

Live Webinar Series

Discussing QuickBooks & Apps
that work with QuickBooks

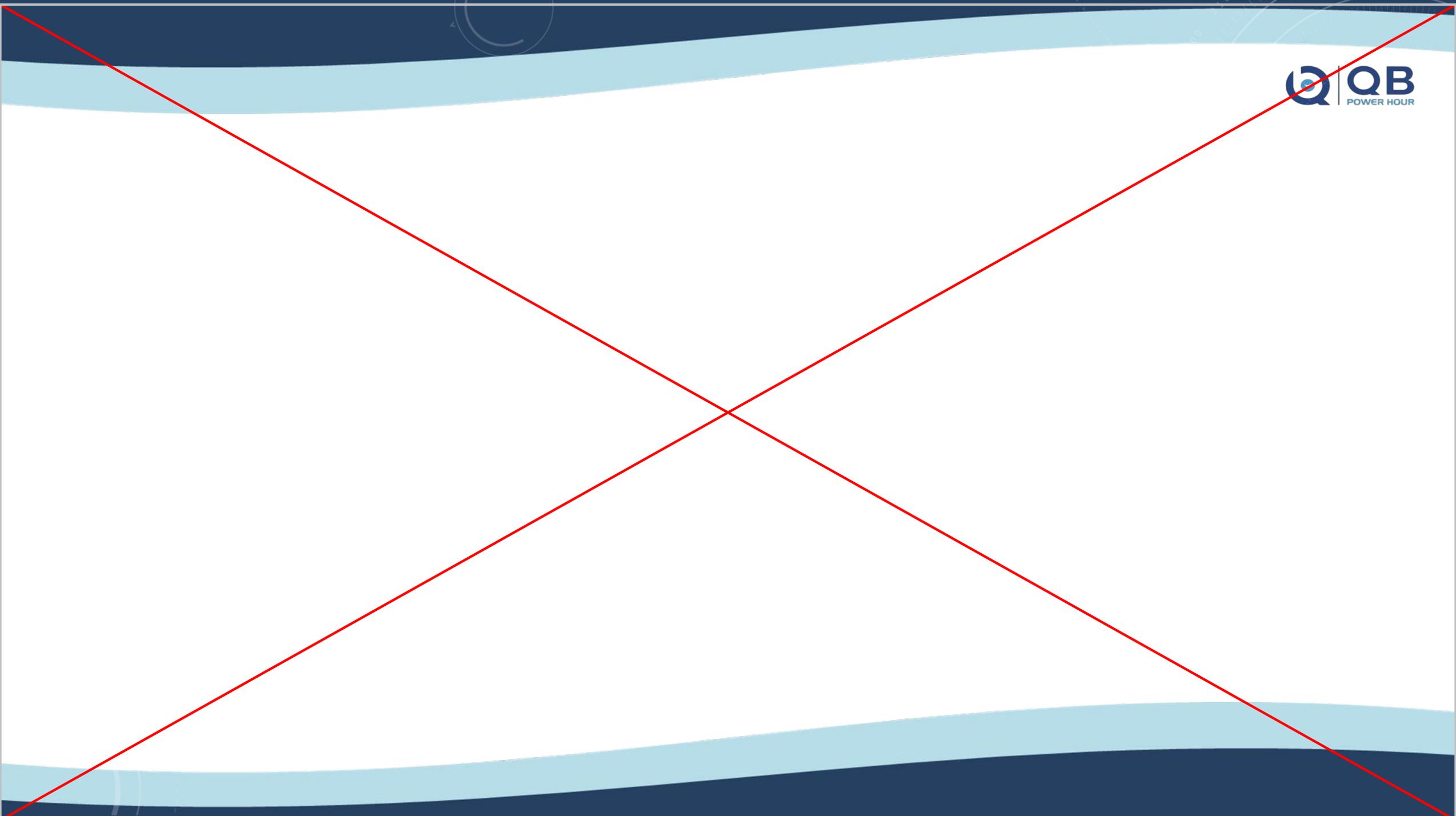


Sharrin



Dan

Every Other Tuesday
9am PT | 12pm ET



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Intuit Accountant Suite is the New QBOA

Changes to the Platform and the

ProAdvisor Program



POWER HOUR

Tuesday 1/20
9am PT | 12pm ET



Sharrin



Dan

Dan DeLong

- **Owner** - Danwidth and schoolofbookkeeping.com[™]
- Worked at **Intuit** for nearly 18 Years
- **Co-Host** - QB Power Hour
- **Co-Host** Workshop Wednesdays
- **Feature Deep Dive Guest Host** - The Unofficial QuickBooks Accountant Podcast
- **Admin Facebook Group** ~17,800 members
<http://facebook.com/groups/qbpowerhour>
- **Tech Editor** of **QBO for Dummies** (since 5th edition - 2019-2025) and **QuickBooks All-In-One**
- **Top 10 ProAdvisor 2021** - Social Media



