INTUIT ProAdvisor

IN THE KNOW

INTUIT ProAdvisor

IN THE KNOW

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Your host today

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

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Agenda

ProAdvisor community news

Intuit Enterprise Suite Certification

Training Management Dashboard: Assign

Product innovations

Intuit Enterprise Suite release

Intuit Intelligence

Intuit Accountant Suite: User Groups

What's around the corner

Intuit Connect On

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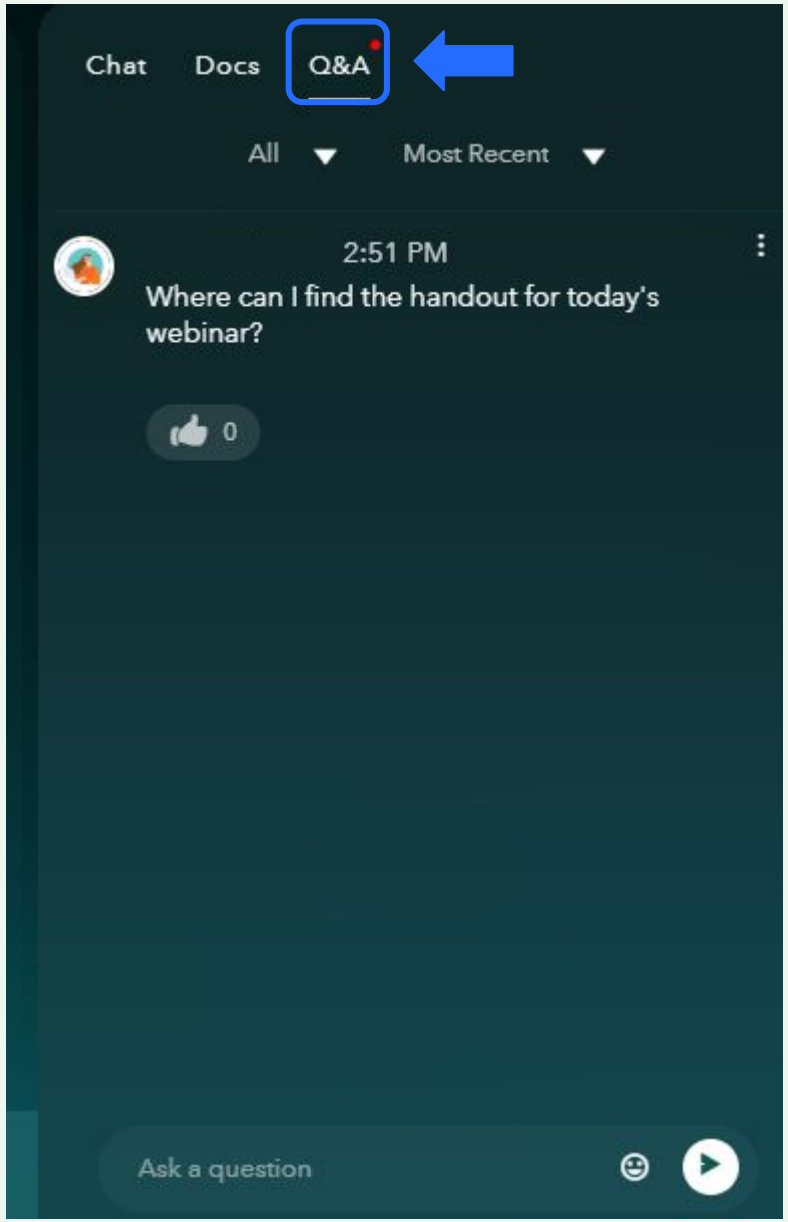
Questions & feedback

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.



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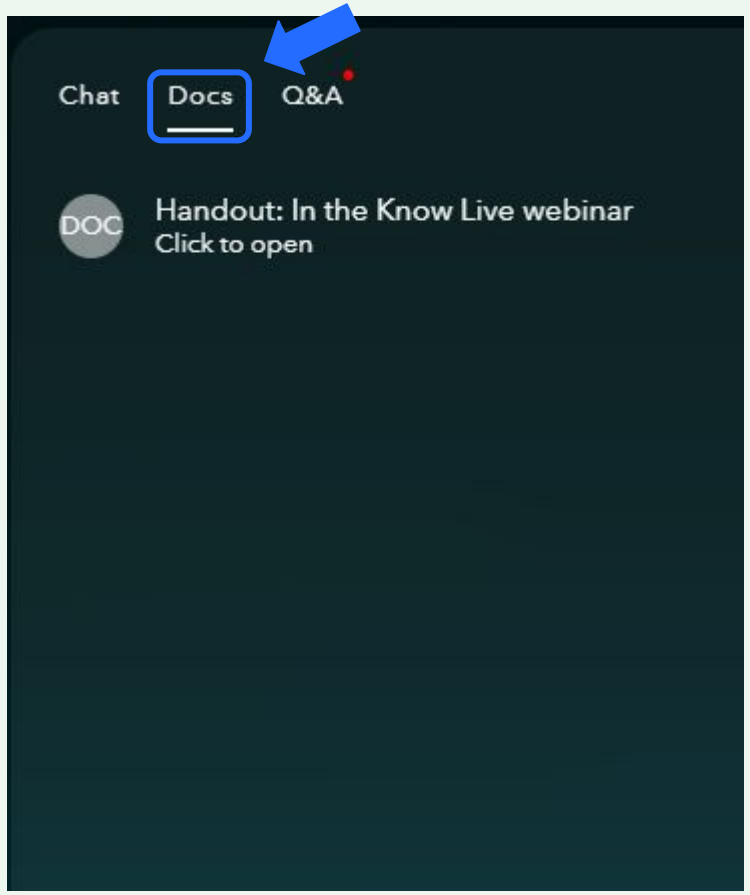
Supporting materials

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.



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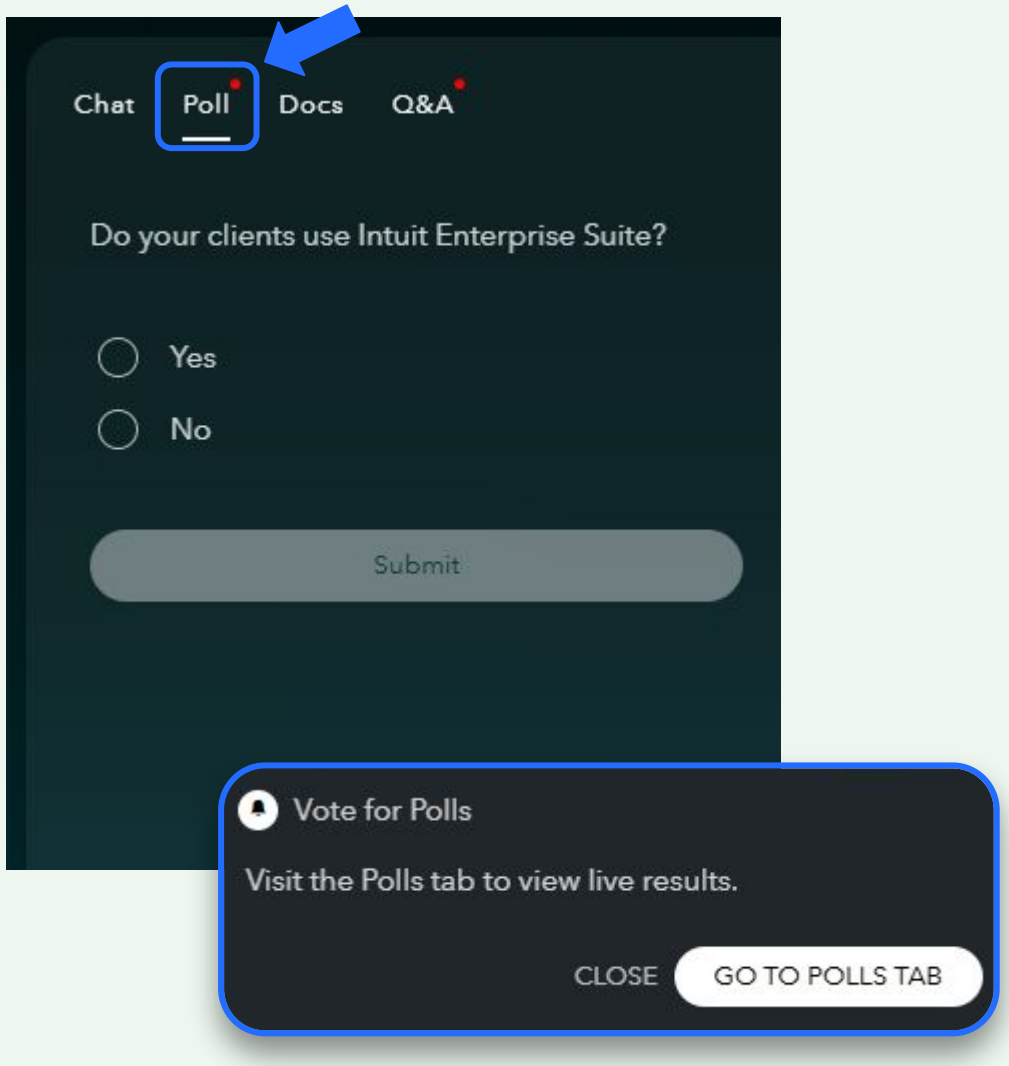
Polling questions

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.



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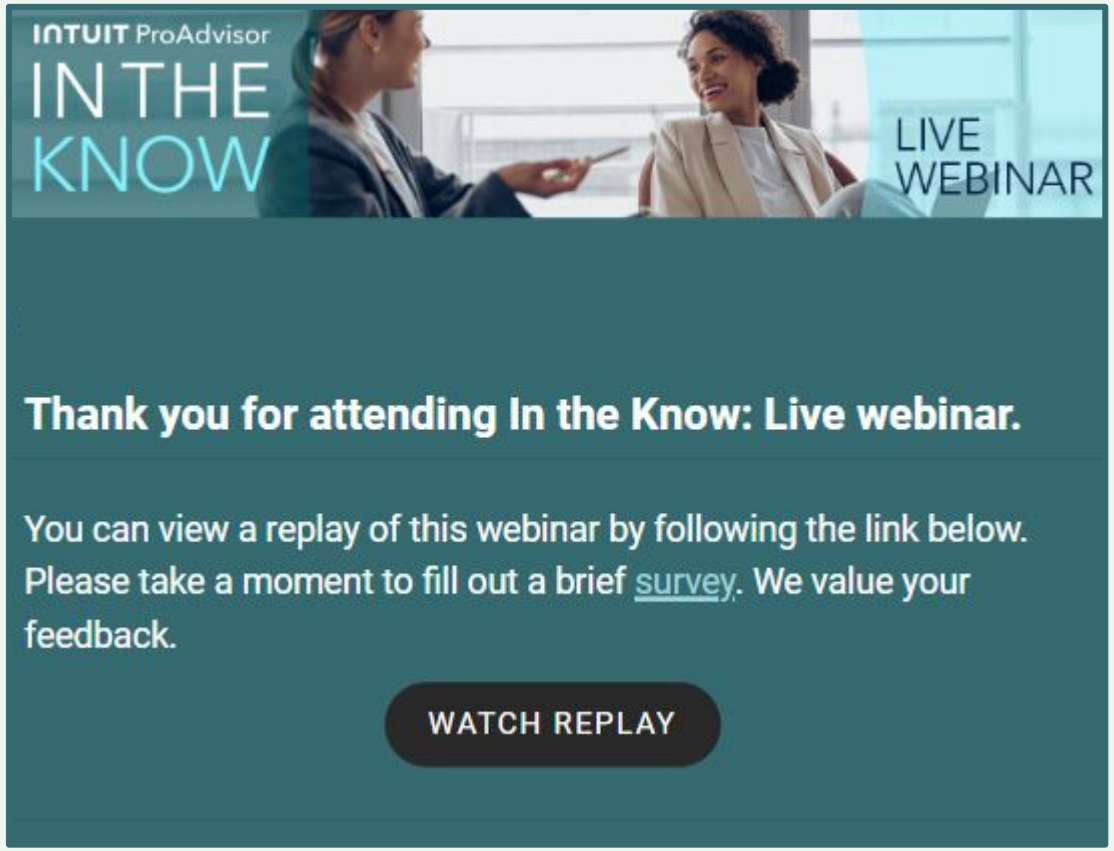
Session recording

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.



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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

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ProAdvisor community news

INTUIT ProAdvisor
IN THE
KNOW

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Intuit Enterprise Suite Certification is now Live in ProAdvisor Academy!

What can you expect?

- 4.5 hours of training
- Deep dives into Multi-Entity, Projects, and Business Intelligence
- Real-world workflows designed for growing and complex clients
- Practical training to help your firm work smarter and scale confidently

Benefits:
Earn up to 200 ProAdvisor Points and CPE credit

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Updates to **Manage Training** in Intuit Accountant Suite

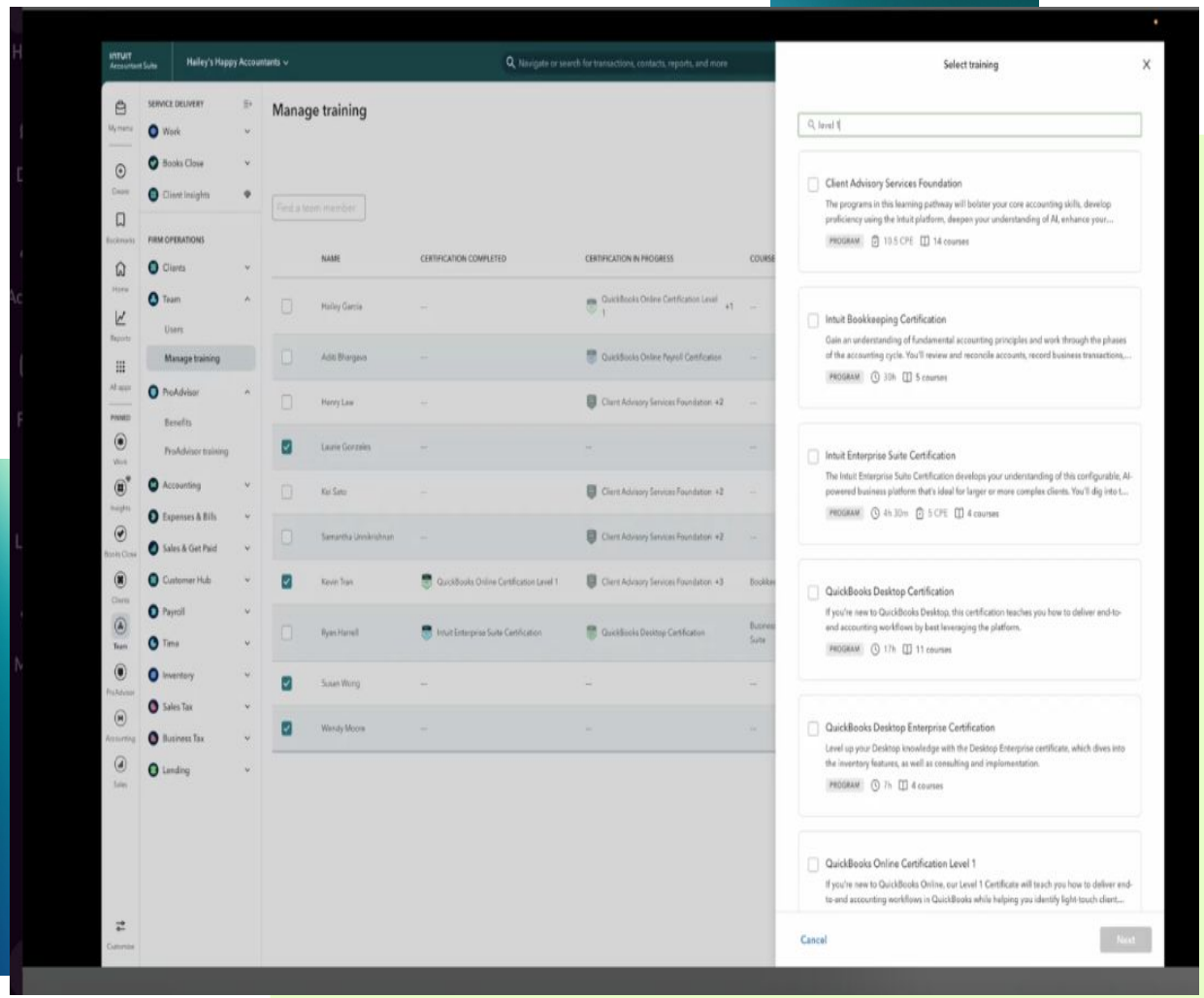
New: Assign & Track Training with Visibility

For Leaders

- Assign courses, certifications, learning plans, and pathways to one or multiple team members
- Set due dates to drive accountability
- Prevent duplicate enrollments and flag unmet prerequisites
- Track progress, CPE credits, time spent, and completion status

For Accountants

- Assigned training displayed prominently in MyHub
- Clear visibility into due dates and expectations
- In-app notifications in IAS and ProAdvisor Academy



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Why Attend Intuit Partner Webinars?

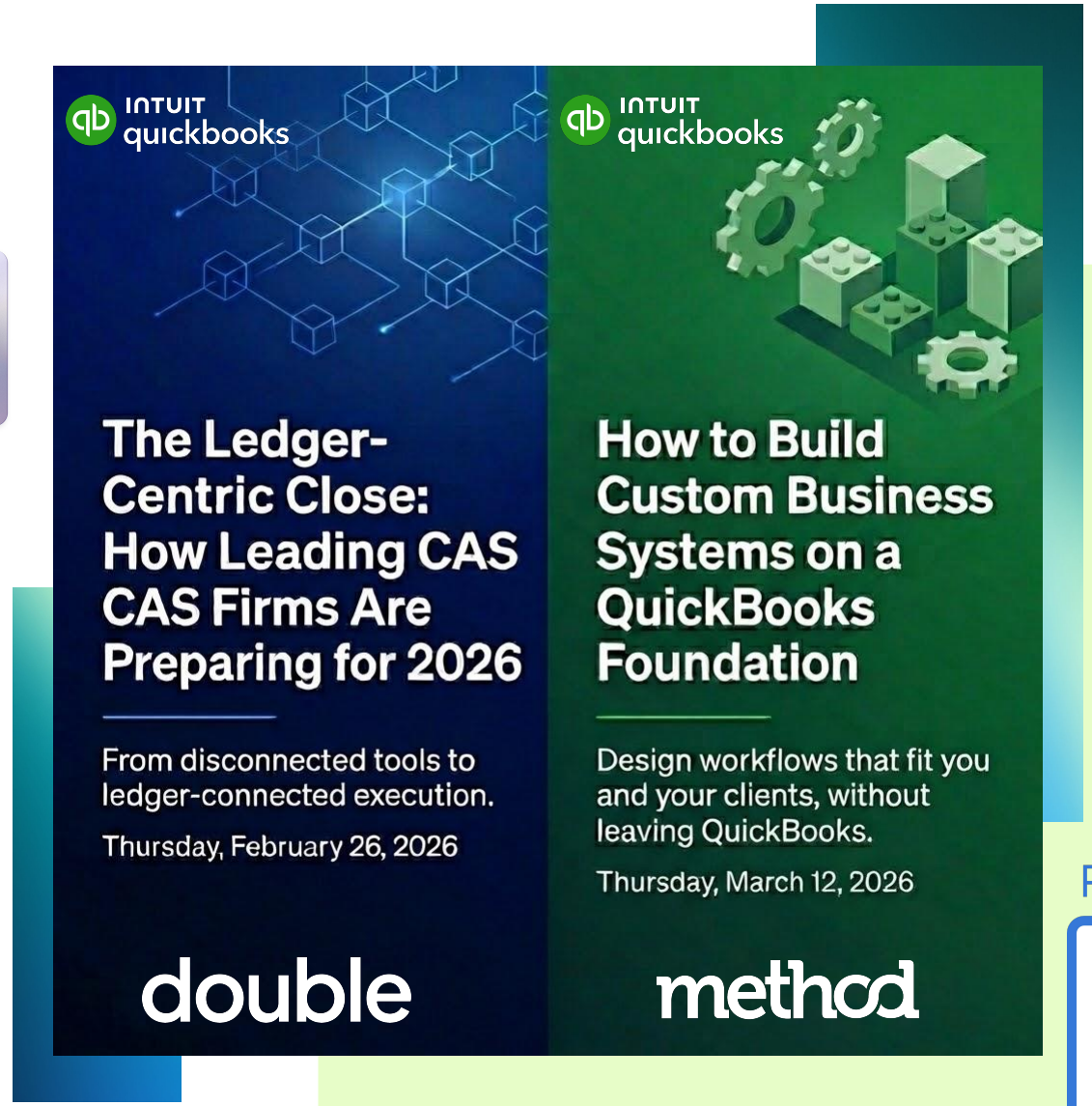
Learn from the Best in the Ecosystem
Features only Platinum-tier partners that are the top-rated, most widely adopted, and technically validated apps across the Intuit ecosystem.

