INTUIT ProAdvisor

IN THE KNOW

INTUIT ProAdvisor

IN THE KNOW

Your host today

Arti Patel Martinez
Principal Program Manager
Team: ProAdvisor Training
Location: San Diego, CA

Agenda

ProAdvisor community news

Product innovations

- Recognize the new embedded services available in QuickBooks
- Identify the latest improvements to Core and Accelerate
- Understand upcoming feature releases to Intuit Accountant Suite

What's around the corner

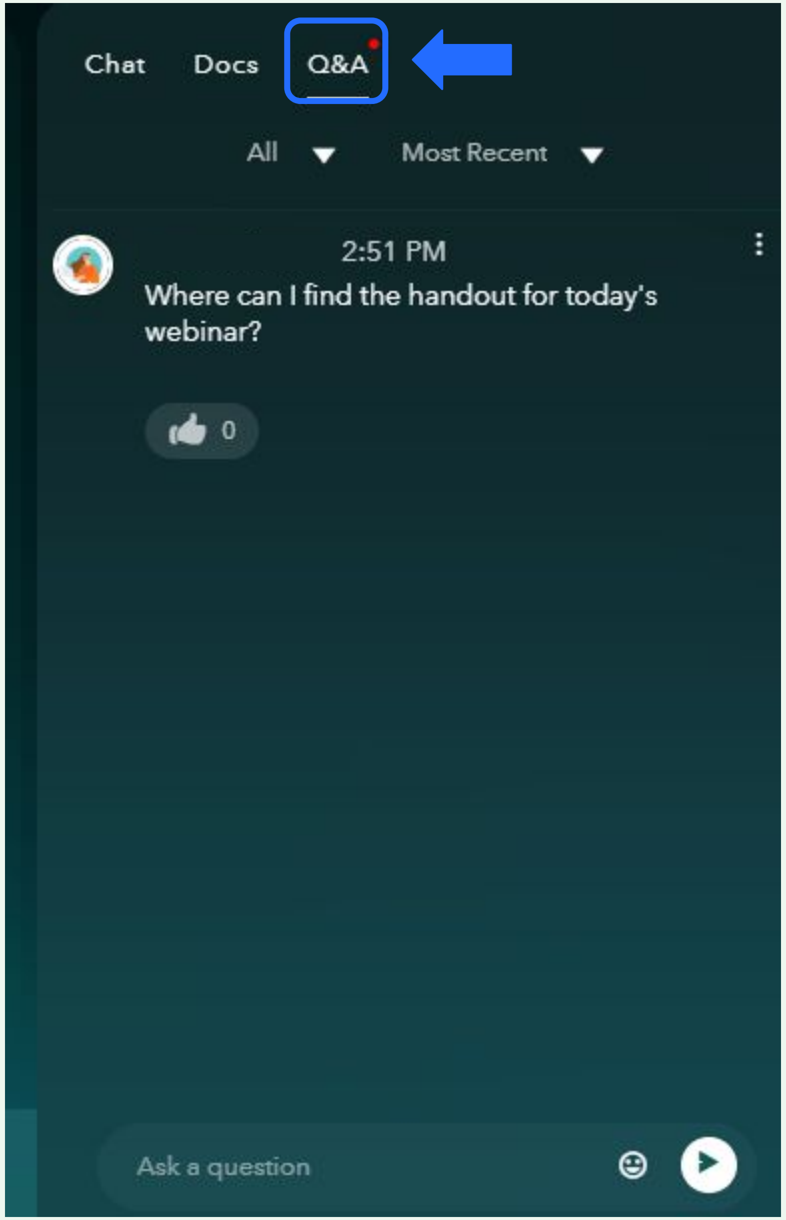
Questions & feedback

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.

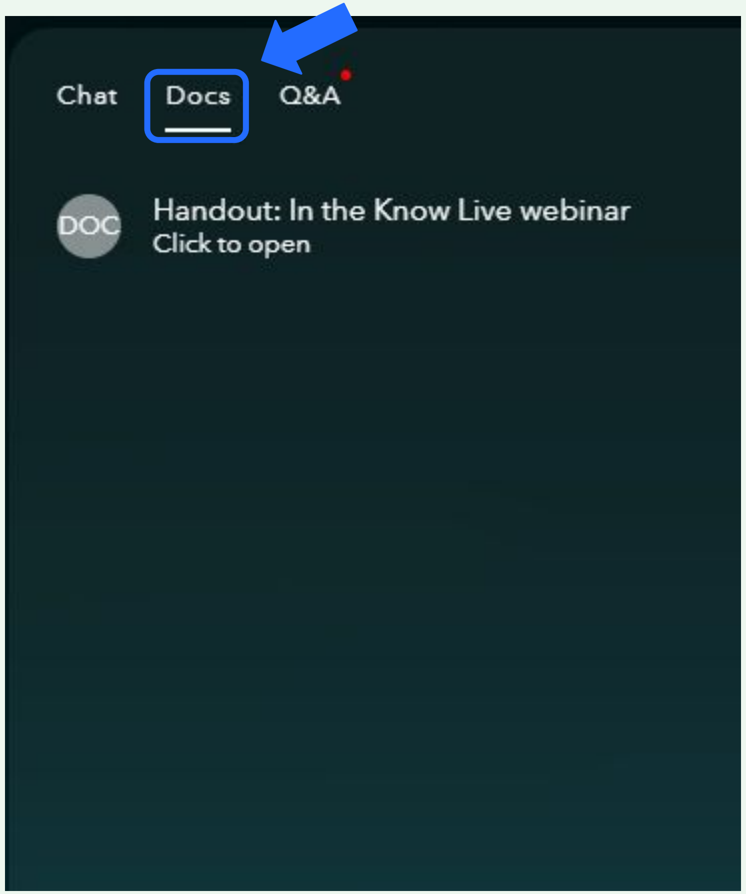
Chat is not enabled for audience members.