Sharrin Fuller



- **Founder of Glass Wallet Ventures** where accounting pros go to stop doing it all and start leading
- **Built, scaled, and sold multiple 7-figure firms** using the exact methods she now teaches
- **Creator of the Clone & Conquer Method™** a no-fluff system for building a team and backend that runs without you
- **Host of *Start 2 Scaling: The \$1 Million Journey*** podcast and creator of the Remote Team Roadmap™
- **Top 100 ProAdvisor for three consecutive years** and 2025's Top QuickBooks Educator
- **Runs 3 companies in just 3 days a week** and helps firm owners do the same with strategic advisory, courses, and her Community Hub

QB Power Hour Webinars Details

Every Other Tuesday at 12:00 ET

Upcoming Webinars:

- 2026 QBPH Webinars are no Longer eligible for CPE Credit through Earmark App: Historical Webinars are still eligible for 1 year ([Channel on Earmark](#))

Show Topics:

- QuickBooks tips, what's new, troubleshooting, etc.
- Marketing, pricing, apps and more
- Topics to help accounting professionals succeed in their business

Where to Find our Resources:

- PDF of slides
- Past Recordings and Podcast
- and other Resources

www.qbpowerhour.com/resources



Intuit News:

Discounts on Desktop - Decoding Intuit Emails

IAS is the New QBOA

- ProAdvisor Program Changes
- Versions of Intuit Accountant Suite (IAS)
- Books Close
- Client Insights
- Other IAS Features



Polling Questions

What version of QuickBooks do you use to support your clients?

- QB Online Only
- QB Desktop Only
- Both
- Other Accounting/Ledger Software
- N/A



method

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Intuit News: Discounts on Desktop - Decoding Intuit Emails

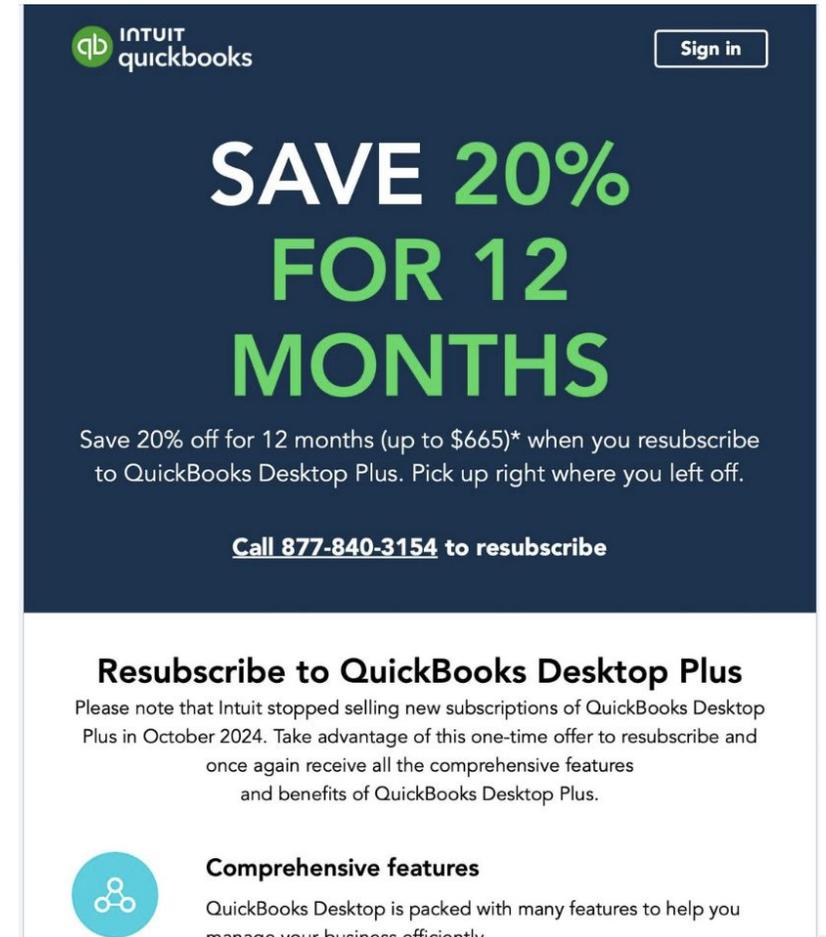


Another confusing email

What's Happening?

