Intuit Enterprise Suite

Product release overview

Winter 2026

What's new in Intuit Enterprise Suite

With this February product release, Intuit Enterprise Suite introduces new multi-entity capabilities and reports, workflow automation enhancements, and refined AI experiences to optimize your business processes. Also available is a new set of capabilities designed to help construction businesses manage their entire project life cycle from bid to project close. These capabilities are currently in open beta and available to all Intuit Enterprise Suite customers at no additional cost, but this is subject to change at Intuit's discretion. Other areas of innovation include new features for managing inventory and sales orders, improvements to our suite of business intelligence tools and dimensions, and new features to help you manage your workforce.

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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.

Multi-entity financial management

Further streamline cross-entity visibility with additional consolidated reports.

New consolidated reports

MULTI-ENTITY FINANCIAL MANAGEMENT

New consolidated reports

What

You can now access 5 additional consolidated reports in **Consolidated view**:

- Invoice list
- Transaction list by date
- Transaction detail by account
- Deposit detail
- Check detail

Why

Get additional visibility on cross-entity financial data without having to switch between entities.

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.

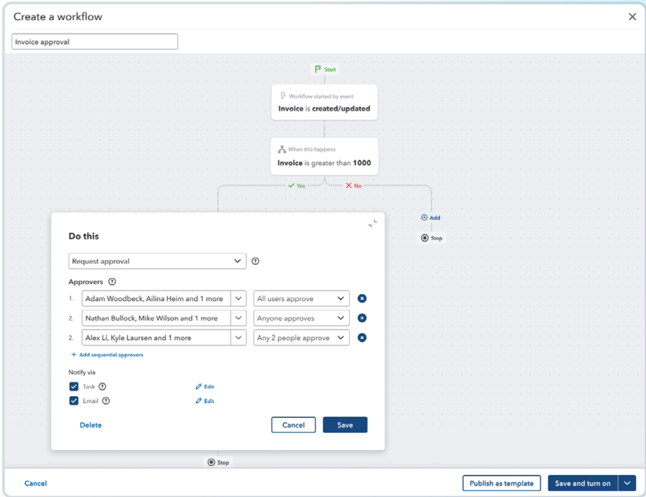
WORKFLOW AUTOMATION ENHANCEMENTS

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.

WORKFLOW AUTOMATION ENHANCEMENTS

Detailed audit trails

What

Transaction forms approved through your approval workflows, such as invoices and purchase orders, now include more detailed approval audit trails. Regardless of your approval set up, you'll have visibility and details for all approval steps, the names of all approvers, their approval statuses, timestamps, and which approvers met the approval criteria.

Why

Keep your business audit-ready with a single, detailed source of truth that helps reduce risk of transaction fraud. Minimize back-and-forth to help your team move faster and ensure every dollar spent is visible, authorized, and aligned with your growth strategy.

WORKFLOW AUTOMATION ENHANCEMENTS

Dimensions on workflow automation

What

Set conditions in your workflows using dimensions. Create approval processes and reminders based on your unique dimensions, such as region or department, to streamline your operations—just as you would with classes and custom fields.

Why

This addition helps you set up automations that match your business structure and financial reporting requirements, which makes approvals, reminders, and tasks more efficient.

Intuit AI enhancements

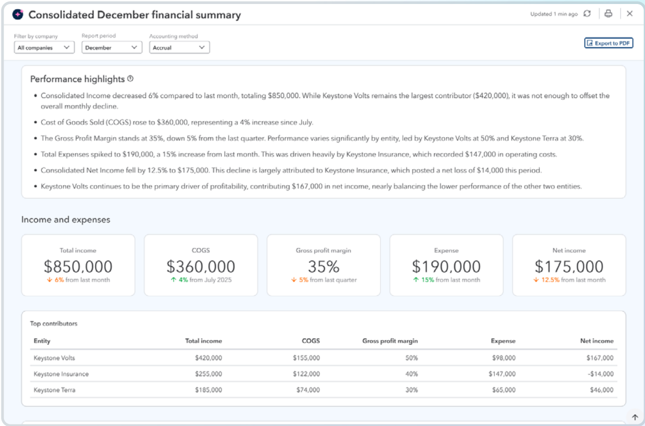
Enhanced automation helps you maintain control over tasks to be done while proactively handling routine financial tasks and unlocking critical insights—giving you time back to focus on what's important.

