

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 newest *Buy now, Pay later* feature
 - Identify how to best use *Books Close*
 - Understand the benefits of *payroll modernization*
 - Recall the latest updates to *QuickBooks Bill Pay*
-

What's around the corner

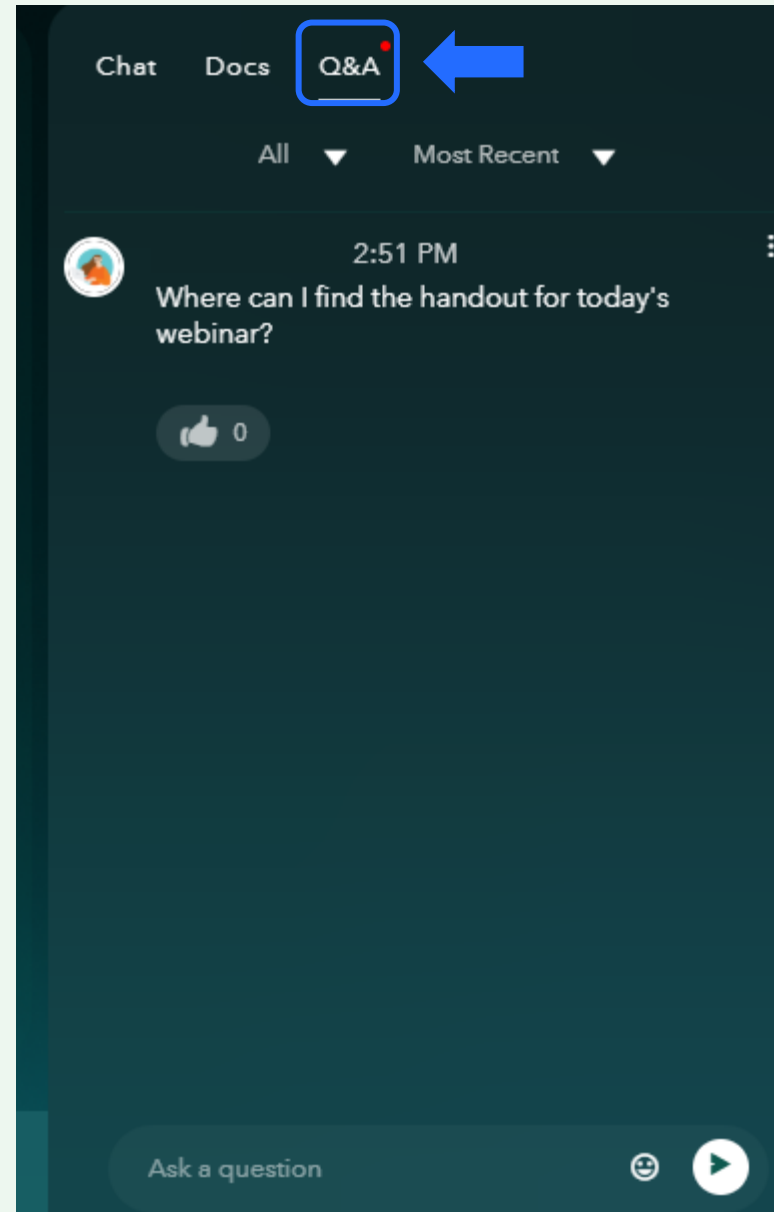
Questions & feedback

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.

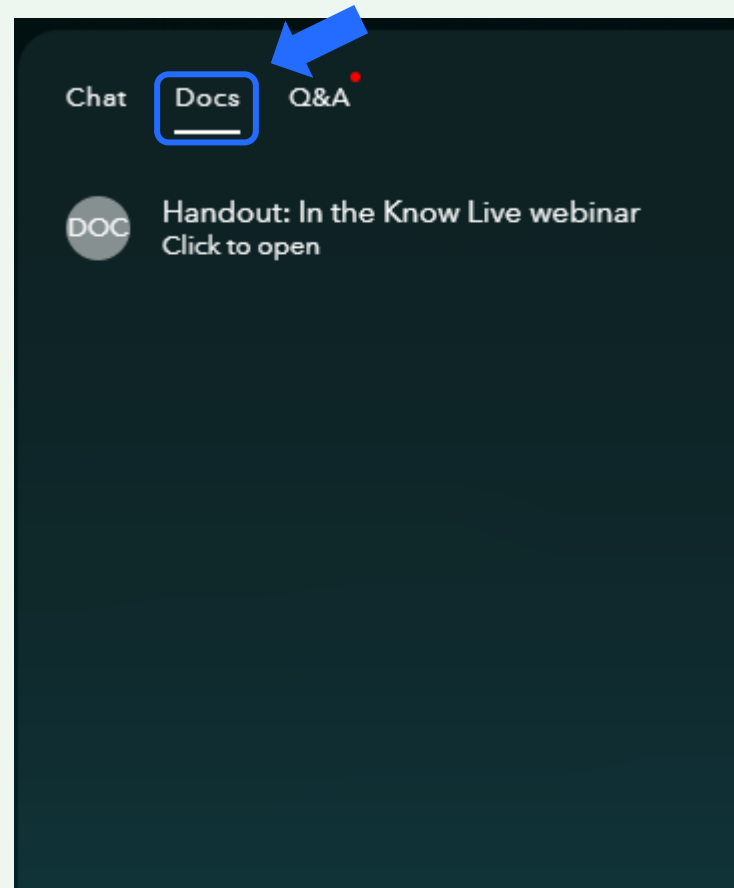
Chat is not enabled for audience members.



Supporting materials

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

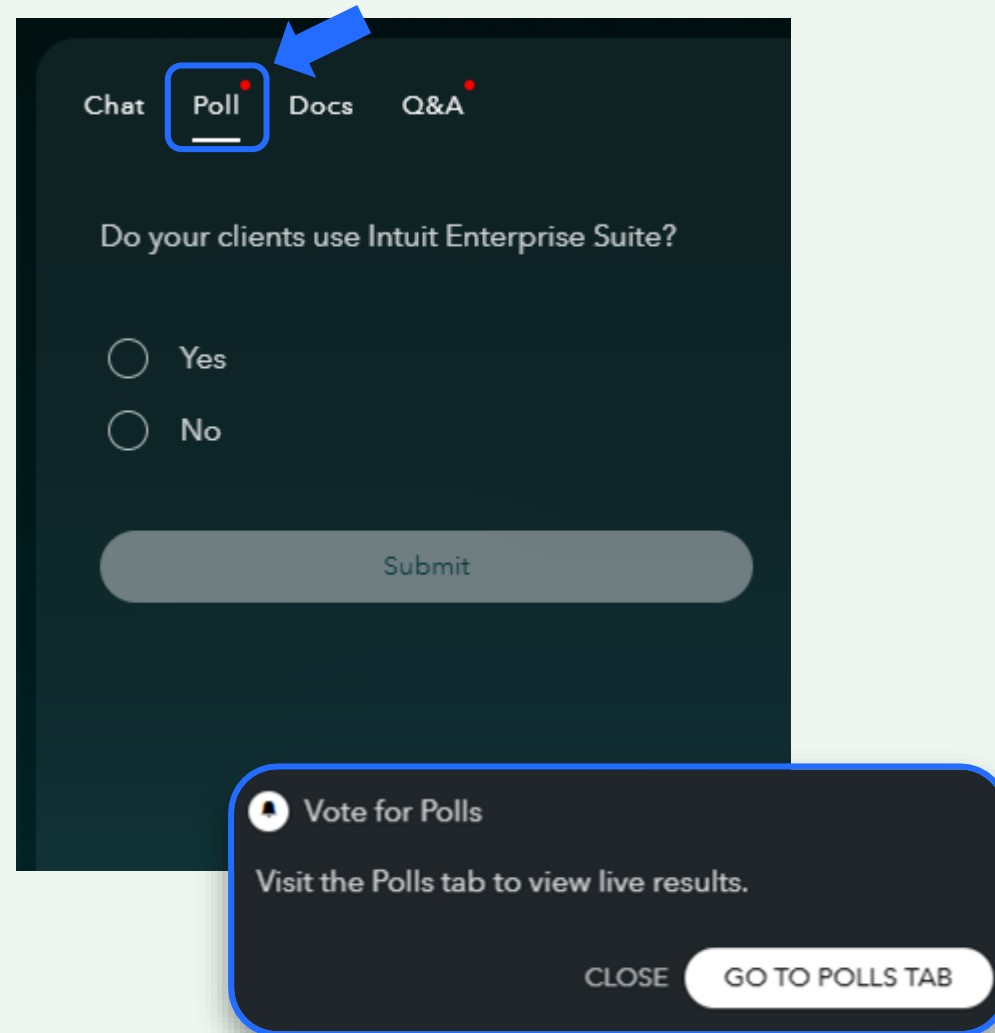
This is a PDF copy of the slide deck for this session.



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.



INTUIT ProAdvisor
IN THE 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

Insightful Accountant[®]



Voting for the Top 100 U.S. ProAdvisor Awards, the Top International ProAdvisor Awards and the Top Tax Advisor Awards will begin on **March 24, 2026**, and continue through **April 26, 2026**. ***Be certain to cast your vote for the eligible ProAdvisors of your choice.***

Use the QR Code above (starting 3/24/26) to access the Voting Portal.

QuickBooks Advanced Special Offer.

For a limited time, take advantage of exclusive offer to unlock the power of QuickBooks Advanced to transform how you serve complex clients—while maximizing savings for your firm.

- **50% off for 3 months** - Upgrade existing firm-billed clients via [subscriptions and billing page](#) in QuickBooks Online Accountant.
- **75% off for one year** - Add two or more new firm-billed clients to QuickBooks Advanced. Call 1-877-222-1351 to avail the offer.