- Desktop Pricing increasing Feb 1
- Email going being sent offering discount on renewal
- Discount negates increase
- Confusion on legitimacy

[Insightful Accountant's Blog on Pricing Increases](#)



The screenshot shows an email from Intuit QuickBooks. At the top left is the 'qb INTUIT quickbooks' logo, and at the top right is a 'Sign in' button. The main body of the email features a dark blue background with the text 'SAVE 20% FOR 12 MONTHS' in large, bold, green letters. Below this, it says 'Save 20% off for 12 months (up to \$665)* when you resubscribe to QuickBooks Desktop Plus. Pick up right where you left off.' and 'Call 877-840-3154 to resubscribe'. The bottom section has a white background with the heading 'Resubscribe to QuickBooks Desktop Plus' and a paragraph: 'Please note that Intuit stopped selling new subscriptions of QuickBooks Desktop Plus in October 2024. Take advantage of this one-time offer to resubscribe and once again receive all the comprehensive features and benefits of QuickBooks Desktop Plus.' Below this is a circular icon with a network symbol and the heading 'Comprehensive features', followed by the text: 'QuickBooks Desktop is packed with many features to help you manage your business efficiently.'

Detecting a Scam

Best Practices to Detect a Scam

- Review the From Address
- Look at the CTA
- Hover Over the Links
- Inspect for Typos
- Check Out Intuit Security Site



ProAdvisor Program Changes

Re-reimagined ProAdvisor Program (Again)

Announcements scheduled May 2026

- More on Advisory
- ProAdvisor Academy
- May 2026 Announcements
- “Global” Partnership Program



Firms that enroll clients to our platform with Intuit Accountant Suite, drive services adoption, complete workforce certifications, and participate in our global partnership program will see the most benefit.

- JAN 2026**
Testing and feedback
- MAY 2026**
Tiered requirements announced
- DEC 2026**
Retire QBOA
- JAN 2027**
Launch new program

Versions of Intuit Accountant Suite (IAS)

Intuit Accountant Suite - A Tale of Two Versions

Opt into the New IAS

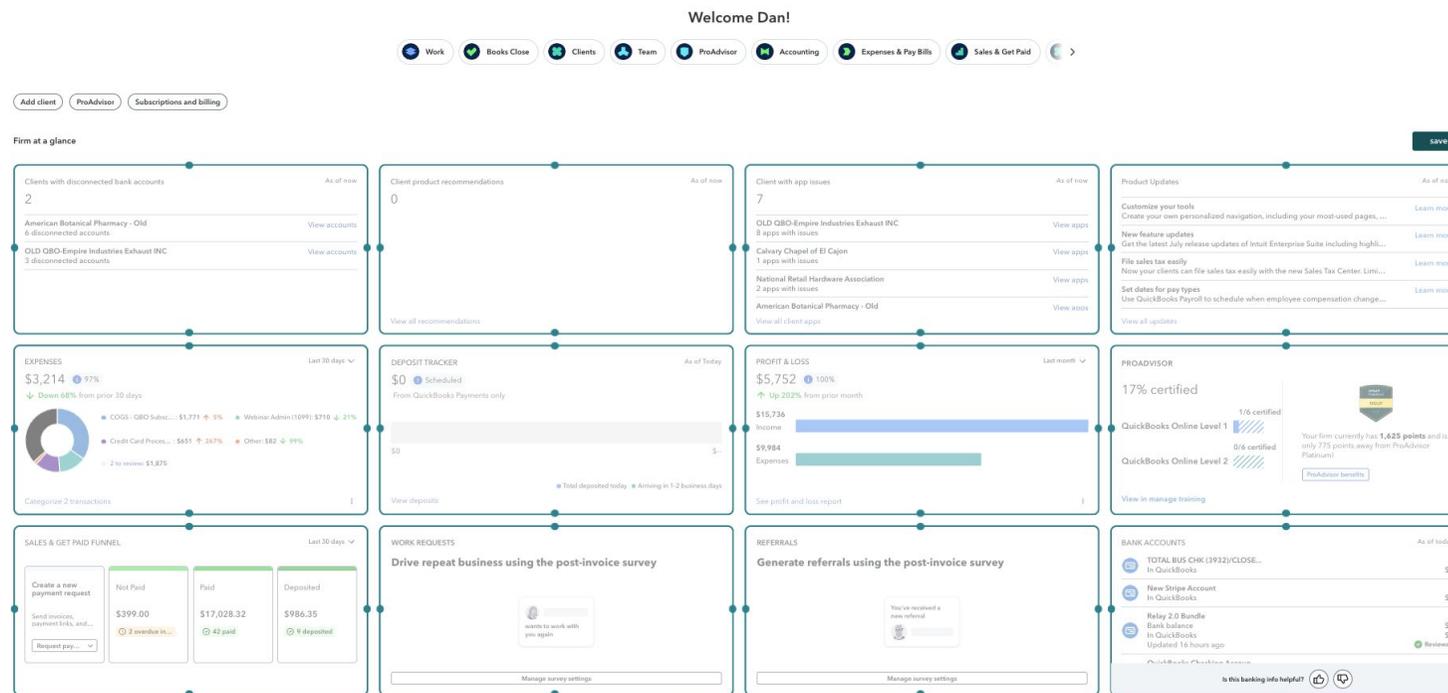
- Core
- Accelerate
- Both Free (for Now)
 - Core (Without Books Close) Free
 - Books Close
 - Accelerate
- Can Toggle Versions
- Opt Out (until you can't)

