

INTUIT ProAdvisor

IN THE KNOW



INTUIT ProAdvisor
INTHE
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 latest updates to the Modern Reports feature
 - Identify the newest releases in the Intuit Enterprise Suite ecosystem
 - Understand the Intuit ProPartner Accountants program and its offerings
-

What's around the corner

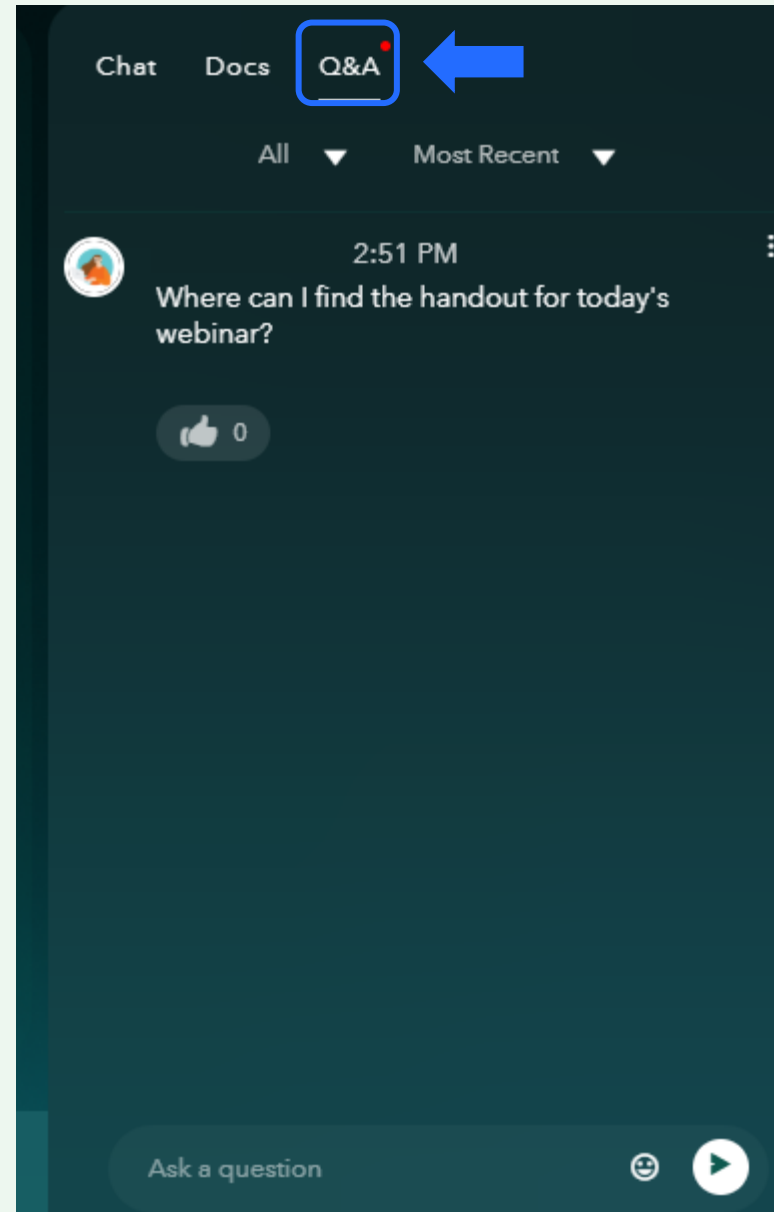
Questions & feedback

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.

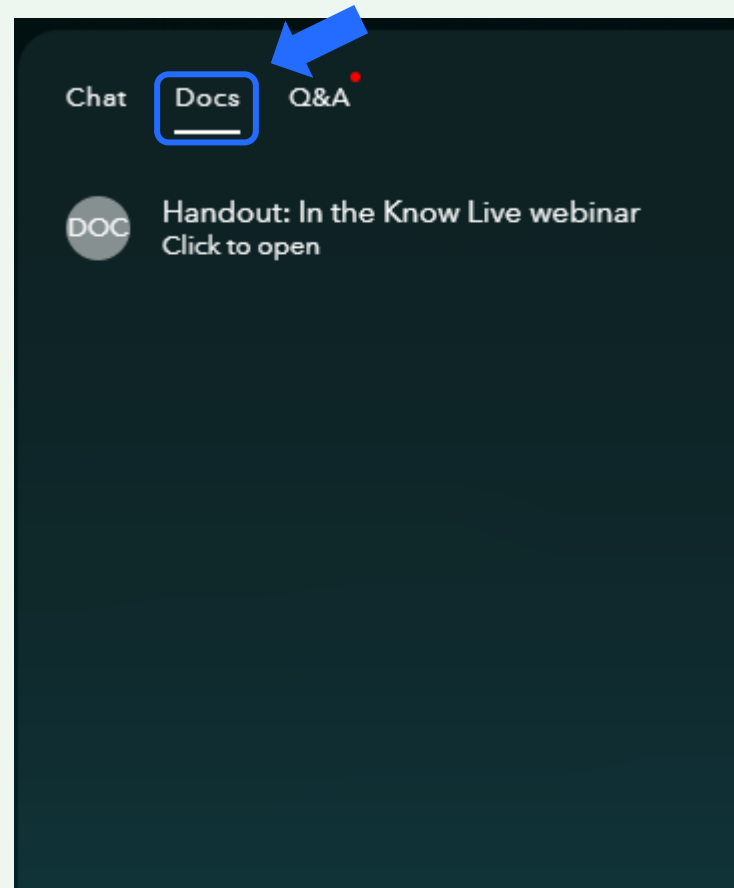
Chat is not enabled for audience members.



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.