**Term and Conditions Apply*

	Simple Start \$38/mo \$19/mo	Essentials \$75/mo \$37.50/mo	Plus \$115/mo \$57.50/mo	Advanced \$275/mo \$137.50/mo
INTUIT AI				
Smart expense organization	✓	✓	✓	✓
Business tax deduction maximizer NEW	✓	✓	✓	✓
Intuit Intelligence chat BETA	25 prompts/mo	25 prompts/mo	25 prompts/mo	25 prompts/mo
Accounting AI	—	✓	✓	✓
Payments AI	—	✓	✓	✓
Sales Tax AI BETA	—	—	✓	✓
Customer AI	—	—	✓	✓
Finance AI	—	—	—	✓
Project Management AI BETA	—	—	—	✓

On-demand Webinar

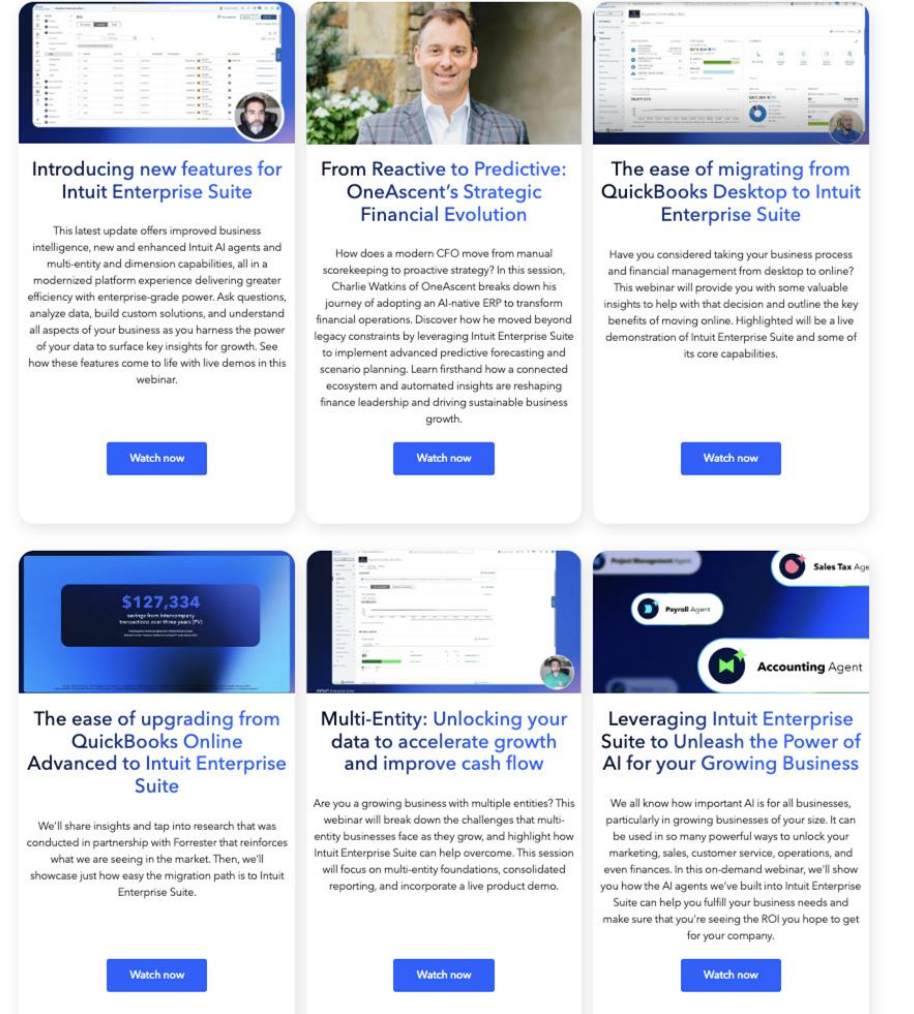
New features for Intuit Enterprise Suite

In this recorded webinar see Intuit Enterprise Suite's latest innovations to **multi-entity capabilities, enhanced business intelligence, and next-gen AI agents**– that will help firms deliver high-impact insights and drive strategic client growth with enterprise-grade efficiency.

Register to watch this webinar (or share it with your clients) and explore a comprehensive library of on-demand webinars

CTA: [Watch now](#)

<https://ieswebinars.intuit.com/hub/ondemand>



Introducing new features for Intuit Enterprise Suite

This latest update offers improved business intelligence, new and enhanced Intuit AI agents and multi-entity and dimension capabilities, all in a modernized platform experience delivering greater efficiency with enterprise-grade power. Ask questions, analyze data, build custom solutions, and understand all aspects of your business as you harness the power of your data to surface key insights for growth. See how these features come to life with live demos in this webinar.

[Watch now](#)

From Reactive to Predictive: OneAscent's Strategic Financial Evolution

How does a modern CFO move from manual scorekeeping to proactive strategy? In this session, Charlie Watkins of OneAscent breaks down his journey of adopting an AI-native ERP to transform financial operations. Discover how he moved beyond legacy constraints by leveraging Intuit Enterprise Suite to implement advanced predictive forecasting and scenario planning. Learn firsthand how a connected ecosystem and automated insights are reshaping finance leadership and driving sustainable business growth.

[Watch now](#)

The ease of migrating from QuickBooks Desktop to Intuit Enterprise Suite

Have you considered taking your business process and financial management from desktop to online? This webinar will provide you with some valuable insights to help with that decision and outline the key benefits of moving online. Highlighted will be a live demonstration of Intuit Enterprise Suite and some of its core capabilities.

[Watch now](#)

The ease of upgrading from QuickBooks Online Advanced to Intuit Enterprise Suite

\$127,334
Average from temporary transactions over three years (FY)

We'll share insights and tap into research that was conducted in partnership with Forrester that reinforces what we are seeing in the market. Then, we'll showcase just how easy the migration path is to Intuit Enterprise Suite.

[Watch now](#)

Multi-Entity: Unlocking your data to accelerate growth and improve cash flow

Are you a growing business with multiple entities? This webinar will break down the challenges that multi-entity businesses face as they grow, and highlight how Intuit Enterprise Suite can help overcome. This session will focus on multi-entity foundations, consolidated reporting, and incorporate a live product demo.

[Watch now](#)

Leveraging Intuit Enterprise Suite to Unleash the Power of AI for your Growing Business

We all know how important AI is for all businesses, particularly in growing businesses of your size. It can be used in so many powerful ways to unlock your marketing, sales, customer service, operations, and even finances. In this on-demand webinar, we'll show you how the AI agents we've built into Intuit Enterprise Suite can help you fulfill your business needs and make sure that you're seeing the ROI you hope to get for your company.

[Watch now](#)

Stop chasing clients for answers: Accounting AI collaboration improvements

No more unassigned, ambiguous requests. Now, you and your clients can **clarify collaboration and get more done as a team.**

Available now for all QuickBooks Online customers, [Accounting AI improvements](#) let you collaborate in new ways to add more efficiency to your work.

- When requesting more info about a transaction, accountants and clients can now assign items to one or more team members. This will allow users replying to requests to see a secure filtered list of questions assigned to the correct person.
- You can also sort and filter the bank feed according to the status of existing transaction requests.
- Learn more about how Accounting AI speeds your workflow: [Watch the demo](#)

The screenshot displays the Intuit QuickBooks Accounting AI interface. The top navigation bar includes the Intuit QuickBooks logo, the user name 'SolarWave', and a search bar. The left sidebar contains navigation options like 'Create', 'Bookmarks', 'Dashboard', 'Feed', 'Reports', 'My apps', 'PINNED', 'Accounting', 'Expenses', 'Sales', and 'Customize'. The main content area is titled 'Bank transactions' and shows a summary for 'Wells Fargo Checking' with a balance of \$4,323.23. Below this, there are three transaction cards for Wells Fargo Checking, Amex Gold, and Alaska Airlines. A table of transactions is displayed with columns for Date, Bank Description, Amount, From/To, Match/Categorize, and Actions. A 'Request more info' dialog box is open over the table, asking 'What additional info or documentation do you need for this transaction?' and providing buttons for 'Ask for more info', 'Ask for receipt', 'View list', 'Add and post', and 'Add request to list'.

Two Webinars. One Clear Path to Intuit Enterprise Suite.

Get the full IES advantage—explore the strategy behind Intuit Enterprise Suite, see real-world migration stories in action, and discover how it's built to power the next stage of growth for complex, scaling clients.

Attend both complementary sessions to understand the *why* behind IES—and the *how* to successfully make the move.

INTUIT
Enterprise Suite

March 24 | IES 🗺️
Strategy + 3 Real Migration Stories (with Furlane)

See why businesses moved from QuickBooks Online, Desktop Desktop Enterprise, and NetSuite – and what their transition to IES looked like in practice.

Register:
<https://intuit.me/furlane-ies-webinar>

March 26 | IES: 🚀
Built for What's Next (with Out of the Box)

Explore the vision behind IES, who it's designed for, and how it supports growing, growing, complex businesses evaluating their next ERP move.

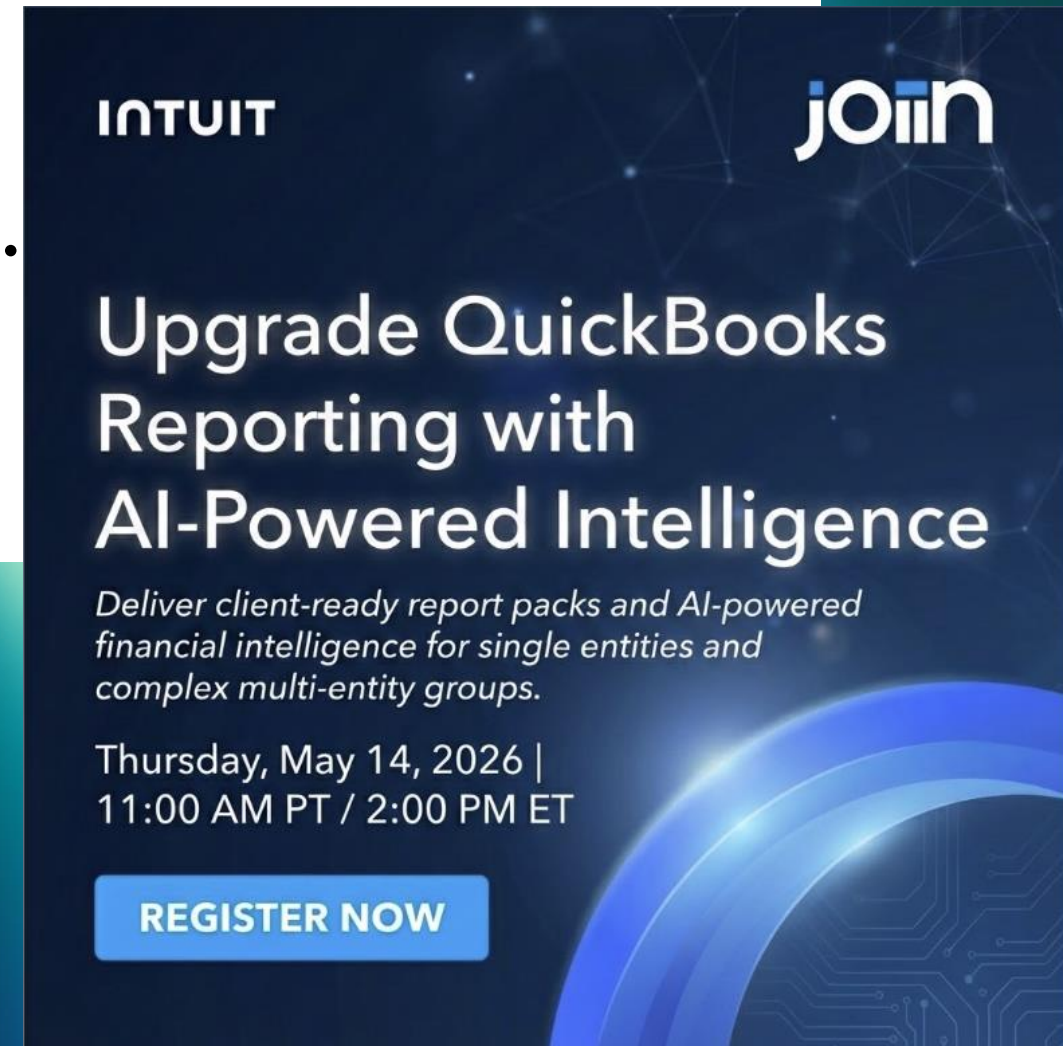
Register:
<https://intuit.me/OOTB-ies-webinar>

Stop Stitching. Start Consolidating. AI-Powered Reporting.

