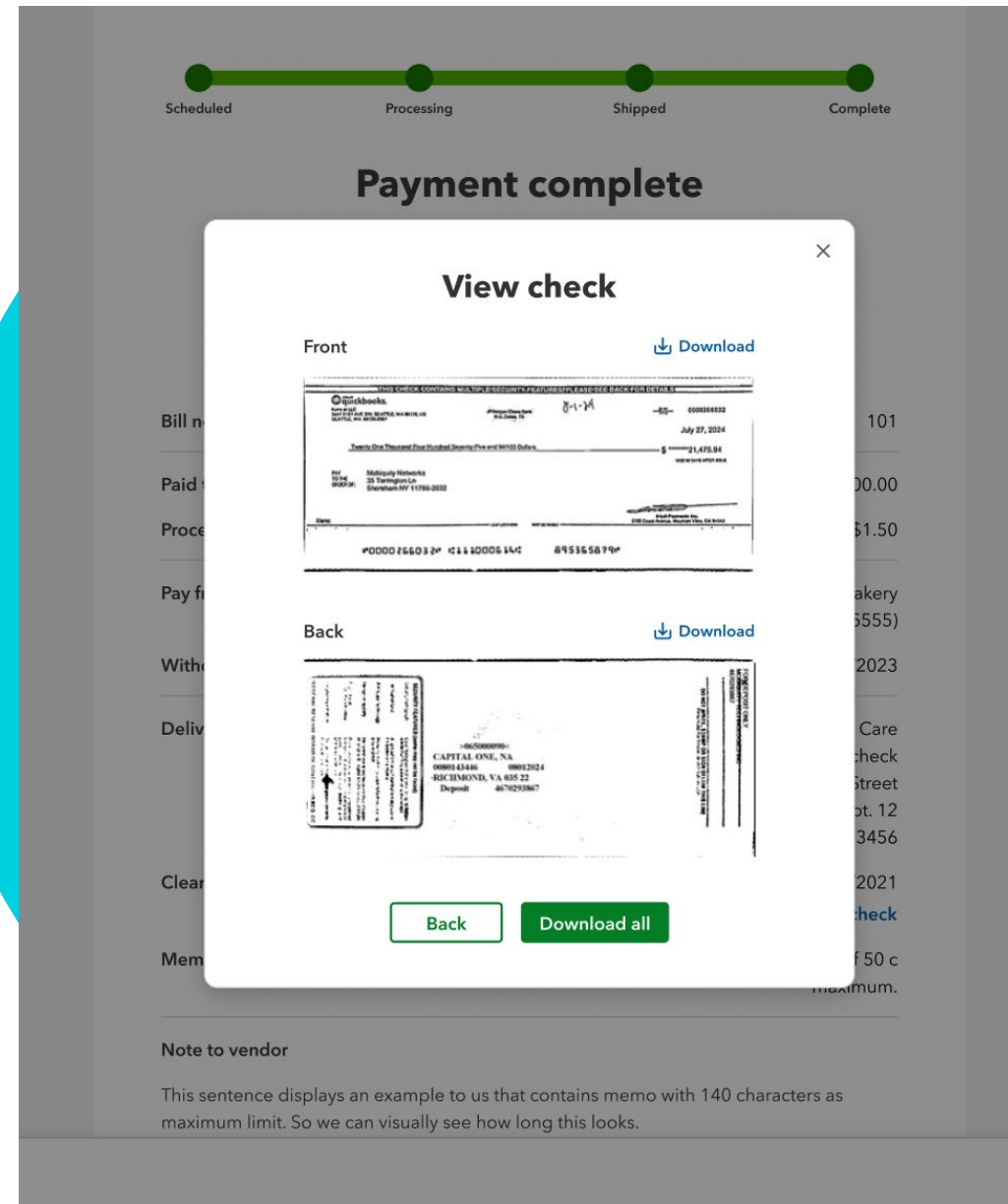
Where

US

CHECK REMITTANCE

Viewing a cleared check

1. Navigate to the [Bill Payments](#) page in Expenses & Bills
2. Click “View details” next to the transaction you’d like to review.
3. Click “View check”.
If the bill payment is marked as “Complete: and the check has cleared, the link will appear under “Clearance date”.
4. The cleared check image will appear. You will have the option to [view or download](#) it.



