Introduction

AI agents

Multi-entity financial management

Business intelligence

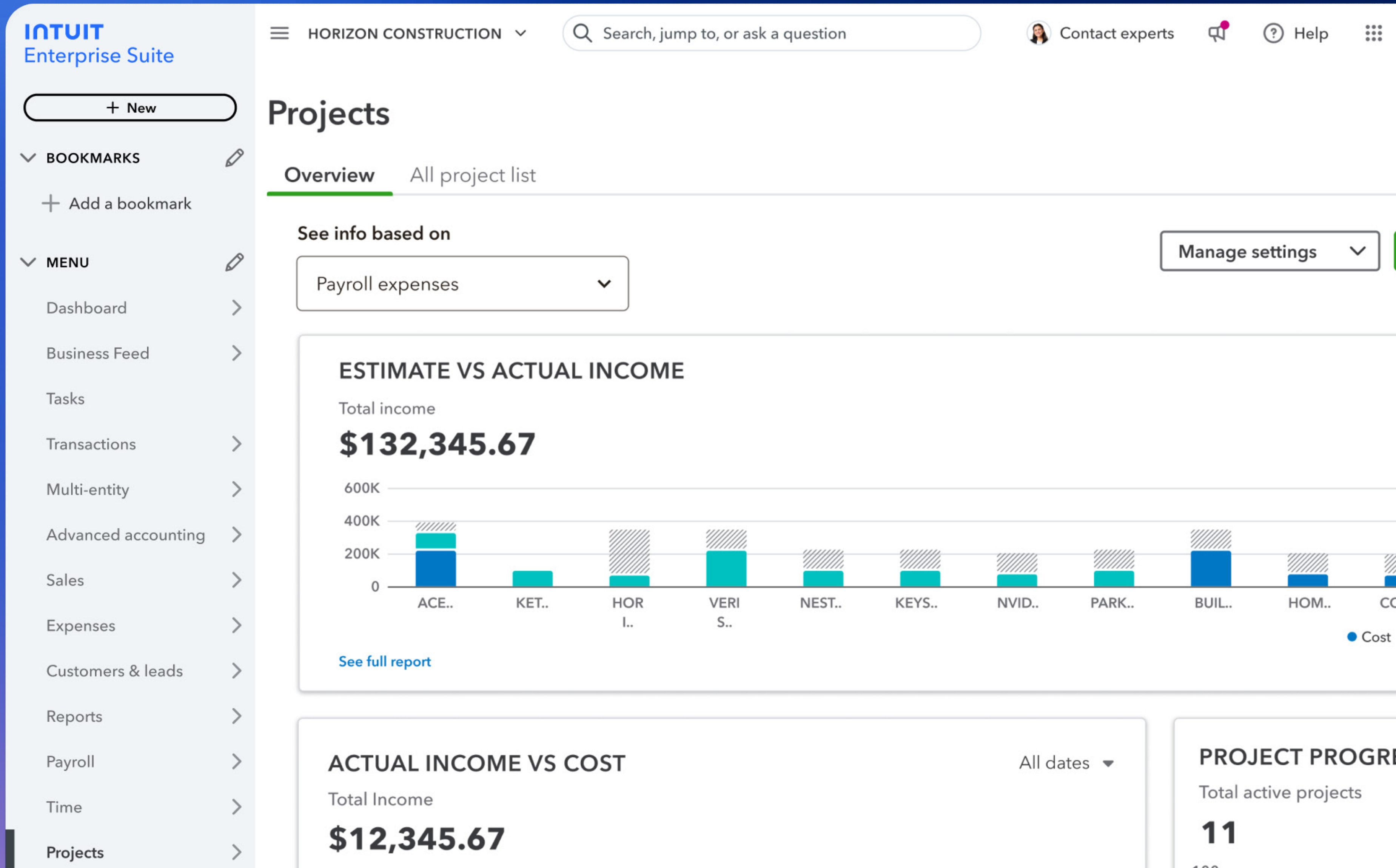
Payroll

Projects

Customer management

Product performance updates

Summer 2025 product release overview



INTUIT
Enterprise Suite

Introduction >
AI agents
Multi-entity financial management
Business intelligence
Payroll
Projects
Customer management
Product performance updates

Introduction

We designed Intuit Enterprise Suite for companies focused on growth, boosting their productivity through powerful automation, and unlocking business intelligence with insights that move them forward. We are committed to continuously improving the platform and adding the capabilities that companies like yours need to scale profitability.

This latest update to Intuit Enterprise Suite will help you and your team work more efficiently, so you can get the insights you need to answer your top strategic questions and make decisions with confidence. You will now have access to Intuit's AI agents, dashboards and reports for enhanced visibility, and other automations to help streamline your day-to-day work, and additional industry customizations that give you better visibility and control.

Introduction

AI agents
Accounting Agent
Payments Agent
Finance Agent
Project Management Agent

Multi-entity financial management

Business intelligence

Payroll

Projects

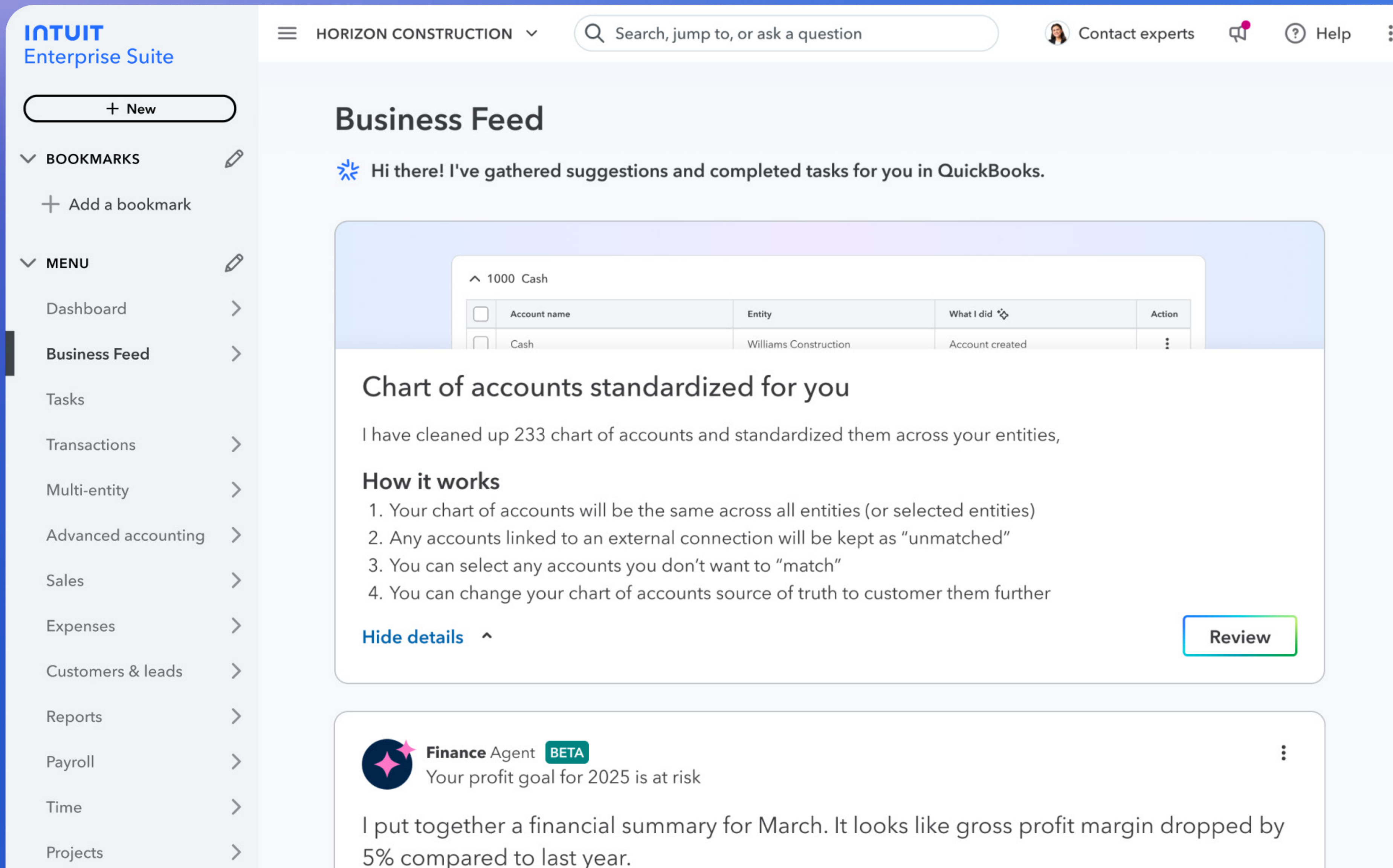
Customer management

Product performance updates

Intuit Assist

AI agents

Features designed to automate tedious manual tasks, so businesses can focus on what's important



Introduction

AI agents
Accounting Agent
Payments Agent
Finance Agent
Project Management Agent

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

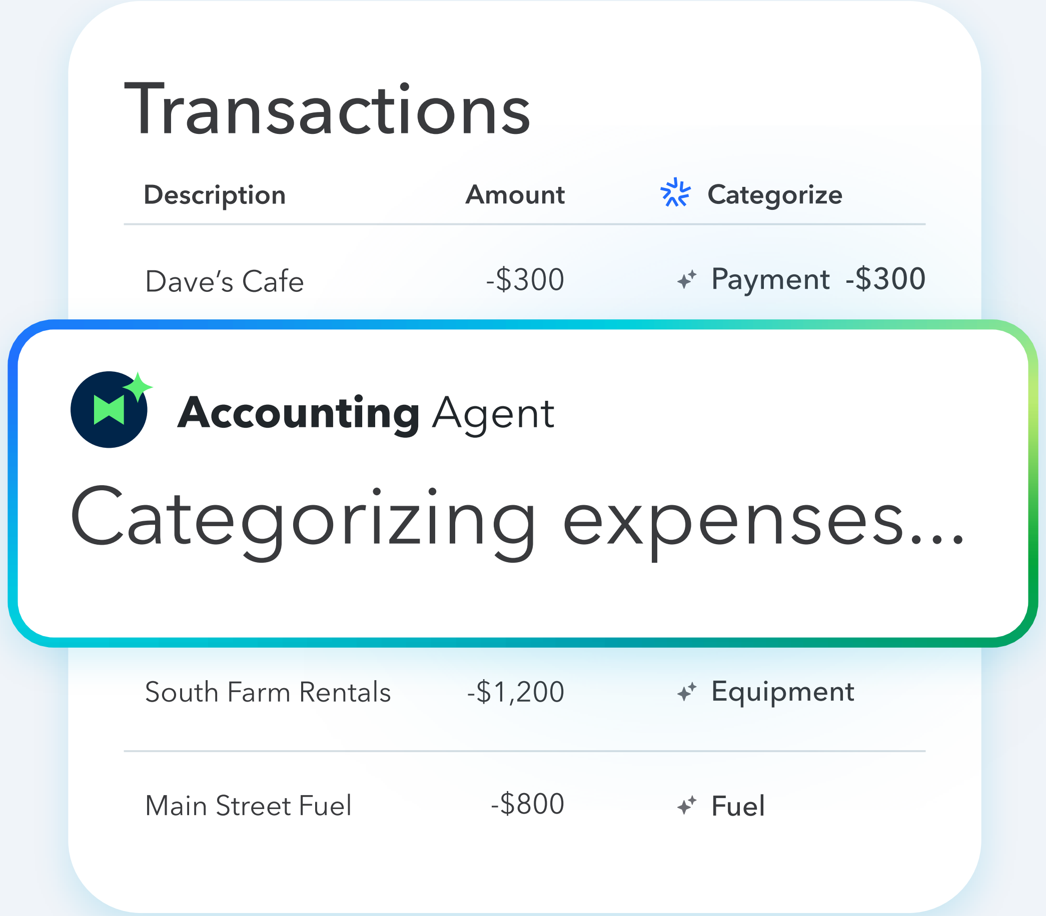
Accounting Agent

What

Help keep your books clean and accurate with the new Accounting Agent. This AI agent automatically suggests categories and matches for your incoming bank transactions, identifies your frequent vendors, and detects accounting anomalies in your financial statements. You'll also get personalized category and matching suggestions with explanations.

Why

Boost time savings by increasing bookkeeping accuracy and consistency so you can spend more time on your business. Your Accounting Agent handles tedious bookkeeping tasks with best-in-class accuracy in a fraction of the time.



Introduction

AI agents

Accounting Agent

Payments Agent

Finance Agent

Project Management Agent

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Payments Agent

What

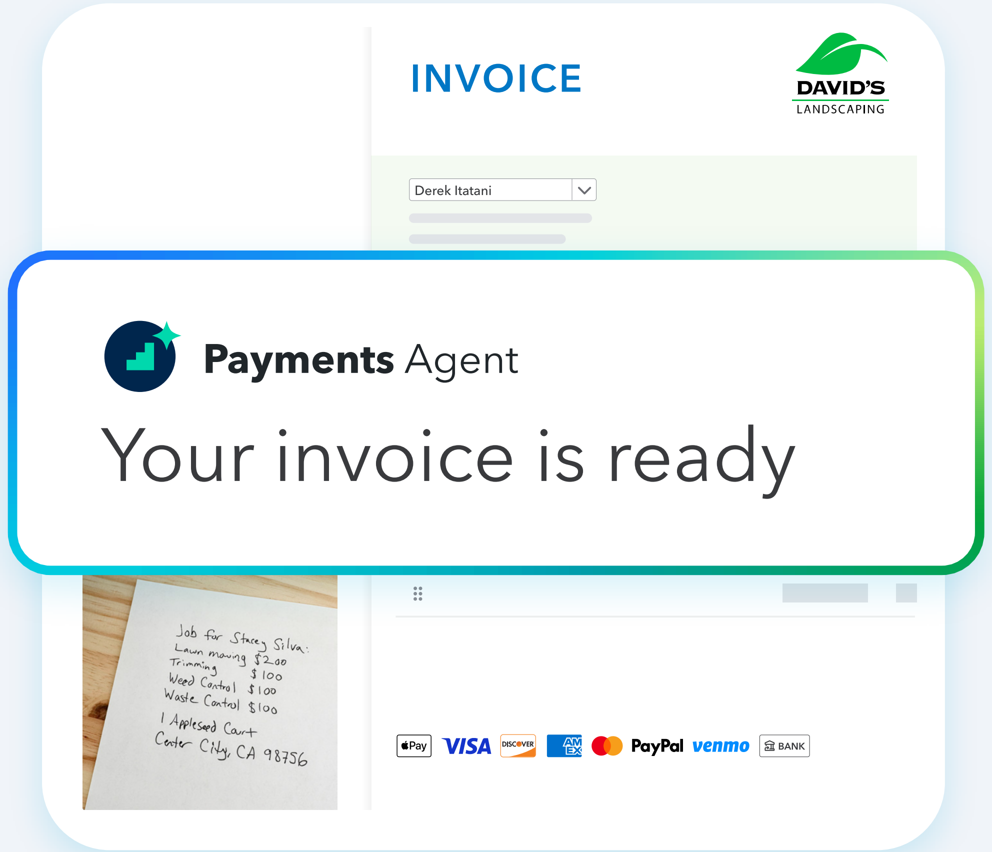
Automate and streamline payment collection with the Payments Agent. This new AI agent analyzes your customers' behaviors and implements personalized payment strategies to accelerate cash flow—including recurring payments, invoice reminders, deposits, and late fees. Use it to automatically draft and send personalized messages that share new payment options.

Get an assessment of your business's cash flow and uncover the most effective payment levers you can pull to improve it.

Why

Discover more efficiency and better money outcomes with tailored payment strategies that increase invoices paid in full, strengthen customer relationships, and provide visibility into your cash flow.

Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services. For more information about Intuit Payments' money transmission licenses, please visit https://www.intuit.com/legal/licenses/payment-licenses/.



Introduction

AI agents

Accounting Agent

Payments Agent

Finance Agent

Project Management Agent

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Finance Agent

What

The new Finance Agent acts as an intelligent partner in your financial performance management. The AI agent consolidates data from P&L and Balance Sheet to deliver monthly financial summaries.