CURRENT PLAN	BETA
<p>Intuit Accountant Suite Core All your client files in one place</p> <p>Free</p> <p>Current Plan</p> <p>QuickBooks Online Accountant functionality, and:</p> <ul style="list-style-type: none"> ✓ Centralized operations* ✓ Customizable home ✓ Customer Hub BETA ✓ Manager Training dashboard COMING SOON ✓ Books Close** BETA 	<p>Intuit Accountant Suite Accelerate Grow client relationships at scale</p> <p>\$0⁰⁰ /mo</p> <p>Upgrade to Accelerate</p> <p>Intuit Accountant Suite Core functionality, and:</p> <ul style="list-style-type: none"> ✓ AI-powered anomaly detection BETA ✓ Client Insights BETA ✓ Tax, Payroll & Bill Pay service delivery* COMING SOON ✓ AI-powered chat* COMING SOON ✓ Advanced AI agents* COMING SOON ✓ Sub-orgs* COMING SOON ✓ Dedicated support via automatic Gold status in the ProAdvisor Program.*** COMING SOON

Getting Around in IAS

Redesigned UI

- Consistent with QBO
 - Customizable Left Side Menu
 - Customizable My Menu
- Dashboard with Customizable Widgets

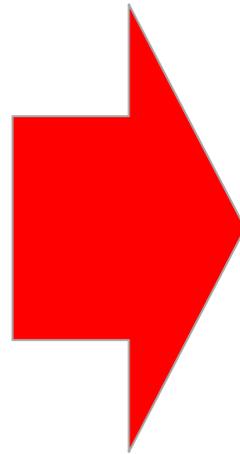


[Latest Changes in the PAP](#)

Where'd it go?

QBOA

- Your Practice/Your Books
- Client List Homepage
- Team
- Work
- ProAdvisor
- Workflows
- Search Icon