See Real-World Use Cases
Discover how leading firms use these solutions to streamline workflows, scale CAS, and deliver client value.

Expand What's Possible with QuickBooks
Explore specialized apps that extend QuickBooks for deeper automation, industry-specific needs, and custom workflows.

Stay Ahead of Client Expectations
Gain practical, immediately implementable strategies to elevate your firm and grow with confidence.

Register today at:
intuit.me/PartnerWebinars



REGISTER

INTUIT ProAdvisor

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Affirm Buy Now Pay Later (BNPL)

What is BNPL?

A "Pay Over Time" payment option through Affirm that will be available on invoices sent through QuickBooks Online (QBO)

Launch timing: Roll-out starting in March

Key benefits for your clients:

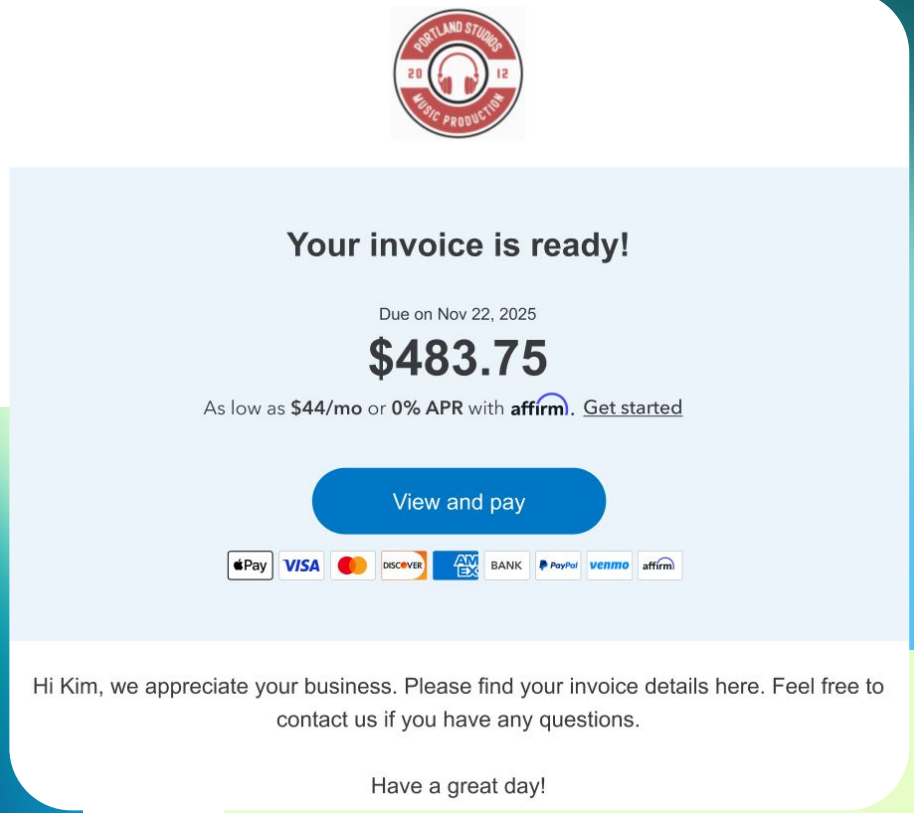
They receive payment from Affirm upfront, helping to pull forward cash flow.

No setup required. Affirm will automatically appear as a payment option on invoices and Affirm manages the payment process with customers.

Customers can pay Affirm over time with rates as low as 0% APR. They'll get flexible installment payment terms with no late or hidden fees, at no risk to your clients.

Simple pricing. They pay the standard 2.99% credit card processing rate.

No added work. There is no change to how your clients create or send invoices. Affirm transactions reconcile like other payments in QuickBooks.



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You could be the ***2026 Top QuickBooks Online ProAdvisor*** like ***Kathy Zaroczynski*** of Rochester, New York, was in 2025.

Insightful Accountant®

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

To nominate your favorite Advisor or apply for these awards, click this QR code to go to the **2026 Awards Portal**.

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

Product Innovations

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Intuit Enterprise Suite releases

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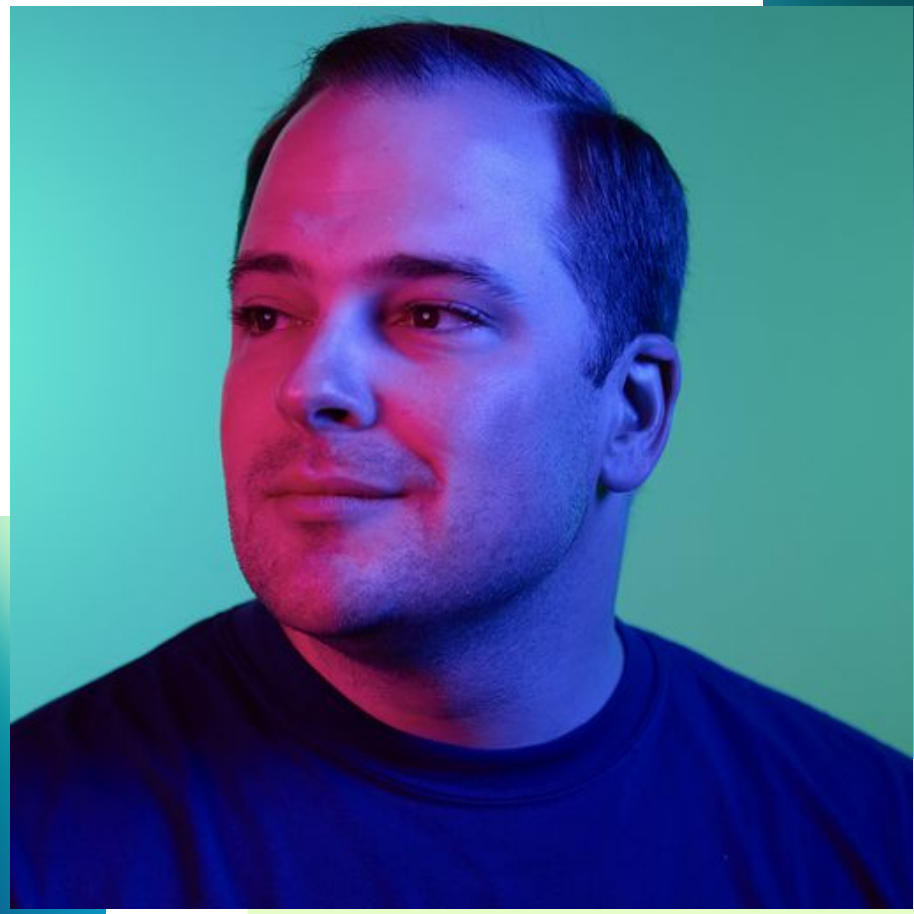
Jed McLoughlin
Group Manager Marketing

Team: Mid-Market
Location: Mountain View, CA



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Our Approach

Intuit Enterprise Suite February Release

What we heard (VOC)

Accountants and Mid Market businesses are looking to Intuit to continue building out the platform to meet their needs and complete the newer capabilities included in Intuit Enterprise Suite. Additionally, industry-specific needs have been top of mind for accountants and businesses alike.

What we did (end product)

- We made improvements to areas like Approvals, Dimensions and Business Intelligence.
- We introduced our first industry edition in the Intuit Enterprise Suite construction edition (beta)
- We also made key improvements to inventory features for product-based businesses

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Fast facts

Who

Intuit Enterprise Suite Subscribers

How

Intuit Enterprise Suite > Gear Icon > What's New

When

Live as of February 11, 2026

Where

US

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Table of contents

Introduction 2

Multi-entity financial management 4

New consolidated reports 5

Workflow automation enhancements 6

Parallel approvals 7

Detailed audit trails 8

Dimensions on workflow automation 9

Intuit AI enhancements 10

Finance AI 11

Accounting AI 12

Intuit Enterprise Suite for construction (beta*) 13

Project phases 14

Cost groups 15

Project budgets enhancements 16

Proposals 17

Negative change orders 18

AIA style invoicing 19

Inventory and order management 20

Item receipt 21

Moving Average Cost valuations 22

Sales order enhancements 23

Business intelligence 24

Improved modern report view 25

Calculated fields 26

Management reports 27

More app integrations 28

KPIs and dashboards 29

Dimension enhancements 30

Dimension assignment 31

Workforce management 32

Garnishments 33

Consolidated employee list 34

Assignments in QuickBooks Time 35

* Features in beta are subject to change or discontinue at any time, and Intuit may introduce fees or other pricing requirements for such features in the future.

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Introduction 2

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INTUIT
Enterprise Suite

Intuit Enterprise Suite for construction BETA*

Intuit Enterprise Suite now offers capabilities to help construction businesses manage projects end-to-end—from winning bids, through project planning and execution, to project close—all with AI automating steps along the way. With **Home**, **Reports**, and **Dashboards** surfacing the most industry-relevant information, construction businesses that use Intuit Enterprise Suite can now bring project operations and finances under one roof, to help ensure projects are delivered profitably and on time.

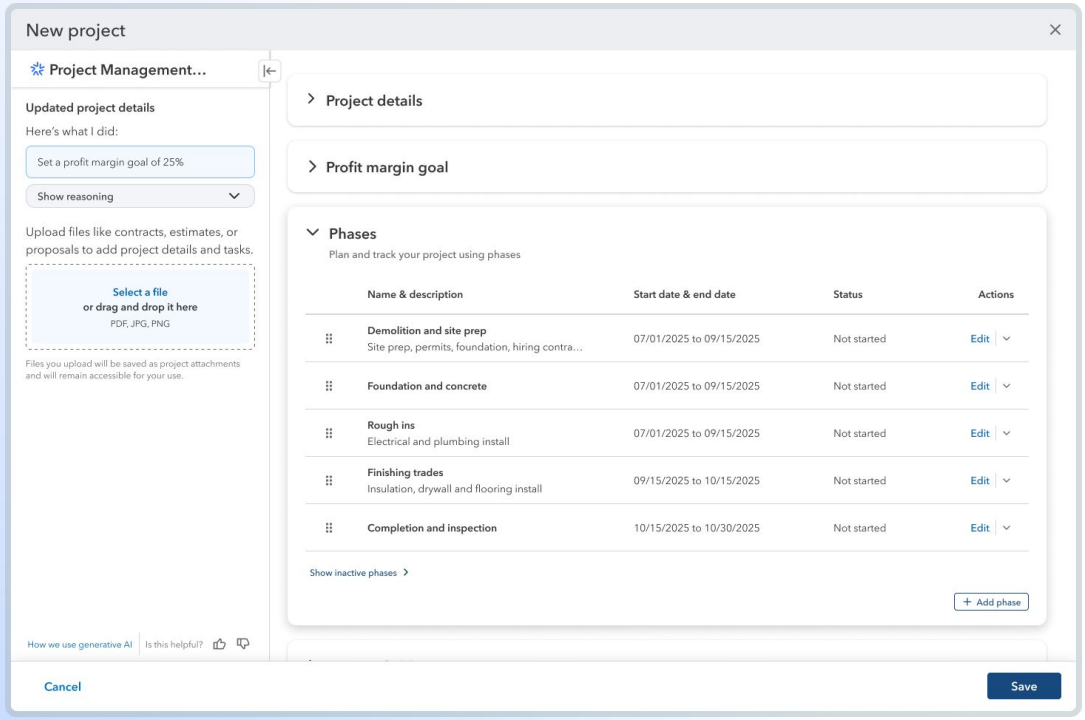
The following features are now available in beta to construction businesses that use Intuit Enterprise Suite:

- Project phases
- Cost groups
- Project budgets enhancements
- Proposals
- Negative change orders
- AIA style invoicing

* Features in beta are subject to change or discontinue at any time, and Intuit may introduce fees or other pricing requirements for such features in the future.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Project phases



What

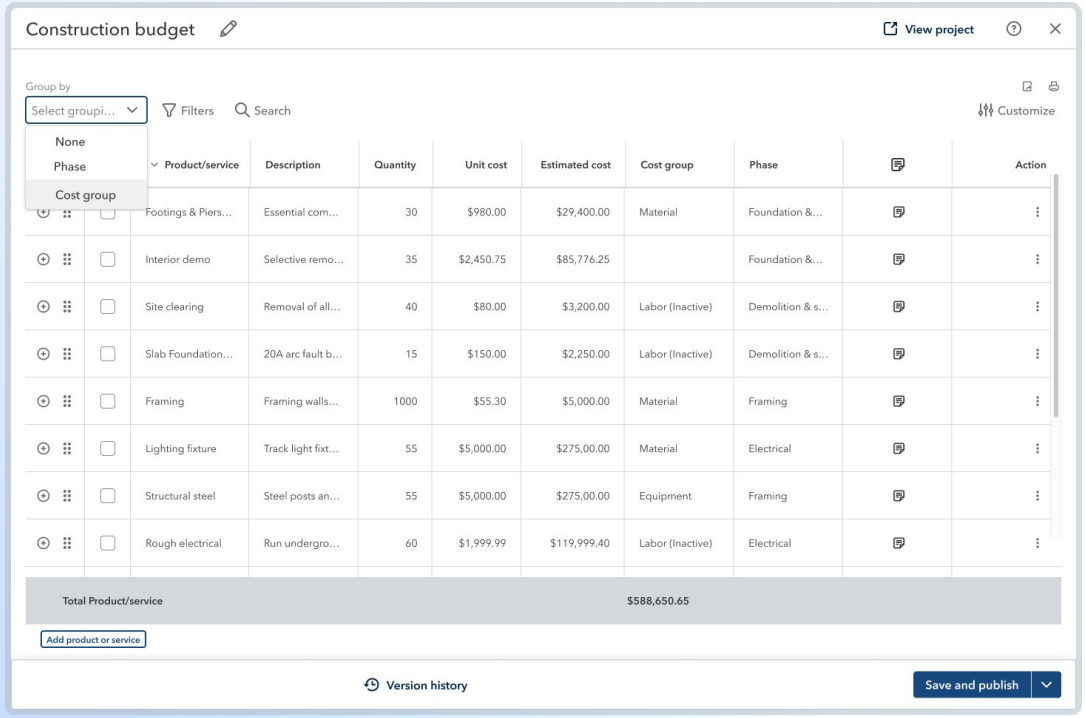
Define the phases of a project and use them to help organize your project budgets and estimates. Project Management AI will also recommend project phases when creating a project for you, with suggestions based on client communications, documents, and notes that you upload.

Why

Stay on top of cash flow, profitability, and effective project management in one place, by planning and tracking your budget and progress against project phases without leaving Intuit Enterprise Suite.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Cost groups



What

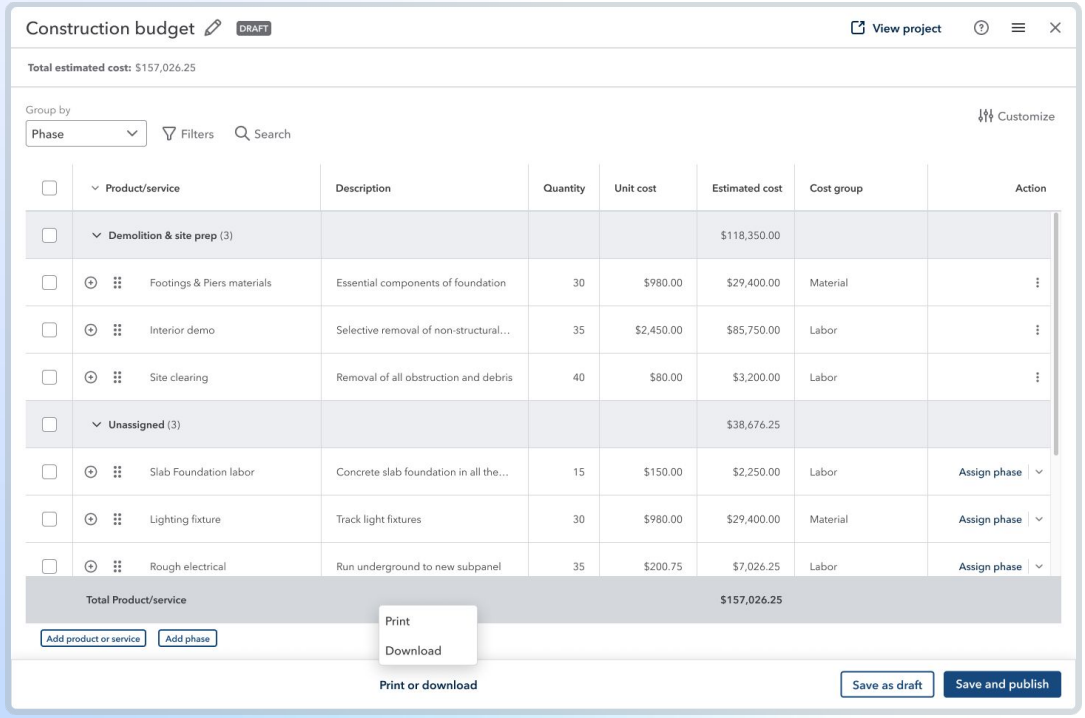
Within your list of products and services, designate industry-standard cost groups such as labor, materials, equipment, subcontractor, or miscellaneous. You can also track cost groups across budgets, expenses, POs, and bills. For example, filter key reports by cost groups to compare estimated versus actual costs and quickly identify cost overruns at the right level of detail.

Why

New cost groups are an effective way to plan and track project costs for better job costing and project profitability tracking. Get the analytics and details you need in less time, without manual spreadsheet workarounds.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Project budgets enhancements



What

Project budgets now have simplified setup, real-time insights, and more comprehensive reporting. Project managers and finance teams can track budgets and variances by phase, get real-time insights on budget overruns right on their project summary dashboard, export or print budgets, and compare budget versions across all project cost reports.