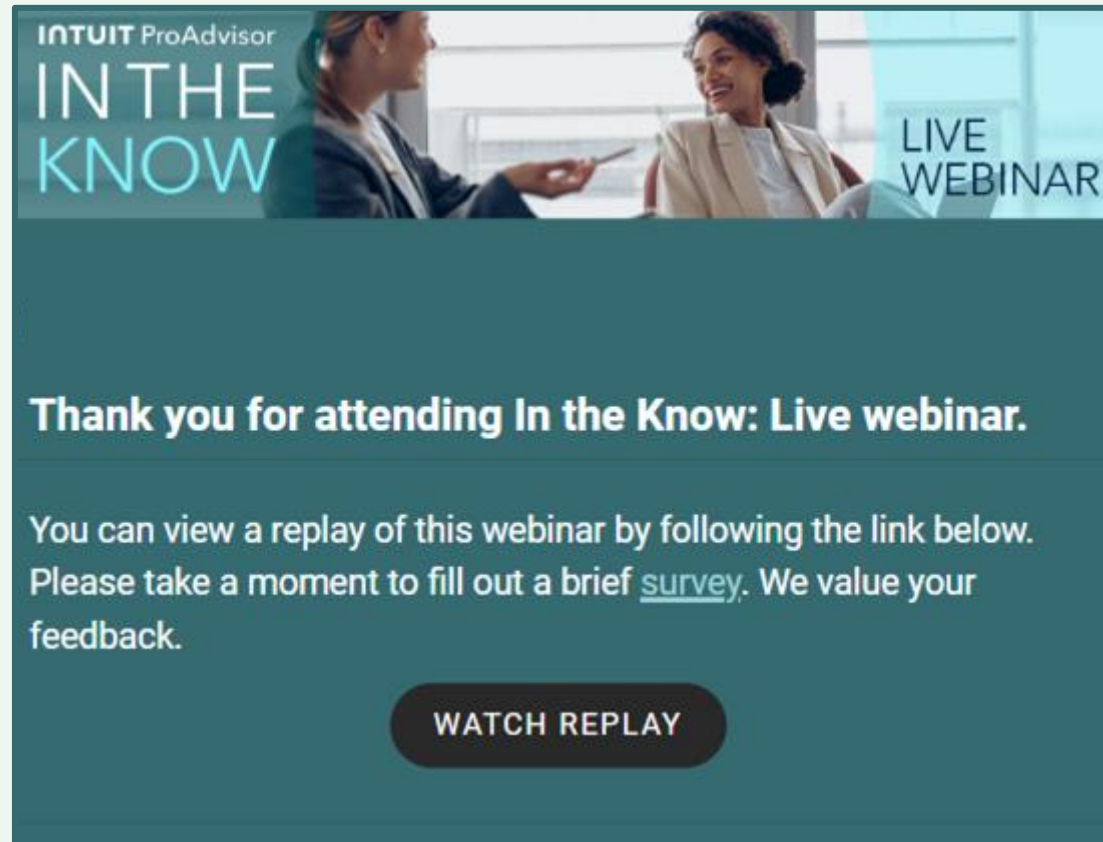
The screenshot displays the Intuit ProAdvisor interface with a dark theme. At the top, there are four navigation tabs: 'Chat', 'Poll', 'Docs', and 'Q&A'. The 'Poll' tab is highlighted with a blue box and a red dot, and a blue arrow points to it from the top right. Below the tabs, a poll question is displayed: 'Do your clients use Intuit Enterprise Suite?'. There are two radio button options: 'Yes' and 'No'. Below the options is a 'Submit' button. In the bottom right corner, a notification bubble is visible with the title 'Vote for Polls' and the text 'Visit the Polls tab to view live results.' The notification bubble contains two buttons: 'CLOSE' and '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.

A graphic for a webinar thank you message. At the top, there is a banner image showing two women in business attire talking. The text 'INTUIT ProAdvisor' is in the top left, 'INTHE KNOW' is in large letters across the middle, and 'LIVE WEBINAR' is in the top right. Below the banner is a dark teal background with white text. The text reads: 'Thank you for attending In the Know: Live webinar.' followed by 'You can view a replay of this webinar by following the link below. Please take a moment to fill out a brief [survey](#). We value your feedback.' At the bottom center is a dark rounded rectangle with the text 'WATCH REPLAY' in white.

INTUIT ProAdvisor
INTHE
KNOW
LIVE
WEBINAR

Thank you for attending In the Know: Live webinar.

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

WATCH REPLAY

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

Stop managing multiple entities across disconnected tools

If you're managing multiple entities, you already know the pain: logging in and out of separate systems, reconciling intercompany transactions by hand, and hunting through hundreds of chart of accounts entries, just to build a P&L your CFO can actually use.

Join Intuit Enterprise Suite and Intuit's #1 QuickBooks Solution Provider of the Year, **Fourlane** for an upcoming webinar to bring you ***From Chaos to Clarity: How Multi-Entity Businesses Are Closing the Books Faster.***

Built for financial business leaders juggling multi-entity chaos, this 30-min demonstration will address 5 common finance challenges and one simple path forward.



June 25,
10:00 AM PST
1:00 PM EST

INTUIT
Enterprise Suite

From Chaos to Clarity: How Multi-Entity Businesses Are Closing the Books Faster

Presented by Intuit and Fourlane

Stop managing multiple entities across disconnected tools, messy spreadsheets, and weeks-long close cycles. See exactly how finance teams like yours are getting to consolidated, investor-ready reporting, without the manual work.

Fourlane®

Register for the
webinar



Scan the QR code to register for the webinar.

INSIGHTFUL ACCOUNTANT'S 2026 TOP ADVISOR AWARDS

Jeff Siegel – ProAdvisor of the Year

Alisha Delancey – QuickBooks Online ProAdvisor

Marjorie Adams – Mid-market ProAdvisor

Rebecca Sheppard – QBO App-ologist

Laura LaMantia – QuickBooks Desktop ProAdvisor

Jennie Morris – QBD Integrations

Ibironke (Ibi) Ojo – CAS ProAdvisor

Alicia Katz Pollock – ProAdvisor Educator

Lisa Burnett – Niche Practice ProAdvisor

Rachael Dauchy – Social Guru ProAdvisor

Samantha Simmons – Up-n-coming ProAdvisor

Dominique Waits – Tax Advisor

Clive Hand – International ProAdvisor (*Ireland*)



FREE VIRTUAL EVENT

Be at the forefront of what's next.

Get up to speed on new updates across the Intuit platform—and put them to work for your clients right away. Don't miss our next free virtual event, designed to accelerate the growth of your practice.