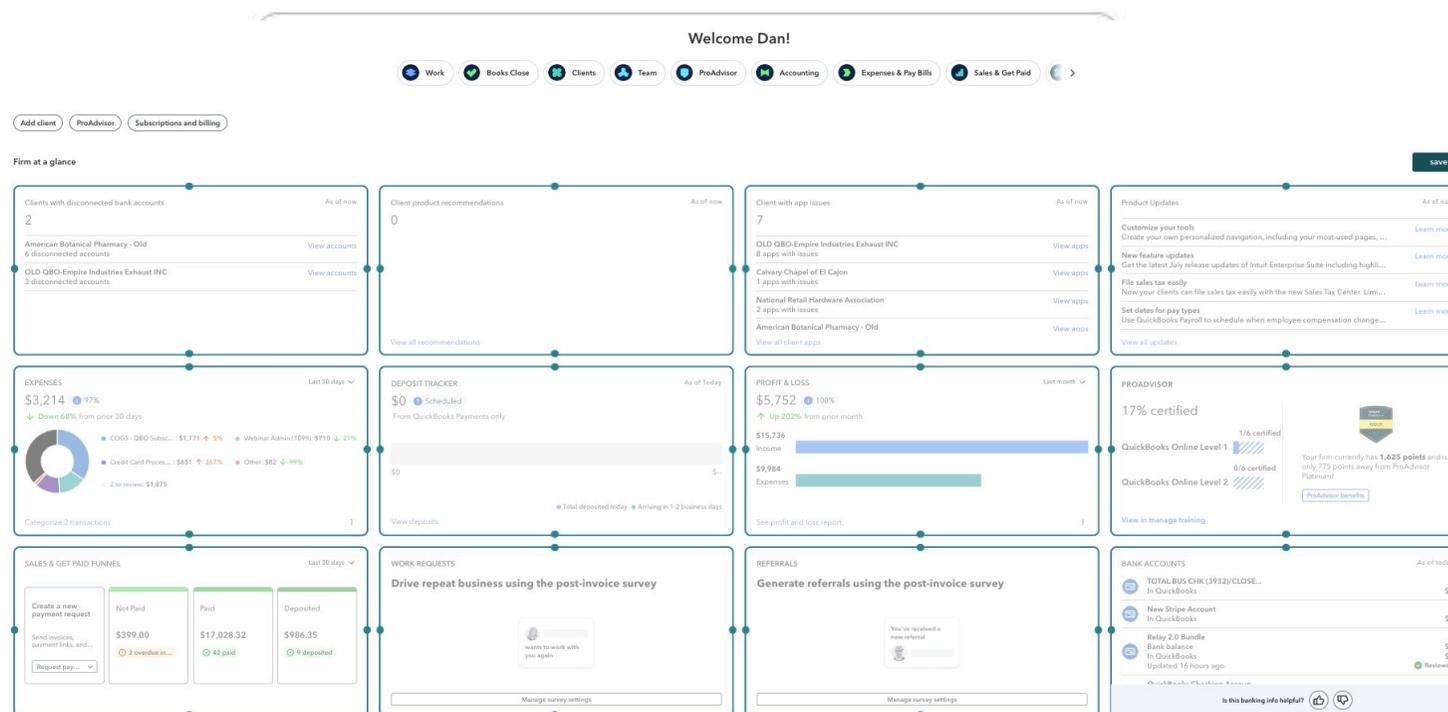


IAS

- Service Delivery/Firm Operations
- Firm Ops (Clients and Client Invites)
- Firm Ops (Users/Roles/Certifications)
- Service Delivery (Projects/Tasks)
- Firm Ops (Benefits/Training)
- Lighting Bolt (Global Header)
- Search Field (Global Header)

Core Features

- Books Review (Beta)
- Team Training
- Customer Hub
- Client Widgets
 - Disconnected Bank Accounts
 - Integrated Apps Warnings
- Product Updates Widget
- QB Product Recommendations



Accelerate Features

All features of Core Plus:

- Client Insights
- AI Powered Anomaly Detection (Beta)
- 500 ProAdvisor Points (Gold Level)
- Future Features will show here first
 - Firm Capacity Planning
 - Sub Orgs

BETA

Intuit Accountant Suite Accelerate

Grow client relationships at scale

\$0⁰⁰ /mo

[Upgrade to Accelerate](#)

Intuit Accountant Suite Core functionality, and:

- ✓ AI-powered anomaly detection **BETA**
- ✓ Client Insights **BETA**
- ✓ Tax, Payroll & Bill Pay service delivery* **COMING SOON**
- ✓ AI-powered chat* **COMING SOON**
- ✓ Advanced AI agents* **COMING SOON**
- ✓ Sub-orgs* **COMING SOON**
- ✓ Dedicated support via automatic Gold status in the ProAdvisor Program.*** **COMING SOON**

Polling Question 2

Which version of IAS have you opted into?

- Core
- Accelerate
- I haven't Opted in yet
- I opted in then switched back
- N/A

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 Qbox

Books Close

Books Close

Advanced Books Review:

- Work on Closing Activities without leaving IAS
- Dashboard for all Clients
- Assign Clients to Team Members

Books Close overview BETA [Share feedback](#) Books close settings

[Onboard close client](#) [Create close](#)

Updated ↻

Client: ▼ Period: ▼ Assigned to: ▼ [Filters](#) [Customize](#)

Client	Period ↓	Due Date	Assignee	Status	Tasks Done	Action
National Retail Hardware Association	December 2025	01/15/2026	Dan DeLong	To do	0 of 50	Open ▼
Sail Sand Point	November 2025	12/15/2025	Dan DeLong	To do	0 of 36	Open ▼

[Latest Changes in the PAP](#)

Books Close Tools

Divided into Sections

- Pre Close
- Account Reconciliation
- Transaction Review
- Payee/Entity Review
- Additional Items
- Send Financials

Due date Status Completed tasks Assignee
01/15/2026  To do 0 of 50 Dan DeLong

> Pre-close (0/2)

> Account reconciliation (0/22)

> Transaction review (0/15)

> Payee/Entity review (0/4) - coming soon

> Final review (0/4)

> Additional items (0/2)

> Send financials (0/1)

Client Insights

Client Insights

High Level View of All Clients on Key Metrics

- Preset and Custom Views
- Stay in IAS
- Filters
 - Change Date
 - Client Custom Fields to Group Clients
 - Select Specific QB Subscriptions
 - Accountant Leads
- Sort and Reorder columns

[Client Insights Article](#)

Filters Search by client

Filter By

Date From To

Last month 12/01/2025 12/31/2025

Client custom field Value

Select... Select...