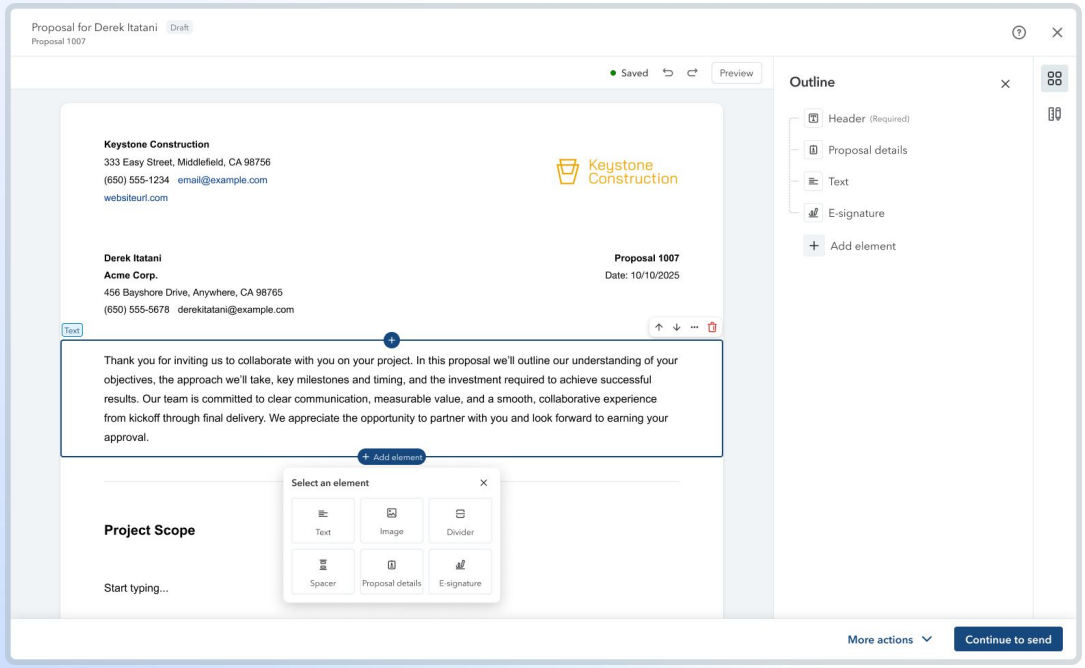
Plus, for businesses upgrading from QuickBooks Advanced or QuickBooks Desktop, project budgets are automatically created during migration. Your existing project cost data will be carried over so your teams can start managing budgets from day 1.

Why

Construction teams get more opportunity to proactively control costs, keep projects on track, and protect margins. No more time wasted manually setting up budgets, working in spreadsheets, and reacting to overruns after it's too late. Simplify internal collaboration and performance review over time with exportable and versioned budgets. This will help your business run more profitable projects with less manual effort.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Proposals



What

Create project proposals to help your business win more bids. New capabilities include:

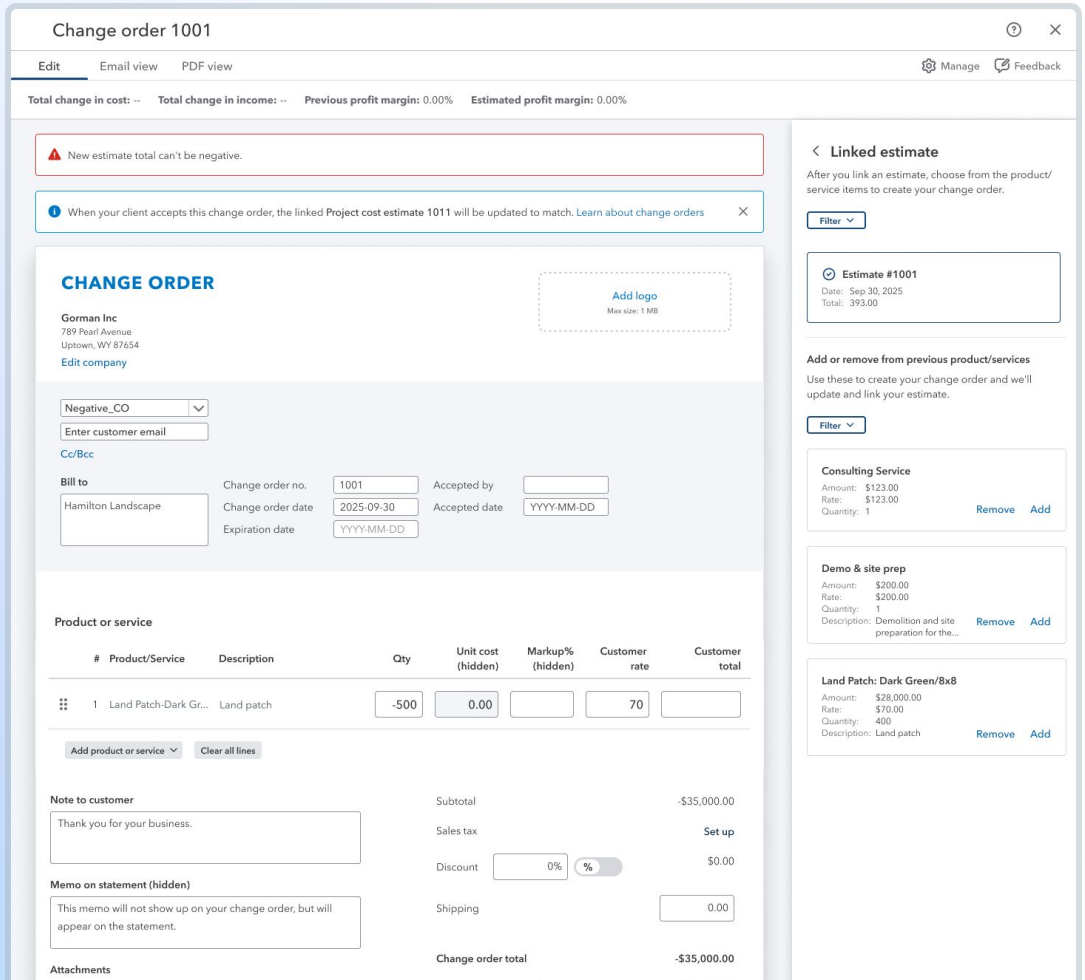
- A **proposal document builder** for creating proposal documents with custom branding, rich text, images, and integrated e-signatures
- **Proposal and estimate integration** that allows businesses to create proposals from estimates, or create estimates from proposal
- A **client portal** where your clients can sign documents, make deposits, and review their project's scope and approved costs

Why

Winning bids is the first step to growing your business. These updates help you deliver professional client communications and smoother internal processes for better overall client experience.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Negative change orders



What

The change orders functionality in Intuit Enterprise Suite now allows for negative change orders to better account for price adjustments and scope reductions.

This enhancement allows you to:

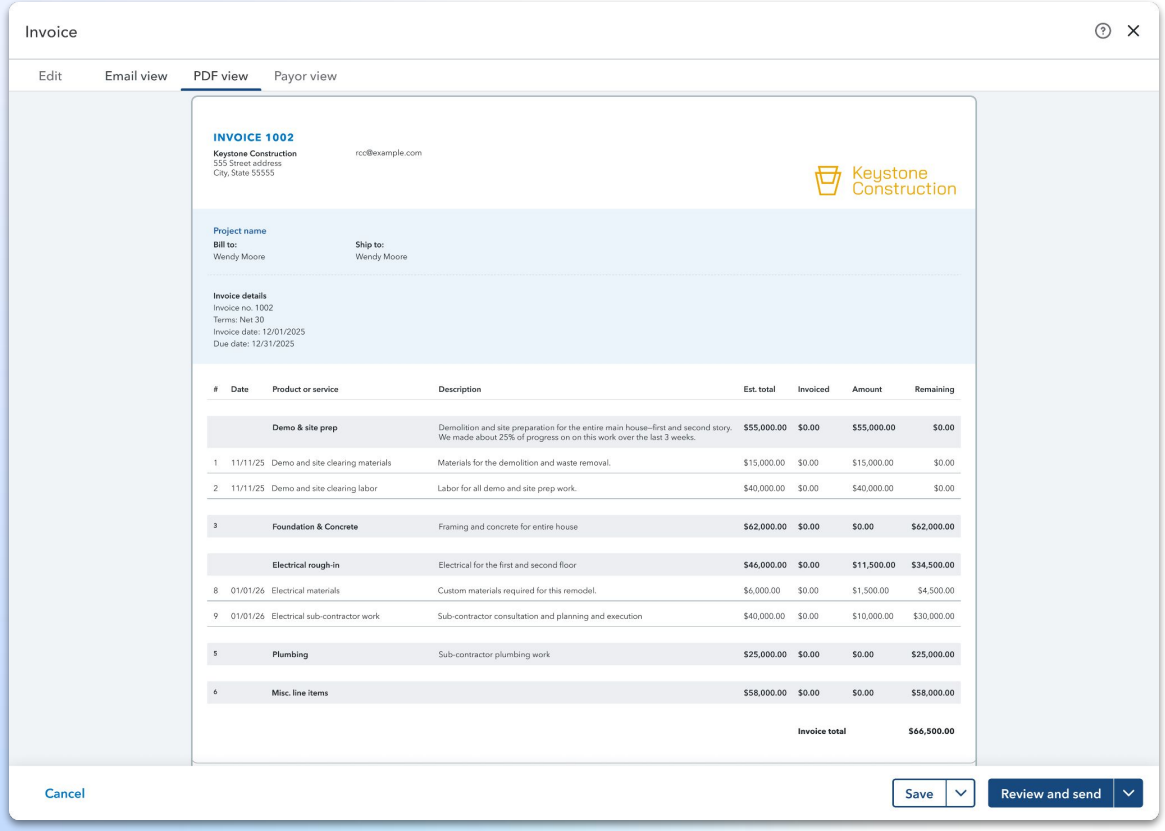
- Add or remove products or services from a project estimate within the same change order
- Create and manage net-negative change orders (total less than $0)
- Adjust project estimate income by subtracting amounts specified in accepted negative change orders
- Prevent project estimates from going below $0
- Create and manage multiple negative change orders, as long as your new estimate total is above $0

Why

Protect your margins by eliminating offline calculations. Intuit Enterprise Suite now handles negative change orders, ensuring your profitability tracking is always accurate and your project status is updated in real-time.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

AIA style invoicing



What

With the AIA invoice format, you can track the total contract value on estimate, invoiced to date, invoice amount, and remaining balance at the phase level. Each new invoice builds on the last and carries forward the invoiced-to-date and remaining balances. In addition, invoices and estimates are now available in the client portal and invoice PDFs.

Why

Construction businesses on Intuit Enterprise Suite no longer need to spend hours creating a schedule of values by exporting data and manually manipulating it in a spreadsheet. By using AIA style invoicing format, your team and your clients will be on the same page about prior invoicing history as well as the remaining outlook, allowing you to better manage your client relationship and the project's profitability. Build trust with your customers by providing invoices that include information and transparency.

INTUIT
Enterprise Suite

Inventory and order management

Strengthen your inventory and order management workflows with enhancements and new features that help you avoid rework, boost accuracy, and more closely connect sales, inventory, and accounting.

Item receipt

Moving Average Cost valuations

Sales order enhancement

INVENTORY AND ORDER MANAGEMENT

Item receipt

What

Count on an item receipt as the official record of physical goods received in Intuit Enterprise Suite.

With this updated inventory-receiving workflow:

- Item receipts update quantity on hand when goods arrive
- You can receive full or partial quantities with clear adjustments
- Inventory receiving and bills are now separated

Why

In Intuit Enterprise Suite, your team now has an efficient, modern inventory receive-to-pay workflow with:

- Inventory accuracy: Quantity on hand accurately reflects real receipts in a timely manner.
- Financial accuracy: COGS and AP align to when goods are received, reducing accrual issues, duplicate payments, and audit risks.
- Operational efficiency: Instead of manually reconciling POs, shipments, and bills, you can manage partial and full receipt adjustments through the workflow.
- Supplier accountability: Reduce unnecessary disputes and credits by tracking potential discrepancies at the time of receiving.

INVENTORY AND ORDER MANAGEMENT

Moving Average Cost valuations

What

When migrating from QuickBooks Desktop, you can now choose to continue using your Moving Average Cost (MAC) valuations instead of switching to FIFO. Item quantities and average costs are preserved when migrating, and the cost engine maintains MAC in real time for all posting transactions across bills, item receipts, invoices, and adjustments.

Why

Maintain the accuracy of your inventory valuations and COGS without reworking your financial reporting methods. Keep your team's focus on making confident pricing and production planning decisions instead of spending time reconciling cost differences, with an easier path between QuickBooks Desktop and Intuit Enterprise Suite.

INVENTORY AND ORDER MANAGEMENT

Sales order enhancements

What

Enhanced sales order functionality helps you further streamline and customize your workflows:

- Sales orders now connect to POs, estimates, and invoices.
- Generate open sales order by item and customer reports that include more sales order data, such as due date, quantity invoiced, and quantity backordered.
- You can customize order forms with order details, such as shipping information, class, and accounting fields, without resorting to spreadsheets.
- Edit column names in the sales order transaction form.
- Attach support documents directly to a sales order for additional context.
- Track sales order changes using more detailed audit logs.
- When selling in multiple currencies, show foreign totals with automatic home-currency conversion.

Why

Connect your sales, inventory, and accounting by customizing sales orders to fit your workflow–eliminating manual work and fragmented systems.

Help ensure your data is consistent throughout the order-to-cash process by linking estimates to sales orders and invoices. Operate with confidence knowing that adjustments are captured and compliant, with a detailed audit log.

INTUIT
Enterprise Suite

Workflow automation enhancements

Further customize workflows and maintain more detailed audit trails to help your business reduce tedious tasks while building in more transparency and accountability.

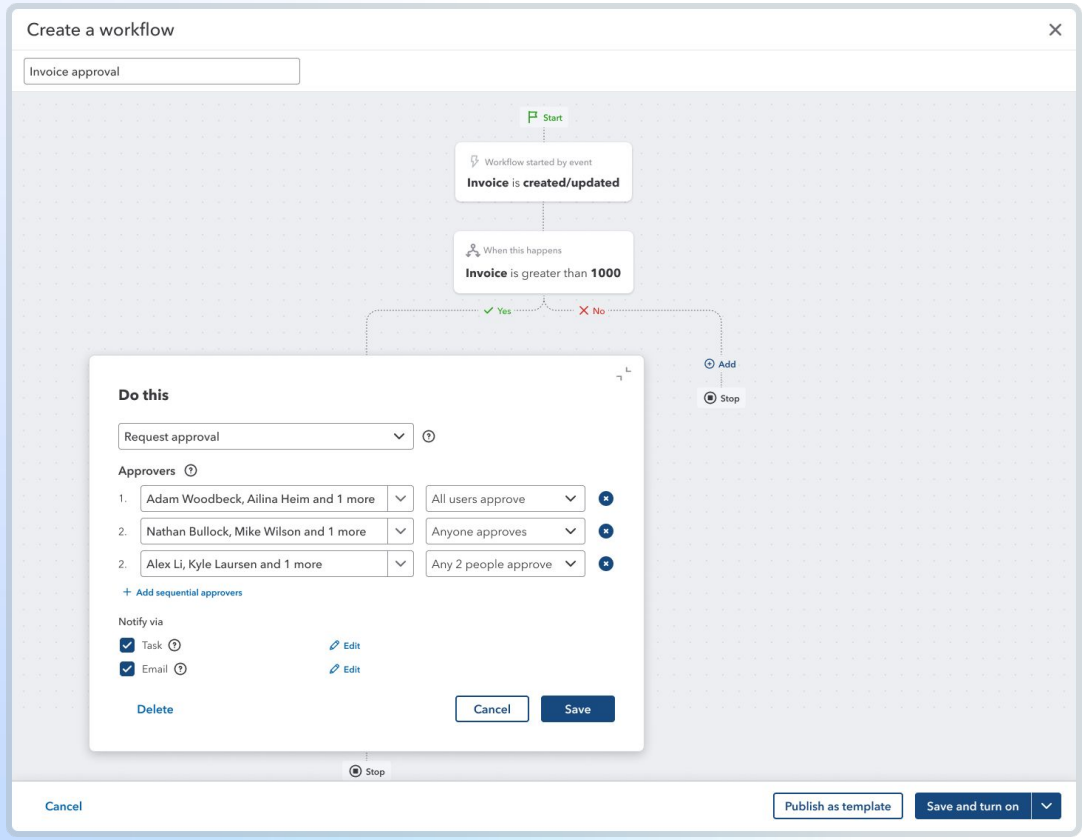
Parallel approvals

Detailed audit trails

Dimensions on workflow automation

WORKFLOW AUTOMATION ENHANCEMENTS

Parallel approvals



What

Your workflows in Intuit Enterprise Suite can now include parallel approvals, with more detailed audit trails.

Parallel approvals allow you to add up to 5 approvers in a workflow and specify a required minimum number of approvals. You can also create hybrid workflows to combine sequential and parallel approval steps.

Why

Get more flexibility to create complex workflows that meet your business needs. Help speed up processes by empowering multiple authorized reviewers in parallel to approve transactions. Focus your teams on higher-value work by eliminating bottlenecks and manual follow-ups.

INTUIT
Enterprise Suite

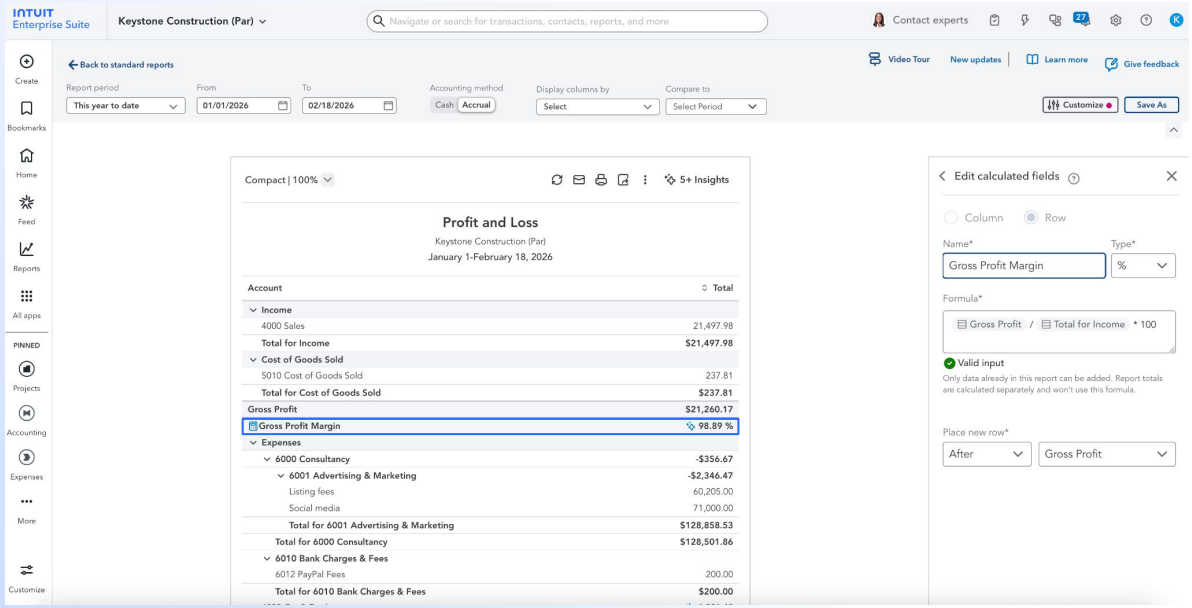
Business intelligence

With new tools and flexibility for reports, app integrations, KPIs, and dashboards, you get the insights and analysis your business needs, with real-time performance tracking—all in one place.