Supporting materials

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

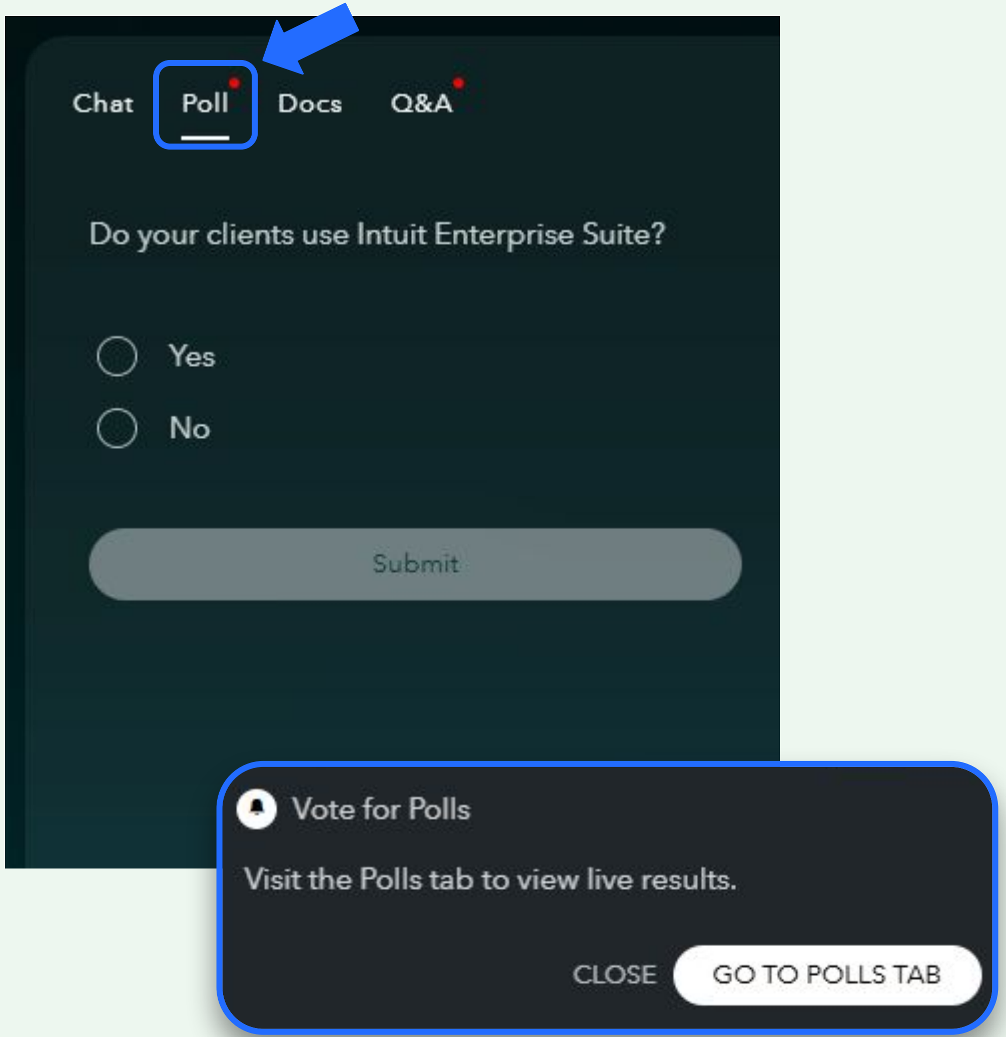
This is a PDF copy of the slide deck for this session.



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.

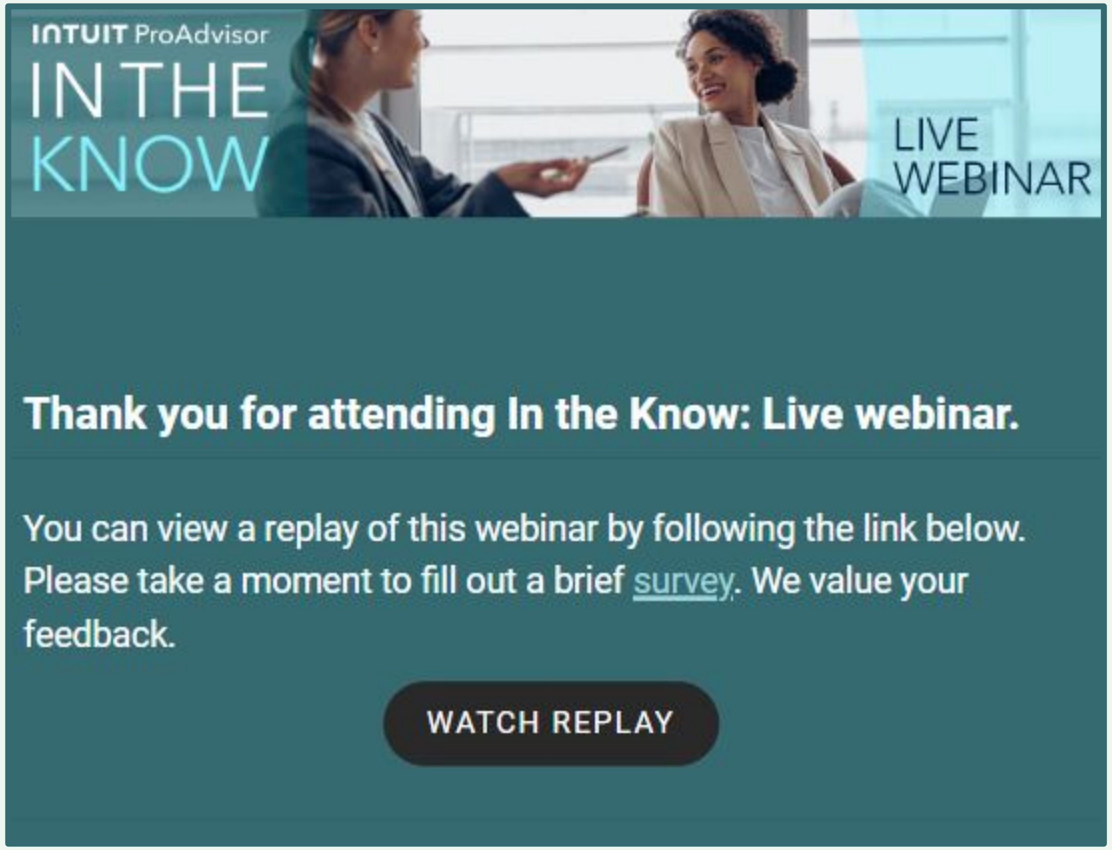


Session recording

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.



In the Know

About CPE

Earn your CPE

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

Answer at least 3 poll question per 50 minutes of learning.

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

Closing the Books Faster on Every Job

Whether you run finance for a construction business or advise one, disconnected spreadsheets and month-late reporting make it hard to know whether a job is profitable until it's already over.

Join VARC Solutions and Intuit Enterprise Suite™ – Intuit's AI-native ERP for growing businesses – for a practical conversation on modernizing job cost reporting, cutting manual close work, and gaining real-time visibility into project profitability. When: July 21, 11 AM Central

Register now: https://intuit.me/VARC

Scan to Register

BILL + Quickbooks Webinar

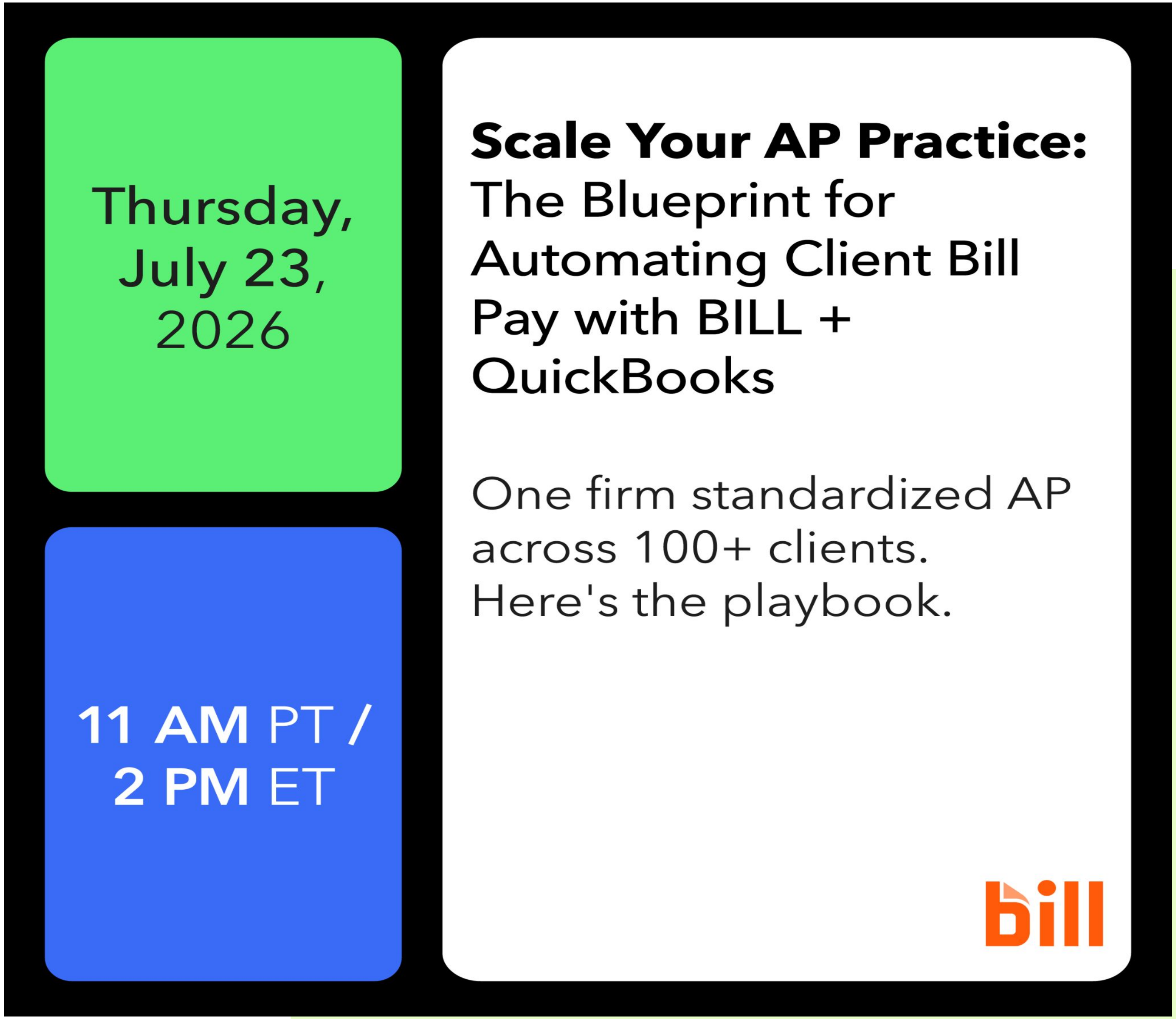
Scale Your AP Practice: The Blueprint for Automating Client Bill Pay with BILL + QuickBooks