POLLING QUESTION

How often do you or your clients need to send payments instantly to avoid late fees or cash flow issues?

- 1 Frequently (2+ times per month)
- 2 Occasionally (a few times per quarter)
- 3 Rarely (a few times per year)
- 4 Only when requested
- 5 Never

Create and pay bills in minutes or schedule for later

What we heard

Bill Pay customers want more payment speed choices, with the option to choose based on their cash flow situation or vendor preferences – whether scheduling bills in advance, paying when it's most convenient, or sending funds instantly.



What we did

We're excited to introduce **Instant Payment**, a new option that allows customers to pay bills within minutes on business days until 5:00 p.m. Pacific Time.

With three payment speed options: Standard ACH, Faster ACH, and Instant Payment, you and your clients can better manage cash flow, reduce late fees, and build more vendor trust.

Fast facts

Who

Eligible Bill Pay accounts

How

QBO > Expenses > Bills >
Select bill(s) to pay > select 'Instant' under Payment Speed
in the Schedule bill payment page

When

Rolling out over the next month

You're getting a first look as our valued accountant partners!

Where

US

INSTANT PAYMENT

Scheduling an instant payment

- 1. Navigate to the Bills page and select which bill(s) to pay.
- 2. On the Schedule Bill Payment page, click on "Payment Speed".
- 3. Select the "Instant" option, if available, to pay the bill(s) with the new faster speed.

Processing fees for Instant Payment:

- 1% of payment amount - your ProAdvisor discount of 15% off transaction fees will apply!
- Minimum fee of \$10
- Maximum fee cap of \$100

Schedule bill payment

Help

Bank account

BANK OF AMERICA, ... (...6714) [Select account](#)

Combine multiple bills

Make one payment per vendor ☒

Withdrawal date **NEW**

Earliest

Total amount
\$18,200.00
Total processing fees: \$2.50

VENDOR	BILL #	PAYMENT METHOD	WITHDRAWAL DATE	PAYMENT SPEED	EST. DELIVERY DATE	DUE DATE	PROCESSING FEE	OPEN BALANCE	AMOUNT		ACTION
Red Ocean		Bank payment ...1234 Manage	01/08/2025	Standard	01/13/2025		\$0.50	\$15,000.00	\$15,000.00	+	Add note v
	1051			Standard 01/13/2025 3 business days \$0.50 fee may apply	01/18/2025	--	--	\$5,000.00	\$5,000.00		x
	1052			Faster 01/09/2025 1 business day \$10.00 processing fee	01/19/2025	--	--	\$5,000.00	\$5,000.00		x
	1053			Instant NEW 01/08/2025 Within minutes (if scheduled by 5 PM PT) \$100.00 processing fee	01/25/2025	--	--	\$5,000.00	\$5,000.00		x
AG gardens		Bank payment ...6666 Manage	01/08/2025				\$0.50	\$2,200.00	\$2,200.00	+	Add note v
	235670				01/27/2025	--	--	\$1,100.00	\$1,100.00		x
	235671				01/28/2025	--	--	\$1,100.00	\$1,100.00		x
Poe Paper		Paper check Manage	01/08/2025	8 - 10 business days	01/21/2025		\$1.50	\$1,000.00	\$1,000.00	+	Add note v
	235672				01/27/2025	--	--	\$5,000.00	\$500.00		x
	235673				01/28/2025	--	--	\$5,000.00	\$500.00		x

[Cancel](#)[Continue](#)

INSTANT PAYMENT

Scheduling an instant payment

- 1. Navigate to the Bills page and select which bill(s) to pay.
- 2. On the Schedule Bill Payment page, click on "Payment Speed".
- 3. Select the "Instant" option, if available, to pay the bill(s) with the new faster speed.