- Improved modern report view
- Calculated fields
- Management reports
- More app integrations
- KPIs and dashboards

BUSINESS INTELLIGENCE

Calculated fields



What

Add custom formulas to columns or rows directly within your most-used standard reports. This allows you to perform calculations, such as margin percentages or financial ratios, on top of existing report data—all without exporting to Excel.

Why

Avoid data exports and spreadsheet calculations to get the views you need. Create custom formulas, save your report, and come back to it anytime—all without rework or spreadsheet workarounds.

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Intuit Intelligence

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Ruta Bhat
Staff Customer Experience Professional

Team: GBSG Customer Experience
Location: Plano, TX

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Polling question

Do you currently use conversational AI?

1. Never
2. Rarely
3. Sometimes
4. Always

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Our Approach

Intuit Intelligence

What we heard

Customers and Accountants are seeking instant answers to their questions as they become more comfortable utilizing AI to create more efficiencies in their personal and professional lives.

What we did

Introduced **Intuit Intelligence** chat (beta) to unify your financial data into a single, intuitive experience that delivers instant answers and personalized recommendations.

- Brainstorming - explore ideas and uncover opportunities to help think through decisions with confidence.
- Analytics - ask precise, data-driven questions and receive instant, visual insights.

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Fast facts

Who

Admin users with a QBO subscription

How

QBO > Navigation menu

When

Live as of Feb 2026

Where

US

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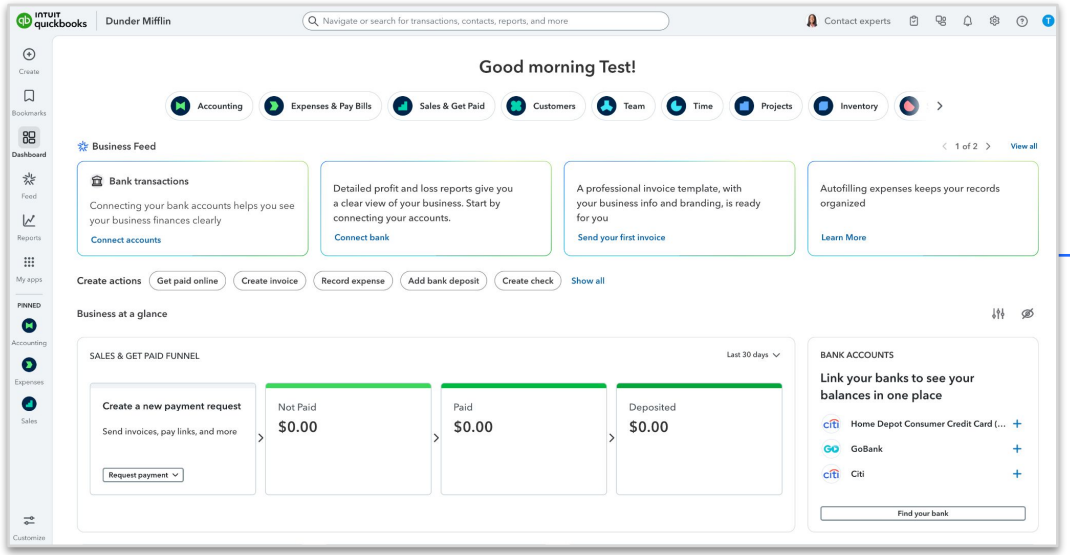
Intuit Intelligence: How can I access this feature?

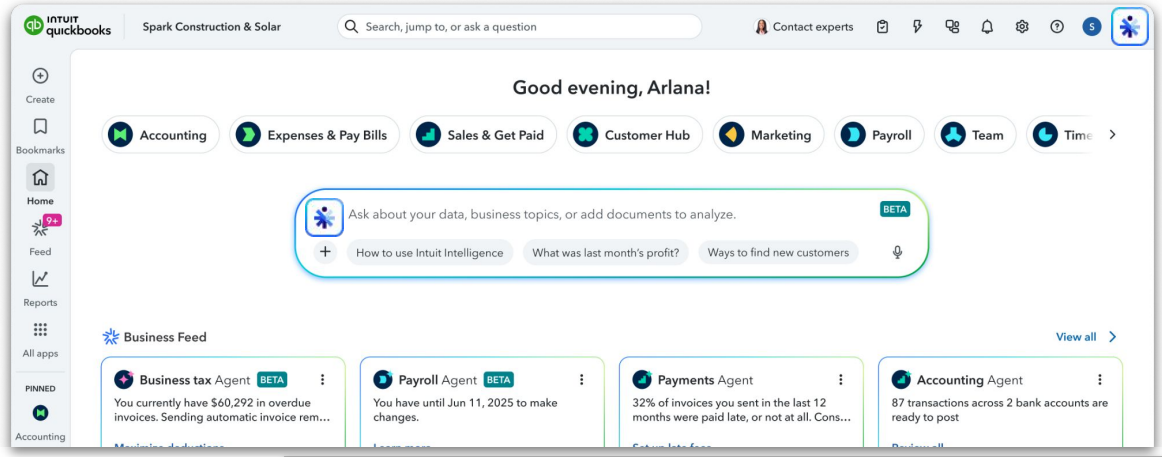
From > To State - Visuals

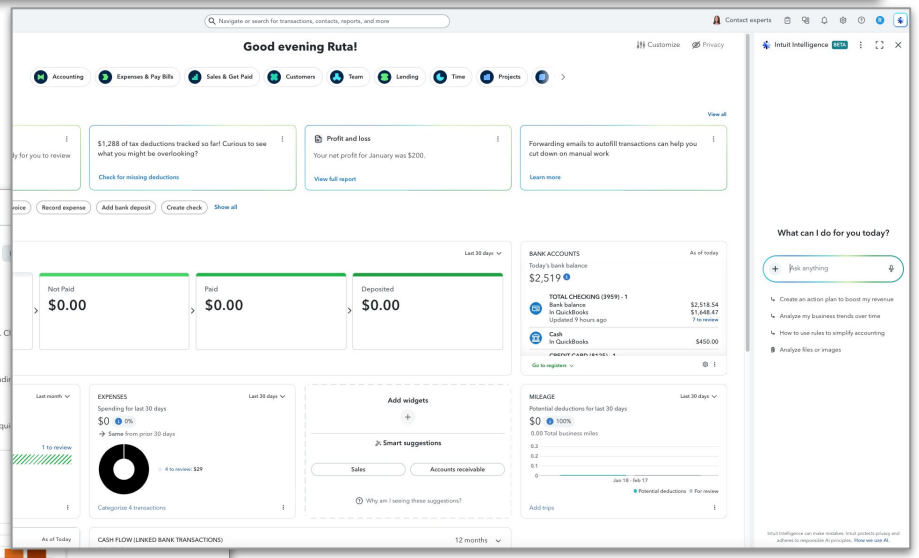
FROM

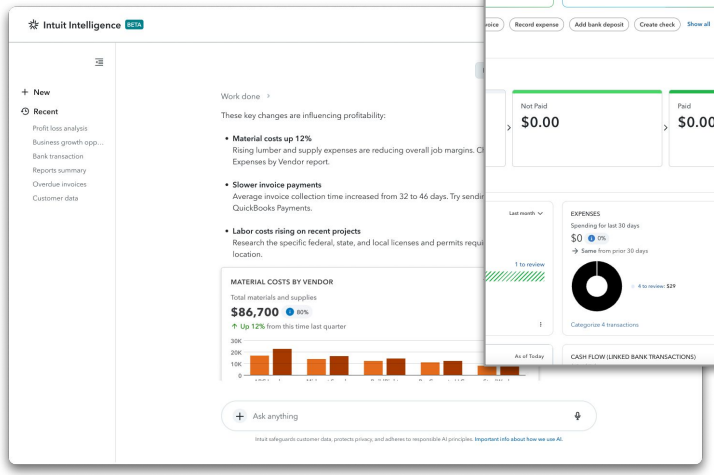


TO

Access point in header and embedded in reports, small population sees access point on the homepage at the top dashboard.
Some customers will see the side panel view automatically open as a side bar.







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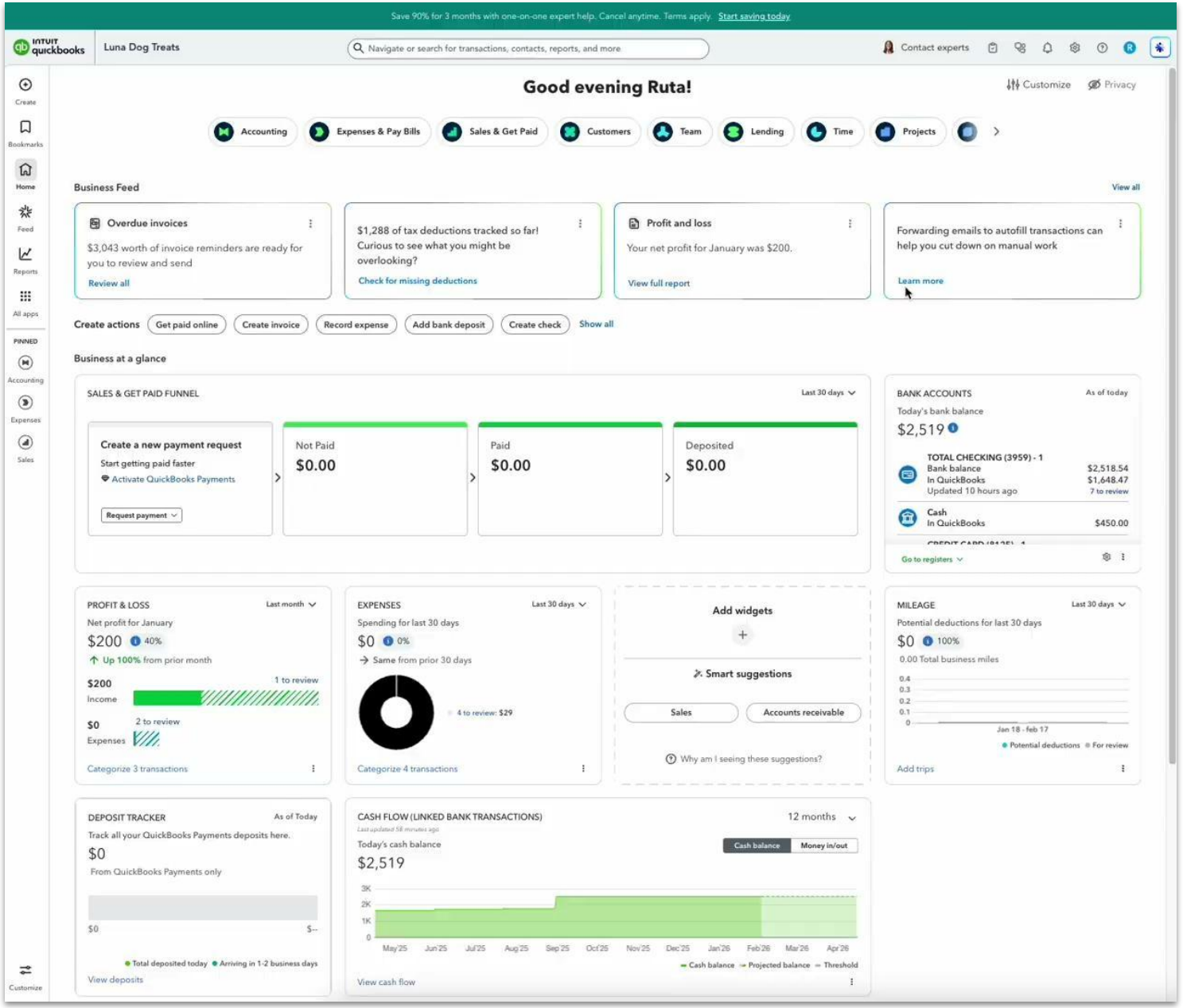
Intuit Intelligence Demo



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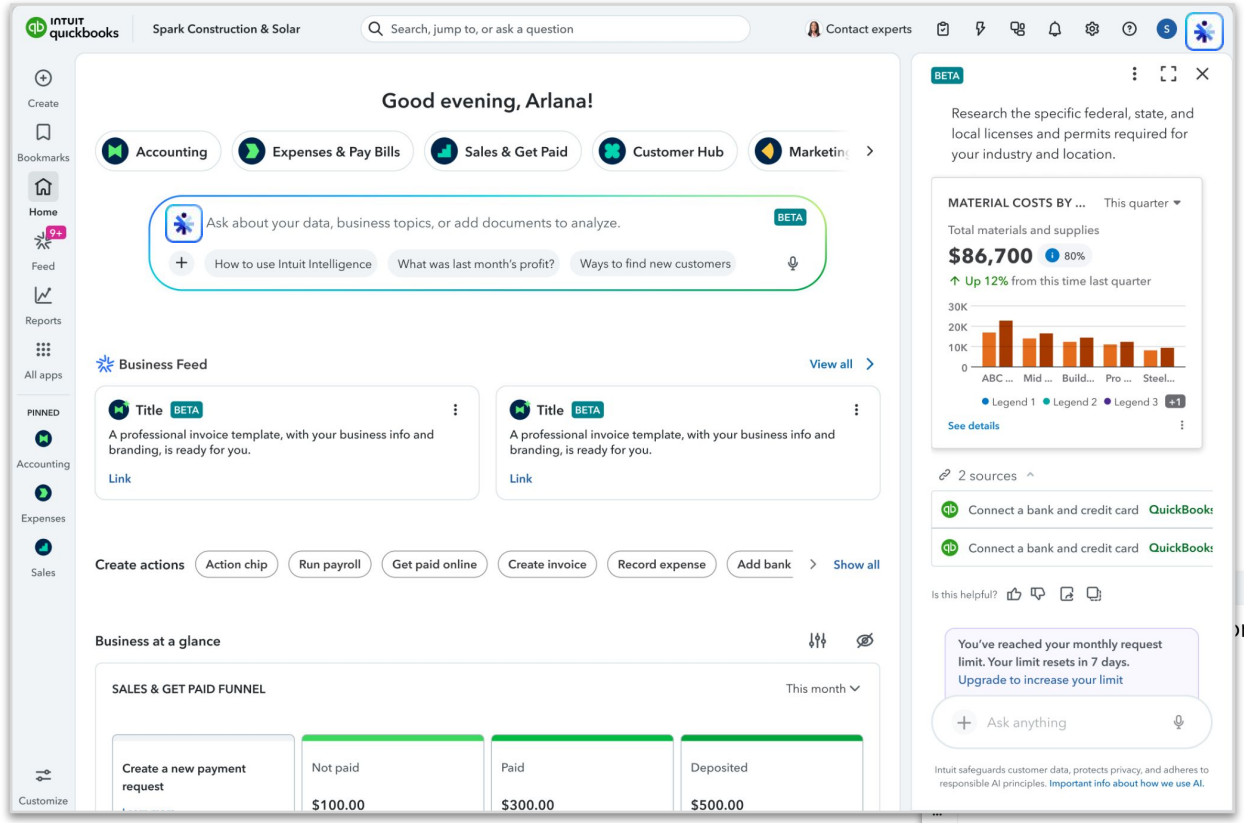
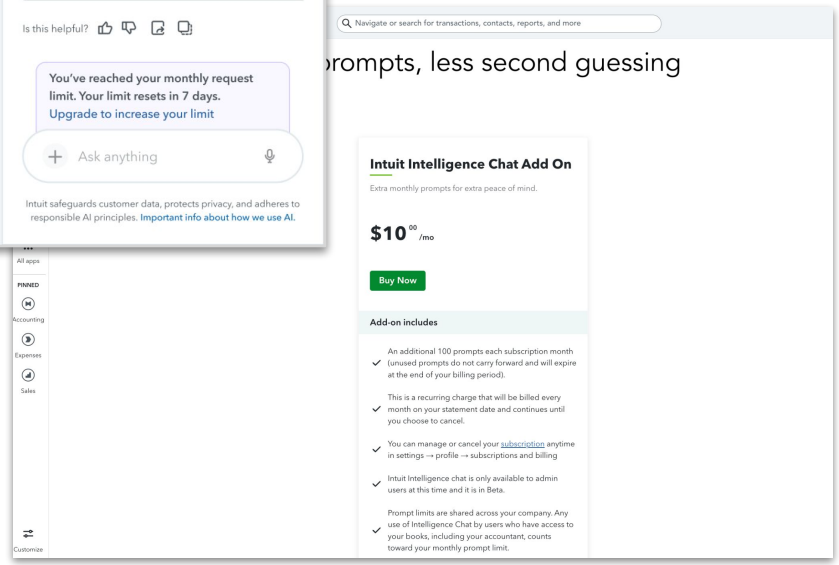
Intuit Intelligence: How can I purchase more prompts?

Each eligible QuickBooks plan includes 25 Intelligence Chat prompts per month. Once you use all 25 prompts, Intelligence Chat stops until the next billing cycle starts. Then, your prompts will reset automatically.





How to Purchase additional prompts

You can buy more prompts through the Intelligence Chat add-on in two ways:

- **In QuickBooks** - Select **Add more prompts** when the message appears after you reach your monthly limit.
- **Online purchase page:** Visit the Intuit Intelligence Chat Add-on page.

Additional queries are available immediately and renew monthly with your subscription.

Cancel your prompt subscription

1. Go to **Settings** , then **Subscriptions and billing**.
2. Select **Cancel** and follow the steps to cancel your subscription.

The add-on will remain active until the end of your current billing cycle.