If multi-entity close still means spreadsheet chaos and manual workarounds, there's a better way. Join this live session to see how Joiin layers on top of QuickBooks to automate consolidation, eliminate intercompany noise, and generate board-ready Report Packs – with built-in AI intelligence for summaries, variance commentary, and narrative insight. Turn days of reporting into 30 minutes.

Register now: <https://intuit.me/JoinNow>

Bonus: Earn 1.0 CPE Credit for attending this session.



INTUIT **joiin**

Upgrade QuickBooks Reporting with AI-Powered Intelligence

Deliver client-ready report packs and AI-powered financial intelligence for single entities and complex multi-entity groups.

Thursday, May 14, 2026 |
11:00 AM PT / 2:00 PM ET

REGISTER NOW

QuickBook Payments: New features - coming May '26

- **Payments AI Agent:** This predicts late payments based on customer behavior and sends personalized, non-intrusive nudges.
- **Buy Now, Pay Later (Affirm):** For high-ticket services, clients can offer customers installment plans via Affirm. The merchant gets paid upfront, while Affirm assumes all repayment risk.
- **Tap to Pay on Android:** Turns smartphone into a contactless card reader. It is a zero-hardware solution that allows mobile clients to collect in-person payments instantly.
- **Card on File:** Securely vaults customer payment methods to enable automated recurring payments

Leverage your ProAdvisor discount to help both your firm and your clients save up to 25% on processing costs. Log into QBOA or IAS to add QuickBooks Payments for your clients.



Tap to Pay on Android

Card readers can be a hassle and we're solving that by end of April.

- Get paid on the go with your phone or tablet – no card reader needed
- Transactions sync seamlessly with QuickBooks
- Save on in-person payments fees:
 - *QuickBooks: 2.5%*
 - *Square: 2.6% + 10¢*
 - *Stripe: 2.7% + 15¢*

How do you get started? Download the [QuickBooks Mobile](#) app today.

Notes: QuickBooks Mobile is recommended for business owners and GoPayment is for their team. Tap to Pay on iPhone is already available on QuickBooks mobile and GoPayment.

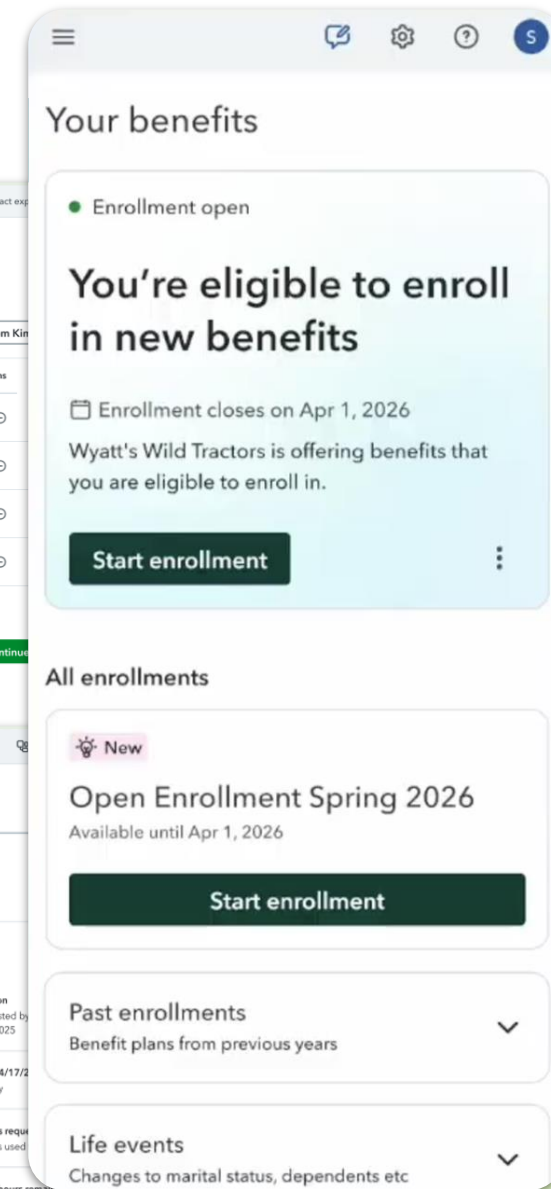
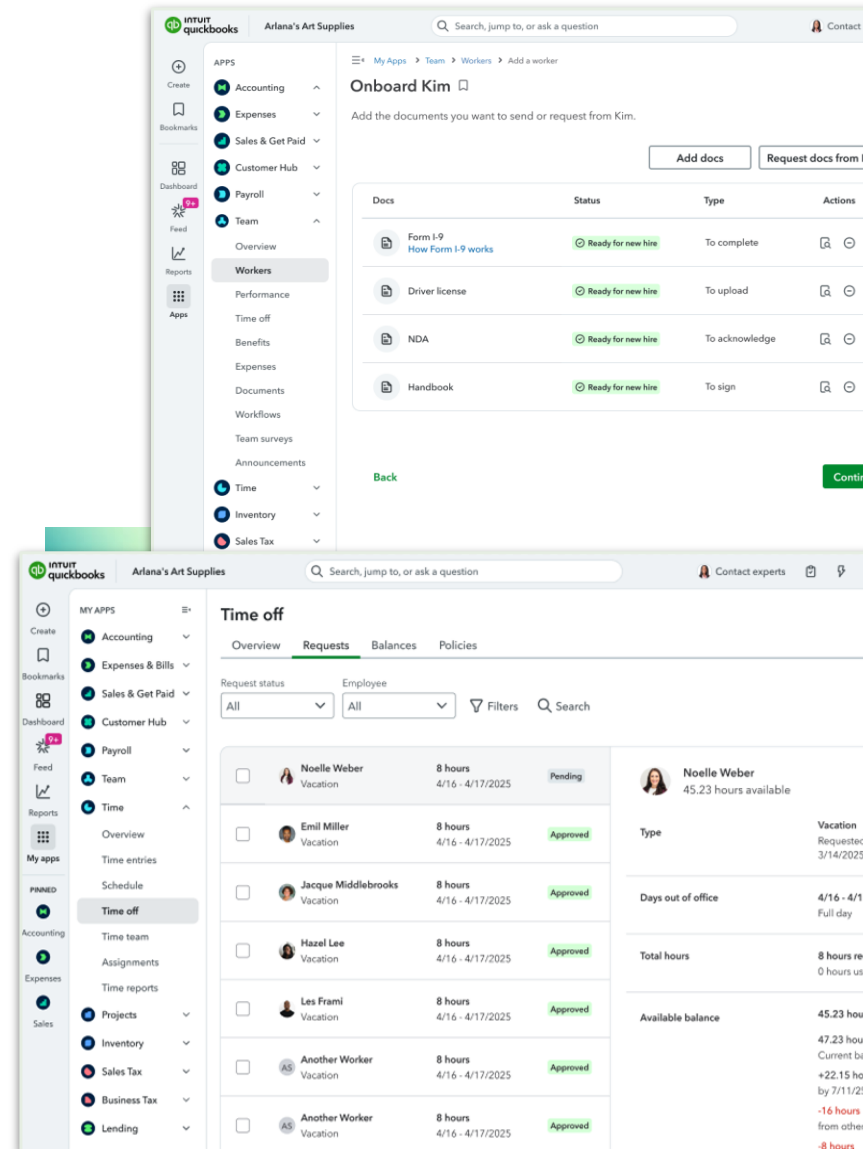


Payroll + HR: Built for Growing Clients

This summer, we are leveling up the payroll solution for your clients using QuickBooks Payroll Premium and Elite.

- **New tools** in Payroll Premium and Elite will be available to manage the entire employee lifecycle, covering talent pipelines, onboarding, time-off, performance, documents, and benefits.
- **Boost efficiency** and save nearly 4 hours each week with payroll, time tracking, and accounting data automatically organized and synced.
- **Strengthen your client relationships** within QuickBooks by expanding into advisory services, staying competitive, and providing value without managing HR risks.

Join our webinar on March 26 at 10am PT to see what's new in QuickBooks Online Payroll.



Product Innovations

Buy Now, Pay Later

Kristin Griffith

Product Marketing

Team: QuickBooks Payments
Location: Bay Area, California



Do any of your clients offer payment plans for their customers (pay-over-time options)?

1

Yes, by breaking down invoices into multiple, smaller payments

2

Yes, through outside pay-over-time platforms (e.g., Klarna, Afterpay, PayPal)

3

No, their invoices are small and/or they don't see a need

4

No, but they would like to offer pay-over-time options

Our Approach

What we heard

- Businesses want to offer multiple payment options to speed their time to paid
- Businesses want confidence they will get paid for the work they complete
- Existing financing options outside of QBO are frustrating to reconcile since the transactions show up as generic payments without context to tie the amount back to the service/product delivered
- Consumers want to have the option to pay over time
- Younger consumers use BNPL as a payment method nearly as frequently as credit cards (44% vs 50%)¹



What we did

Partnered with Affirm to offer Buy Now, Pay Later as a payment option on QuickBooks invoices²

1. Based on a J.D. Power consumer survey of Generation Z consumers, as reported at <https://www.paymentsdive.com/news/gen-z-uses-bnpl-more-than-credit-cards-survey-shows/741139/>.

2. Payment options through Affirm are subject to an eligibility check, may not be available everywhere, and are provided by these lending partners: affirm.com/lenders. For example, a \$1,000 purchase might cost \$90.26/mo over 12 months at 15% APR. Options depend on the purchase amount, and a down payment may be required. For licenses and disclosures, see affirm.com/licenses.

Fast facts

Who

QuickBooks Online Invoicers

When

Rolling out starting March
100% by May

How

Enable BNPL on pay-enabled
Invoices in QBO

Where

US

Turning BNPL on/off on Invoices

The screenshot displays a web interface for managing invoices. The main window is titled "Invoice 1130" and includes navigation options: "Edit", "Email view", "PDF view", and "Payor view". On the right side, there are links for "Manage", "Take a tour", and "Feedback".