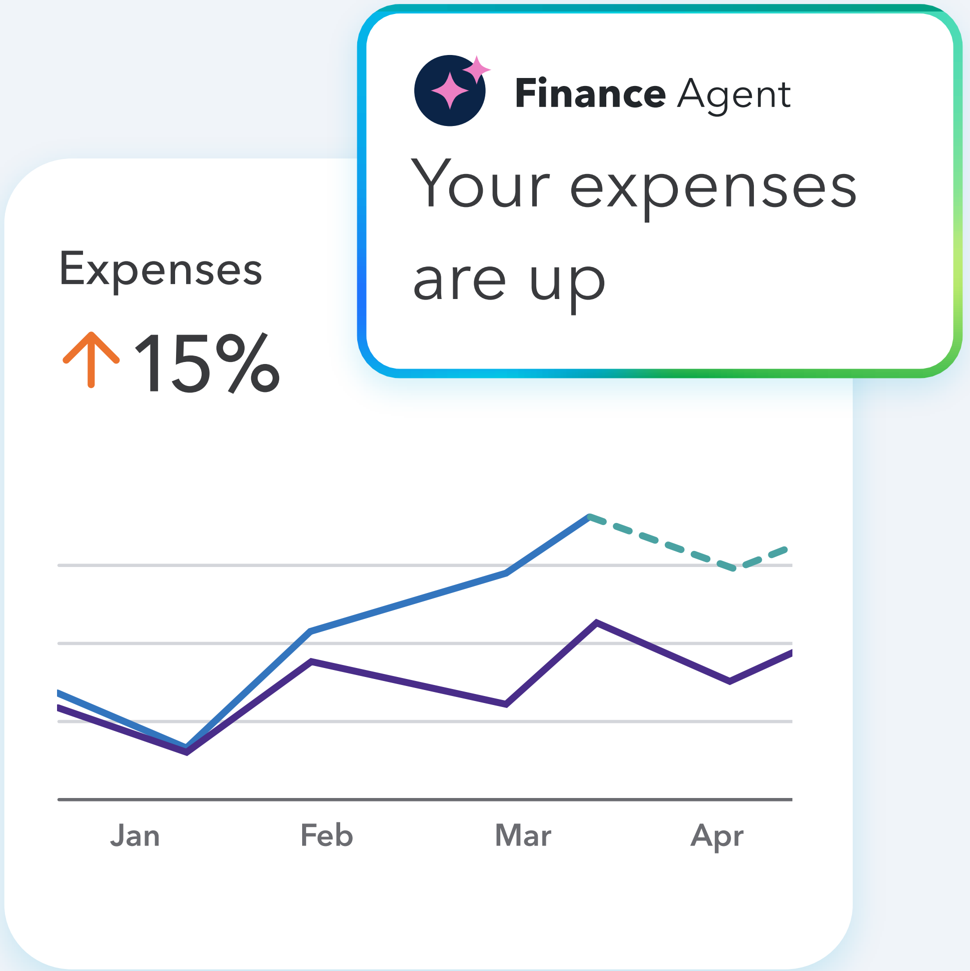
It continuously monitors financial performance and proactively identifies anomalies, trends, and deviations from your goals and budgets.

In addition, it analyzes performance across key metrics and projects potential variances from your existing forecast.

Use an assisted panel to get quick answers and detailed drill-downs for your financial performance questions.

Why

Improve productivity, decision-making, profitability, and customer confidence with your Finance Agent. Transform financial performance management from a reactive, time-consuming process into a proactive, insightful, and efficient driver of growth.



Introduction

AI agents
Accounting Agent
Payments Agent
Finance Agent
Project Management Agent

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Project Management Agent

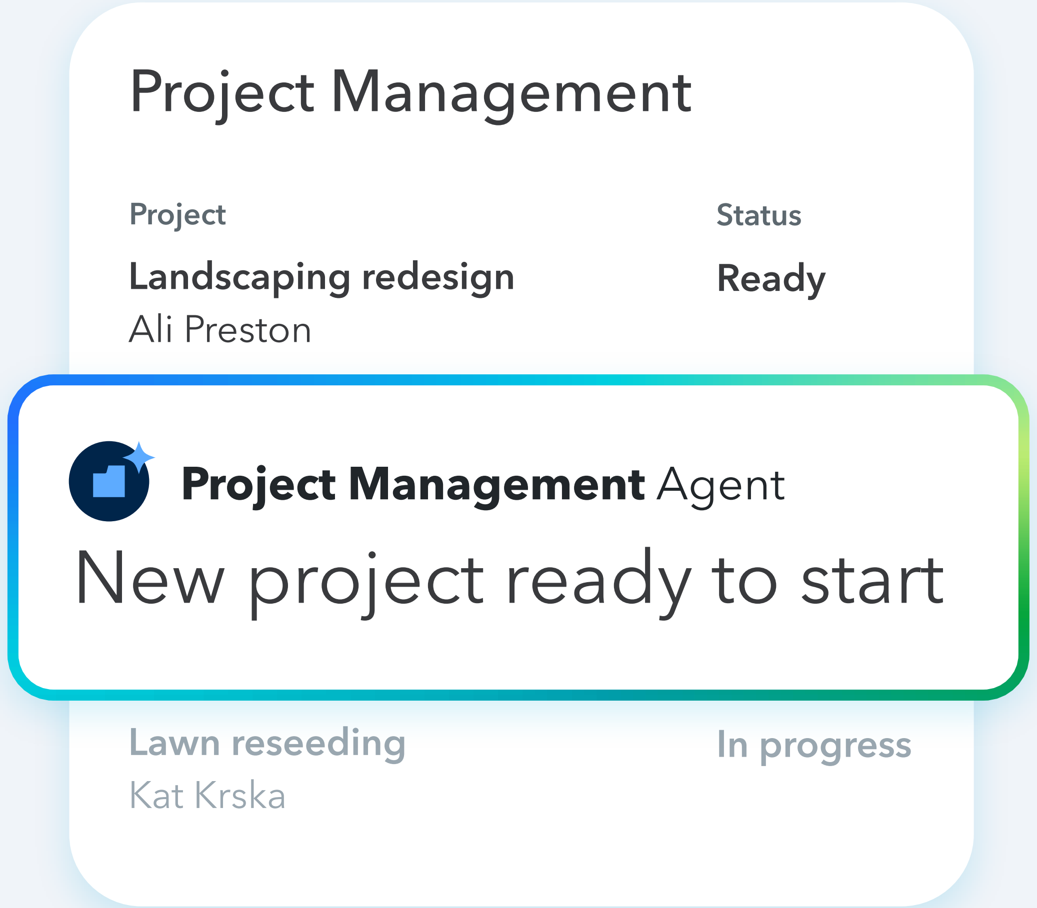
What

Automate the project lifecycle and get proactive insights on project profitability with the new Project Management Agent. Automatically create estimates and populate project details, tasks, deadlines, and priorities from uploaded documents. Based on your historical project data, your Project Management Agent will suggest profitability targets and automatically allocate project costs for more accurate project costing and budget management.

When closing out projects, you'll get summaries and highlights of project performance and profitability.

Why

Rely on your Project Management Agent to boost productivity, speed up project starts and billing cycles, improve project costing and cash flow management, and discover valuable insights.



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

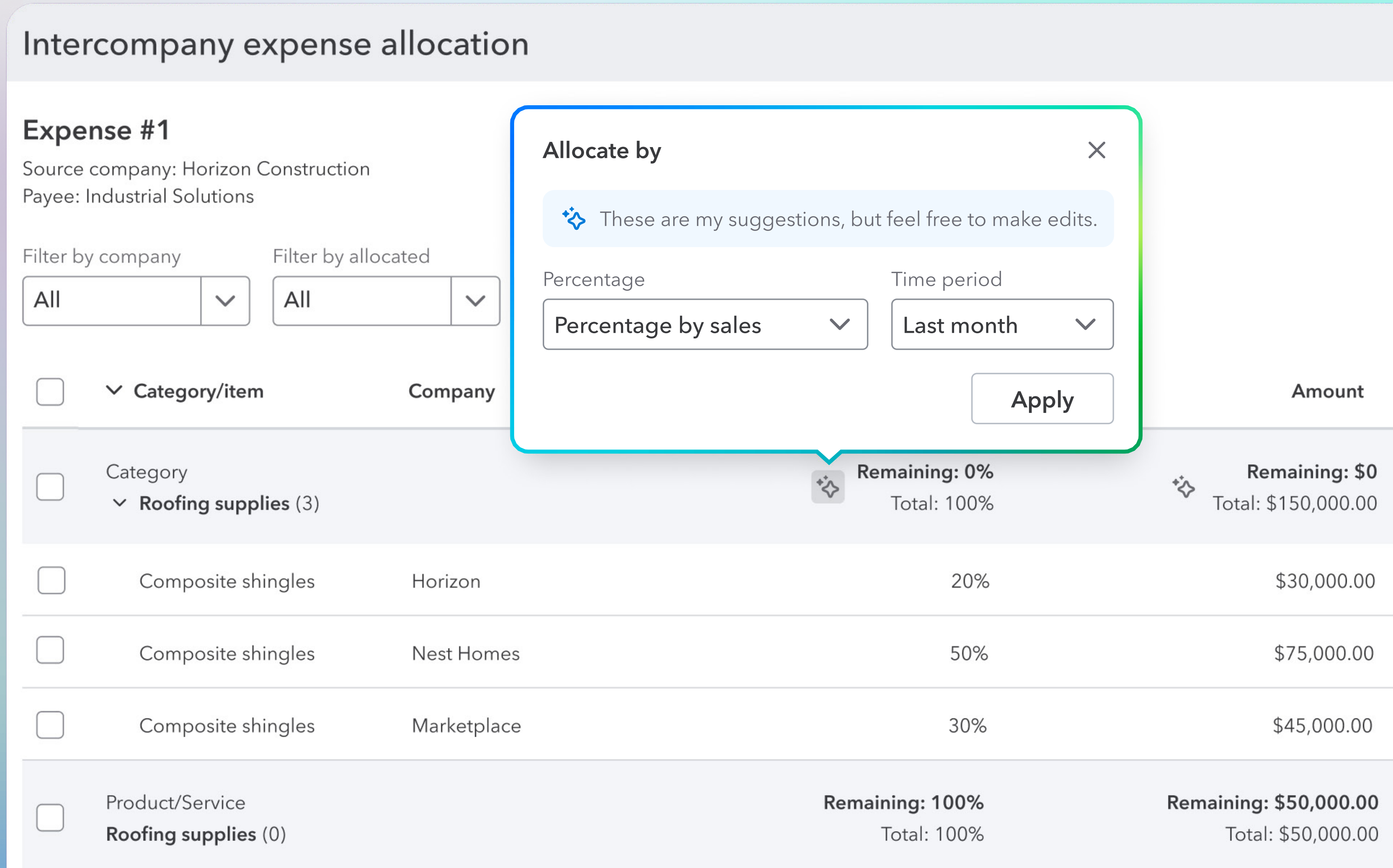
Projects

Customer management

Product performance updates

Multi-entity financial management

Automated and streamlined finances for valuable insights to help scale multi-entity businesses



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Multi-entity reports and dashboards

What

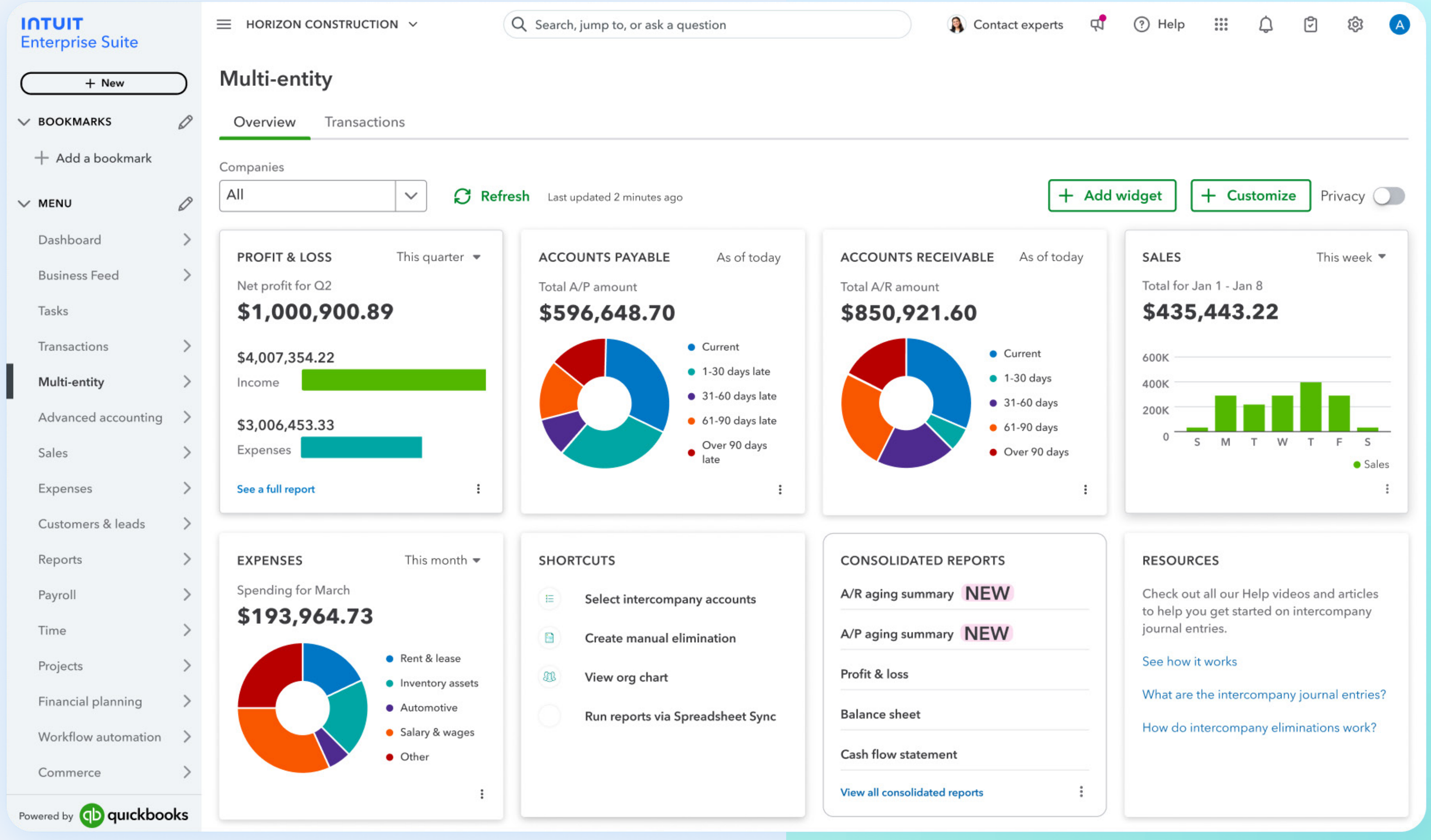
Get a comprehensive view of your multi-entity business's AP, AR, vendor expenses, and transactions with 4 new consolidated reports:

- A/P aging summary and detail report
- A/R aging summary and detail report
- Expenses by vendor
- Transaction detail report

Plus, get a holistic picture of your intercompany debits and credits right in the multi-entity hub without having to navigate to each entity.

Why

Streamline your multi-entity reporting and better manage your cash flow for more flexibility, profitability, and productivity for your business.