Scan to register

INTUIT connect 

JUNE 23 | 9:30-10:30 AM PT — VIRTUAL

Make the switch to Intuit Accountant Suite

Quickbooks Online Accountant will be discontinued December 31, 2026

- We're answering your top questions in our new [QBOA to IAS FAQ](#)
- See our latest [Firm of the Future blog post](#) for a checklist to prepare to upgrade to IAS
- Check out the [Intuit Accountant Suite pricing page](#) to find a plan that is best for your firm and compare all features
- Explore the [QBOA to IAS Guide](#)



New QB Advanced Advisory Bundle and Offer

What is the QuickBooks Advanced Advisory Bundle?

- Combination of **QBO Advanced + QB Workforce Elite** powered by AI to elevate your client advisory services
- For firms that want to support clients that run a bigger business, but want to run lean. This bundles helps you to:
 - 1) Save time and get work done** with back office automations to accelerate ME close. Apply RBAC to 25 users vs. 5 (Plus).
 - 2) Lower costs with a platform that scales.** Monitor the business with robust reporting, scorecards, and forecasting. **Bill Pay Elite** to include free ACH, approval workflows (Aug).
 - 3) Workforce Elite** now includes payroll, time tracking, HR and benefits to grow with your client's team and business needs.

→ Limited-time Offer through July 31, 2026

- **70% off list price for first 12 months**
- Firm-billing required
- Available through Accountant Sales
- Call +1 (844) 545-3357 or [schedule a call](#)
- [Terms apply](#)



Better Together Tour

Description

Join us in person to build community, grow in your work, and learn new ways to thrive in an AI-driven industry.

With the Intuit [Better Together Tour](#), accountants can gather in Atlanta, Los Angeles, Dallas or Miami for hands-on learning, product discovery, and networking with peers and Intuit leaders—all while earning CPE credit to support professional certifications.

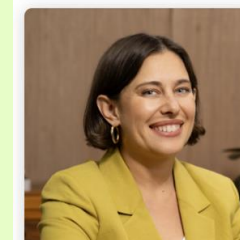
About the events

- For firm leaders navigating growth in small and medium-sized accounting firms
- Half-day workshop
- Tradeshow-style setting
- Cost: \$49 per ticket

Remaining shows

- Dallas: July 23
- Miami: July 29

[RESERVE YOUR SPOT](#)



Jaclyn Anku
Principal ProAdvisor
Program
Intuit



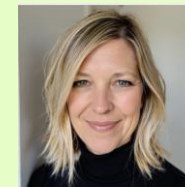
Brittany Brown
CEO
LedgerGurus



Carla Caldwell
CEO
Candella Accounting &
Advisory Services



Lisa Gilreath
Partner in Client
Accounting Services,
Sorren
Local Ambassador



Alicia Eastvold
CPA, Client Technology
Solutions Leader at YPTC
Local Ambassador



Roman Villard
Founder of Full Send
Finance
Local Ambassador



Hector Garcia
CEO REFRAME
Local Ambassador

Helping Accountants Streamline and Scale Webinar Series

Description

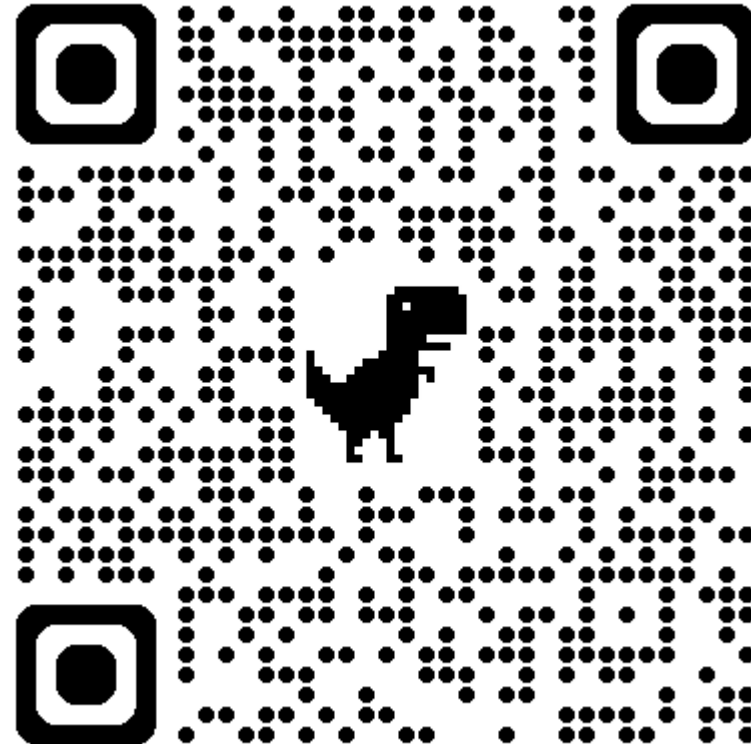
This webinar series will show you how Intuit Enterprise Suite empowers your firm to manage the most complex clients more efficiently. You'll learn how to leverage multi-entity accounting and automated workflows to close books faster, and use AI-powered multi-dimensional reporting to move quickly from reconciliation to strategic client advisory. We will also cover deep dives into the construction and non-profit industries, as well as a session on FAQs.

Session Dates

- June 24 - From Desktop to Digital: Future-Proofing Your Business with Intuit Enterprise Suite
- July 8 - Is Intuit Enterprise Suite Right for You? Answering Your Toughest Questions About Intuit Enterprise Suite

Sign up today for one of these informative sessions:

