

Transform your work with a more powerful QuickBooks

Automation where it counts. Human where it matters. QuickBooks, powered by the Intuit platform, is improving your experience and helping you manage more of your work in one place. This toolkit answers questions you and your clients may have about the new experience’s features, so you’re prepared to make it all work for you, your firm, and your clients. And, QuickBooks will soon offer Intuit’s AI agents that help you save time and keep your client relationships strong.

Last updated: 1 July 2025

Understand the new connected platform

With QuickBooks, essential business tools work together, so you and your clients can stay on top of everything and be ready for anything. Learn how this new experience can save time and boost productivity for you and your clients.



Find out how to access these improvements

QuickBooks will soon have more powerful features designed to deliver a better experience for everyone. Learn how to opt in and when changes will take place.



Get answers to common questions

We’ve got answers that will help make your experience as productive as possible for you and your clients.



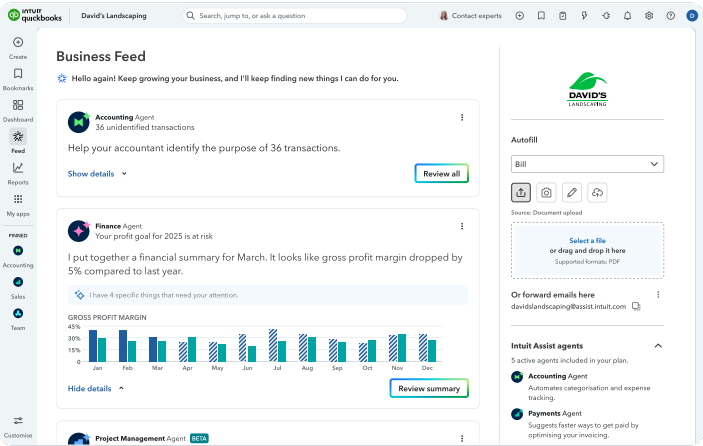
Understand the new connected platform



All your work,
all in one place

QuickBooks will be upgraded with more powerful features, but the fundamentals you know and love are not changing. Get the best of advanced automation and insights to help you save time and keep your client relationships strong—all on a more powerful platform.

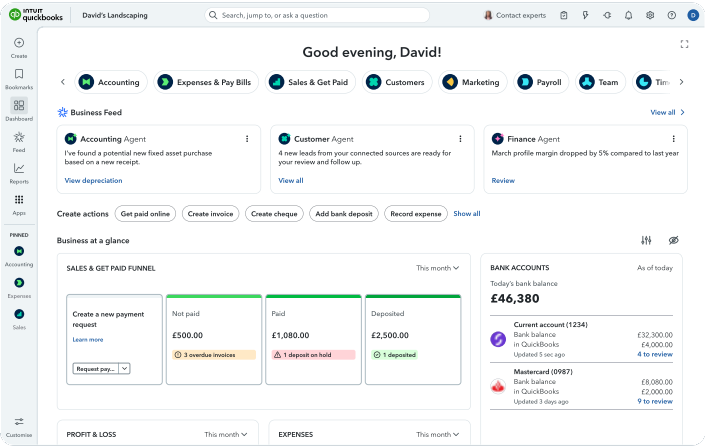
AI agents, Business feed and Customer Hub are coming from November 2025.



COMING SOON

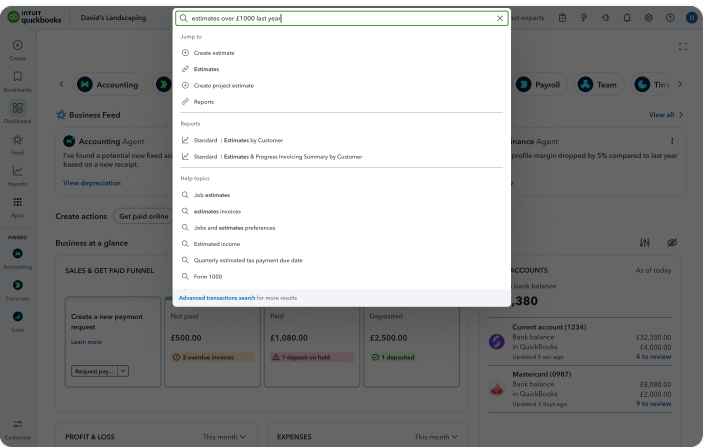
Business feed

See a summary of what tasks AI agents and automation features have helped you complete, so you can review and approve the work quickly—and get back to your clients’ needs.



