

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

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

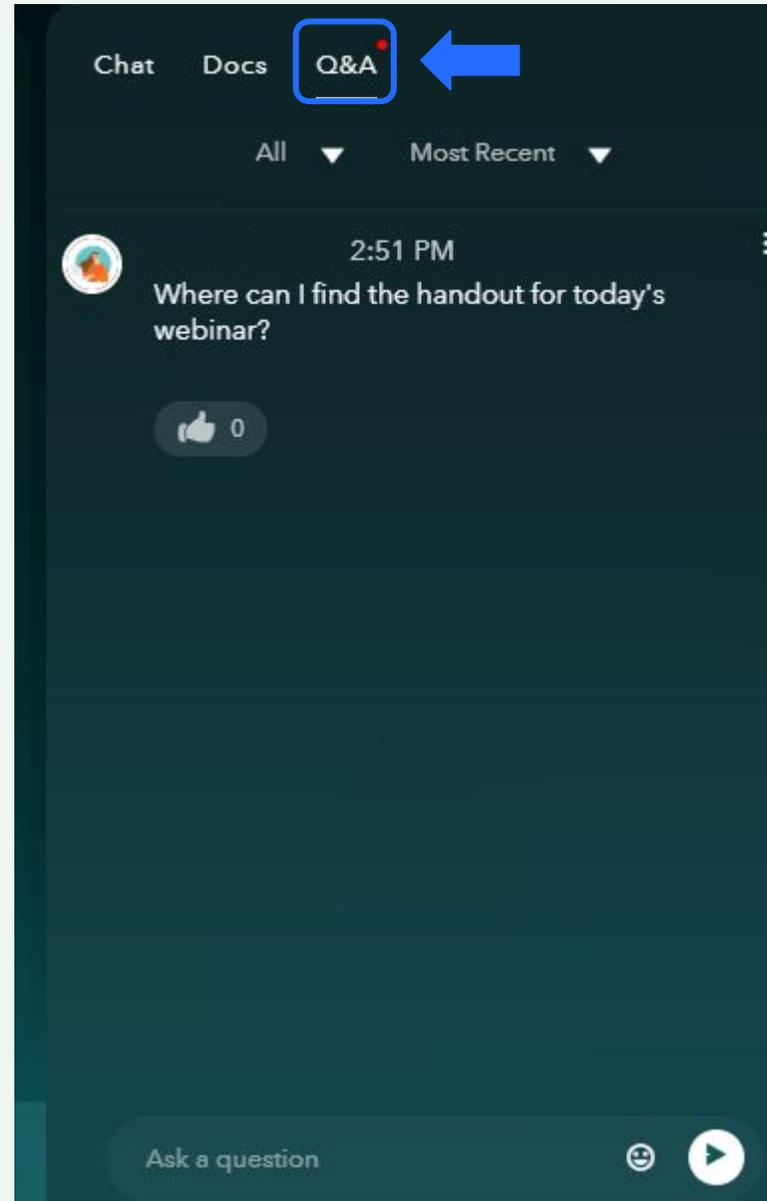
Questions & feedback

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

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

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

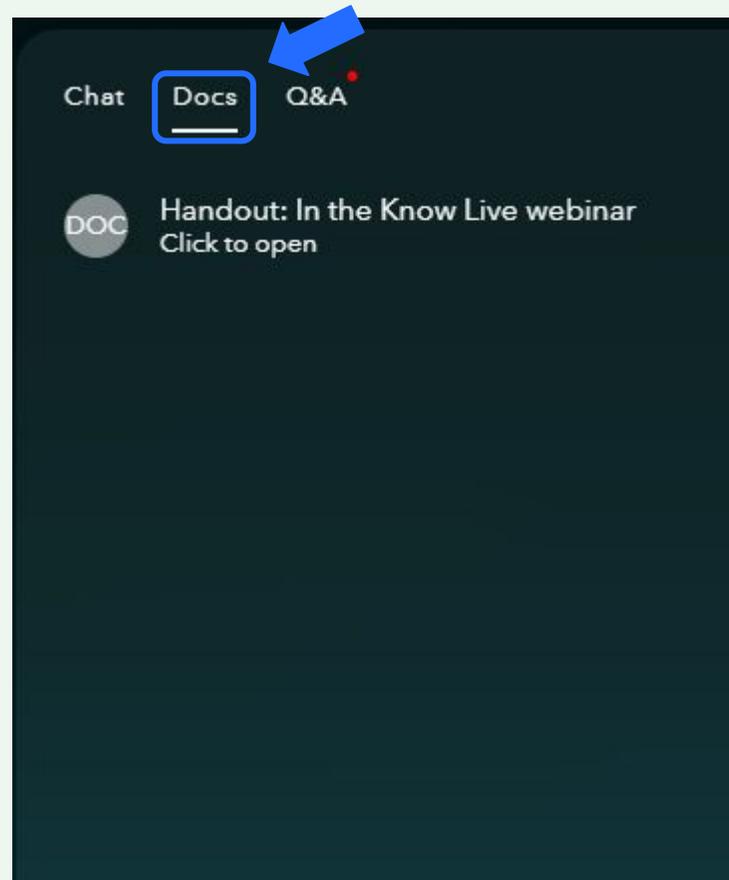
Chat is not enabled for audience members.



Supporting materials

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

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



Polling questions

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

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

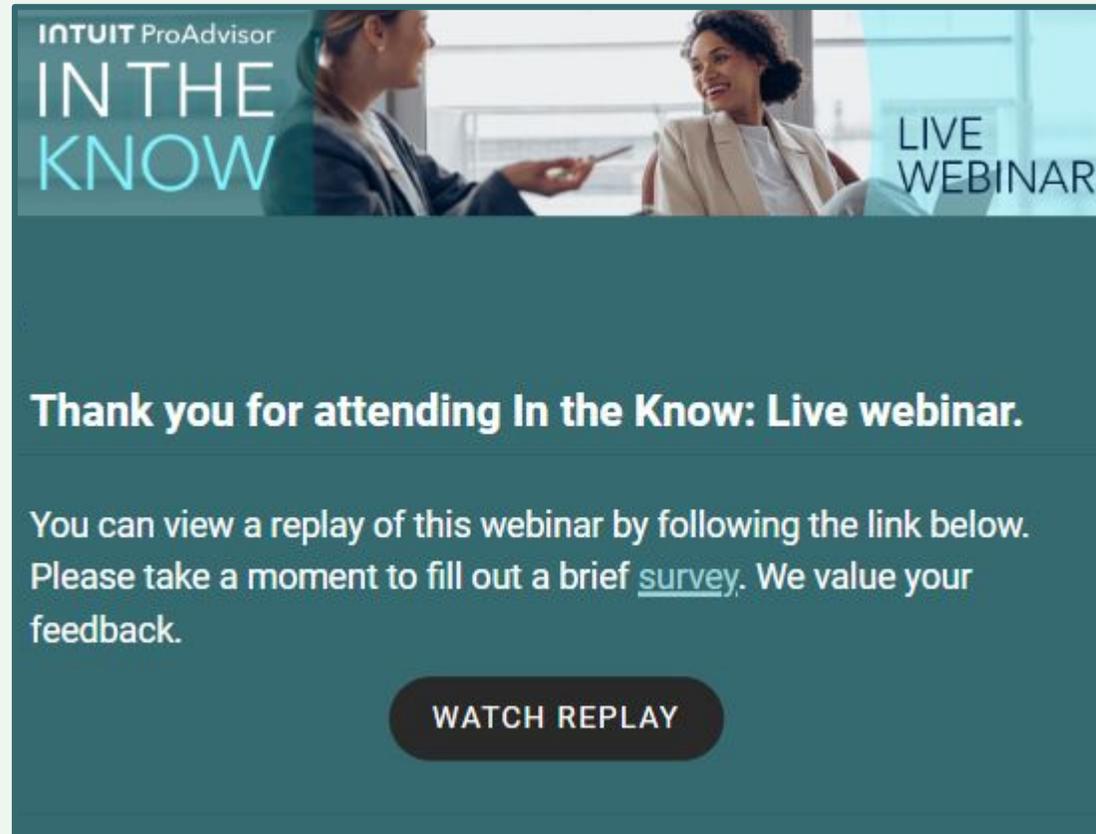
The screenshot displays the Intuit ProAdvisor interface with a dark theme. At the top, there are navigation tabs: 'Chat', 'Poll', 'Docs', and 'Q&A'. The 'Poll' tab is highlighted with a blue box and a red dot, and a blue arrow points to it. Below the tabs, a poll question is displayed: 'Do your clients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

Session recording

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

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

CPE is not issued for on-demand recordings.

A dark teal rectangular slide with a white header image. The header image shows two women in business attire talking, with the text 'INTUIT ProAdvisor IN THE KNOW' on the left and 'LIVE WEBINAR' on the right. Below the image, the text reads: 'Thank you for attending In the Know: Live webinar.' followed by 'You can view a replay of this webinar by following the link below. Please take a moment to fill out a brief [survey](#). We value your feedback.' At the bottom center is a dark teal button with the text 'WATCH REPLAY' in white.