<https://ieswebinars.intuit.com/accountants>



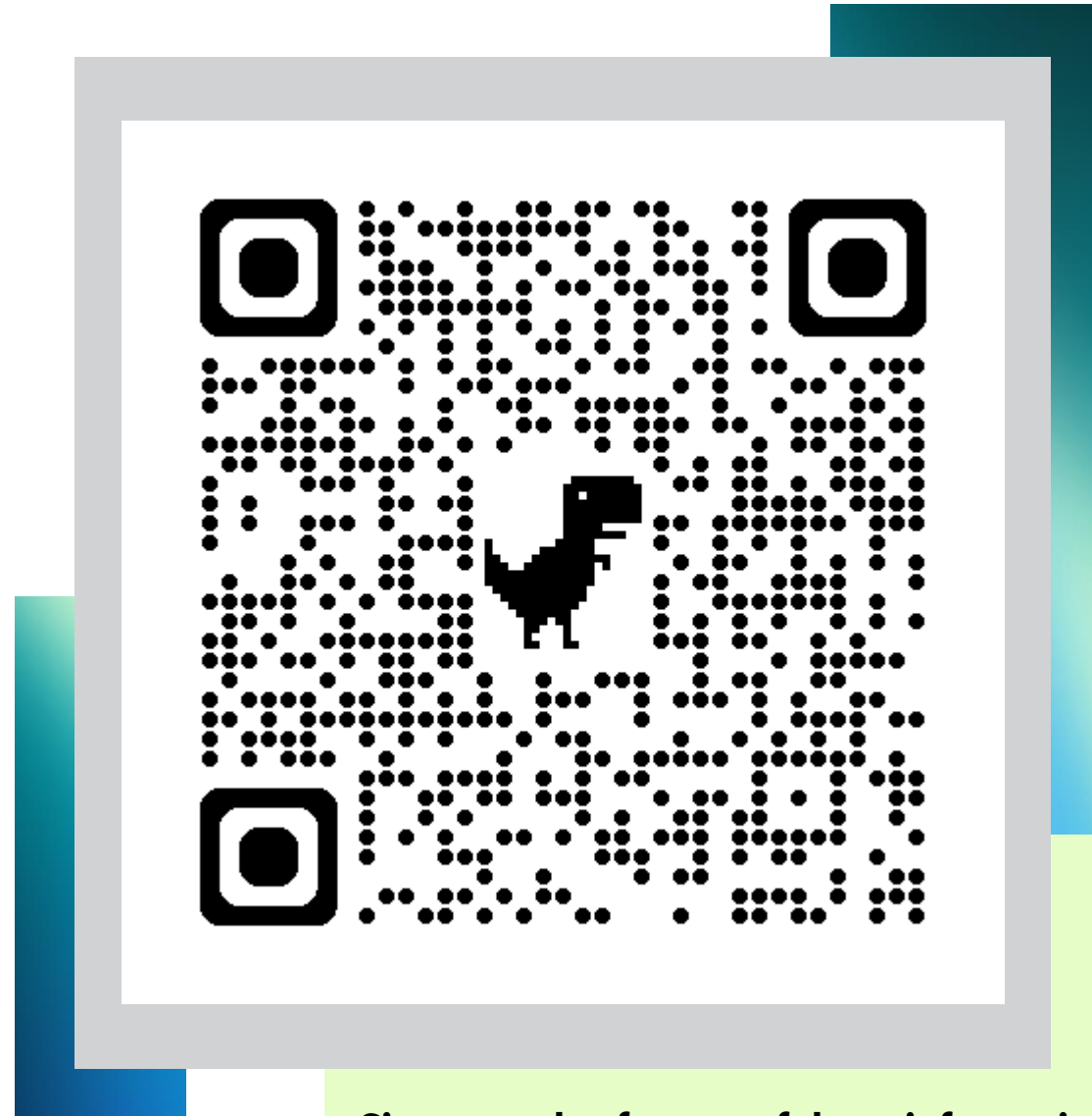
Introducing - Elevating CAS Webinar Series

Description

In this 6-part webinar series, discover how to evolve from financial advisory into a business performance advisor. As automation and AI reshape the profession, the most valuable advisors are those who can move beyond reporting to drive growth, enable better decisions, and influence how businesses are run.

You'll learn the five core competencies that define this next generation of CAS, helping you expand your impact, elevate your role with clients, and accelerate your own career trajectory in the process.

Date	Title
6/25	Elevating CAS: Performance Strategist - Identifying What Really Drives Revenue and Margin
7/9	Elevating CAS: Strategic Partner - Enabling Sales, Marketing & Operations to Perform
7/14	Elevating CAS: Growth Catalyst - Activating Change to Unlock Profitable Growth
7/23	Elevating CAS: Executive Influencer - Shaping Decisions and Influencing Direction



Sign up today for one of these informative sessions:
<https://ieswebinars.intuit.com/accountants/registration>

Product Innovations

Modern Reports

Subhanan Sahoo

Sr Staff Product Manager

Team: Business Intelligence
Location: Bengaluru



Polling question

How often do you use the modern version of reports compared to the classic version in QuickBooks?

1

I use the modern version almost always - it's my primary choice

2

I switch between both depending on the report or task

3

I only use the classic version - haven't switched to modern yet

4

I don't really notice the version - I just use whichever report opens

Fast facts

All

All companies across SKUs

When

June 15th - Aug 15th

How

QBO > Reports > Standard/Custom
report

Where

All regions

Modern Reports – Why We Built It & What It Means for You

THE PROBLEM

Classic Reports was built on old technology

- ✗ Monolithic design - one outage breaks the experience for every customer
- ✗ Performance degrades as your transaction data and user base grow
- ✗ Locked into static tables; no dashboards, pivots, or custom formulas
- ✗ Small changes required months of coordinated effort to ship

WHAT YOU GAIN



Scalability

Large datasets, complex reports & multi-entity consolidation stay fast - No timeouts as your business grows



Faster Innovation

Modular architecture means improvements that once took quarters now ship to your hands in weeks