INTUIT AI ENHANCEMENTS

Finance AI

What

Finance AI now includes greater customization and multi-entity capabilities. You can customize your reports by removing KPIs from the monthly summary and deleting recommendations that aren't relevant to your business. Add the KPIs back any time to restore visibility.



Multi-entity businesses can now view financial summaries and recommendations at the consolidated business level and then drill down into individual entities.

Why

Finance AI gives you a clear and timely view of your company's financial performance without extra manual work. Focus on what matters most to you and your business by customizing your monthly performance summary and recommendations.

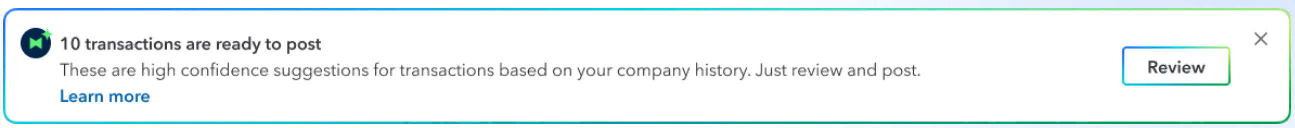
Simplify consolidating insights for your multi-entity organization—in less time. With a parent-level view of performance that allows you to drill down into individual entities as needed, Finance AI helps you keep your eye on the big picture without losing sight of the details.

INTUIT AI ENHANCEMENTS

Accounting AI

What

Accounting AI now helps you process a higher transaction volume with less manual effort. The AI scans and analyzes incoming bank feed transactions, matches transaction data like vendors and categories, and groups matches for your review. Once the AI finds a batch of strong matches, you can review and post them all at once.



Why

Review and post transactions more efficiently and grow your business without sacrificing accuracy or control.

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

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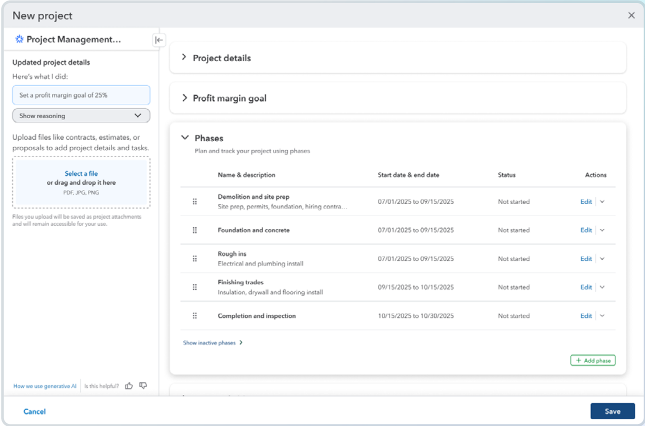
INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Project phases

What

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



Why

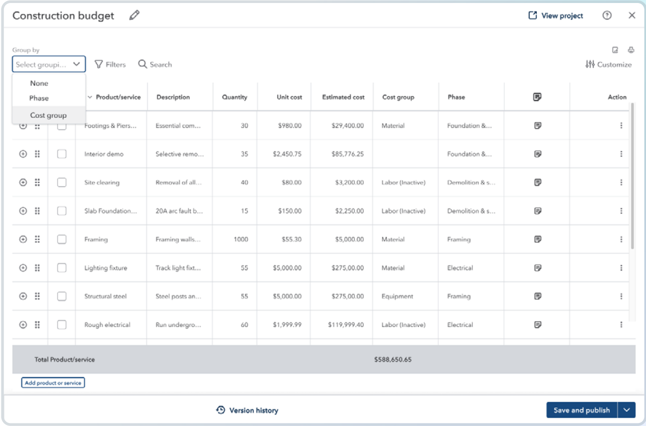
Stay on top of cash flow, profitability, and effective project management in one place, by planning and tracking your budget and progress against project phases without leaving Intuit Enterprise Suite.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Cost groups

What

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



Why

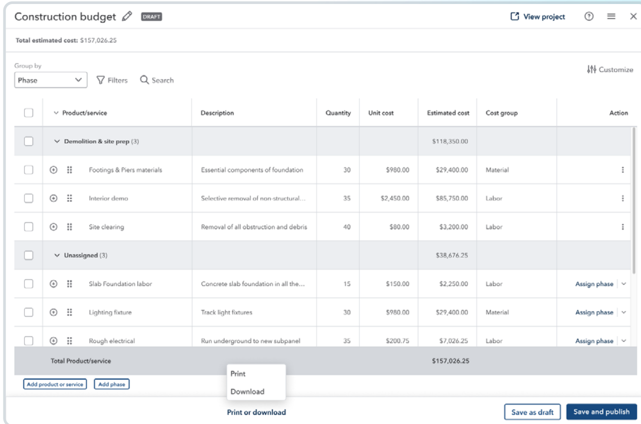
New cost groups are an effective way to plan and track project costs for better job costing and project profitability tracking. Get the analytics and details you need in less time, without manual spreadsheet workarounds.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Project budgets enhancements