Managing accounts payable across dozens (or hundreds) of clients shouldn't mean dozens of different processes. Join us **Thursday, July 23, 2026** to see how one firm standardized AP across 100+ clients using BILL + QuickBooks – and walk away with the playbook to do it yourself.

What you'll learn:

- How to build one repeatable AP workflow that scales across your entire client base
- Where BILL + QuickBooks integration eliminates manual bottlenecks
- Practical steps to roll this out without disrupting current client work

👉 **Register Here: https://intuit.me/4uV5rS8**

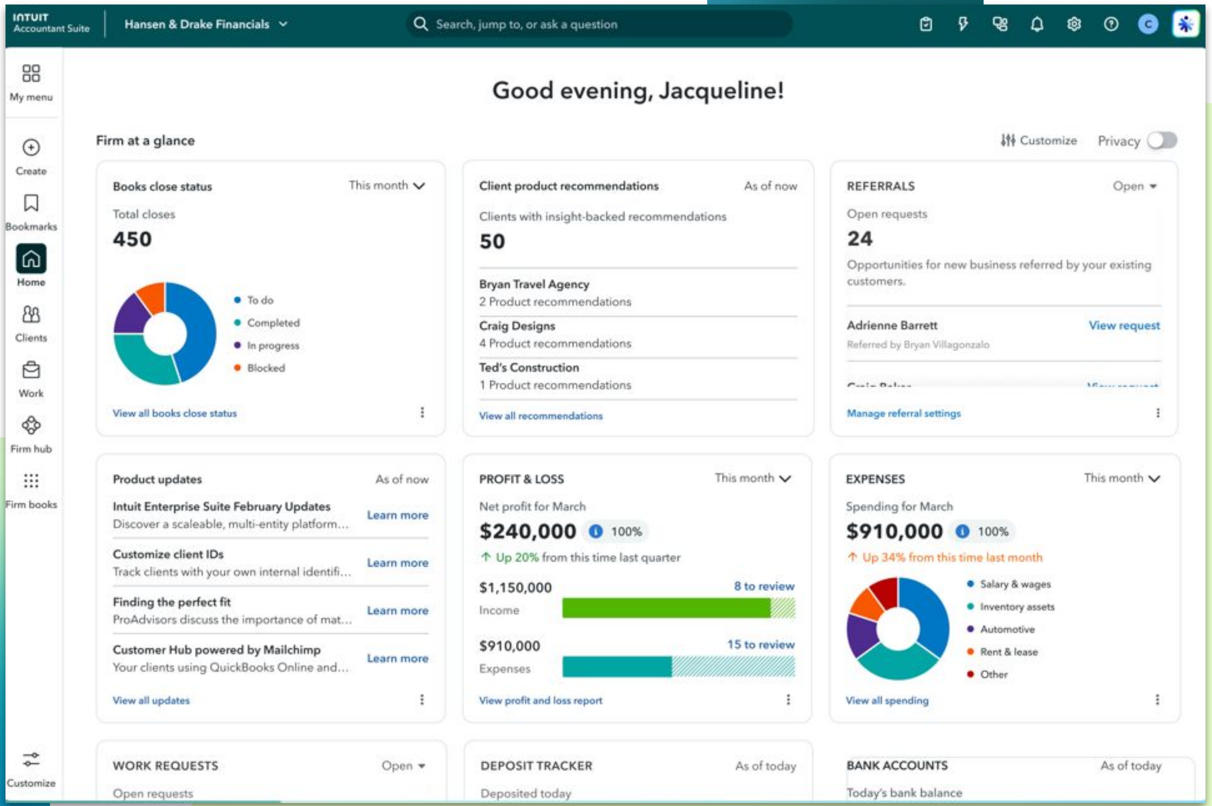


Level Up Your Accounting Practice with Intuit Accountant Suite Webinar Series

Description

This five-part webinar series is your guide to making the most of Intuit Accountant Suite. Hear directly from Intuit Partner Council Accountants and Intuit product experts sharing real, hands-on experience as you learn how to onboard your firm with confidence, turn client data into higher-value advisory work, get an early look at the new ProPartner program, and see the newest AI-powered features built to save your team time. Register for the full series and hear it straight from the accountants already living it.

Jul 21 10am PT	Onboarding Like a Pro
Jul 30 10am PT	How to Build your Advisory Practice (Accelerate)
Aug 17 10am PT	ProPartner: A partnership built for Accountants
Aug 27 10am PT	New features in action
Sep 15 10am PT	Fireside chat with Partner Council Accountants



Scan to Register

Intuit Connect - Las Vegas - Oct 26-28

INTUIT
CONNECT

October 26–28, 2026
ARIA Las Vegas

Come to connect. Leave unstoppable.

Join us in Las Vegas for three days of immersive programming designed for accounting professionals who want to stay ahead. Experience CPE-accredited sessions and get a first look at what's next across the Intuit all-in-one platform and discover how, paired with your expertise, it can help your clients thrive.

Register today to get a front row seat to the latest innovations, inspiring speakers, and community connection.

Register now to lock in your spot—and secure a group discount

Standard: $1,395 per pass
Group passes of 2-10: $1,195 per pass

Scan the QR code or visit **intuitconnect.com**

Product Innovations

INTUIT ProAdvisor
IN THE
KNOW

You asked, we listened: QuickBooks Product Improvements

Stacey Blanchard
Product Marketing

Team: Platform Product Marketing
Location: NYC

Polling question

How often have you been working in your clients' books and wished that the homepage, a specific workflow, or report would load faster?

1

Never
I've never noticed this or experienced it as a pain point.

2

Rarely
I experience this every once in awhile, but not consistently.

3

Often
I experience this frustration at least once a week.

4

Always
I experience this almost every single time I log into QBO.