Add condition

Product

All

Lead

All

Clear All Apply

\$0.00

Client Insights

Client ↑	🕒 Total AR past due vs prev. period	🕒 Total AP past due vs prev. period	Disconnected banks	App issues as of today	Transaction Count vs prev. period	Actions
Abbett Avenue LLC	\$1,717.79 0%	\$0.00 -	1	0	0 -	Go to client reports
Al's Liquor Store Holdings Inc.	\$0.00 -	\$0.00 -	0	0	22 ↑ 214%	Go to client reports
Al's Liquor Store Holdings Inc. ESOP	\$0.00 -	\$0.00 -	0	0	2 ↑ 100%	Go to client reports
Al's Liquor Store Inc. DBA Frugal MacDoogal	\$0.00 -	-\$5,335.39 0%	0	0	1,001 ↑ 7%	Go to client reports
Alaska Sales Tax	\$93,609.16 0%	\$26,746.92 0%	0	0	0 -	Go to client reports
American Botanicals COA only	\$0.00 -	\$0.00 -	0	0	0 -	Go to client reports
ASL Conversion Eval - 2017	\$499,747.15 0%	\$48,081.62 0%	0	0	1 0%	Go to client reports
ASL Eval Employee Delete	\$499,747.15 0%	\$48,081.62 0%	0	0	1 0%	Go to client reports

[Client Insights Article](#)

Client Insight Views

Customizable Data Comparisons

- Default Views
 - P&L Data
 - Bookkeeping Data
 - Balance Sheet Data
- Custom Views

Overview Create new data view

Favorite views		
Name	Created	Actions
P&L data	12/11/2025, 4:56:08 PM	Open ▾
Bookkeeping data	12/11/2025, 4:56:08 PM	Open ▾
Balance sheet data	12/11/2025, 4:56:08 PM	Open ▾

All views		
Name	Created	Actions
Custom Dashboard	01/19/2026, 10:25:26 PM	Open ▾
P&L data	12/11/2025, 4:56:08 PM	Open ▾
Bookkeeping data	12/11/2025, 4:56:08 PM	Open ▾
Balance sheet data	12/11/2025, 4:56:08 PM	Open ▾

Client Insight Custom View

Select and reorder

Sort

Sort by

Disconnected banks

Ascending

Ascending

Descending

Any displayed column is sortable

Row

Rows per page

25

Rows Height

Compact

Alternate row color

Up to 100 Rows

Columns

Drag to change the order of columns

Some KPIs use AI to spot anomalies for clients with

- Client
- Revenue
- Cost of Goods Sold
- Gross profit
- Expenses
- Net income
- Gross Profit Margin
- Net Profit Margin
- Total AR past due
- Total AP past due
- AR balances
- AP balances
- Current Ratio
- Disconnected banks
- App issues
- Transaction Count
- Total bank balance
- Undeposited funds
- Uncategorized income
- Uncategorized expenses
- Uncategorized assets

Future IAS Features

Future IAS Roadmap

More Features

- Firm Capacity Planning
- Sub Orgs
- Tax, Payroll, Bill Pay Service Delivery
- AI Agents and Chat



Polling Question 3

Was this information useful?