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

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



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

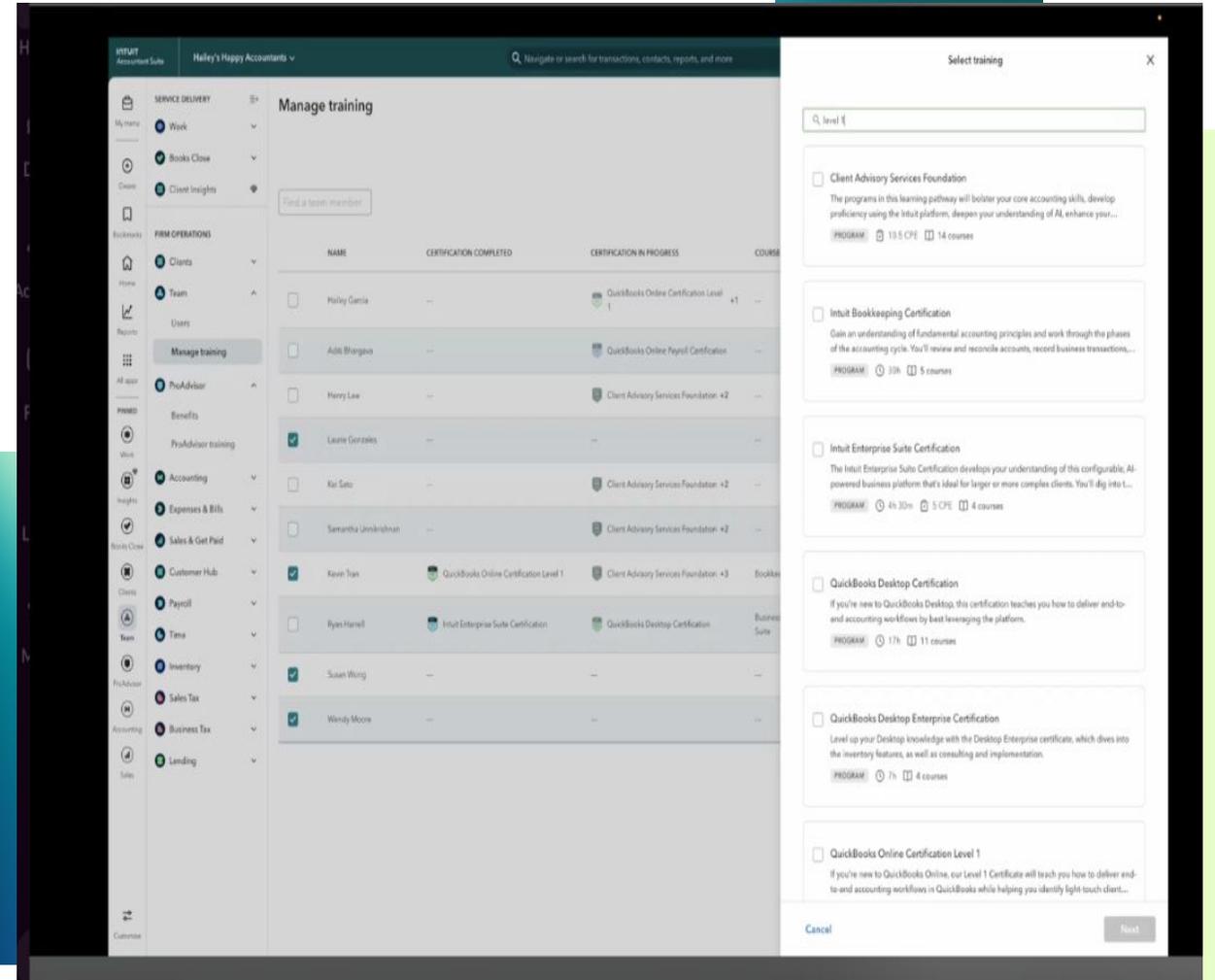
New: Assign & Track Training with Visibility

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



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.

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Explore specialized apps that extend QuickBooks for deeper automation, industry-specific needs, and custom workflows.

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Gain practical, immediately implementable strategies to elevate your firm and grow with confidence.

Register today at:

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INTUIT ProAdvisor



The Ledger-Centric Close: How Leading CAS Firms Are Preparing for 2026

From disconnected tools to ledger-connected execution.

Thursday, February 26, 2026

double



How to Build Custom Business Systems on a QuickBooks Foundation

Design workflows that fit you and your clients, without leaving QuickBooks.

Thursday, March 12, 2026

method

REGISTER



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.



Your invoice is ready!

Due on Nov 22, 2025

\$483.75

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

View and pay



Hi Kim, we appreciate your business. Please find your invoice details here. Feel free to contact us if you have any questions.

Have a great day!

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

Intuit Enterprise Suite releases

Jed McLoughlin

Group Manager Marketing

Team: Mid-Market

Location: Mountain View, CA



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

Fast facts

Who

Intuit Enterprise Suite
Subscribers

When

Live as of February 11, 2026

How

Intuit Enterprise Suite > Gear Icon >
What's New

Where

US

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* 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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* 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*

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

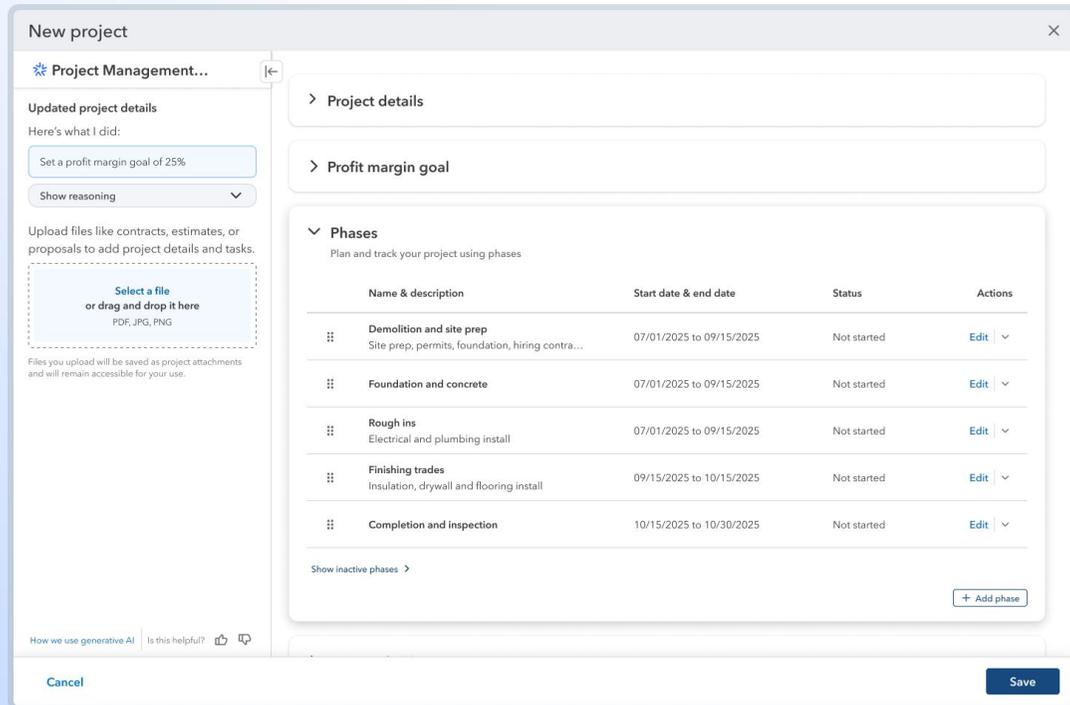


AIA style invoicing



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

Construction budget   View project  

Group by: Select groupi... Filters Search Customize

Group by	Product/service	Description	Quantity	Unit cost	Estimated cost	Cost group	Phase	Action	
None	Footings & Piers...	Essential com...	30	\$980.00	\$29,400.00	Material	Foundation &...	 	
Phase	Interior demo	Selective remo...	35	\$2,450.75	\$85,776.25		Foundation &...	 	
Cost group	Site clearing	Removal of all...	40	\$80.00	\$3,200.00	Labor (Inactive)	Demolition & s...	 	
	Slab Foundation...	20A arc fault b...	15	\$150.00	\$2,250.00	Labor (Inactive)	Demolition & s...	 	
	Framing	Framing walls...	1000	\$55.30	\$5,000.00	Material	Framing	 	
	Lighting fixture	Track light fixt...	55	\$5,000.00	\$275,000.00	Material	Electrical	 	
	Structural steel	Steel posts an...	55	\$5,000.00	\$275,000.00	Equipment	Framing	 	
	Rough electrical	Run undergro...	60	\$1,999.99	\$119,999.40	Labor (Inactive)	Electrical	 	
Total Product/service					\$588,650.65				

 Version history 

What

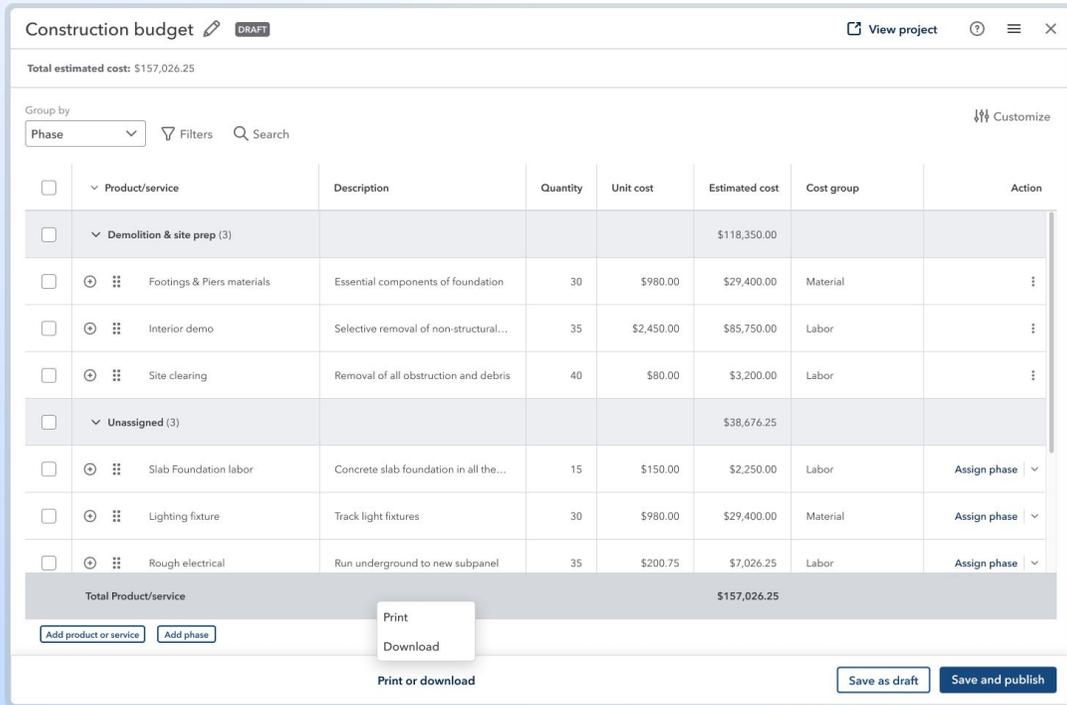
Within your list of products and services, designate industry-standard cost groups such as labor, materials, equipment, subcontractor, or miscellaneous. You can also track cost groups across budgets, expenses, POs, and bills. For example, filter key reports by cost groups to compare estimated versus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



Construction budget View project

Total estimated cost: \$157,026.25

Group by: Phase Customize

<input type="checkbox"/>	Product/service	Description	Quantity	Unit cost	Estimated cost	Cost group	Action
<input type="checkbox"/>	Demolition & site prep (3)				\$118,350.00		
<input type="checkbox"/>	Footings & Piers materials	Essential components of foundation	30	\$980.00	\$29,400.00	Material	
<input type="checkbox"/>	Interior demo	Selective removal of non-structural...	35	\$2,450.00	\$85,750.00	Labor	
<input type="checkbox"/>	Site clearing	Removal of all obstruction and debris	40	\$80.00	\$3,200.00	Labor	
<input type="checkbox"/>	Unassigned (3)				\$38,676.25		
<input type="checkbox"/>	Slab Foundation labor	Concrete slab foundation in all the...	15	\$150.00	\$2,250.00	Labor	Assign phase
<input type="checkbox"/>	Lighting fixture	Track light fixtures	30	\$980.00	\$29,400.00	Material	Assign phase
<input type="checkbox"/>	Rough electrical	Run underground to new subpanel	35	\$200.75	\$7,026.25	Labor	Assign phase
Total Product/service					\$157,026.25		

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.