Advanced Analytics

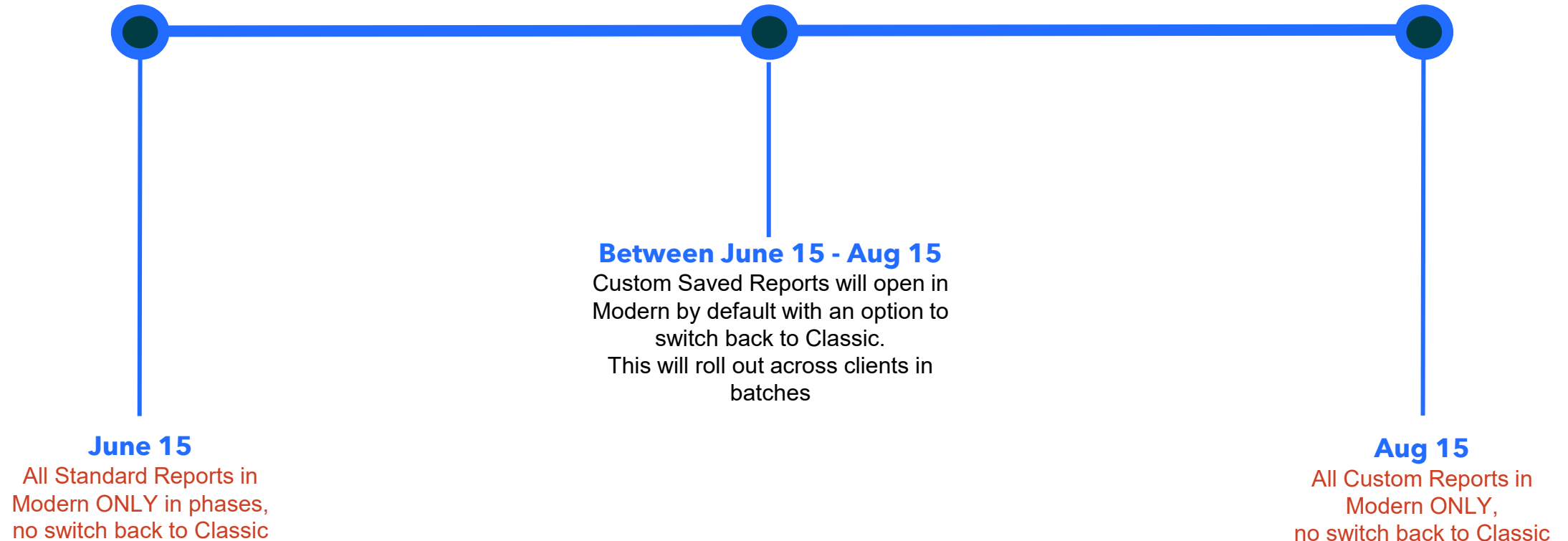
KPI dashboards, pivot-style analysis & calculated fields and other capabilities Classic Reports simply couldn't deliver



Stronger Reliability

Isolated components contain outages to smaller scope, protect other customers, and resolve issues faster

Report Sunset Timelines



Improvements in Modern Reports

Performance & Visuals

- Gridlines, Banded Rows & Column Colors
- Empty Cells as "Blank" or "Dashes"
- Company Name as First Line option
- Formulas on Export to Excel

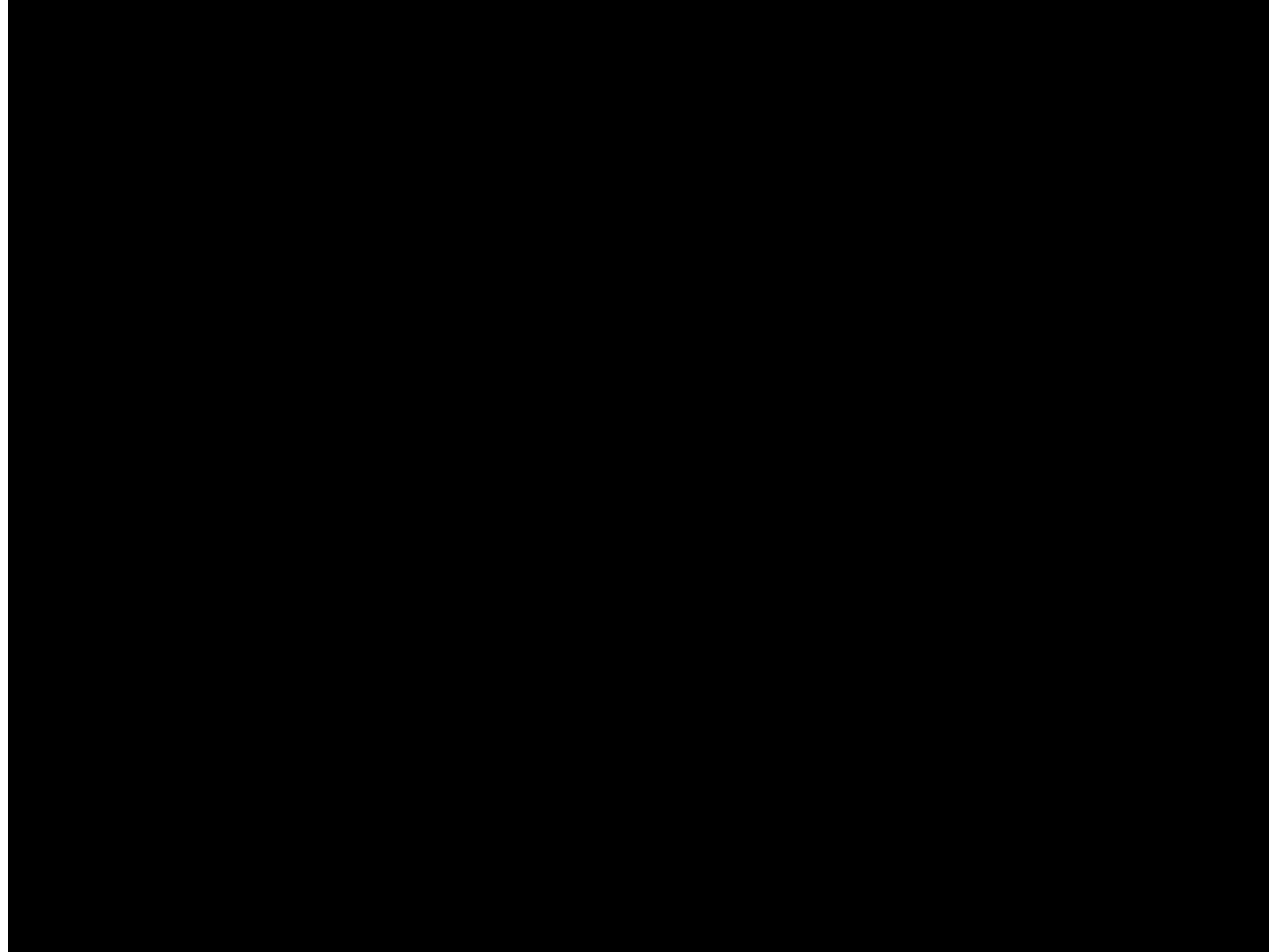
Workflow and Customization

- Customizations in Batch
- Auto-refresh after editing transactions
- Customizations Persist upon Refresh
- Sharing custom reports with Firm
- Auto Refresh & Highlight Changes (Detail)

Data & Report Specifics

- Full Data Parity (Balance Sheet, Aging)
- Right Click & CTRL Click Support
- Collapse All vs. "Collapse" (Summary)
- Transaction ID in Detail Reports

DEMO



Drive Link

<https://drive.google.com/file/d/1UEIQWbFxBiFiMLWwEdgEkXsiGwMITGf/view?resourcekey>

Loom Link

<https://www.loom.com/share/61431189e7bb4899a364d92792614a7b>

<https://www.loom.com/share/61431189e7bb4899a364d92792614a7b>



Q&A

Intuit Enterprise Suite

Likith Lanka

Senior Staff Product Manager

Team: Mid-Market
Location: Mountain View, CA



What is the most complex consolidations use case your clients have?