The invoice details for "Invoice 1130" are as follows:

- INVOICE**
- Portland Studios
2500 Garcia Ave
Mountain View, CA 94043
[www.portlandstudios.com](#)
- lucyzelp@portlandstudios.com
408-123-4567
[www.portlandstudios.com](#)
- [Edit company](#)

Invoice metadata:

- Invoice no.: 10016
- Terms: Net 30
- Invoice date: 11/20/2025
- Due date: 12/20/2025

Product or Service table:

#	Product/service	Description	Quantity	Rate	Amount
1					

Customer payment options:

- Apple Pay
- VISA
- MasterCard
- discover
- AMEX
- BANK
- PayPal
- venmo
- affirm

Summary table:

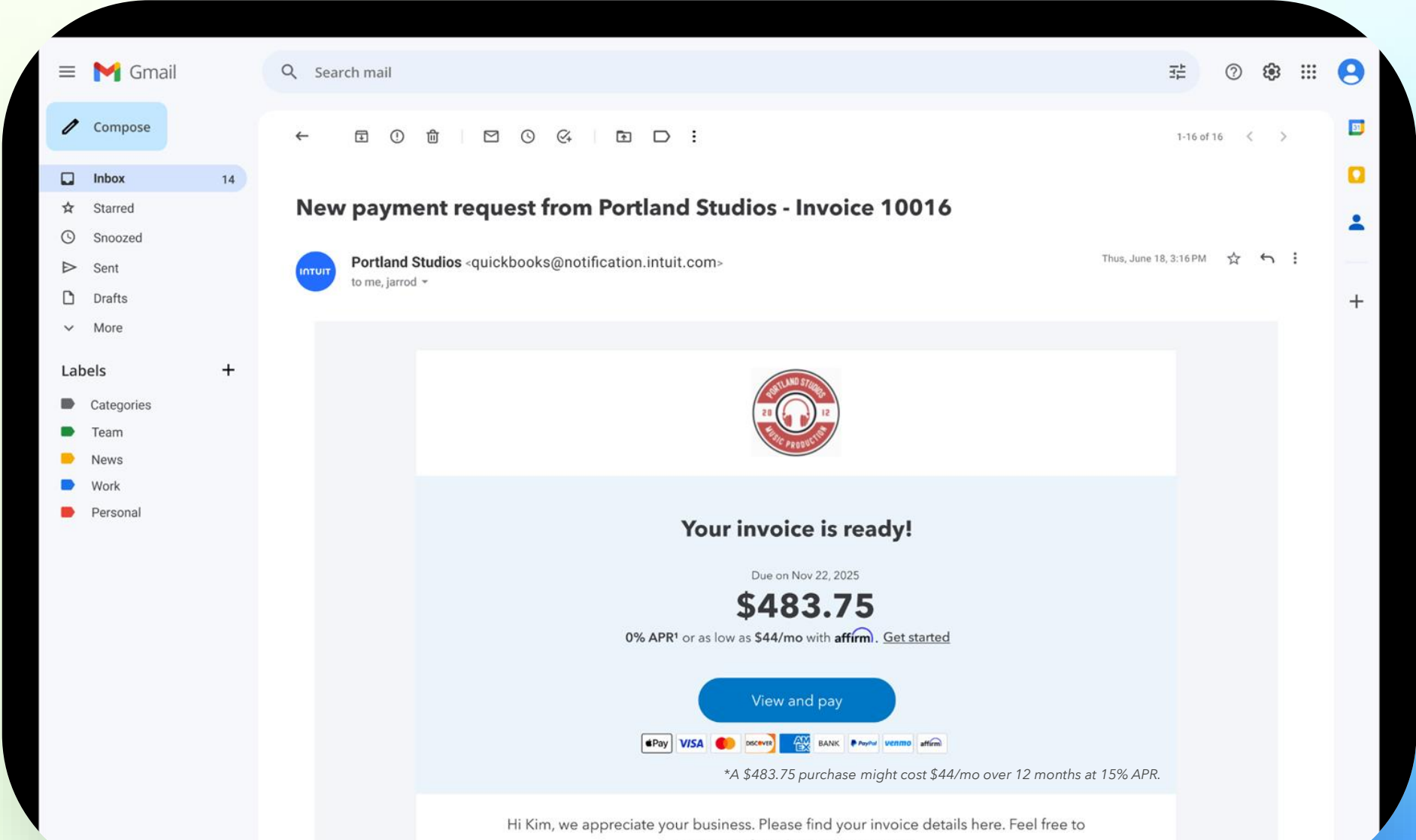
Subtotal	\$0.00
Shipping	\$0.00
Discount	% \$ \$0.00
Sales tax	\$0.00

On the right sidebar, "Invoice 1091" settings are visible, including a "Customization" dropdown and a "Payments" section. The "Payments" section is titled "Your business pays the fee" and includes several payment methods with toggle switches:

- Cards (2.99% per transaction)
- Bank transfer (1% max per transaction)
- PayPal (2.99% per transaction)
- Buy now, pay later (2.99% per transaction) (highlighted with a red box)

Additional options include "Tips" (Manage tips), "Payment details" (Manage), and "More options" (Invoice total).

Client's invoice shows "0% APR, or as low as \$X/mo"



Customer may select Affirm as a payment method

The screenshot displays the Intuit QuickBooks payment interface. At the top left is the Intuit QuickBooks logo, and at the top right is a 'Sign in' button. The main content area is divided into two columns. The left column shows the payment amount as \$483.75, with an 'Edit amount' link. Below this, it states '0% APR or As low as \$44/mo with affirm'. The 'Payment method' section features icons for Debit, Credit, Bank, Affirm (which is highlighted), Apple Pay, and PayPal. A section titled 'Pay your invoice over time' offers '0% APR' and lists benefits: 'No late fees', 'See your plans in seconds', and 'Checking eligibility won't impact your credit'. A 'Tips' section asks the user to show appreciation with a tip, with radio buttons for 5%, 10%, 15%, Other, and None. A large blue button at the bottom of this column says 'Pay over time with affirm'. The right column shows the merchant 'Portland Studios' with invoice details: Invoice 10016, Due date Nov 22, 2025, and Invoice amount \$483.75. A 'Total' of \$483.75 is also shown. Below this is a 'View full invoice' button and download/print icons. The 'Merchant details' section shows the email 'lucyzelp@portlandstudios.com'. The 'Payment instructions' section says 'Thank you for your payment!'. At the bottom right, there is a 'TRUSTe' logo and a lock icon with the text 'Information is protected and kept confidential'. A footnote at the bottom right states '*A \$483.75 purchase might cost \$44/mo over 12 months at 15% APR.'

INTUIT quickbooks Sign in

PAYMENT AMOUNT
\$483.75 [Edit amount](#)

0% APR or As low as \$44/mo with [affirm](#). [Learn more](#)

Payment method

Debit Credit Bank **affirm** Apple Pay PayPal

Pay your invoice over time

0% APR or as low as \$44/mo with [affirm](#). [Learn more](#)

- ✓ No late fees
- ✓ See your plans in seconds
- ✓ Checking eligibility won't impact your credit

Tips

Show this business your appreciation with an optional tip

5% 10% 15% Other None

Pay over time with affirm

Unless prompted for a registered business name at application, Affirm loans are primarily for personal, family, or household use only.

Portland Studios

Invoice 10016
Due date Nov 22, 2025
Invoice amount \$483.75

Total \$483.75

[View full invoice](#)

Merchant details
Email: lucyzelp@portlandstudios.com

Payment instructions
Thank you for your payment!

TRUSTe
Certified Privacy
Information is protected and kept confidential

*A \$483.75 purchase might cost \$44/mo over 12 months at 15% APR.

Customer can choose an Affirm payment plan to fit their budget

The screenshot shows the Intuit QuickBooks interface with an Affirm payment plan modal open. The modal displays a purchase amount of \$483.75 and offers three payment options:

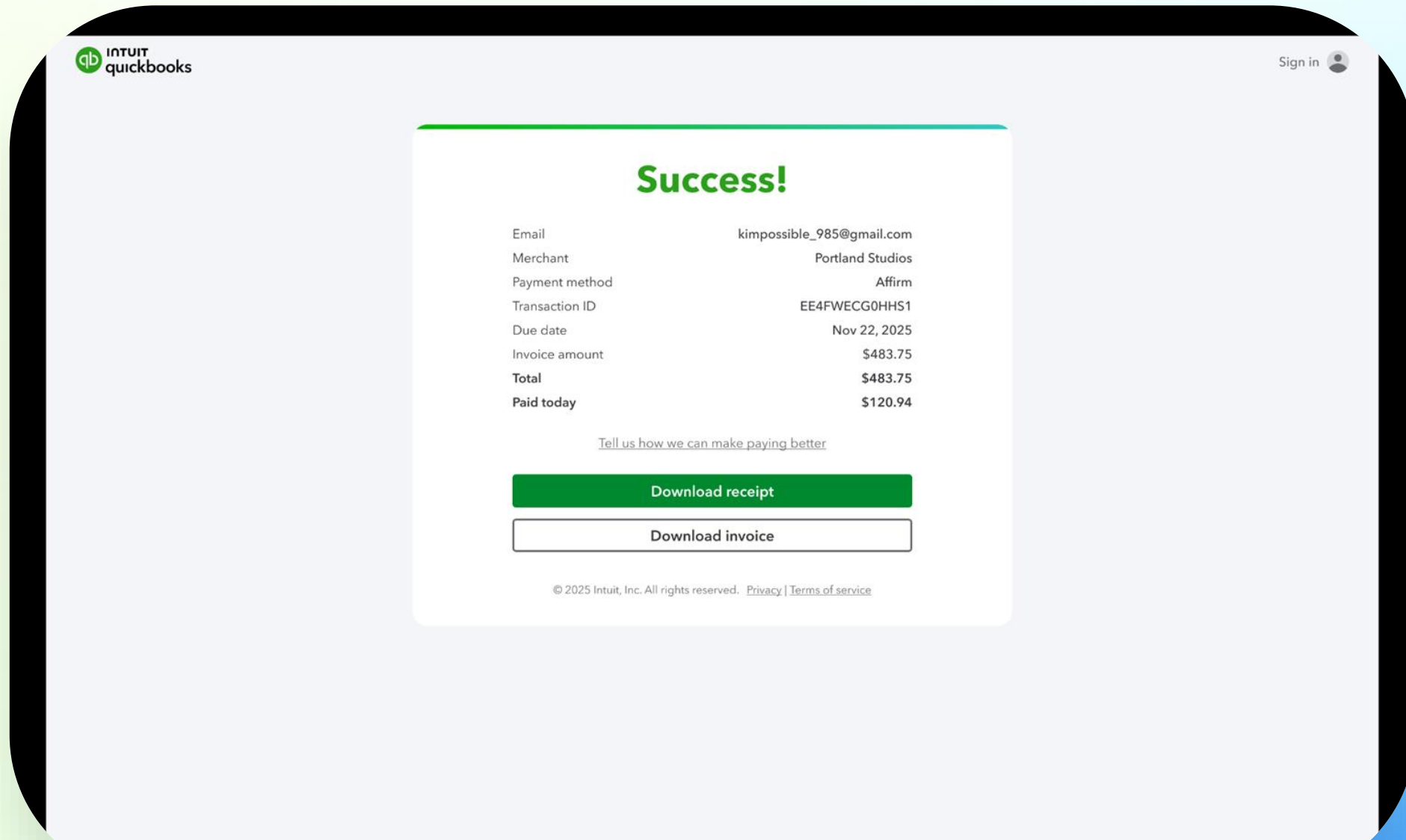
- 0% APR** (Selected): \$120.94 every 2 weeks for 6 weeks, \$0 interest, \$120.94 due today.
- \$84.19 every month for 6 months, \$21.38 interest, \$0 due today.
- Lowest monthly payment**: \$43.66 every month for 12 months, \$40.20 interest, \$0 due today.