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- Minimum fee of \$10
- Maximum fee cap of \$100

multiple bills

payment per vendor

Withdrawal date **NEW**

Earliest

WITHDRAWAL DATE	PAYMENT SPEED	EST. DELIVERY DATE	DUE DATE	PROCESSING FEE	OPEN BALANCE
01/08/2025	<div>Standard </div>	01/13/2025		\$0.50	\$15,000.00
	<div>Standard 01/13/2025 3 business days</div>		01/18/2025	--	\$5,000.00
	<div>Faster 01/09/2025 1 business day</div>		01/19/2025	--	\$5,000.00
	<div>Instant NEW 01/08/2025 Within minutes (if scheduled by 5 PM PT)</div>		01/25/2025	--	\$5,000.00
01/08/2025				\$0.50	\$2,200.00
			01/27/2025	--	\$1,100.00



Q&A

POLLING QUESTION

Are you interested in connecting with a Money Specialist on the Accountant team about our QuickBooks products?
(Select all that apply)

- 1 QuickBooks Bill Pay
- 2 QuickBooks Payments
- 3 No, thank you. I would not like to be contacted.

What's around the corner?

On The Books schedule

Upcoming episodes:

- What to do with your tech stack after a merger?
- An interview with Dan Hood, Editor-in-Chief of Accounting Today

And be sure to check out these recent episodes:

- Chris Williams on the human side of M&A
- Let's talk about private equity....and other growth options

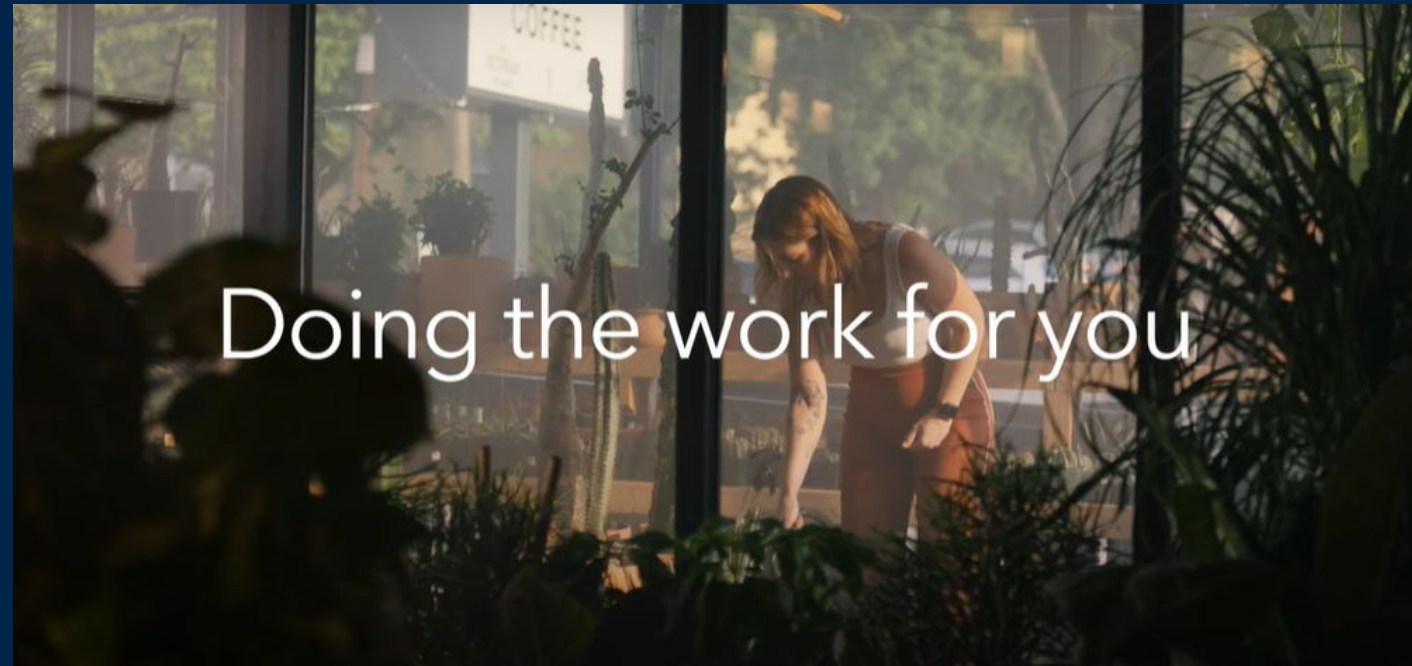
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Automation where it counts. Human when it matters.