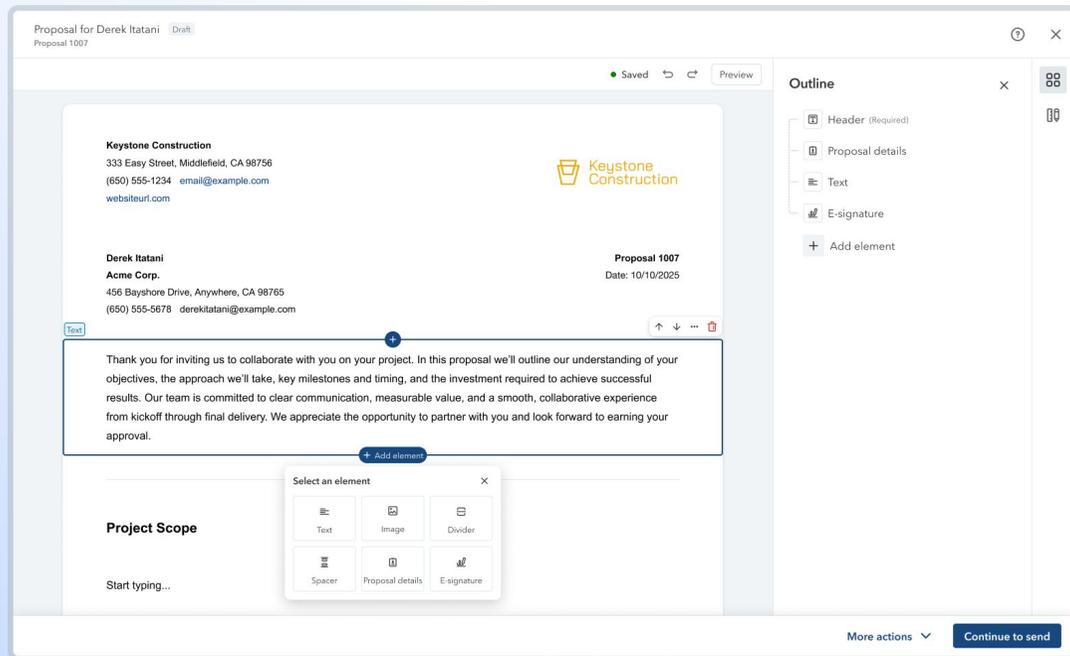
Plus, for businesses upgrading from QuickBooks Advanced or QuickBooks Desktop, project budgets are automatically created during migration. Your existing project cost data will be carried over so your teams can start managing budgets from day 1.

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

Change order 1001

Total change in cost: -- Total change in income: -- Previous profit margin: 0.00% Estimated profit margin: 0.00%

CHANGE ORDER

Gorman Inc
789 Pearl Avenue
Uptown, WY 87654
Edit company

Negative_CO
Enter customer email

Cc/Bcc

Bill to: Hamilton Landscape

Change order no.: 1001
Change order date: 2025-09-30
Expiration date: YYYY-MM-DD

Accepted by: []
Accepted date: YYYY-MM-DD

#	Product/Service	Description	Qty	Unit cost (hidden)	Markup% (hidden)	Customer rate	Customer total
1	Land Patch-Dark Gr...	Land patch	-500	0.00		70	

Note to customer: Thank you for your business.

Memo on statement (hidden): This memo will not show up on your change order, but will appear on the statement.

Attachments

Subtotal: -\$35,000.00
Sales tax: Set up
Discount: 0%
Shipping: 0.00
Change order total: -\$35,000.00

Linked estimate

Estimate #1001
Date: Sep 30, 2025
Total: 393.00

Consulting Service
Amount: \$123.00
Rate: \$123.00
Quantity: 1

Demo & site prep
Amount: \$200.00
Rate: \$200.00
Quantity: 1
Description: Demolition and site preparation for the...

Land Patch: Dark Green/8x8
Amount: \$28,000.00
Rate: \$70.00
Quantity: 400
Description: Land patch

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:

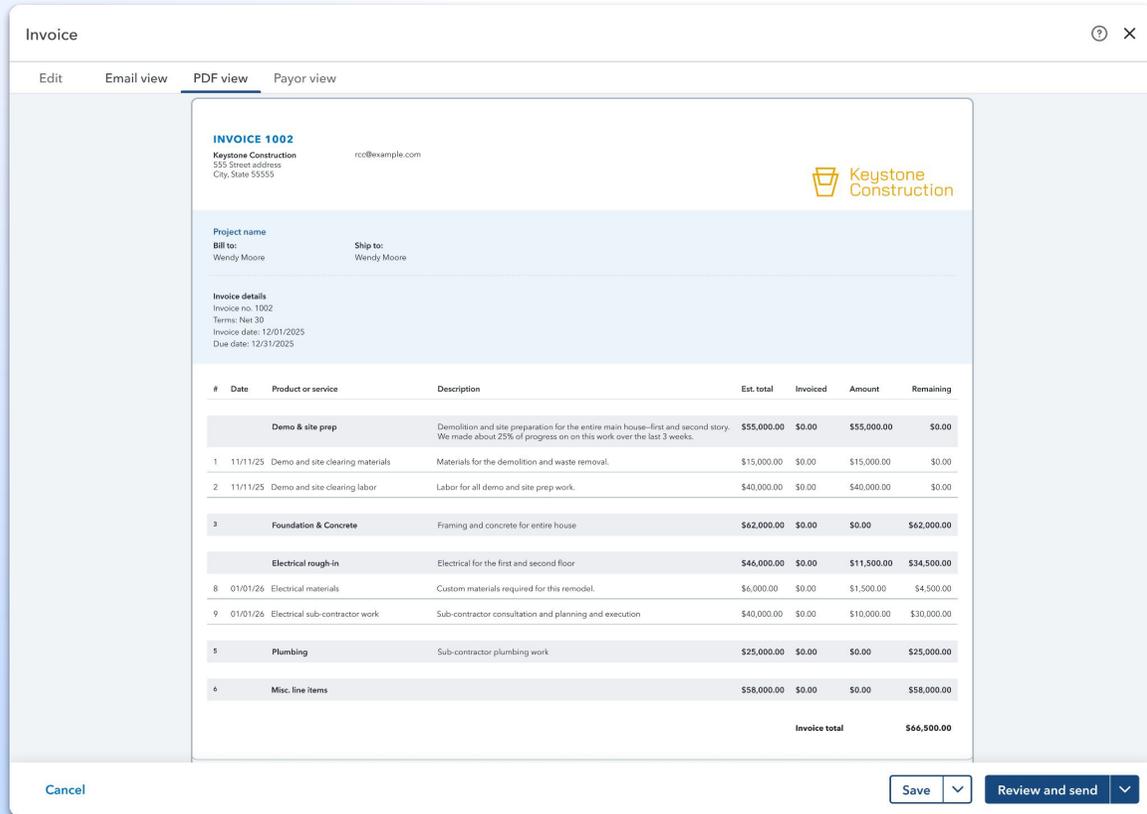
- ✓ Add or remove products or services from a project estimate within the same change order
- ✓ Create and manage net-negative change orders (total less than \$0)
- ✓ Adjust project estimate income by subtracting amounts specified in accepted negative change orders
- ✓ Prevent project estimates from 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



INVOICE 1002
Keystone Construction
555 Street address
City, State 55555
rc@example.com

Project name
Bill to: Wendy Moore
Ship to: Wendy Moore

Invoice details
Invoice no. 1002
Terms: Net 30
Invoice date: 12/01/2025
Due date: 12/31/2025

#	Date	Product or service	Description	Est. total	Invoiced	Amount	Remaining
Demo & site prep				\$55,000.00	\$0.00	\$55,000.00	\$0.00
Demolition and site preparation for the entire main house—first and second story. We made about 25% of progress on on this work over the last 3 weeks.							
1	11/11/25	Demo and site clearing materials	Materials for the demolition and waste removal.	\$15,000.00	\$0.00	\$15,000.00	\$0.00
2	11/11/25	Demo and site clearing labor	Labor for all demo and site prep work.	\$40,000.00	\$0.00	\$40,000.00	\$0.00
Foundation & Concrete				\$62,000.00	\$0.00	\$0.00	\$62,000.00
Framing and concrete for entire house							
Electrical rough-in				\$46,000.00	\$0.00	\$11,500.00	\$34,500.00
Electrical for the first and second floor							
8	01/01/26	Electrical materials	Custom materials required for this remodel.	\$6,000.00	\$0.00	\$1,500.00	\$4,500.00
9	01/01/26	Electrical sub-contractor work	Sub-contractor consultation and planning and execution	\$40,000.00	\$0.00	\$10,000.00	\$30,000.00
Plumbing				\$25,000.00	\$0.00	\$0.00	\$25,000.00
Sub-contractor plumbing work							
Misc. line items				\$58,000.00	\$0.00	\$0.00	\$58,000.00
Invoice total						\$66,500.00	

Cancel Save Review and send

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.

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.

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

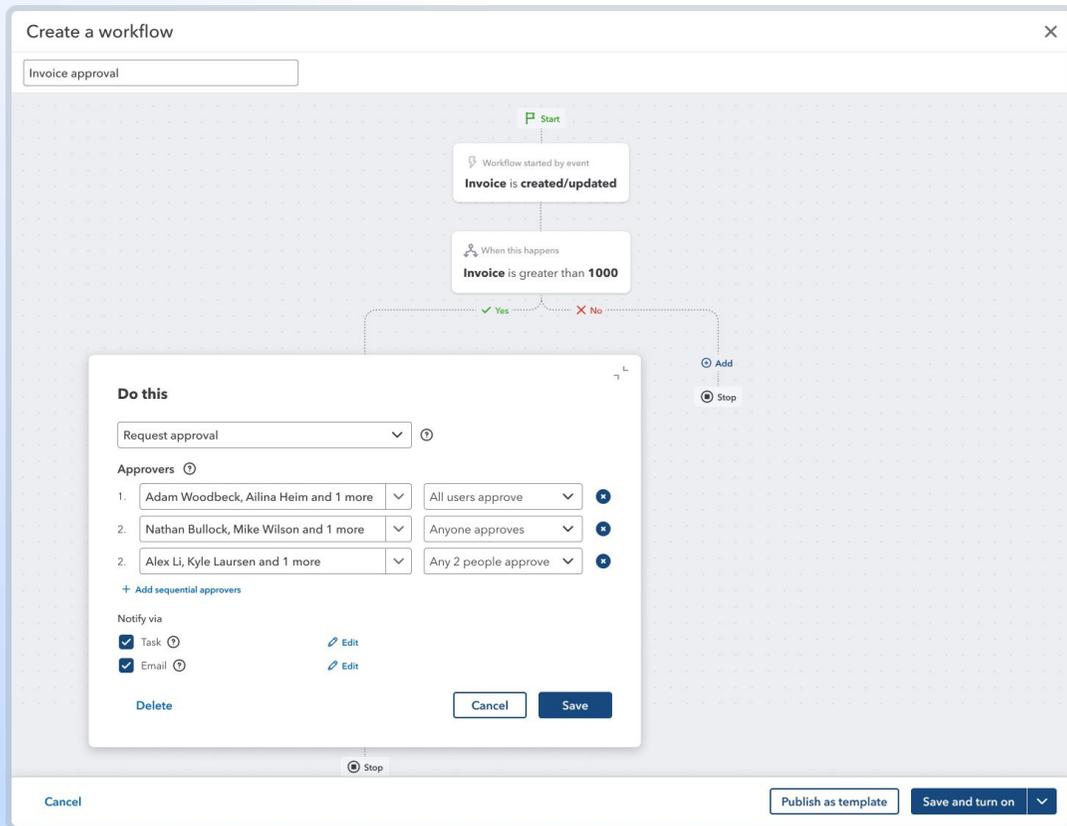


Dimensions on workflow automation



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.