- Yes
- No
- N/A

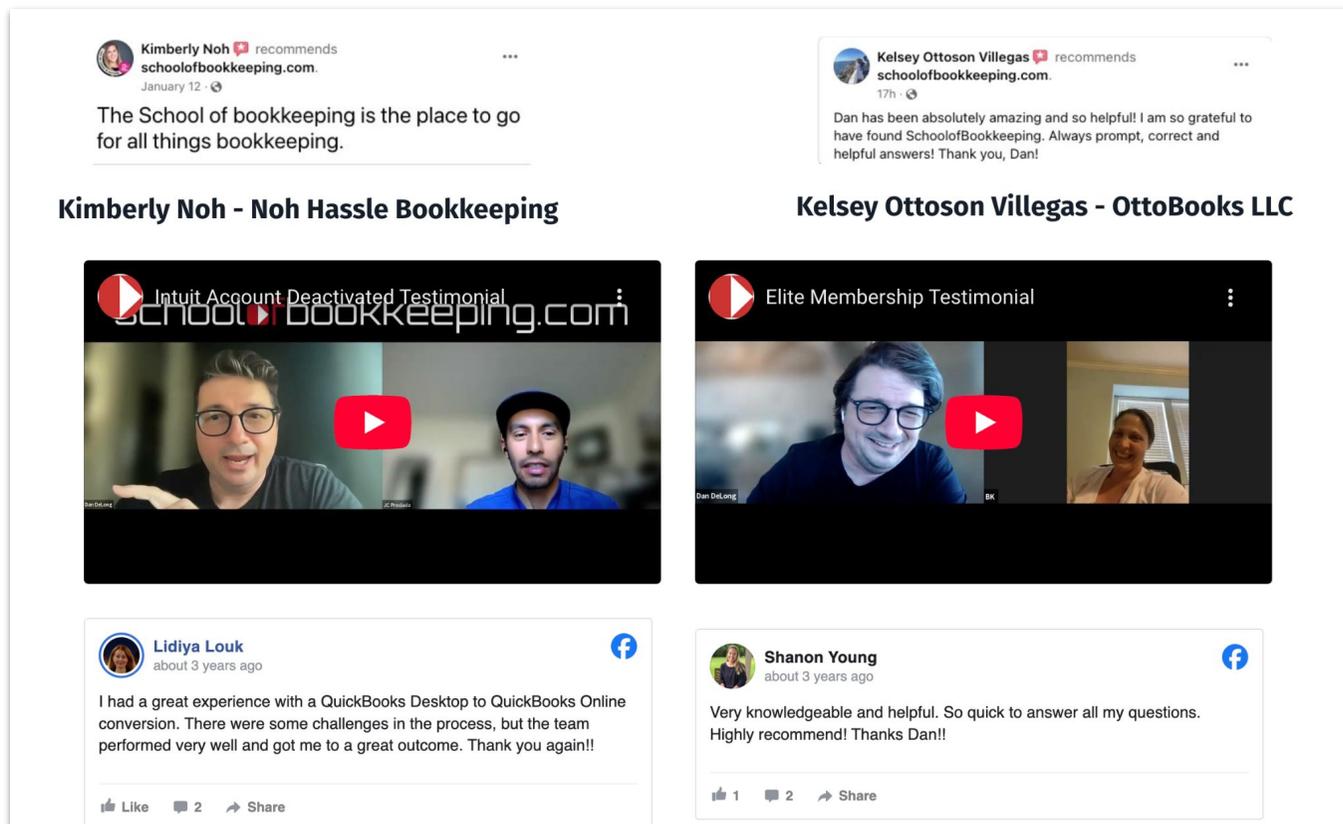
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 Avalara
Tax compliance done right

Quick Answers at schoolofbookkeeping.com

- Chat/Email Support
- Day/Monthly/Annual Options
- Bundle with QBO subscriptions

[Learn More](#)



The screenshot displays four social media testimonials arranged in a 2x2 grid. Each testimonial includes a profile picture, name, company, and a video player. The top-left testimonial is from Kimberly Noh, who recommends schoolofbookkeeping.com and states, "The School of bookkeeping is the place to go for all things bookkeeping." The top-right testimonial is from Kelsey Ottoson Villegas, who recommends schoolofbookkeeping.com and says, "Dan has been absolutely amazing and so helpful! I am so grateful to have found SchoolofBookkeeping. Always prompt, correct and helpful answers! Thank you, Dan!" The bottom-left testimonial is from Lidiya Louk, who shares her experience with a QuickBooks Desktop to QuickBooks Online conversion, praising the team's performance. The bottom-right testimonial is from Shanon Young, who describes the support as "Very knowledgeable and helpful" and highly recommends the service.

Kimberly Noh - Noh Hassle Bookkeeping

Kelsey Ottoson Villegas - OttoBooks LLC

Lidiya Louk
about 3 years ago

I had a great experience with a QuickBooks Desktop to QuickBooks Online conversion. There were some challenges in the process, but the team performed very well and got me to a great outcome. Thank you again!!

Shanon Young
about 3 years ago

Very knowledgeable and helpful. So quick to answer all my questions. Highly recommend! Thanks Dan!!

QB Power Hour Store



Dad Hat with Leather Patch (Rectangle)

\$19.35



Unisex Softstyle T-Shirt

\$18.75



QB Power Hour - Magnetic Induction C...

\$49.50



QB Power Hour Color Morphing Mug, 1...