In the Know

Our Approach

What we heard

This year, we've been innovating fast: Introducing new AI-powered capabilities like Payments AI, Intuit Intelligence, and other new innovations. **But building new things is only half the job. The other half is listening.** Over the past several months, we heard your feedback that QuickBooks Online could be better across the everyday workflows you rely on most: matching transactions, reconciling accounts, working in bank feeds, and helping to keep books categorized and accurate.

What we did

You told us where that matters most, and that's where we focused first. We're making **175+ meaningful improvements** in service of delivering clean books, reliable performance, and confidence to let QuickBooks do even more for you and your clients. These improvements include, but are not limited to:

- Smarter Categorization & Matching
- Streamlined Reports
- Faster workflows
- and more!

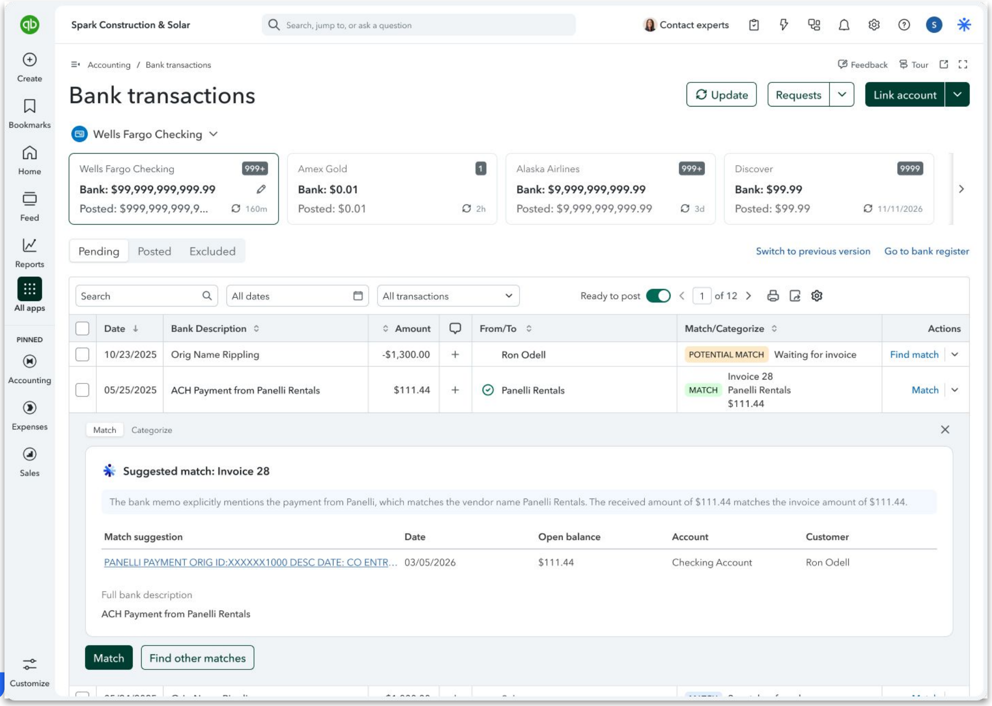
You asked, we listened

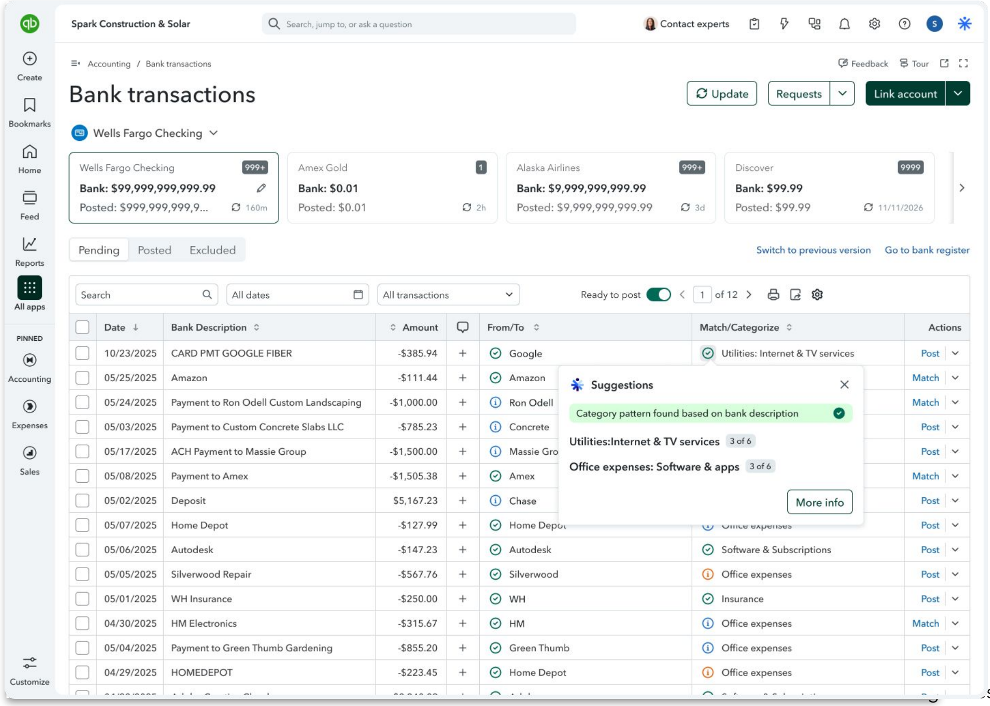
Smarter bank transaction matching

- Duplicate warnings appear before you post a transaction, not after.
- We now show you which suggested matches are high-confidence. The most likely match surfaces first, so you're not scanning a list.

Categorization that learns from you

- Suggestions refresh faster after you categorize a similar transaction, which makes moving through a batch of transactions much more efficient.
- Duplicate or conflicting rules flags so you can review and fix, instead of applying whichever comes first.





You asked, we listened

Faster, more personalized homepage & workflows

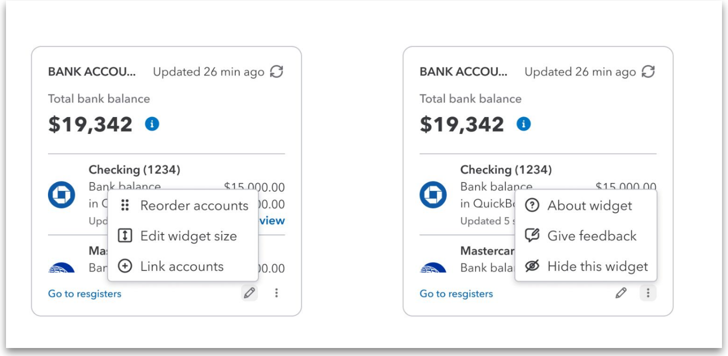
- Faster load times across homepage and core workflows.
- The dashboard is now cleaner and more customizable, allowing you to resize and reorder widgets to fit your personal workflow.

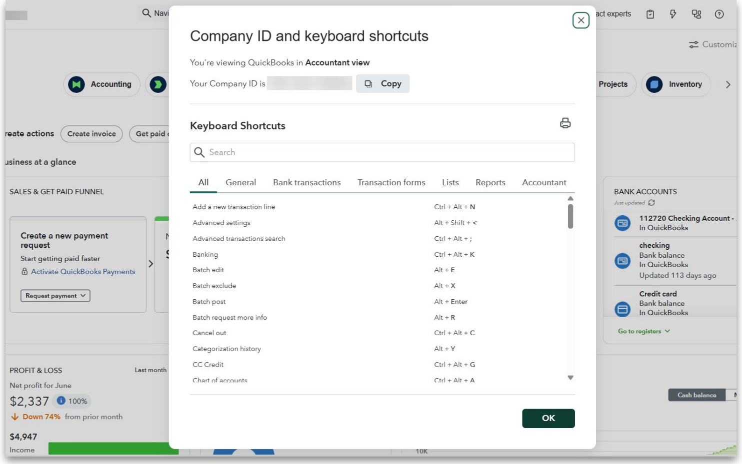
Keyboard Shortcuts help you get more done

- 100+ keyboard shortcuts cover the tasks you repeat all day and behave the same way wherever you are in QuickBooks.