What

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



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

Why

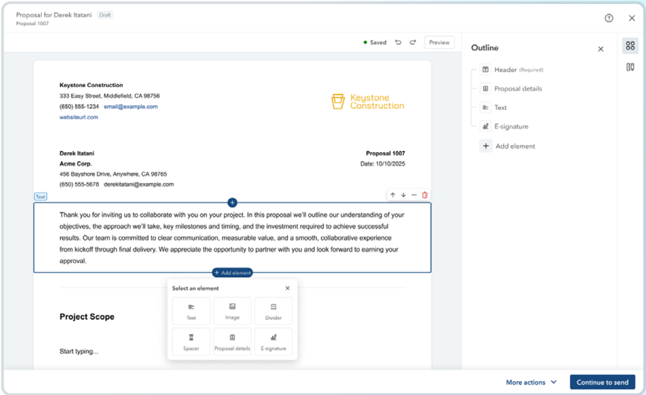
Construction teams get more opportunity to proactively control costs, keep projects on track, and protect margins. No more time wasted manually setting up budgets, working in spreadsheets, and reacting to overruns after it's too late. Simplify internal collaboration and performance review over time with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

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Proposals

What

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



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

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Why

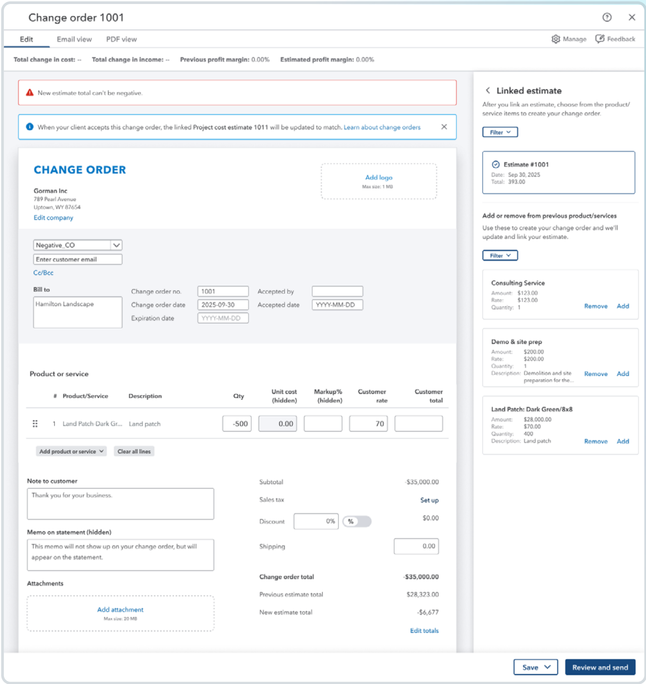
Winning bids is the first step to growing your business. These updates help you deliver professional client communications and smoother internal processes for better overall client experience.

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

Negative change orders

What

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



This enhancement allows you to:

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

Why

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

INTUIT ENTERPRISE SUITE FOR CONSTRUCTION (BETA)

AIA style invoicing

What

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

Why

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

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.

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.

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.

BUSINESS INTELLIGENCE

Improved modern report view

What

The enhanced modern view is now the standard for all reports. This new experience takes the best of classic view and combines it with a more intuitive user experience. Enhanced modern reports offer:

- Automatic refresh: Reports update automatically to reflect the latest transaction changes.
- Consistent customizations: Filters, date ranges, and display settings stay intact when drilling into details and returning to the report.
- Enhanced details: Drill down into aging bucket totals and get a detailed view for zero-balance accounts that contain underlying transactions.
- Ordering that aligns with GAAP reporting standards: Financial reports display accounts in standard accounting order.
- Cleaner financial views: Inactive accounts are hidden with the option to show them as needed.
- Zero-balance visibility: Access transaction details for accounts with zero balances.

Why

Get quicker access to the insights you need with reporting that's more streamlined with more accessible customization.