\$12.99



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- T-Shirts
- Hats

[Want to Create Your Own Swag Store?](#)

Upcoming Events

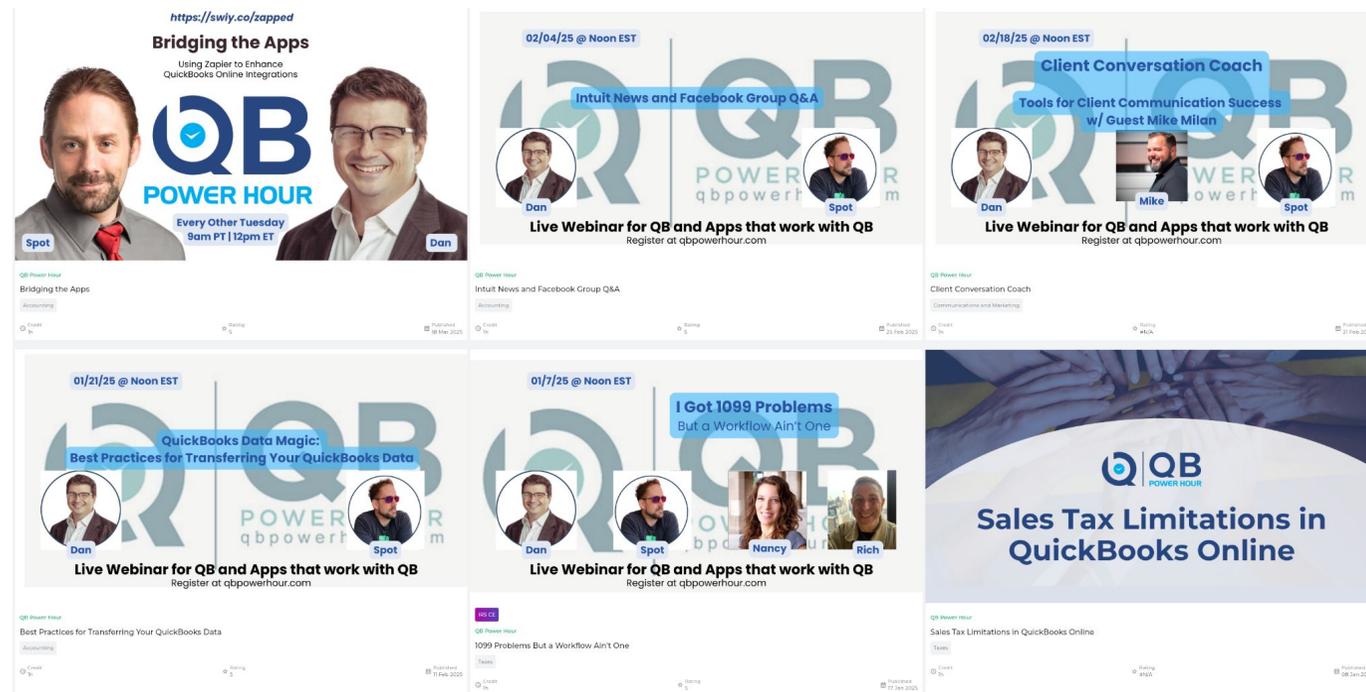
- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:
<http://qbtrainingevents.com>



Appendix

QB Power Hour on Earmark

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
- [Channel on Earmark](#)



Housekeeping

QUESTIONS



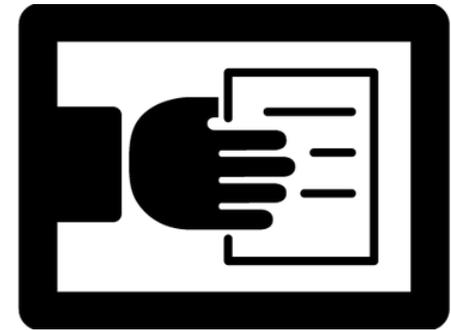
PLEASE USE THE Q&A
ICON FOR QUESTIONS
ON TODAY'S TOPIC

COMMENTS



IF YOU HAVE
COMMENTS, USE
CHAT

HANDOUTS



ALL HANDOUTS ARE
[HERE](#) OR ON OUR
[WEBINAR ARCHIVE](#)

Michelle L. Long, CPA, MBA

- **Owner** of Long for Success, LLC, Kansas City, Missouri
- **International speaker** – Intuit Trainer/Writer Network
- **Author** – 5 Books (Available on Amazon), numerous Intuit Academy courses, co-author QB and QBO Advanced Certifications
- **Co-Host** – <http://QBPowerHour.com>
- **Facebook Group** ~17,000 members
<http://facebook.com/groups/qbpowerhour>
- **Linkedin Group** ~160,000+ members – <http://tinyurl.com/qbgroup>
- **Honors & Recognition** – Most Powerful Women in Public Accounting, Top 100 Small Business Influencer, Top 10 ProAdvisor (Top Trainer/Writer & Top Social Media), SBA Financial Services Champion & more

Long
for Success LLC