Streamlined Reports

- Labels spell out every figure, columns show all your data, and pages print exactly as they appear. It's part of more than 50 improvements we're making to reports.





Fewer sign-ins and interruptions

- We're rolling out changes that keep you securely signed in longer on the devices you trust, so you're not re-verifying every time you step away.

INTUIT ProAdvisor

Q&A

Intelligent Services & Accountant Configurability

Liron Zighlenic
Director, Product Management

Team: AI+HI
Location: Mountain View, CA

Polling question

How involved is your firm in setting up new QuickBooks clients?

1. We handle the entire setup for them
2. We guide clients while they set up
3. Clients set up on their own - we review or clean up after
4. It varies from client to client

In the Know

What you've told us

You need a partner you can count on

Tech

Automate my routine tasks to improve my profitability

Growth

Help me grow my top line by reaching new clients and scaling advisory

People

Uplevel firm's skills with training and certifications in the era of AI

In the Know

Accountants are our customer, not a channel

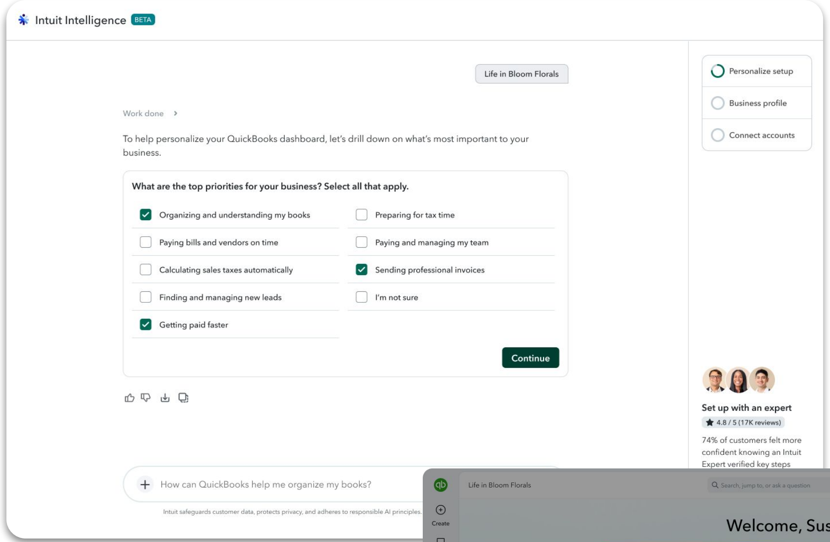
1. **You're at the center of the relationship**
   When a business chooses you, we strengthen that relationship, we don't go around it

2. **Built in, not bolted on**
   One unified platform where you and your clients work together, with your advisor role built in

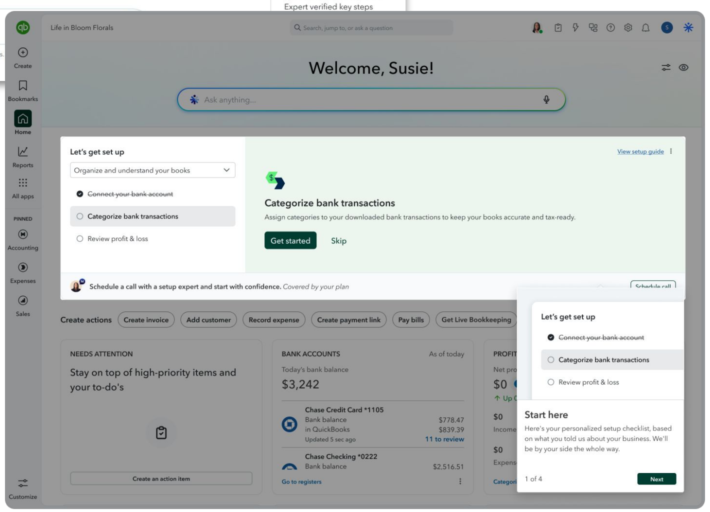
3. **All in on your growth**
   Intuit Experts onboard and set up new customers, and we'll connect new clients to your firm

Core workflows

Onboarding: set up right from day one



New conversational onboarding step to understand the client's top priorities



New setup widget on the homepage dashboard

Getting it right from day one makes everything else better:

- Clients share their business name and top priorities – Intuit Intelligence tailors the setup with less manual entry
- An Intuit setup expert is available to coach business owners through every step - as many times as they like during the first 90 days
- A new personalized, dynamic Setup Hub replaces the static checklist with important tasks relevant to your client's business and goals
- *Coming soon*: clients can attach your firm's information right in the setup flow

A client set up correctly is easier to serve - on day one and as they grow.

In the Know

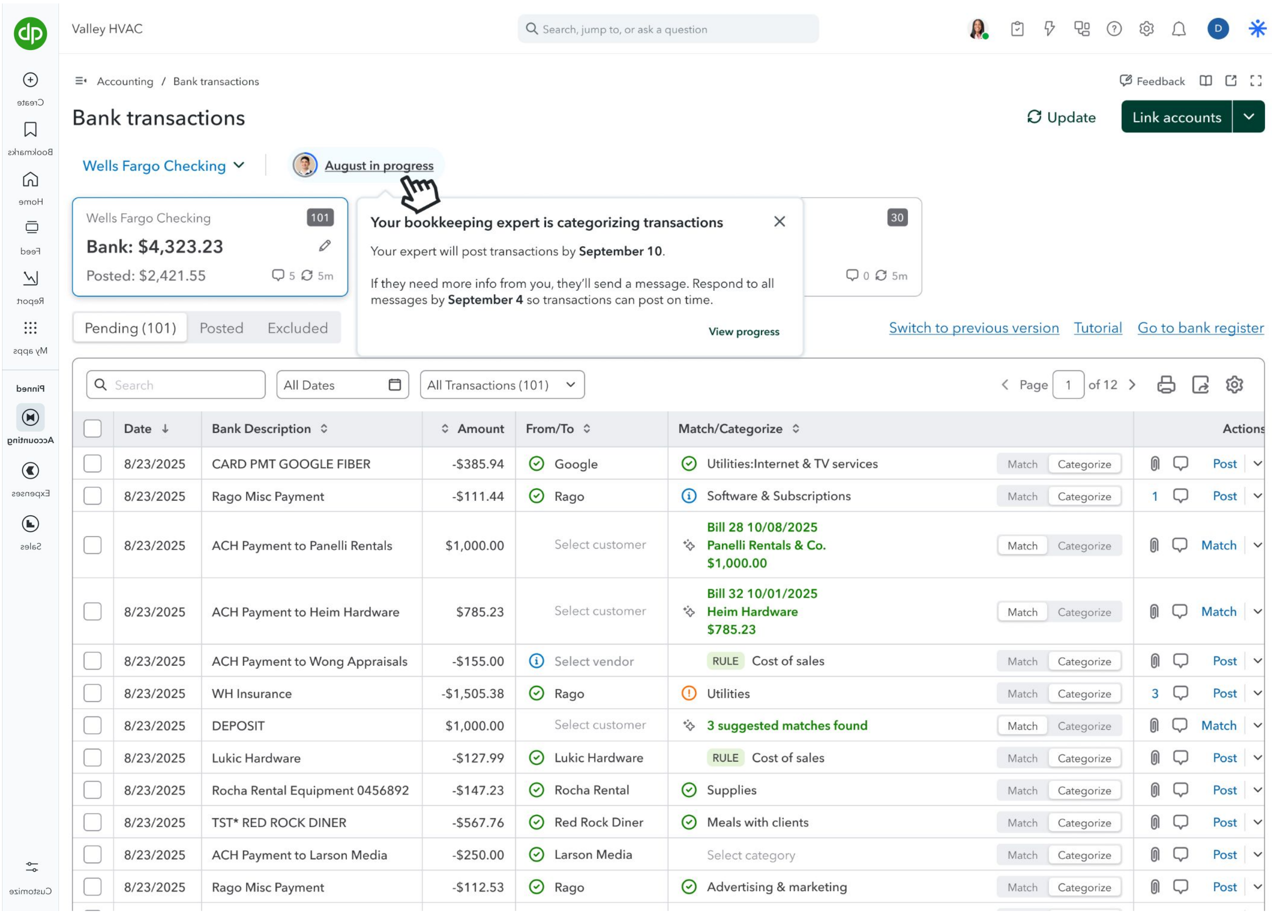
Your success in the era of AI is our top priority