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

The screenshot displays the Intuit Enterprise Suite interface for a 'Profit and Loss' report. The report is for 'Keystone Construction (Par)' covering the period from 01/01/2026 to 02/18/2026. The report is set to 'Accrual' accounting and shows a 'Gross Profit Margin' of 98.89%. A 'Gross Profit Margin' calculated field is highlighted in blue. To the right, the 'Edit calculated fields' dialog is open, showing the formula: $\text{Gross Profit} / \text{Total for Income} * 100$. The dialog also shows the field name 'Gross Profit Margin' and type '%'. A 'Valid input' message states: 'Only data already in this report can be added. Report totals are calculated separately and won't use this formula.'

Account	Total
Income	
4000 Sales	21,497.98
Total for Income	\$21,497.98
Cost of Goods Sold	
5010 Cost of Goods Sold	237.81
Total for Cost of Goods Sold	\$237.81
Gross Profit	\$21,260.17
Gross Profit Margin	98.89 %
Expenses	
6000 Consultancy	-356.67
6001 Advertising & Marketing	-2,346.47
Listing fees	60,205.00
Social media	71,000.00
Total for 6001 Advertising & Marketing	\$128,858.53
Total for 6000 Consultancy	\$128,501.86
6010 Bank Charges & Fees	
6012 PayPal Fees	200.00
Total for 6010 Bank Charges & Fees	\$200.00

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.



Intuit Intelligence

Ruta Bhat

Staff Customer Experience Professional

Team: GBSG Customer Experience
Location: Plano, TX



Polling question

Do you currently use conversational AI?

1

Never

2

Rarely

3

Sometimes

4

Always

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.

Fast facts

Who

Admin users with a QBO
subscription

When

Live as of Feb 2026

How

QBO > Navigation menu 

Where

US

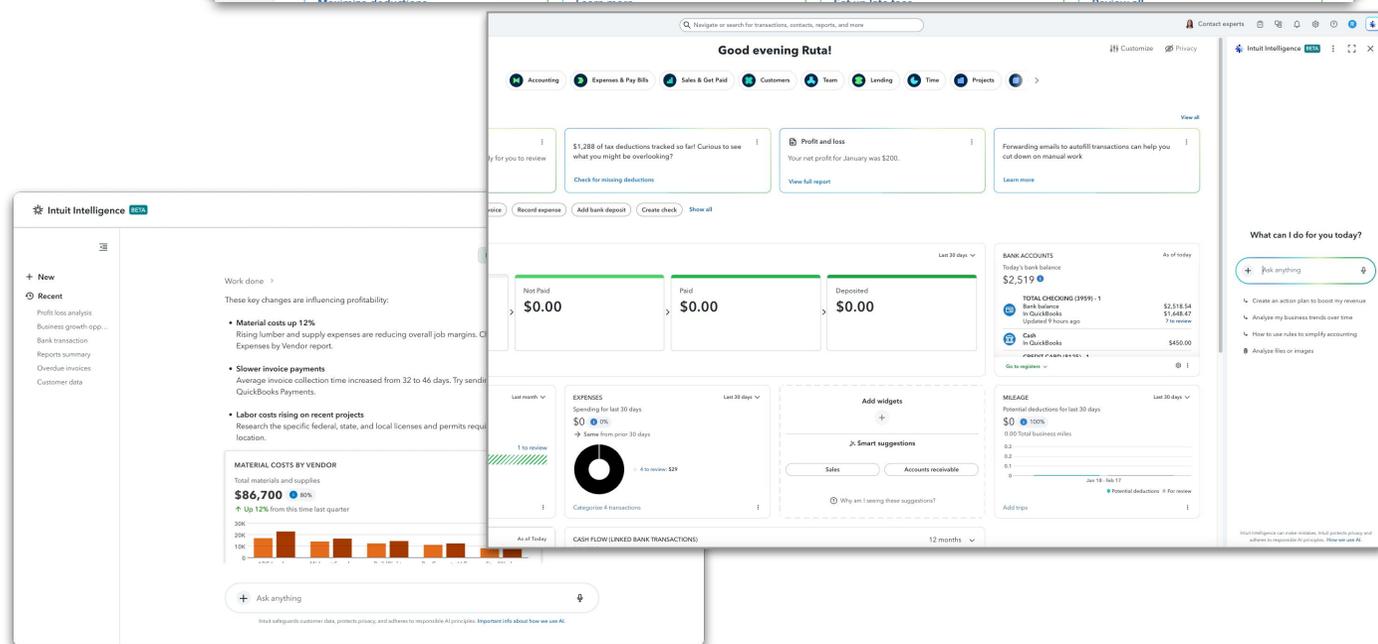
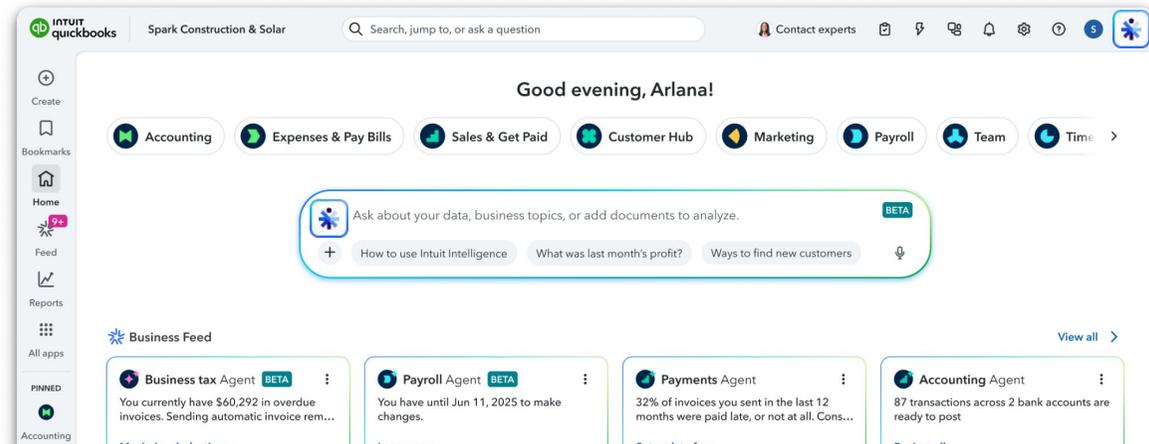
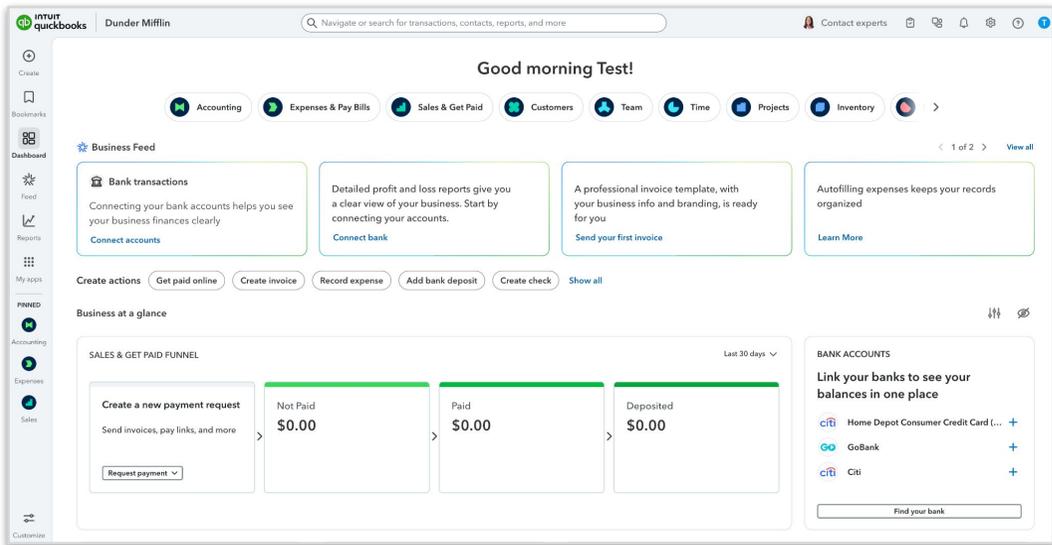
Intuit Intelligence: How can I access this feature?

From > To State - Visuals

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.

FROM



Intuit Intelligence Demo

Save 90% for 3 months with one-on-one expert help. Cancel anytime. Terms apply. [Start saving today](#)

INTUIT quickbooks Luna Dog Treats Contact experts

Good evening Ruta! Customize Privacy

Accounting Expenses & Pay Bills Sales & Get Paid Customers Team Lending Time Projects

Business Feed View all

- Overdue invoices**: \$3,043 worth of invoice reminders are ready for you to review and send. [Review all](#)
- \$1,288 of tax deductions tracked so far!**: Curious to see what you might be overlooking? [Check for missing deductions](#)
- Profit and loss**: Your net profit for January was \$200. [View full report](#)
- Forwarding emails to autofill transactions can help you cut down on manual work**. [Learn more](#)

Create actions [Get paid online](#) [Create invoice](#) [Record expense](#) [Add bank deposit](#) [Create check](#) [Show all](#)

Business at a glance

SALES & GET PAID FUNNEL Last 30 days

Create a new payment request
Start getting paid faster
Activate QuickBooks Payments
[Request payment](#)

Not Paid: \$0.00 | Paid: \$0.00 | Deposited: \$0.00

BANK ACCOUNTS As of today

Today's bank balance: \$2,519

TOTAL CHECKING (3959) - 1	\$2,518.54
Bank balance	\$1,648.47
In QuickBooks	Updated 10 hours ago
	7 to review
Cash In QuickBooks	\$450.00

[Go to registers](#)

PROFIT & LOSS Last month

Net profit for January: \$200 (40%)
Up 100% from prior month

Income: \$200 (1 to review)
Expenses: \$0 (2 to review)

[Categorize 3 transactions](#)

EXPENSES Last 30 days

Spending for last 30 days: \$0 (0%)
Same from prior 30 days

4 to review: \$29

[Categorize 4 transactions](#)

Add widgets

Smart suggestions: Sales, Accounts receivable

Why am I seeing these suggestions?