1

One level Entity Hierarchy without Eliminations (non-GAAP)

2

Multi Level Entity Hierarchy with proportional consolidation (non-GAAP)

3

One level Entity Hierarchy with Eliminations (GAAP)

4

Multi-level Entity Hierarchy with consolidations (GAAP compliant)

Entity Hierarchy & Consolidations with Eliminations

What we heard

1. Balance sheet does not balance while using account eliminations
2. Consolidation for large organizations is manual and tedious



What we did

We've released 2 major features

- Transactional eliminations
- Entity hierarchy & consolidations with 3 methods (Early Access)

Fast facts

Who

Accountants with Mid to high complex IES multi entity clients

When

Live as of June 2026

- Eliminations: General Audience
- Multi Level Consol: Early Access

How

- Consolidated View > Accounting > ICTs > Elimination Settings
 - Consolidated View > Hierarchies
-

Where

US

Entity Hierarchy & Consolidations with Eliminations

INTUIT Enterprise Suite | Consolidated View

Back to standard reports

Report period: This year to date | From: 01/01/2026 | To: 06/14/2026 | Accounting method: Cash Accrual | Filter by company: Legal | Display columns by: Company

Consolidated balance sheet
As of June 14, 2026

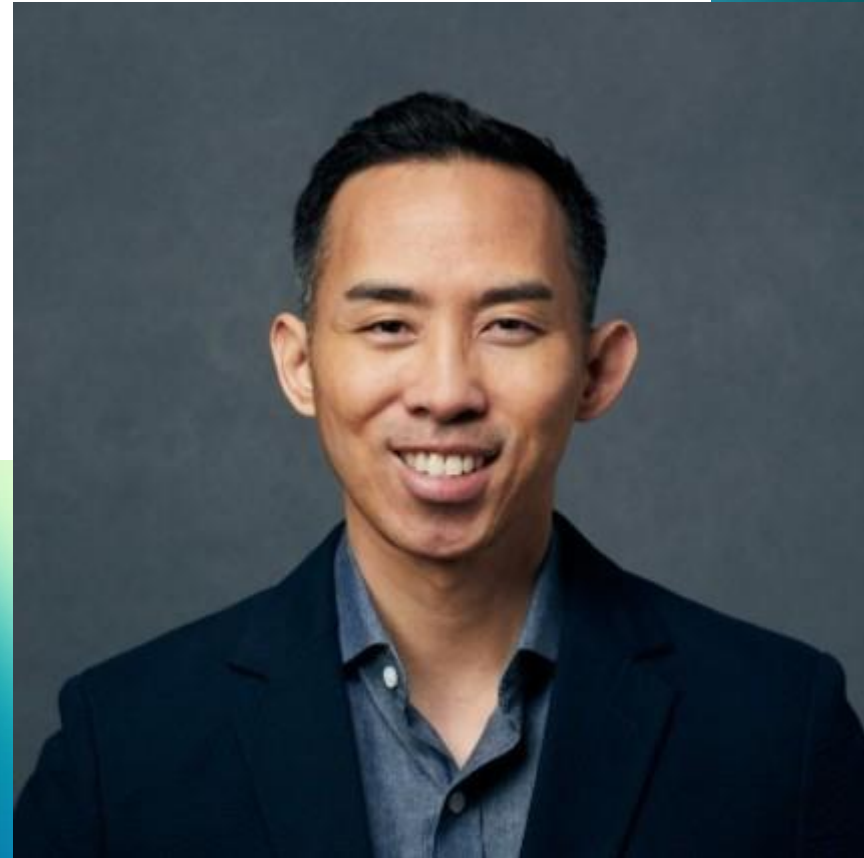
	Top level	Subsidiaries		Eliminations	Other eliminations	Total
	Lanka Global Holdings	Lanka Manufacturing (100%)	Lanka Construction (100%)			
Assets						
Current Assets	45,916.66	6,490.00	-1,983.30	-11,150.02	\$0.00	\$43,114.59
Fixed Assets						
Other Assets						
Total for Assets	45,916.66	6,490.00	-1,983.30	-11,150.02	\$0.00	\$43,114.59
Liabilities and Equity						
Liabilities						
Current Liabilities	4,100.00	12,846.68	2,483.34	-11,150.02	\$0.00	\$12,462.50
Long-term Liabilities						
Total for Liabilities	4,100.00	12,846.68	2,483.34	-11,150.02	\$0.00	\$12,462.50
Equity	41,816.66	-6,356.68	-4,466.64	\$0.00	\$0.00	\$30,652.09
Total for Liabilities and Equity	45,916.66	6,490.00	-1,983.30	-11,150.02	\$0.00	\$43,114.59

Sunday, June 14, 2026 11:31 PM GMT-07:00

Intuit Enterprise Suite Accountant Revenue Share Update

Richard Kan Senior Product Marketing Manager

Team: Accountant Marketing
Location: San Diego, CA



Intuit Enterprise Suite Revenue Share updates

Rev Share Program Enhancements

- Refer your new or existing client to IES and receive **30% revenue share based on eligible IES subscription fees in Year 1**
- Available for client referrals through July 31
- Rev Share payouts to be aligned with client's frequency of payments—monthly or annually
- Available to firms approved for the ProAdvisor Revenue Share program
- [Refer your client to IES](#) today in QBOA/IAS





Q&A

Announcing Intuit ProPartner Accountants

Jaclyn Anku
Leader,
ProProPartner
Accountants Program

Team: Accountant

Location: Mountain View, CA



Introducing Intuit ProPartner Accountants

What we heard

Firms today face a “triple threat” of rapid AI adoption, a talent shortage and shifting client expectations towards advisory. They need a partner program that helps them address these challenges.



What we did

We are evolving the ProAdvisor Program to better serve the modern firm. By centering on expanded benefits, future-focused education, and a new community pillar, we are delivering a more meaningful experience that reflects a true partnership.