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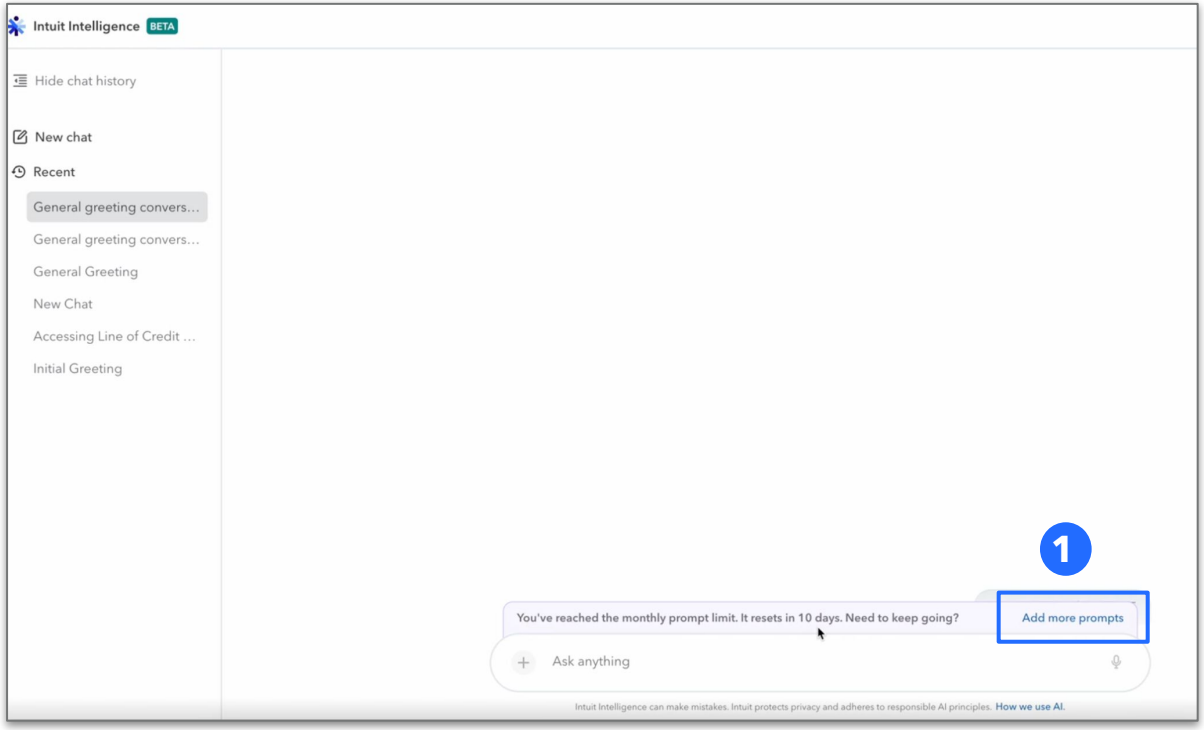
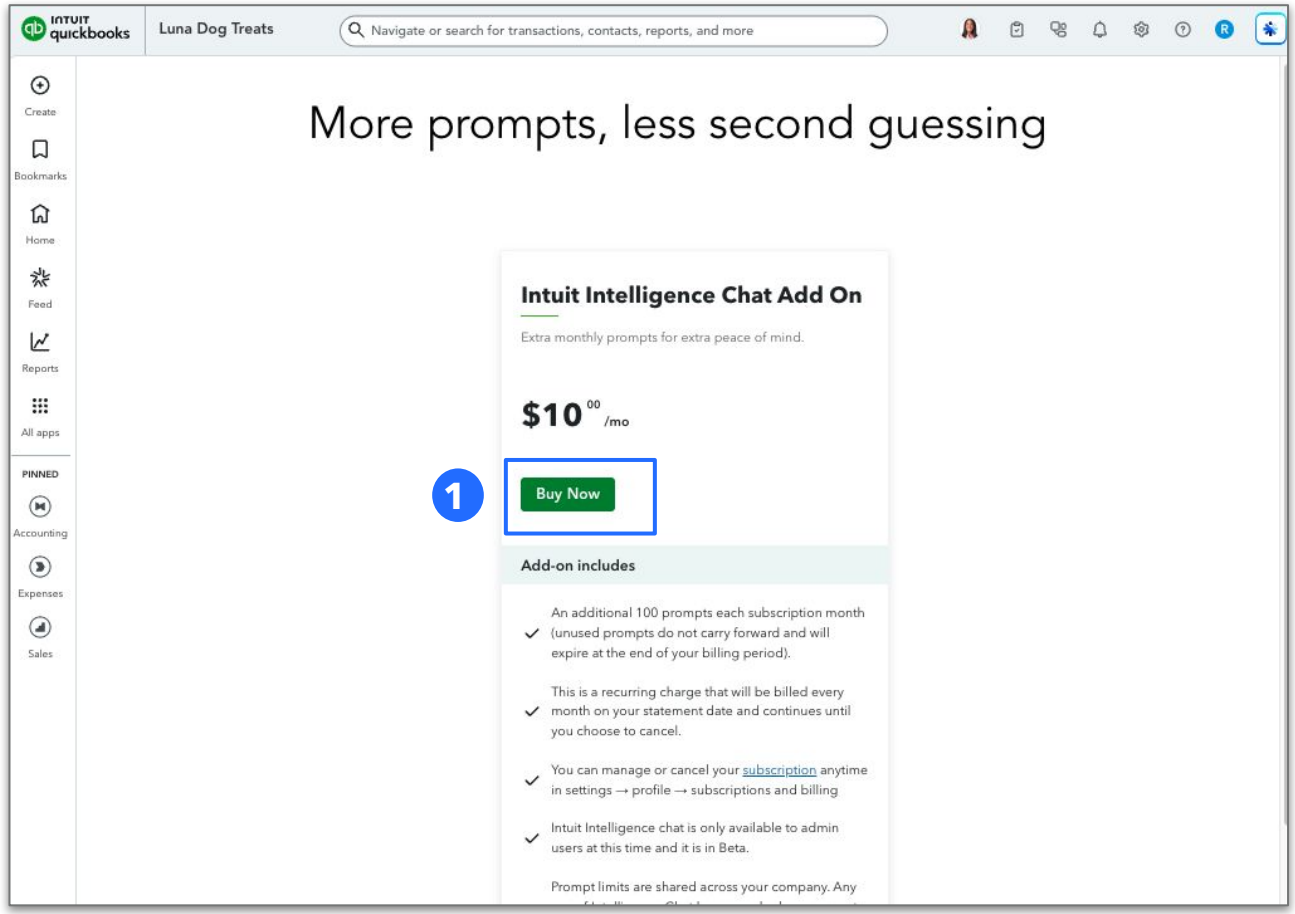
Intuit Intelligence: How can I purchase more prompts?

Visit the Intuit Intelligence Chat Add-on page >> Buy Now (You can also get to the Buy Now Page by clicking on Add more prompts option >> Buy Now)





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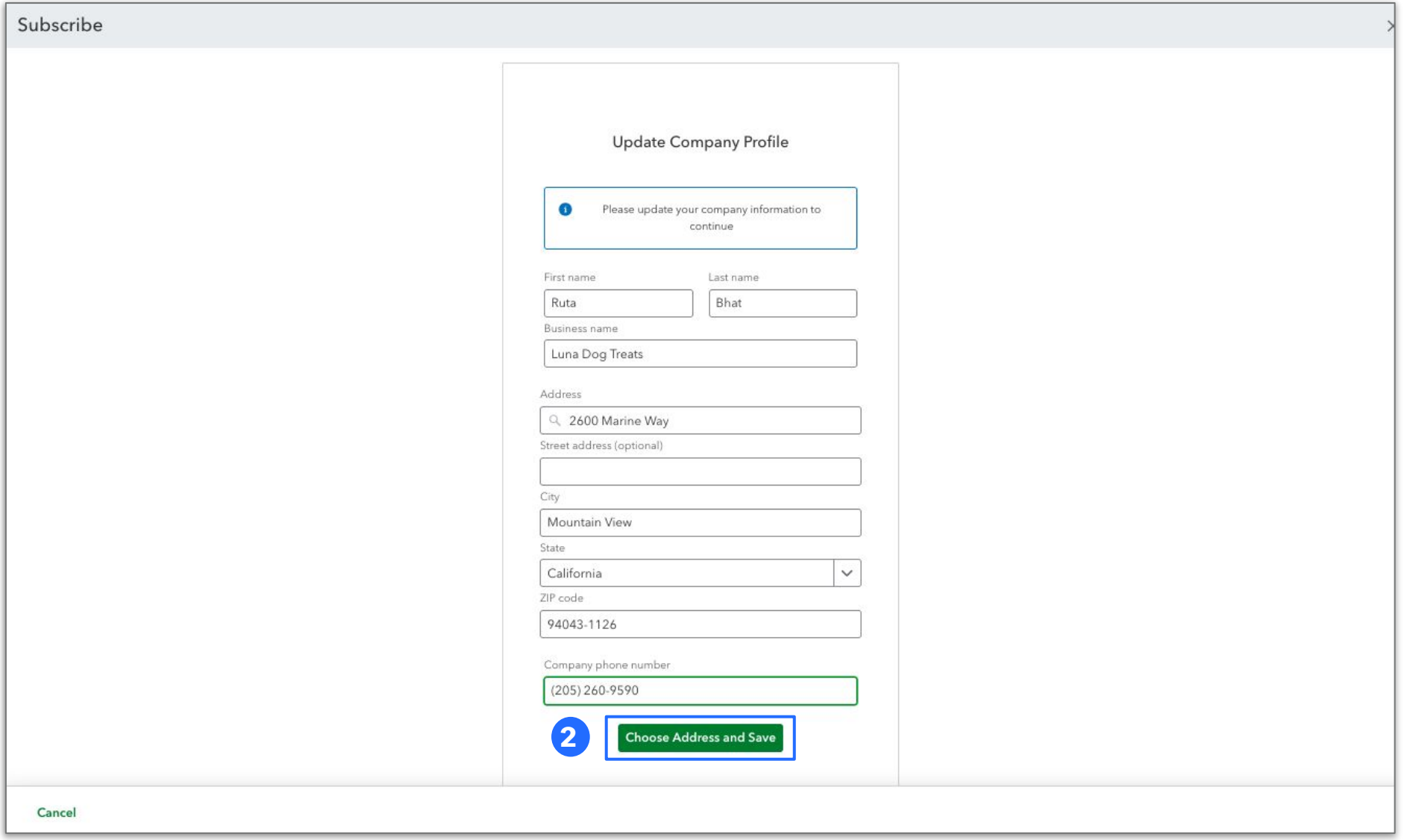
Intuit Intelligence: How can I purchase more prompts?

Visit the Intuit Intelligence Chat Add-on page >> Buy Now >> Choose Address and Save



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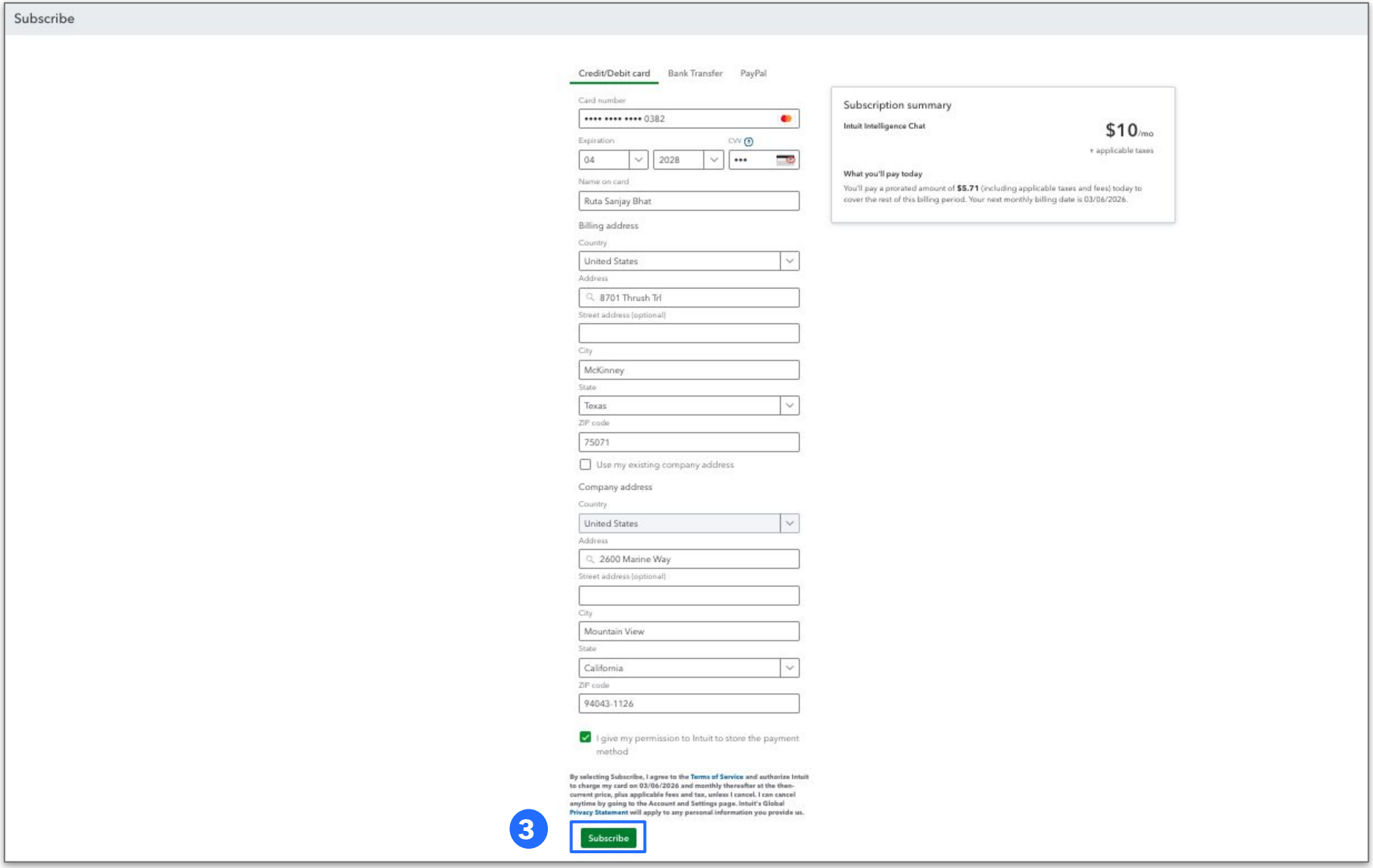
Intuit Intelligence: How can I purchase more prompts?

Visit the Intuit Intelligence Chat Add-on page >> Buy Now >> Choose Address and Save >> Subscribe



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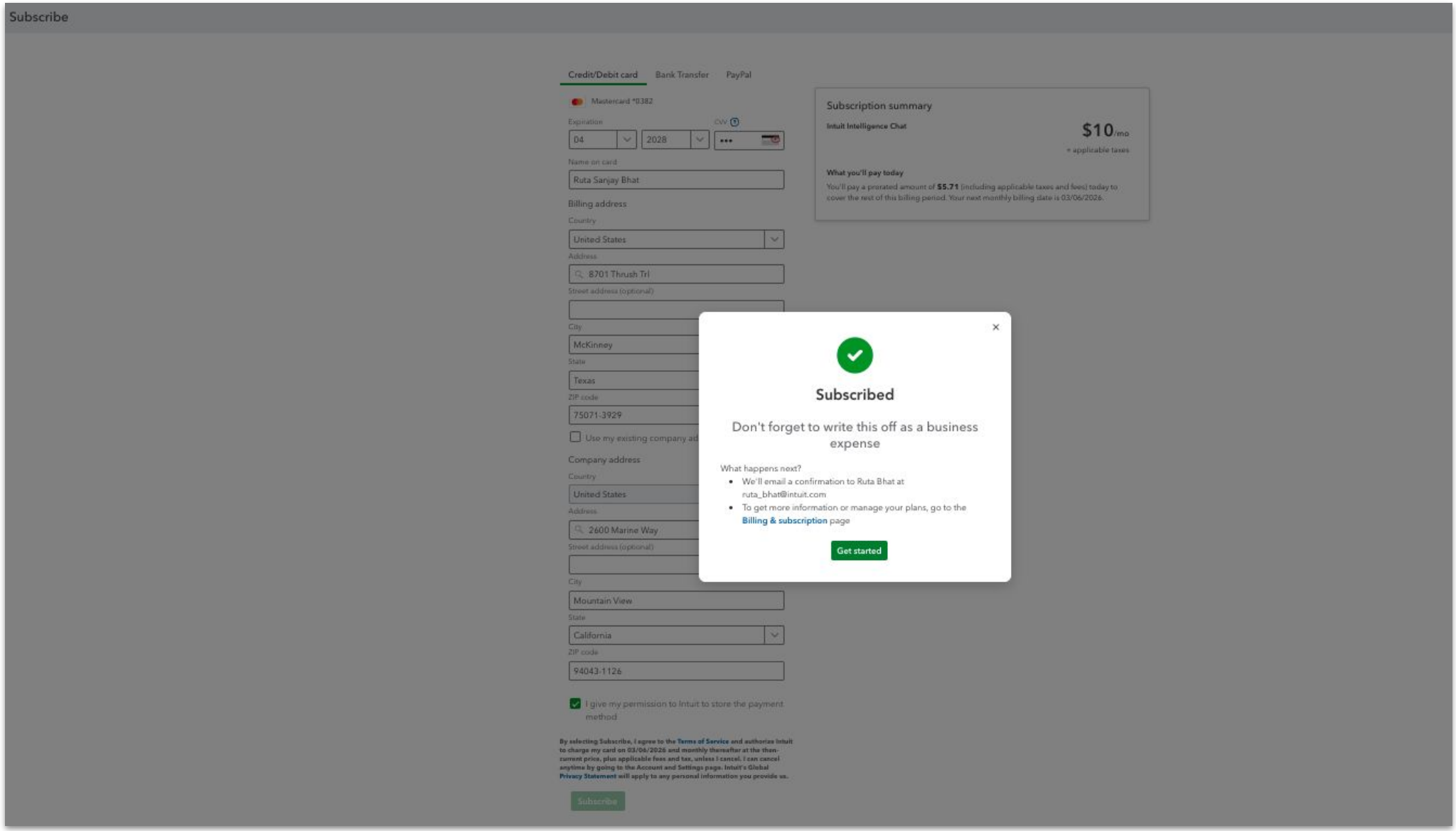
Intuit Intelligence: How can I purchase more prompts?

Visit the Intuit Intelligence Chat Add-on page >> Buy Now >> Choose Address and Save >> Subscribe



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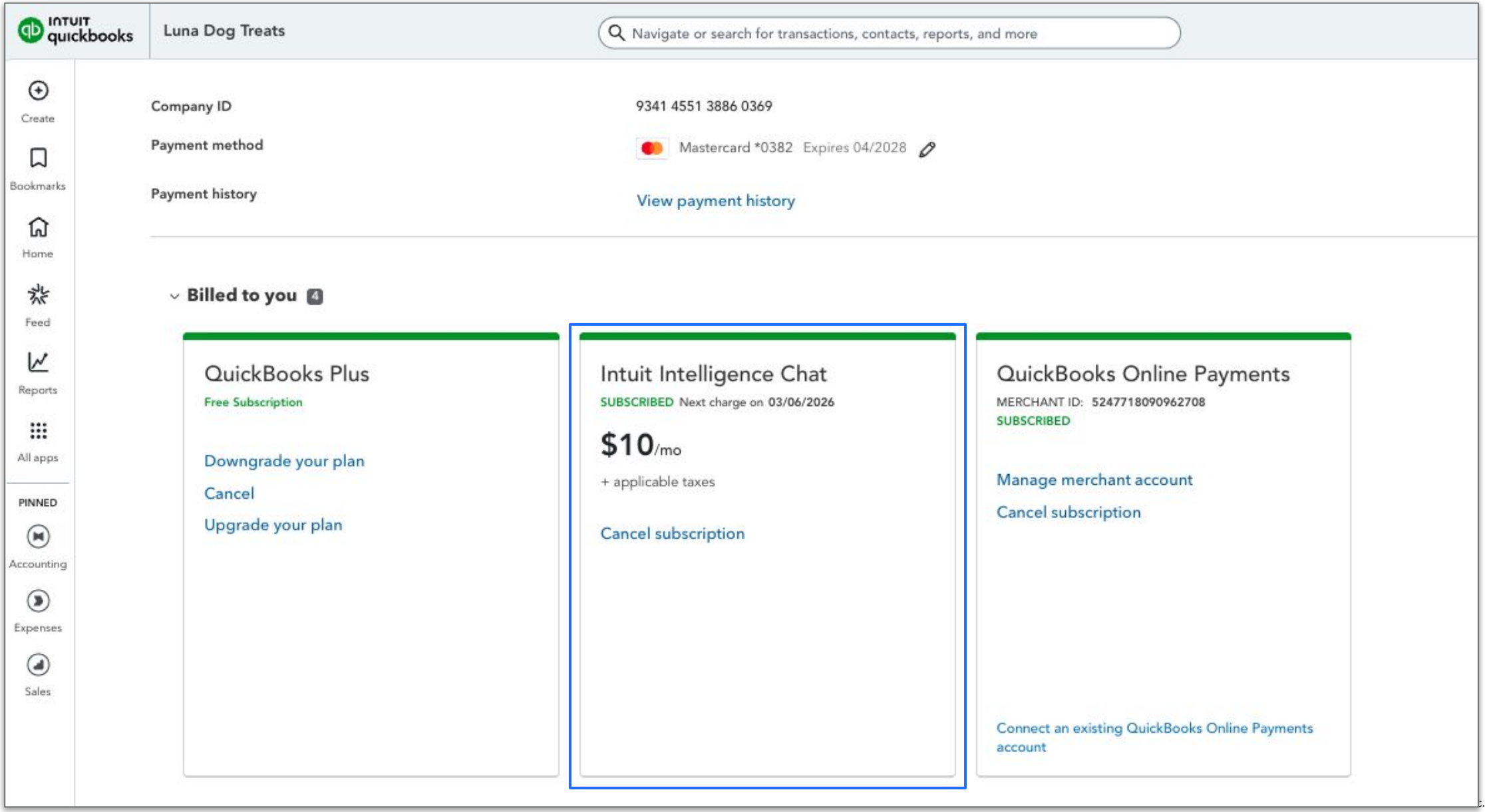
Intuit Intelligence: You can now see the add on purchased in Settings ⚙ >> Subscriptions and Billing

Go to gear icon ⚙ >> click Subscriptions and Billing under Profile



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Better bank feed experiences

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Eric Foster
Staff Product Manager

Team: Core Accounting
Location: Mountain View, CA

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Our Approach

Bank feed improvements

What we heard

Many bookkeepers and accountants spend more time in the bank feed than anywhere else in QuickBooks. Every click matters.