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Multi-entity reporting enhancements

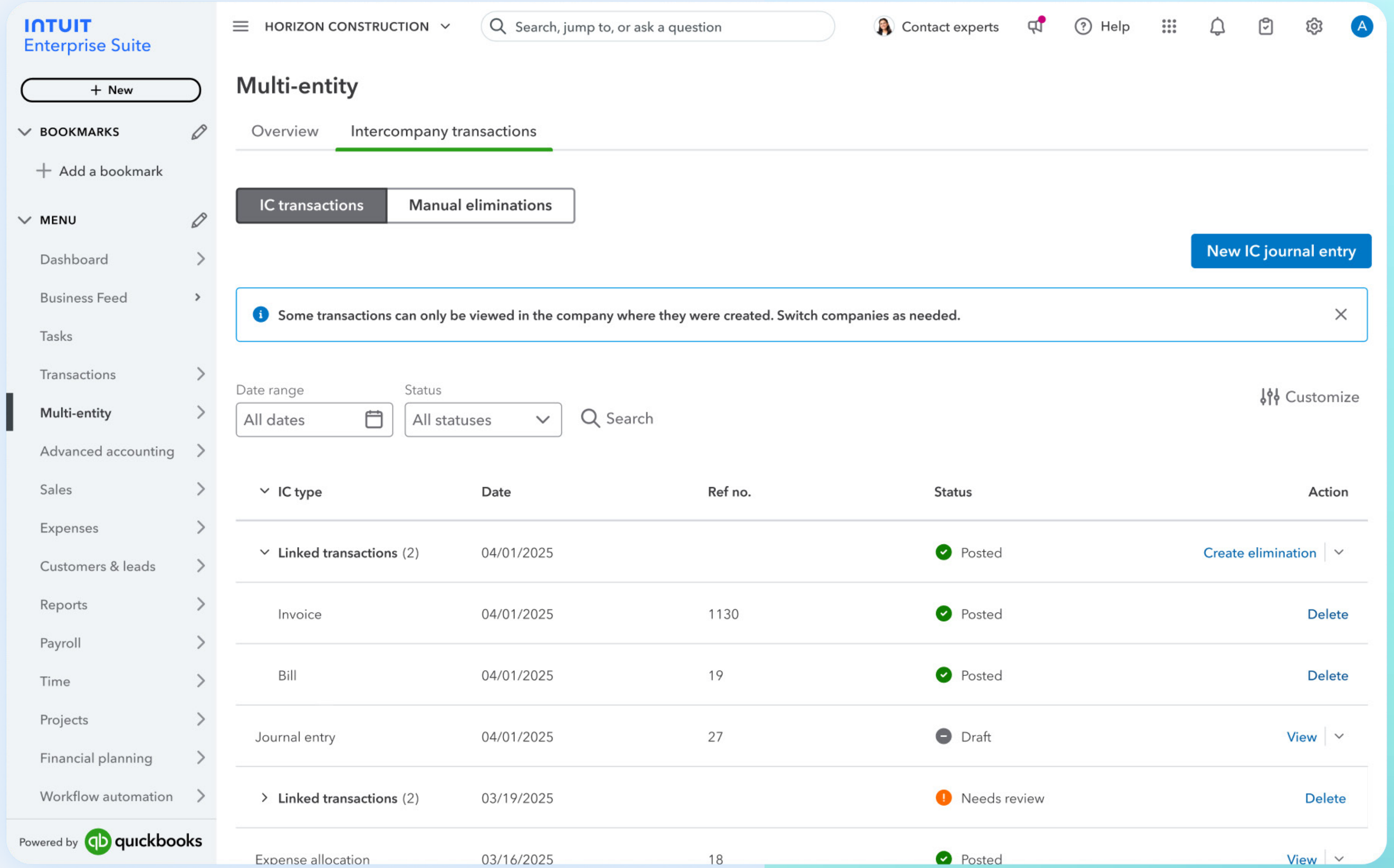
What

Enhancements to multi-entity reporting give you more granular control and deeper insight into your consolidated financial data:

- Drill down to the transaction level from high-level multi-entity summary reports.
- Simplify analysis across entities that use similar categorization by filtering or configuring consolidated reports by shared, cross-entity lists for charts of accounts or dimensions.
- Have Intuit Assist help clean up your vendor list, chart of accounts, and dimensions by automatically grouping similar data points, removing duplicates, and suggesting consistent vendor names.
- Save customized views for quick access to the multi-entity reports you use most.

Why

Generate more consistent views across your business with greater reporting customization and drill-down capabilities, so you can more easily assess business performance drivers and make quicker, more informed decisions.



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Done-for-you multi-entity allocations

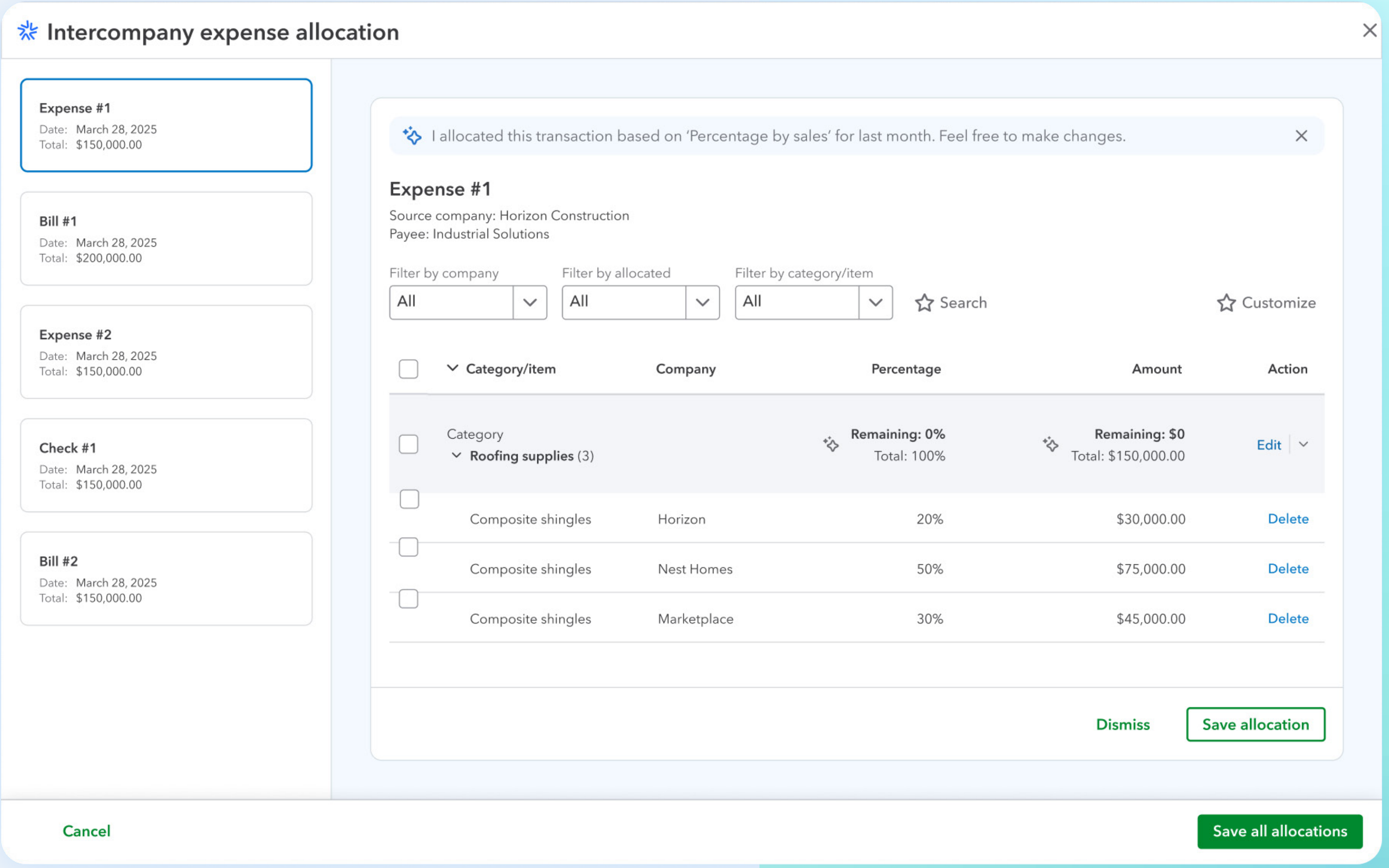
What

Intuit Enterprise Suite will learn from prior transactions to proactively suggest intercompany allocations for bills, expenses, checks, and bank feeds, letting you review and modify as needed. Expand on your multi-entity allocation capabilities by performing intercompany transactions from checks. Allocations can now be calculated based on percentage of sales, expenses, or assets across relevant entities down to the item, product, or service level. Plus, extend intercompany journal entry permissions to create these transactions to more users, and add the ability to save a draft intercompany transaction.

Why

Enhance productivity and avoid manual processes prone to error by automatically allocating intercompany transactions. Simplify the scalability of your intercompany accounting as your business grows.

Done-for-you allocation accuracy will increase as you perform intercompany allocations manually of similar, repeatable patterns. Automated allocations are not enabled until you have sufficient intercompany allocation history.



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

Projects

Customer management

Product performance updates

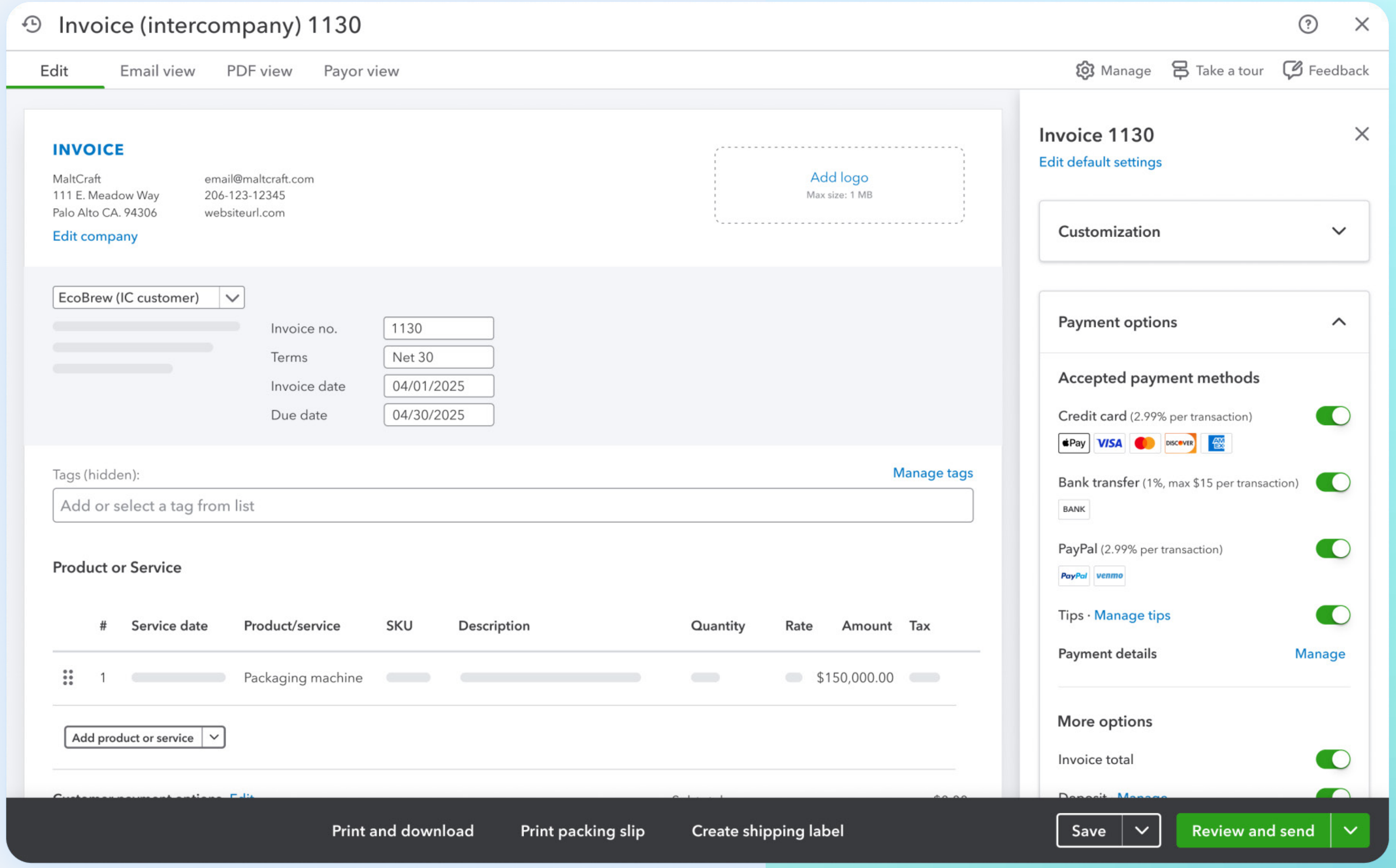
Intercompany sales

What

Streamline intercompany sales with the ability to invoice other entities that then appear as bills. Once accepted, the bills become linked transactions that flow into your consolidated reports. These linked transactions can be reviewed separately from external transactions in the multi-entity hub.

Why

Manage your intercompany sales process more efficiently by reducing the need for manual and error-prone journal entries. Maintain visibility of your intercompany activity and make more informed decisions to support your growth and profitability.



Introduction

AI agents

Multi-entity financial management

Multi-entity reports and dashboards

Multi-entity reporting enhancements

Done-for-you multi-entity allocations

Intercompany sales

Shared dimensions and chart of accounts

Business intelligence

Payroll

Projects

Customer management

Product performance updates

INTUIT Enterprise Suite

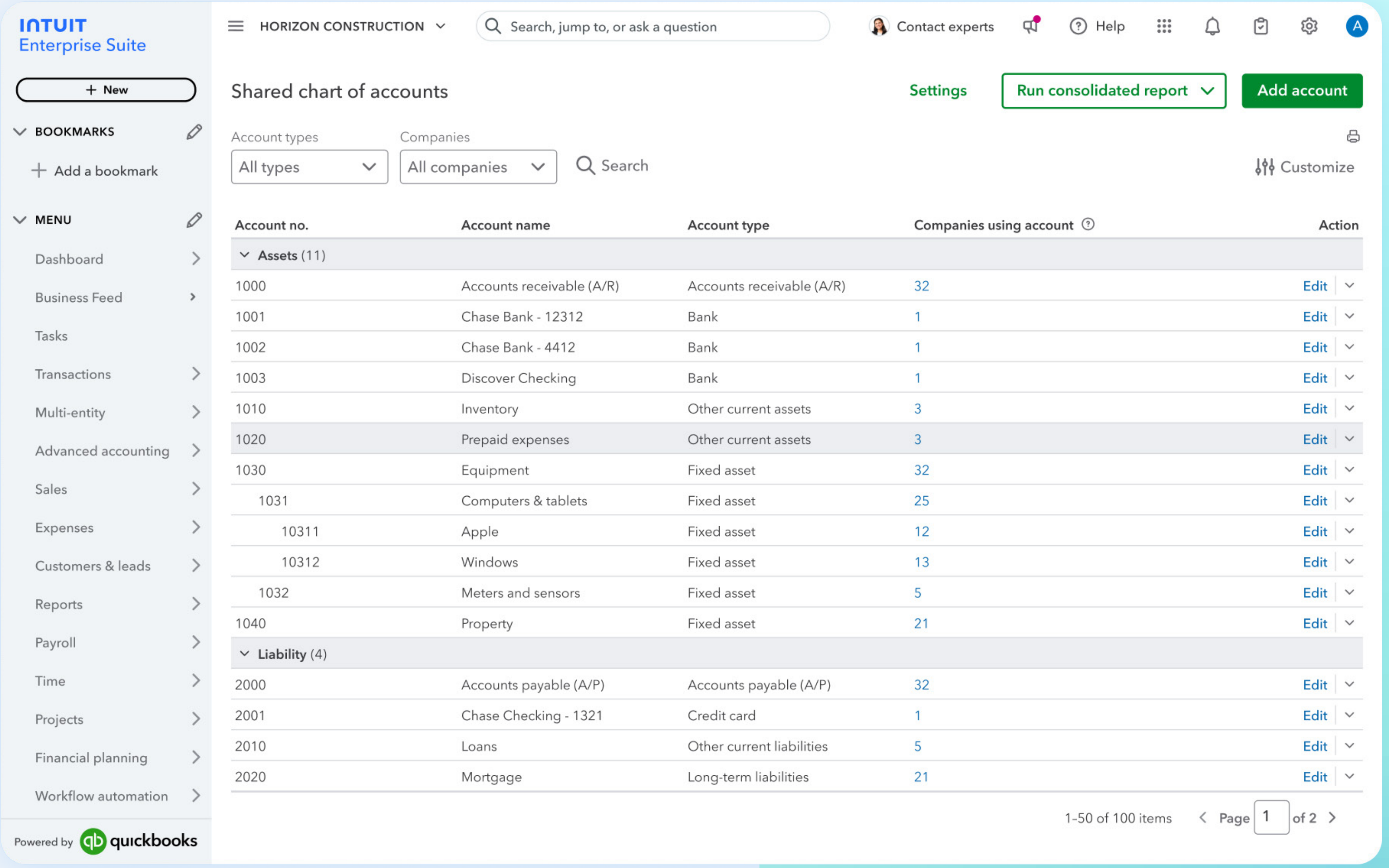
Shared dimensions and chart of accounts

What

Use Intuit Enterprise Suite to standardize your chart of accounts and dimensions across your entities. Dimensions will also be available on your intercompany journal entries. When you update your **Shared chart of accounts** or **Shared lists**, the changes will automatically be applied to all relevant entities and transactions.