The modal also shows a total of payments of \$483.75 and a button to "Choose this plan".

Background Interface:

- Intuit QuickBooks logo in the top left.
- Sign in button in the top right.
- Payment amount: \$483.75.
- Payment method: Debit.
- Pay your invoice: 0% APR.
- Tips: Show this business, 5%.

Your client is paid through Intuit payment rails (typically the next business day: as fast as other payment methods like ACH, CC)



Invoice payment flows through books

The screenshot displays the Intuit QuickBooks interface for 'Tonia's Tapestry'. The left sidebar contains navigation options like 'MY APPS', 'Accounting', 'Expenses & Bills', and 'Sales & Get Paid'. The main area shows a notification about drafted reminders and a table of invoices. A right-hand panel provides details for a selected invoice, including its status, total due amount, dates, customer name, and a timeline of activity.

Notification: I drafted 3 reminders for invoices worth \$1,370.00. You can edit a reminder for Miguel Cervantes and other customers. [Review reminders](#)

	DATE	NO.	CUSTOMER	AMOUNT	STATUS
<input type="checkbox"/>	11/21/225	10016	Kim Possible	\$483.75	✓ D
<input type="checkbox"/>	11/10/25	10130	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	10/28/25	10120	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	10/10/25	10110	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	7/18/25	10100	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	7/10/24	10090	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	6/26/25	10080	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	6/19/25	10070	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	6/12/25	10060	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D
<input type="checkbox"/>	6/10/25	10050	Wilson Sonsini Goodrich Rosati LLP	\$1,380.00	✓ D

Invoice Details:

- Status: Paid (Deposited)
- Total due: **\$483.75**
- Invoice date: 11/10/25
- Due date: 11/22/25
- Customer name: [Kim Possible](#)
- Invoice activity:
 - Sent: 12/12/24, 10:03:58 a.m.
 - Viewed 2 times: 12/12/24, 11:43:23 a.m.
 - Paid: 11/21/25 | Affirm \$483.75 [View payment](#)
 - Deposited: 11/23/225 | Schwab bank, na 1998 \$483.75
- Products and services: [View details](#)

Benefits of BNPL

For you

No workflow changes

Affirm transactions reconcile just like other payments in QuickBooks Online. No added work.

Stabilize client cash flow

Your clients can support customers who don't have the immediate cash on hand to pay the full invoice upfront.

For your client

Get paid upfront

Your client receives payment upfront, while their customer pays Affirm over time.

Get paid fast

Get paid just as fast as other payment types (credit card, ACH).

Zero repayment risk

Affirm assumes the repayment risk from your client's customer.

Affordable rates

Your client pays the standard credit card processing rate.

Spend less time on collections

Affirm handles all payment collection and follow-ups.

No set up required

Affirm will automatically appear as a payment option on your client's invoices.

For your client's customer¹

Flexible payment solutions to fit your life

Customers can access the services they need now and pay over time with flexible payment options.

Support larger transactions

Help customers afford larger purchases by offering a pay-over-time option.

Transparent terms

Delight customers by offering financing that guarantees no hidden fees, compound interest, or late charges.

Customers can check payment options, worry-free

Checking eligibility just takes a minute and won't affect your customer's credit score.



Q&A

Books Close

Hailey Garcia

Product Manager

Team: Intuit Accountant Suite
Location: Mountain View, CA



Have you tried Books Close in Intuit Accountant Suite?

1

Haven't heard of
it

2

Haven't tried it yet

3

Trying it
currently

Books Close

What we heard

ProAdvisors spend a lot of time switching between your firm, your client's QBO, and third party apps to manage your team, track progress, and complete month end close



What we did

We've launched Books Close which allows you to track and work on month end close for all your clients without leaving the Accountant Suite.

- Close dashboard with status and assignees across clients
- Customizable templates and workflows
- AI-powered checks and client collaboration

Fast facts

Who

Accountants using Intuit
Accountant Suite

When

Available now - free beta through July
2026

How

Intuit Accountant Suite > Books
Close add on

Where

US + International

Books Close Live Demo

INTUIT Accountant Suite Garcia and Perez Partners

Books Close overview BETA [Share feedback](#) [Learn more](#)

Books close settings Onboard close client Create close Updated 1 minute ago Customize

Client: All clients | Period: All periods | Assigned to: All assignees | Status: All statuses

Client	Period	Due Date	Bookkeeper	Reviewer	Approver	Status	Action
Kiemly' Cupcakes	March 2026	04/15/2026	Chris Murphy	Laura Thompson	Maggie Kiley	To do	Open
Orellana Treats	February 2026	03/15/2026	Dayna Stacey	Laura Thompson	Lawrence Stansberry	Blocked	Open
Iram's Coffee House	February 2026	03/15/2026	Autumn Gosewisch	Laura Thompson	Lawrence Stansberry	In progress	Open
Ene Espresso	February 2026	03/15/2026	Dan Cheng	Chris Murphy	Lawrence Stansberry	Completed	Open
Kiemly' Cupcakes	February 2026	03/15/2026	Autumn Gosewisch	Laura Thompson	Maggie Kiley	Completed	Open
Cakes by Camila	February 2026	03/15/2026	April Brauer	Autumn Gosewisch	Calvin Witt	Waiting on client	Open
Orellana Treats	January 2026	02/15/2026	Dayna Stacey	Laura Thompson	Lawrence Stansberry	Completed	Open
Ene Espresso	January 2026	02/15/2026	Dan Cheng	Chris Murphy	Lawrence Stansberry	Completed	Open
Iram's Coffee House	January 2026	02/15/2026	Autumn Gosewisch	Laura Thompson	Lawrence Stansberry	Completed	Open
Kiemly' Cupcakes	January 2026	02/15/2026	Autumn Gosewisch	Laura Thompson	Maggie Kiley	Completed	Open
Orellana Treats	December 2025	01/15/2026	Dayna Stacey	Laura Thompson	Lawrence Stansberry	Completed	Open
Iram's Coffee House	December 2025	01/15/2026	Autumn Gosewisch	Laura Thompson	Lawrence Stansberry	Completed	Open



Q&A

Payroll Modernization

Venky Muralidharan

Sr. Staff Product Manager

Team: Services Group - Payroll
Location: Mountain View, CA



Modernized the Run Payroll table for easier data entry and review

What we heard

Customers need too many clicks to enter, review, and submit payroll.

It's not easy to filter, search, and sort employees. Often customers perform the same action repetitively needing time and effort to run payroll for big employers.



What we did

Moved the Run Payroll experience to a new table that allows filtering, searching, sorting, and take bulk actions minimizing the number of clicks and amount of scroll needed to complete payroll.

Fast facts

Who

Customers using QuickBooks Payroll
in US and Canada

When

All customers will see it starting May 2026.
The initial release is out to < 1000 customers
as of today.