BUSINESS INTELLIGENCE

Calculated fields

What

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

Why

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

BUSINESS INTELLIGENCE

Management reports

What

Management reports have new and enhanced functionality across both company-level reports and multi-entity reports in **Consolidated view**.

This lets you:

- Share management reports via email as an attached PDF directly from Intuit Enterprise Suite
- Add KPI widgets and charts to management reports within **Consolidated view**
- Include custom KPIs in management reports as chart widgets
- Use smart chips such as **this period** or **last period** to automatically update dates and figures throughout your report.
- Design reports with new branding and formatting options
- Delegate management reports access within **Consolidated view** to non-admin users

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Why

Simplify customization and sharing of Management reports that offer more KPIs and custom metrics to fit your business's goals and needs.

BUSINESS INTELLIGENCE

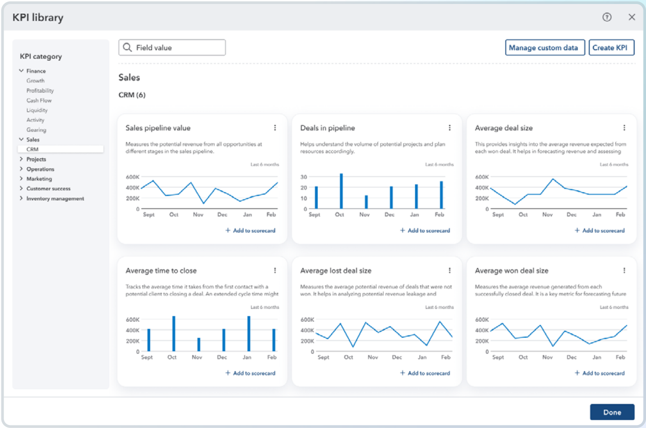
More app integrations

What

New app integrations allow you to connect more third-party tools and combine this data directly with your accounting data in Intuit Enterprise Suite.

New advanced app integrations include:

- CRM: HubSpot, Salesforce
- Workforce: Gusto, Hubstaff, Clockify



Why

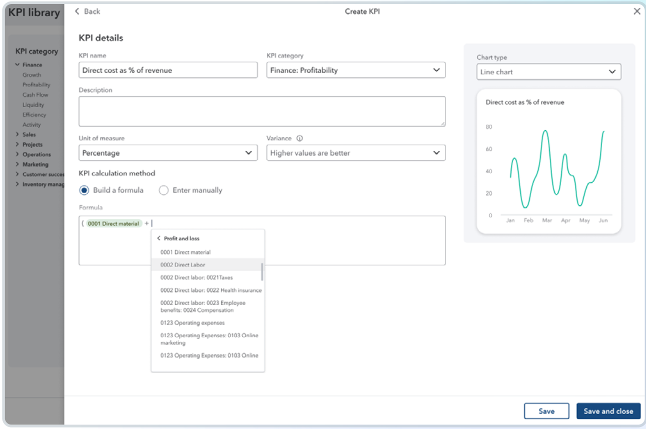
In one place, analyze key business and financial metrics from multiple systems and see how everything fits together without exporting data or stitching it together in spreadsheets. This provides more visibility into how and why your finances are affected by your business decisions and tactics. With more holistic business insights, you can make more informed decisions with greater confidence.

BUSINESS INTELLIGENCE

KPIs and dashboards

What

KPIs and dashboards have expanded to give you more control over how you define and track performance–and more visibility into understanding your business drivers.



Enhancements to the custom KPI builder now allow you to:

- Use accounts from your CoA as variables to track metrics that are specific to your business and industry
- Specify a time period for each metric within the builder
- Pull in variables from third-party data with the new advanced app integrations

In addition, custom KPIs and dashboards now offer more flexibility:

- Add custom KPIs to management reports and dashboards
- Create KPIs directly in your dashboards
- Pick from new, pre-built dashboards to track sales performance (CRM), payroll, and time tracking
- Compare period-over-period changes within your dashboard charts

Why

Measure what matters to your business using custom KPIs and dashboards that flex to fit your needs, not the other way around. With custom KPIs and dashboards, you can shape exactly how you track performance and identify drivers with ease and confidence.