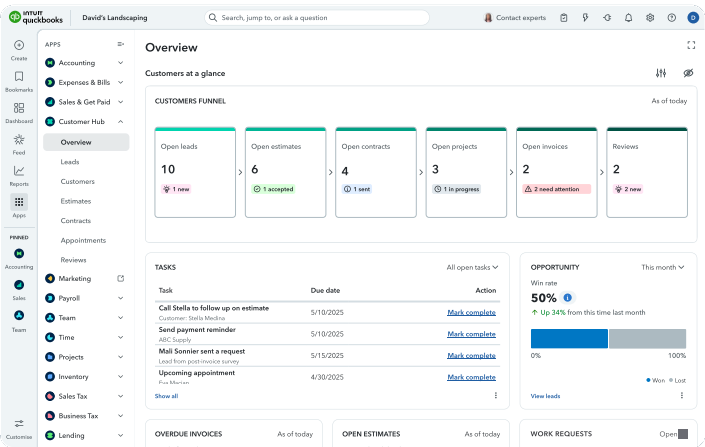
Improved insights and reporting

A customisable performance dashboard comprehensively tracks your clients’ financial health and highlights what needs your attention most. Plus, stay on top of business health with P&L and balance sheet insights.



Smart search

Quickly find transactions, customers, accounts, reports, help, and more with consolidated results from across the platform in the new unified search.



COMING SOON

Customer Hub

Your clients get new CRM functionality to help drive more leads and close more deals. Organise, track, view, and follow up with customers and leads all in one place. Leverage convenient tools to manage everything from capturing referrals to building repeat business.

Navigate the new experience



QuickBooks now has more powerful features to help you get more done—but the fundamentals you know and love are not changing. Use this page to get familiar with the new experience.

1

Create

2

Bookmarks

3

Dashboard

4

Feed

5

Reports

6

Apps

7

PINNED

8

Accounting

9

Expenses

10

Sales

11

Customise

Intuit QuickBooks

David's Landscaping

4

Search, jump to, or ask a question

Contact experts

Good evening, David!

2

3

Accounting

Expenses & Pay Bills

Sales & Get Paid

Customers

Marketing

Payroll

Team

Time

2

3

Business Feed

View all >

Accounting Agent

I've found a potential new fixed asset purchase based on a new receipt.

View depreciation

Customer Agent

4 new leads from your connected sources are ready for your review and follow up.

View all

Finance Agent

March profile margin dropped by 5% compared to last year

Review

Create actions

Get paid online

Create invoice

Create cheque

Add bank deposit

Record expense

Show all

Business at a glance

SALES & GET PAID FUNNEL

This month

Not paid

£500.00

3 overdue invoices

Paid

£1,080.00

1 deposit on hold

Deposited

£2,500.00

1 deposited

Create a new payment request

Learn more

Request pay...

PROFIT & LOSS

This month

EXPENSES

This month

BANK ACCOUNTS

As of today

Today's bank balance

£46,380

Current account (1234)

Bank balance in QuickBooks

£32,300.00

£4,000.00

Updated 5 sec ago

4 to review

Mastercard (0987)

Bank balance in QuickBooks

£8,080.00

£2,000.00

Updated 3 days ago

9 to review

1

Bookmarks

Bookmark your top places and dashboards just like you did in the previous experience.

2

App carousel

Everything you need is accessible here. Easily switch between apps like Accounting, Expenses, Sales Tax, and Payroll.

3

COMING SOON

Business feed

See a summary of work performed by AI agents in one view so you don't have to go find it.

4

Smart search

From customers to transactions and more, find what you need quickly across the entire platform.

We've kept all the features you love

Here's where to find them—and what they're called now

Menu

Features like Accounting and Expenses previously appeared in the menu



Apps


Now, Accounting and Expenses are called apps, and appear in the app switcher

Apps

3rd-party plugins and tools were previously referred to as apps



Integrations

Now, 3rd-party plugins and tools are called integrations, signified by the  icon

Dashboard

There was previously only one dashboard accessible from the main menu



Dashboard plus overviews

Now, the central dashboard has been improved with better customisation. You can also customise new overview pages in some apps

How and when to access these improvements

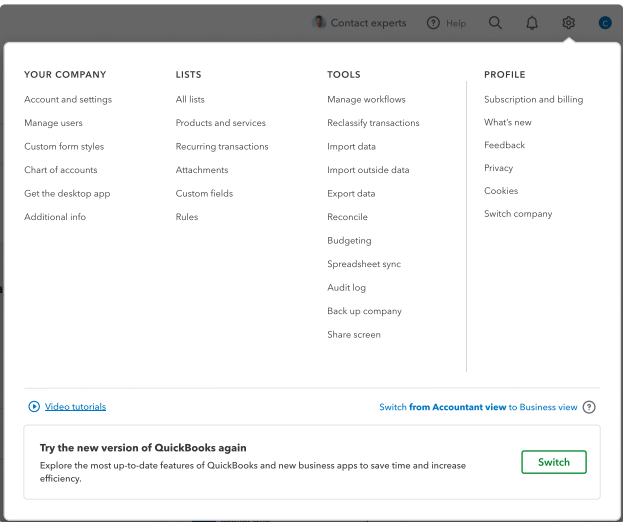


What is early access?