Why

Achieve consistent reporting protocols across entities, so you can compare entities more quickly and see a unified, consolidated view without depending on manual comparisons and updates.



Introduction

AI agents

Multi-entity financial management

Business intelligence >

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

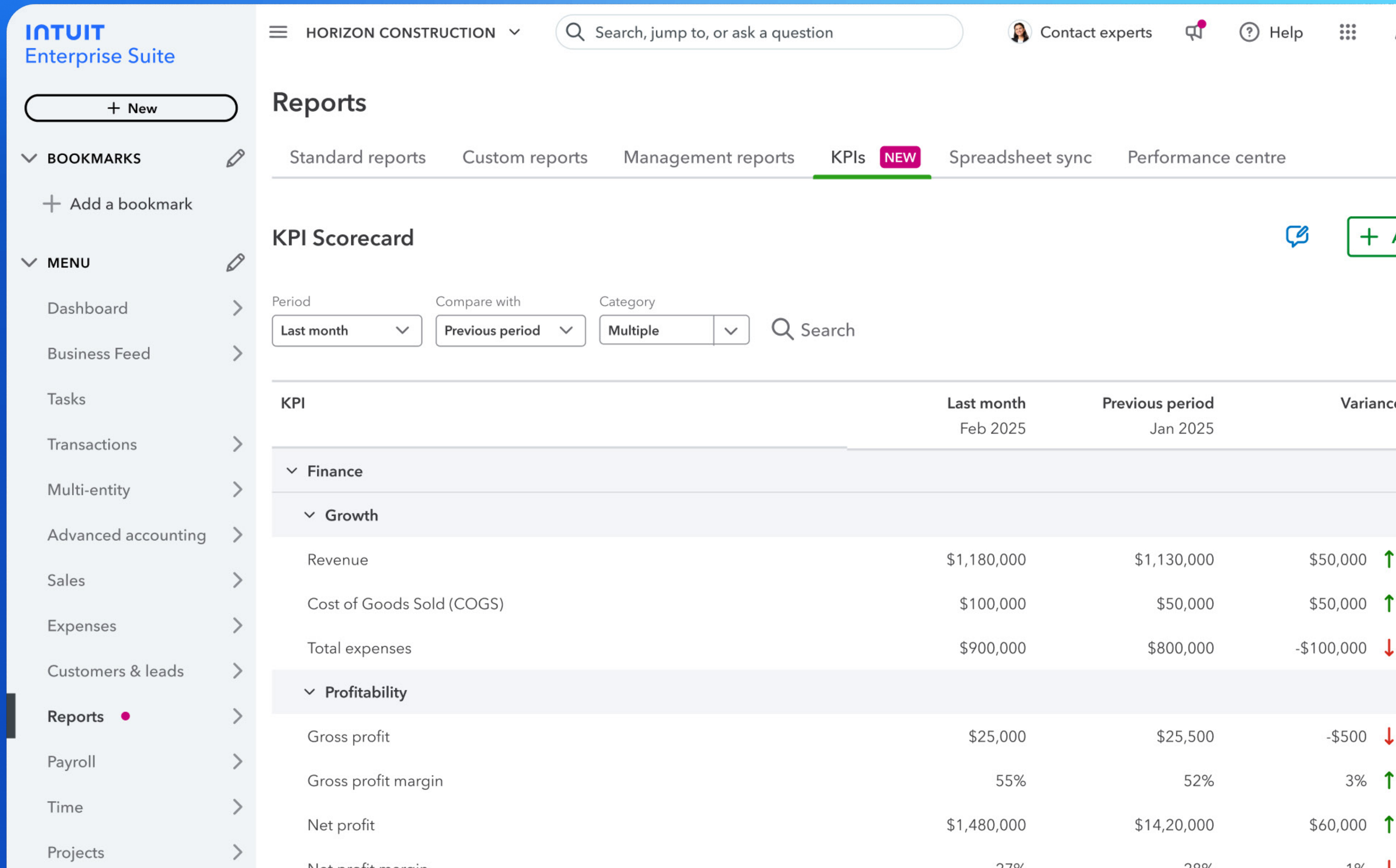
Projects

Customer management

Product performance updates

Business intelligence

Customizable reporting to streamline financial planning and analysis and drive the growth you want



INTUIT
Enterprise Suite

Introduction

AI agents

Multi-entity financial management

Business intelligence

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

Projects

Customer management

Product performance updates

INTUIT
Enterprise Suite

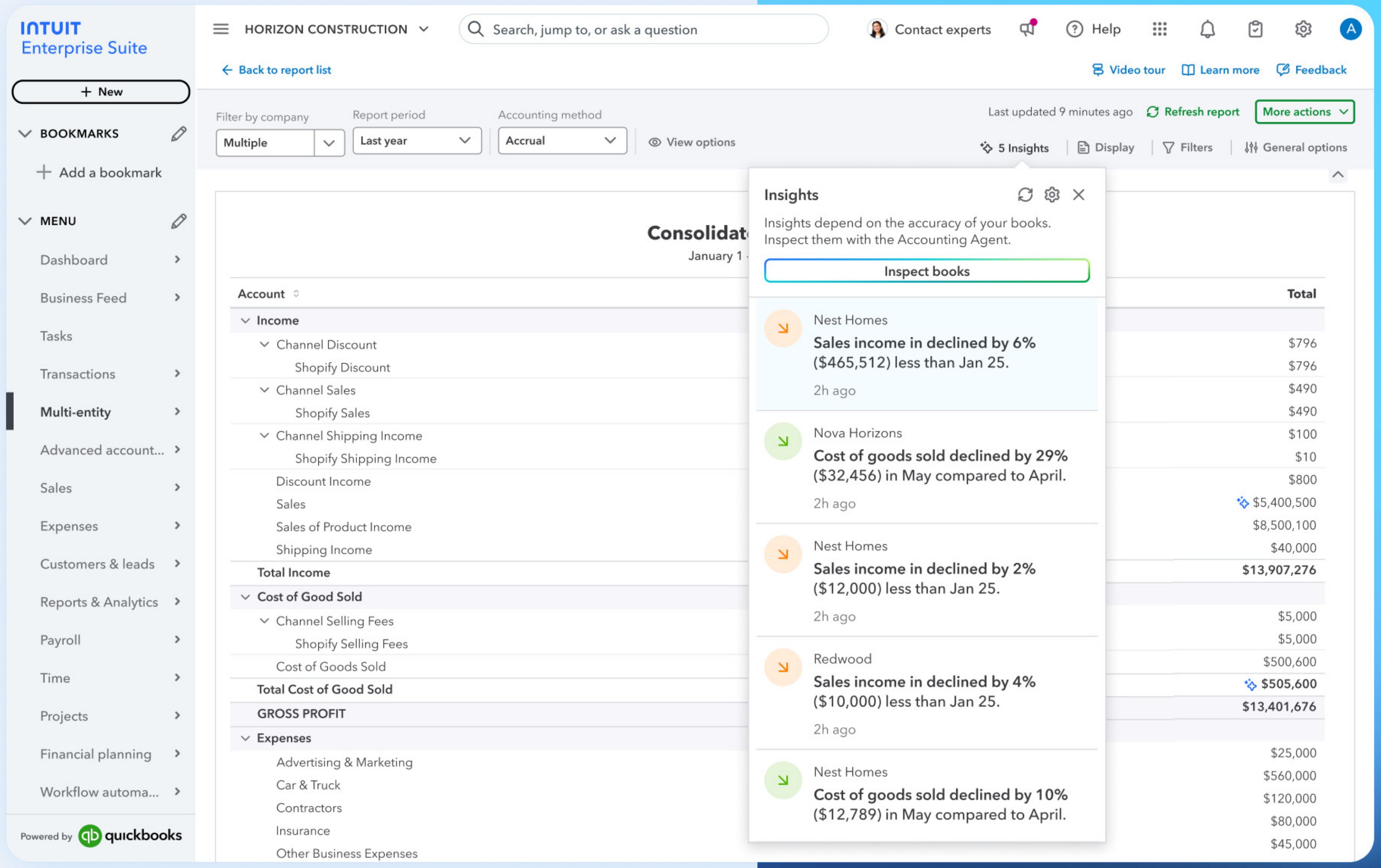
AI-powered report insights

What

Streamline your financial report review with AI-powered insights on your individual and consolidated P&L and Balance Sheet. Intuit Enterprise Suite will surface changes in trends you should be aware of, along with more detail in a visualization of historical data and a list of contributing factors with links for further exploration.

Why

Free up valuable time for strategic initiatives and help drive business growth by optimizing financial statement review to find evidence-based, actionable insights—at the speed of AI. Quickly identify trends and anomalies in your P&L and Balance Sheet accounts using your latest data without relying on manual interpretation of financial statements.



Introduction

AI agents

Multi-entity financial management

Business intelligence

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

Projects

Customer management

Product performance updates

KPI scorecard

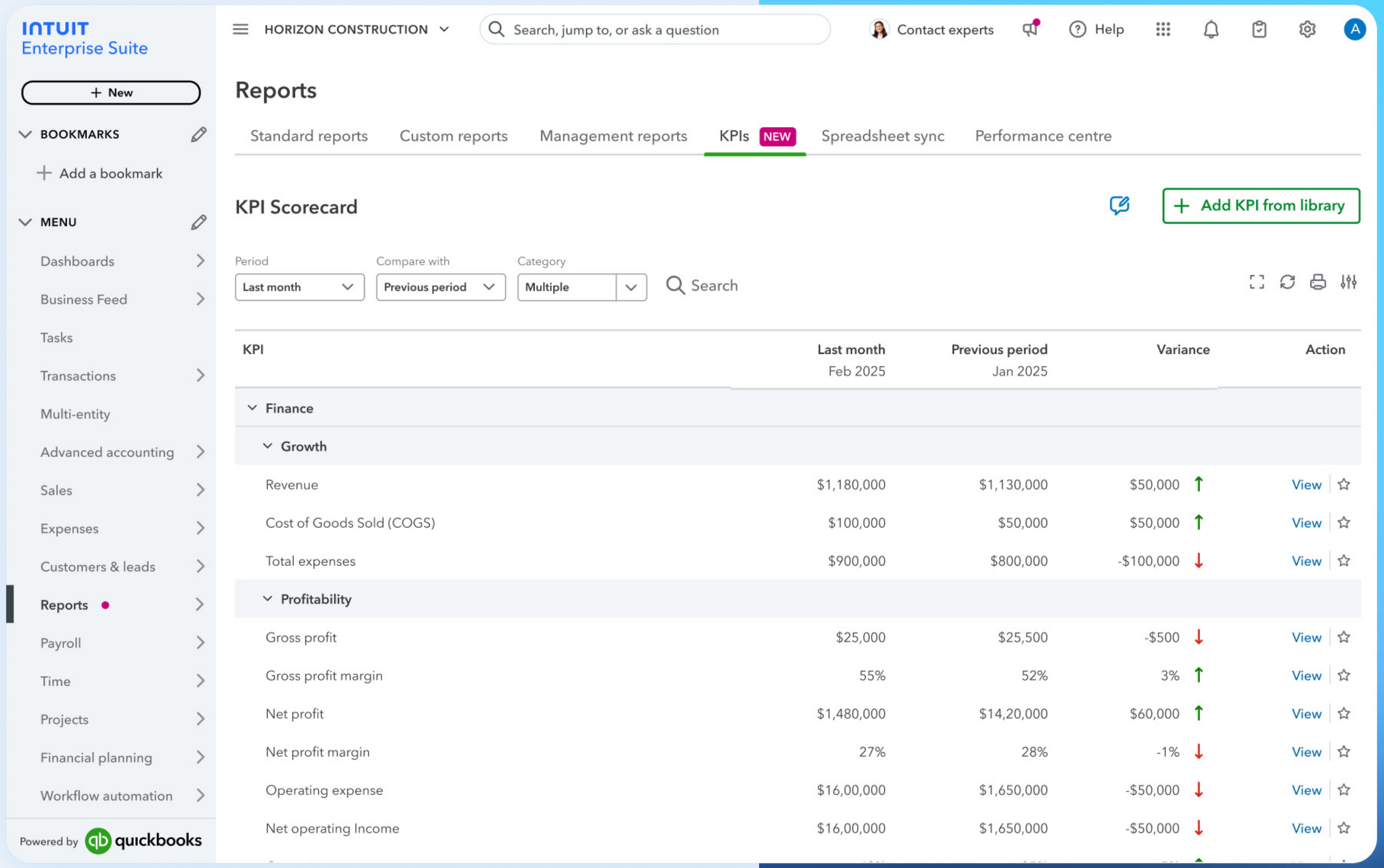
What

Track your business's performance quickly and effectively by building a customized scorecard of key performance indicators using an exclusive library of 30+ pre-defined KPIs across growth, profitability, cash flow, liquidity, and efficiency measures. Click on each KPI to see a detailed view of its description, formula calculation, relevant time period, and trend graph visualization.

Why

Align your team to one set of objectives and enhance strategic accountability with a comprehensive set of KPIs that provides a complete overview of financial health and performance.

Functionality available at the entity level only.