Dimension enhancements

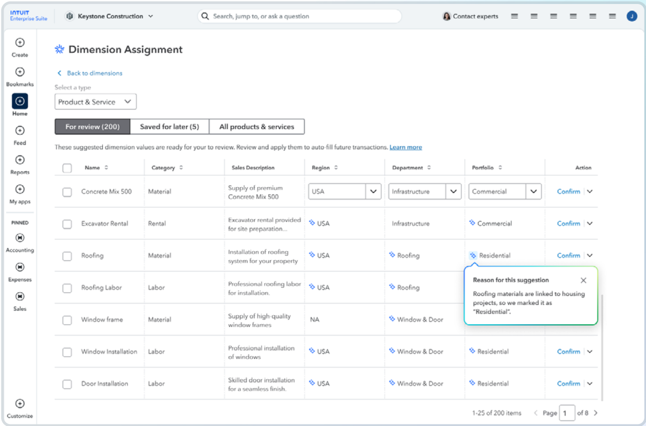
New updates make setting up and managing dimensions easier with simplified dimension assignments.

DIMENSION ENHANCEMENTS

Dimension assignment

What

Enhanced dimension capabilities now allow you to:



- Access dimension assignment from the **Fixed assets** and **Business feed** pages, in addition to the **Dimensions hub**
- Move transactions to the **save it for later** list when you're not ready to assign dimension values
- Assign dimensions in bulk to all items

Why

Assign dimensions faster and with more flexibility, to help streamline your workflow with efficiency and accuracy

Workforce management

Enhanced features help you simplify work assignments, manage paychecks, and get unified visibility of all W-2 and multi-entity employee information.

WORKFORCE MANAGEMENT

Garnishments

What

QuickBooks Payroll customers can now track and manage the garnishment process with more context and efficiency.

Added garnishment capabilities include:

- Associating each garnishment with its agency, to track accrued amounts downstream
- Viewing and tracking garnishment liabilities by employee, including the agency to which each garnishment is due
- Marking and tracking paid garnishments
- Automatically syncing paid garnishments to your books

Why

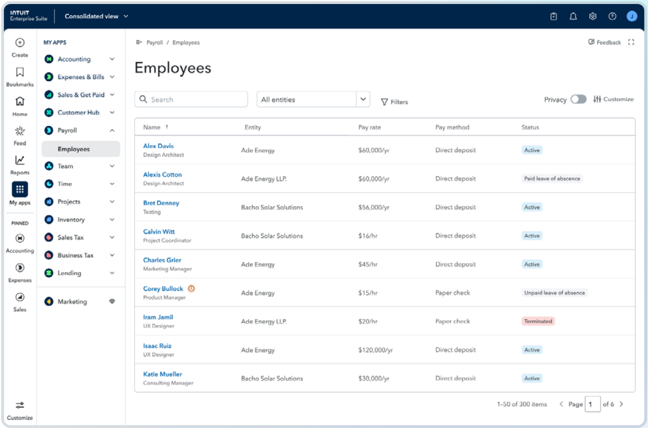
Help maintain garnishment compliance efficiently by handling the full lifecycle in one place, with richer context and automated bookkeeping. Quickly identify the status of each garnishment and help ensure compliance for transactions that span multiple pay periods. Keep your books up to date without spending extra time on manual data entry.

WORKFORCE MANAGEMENT

Consolidated employee list

What

Intuit Enterprise Suite customers using QuickBooks Payroll Elite can view a consolidated list of W-2 employees across linked entities. Employees who work across multiple entities are shown in a separate row for each entity, along with their job title, pay rate, pay method, and employment status. From **Employees**, you can also navigate to a specific entity to manage the employee's profile and payroll.



Why

Find employee details without switching between entities. Streamline workforce management and eliminate repetitive tasks across accounts, with unified visibility of all W-2 and multi-entity employee information.

WORKFORCE MANAGEMENT

Assignments in QuickBooks Time

What

Payroll Premium and Elite customers can access a simplified, modernized **Assignments** experience directly inside Intuit Enterprise Suite. This new experience eliminates the need to switch back to Time Classic to manage assignments. Admin users can now assign customers or projects to workers, set standard and custom field values for workers and customers, and control which fields apply to customers or projects. This ensures workers only see the relevant fields and values they need for accurate time tracking.

Why

Gain greater control over how employees track their time—while reducing confusion, errors, and rework—by managing all assignments in one place. Get cleaner time entries, fewer admin corrections, more accurate timesheets, and fewer time entry errors by offering the right fields and values from the start. Improve overall payroll and job-costing accuracy with a streamlined assignment workflow that helps you avoid manual review and corrections.

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Enterprise Suite

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