MILEAGE Last 30 days

Potential deductions for last 30 days: \$0 (100%)
0.00 Total business miles

Jan 18 - Feb 17

[Add trips](#)

DEPOSIT TRACKER As of Today

Track all your QuickBooks Payments deposits here: \$0

From QuickBooks Payments only

[View deposits](#)

CASH FLOW (LINKED BANK TRANSACTIONS) 12 months

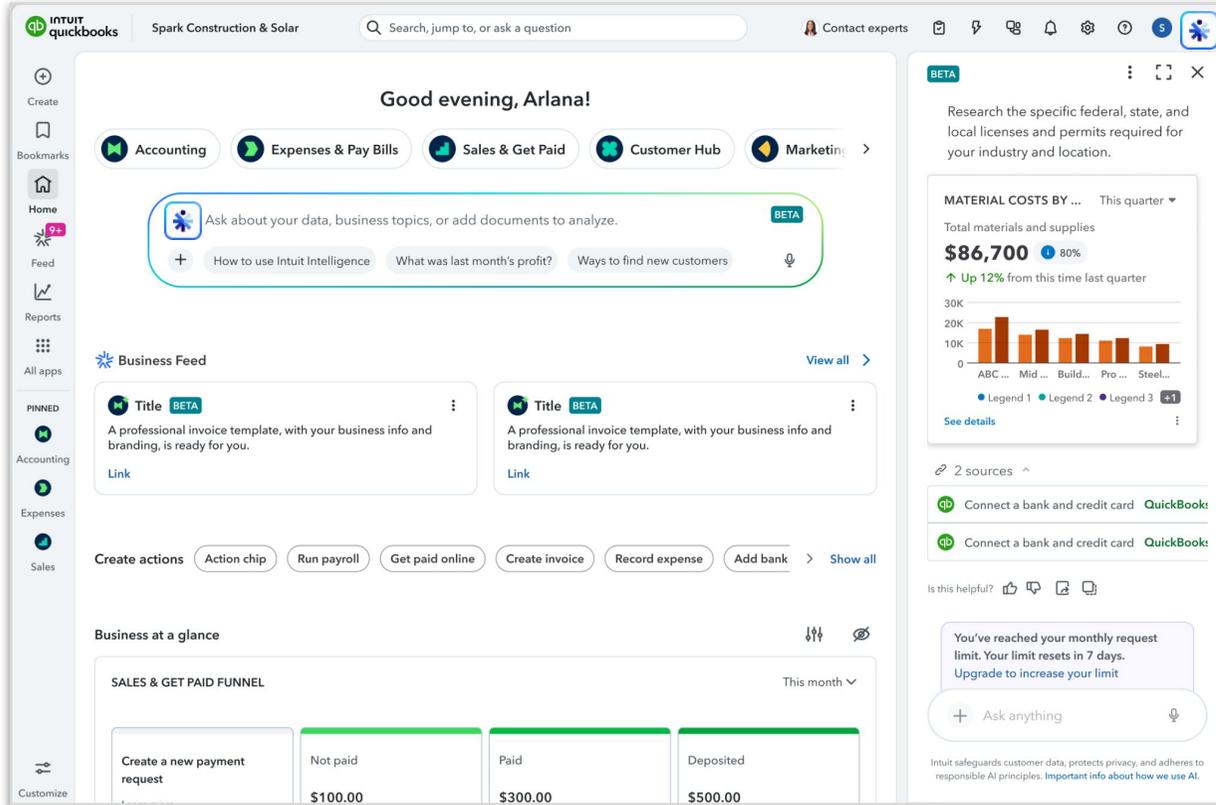
Today's cash balance: \$2,519

Cash balance Money in/out

[View cash flow](#)

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:

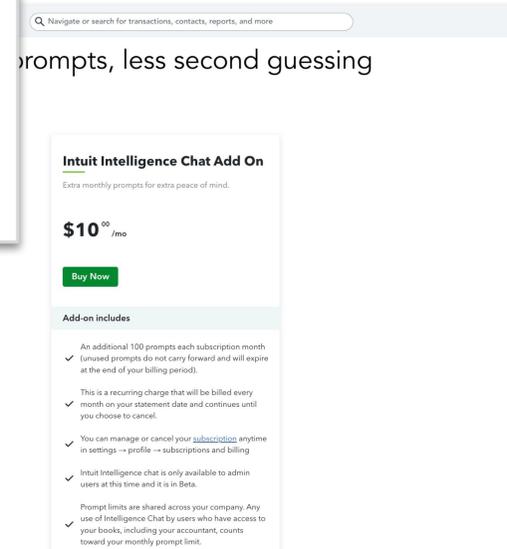
- **In QuickBooks** - Select **Add more prompts** when the message appears after you reach your monthly limit.
- **Online purchase page:** Visit the [Intuit Intelligence Chat Add-on](#) page.

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

Cancel your prompt subscription

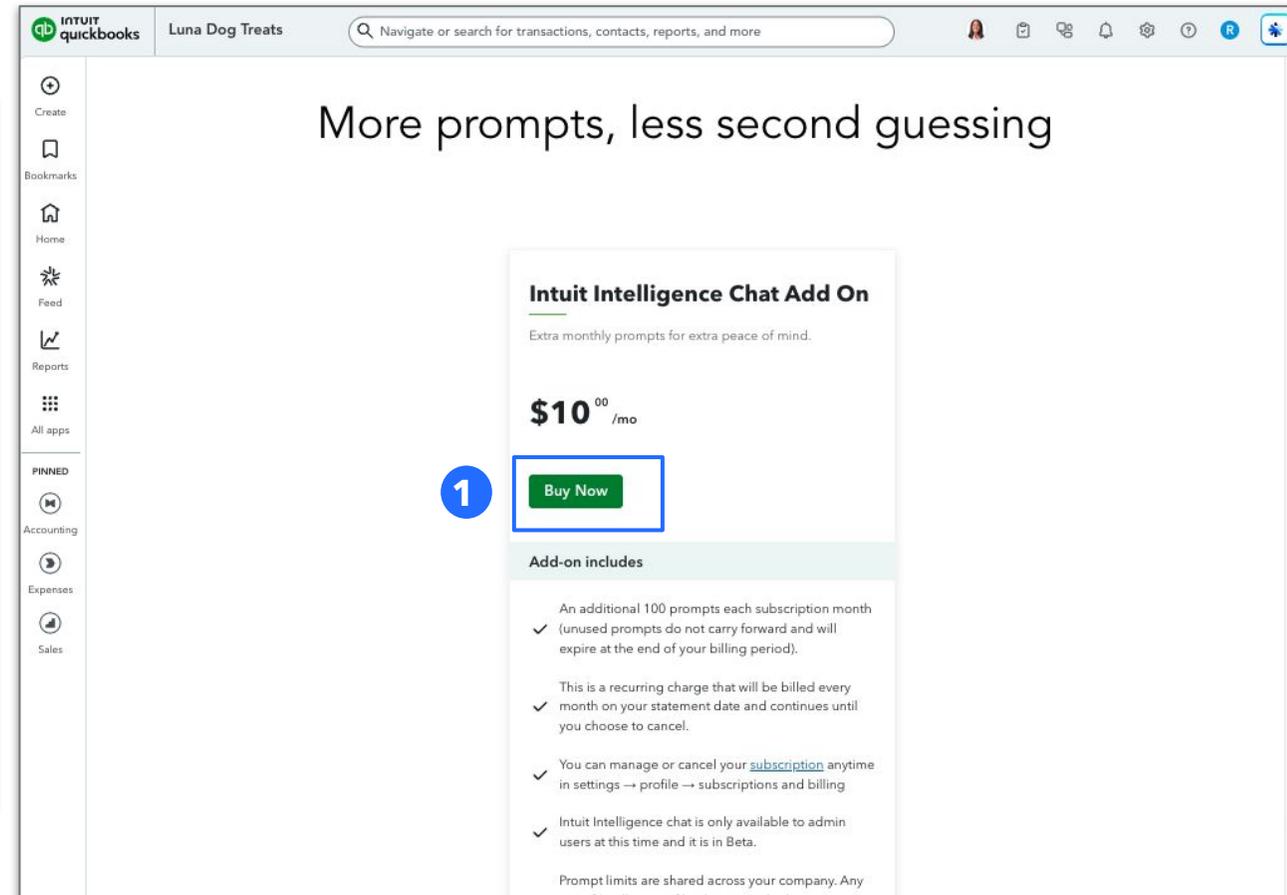
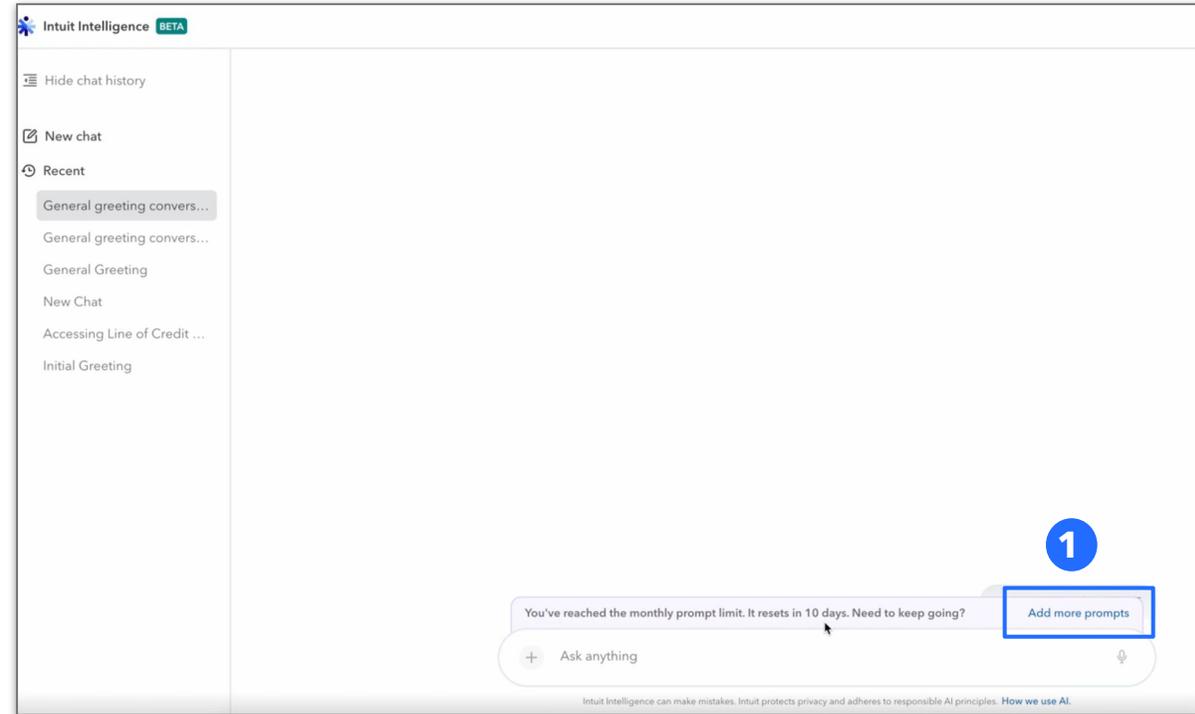
1. Go to **Settings**, then **Subscriptions and billing**.
2. Select **Cancel** and follow the steps to cancel your subscription.