What we did

We continue to improve the new bank feed as we prepare to move everyone to the new version after tax season.

- New, optional warnings for transactions without payees
- Account search
- Check image matching
- Drag and drop attachments
- Reorder columns
- Performance/speed improvements

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Fast facts

Who

Everyone using the new bank feed

How

Opt in if you haven't:
Accounting → Bank transactions → Try new banking page

When

Live as of Feb 2026

Where

All regions and all QBO plans

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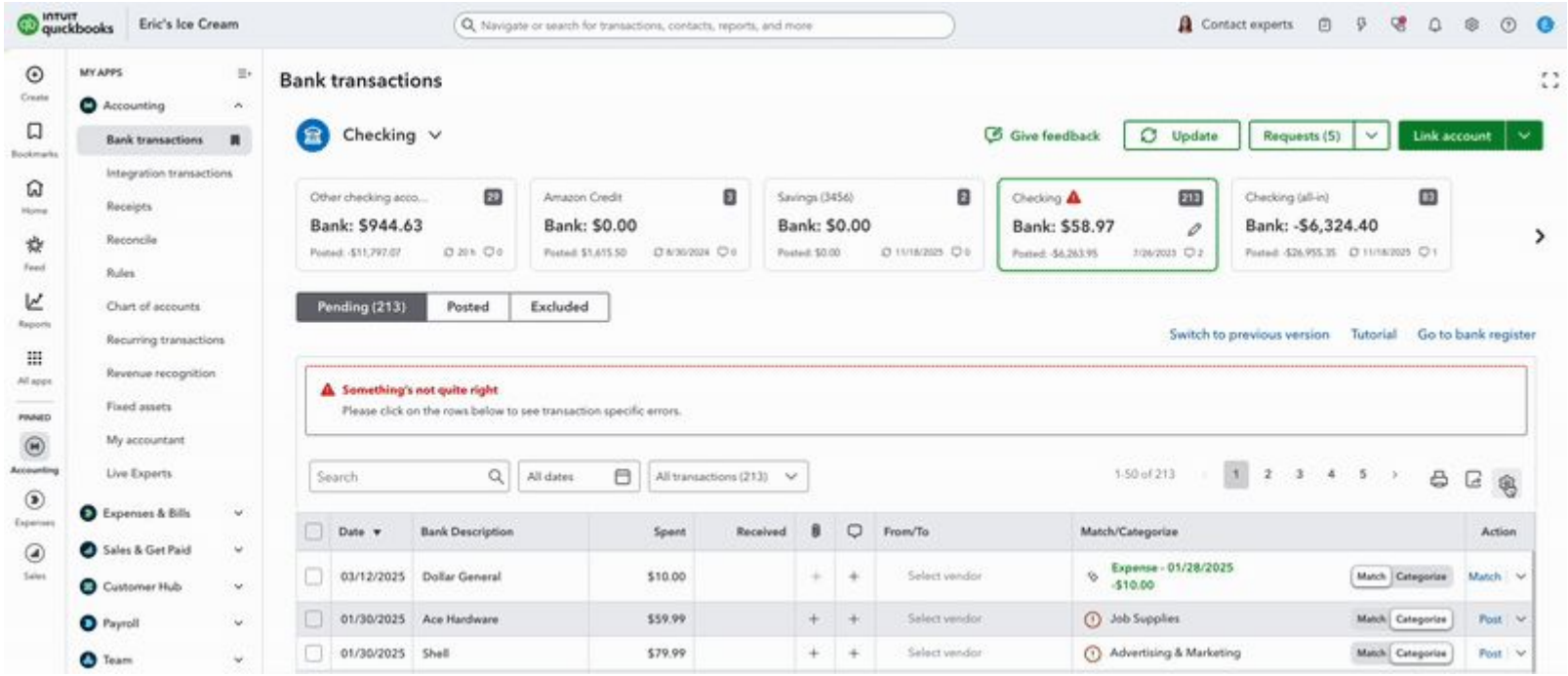
Payee warnings



Learn more on [Canny]

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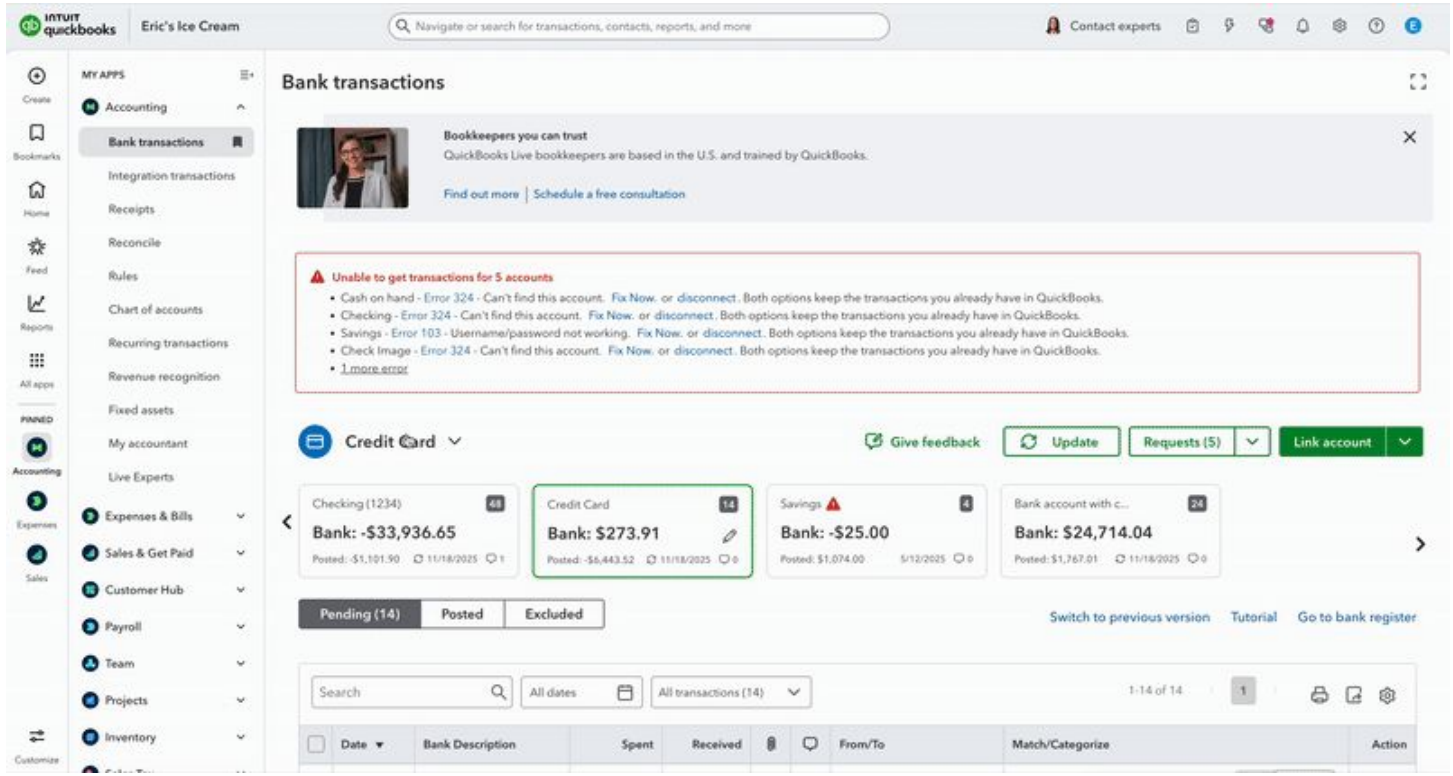
Account search



Learn more on [Canny]

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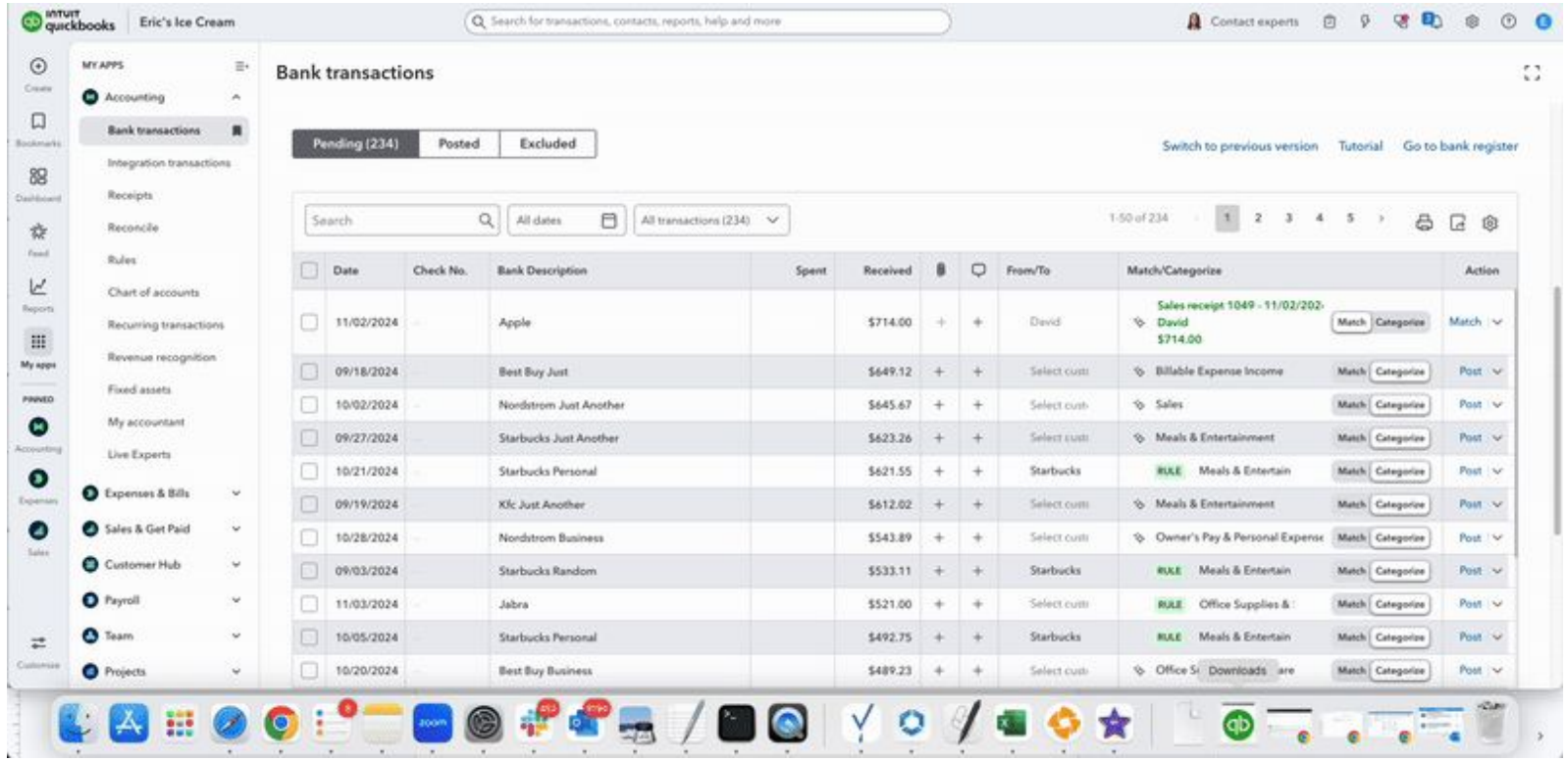
Drag and drop attachments



Learn more on [Canny]

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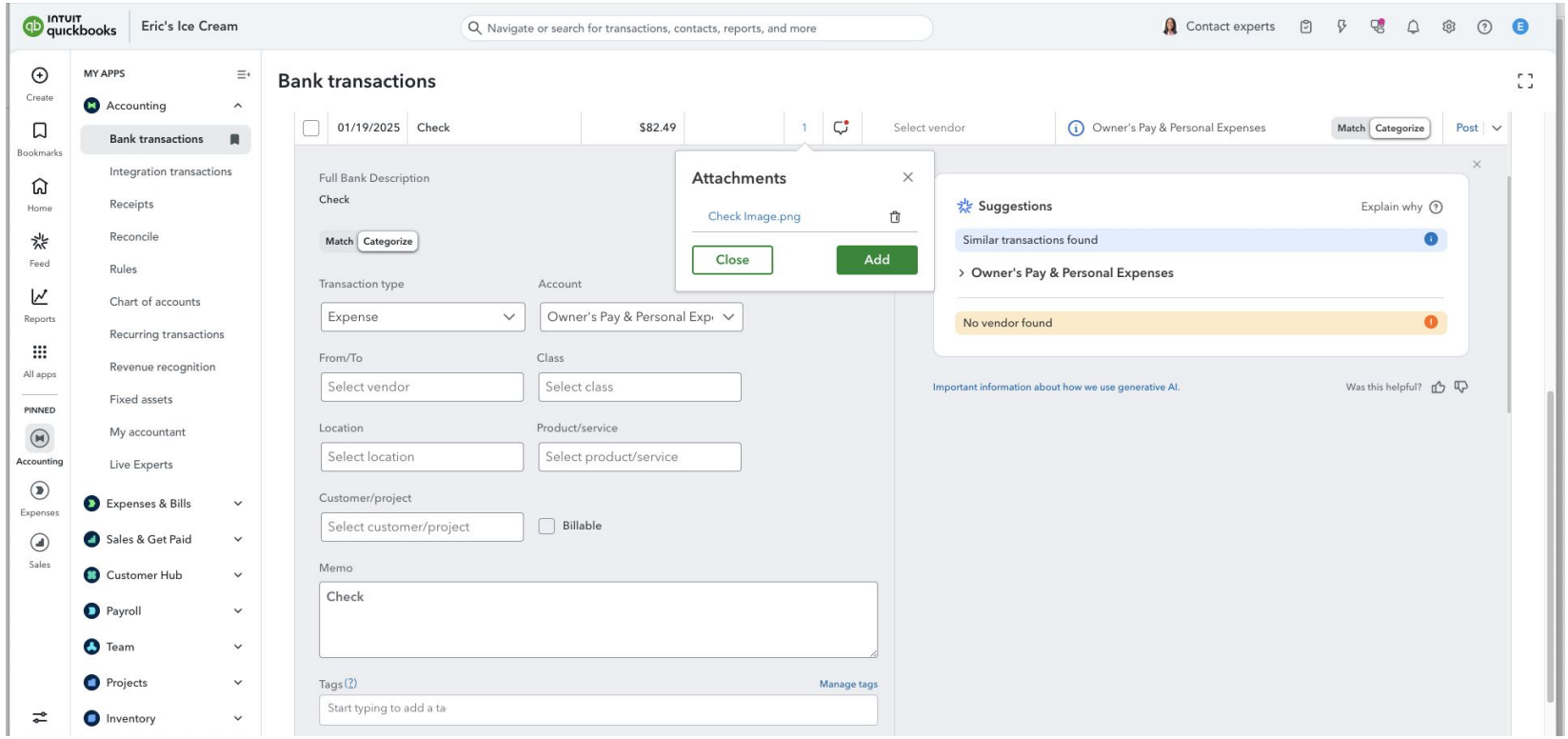
Check image matching



Learn more on [Canny]

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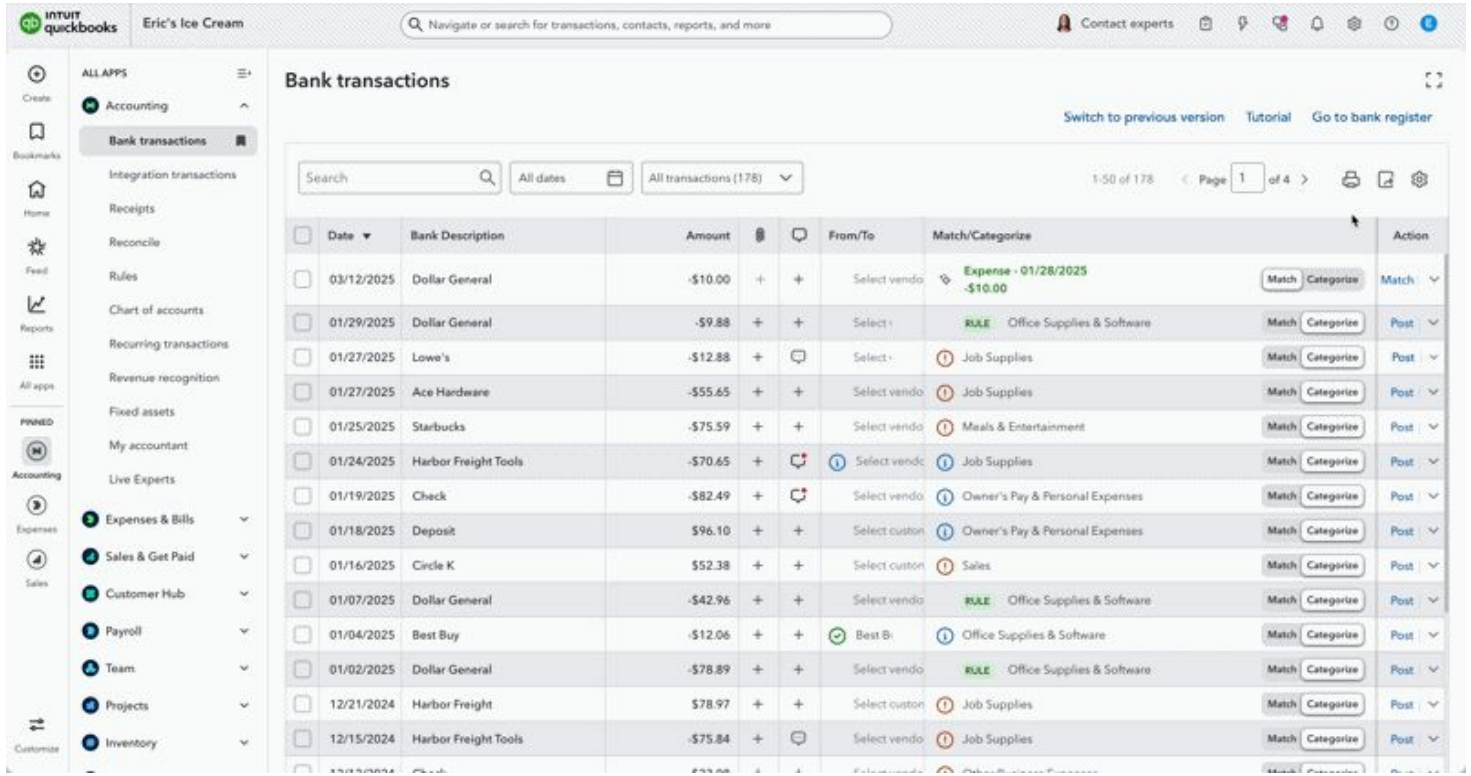
Reorder columns



Learn more on [Canny]

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Performance improvements

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Polling question

Are you/your clients using the new bank feed?