Over the coming weeks, all new and existing QuickBooks Online customers will have the opportunity to opt into this new interface. Early access will be available on Simple Start, Essentials, Plus and Advanced. Ledger and Sole Trader will have access at a later date.

How to opt into early access

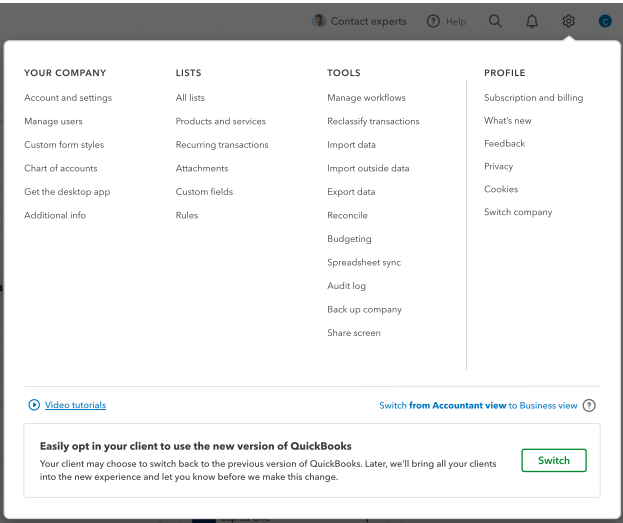
During early access, you or your client can opt in or opt out at any time and revert back to the current QuickBooks Online user interface. To opt a client in or out on their behalf, head to your client's books and click on the settings gear icon on the navigation bar at the top of the screen. You'll see the prompt to switch at the bottom.



If you did not opt into early access but your client did, you will see the new interface when you login to your client's account. A message will appear to let you know of this change and how to manage opt in preferences for that account.

Coming in November: opt in multiple clients at once

In November, you'll easily be able to opt multiple clients into the new experience in just a few quick steps. That means, you'll save time and get clients up and running faster.



What will be changing?

QuickBooks will be upgraded with more powerful features to help you get more done—but the fundamentals you know and love won't change.


What will change

- New streamlined navigation
 - Improved consolidated search
 - Improved business feed
- Customer Hub CRM functionality
- Updated customisable reports
- New full-screen mode for more room to work

What won't change


- Your data. No data is moving, migrating, or changing.
- Manual workflows. You can still perform your jobs in the same way as before, and without automation if you prefer.
- Your pages. All of the pages you're familiar with remain in QuickBooks.
- QuickBooks functionality. All of the same jobs and tasks can be performed as always. No features are being removed.

When is the new experience available?

 August 2025

All users will start to receive early access to the QuickBooks user interface on the Intuit Platform.


You and your clients will have the option to opt into and out of the new platform.

 November 2025

You and your clients will be transitioned to the new platform. You will be notified when this happens.

You can choose to temporarily revert to the previous version of QuickBooks.

QuickBooks AI Agents will be introduced.

 Future

All accounts that opted out or are not currently using the new experience will be moved to the new platform. You'll be notified before this happens.

The previous version of QuickBooks will eventually no longer be available.

Can I still use the previous version of QuickBooks Online?

Yes, accountants may opt out current QuickBooks Online clients from the new experience. While the previous version will remain available for now, it will eventually no longer be supported. All clients will be automatically moved to the new experience at that time. You will be notified before this change happens.

Do I have to upgrade to get access to some of these features?

Every QuickBooks customer, including QuickBooks mobile app users, will get access to some basic AI functionality. Higher-tier plans will get more powerful capabilities and AI agents.

Starting late August, you and your clients can start accessing the new UI experience by manually opting in through your client's QuickBooks Online. Starting in November, all of your clients will have the option to opt in or out to the new UI experience. Plus, you can start experiencing additional capabilities such as Business Feed and AI agents.

Stay up to date with the new QuickBooks

Your clients can keep track of all the changes happening across the more powerful QuickBooks on our website for current customers.

[Visit website](#)