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



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)



Intuit Intelligence: How can I purchase more prompts?

Visit the [Intuit Intelligence Chat Add-on](#) page >> Buy Now >> Choose Address and Save

Subscribe

Update Company Profile

1 Please update your company information to continue

First name: Last name:

Business name:

Address:

Street address (optional):

City:

State: ▼

ZIP code:

Company phone number:

2

[Cancel](#)

Intuit Intelligence: How can I purchase more prompts?

Visit the [Intuit Intelligence Chat Add-on](#) page >> Buy Now >> Choose Address and Save >> Subscribe

Subscribe

Credit/Debit card Bank Transfer PayPal

Card number
***** 0382

Expiration CVV
04 2028

Name on card
Ruta Sanjay Bhat

Billing address
Country
United States
Address
8701 Thrush Trl
Street address (optional)
City
McKinney
State
Texas
ZIP code
75071
 Use my existing company address

Company address
Country
United States
Address
2600 Marine Way
Street address (optional)
City
Mountain View
State
California
ZIP code
94043-1126

I give my permission to Intuit to store the payment method

By selecting **Subscribe**, I agree to the [Terms of Service](#) and authorize Intuit to charge my card on 03/06/2026 and monthly thereafter at the then-current price, plus applicable fees and tax, unless I cancel. I can cancel anytime by going to the Account and Settings page. Intuit's Global Privacy Statement will apply to any personal information you provide us.

3

Subscription summary

Intuit Intelligence Chat **\$10**/mo
+ applicable taxes

What you'll pay today
You'll pay a prorated amount of **\$5.71** (including applicable taxes and fees) today to cover the rest of this billing period. Your next monthly billing date is 03/06/2026.

Intuit Intelligence: How can I purchase more prompts?

Visit the [Intuit Intelligence Chat Add-on](#) page >> Buy Now >> Choose Address and Save >> Subscribe

Subscribe

Credit/Debit card Bank Transfer PayPal

Mastercard *0382

Expiration 04 2028 Cvv

Name on card
Ruta Sarjaj Bhat

Billing address

Country
United States

Address
8701 Thrush Trl

Street address (optional)

City
McKinney

State
Texas

ZIP code
75071-3929

Use my existing company address

Company address

Country
United States

Address
2600 Marine Way

Street address (optional)

City
Mountain View

State
California

ZIP code
94043-1126

I give my permission to Intuit to store the payment method.

By selecting Subscribe, I agree to the [Terms of Service](#) and authorize Intuit to charge my card on 03/06/2026 and monthly thereafter at the then-current price, plus applicable fees and tax, unless I cancel. I can cancel anytime by going to the [Account and Settings](#) page. Intuit's [Global Privacy Statement](#) will apply to any personal information you provide us.

Subscribe

Subscription summary

Intuit Intelligence Chat **\$10/mo**
= applicable taxes

What you'll pay today
You'll pay a prorated amount of **\$5.71** (including applicable taxes and fees) today to cover the rest of this billing period. Your next monthly billing date is 03/06/2026.



Subscribed

Don't forget to write this off as a business expense

What happens next?

- We'll email a confirmation to Ruta Bhat at ruta_bhat@intuit.com
- To get more information or manage your plans, go to the [Billing & subscription](#) page

[Get started](#)

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

The screenshot shows the Intuit QuickBooks interface for a user named 'Luna Dog Treats'. The top navigation bar includes the QuickBooks logo, the company name, and a search bar. A left sidebar contains navigation icons for 'Create', 'Bookmarks', 'Home', 'Feed', 'Reports', 'All apps', 'Accounting', 'Expenses', and 'Sales'. The main content area displays subscription information for 'Intuit Intelligence Chat', which is highlighted with a blue box. The subscription is 'SUBSCRIBED' with a next charge on 03/06/2026, priced at \$10/mo plus applicable taxes. Other visible subscriptions include 'QuickBooks Plus' (Free Subscription) and 'QuickBooks Online Payments' (SUBSCRIBED).

Company ID 9341 4551 3886 0369

Payment method Mastercard *0382 Expires 04/2028

Payment history [View payment history](#)

▼ **Billed to you** 4

- QuickBooks Plus**
Free Subscription
[Downgrade your plan](#)
[Cancel](#)
[Upgrade your plan](#)
- Intuit Intelligence Chat**
SUBSCRIBED Next charge on 03/06/2026
\$10/mo
+ applicable taxes
[Cancel subscription](#)
- QuickBooks Online Payments**
MERCHANT ID: 5247718090962708
SUBSCRIBED
[Manage merchant account](#)
[Cancel subscription](#)

[Connect an existing QuickBooks Online Payments account](#)

Better bank feed experiences

Eric Foster

Staff Product Manager

Team: Core Accounting
Location: Mountain View, CA



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

Fast facts

Who

Everyone using the new bank feed

When

Live as of Feb 2026

How

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

Where

All regions and all QBO plans

Payee warnings

The screenshot shows the Intuit QuickBooks interface for 'Eric's Ice Cream'. The main section is 'Bank transactions' for the 'Checking' account. It displays several bank account cards: 'Other checking acco...' with a balance of \$944.63, 'Amazon Credit' with \$0.00, 'Savings (3456)' with \$0.00, 'Checking' with a balance of \$58.97 and a warning icon, and 'Checking (all-in)' with a balance of -\$6,324.40. Below these cards are tabs for 'Pending (213)', 'Posted', and 'Excluded'. A warning message states: 'Something's not quite right. Please click on the rows below to see transaction specific errors.' Below the warning is a search bar and a table of transactions. The table has columns for Date, Bank Description, Spent, Received, From/To, Match/Categorize, and Action. The first three rows are visible:

Date	Bank Description	Spent	Received	From/To	Match/Categorize	Action
03/12/2025	Dollar General	\$10.00		Select vendor	Expense - 01/28/2025 -\$10.00	Match Categorize Match
01/30/2025	Ace Hardware	\$59.99		Select vendor	Job Supplies	Match Categorize Post
01/30/2025	Shell	\$79.99		Select vendor	Advertising & Marketing	Match Categorize Post

Learn more on [Canny](#)

Account search

The screenshot displays the Intuit QuickBooks interface for a user named Eric's Ice Cream. The left sidebar contains navigation options such as MY APPS, Accounting, Bank transactions, Integration transactions, Receipts, Reconcile, Rules, Chart of accounts, Recurring transactions, Revenue recognition, Fixed assets, My accountant, Live Experts, Expenses & Bills, Sales & Get Paid, Customer Hub, Payroll, Team, Projects, and Inventory. The main content area is titled "Bank transactions" and features a "Bookkeepers you can trust" banner. Below this, a red-bordered error message states: "Unable to get transactions for 5 accounts". The error details include: "Cash on hand - Error 324 - Can't find this account. Fix Now. or disconnect. Both options keep the transactions you already have in QuickBooks.", "Checking - Error 324 - Can't find this account. Fix Now. or disconnect. Both options keep the transactions you already have in QuickBooks.", "Savings - Error 103 - Username/password not working. Fix Now. or disconnect. Both options keep the transactions you already have in QuickBooks.", "Check Image - Error 324 - Can't find this account. Fix Now. or disconnect. Both options keep the transactions you already have in QuickBooks.", and "1 more error". Below the error message, there are buttons for "Give feedback", "Update", "Requests (5)", and "Link account". The account search results show four accounts: "Checking (1234) Bank: -\$33,936.65", "Credit Card Bank: \$273.91", "Savings Bank: -\$25.00", and "Bank account with c... Bank: \$24,714.04". The "Credit Card" account is highlighted with a green border. Below the account cards, there are filters for "Pending (14)", "Posted", and "Excluded", along with links for "Switch to previous version", "Tutorial", and "Go to bank register". At the bottom, there is a search bar and a table header with columns: Date, Bank Description, Spent, Received, From/To, Match/Categorize, and Action.

Learn more on [Canny](#)