INTUIT Enterprise Suite

Introduction

AI agents

Multi-entity financial management

Business intelligence

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

Projects

Customer management

Product performance updates

AI-powered cash flow forecasting | FP&A

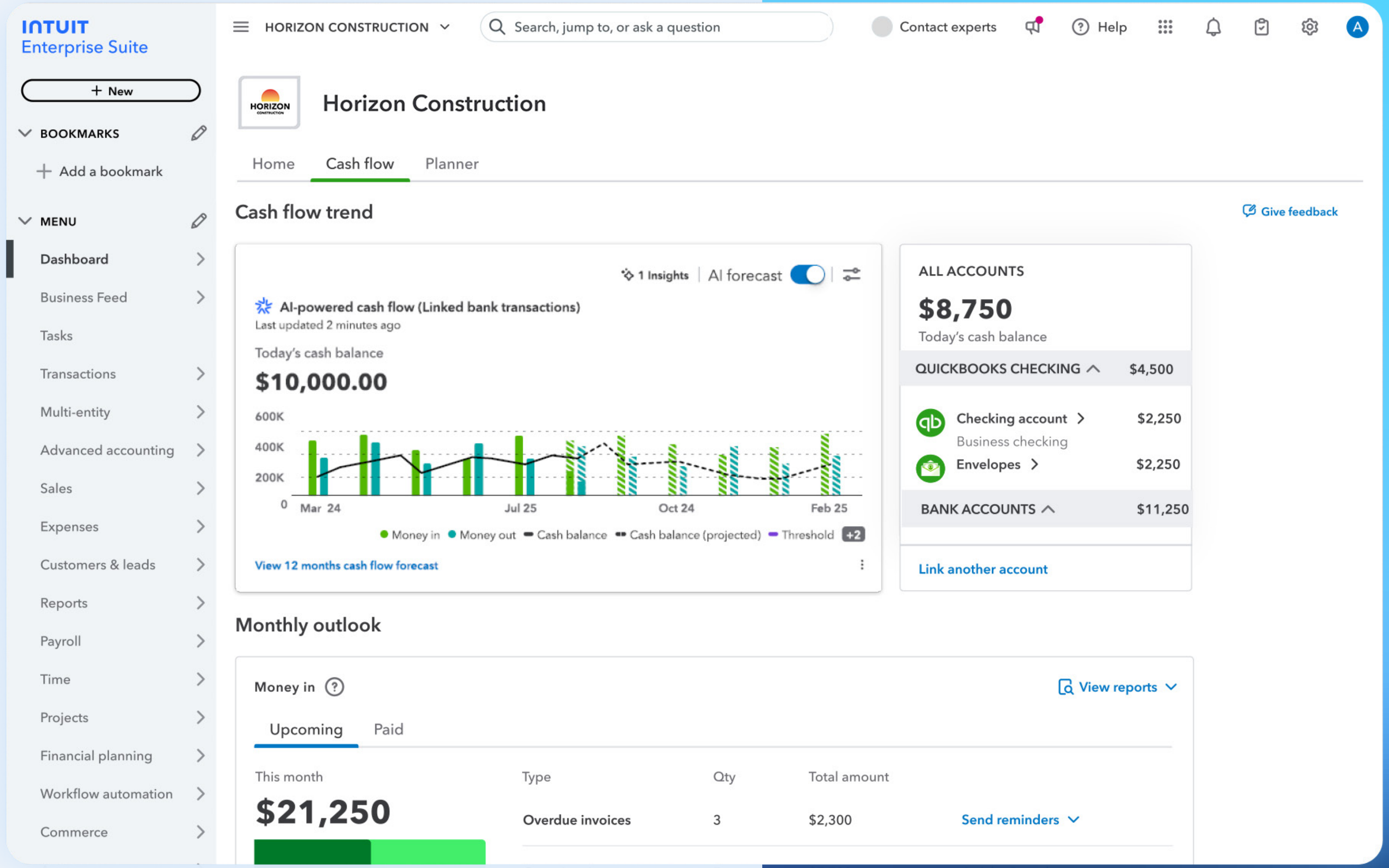
What

Use the enhanced cash flow tool to create a 13-week and 12-month cash flow forecast. Filter from monthly or weekly views for granular, short-term planning so you can make timely adjustments to your financial operations. Delve into deeper detail to see the transaction data that influences your cash flow projections. Fine-tune your forecast by adding or editing planned items to more accurately reflect anticipated cash movements.

Why

Save time and avoid manually gathering and analyzing data by using AI to help you predict and manage cash flow. Help your business thrive with more informed decisions on investments and working capital.

Functionality available at the entity level only.



INTUIT Enterprise Suite

Introduction

AI agents

Multi-entity financial management

Business intelligence

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

Projects

Customer management

Product performance updates

3-way financial planning | FP&A

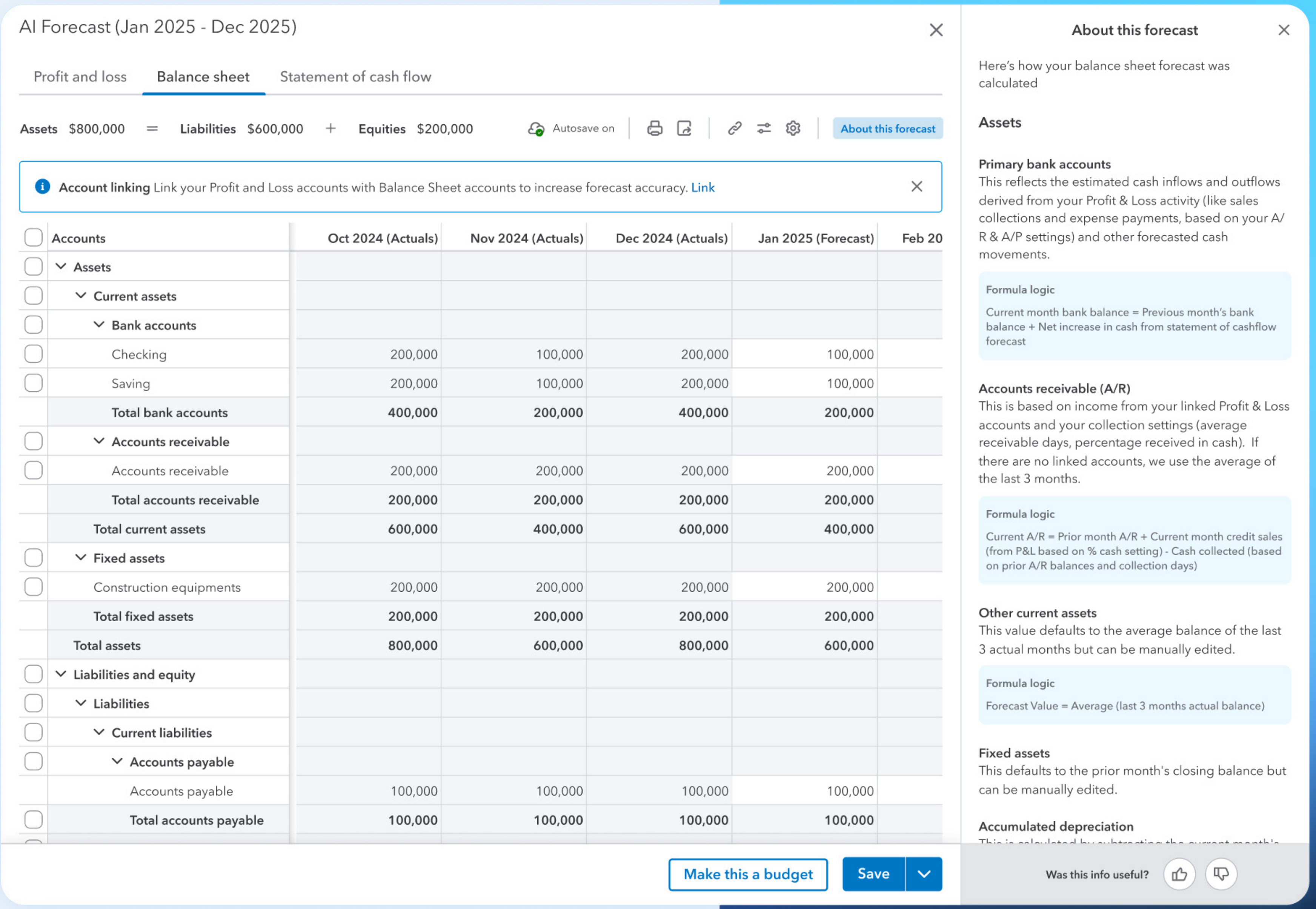
What

Create a comprehensive financial forecast across your P&L, Balance Sheet, and Statement of Cash Flows by linking the appropriate P&L accounts with the corresponding Balance Sheet accounts. When you adjust a forecast, the change's impact will flow through to all three financial statements. Edit the rows of your forecast to reflect changes in your strategy, and quickly create a budget using your P&L or Balance Sheet forecast.

Why

Better plan and communicate your business goals to key stakeholders by maintaining a unified forecast across all three financial statements. Stay on track and make informed decisions along the way by converting a forecast into your budget.

Functionality available at the entity level only.



INTUIT Enterprise Suite

Introduction

AI agents

Multi-entity financial management

Business intelligence

AI-powered report insights

KPI scorecard

AI-powered cash flow forecasting | FP&A

3-way financial planning | FP&A

Enhanced dimensions

Payroll

Projects

Customer management

Product performance updates

Enhanced dimensions

What

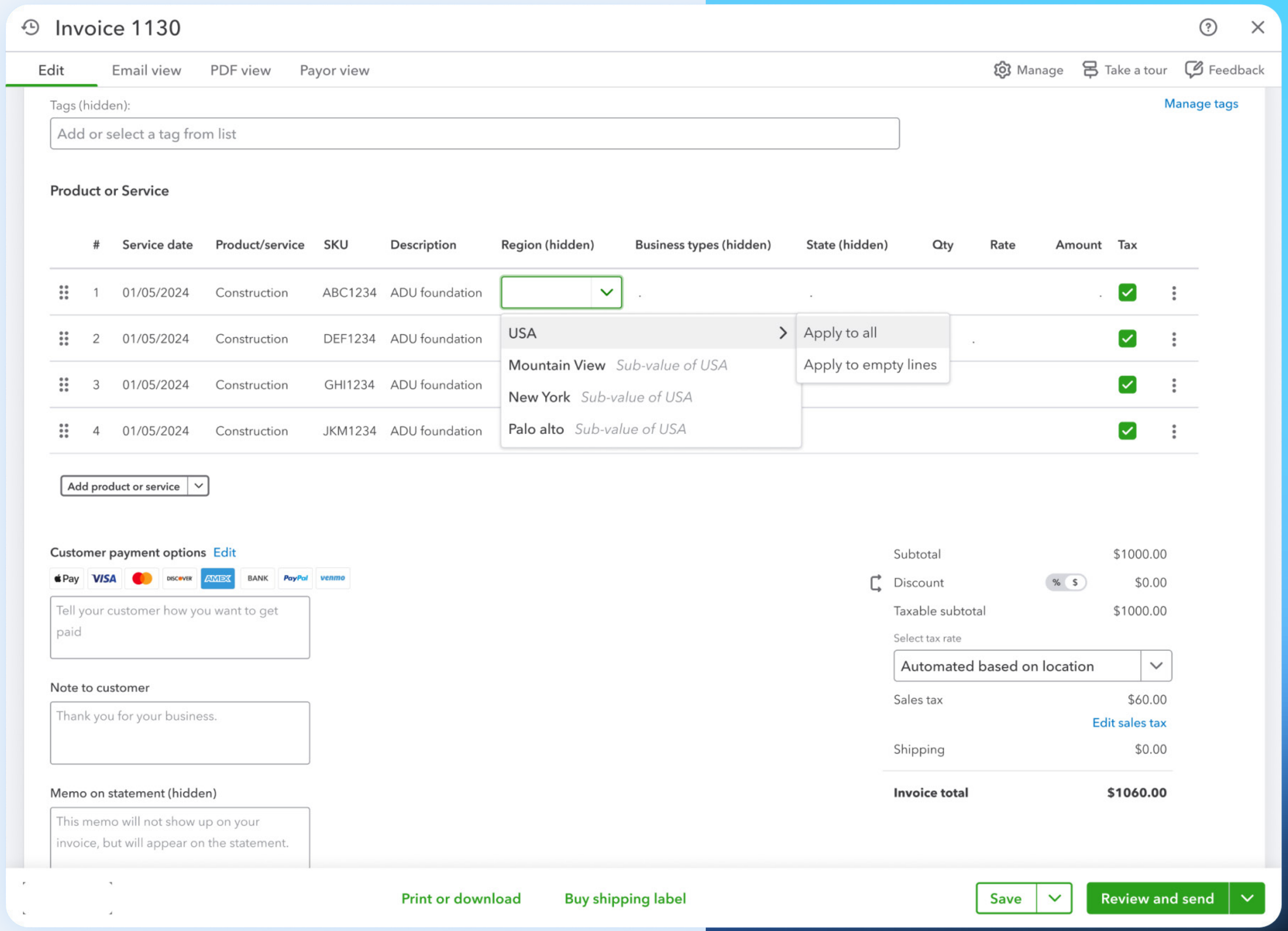
Improve the depth and accuracy of your dimensional reporting and analysis while optimizing efficiency.

- Assign dimensions to products and services and fixed assets list items up front so they automatically populate on forms like invoices and bills.
- Quickly assign dimensions on transactions using **Apply to all** or **Apply to empty lines**.
- Apply dimensions to two more transaction types: delayed credits and delayed charges.

Why

Apply product and service and fixed-asset dimensions consistently across related transactions rather than assigning them one at a time. More easily scale your business with the ability to add dimensions to high volumes of data for detailed analysis.

Functionality available at the entity level only.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Effective dating for pay types

Paycheck corrections for closed quarters

Employee compensation enhancement

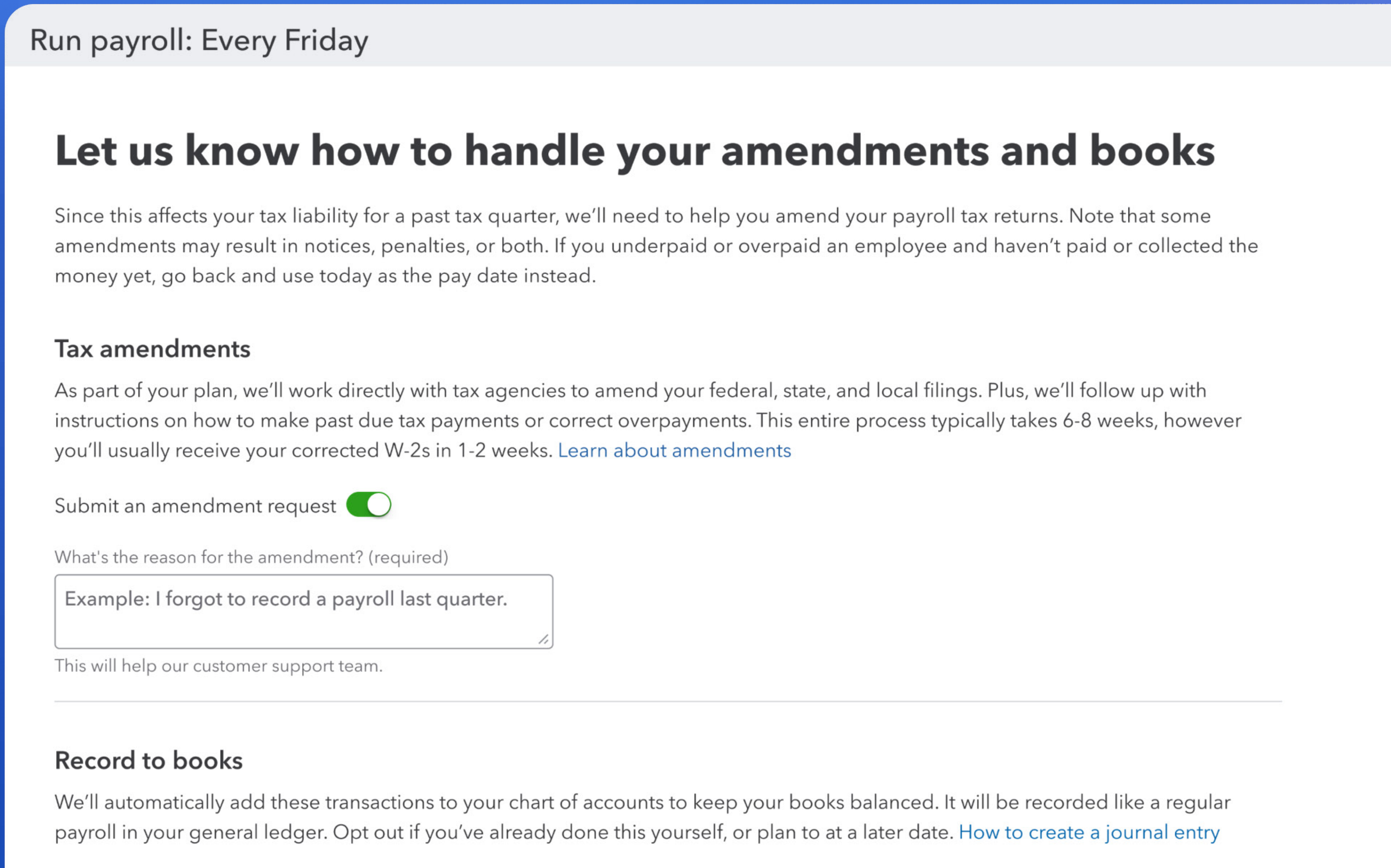
Projects

Customer management

Product performance updates

Payroll

Add flexibility and capability to take care of your team at every pay period



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Effective dating for pay types