Expert-verified auto categorization

Launching August 2026 · QuickBooks Online Plus & Advanced

- AI takes the first pass at categorizing, tailored to each business and its configuration
- An Intuit expert reviews and verifies in the background
- High-confidence transactions post; anything uncertain is flagged to the business owner
- Bookkeeping summary shows owners what's handled and what needs their input
- Advanced adds regular Intuit expert check-ins to keep books continuously clean

More confident decisions with less manual work. Less time re-categorizing. More time advising

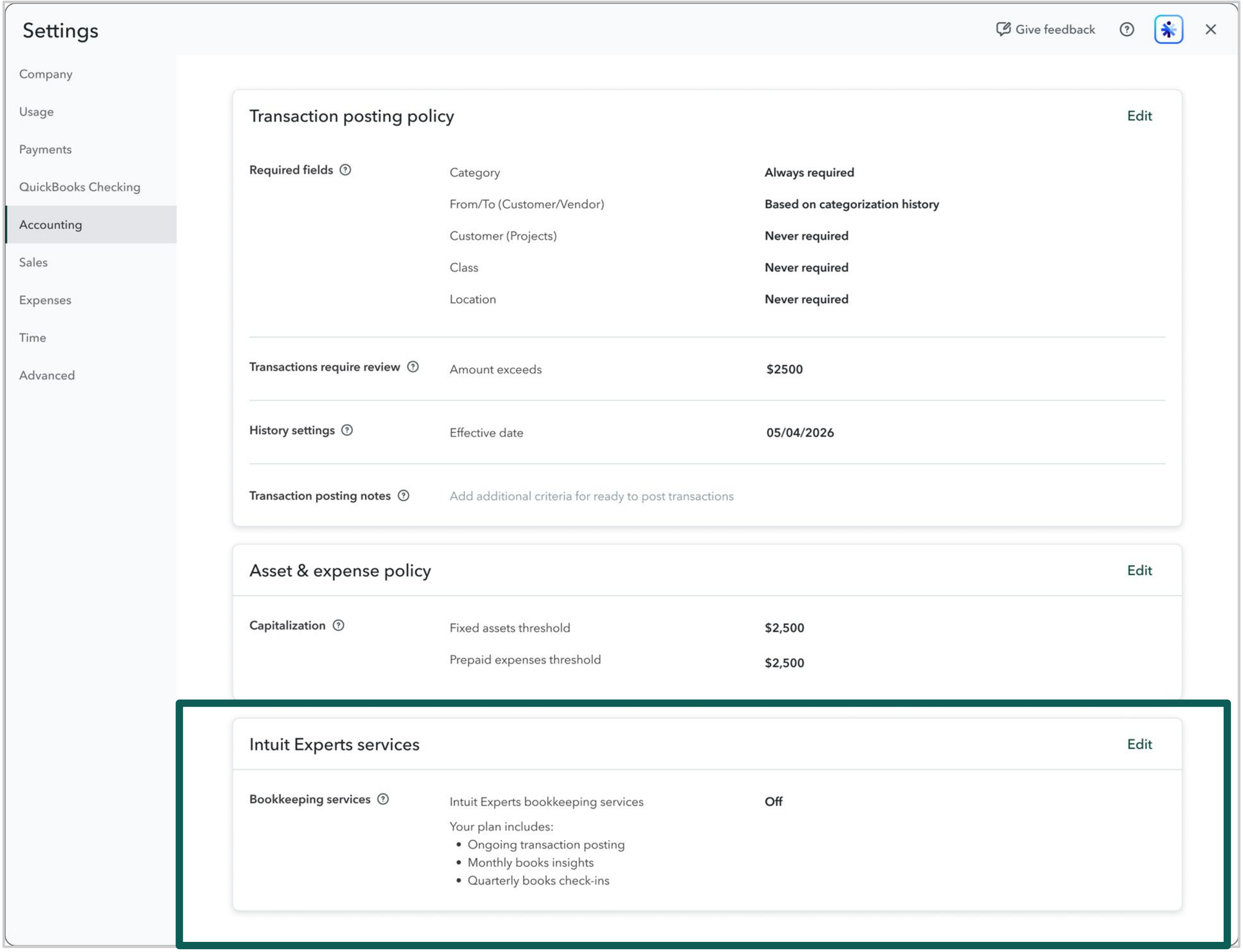


You stay at the center

For any client with an accountant attached in QuickBooks:

- Off by default for any business with an accountant attached
- Never marketed to your clients. If they explore it, we encourage them to talk to you first
- You're notified if a self-setup client still chooses to turn it on
- You enable it for firm-billed clients, no one else can

This is just the beginning. We are continuing to build so you will have even more control.