1

Yes, we love it!

2

Yes, but we're still getting used to it

3

No, we didn't like it, so we went back to the old version

post a comment in the Q&A if you want to tell us why!

4

No, we haven't tried it yet

Pro tip: the new bank feed looks different at first, but deep down, a lot has stayed the same. Check out these references if you need help getting started.

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Business Tax AI

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Tricia DelGaudio
Principal Marketing Manager

Team: Product Marketing AI+HI
Location: Mountain View, CA

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Our Approach

Business Tax AI - Deduction Maximizer

What we heard

ProAdvisors want to lower the tax liability of their clients as much as possible, ensuring small businesses keep more of what they earn, with more accurate tax returns and fewer "emergency" adjustments during tax season.

What we did

We've built an AI tool that suggests overlooked tax deductions based on the business type, leveraging LLMs to identify potentially missed deductions (especially from personal accounts), surfacing data the accountant might never have seen.

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Fast facts

Who

QuickBooks customers who are
a designated as a Sole Prop,
S-Corp, or Partnership

How

QBO > Business Tax App >
Overview > Get Tax Ready Checklist

When

BETA to 95% of eligible
QBO customers as of Jan 2026

Where

US

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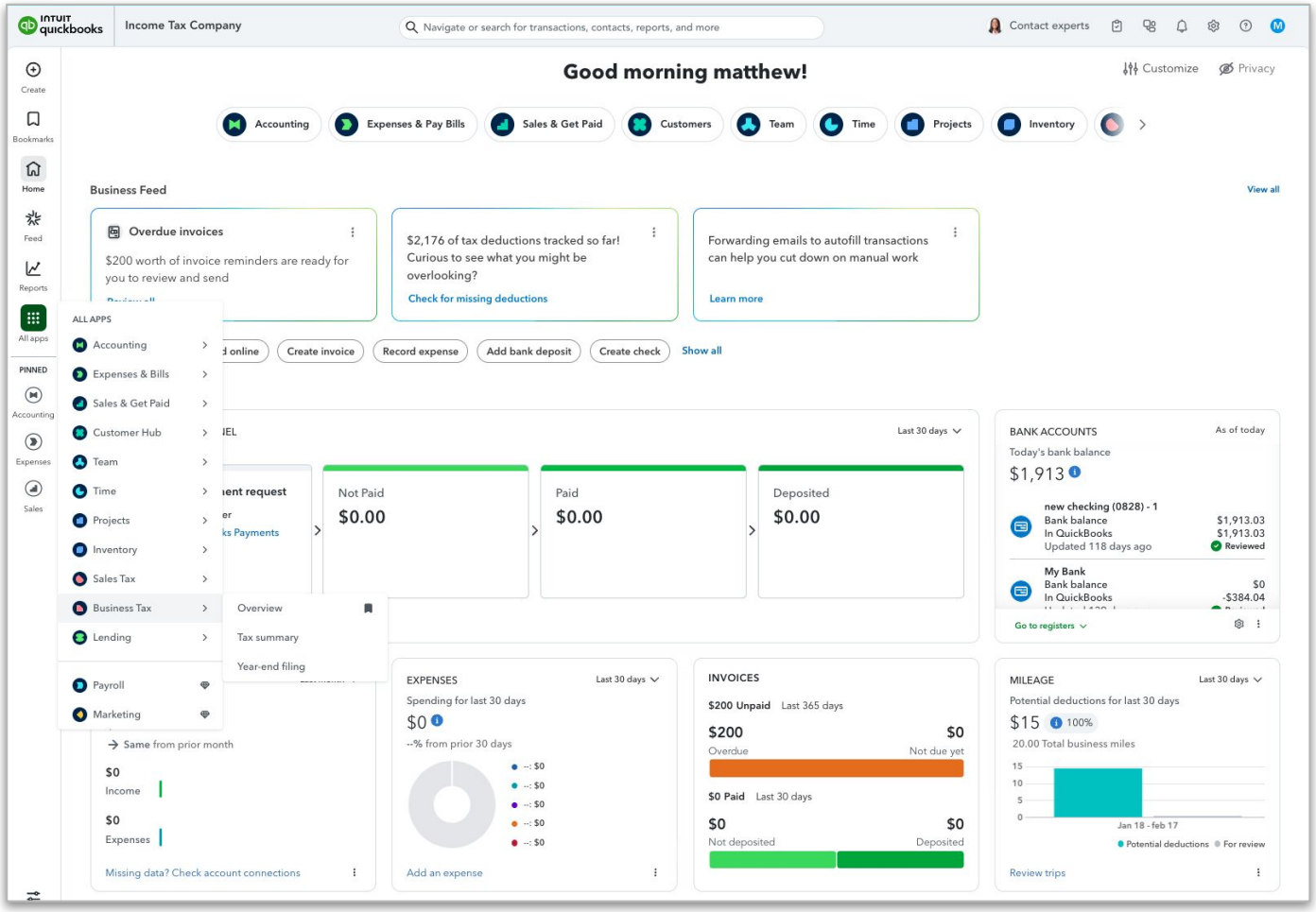
How to access Deduction Maximizer



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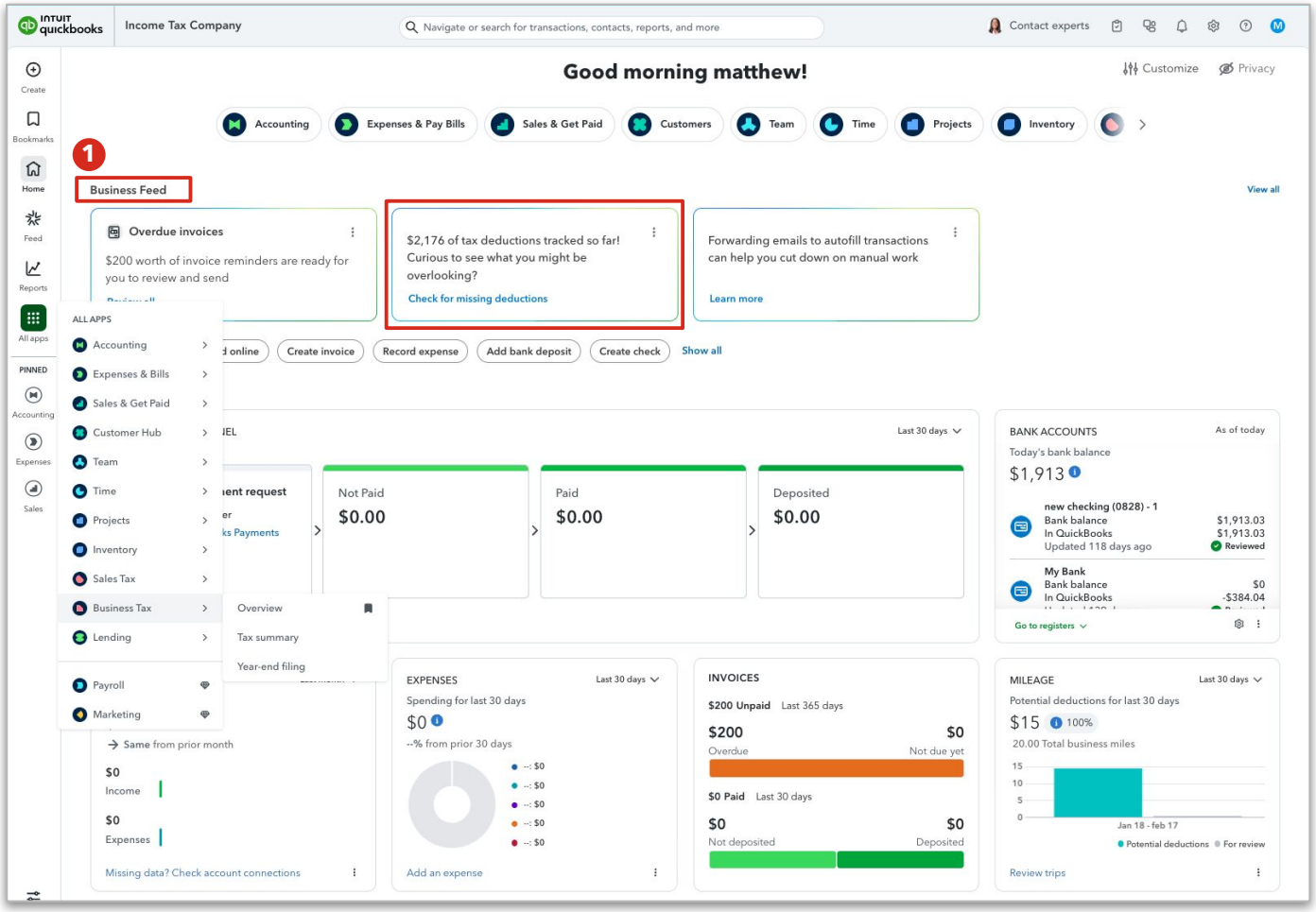
How to access Deduction Maximizer > Business Feed



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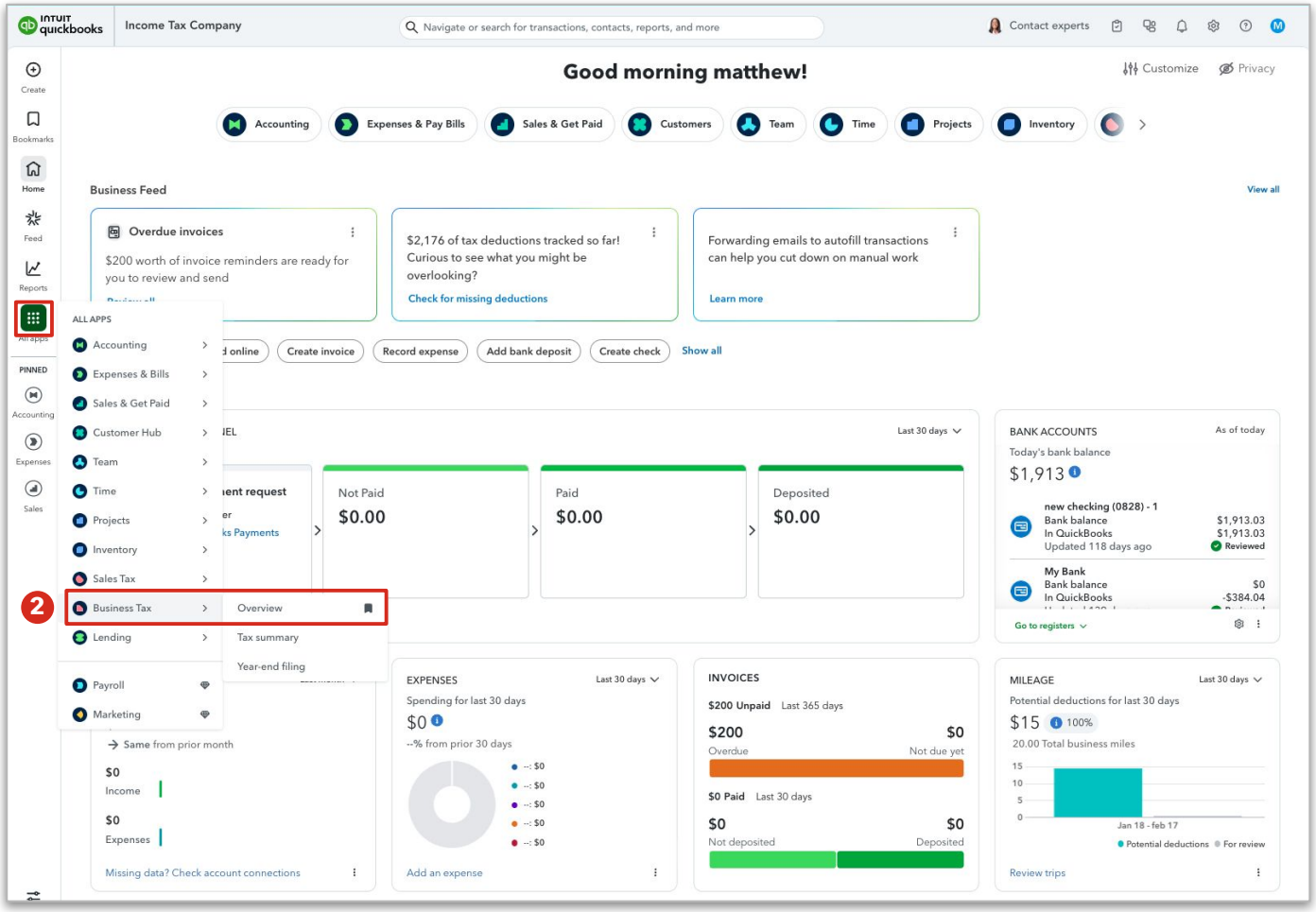
How to access Deduction Maximizer > All Apps > Business Tax > Overview



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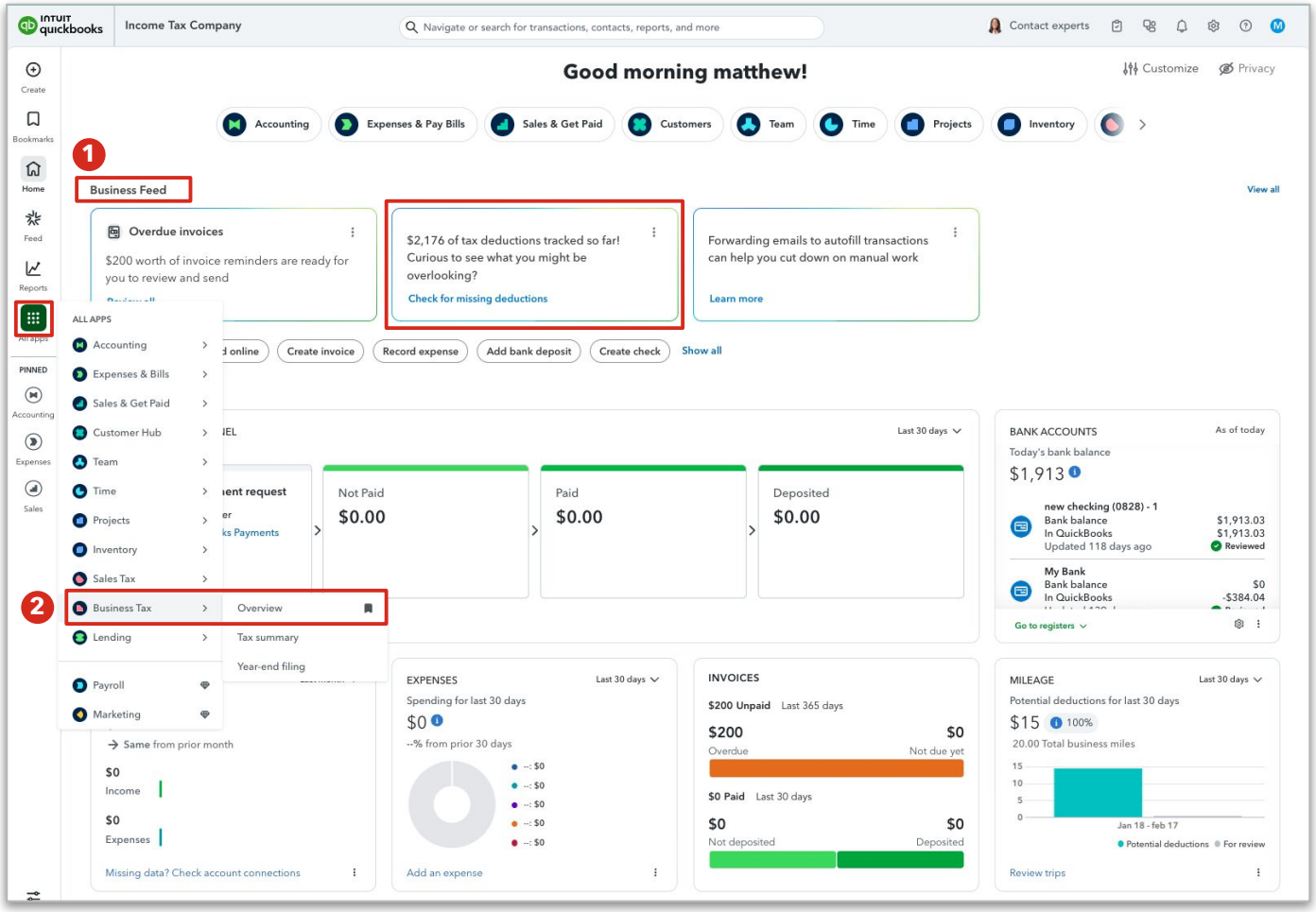
How to access Deduction Maximizer Summary