Paycheck corrections for closed quarters

Employee compensation enhancement

Projects

Customer management

Product performance updates

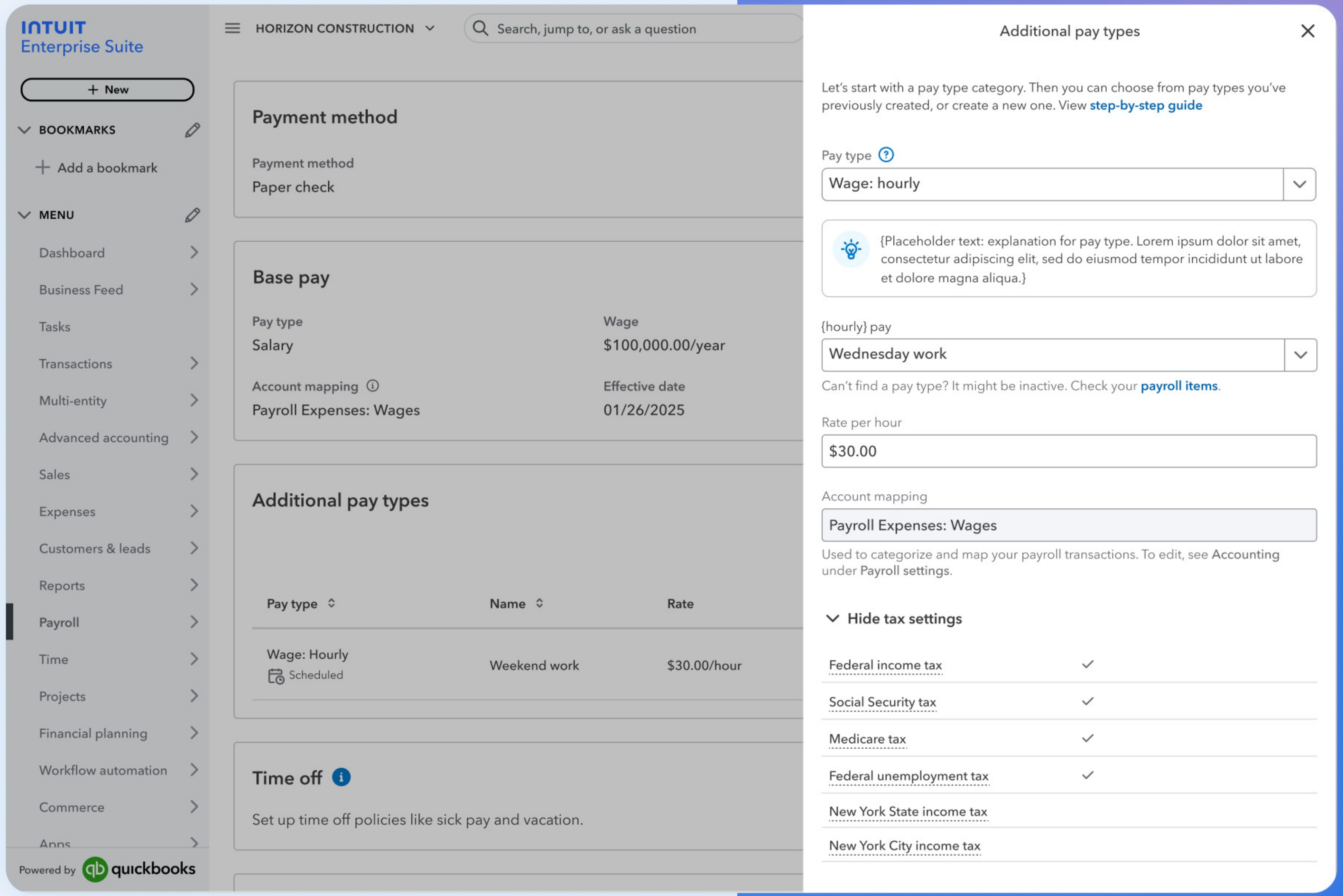
Effective dating for pay types

What

Schedule changes to employee compensation (base pay and additional pay types) to take effect in a future pay period. For one-off pay type assignments, add start and end dates, so that a pay type can be automatically assigned and unassigned from the employee.

Why

Save time in planning and setting pay changes and compensation updates, with no need for outside solutions or manual reminders.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Effective dating for pay types

Paycheck corrections for closed quarters

Employee compensation enhancement

Projects

Customer management

Product performance updates

Payroll

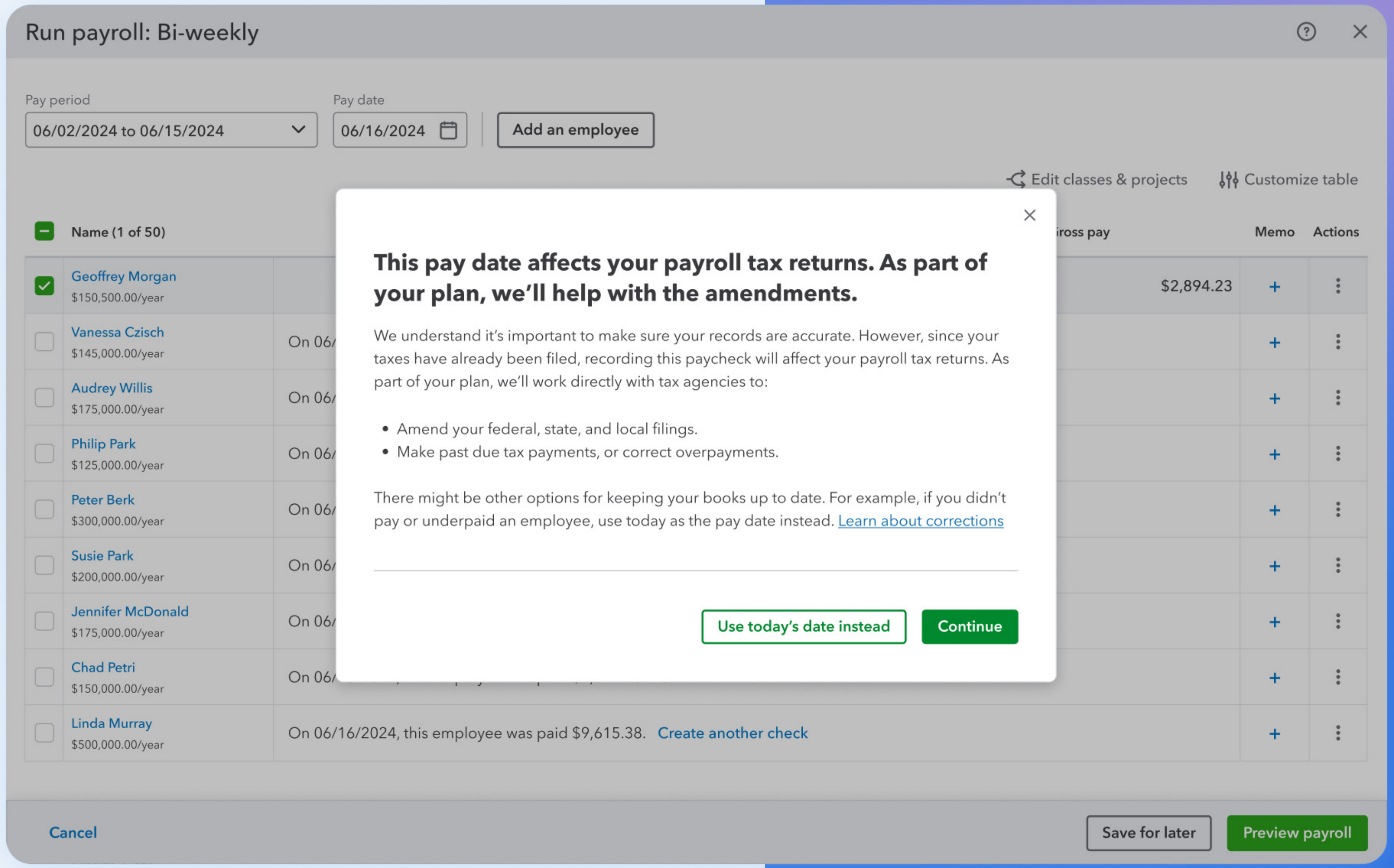
Paycheck corrections for closed quarters

What

For a closed quarter in the current year or year before, you can now void, edit, and record past paychecks. As you record a past paycheck, you can decide whether to sync the transaction to your books. With Payroll Elite, you can also request an amendment in Intuit Enterprise Suite and we will work with tax agencies directly to amend and process necessary tax payments.

Why

Reduce manual work and support calls with more flexibility to add past payroll transactions throughout the year and the year before.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Effective dating for pay types

Paycheck corrections for closed quarters

Employee compensation enhancement

Projects

Customer management

Product performance updates

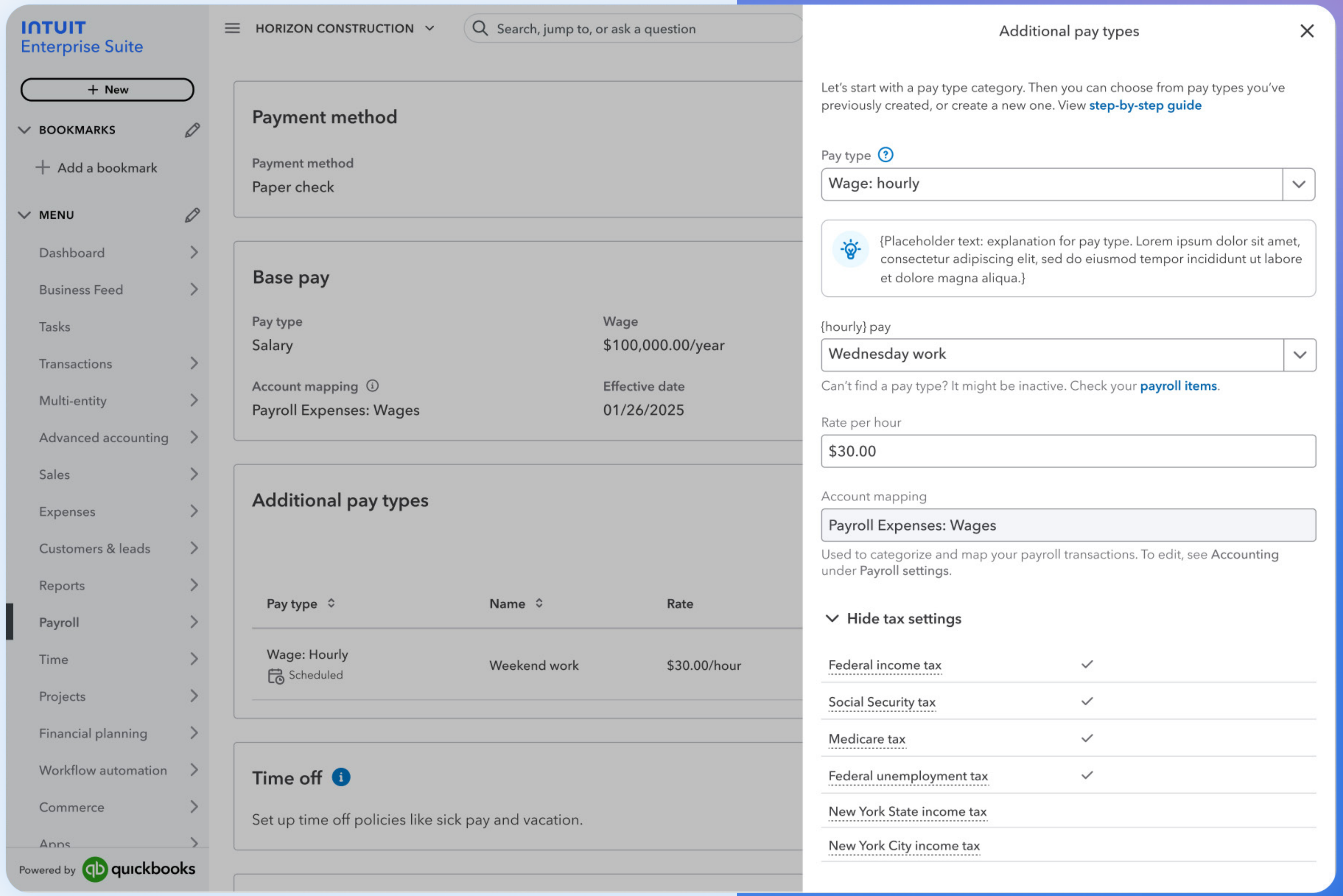
Employee compensation enhancements

What

When setting up or editing compensation in an employee's profile, you'll see the account mapping of each pay type to help you keep it up-to-date. Additional pay types include taxability settings so you'll know how the pay types will be taxed and mapped to various tax forms (like the W-2). Additional compensation enhancements include the ability to add an hourly rate for a salaried employee.

Why

Help ensure bookkeeping accuracy with the ability to view account mapping for each pay type. Get the flexibility to mix salary and hourly compensation types within a payroll run for an employee.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Deposits on estimates

Employee cost rate calculator

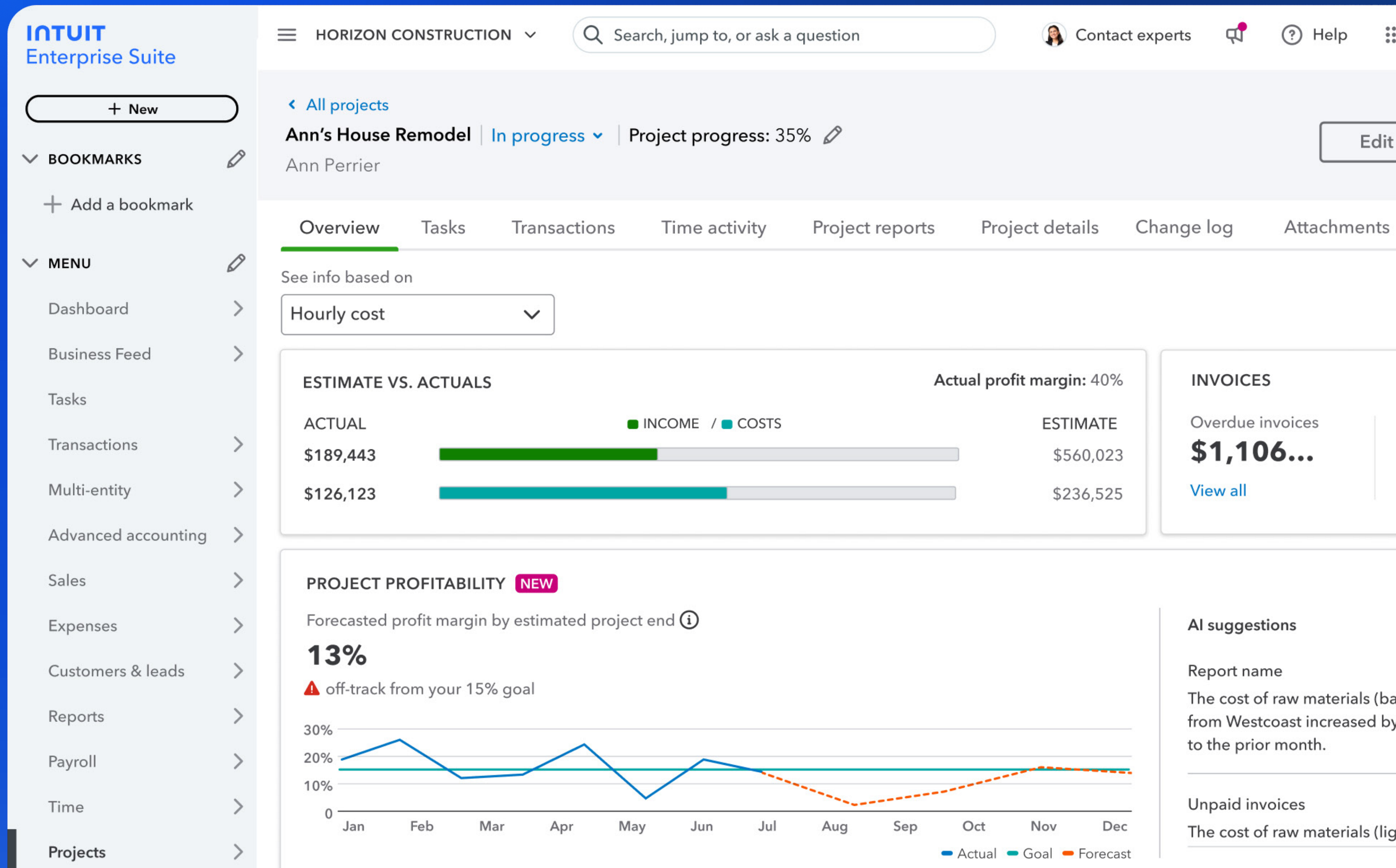
Enriched project budgeting

Customer management

Product performance updates

Projects

Features tailored to drive project-based performance



INTUIT
Enterprise Suite

Introduction
AI agents
Multi-entity financial management
Business intelligence
Payroll
Projects
Deposits on estimates
Employee cost rate calculator
Enriched project budgeting
Customer management
Product performance updates

Projects

Deposits on estimates

What

Whether or not your business uses Payments, you can now request a deposit on an estimate from your customer. To provide accurate accounting, a deposit payment will be recorded in your books as a liability until the estimate converts into an invoice. In addition, an approved and paid estimate will be marked as approved and will not auto-convert to an invoice. If your business uses Payments, you can accept deposit payments online by ACH, card, or Apple Pay.