This July, transform how you run your business with a new team of Intuit AI agents and trusted experts.

Intuit is introducing a new kind of AI to its platform. Intuit AI agents will complete work for you, handling the day-to-day tasks on your behalf, such as sending invoices, tracking payments, reconciling your books, and helping manage your customer leads. With real-time help and insights and task automation, you can move faster, operate smarter, and unlock new levels of productivity and growth.



[Visit our blog to learn more](#)

QuickBooks Toolkit for Accountants

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.

[Download the toolkit](#)

The screenshot shows the landing page for the QuickBooks Toolkit for Accountants. At the top right is the Intuit QuickBooks logo. Below it, the text reads "QUICKBOOKS ON THE INTUIT PLATFORM TOOLKIT FOR ACCOUNTANTS". The main headline is "Transform your work with a more powerful QuickBooks", where "more powerful" is in a light blue/green color. Below the headline is a paragraph: "Automation where it counts. Human where it matters. QuickBooks, powered by the Intuit platform, will soon offer 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." Below this is a small text: "Last updated: May 21, 2025". The page features four dark grey cards with light green text and right-pointing arrow icons. The cards are: 1. "Understand the new connected platform" with a subtext about essential business tools working together. 2. "Learn about AI agents" with a subtext about AI agents helping with transactions and anomalies. 3. "Find out how to access these improvements" with a subtext about new powerful features designed for a better experience. 4. "Get answers to common questions" with a subtext about answers to help make the experience as productive as possible.

QUICKBOOKS ON THE INTUIT PLATFORM
TOOLKIT FOR ACCOUNTANTS

INTUIT
quickbooks

Transform your work with a more powerful QuickBooks

Automation where it counts. Human where it matters. QuickBooks, powered by the Intuit platform, will soon offer 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: May 21, 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, 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.

>



Join us next month



What's in store for October's In the Know webinar

AGENDA

- Understand Modern Reports in QuickBooks and Intuit Enterprise Suite
- Recognize the newest updates to paycheck corrections
- Identify how to use the custom client ID in QuickBooks Online Accountant

Date: October 16, 2025

Time: 11am Pacific / 2pm Eastern

SPEAKERS



**Subhanan
Sahoo**

Sr Product
Manager
Intuit



**Nitzan
Leibovitch**

Product
Manager
Intuit



**Kaitlyn
Wilchynski**

Sr Product
Manager
Intuit

[Learn more](#)



Thank you!

Important Product Information

*ProAdvisor Preferred Pricing - ProAdvisor Firm Discount

FOR QUICKBOOKS ONLINE ACCOUNTANT CUSTOMERS WHO TAKE ADVANTAGE OF THE FREE QUICKBOOKS ELITE BILL PAY SUBSCRIPTION WITH PROADVISOR PREFERRED PRICING - PROADVISOR DISCOUNT OFFER

Eligibility: This offer is eligible to accounting firms ("QBOA Customer") who register or have registered for QuickBooks Online Accountant ("QBOA") and use the ProAdvisor Discount option ("QBOA Customer") to subscribe to QuickBooks Bill Pay ("Bill Pay") for the QBOA Customer's firm. The ProAdvisor Discount invoicing option means that the QBOA Customer agrees to pay for Bill Pay subscription fees.