Q&A

Intuit Accountant Suite

Hailey Garcia
Product Manager 2

Team: Small Business Group
Location: Mountain View

Polling question

Have you tried **Intuit Accountant Suite?**

1. I had not heard of it
2. Haven't tried it yet
3. Trying it currently
4. Tried it and went back to using QBOA

Our Approach

New IAS Core Features

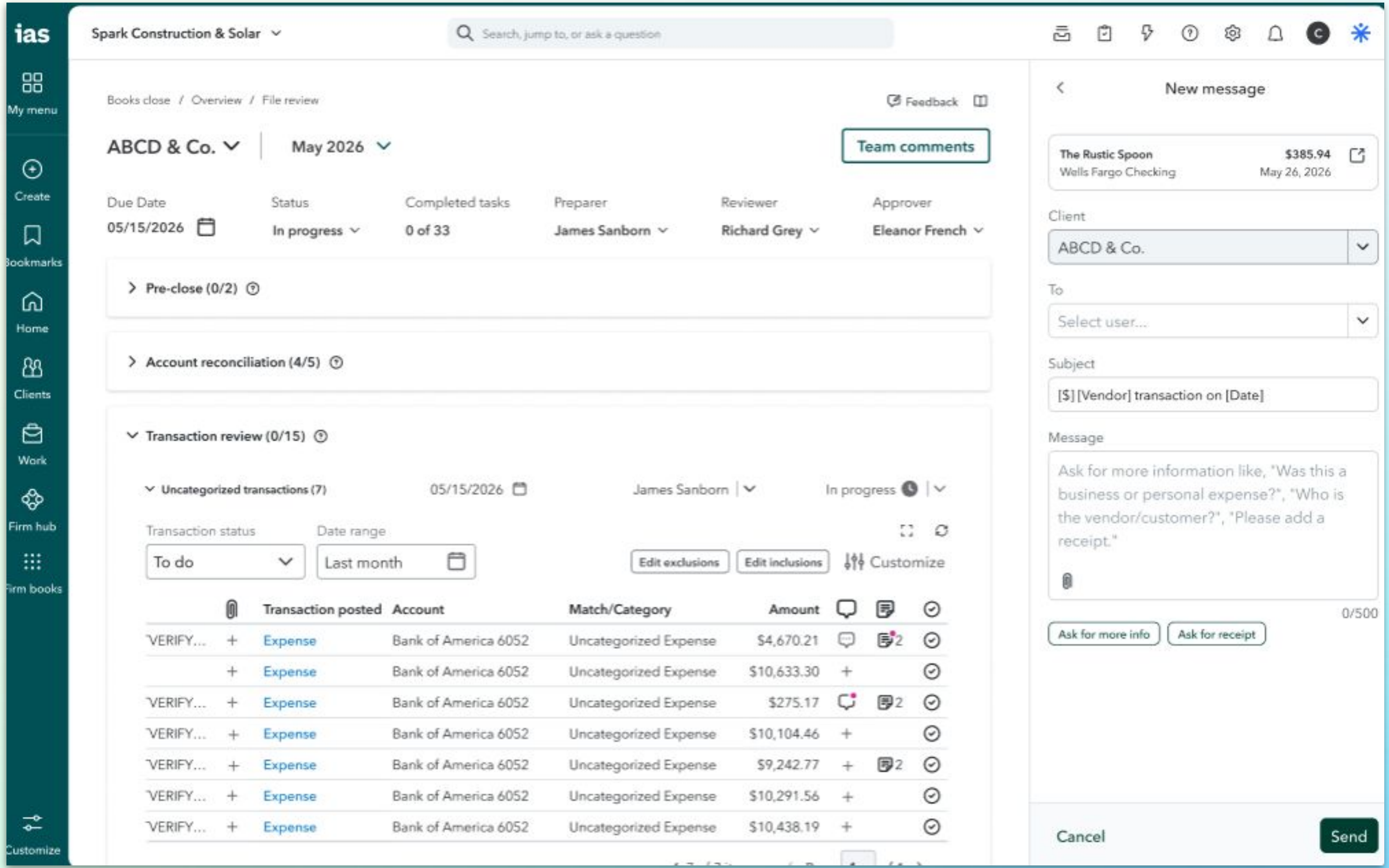
What we heard

- Firms struggle with inefficient context switching that costs time
- Fragmented conversations and data impact the ability to connect with clients in a seamless way

What we did

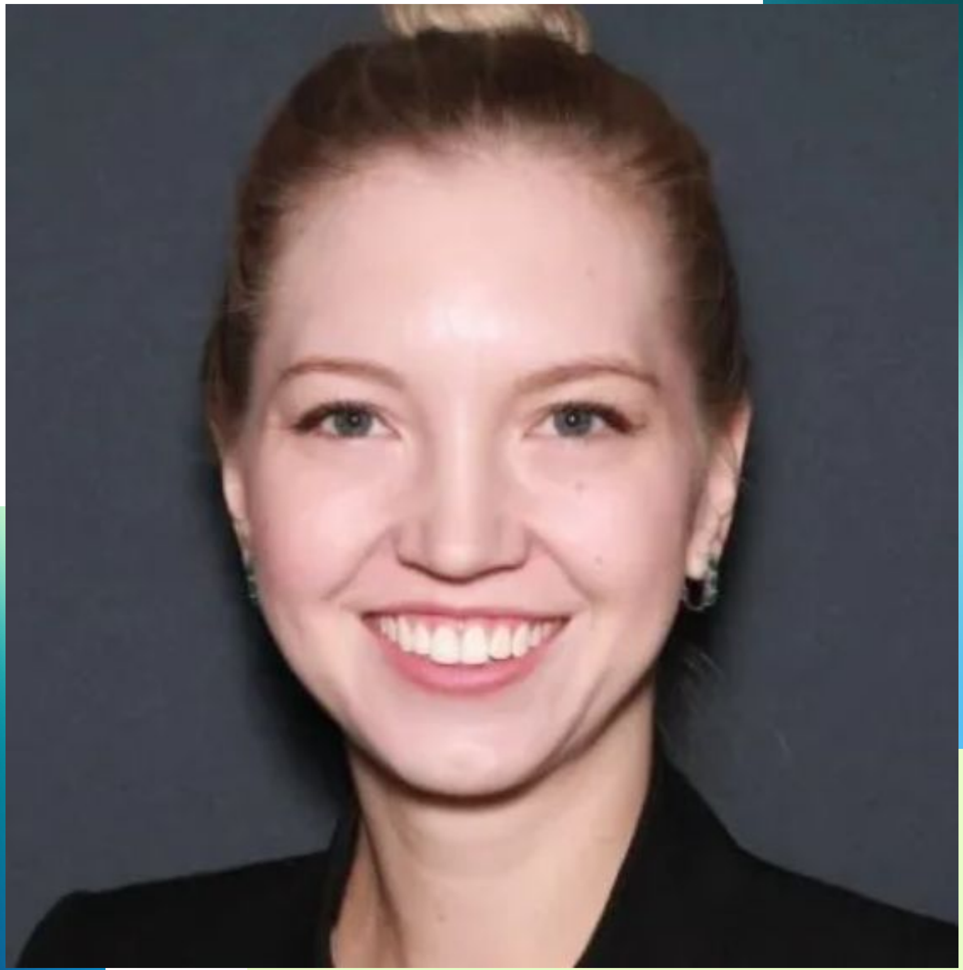
- **Multiple Tabs:** Enables multiple QuickBooks Online client files to open at the same time, all through IAS
- **Inbox:** Creates a centralized place to connect with clients. Inbox is designed for easy access to all client requests. SMS notifications sent to clients (once accepted) when they have actions to take

Multiple Tabs & Inbox Live Demo



Kaitlyn Wilchynski
Principal Product Manager

Team: Accountant
Location: Mountain View



Polling question

What **size** is your firm?