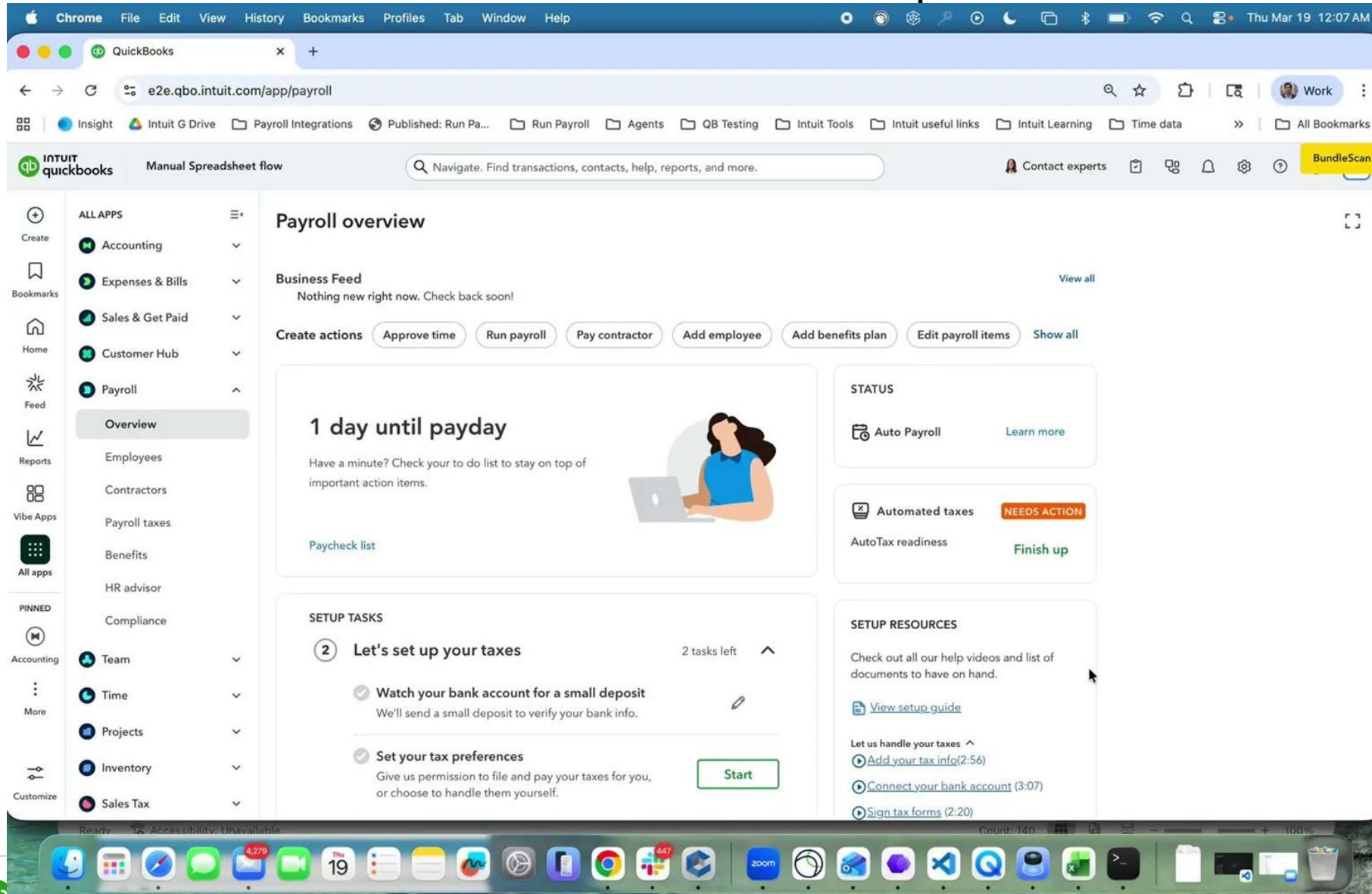
How

Run Payroll on Payroll Overview and
Employees tab

Where

US and Canada

Video demo of the end-to-end experience



Change to the checkbox behavior in Run Payroll to now allow bulk actions

Run payroll: Every Friday

Take a tour Switch to classic view Give feedback ? X

Pay period: 03/19/2026 to 03/25/2026
Pay date: 03/27/2026

+ Add an employee Edit classes & projects

2 employees selected
Skip from payroll run Change payment method Write memo X

Customize

Employees	Status	Salary	Regular pay	Paid time off	Overtime	Commission	Vacation pay	Holiday pay	Total hrs	Gross pay	Cash tips
<input type="checkbox"/> Calafiori, Riccardo \$53,000.00/year	Included <input checked="" type="checkbox"/>	\$1,019.23 40h		0h	0h		0h	0h	40h	\$1,019.23	\$0.00
<input type="checkbox"/> Fabregas, Cesc Commission	Skipped <input type="checkbox"/>	Cesc is skipped from this payroll run. Add to payroll run									
<input type="checkbox"/> Magalhaes, Gabriel \$50,000.00/year	Skipped <input type="checkbox"/>	Gabriel is skipped from this payroll run. Add to payroll run									
<input type="checkbox"/> Mosquera, Christian \$50,000.00/year	Included <input checked="" type="checkbox"/>	\$961.54 40h			0h			0h	40h	\$961.54	
<input checked="" type="checkbox"/> Muralidharan, Vengatesh Hourly	Included <input checked="" type="checkbox"/>	-	40h		0h				40h	\$2,000.00	
<input checked="" type="checkbox"/> Norgaard, Christian \$50,000.00/year	Included <input checked="" type="checkbox"/>	\$961.54 40h			0h			0h	40h	\$961.54	

Cancel

Smart Review

Save for later

Preview for 11 employees

What steps do you take repetitively across multiple employees that could be a bulk action in Run Payroll screen?

1

Change payment method

2

Skip deductions

3

Assign class or project

4

Write memo

5

Other (type your answer in the Q&A)



Q&A

Bill Pay: Greater Efficiency and More Controls

Jorge Cardenas Willen

Product Marketing

Team: QuickBooks Bill Pay

Location: Seattle, Washington



How do you typically sign-up your clients today for additional services, such as QuickBooks Bill Pay (can only choose one)?

1

At initial set up - when I am setting up a new client in QuickBooks Online Accountant ['Add Client']

2

I only add services for clients, when they need them, after they have created a QuickBooks online account, and I do it in QuickBooks Online Accountant

3

Anytime I see the need - I add it when setting up a new client or for existing clients through QuickBooks Online Accountant.

4

I either go into their QuickBooks account and sign them up directly or I recommend they log into QuickBooks and sign themselves up.

Increase Efficiency & Control with Bill Pay

What we heard

ProAdvisors want more ways to further streamline their AP process – they require more controls with Bill Pay and want to be able to process more bills at one time.



What we did

We've released new features that take Bill Pay further.

- Parallel Approvals
- Bulk Pay up to 50
- Recurring Bill Payment "Auto Pay"

Fast facts

Who

Accountants & their clients with a QuickBooks Online Subscription

When

Live as of 3/2026

How

Enables via workflows setup or while scheduling a bill payment

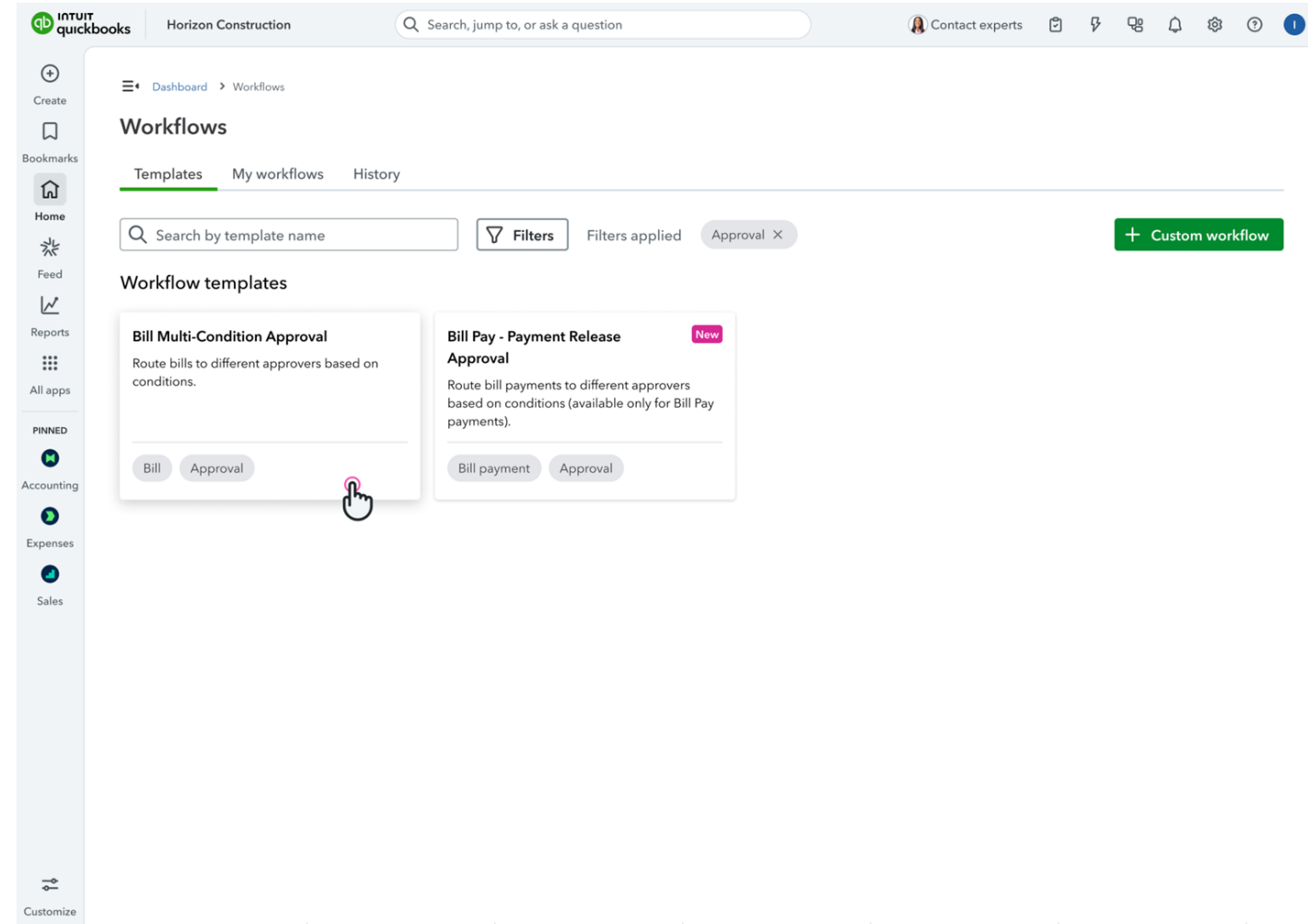
Where

US

NEW: Parallel & Group Approvals

Not only do you have 2 approval workflows with Bill Pay Elite, but now you also have Parallel, Group and Sequential approvals.

- Enable in either Bill Approval or Bill Payment Approval Release workflows
- Have upto 7 people in a group and 5 levels of approvals
- Audit trails are created in each step



NEW: Parallel & Group Approvals

Create a workflow ✕

Invoice approval

Start

Workflow started by event
Invoice is created/updated

When this happens
Invoice is greater than 1000

✓ Yes ✗ No

Add

Stop

Do this

Request approval

Approvers

1. Select one or more approvers... Anyone approves

+ Add sequential approvers

Notify via

Task ? Edit

Email ? Edit

Delete Cancel Save

Stop

Cancel

Publish as template

Save and turn on ▼

NEW: Parallel & Group Approvals

Create a workflow ✕

Invoice approval

Start

Workflow started by event
Invoice is created/updated

When this happens
Invoice is greater than 1000

Yes No

Do this

Request approval

Approvers

1. Adam Young, Lina Chu and 1 more

+ Add sequential approvers

Notify via

Task Email

Select...

Anyone approves
Any 2 people approve
All users approve

Delete Cancel Save

Stop

Cancel Publish as template Save and turn on

NEW: Parallel & Group Approvals

Create a workflow ✕

Invoice approval

Start

Workflow started by event
Invoice is created/updated

When this happens
Invoice is greater than 1000

✓ Yes ✗ No

Do this

Request approval

Approvers

- Adam Young, Lina Chu and 1 more | All users approve
- Select one or more approvers... | Anyone approves

+ Add sequential approvers

Notify via

- Task
- Email

Delete Cancel Save

Add Stop

Cancel Publish as template Save and turn on

NEW: Parallel & Group Approvals

Create a workflow ✕

Invoice approval

Do this

Request approval

Approvers

- Adam Young, Lina Chu and 1 more | All users approve
- Nathan Lee, Casey Lauren and 1 more | Anyone approves
- Avril Land, Kyle Gilmore and 1 more | Any 2 people approve

+ Add sequential approvers

Notify via

- Task
- Email

Cancel Save

Cancel Publish as template Save and turn on

NEW: Parallel & Group Approvals

Bill PENDING APPROVAL Copy Give feedback Settings Help Close

Vendor: Dennis Turner BALANCE DUE **\$15,000.00** Mark as paid

Dennis Turner Bill Pay BANK OF AMERICA, N.A. (...9701)

Mailing address: Dennis Turner, 52232 Gutkowski Glen, Cassinshire, Wyoming 79151, USA

Terms: [Dropdown] Bill date: 01/27/2026 Due date: 01/27/2026 Bill no. [Input]

Approval status

- Emily Wilson approved
- Emily Wilson approved on 01/27/2026 10:01 AM
- Sequential approval of anyone by Chen Wei