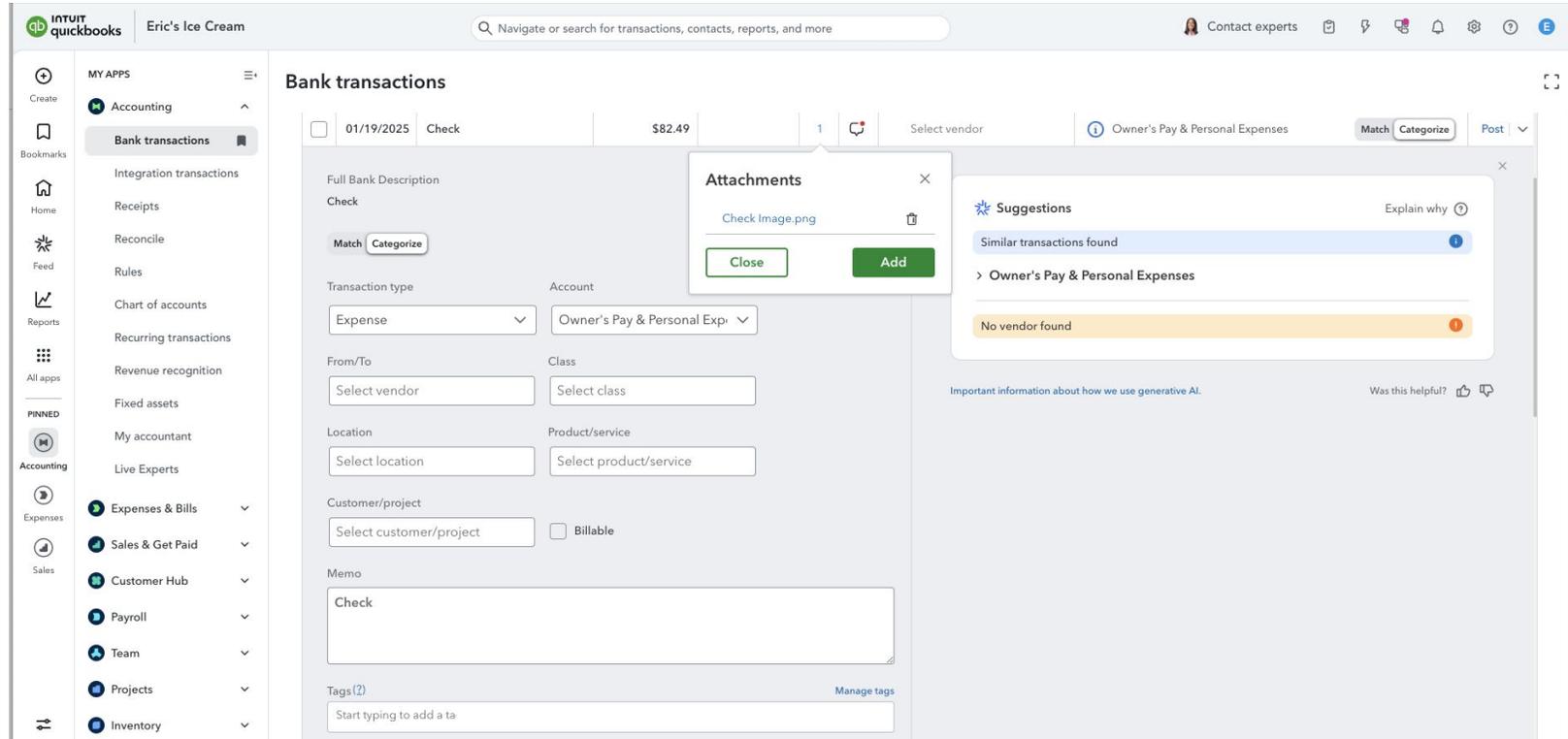
Drag and drop attachments

The screenshot displays the Intuit QuickBooks interface for a user named Eric's Ice Cream. The main view is titled "Bank transactions" and shows a list of transactions. The interface includes a sidebar with navigation options, a top navigation bar, and a main content area with a table of transactions.

Date	Check No.	Bank Description	Spent	Received	From/To	Match/Categorize	Action
11/02/2024	-	Apple		\$714.00	David	Sales receipt 1049 - 11/02/2024 David \$714.00	Match Categorize Match
09/18/2024	-	Best Buy Just		\$649.12	Select cust	Billable Expense Income	Match Categorize Post
10/02/2024	-	Nordstrom Just Another		\$645.67	Select cust	Sales	Match Categorize Post
09/27/2024	-	Starbucks Just Another		\$623.26	Select cust	Meals & Entertainment	Match Categorize Post
10/21/2024	-	Starbucks Personal		\$621.55	Starbucks	RULE Meals & Entertain	Match Categorize Post
09/19/2024	-	Kfc Just Another		\$612.02	Select cust	Meals & Entertainment	Match Categorize Post
10/28/2024	-	Nordstrom Business		\$543.89	Select cust	Owner's Pay & Personal Expense	Match Categorize Post
09/03/2024	-	Starbucks Random		\$533.11	Starbucks	RULE Meals & Entertain	Match Categorize Post
11/03/2024	-	Jabra		\$521.00	Select cust	RULE Office Supplies &	Match Categorize Post
10/05/2024	-	Starbucks Personal		\$492.75	Starbucks	RULE Meals & Entertain	Match Categorize Post
10/20/2024	-	Best Buy Business		\$489.23	Select cust	Office Si Downloads are	Match Categorize Post

Learn more on [Canny](#)

Check image matching



Learn more on [Canny](#)

Reorder columns

The screenshot shows the 'Bank transactions' page in QuickBooks. The table has the following columns: Date, Bank Description, Amount, From/To, Match/Categorize, and Action. The 'Match/Categorize' column is currently highlighted, and a mouse cursor is hovering over it, suggesting a drag-and-drop action to reorder the columns.

Date	Bank Description	Amount	From/To	Match/Categorize	Action
03/12/2025	Dollar General	-\$10.00	Select vendor	Expense - 01/28/2025 -\$10.00	Match Categorize Match
01/29/2025	Dollar General	-\$9.88	Select	RULE Office Supplies & Software	Match Categorize Post
01/27/2025	Lowe's	-\$12.88	Select	Job Supplies	Match Categorize Post
01/27/2025	Ace Hardware	-\$55.65	Select vendor	Job Supplies	Match Categorize Post
01/25/2025	Starbucks	-\$75.59	Select vendor	Meals & Entertainment	Match Categorize Post
01/24/2025	Harbor Freight Tools	-\$70.65	Select vendor	Job Supplies	Match Categorize Post
01/19/2025	Check	-\$82.49	Select vendor	Owner's Pay & Personal Expenses	Match Categorize Post
01/18/2025	Deposit	\$96.10	Select custom	Owner's Pay & Personal Expenses	Match Categorize Post
01/16/2025	Circle K	\$52.38	Select custom	Sales	Match Categorize Post
01/07/2025	Dollar General	-\$42.96	Select vendor	RULE Office Supplies & Software	Match Categorize Post
01/04/2025	Best Buy	-\$12.06	Best Bi	Office Supplies & Software	Match Categorize Post
01/02/2025	Dollar General	-\$78.89	Select vendor	RULE Office Supplies & Software	Match Categorize Post
12/21/2024	Harbor Freight	\$78.97	Select custom	Job Supplies	Match Categorize Post
12/15/2024	Harbor Freight Tools	\$75.84	Select vendor	Job Supplies	Match Categorize Post

Learn more on [Canny](#)

Performance improvements



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.

Business Tax AI

Tricia DelGaudio Principal Marketing Manager

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



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.

Fast facts

Who

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

When

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

How

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

Where

US

How to access Deduction Maximizer

The screenshot displays the Intuit QuickBooks dashboard for a user named Matthew. The interface includes a top navigation bar with the company name 'Income Tax Company', a search bar, and user profile information. Below the navigation bar, there are several tabs for different business areas: Accounting, Expenses & Pay Bills, Sales & Get Paid, Customers, Team, Time, Projects, and Inventory. The main content area is titled 'Business Feed' and contains three cards: 'Overdue invoices' (with a \$200 worth of reminders), '\$2,176 of tax deductions tracked so far!' (with a 'Check for missing deductions' link), and 'Forwarding emails to autofill transactions can help you cut down on manual work' (with a 'Learn more' link). A central navigation bar offers options like 'Go online', 'Create invoice', 'Record expense', 'Add bank deposit', 'Create check', and 'Show all'. The dashboard is divided into several sections: 'BANK ACCOUNTS' showing a balance of \$1,913; 'EXPENSES' showing \$0 spent for the last 30 days; 'INVOICES' showing \$200 unpaid and \$0 paid; and 'MILEAGE' showing \$15 in potential deductions for 20.00 total business miles. A left sidebar contains navigation icons for 'Create', 'Bookmarks', 'Home', 'Feed', 'Reports', 'All apps', 'PINNED', 'Accounting', 'Expenses', 'Sales', and 'Business Tax'. The 'Business Tax' menu is expanded, showing options like 'Overview', 'Tax summary', and 'Year-end filing'. At the bottom left, there is a 'Missing data? Check account connections' message.

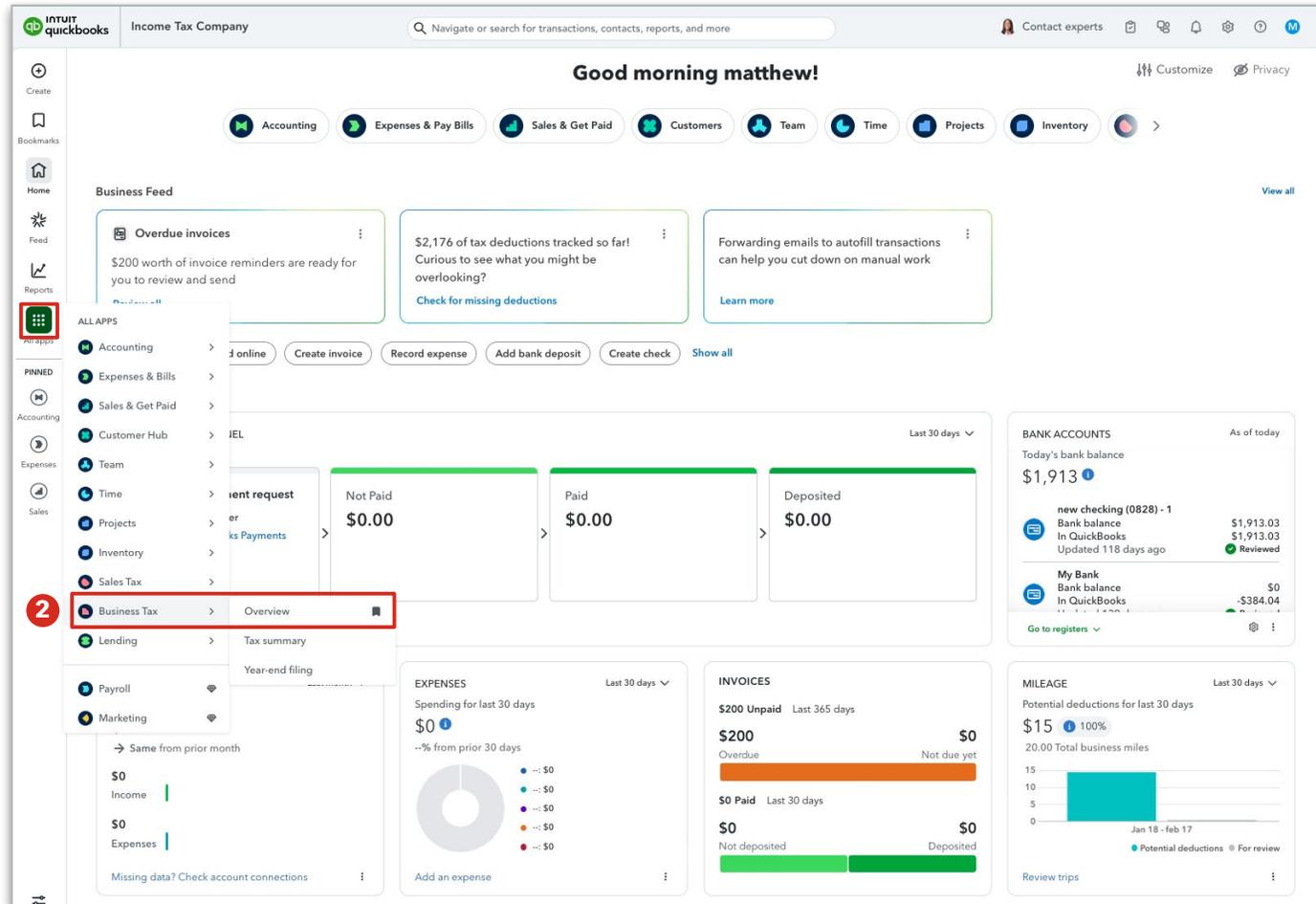
How to access Deduction Maximizer

> Business Feed

The screenshot displays the Intuit QuickBooks Business Feed interface for 'Income Tax Company'. The top navigation bar includes 'Accounting', 'Expenses & Pay Bills', 'Sales & Get Paid', 'Customers', 'Team', 'Time', 'Projects', and 'Inventory'. A red circle with the number '1' highlights the 'Business Feed' link in the left sidebar. The main feed area contains several notifications, with a red box highlighting a notification titled '\$2,176 of tax deductions tracked so far! Curious to see what you might be overlooking?'. Below this notification is a button labeled 'Check for missing deductions'. Other notifications include 'Overdue invoices' and 'Forwarding emails to autofill transactions can help you cut down on manual work'. The interface also features a 'Good morning matthew!' greeting, a search bar, and various dashboard widgets such as 'BANK ACCOUNTS', 'EXPENSES', 'INVOICES', and 'MILEAGE'.