1

Small
1-4 employees

2

Medium
5-19 employees

3

Large
20-99 employees

4

Mega
> 99 employees

Our Approach

New IAS Accelerate Features

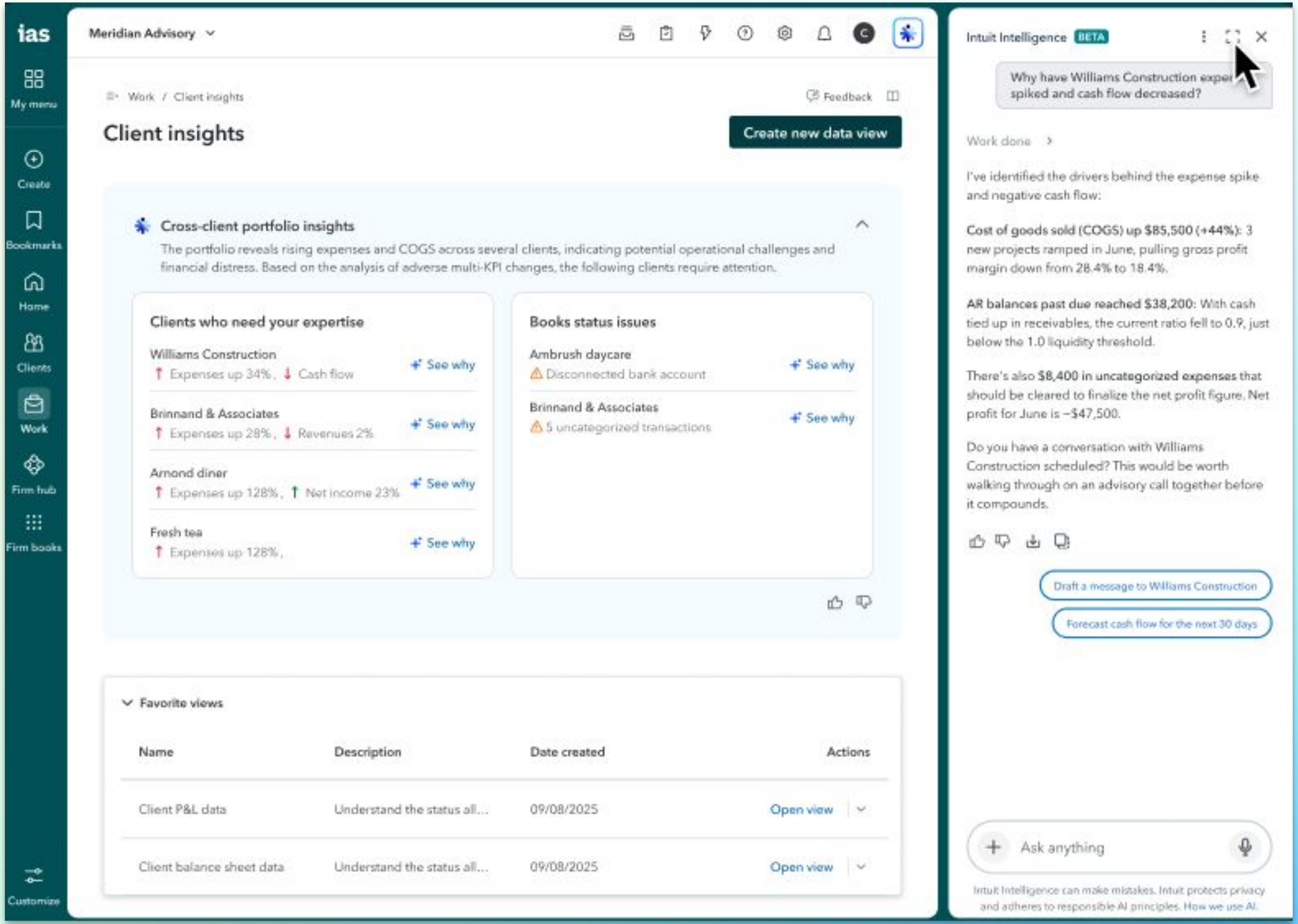
What we heard

- Siloed work streams with dispersed data impacts the ability to see the big picture
- Firms are looking for ways to grow their advisory services and need the ability to decision faster with greater confidence

What we did

- **Cross-client/portfolio-level Insights:** Compares financial data across your entire client portfolio. Ask sophisticated questions and get immediate, real-time insights without extensive effort
- **Portfolio Summary:** Surfaces what needs your attention across the portfolio

Cross-client/ Portfolio-level Insights & Portfolio Summary Live Demo



Q&A

Polling question

Interested in a personalized conversation? Pick the topics where you'd like an expert from our team to reach out directly. (Select all that apply)

1. Intuit Accountant Suite
2. QuickBooks Online
3. Intelligent services
4. No, thank you. I would not like to be contacted.

What's around the corner?

On the books podcast

On the books schedule

Upcoming episodes:

- 2026 Accountant Technology Survey Report Overview

And be sure to check out these recent episodes:

- Live from the Better Together Tour!
- Q&A with Intuit Leaders

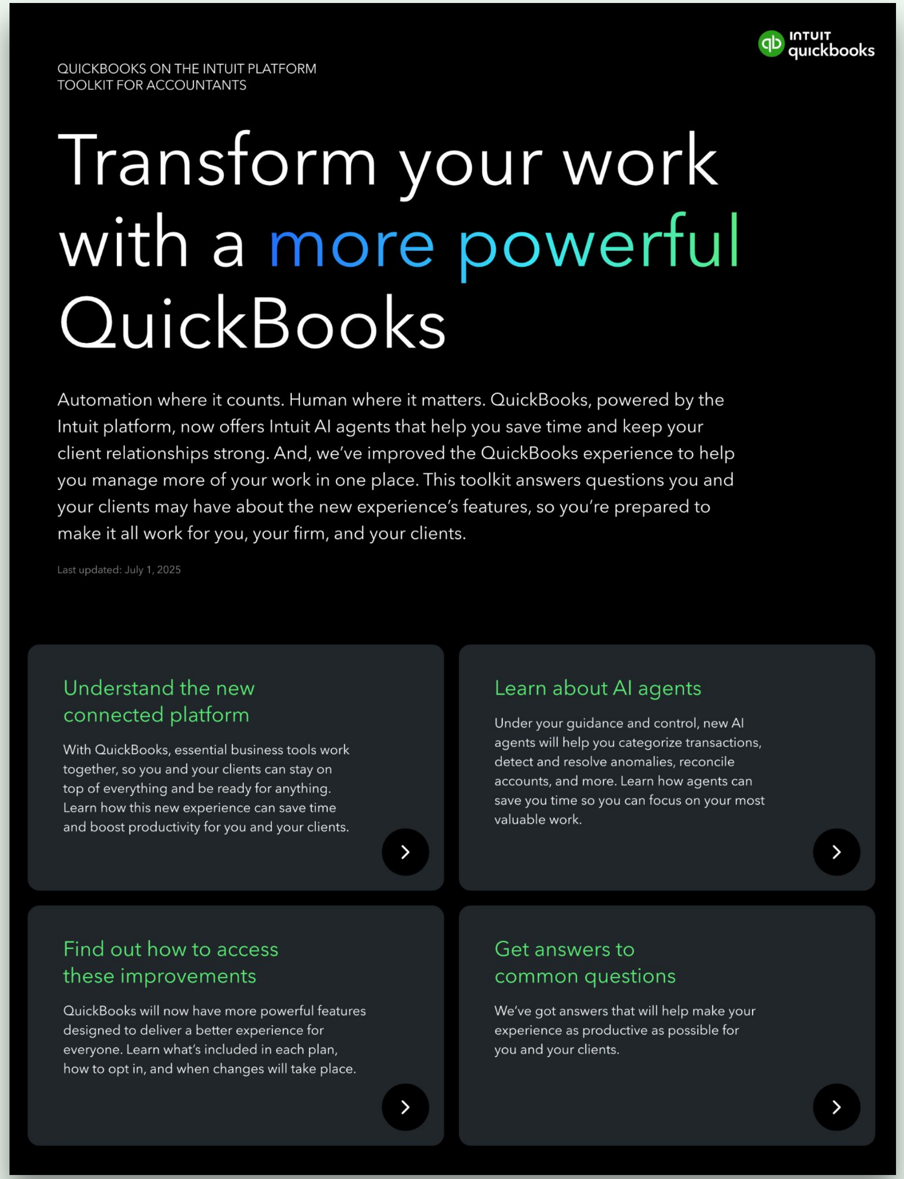
Download wherever you listen to podcast and find full show notes at firmofthefuture.com

Resources

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 here



INTUIT quickbooks

QUICKBOOKS ON THE INTUIT PLATFORM
TOOLKIT FOR ACCOUNTANTS

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.

Thank you

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