#	CATEGORY	DESCRIPTION	AMOUNT
1	Uncategorized Expense		\$15,000.00
2			
Total			\$15,000.00

Memo: [Text Area] Attachments: Add attachment (Max file size: 20 MB) Show existing Privacy

Cancel Print More Reject Approve

Bill APPROVED Copy Give feedback Settings Help Close

Vendor: Dennis Turner BALANCE DUE **\$15,000.00** Schedule online payment Mark as paid

Dennis Turner BANK OF AMERICA, N.A. (...9701)

Mailing address: Dennis Turner, 52232 Gutkowski Glen, Cassinshire, Wyoming 79151, USA

Terms: [Dropdown] Bill date: 01/27/2026 Due date: 01/27/2026 Bill no. [Input]

Approval status

- Emily Wilson approved
- Emily Wilson approved on 01/27/2026 09:01 AM

#	CATEGORY	DESCRIPTION	AMOUNT
1	Uncategorized Expense		\$15,000.00
2			
Total			\$15,000.00

Memo: [Text Area] Attachments: Add attachment (Max file size: 20 MB) Show existing Privacy

Cancel Print More Save Save and new

NEW: Parallel & Group Approvals

INTUIT quickbooks | Arlana's Art Supplies | Search, jump to, or ask a question | Contact experts

Expenses & Bills / Bill payments / Payments | Feedback | Tour | Tutorial

Bill payments

Pending approval (13) **NEW** | Payments

Vendor: All | Amount: All amounts | Filters | Search | Customize

Vendor	Bill no.	Withdrawal date	Approvers	Paid from	Payment method	Payment amount	Action
AG gardens	3 Bills	Date passed	Adam and 3 more	Chase checking (...1234)	ACH	\$10,000.00	Copy link for approver
Just Do It LLC	123456	03/17/2025 Today				\$10,000.00	Copy link for approver
Barnett Design	6 Bills	04/2/2025				\$5,000.00	View details
IL Junk Haulers	2 Bills	04/2/2025			check	\$40,000.01	View details

Bill payment approval status

- Adam, Lina and Alex approved
 - Adam Young approved on 11/13/2025, 11:00 AM.
 - Lina Chu approved on 11/13/2025, 2:00 PM.
 - Alex McCrea approved on 11/13/2025, 3:34 PM.
- Pending approval from any 3 people
 - Nathan Lee, Casey Lauren or Jim Gordon
- Sequential approval from any 2 people
 - Avril Land, Kyle Gilmore and Mike Frederiksberg

View payment | Help

Scheduled Processing Delivered

Payment scheduled

Your \$502.50 payment to Barnett Lawn Care is scheduled for 5/1/2023.

Approvers | Last approved by Mike Frederiksberg

Pay to vendor

Processing fee (if applicable)
No fees apply to the first 5 ACH payments.

Pay from

Withdrawal date

Deliver to
Barnett Lawn Care
Citibank Checking (...6600)

Estimated delivery date ⓘ | 05/01/2023

You can cancel this payment | [Cancel payment](#)

Note to vendor
This text is an example of a 140-character paragraph that serves as a reminder of the limit we have when we need to convey a short message.

Bills included in this payment (18) | [Show](#)

Need help with this payment?
Select Help to get a callback from an expert. We may ask you for the reference ID: 43645147674046

[Terms of Service](#)

Done

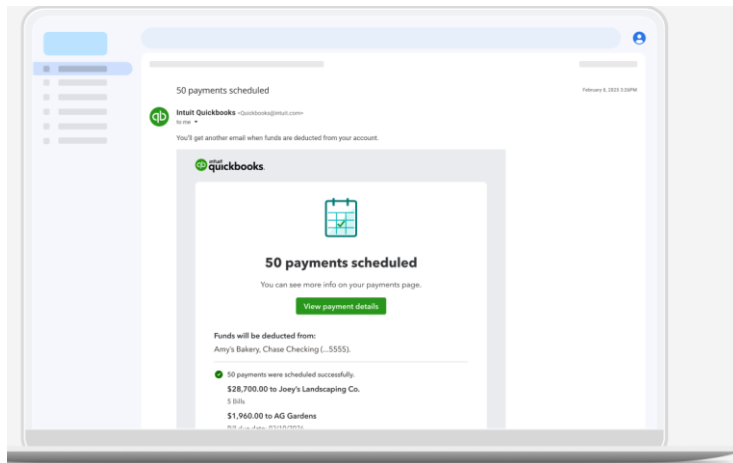
Payment approval status

- Adam, Lina and Alex approved
 - Adam Young approved on 11/13/2025, 11:00 AM.
 - Lina Chu approved on 11/13/2025, 2:00 PM.
 - Alex McCrea approved on 11/13/2025, 3:34 PM.
- Nathan Lee approved
 - Nathan Lee approved on 11/13/2025, 11:00 AM.
- Avril and Mike approved
 - Avril Land approved on 11/13/2025, 11:00 AM.
 - Mike Frederiksberg approved on 11/13/2025, 2:00 PM.

NEW: Bulk Payment upto 50

Bill Pay Premium & Elite Customers:

- Bulk pay upto 50 bills at one time
- Simply select from unpaid tab
- Customize Bill Date, Type of Payment, Deliver date, Speed of Payment



The screenshot shows the desktop interface of Intuit QuickBooks. The main heading is "Bills". A notification banner states: "NEW You can now pay up to 50 bills at the same time. Save time by scheduling more bills at once. Got it". Below this, there is a search bar and a "Pay bills" button. A confirmation overlay is displayed in the center, showing: "Total: \$112,000.00 (50 bills selected). You can schedule up to 50 bills at a time." with "Schedule payment" and "Delete" buttons. Below the overlay is a table of bills.

Bill date	Amount	Status	Bill amount	Actions			
All dates	All amounts	Filters	Search	Customize			
✓	Mavy's Designs	JPMORGANCHA...	01/31/2026	02/07/2026	Due soon Due in 2 days	\$5,000.00	Schedule payment
✓	Mavy's Designs	JPMORGANCHA...	01/31/2026	02/07/2026	Due soon Due in 2 days	\$5,000.00	Schedule payment
✓	Mavy's Designs	JPMORGANCHA...	01/31/2026	02/07/2026	Due soon Due in 2 days	\$2,000.00	Schedule payment
✓	Brinnand & Assoc...	WELLSFARGO...1...	01/31/2026	02/07/2026	Due soon Due in 2 days	\$6,000.00	Schedule payment

NEW: Recurring Payments

You can now create a new recurring bill payment and activate the new 'Auto-Pay' feature

- Create a new recurring bill template
- Fill in Bill details
- Fill in payment details
- Receive email notification
- Track & manage recurring bills

Soon you can activate a recurring bill payment via Intuit Intelligence!

The screenshot shows the Intuit QuickBooks interface for a user named 'Spark Construction & Solar'. The main navigation menu on the left includes 'MY APPS' (Accounting, Expenses & Bills, Overview, Expense transactions, Vendors, Bills, Bill payments, Mileage, Expense claims, Contractors, 1099s), 'PINNED' (Sales & Get Paid, Customer Hub, Team, Time, Projects, Inventory, Sales Tax, Business Tax, Lending), and 'EXPENSES' (Payroll, Marketing). The 'Bills' page is active, showing a 'Recurring' tab highlighted in pink. A dropdown menu is open from the 'Add bill' button, showing options: 'Create bill', 'Create recurring bill', and 'Upload multiple bills'. The table below lists four recurring bills:

Template name	Vendor	Interval	Previous date	Next date	Autopay	Amount	Action
Michael Scott monthly	Michael Scott	Every month	03/01/2025	04/01/2025	OFF	\$1500.00	Turn autopay on
James K monthly	James K	Every month	03/01/2025	04/01/2025	OFF	\$1000.00	Turn autopay on
John Doe	John Doe	Every month	03/01/2025	04/01/2025	OFF	\$1200.00	Turn autopay on
Amy Wong	Amy Wong	Every month	03/01/2025	04/01/2025	OFF	\$1200.00	Turn autopay on

At the bottom right of the table, it says '1-4 of 4 items' and 'Page 1 of 1'.

NEW: Recurring Payments

The screenshot displays the Intuit QuickBooks Business Feed for 'Arlana's Art Supplies'. The interface includes a sidebar with navigation options like 'Create', 'Bookmarks', 'Home', 'Feed', 'Reports', 'All apps', 'Accounting', 'Expenses', 'Sales', and 'Customize'. The main content area features a 'Business Feed' section with a notification: 'Recurring bill found' with a sub-header 'Review and turn on autopay'. The notification text states: 'You pay this bill regularly for similar amounts. I've prepared a recurring bill template for you to review.' Below this is a table with the following data:

Vendor	Category	Interval	Amount	Action
Alex's flooring supplies	Supplies	Monthly	\$1,000.00	Review

Below the table are 'Hide details' and 'Review' buttons. To the right is an 'Upload & create' section with a 'Document upload' area and a 'Select a file or drag and drop here' box. Further right is the 'Intuit Assist Agents' section, listing three active agents: Accounting Agent, Payments Agent, and Customer Agent. Below the feed is a 'Cash flow insight' section with the text: 'Based on your connected accounts, it looks like your cash flow might be trending low. A no-fee QuickBooks Line of Credit could help. 1'. It includes a 'Cash flow by month' bar chart showing positive flow in Jan and negative flow in Feb and Mar. Below the chart are 'Options' with two suggestions: 'You may be eligible for a QuickBooks Line of Credit to bridge cash flow gaps.' with an 'Explore funding' button, and 'Consider sending reminders for 4 overdue invoices worth \$3,056.23.' with a 'Send reminders' button. A footnote at the bottom states: '*Interest will apply. QuickBooks Line of Credit loans are issued by WebBank. See terms and conditions.'

NEW: Recurring Payments

Bill Opt out Give feedback ? ⚙️ ✕

Autofill this bill BETA ✕

Drag and drop documents anywhere in the dotted lines or select another option

Supported formats: PDF, PNG, JPEG

Select file Snap photo

Recurring Bill

Template name: Type: Create days in advance

Vendor:

Mailing address: Terms:

Interval: on of every month(s) Start date: End:

Autopay NEW Autopay is here!

Payment withdrawal dates will be scheduled according to the bill interval and terms (same date or next business day). Save time by turning on autopay for your recurring bill. Got it

Tags Manage tags

#	CATEGORY	DESCRIPTION	AMOUNT	
1	Rent:Building & land rent		\$1,000.00	
2				

Add lines Clear all lines Total \$1,000.00

Cancel Clear Save template

Review before you save. Important information about how we use generative AI.

NEW: Recurring Payments

Bill Opt out Give feedback ? ⚙️ ✕

Autofill this bill BETA ✕

Drag and drop documents anywhere in the dotted lines or select another option

Supported formats: PDF, PNG, JPEG

Select file Snap photo

Review before you save.
[Important information about how we use generative AI.](#)

Cancel Clear Continue

Recurring Bill

Template name: Type: Create days in advance

Vendor:

Mailing address:
 Terms:

Interval: on of every months(s) Start date: End:

Autopay NEW

Payment withdrawal dates will be scheduled according to the bill interval and terms (same date or next business day).