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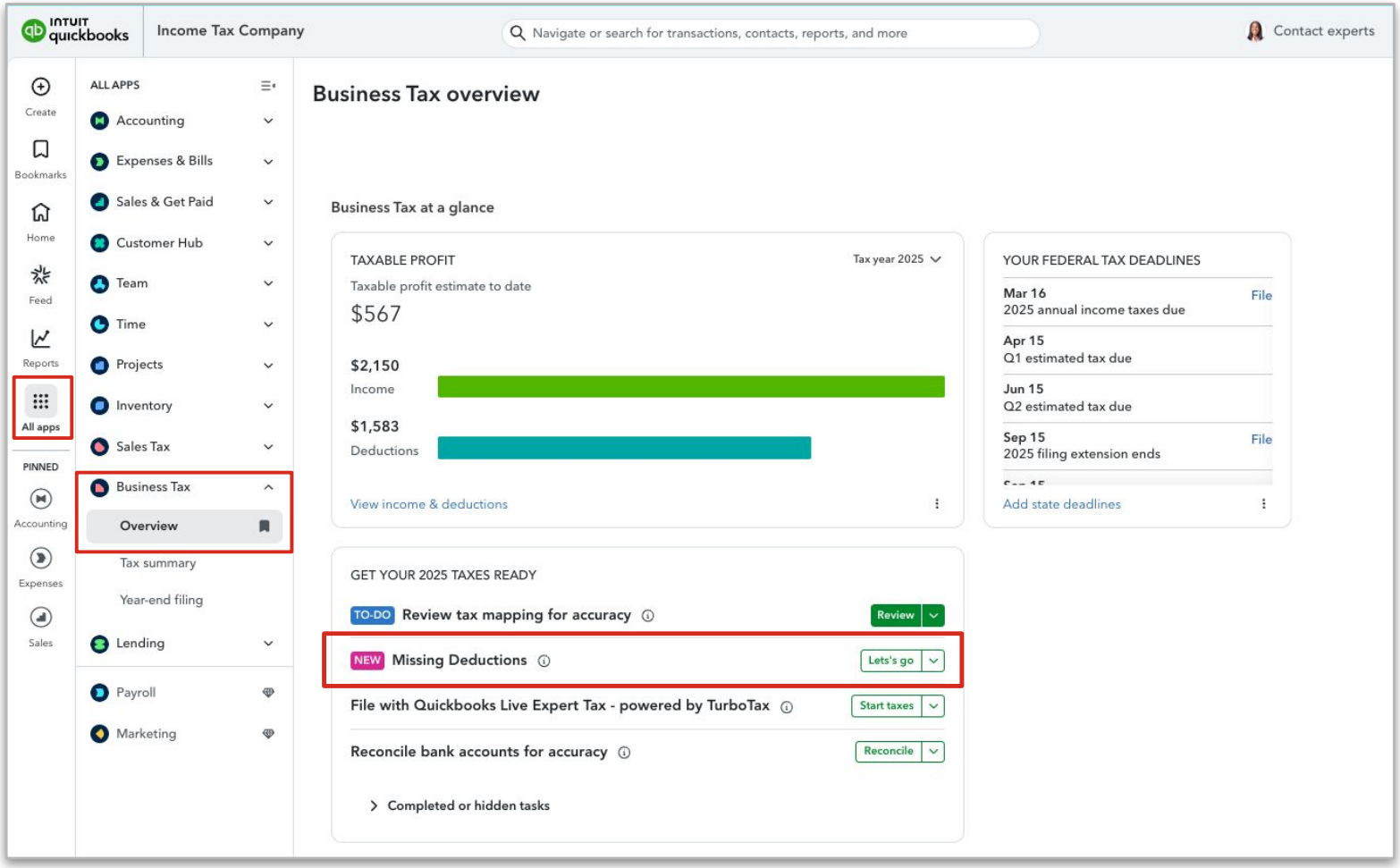
Business Tax App – Overview
Get Your 2025 Taxes Ready



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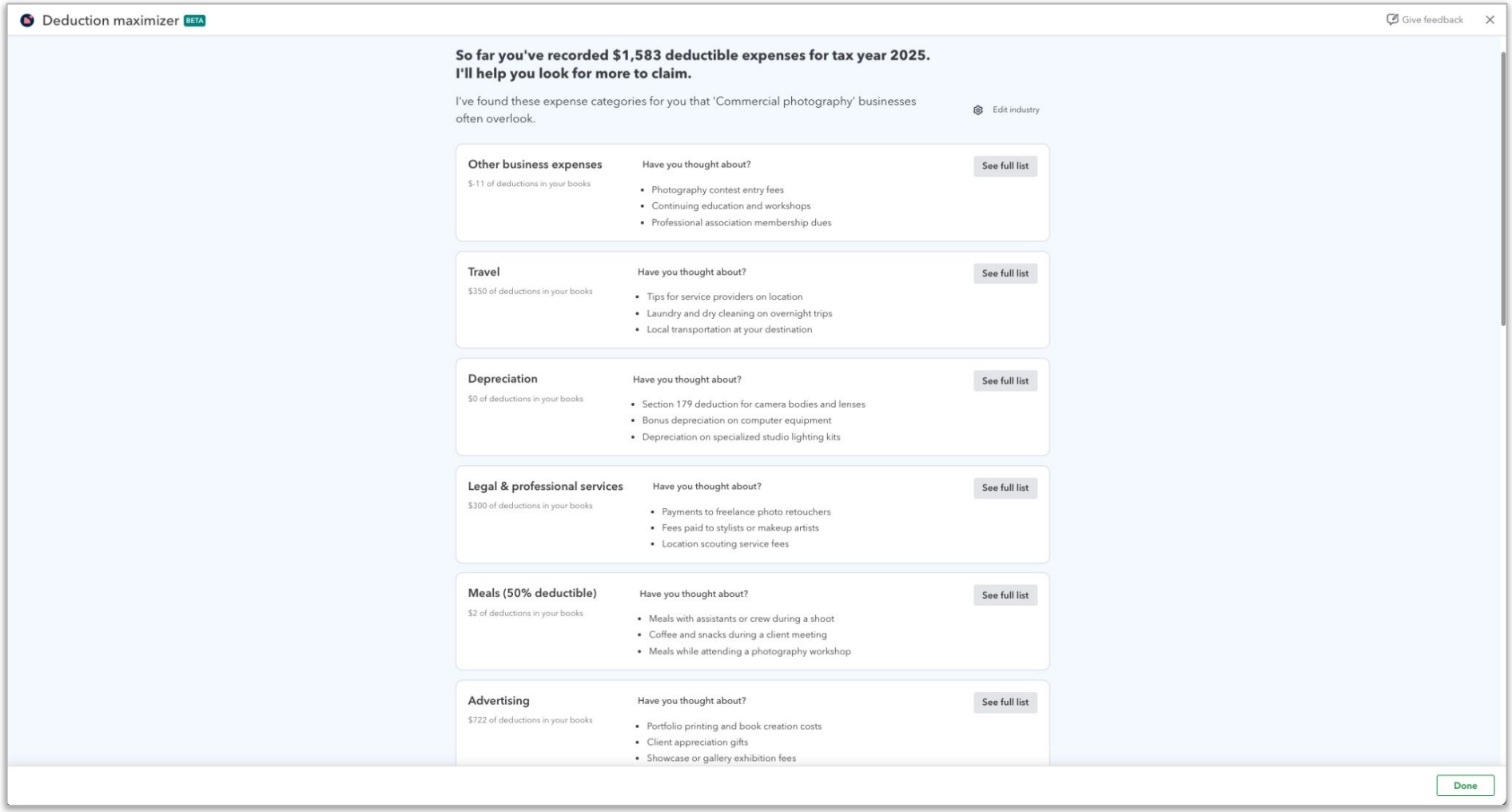
Business Tax AI – Deduction Maximizer

([demo video])



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User groups in Intuit Accountant Suite

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Chandrakant Nimoria
Staff Product Manager

Team: Small Business Group
Location: Mountain View, CA

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Polling question

How are different teams or pods structured/organized within your firm?

1. By service line
2. By industry
3. By geography
4. We don't organize by team or pod

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Our Approach

User Groups

What we heard

For accounting firms, managing client access is currently a one-off process that is very time consuming and does not scale as a firm grows

What we did

In IAS Accelerate, we introduced the ability to create logical groupings of clients and team members to manage access at scale rather than one-by-one through **User Groups**

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Fast facts

Who

Any accounting firm using Intuit Accountant Suite Accelerate

How

Navigate to User Groups under Team and click ‘Create new user group’

When

Open beta starting in early March!

Where

US, Canada, UK and Australia

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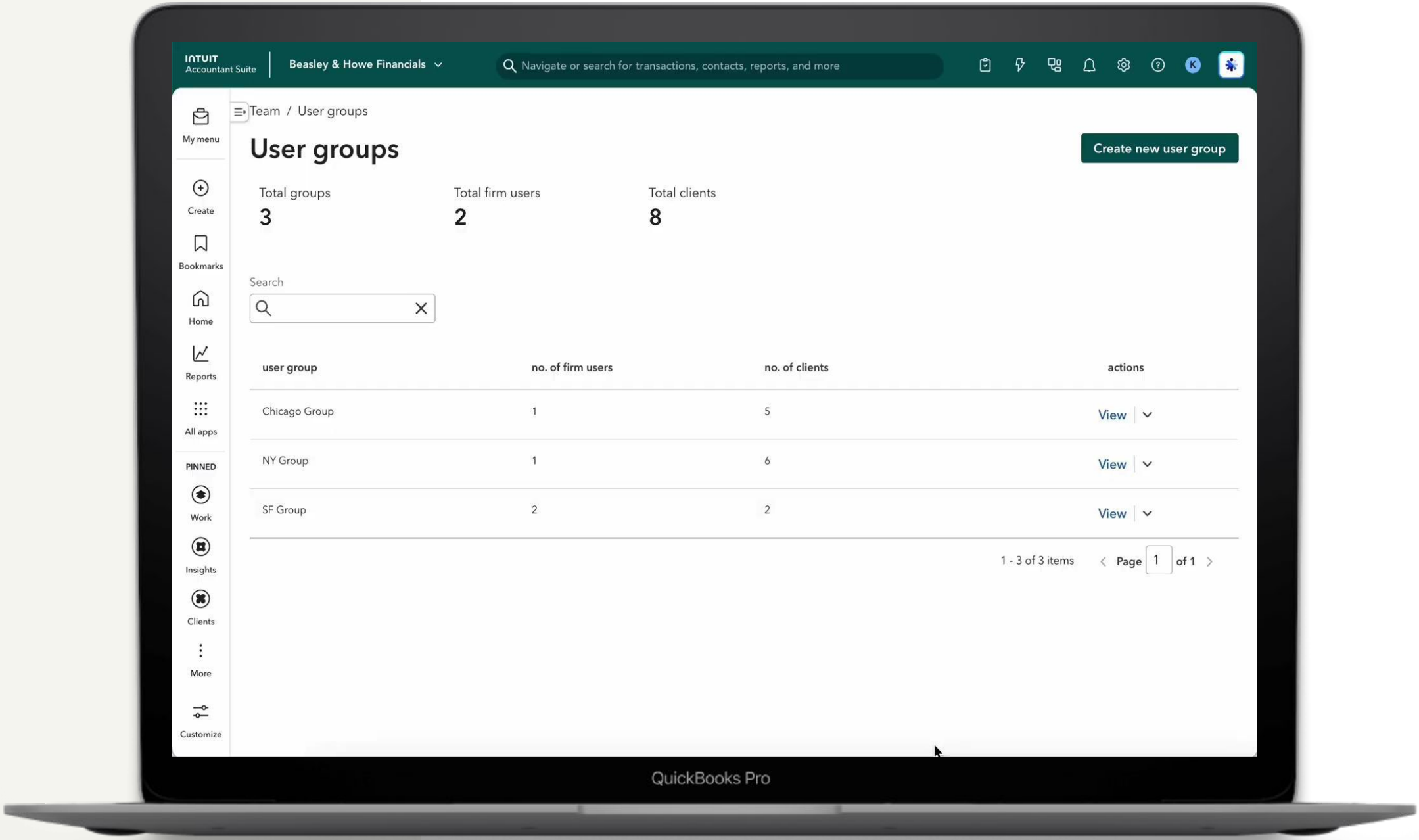
INTUIT
Accountant Suite
Beasley & Howe Financials
Navigate or search for transactions, contacts, reports, and more
My menu
Create
Bookmarks
Home
Reports
All apps
PINNED
Work
Insights
Clients
More
Customize
Team / User groups
User groups
Create new user group
Total groups
3
Total firm users
2
Total clients
8
Search
user group
no. of firm users
no. of clients
actions
Chicago Group
1
5
View
NY Group
1
6
View
SF Group
2
2
View
1 - 3 of 3 items
Page 1 of 1
QuickBooks Pro

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Polling question

How do you currently feel about the level of client access your firm users have?

1

Completely confident; we have the right permissions for all users to access clients

2

A little bit nervous, I trust my team but to move fast, we grant broad permissions

3

Stressed, we conduct audits regularly

4

This isn't relevant to my firm

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What's around the corner?

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On the books schedule

Be sure to check out these recent episodes:

- Sasan Goodarzi, Intuit's CEO
- Upskilling 1 million students

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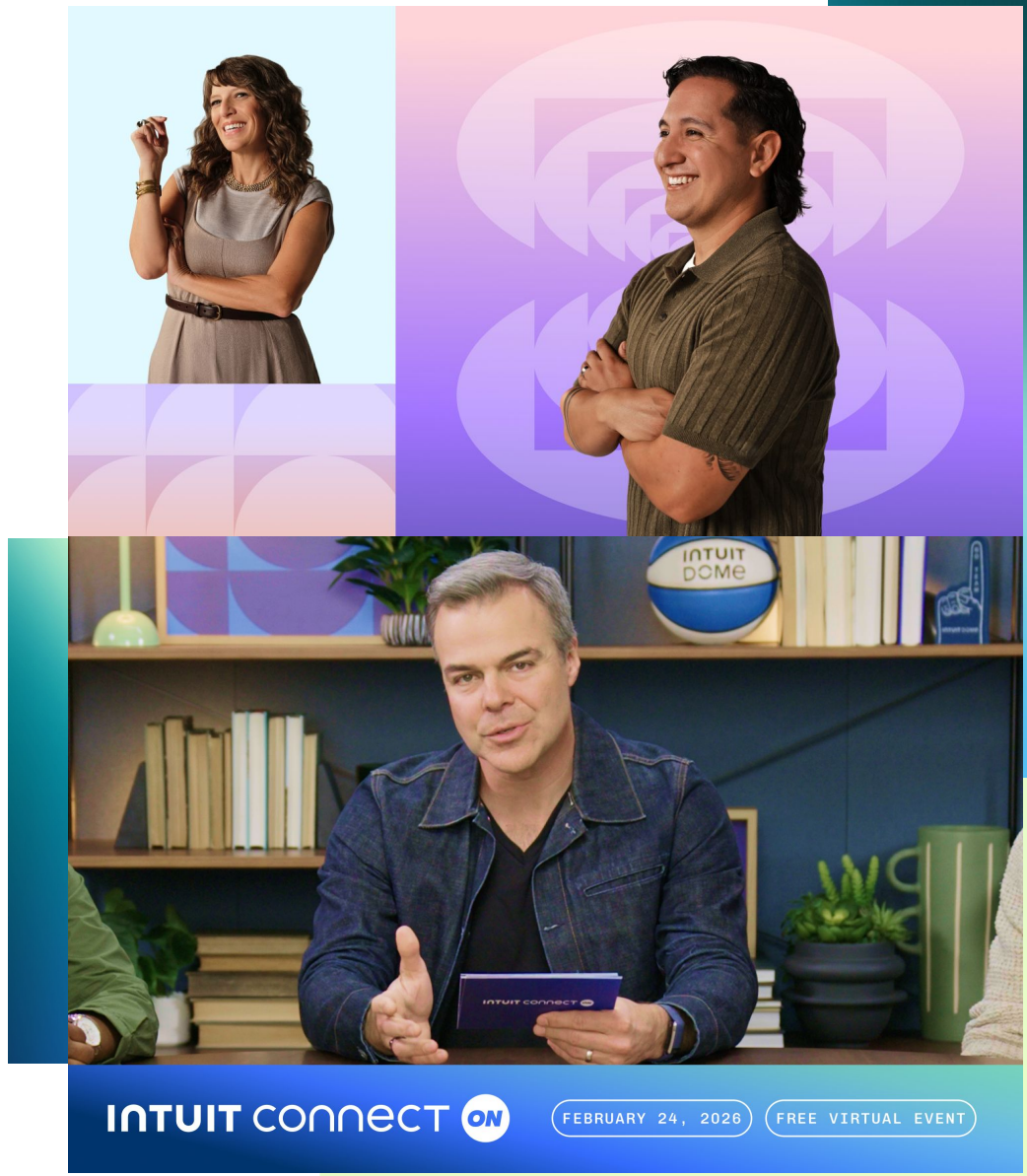
Join us February 24 for Intuit Connect ON

Register now to discover the latest product updates designed to scale, improve collaboration, and support more strategic client advisory across Intuit Intelligence, Intuit QuickBooks, Intuit Accountant Suite, and Intuit Enterprise Suite. You'll have the opportunity to earn a CPE credit, hear from Intuit leaders, and gain insights from our special guest speaker, Dave Olsen, Co-founder and CEO at Nimbl.

Join us on Tuesday, February 24 9-11am PT, for our next quarterly event.

Register at
https://events.intuit.com/intuitconnect-on



INTUIT ProAdvisor

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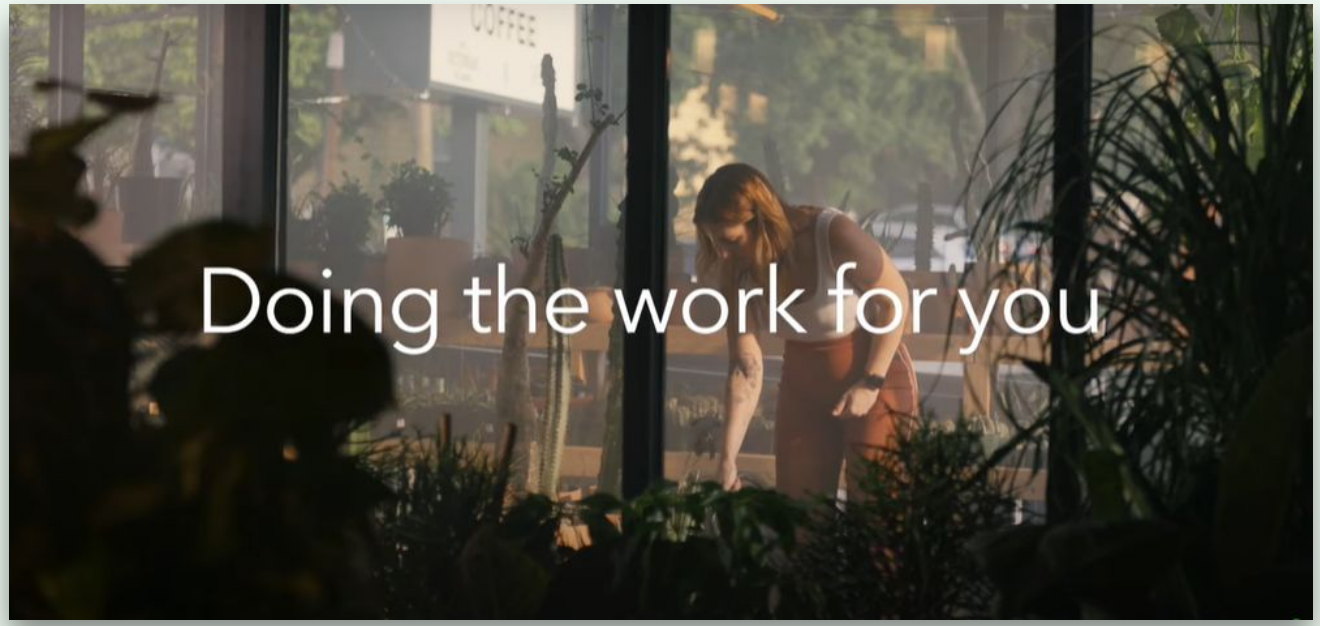
Resources

Automation where it counts. Human when it matters.

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

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



Visit our blog to learn more

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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
2. Intuit Intelligence
3. Intuit Accountant Suite
4. No, thank you. I would not like to be contacted.

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Our next webinar is coming up in March

Date:
March 19, 2026

Time:
11am PST / 2pm EST

Register

INTUIT ProAdvisor
IN THE KNOW

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Thank you

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KNOW

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