Note: Payments through PayPal and Venmo are not yet available.

Why

Start projects off on the right foot with a seamless process for accepting deposits on estimates. With this capability, your business can secure a customer's commitment and a clear go-ahead to plan a project and allocate resources. Help improve cash flow for upfront material and labor costs, mitigate the financial risk of starting a project, and uphold project policies and procedures without outside solutions that require extra time and reconciliation. Help ensure your accounting process is accurate, transparent, and streamlined with automatic recording of deposits to your books.

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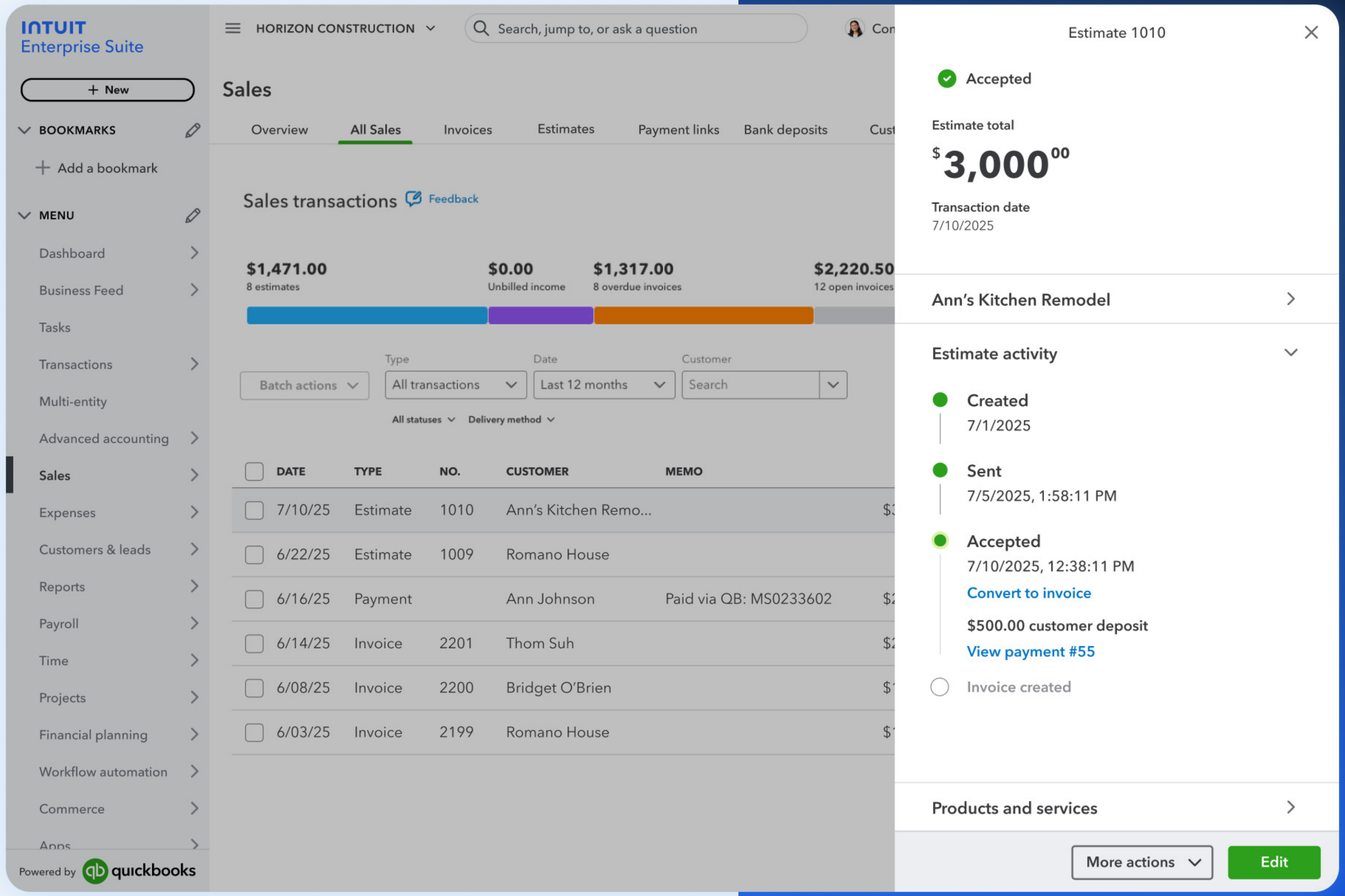


Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Deposits on estimates

Employee cost rate calculator

Enriched project budgeting

Customer management

Product performance updates

Projects

Employee cost rate calculator

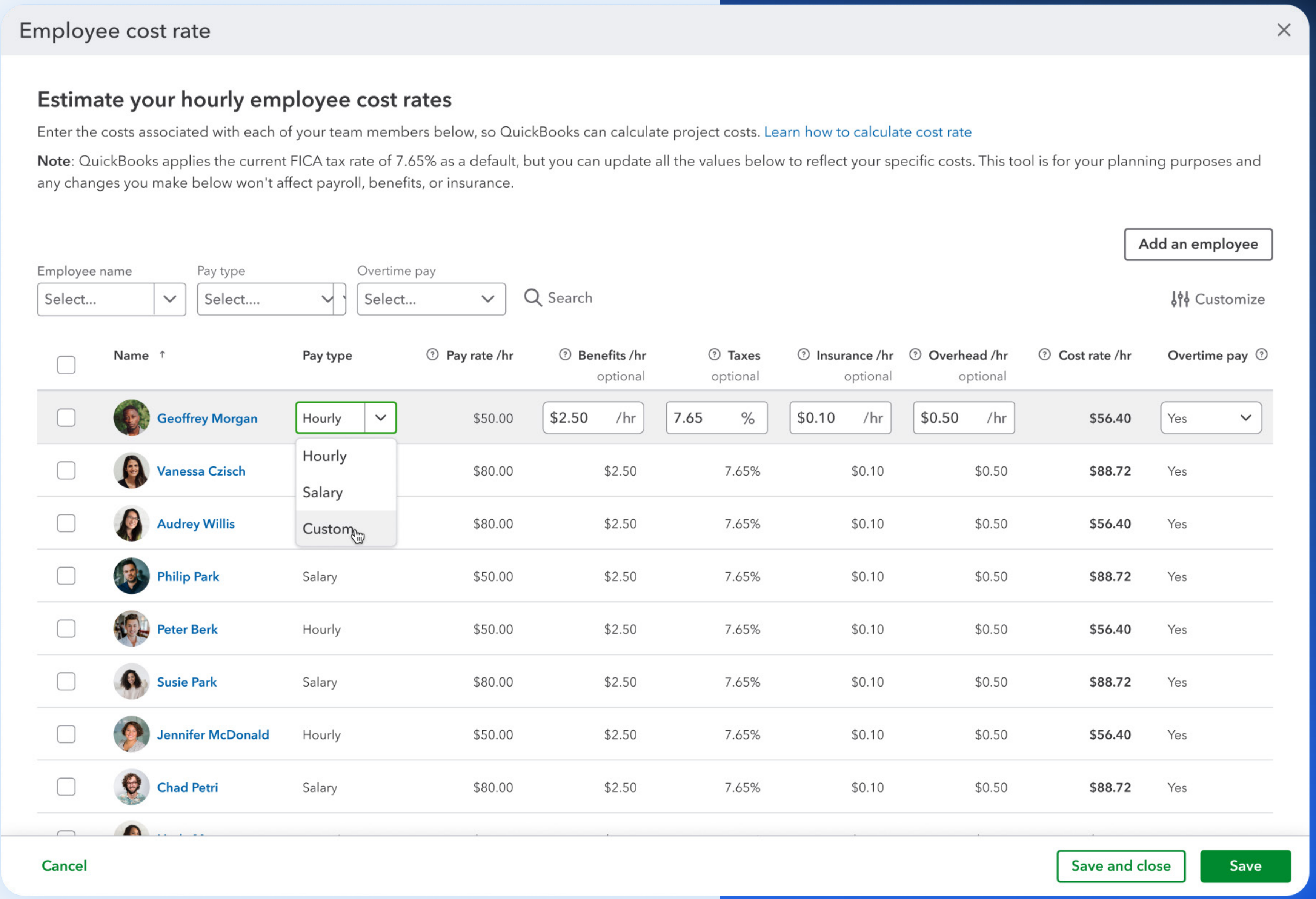
What

Quickly determine an hourly employee's cost rate with a built-in calculator in **Projects**. The calculator will guide you through the costing journey by providing entry fields for common factors like pay rate, benefits, taxes, insurance, and overhead. For those using Payroll, employees' pay types and pay rates will automatically appear in the calculator. Once calculated, cost rates will automatically apply to time events added to **Projects**. Update cost rates for multiple employees at once to address organization-wide changes in benefits and overhead and reduce the risk of error.

Note: The employee cost rate calculator does not yet calculate overtime cost rates.

Why

Save your project-based business time and resources and make more informed resourcing, pricing, and financial management decisions by understanding your true cost of labor and getting an up-to-date picture of profitability. Factor in costs for each employee and project without an outside solution or time-consuming steps that are prone to error. With enhanced visibility on employee cost rates, you can analyze profitability, adjust your project resourcing, and create more accurate project budgets.



Introduction
AI agents
Multi-entity financial management
Business intelligence
Payroll
Projects
Deposits on estimates
Employee cost rate calculator
Enriched project budgeting
Customer management
Product performance updates

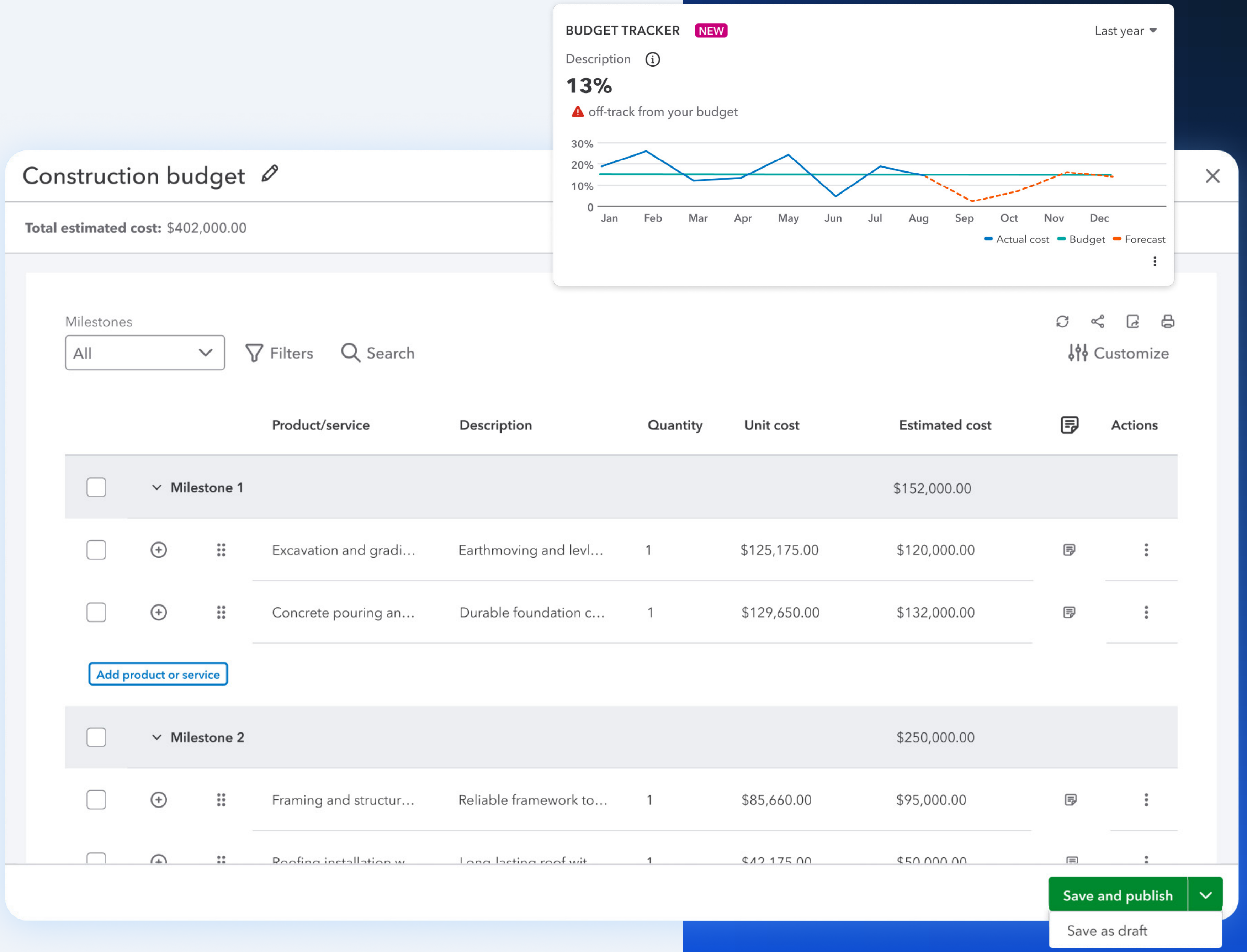
Enriched project budgeting

What

Draft, lock, and track updates to your budgets as part of your construction project management and approvals workflows. Use budget versioning and auditing to see how estimated costs have changed over the course of a project and different drafts of your budget. Link estimates to your budget to see what you planned to spend on a project, how much you spent, and the impacts of the difference on profitability. Monitor project finances with the new Budget tracker widget, and receive immediate notification when the costs of a project exceed the allocated amount so you can take action right away. Check the new Projects by budget widget to identify and address potential overruns.