Pricing: Eligible QBOA Customers will be entitled to the following discounts for their firm:

- Free subscription to QuickBooks Bill Pay Elite
- Free standard ACH payments
- 15% off the then-current per transaction fee for: (i) Payments by check; and (ii) Faster ACH payments
- Discount and list price subject to change at any time at Intuit's sole discretion. All prices are quoted without sales tax.

Offer Terms: To be eligible, Bill Pay subscriptions must be entered through the ProAdvisor Discount. The discount is valid only for the named individual or company that registered for the Bill Pay subscription and cannot be transferred to another client, individual, or company. Cannot be combined with any other Intuit offer. Offer valid for a limited time only, only in the U.S., and is non-transferable. Terms, conditions, pricing, special features, and service and support options subject to change without notice.

Billing: The QBOA Customer's account will automatically be charged on a monthly basis until the Bill Pay subscription is canceled. The first billing date will be prorated and deferred to the next existing QBOA billing date ("Existing Billing Date"), unless Bill Pay enrollment is on the same date as the Existing Billing Date, in which case the full monthly cost will be charged upon enrollment. To cancel your Bill Pay subscription, go to Account & Settings > Billing & Subscription in QBOA, and select "Cancel" for QuickBooks Bill Pay. Cancellation will become effective at the end of the monthly billing period. You will not receive a pro-rated refund.

**Product information

QuickBooks Bill Pay: Subject to eligibility criteria, credit, and approval prior to first payment. Subscription to QuickBooks Online required. Bill Pay Basic is included with QuickBooks Online when purchased directly from QuickBooks.com or QuickBooks Sales. Not available in U.S. territories or outside the U.S.

QuickBooks Business Network: Use of the QuickBooks Business Network for spam, marketing, or other activities which violate applicable Intuit Terms of Service is strictly prohibited. You may only view and connect with other QuickBooks Business Network members located in your geography. All business information is provided by Business Network members and is not independently verified or endorsed by Intuit. Intuit reserves the right to limit your use of the QuickBooks Business Network, including your ability to connect with other members and be listed in the network per our Terms of Service.

**Features

Roles and permissions and bill approval workflows: Available in QuickBooks Bill Pay Elite or QuickBooks Online Advanced. Not available for QuickBooks Online Simple Start customers.

Standard ACH: Transaction fees apply for ACH payments over the monthly allotted amount included in QuickBooks Bill Pay Basic and Premium plans. Limits may apply on total number and amount of payments.

Faster ACH: Subject to eligibility criteria. Additional processing fee applies. Does not count toward monthly allotted ACH payments. Faster ACH payments are usually delivered within 1 business day. Delivery times may vary due to third party delays or risk reviews.

Two Day ACH Funding: Select Bill Pay Premium and Elite subscribers may have access to two-day funding. Limited availability. Eligibility subject to change.

Instant or Next Day Payment: Subject to eligibility criteria, including delayed eligibility for new users and availability for only some transactions and [financial institutions](#). Additional processing fee applies. Does not count toward monthly allotted ACH payments. Payments sent before 5pm PT on business days are typically delivered in minutes. Payments sent after 5pm PT will be delivered the next business day. Delivery times may vary due to third party delays or risk reviews.

Auto-match transactions: QuickBooks Online will only match bank withdrawals with transactions processed through QuickBooks Bill Pay. Not all transactions are eligible and accuracy of matches is not guaranteed.

**Claims

Reduce manual entry by 57%: Based on U.S. QuickBooks customers who record bills in QuickBooks using automation tools on the Apps/Bills page compared to customers not using these tools, from February 2024 to January 2025.