How to access Deduction Maximizer

> All Apps > Business Tax > Overview



How to access Deduction Maximizer Summary

The screenshot displays the Intuit QuickBooks interface for 'Income Tax Company'. At the top, there is a search bar and a greeting: 'Good morning matthew!'. Below the greeting are navigation tabs for Accounting, Expenses & Pay Bills, Sales & Get Paid, Customers, Team, Time, Projects, and Inventory. A red circle with the number '1' highlights the 'Business Feed' tab in the left sidebar. In the main content area, a notification box states: '\$2,176 of tax deductions tracked so far! Curious to see what you might be overlooking? Check for missing deductions'. A red circle with the number '2' highlights the 'Business Tax' section in the left sidebar. The 'Business Tax' section is expanded, showing an 'Overview' tab. Below this, there are several summary cards: 'EXPENSES' showing \$0 spent for the last 30 days, 'INVOICES' showing \$200 Unpaid and \$0 Paid, and 'MILEAGE' showing \$15 in potential deductions for 20.00 total business miles. The 'BANK ACCOUNTS' section shows a total balance of \$1,913.03.

Business Tax App – Overview

Get Your 2025 Taxes Ready

The screenshot displays the Intuit QuickBooks Business Tax overview dashboard for an "Income Tax Company". The interface includes a left-hand navigation menu with sections for "ALL APPS", "PINNED", and "Accounting". The "All apps" icon is highlighted with a red box. The "Business Tax" app is also highlighted with a red box, and its "Overview" sub-option is selected. The main content area is titled "Business Tax overview" and features a "Business Tax at a glance" section with a "Tax year 2025" dropdown. This section shows a "TAXABLE PROFIT" of \$567, with "Income" at \$2,150 and "Deductions" at \$1,583. A "YOUR FEDERAL TAX DEADLINES" section lists due dates for 2025 annual income taxes (Mar 16), Q1 and Q2 estimated taxes (Apr 15, Jun 15), and the 2025 filing extension (Sep 15). Below this, a "GET YOUR 2025 TAXES READY" section lists tasks: "Review tax mapping for accuracy" (with a "Review" button), "Missing Deductions" (with a "Let's go" button and highlighted by a red box), "File with QuickBooks Live Expert Tax - powered by TurboTax" (with a "Start taxes" button), and "Reconcile bank accounts for accuracy" (with a "Reconcile" button). A "Completed or hidden tasks" link is also visible.

Business Tax AI – Deduction Maximizer

([demo video](#))

Deduction maximizer BETA Give feedback ×

So far you've recorded \$1,583 deductible expenses for tax year 2025. I'll help you look for more to claim.

I've found these expense categories for you that 'Commercial photography' businesses often overlook. Edit industry

- Other business expenses**
\$-11 of deductions in your books
Have you thought about?
 - Photography contest entry fees
 - Continuing education and workshops
 - Professional association membership duesSee full list
- Travel**
\$350 of deductions in your books
Have you thought about?
 - Tips for service providers on location
 - Laundry and dry cleaning on overnight trips
 - Local transportation at your destinationSee full list
- Depreciation**
\$0 of deductions in your books
Have you thought about?
 - Section 179 deduction for camera bodies and lenses
 - Bonus depreciation on computer equipment
 - Depreciation on specialized studio lighting kitsSee full list
- Legal & professional services**
\$300 of deductions in your books
Have you thought about?
 - Payments to freelance photo retouchers
 - Fees paid to stylists or makeup artists
 - Location scouting service feesSee full list
- Meals (50% deductible)**
\$2 of deductions in your books
Have you thought about?
 - Meals with assistants or crew during a shoot
 - Coffee and snacks during a client meeting
 - Meals while attending a photography workshopSee full list
- Advertising**
\$722 of deductions in your books
Have you thought about?
 - Portfolio printing and book creation costs
 - Client appreciation gifts
 - Showcase or gallery exhibition feesSee full list

Done



User groups in Intuit Accountant Suite

Chandrakant Nimoria Staff Product Manager

Team: Small Business Group
Location: Mountain View, CA



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

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**

Fast facts

Who

Any accounting firm using
Intuit Accountant Suite Accelerate

When

Open beta starting in early March!

How

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

Where

US, Canada, UK and Australia

Team / User groups

My menu

User groups

Create new user group

Create

Bookmarks

Home

Reports

All apps

PINNED

Work

Insights

Clients

More

Customize

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 v
NY Group	1	6	View v
SF Group	2	2	View v

1 - 3 of 3 items < Page 1 of 1 >



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

What's around the corner?

On the books schedule

Be sure to check out these recent episodes:

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

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



Join us February 24 for Intuit Connect ON

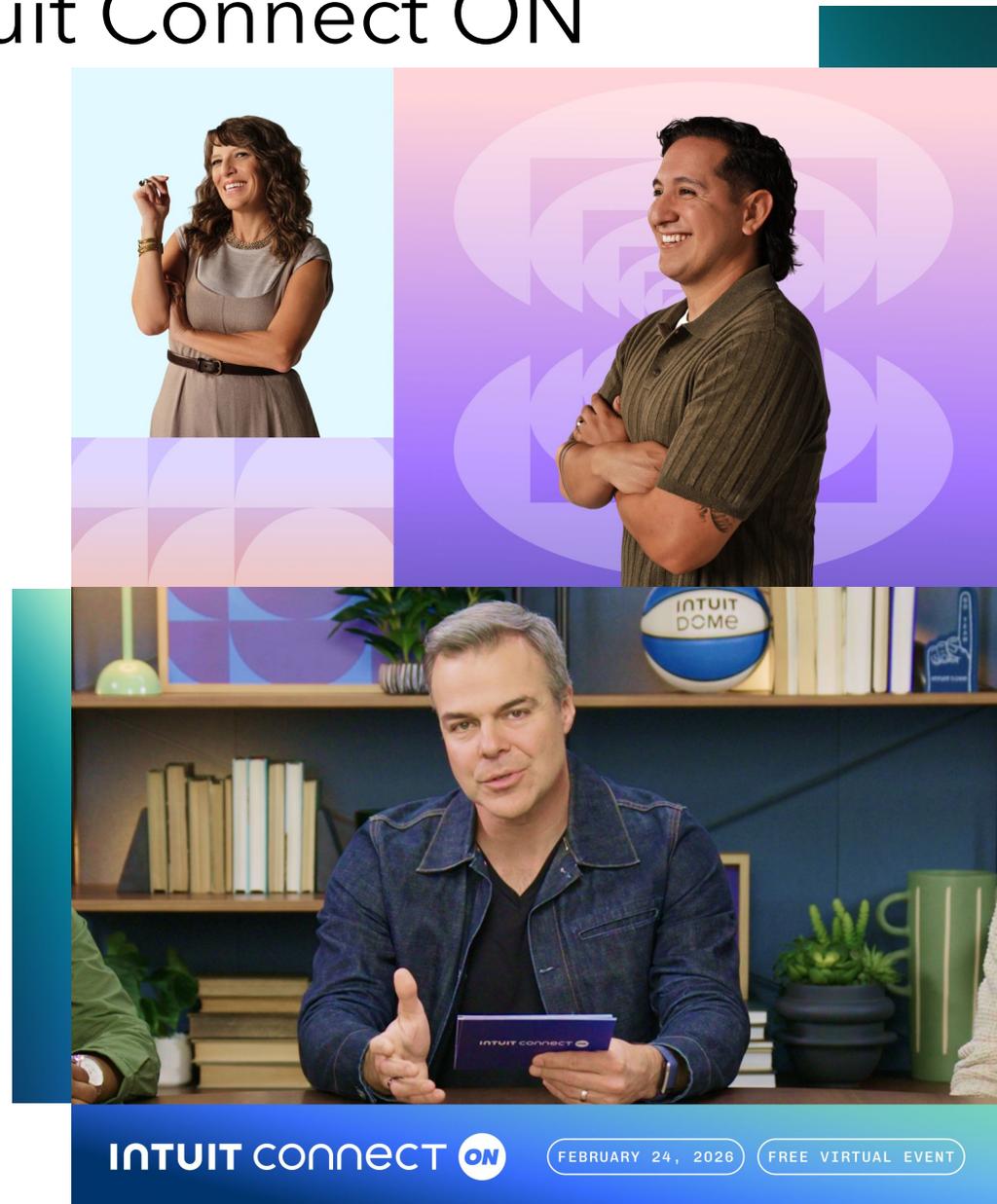
Register now to discover the latest product updates designed to scale, improve collaboration, and support more strategic client advisory across Intuit Intelligence, Intuit QuickBooks, Intuit Accountant Suite, and Intuit Enterprise Suite. You'll have the opportunity to earn a CPE credit, hear from Intuit 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



The graphic features three speakers: a woman in a grey dress on the top left, a man in a brown shirt on the top right, and a man in a blue denim jacket on the bottom. The background is a mix of light blue, purple, and green geometric patterns. At the bottom, there is a blue banner with the event title and details.

INTUIT connect ON FEBRUARY 24, 2026 FREE VIRTUAL EVENT

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.



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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.

Our next webinar is coming up in March

Date:
March 19, 2026

Time:
11am PST / 2pm EST

[Register](#)

INTUIT ProAdvisor
IN THE
KNOW

Thank you