Why

Proactively identify potential savings and risks and help minimize financial losses and project delays with more timely insight on your cost drivers. Get a deeper understanding of how changes in spending have impacted a project's profitability. Help minimize budget overruns with a clear and immediate view of any projects with high burn rates.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

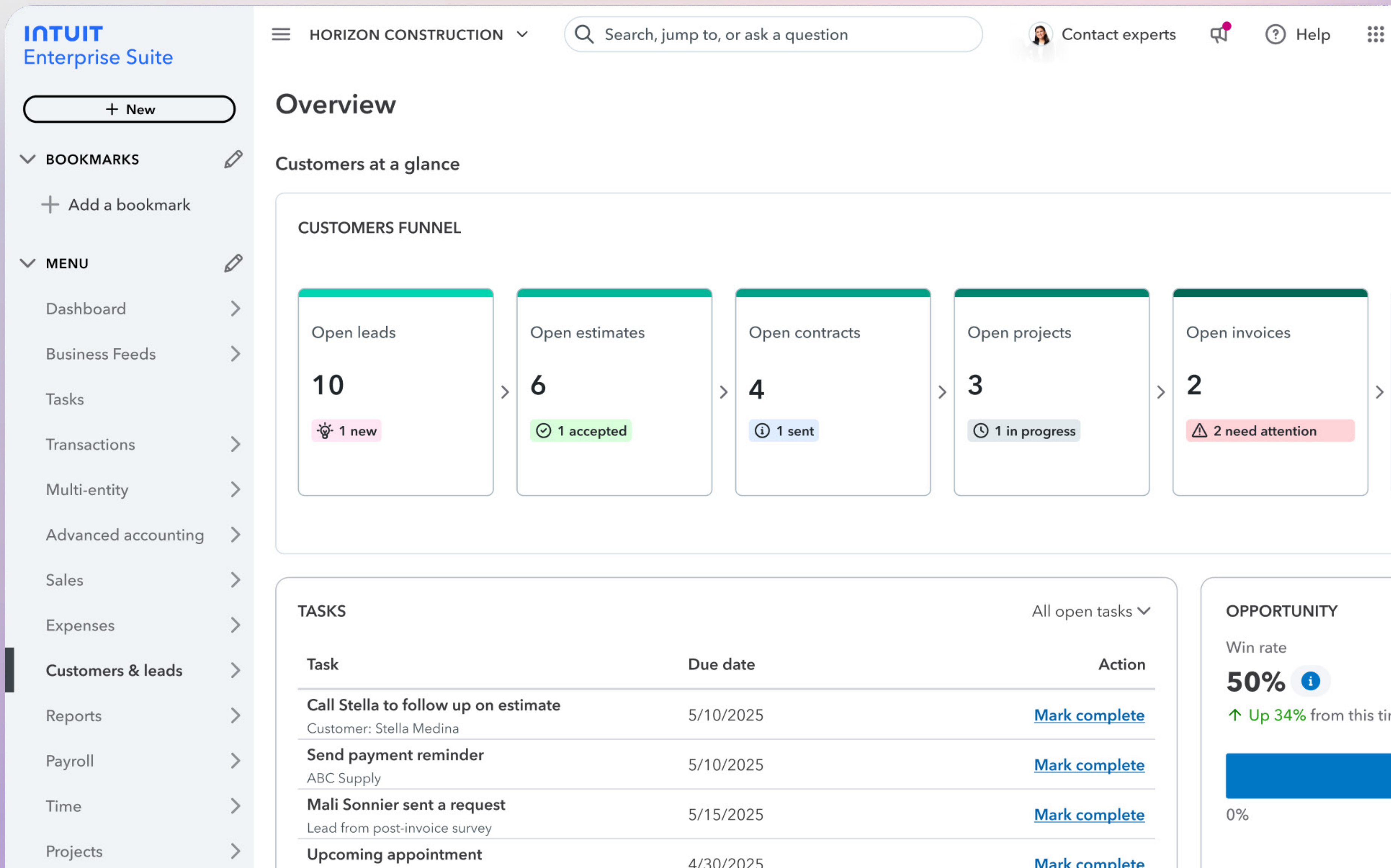
Customer management

Customer hub

Product performance updates

Customer management

Tools to build the customer relationships that are instrumental for business growth



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Customer hub

Product performance updates

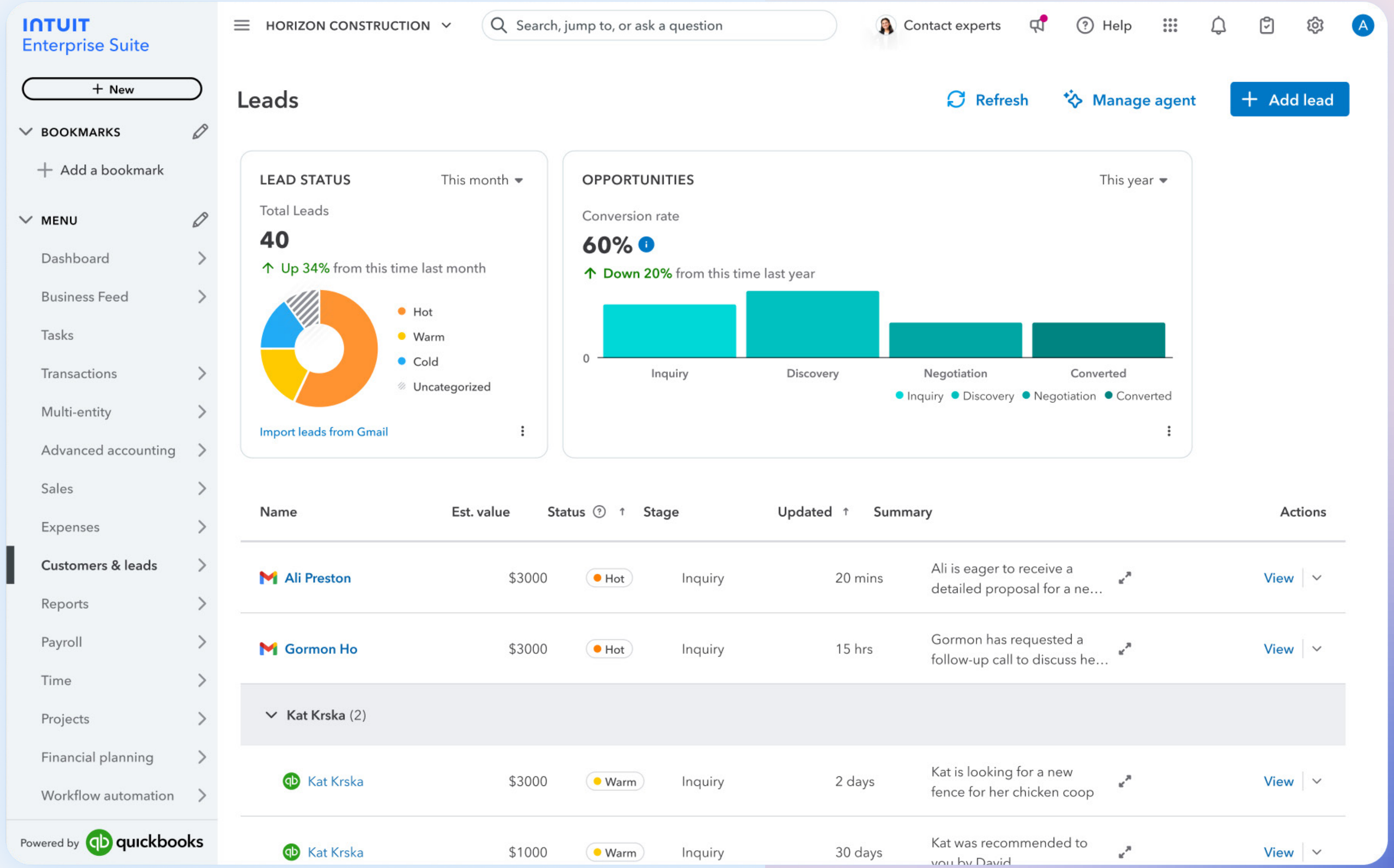
Customer hub

What

Grow and manage your customer relationships from one centralized place in Intuit Enterprise Suite. Organize notes and assign to-dos for customers, and use custom fields for insights specific to your business. Capture referrals and feedback from customers, and send contracts for e-signature.

Why

Efficiently manage sales opportunities and help accelerate revenue growth from one place rather than relying on disparate platforms. Streamline customer interactions and strengthen relationships with tools to capture referrals, testimonials, feedback, and work requests.

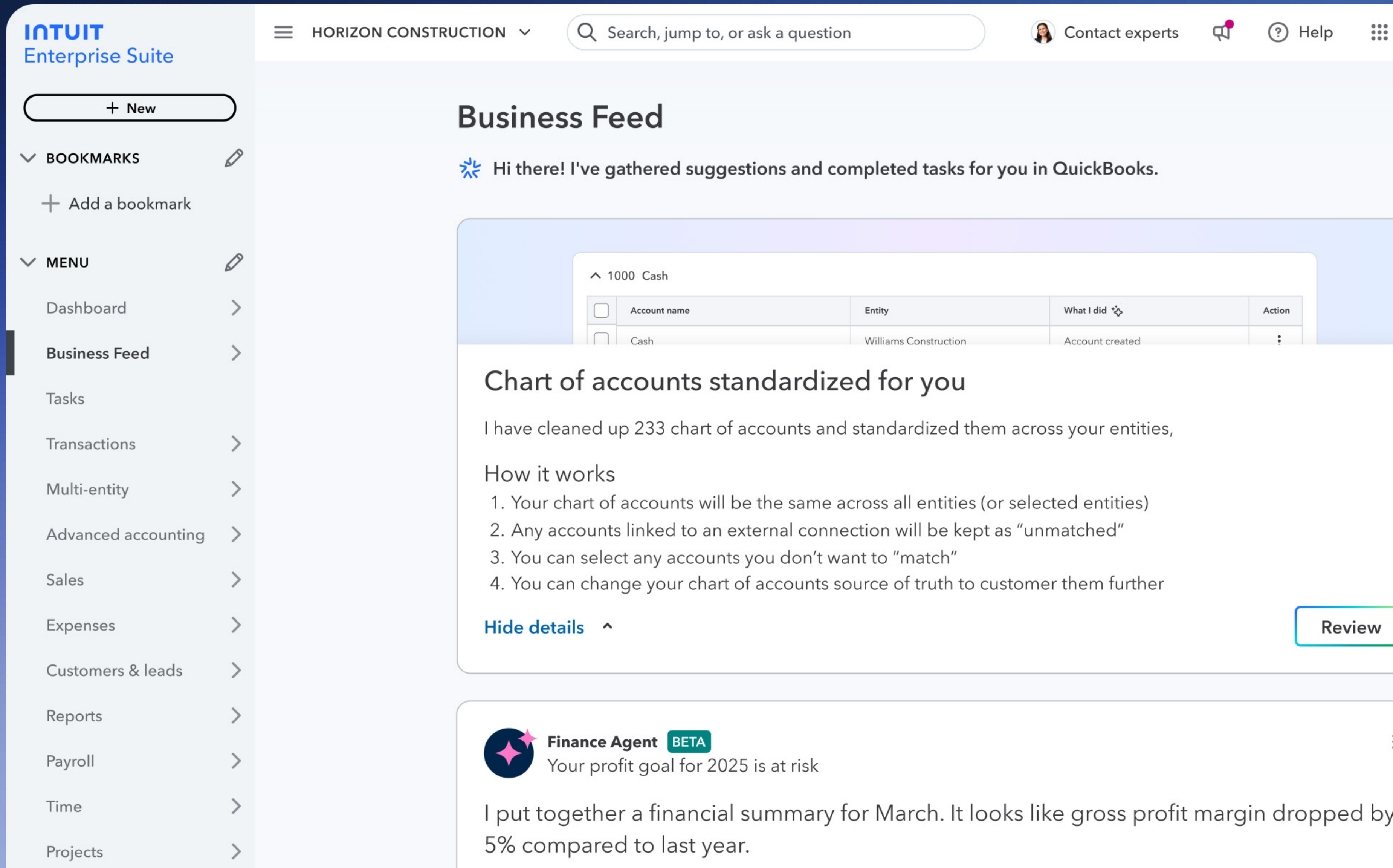


INTUIT
Enterprise Suite

Introduction
AI agents
Multi-entity financial management
Business intelligence
Payroll
Projects
Customer management
Product performance updates >
Global search
Platform performance enhancements

Product performance updates

Enhancements that help boost overall productivity levels across various teams and operations



INTUIT
Enterprise Suite

Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Global search

Platform performance enhancements

INTUIT
Enterprise Suite

Product performance updates

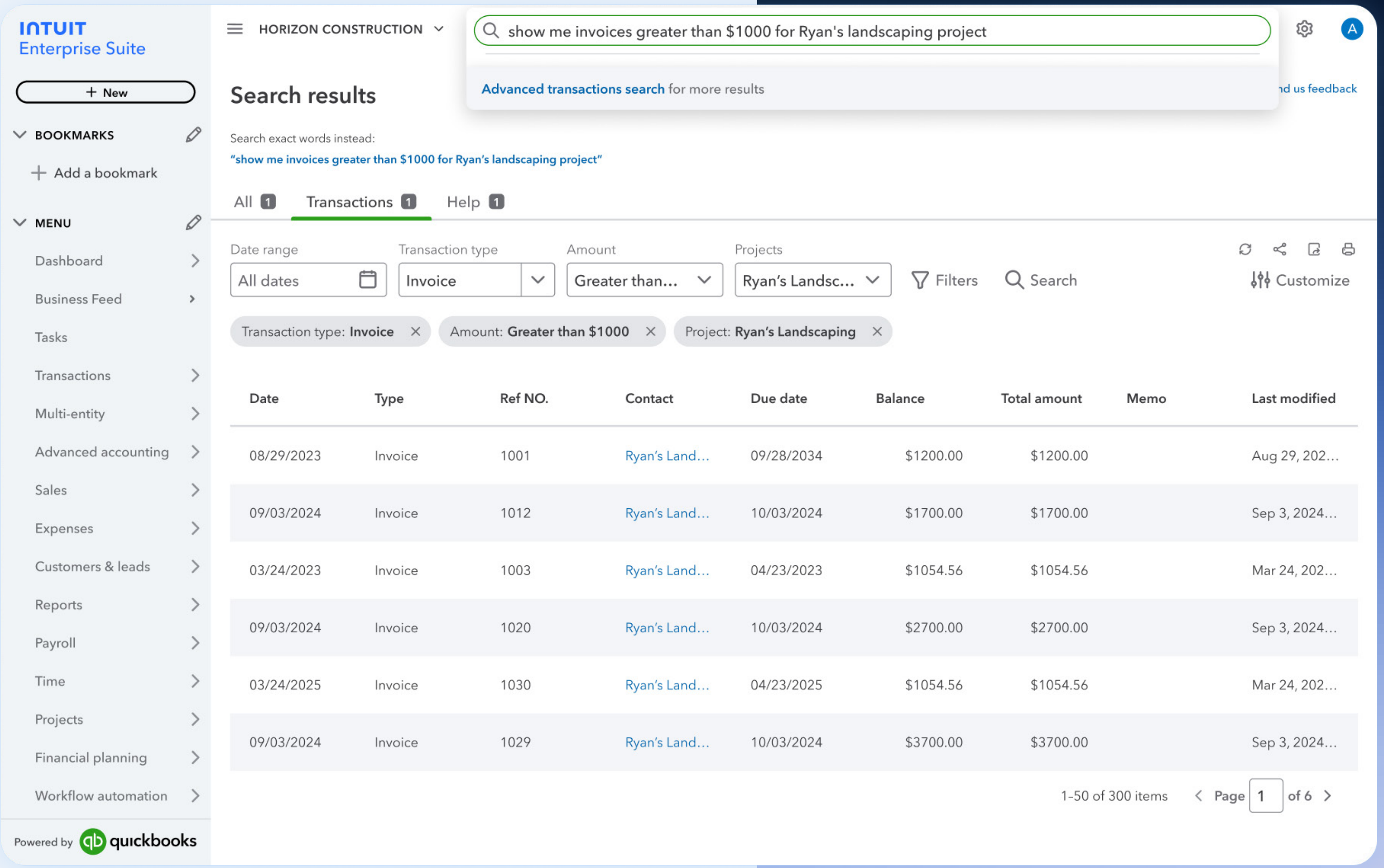
Global search

What

Intuit Enterprise Suite features a new global search experience that allows for a natural search using everyday language rather than precise keywords. Faster and more powerful than previous search capabilities, the new search experience delivers a full page of search results with integrated and searchable features, reports, and help center information. It also includes advanced filtering capabilities—like filtering by dimensions—and the ability to directly type filter criteria in the search bar.

Why

Find the information you need across your entities faster and easier, so you can run your business with more confidence and less work.



Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates

Global search

Platform performance enhancements

Platform performance enhancements

What

Intuit Enterprise Suite now offers a more responsive experience for businesses with a larger volume of transactions or multiple entities. New performance enhancements include optimized page loading, improved job processing speeds, and improved performance for larger transaction volumes. These enhancements allow businesses to handle increased workloads and manage large data sets without impacts on performance.

Why

Improve business scalability, access data faster, and boost productivity across your teams and operations with Intuit Enterprise Suite's latest performance enhancements.

Introduction

AI agents

Multi-entity financial management

Business intelligence

Payroll

Projects

Customer management

Product performance updates