Pay from: Payment method: Note to vendor:

🔄 The next payment is scheduled for **03/01/2025**. The estimated delivery date is **03/05/2025**. [View upcoming payments](#)

Tags ⓘ Manage tags

NEW: Recurring Payments

Bill

Autofill this bill BETA X

Drag and drop documents anywhere in the dotted lines or select another option

Supported formats: PDF, PNG, JPEG

Select file **Snap photo**

Recurring Bill

Template name: Alex's monthly | Type: Scheduled | Create: days in advance

Vendor: Alex's Flooring Supplies

Mailing address: 1st main street, Irvine, CA 92603-3530 US | Terms:

Interval: Monthly on day 1st of every 1 month(s) | Start date: MM/DD/YY... | End: None

Autopay NEW

Payment withdrawal dates will be scheduled according to the bill interval and terms (same date or next business day).

Pay from: BANK OF AMERICA, N.A. (...5316) | Payment method: ACH payment ... 3137 | Note to vendor: Hi Alex, this is your monthly rent pay

The next payment is scheduled for 03/01/2025. The estimated delivery date is 03/05/2025. [View upcoming payments](#)

Tags: [Manage tags](#)

[Cancel](#) [Clear](#)

Bill payments

Review and schedule

Pay from: BANK OF AMERICA, N.A. (...5316)

Interval	Every month
First payment date	03/01/2025
Last payment date	Until canceled
Processing fee for ACH payments (if applicable)	\$0.50 each

Total payment amount **\$1,000.00**
\$0.50 fee may apply

Payment Authorization

By selecting Save and schedule payments, I authorize Intuit to withdraw funds from my account and deliver this payment to the vendor specified. I verify that the amount of funds to be paid is correct. I understand the vendor may change the delivery method for this payment but my withdrawal date will not change.

[Save and schedule payments](#)

NEW: Recurring Payments

The screenshot displays the Intuit QuickBooks interface for 'Arlana's Art Supplies'. The main content area is titled 'Bills' and shows a list of bills for review. The interface includes a sidebar with navigation options like 'MY APPS', 'Accounting', 'Expenses & Bills', and 'Bills'. The bills table has columns for Vendor, Bill Date, Due Date, Bill Amount, and Action. The 'Paid' tab is selected, and the filter is set to 'Last 12 months'. There are 10 items in the list, with the first one being a recurring bill for Alex's Flooring Supplies.

VENDOR	BILL DATE	DUE DATE	BILL AMOUNT	ACTION
Alex's Flooring Supplies	03/20/2025	03/20/2025	\$1,000.00	Show payments
SpeedClean	03/10/2025	03/10/2025	\$80.00	Show payments
Barnett Lawn	03/06/2025	03/06/2025	\$23,020.00	Show payments
Poe Paper and Supplies	02/26/2025	02/30/2025	\$1,040.15	Show payments
Red Ocean	02/22/2025	02/22/2025	\$14,080.00	Show payments
Amy's Bakery	02/12/2025	02/16/2025	\$2,220.00	Show payments
Li Foods corporation	01/26/2025	01/30/2025	\$1,500.30	Show payments
Jeff's Jalopies	01/26/2025	01/26/2025	\$780.00	Show payments
Jones Pizzeria	01/18/2025	01/21/2025	\$1,040.15	Show payments
SpeedClean	01/14/2025	01/16/2025	\$2,220.00	Show payments

NEW: Recurring Payments

The screenshot shows the Intuit QuickBooks interface for 'Arlana's Art Supplies'. The main navigation menu on the left includes 'MY APPS' (Accounting, Expenses & Bills), 'PINNED' (Sales & Get Paid, Customer Hub, Marketing, Payroll, Team, Time, Projects, Inventory, Sales Tax, Business Tax, Lending), and 'Customize' (Payroll, Marketing). The 'Expenses & Bills' section is active, showing 'Recurring bills'.

Recurring bills found
Review and turn on autopay

You pay this bill for Alex's flooring supplies regularly for similar amounts. I've prepared a recurring bill template for you to review. [Show details](#)

[Create recurring bill](#)

[Review](#)

Vendor: All vendors Filters

Template name	Vendor	Interval	Previous date	Next date	Autopay	Amount	Action
Alex's monthly	Alex's Flooring Supplies	Every month		03/20/2025	ON	\$1,000.00	Edit
Michael Scott monthly	Michael Scott	Every month	03/01/2025	04/01/2025	OFF	\$1500.00	Turn autopay on
James K monthly	James K	Every month	03/01/2025	04/01/2025	OFF	\$1000.00	Turn autopay on
John Doe	John Doe	Every month	03/01/2025	04/01/2025	OFF	\$1200.00	Turn autopay on
Amy Wong	Amy Wong	Every month	03/01/2025	04/01/2025	OFF	\$1200.00	Turn autopay on

1-4 of 4 items < Page 1 of 1 >

NEW: New Promo Coming Soon

Limited-Time Offer: 90% Off QuickBooks Bill Pay

Premium and Elite Plans

90% OFF
for 12 months



Unlock Key Features

- Bill Approval Workflows
- Bill Payment Release Workflows
- Parallel and group approvals
- Bulk Pay upto 50 at one time
- 2 day ACH speed

Sign up your clients today through QuickBooks Online Accountant.

intuit.



Q&A

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

QuickBooks
Payments

2

QuickBooks
Payroll

3

QuickBooks Bill
Pay

4

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

What's around the corner?

On the books schedule

Be sure to check out these recent episodes:

- Randy Crabtree - Mental Health in Accounting Part 1
- Upskilling 1 Million Accountants in Five Years
- Dave Olson Building Trust and Scaling with Intention in an AI-world

And be sure to check out these upcoming episodes:

- Mental Health in Accounting Part 2
- Why has Intuit moved to quarterly releases?

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



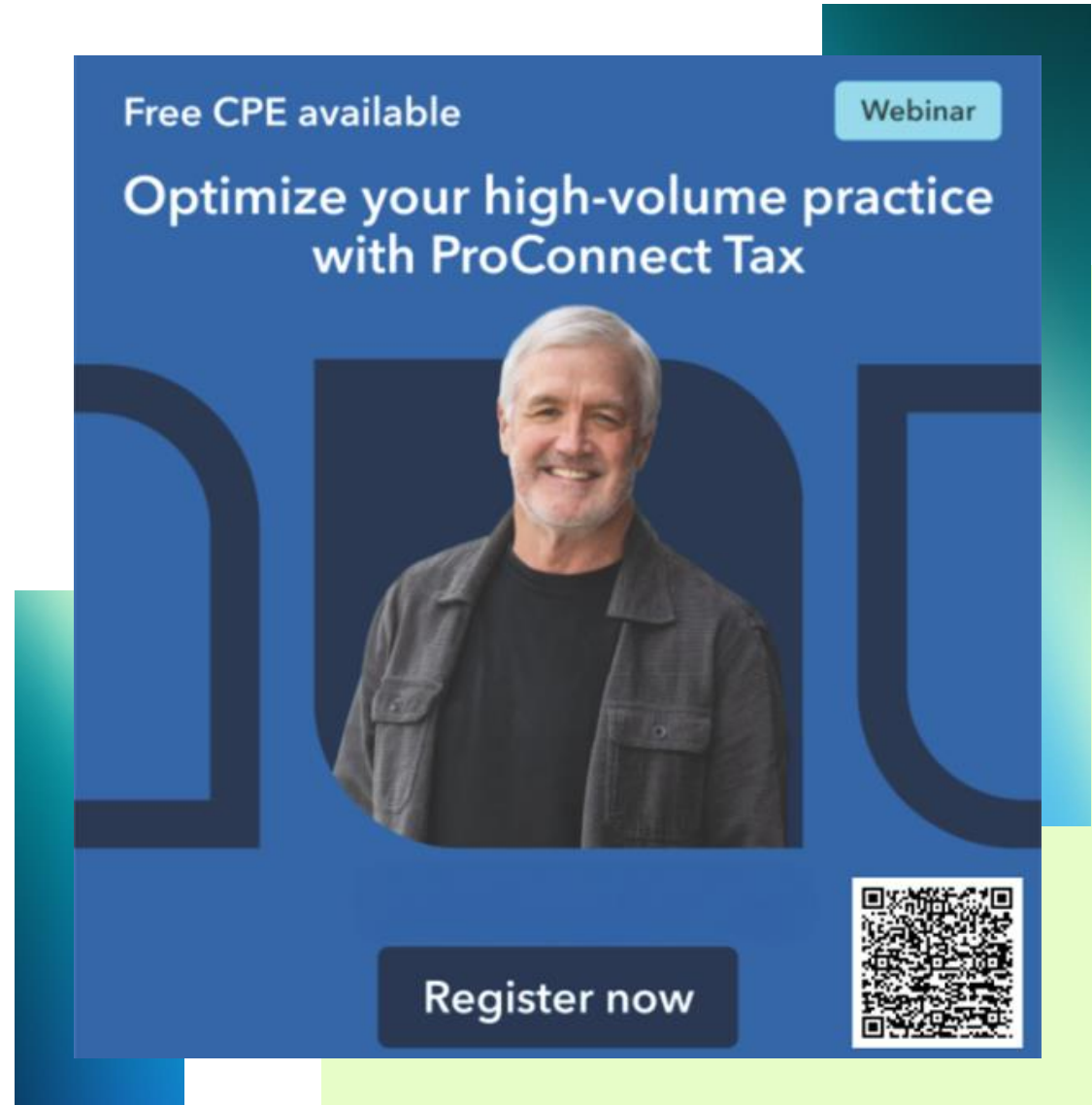
Webinar

Optimize your high-volume practice with ProConnect Tax

Join us on April 1, 2026 at 10 AM PT to see why high-volume tax firms are thriving with ProConnect Tax.

You'll learn how to:

- Use ProConnect's latest features and cloud-based workflows to stay efficient and accurate
- Seamlessly connect books to tax to advisory for your firm
- Reduce manual work and maintain control and visibility across your firm



The graphic is a blue rectangular banner with a white border. At the top left, it says "Free CPE available". At the top right, there is a small blue box with the word "Webinar" in white. The main title in the center reads "Optimize your high-volume practice with ProConnect Tax". Below the title is a portrait of a smiling man with grey hair, wearing a dark jacket over a black shirt. At the bottom center, there is a dark blue button with the text "Register now" in white. At the bottom right, there is a QR code.

Our next webinar will be in May 2026

Date:
May 21, 2026

Time:
11am PST / 2pm EST

[Register](#)

INTUIT ProAdvisor
IN THE
KNOW

Thank you