Fast facts

Who

Firm Leaders at accounting, advisory
and tax firms of all sizes

When

Coming soon in early 2027

How

Transition to IAS now

Where

Global

Benefits we continue to provide



Discounts for you and your clients

ProPartner firms will continue to get the 30% **ProAdvisor Preferred Pricing** for QuickBooks Online, QuickBooks Workforce, and QuickBooks Bill Pay, as well as the 30% **direct-pay discount for clients** during their first twelve months.



Software for your firm

You'll get **QuickBooks Online Advanced**, Bill Pay Elite, Workforce Elite, and Time Tracking—, through the My Books feature of IAS.



Training and certifications

Training and certifications will continue to be **free and available for all partners.**

New benefits deep dive

New benefits



Customer support

Always-on resolution center: Lets all partners track open tickets and status updates in IAS, so you don't have to call in for updates.

Dedicated accountant support: Every expert is ProAdvisor Certified, and trained in financial principles and accountant-specific workflows.

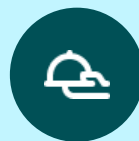
Increasing specialization for higher tiers: As partners move up tier, support hours expand and representatives become even more specialized in accounting workflows.



3x longer revenue share, and more

3 years of revenue sharing (all ProPartners): When clients adopt QuickBooks Online or Workforce, we're now expanding the duration of revenue sharing from one year to three. And - we're introducing 3-year IES revenue share.

More upside opportunity (higher-tier ProPartners): With each tier, your firm's revenue share can grow up to 25% of net billings. (US only).



Intuit Accountant Suite

Free IAS Accelerate delivers critical client insights: Smart tools show client insights and benchmarks while flagging anomalies across financial metrics, payroll data, and more.

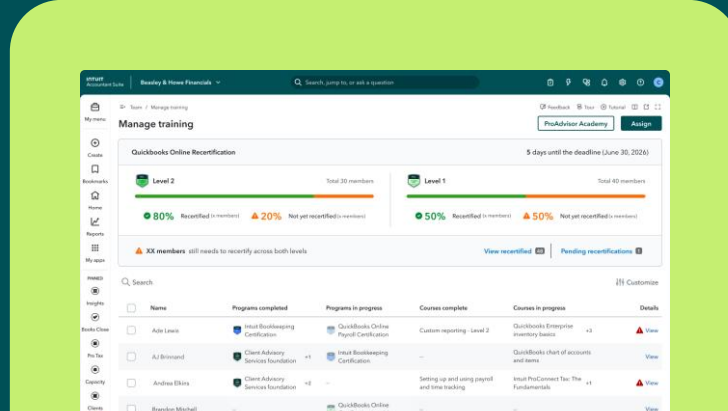


Future focused education for all partners



CAS training

Uplevel staff from manual bookkeeping skills to high-margin Client Advisory Services, so they can turn software-driven insights into actionable business recommendations.



Training on AI for accountants

Learn how to harness this industry-changing technology to accelerate workflows, reduce administrative overhead, and surface deep client insights.



Training manager in IAS

Assign courses to staff and track progress in real time, ensuring your entire firm is equipped to deliver the strategic insights your clients demand.

A connected community

Giving all partners the professional networks you need to thrive.

BUILD A GROUP OF TRUSTED PEERS

Better Together

Connect locally with other firm leaders to exchange ideas and learn from your peers. Our goal is for every partner to have a trusted group of peers you can look to for advice and inspiration.

RECRUIT THE NEXT GENERATION

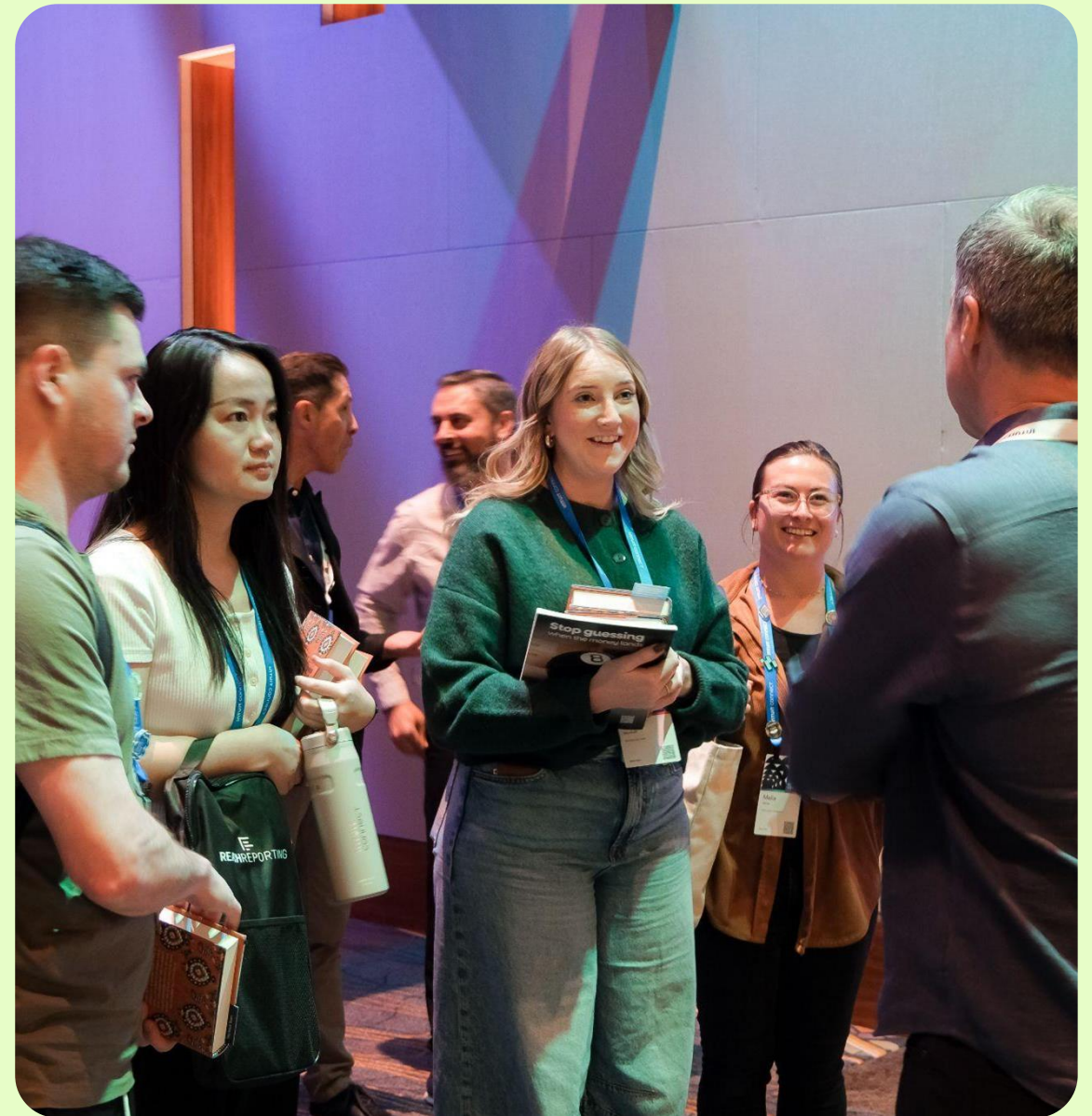
Career Pipeline Program

We're working with universities to upskill one million accounting students on technology and CAS. And we'll connect them to you through student mentorship programs.

HONORING EXCELLENCE

Awards Program

We'll celebrate ProPartners who are innovating, giving back, and setting the standard for modern accounting, with prizes that elevate their voices nationwide.



Intuit ProPartner Accountants Tiers

ProPartner Accountants tiers



To become a Partner and start accessing rewards, you'll need to:

- Have at least one person at your firm be actively certified
- Have at least one active client



Tiers, points, and benefits

In Fall 2026, we'll publicly share additional details about ProPartner Accountants, including:

- 1 What your firm's projected tier will be based on your current status
- 2 How firms can maximize their benefits by moving up to higher tiers
- 3 The exact benefits of each tier

What firms can do now

1

Transition to Intuit Accountant Suite

To become a member of Intuit ProPartner Accountants, a firm must transition to Intuit Accountant Suite. Remember the Core plan is free.

2

Ensure certifications are up-to-date

At least one firm member must be actively certified before moving beyond the Member tier.

3

Consolidate your consoles

To maximize the value of the program, put a plan in place to consolidate consoles (if this applies to your firm). This ensures that when your projected tier is revealed in Fall 2026, it accurately reflects your entire book of business.

Polling question

Are you ready for ProPartner Accountants?

1

Yes.

My team is certified and I'm in IAS.

2

Almost.

My team is certified, but we're not yet on IAS.

3

Kind of.

I'm on IAS, but my team needs to get certified.

4

Not yet.

I need to transition to IAS and get my team certified.



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 Enterprise
Suite feature
updates/Revenue
share

2

ProPartner
Program

3

Modern Reports

4

No, thank you.
I would not like
to be contacted.

What's around the corner?

Manage your team's recertification

The screenshot shows the 'Manage training' page for 'Quickbooks Online Recertification'. At the top, it indicates '5 days until the deadline (June 30, 2026)'. Below this, there are two progress bars: one for Level 2 (Total 30 members, 80% Recertified, 20% Not yet recertified) and one for Level 1 (Total 40 members, 50% Recertified, 50% Not yet recertified). A summary bar shows 'XX members still needs to recertify across both levels'. At the bottom, a table lists team members and their certification progress.

Name	Programs completed	Programs in progress	Courses complete	Courses in progress	Details
[Name]	Intuit Bookkeeping Certification	QuickBooks Online Payroll Certification	Custom reporting - Level 2	Quickbooks Enterprise inventory basics +3	View
[Name]	Client Advisory Services foundation +1	Intuit Bookkeeping Certification	--		
[Name]	Client Advisory Services foundation +2	--		Setting up and time	
[Name]	--	QuickBooks Online Certification Level 1	--		
[Name]	QuickBooks Online Certification Level 1	QuickBooks Online Certification Level 2 +2	Managin		
[Name]	Intuit Bookkeeping Certification +1	Client Advisory Services foundation +1	Sales and Level 1		

See which team members still need to recertify by June 30th in Intuit Accountant Suite!

Click **View not yet recertified** to see a list of who hasn't recertified.

!! Note:

- You don't need to assign recertification training to your team, that's handled for you.
- If you don't see a team member - they don't need to get recertified this year.

The modal window shows a bar chart with 'Certified (2)' in grey and 'Not yet certified (2)' in blue. Below the chart is a table with columns for NAME and RECERTIFICATION LEVEL.

NAME	RECERTIFICATION LEVEL
[Name]	QBO Level 2
[Name]	QBO Level 1

See who was decertified

Manage training

Quickbooks Online Recertification

Recertification period ended

Level	Total Members	Recertified (%)	Decertified (%)
Level 2	30	75%	20%
Level 1	40	60%	40%

xx members need Quickbooks Online Certification Level 1. Select reassign to get the certification process started.

[View details](#) [Reassign](#)

Name	Programs completed	Programs in progress	Course
Ade Lewis	Intuit Bookkeeping Certification	QuickBooks Online Payroll Certification	Custom
AJ Brinnand	Client Advisory Services foundation +1	Intuit Bookkeeping Certification	--
Andrea Elkins	Client Advisory Services foundation +2	--	Setting and tim
Brandon Mitchell	--	QuickBooks Online Certification Level 1	--
Camila Soares	QuickBooks Online Certification Level 1	QuickBooks Online Certification Level 2 +2	Manag
Dawn Jones	Intuit Bookkeeping Certification +1	Client Advisory Services foundation +1	Sales a Level 1

Starting July 1, you'll see who was QuickBooks decertified and for what level.

Click **Reassign** to assign QB Level 1 certification training everyone that was decertified.

Quickbooks Online Recertification

Certified **Decertified**

Important note: Members who have not finished their QuickBooks Online Level 2 recertification must retake the Level 1 certification.

Name	Level
Name@mail.com	Level 1
name@mail.com	Level 1

On the books schedule

Upcoming episodes:

- Q&A with Intuit Leadership
- How to building a solid measurement system with Brittany Brown - Live from Better Together

And be sure to check out these recent episodes:

- Introducing Intuit ProPartner Accountants
- A Discussion on Technology Change Management

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



Thank you