

<https://swiy.co/31825>

# Intuit/QB Updates and FB Group Post Q&A

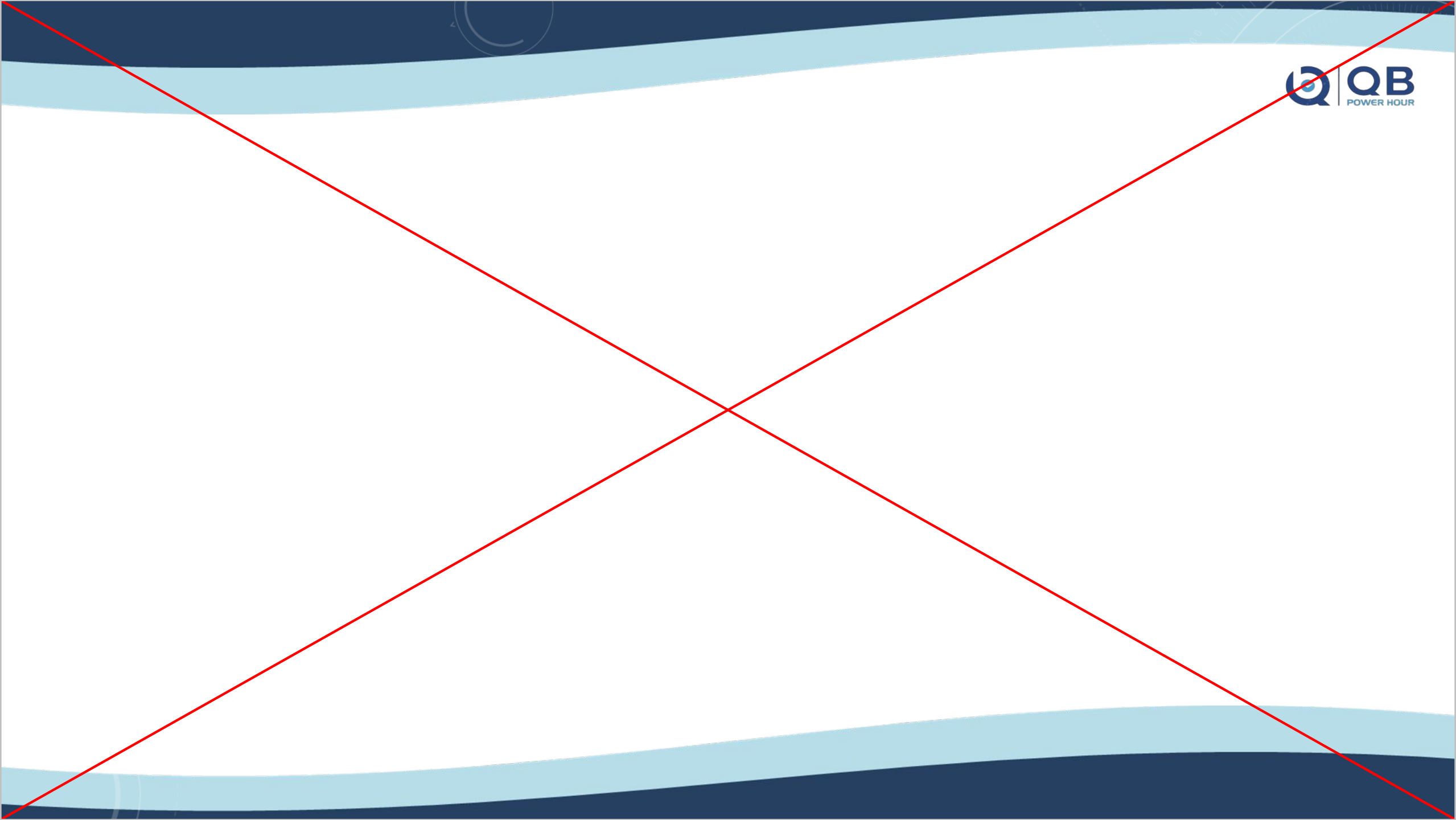


## POWER HOUR

Tuesday 8/5  
9am PT | 12pm ET

Spot

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** ~17,600 members  
<http://facebook.com/groups/qbpowerhour>
- **Tech Editor** of **QBO for Dummies** (since 5th edition - 2019-2024) and **QuickBooks All-In-One**
- **Top 10 ProAdvisor 2021** - Social Media



# Matthew “Spot” Fulton



- Founder of **Parkway Business Solutions**
- **QB Community Live** Facebook group
- Big Data Manipulator
- Workflow Design Nerd with API Experience
- Top Educator/Trainer/Writer 2021
- Top 100 ProAdvisor





# 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:

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar  
([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](http://www.qbpowerhour.com/resources)

## Want CPE for this Session?

- 1 Get the Earmark App
- 2 Take 5 Question Quiz
- 3 Receive CPE Certificate

This session will be recorded and available on demand, we'll email you when the CPE quiz is ready.

 EARMARK

[earmark.app](http://earmark.app)

## Intuit News:

- Agentic AI: Who are these Not so secret agents?
- New Bank Feed
- Intuit Technology Survey

## Top FB Group Posts



# Polling Question 1

What version of QuickBooks do you support with your clients?

- ☐ QB Online Only
- ☐ QB Desktop Only
- ☐ Both
- ☐ N/A

Spotlight Sponsor - [Free 14 Day Trial](#)

**method**





# AI Agents



# Intuit Agents

- 7 Agents in Total
- Simple Start - 0
- Essentials - 2 :Accounting, Payments, Customer Hub
- Plus - 3: +Customer Agent, Deeper AI Insights
- Advanced - 7: +Finance, Projects, Analytics, and Payroll Agent



# Intuit Agents - Essentials

- Accounting
  - Transaction Review “Ready to Post”
  - Auto Post - Look for Badges
  - Request more Info
- Payments
  - Personalize Payment Methods
  - Invoice Reminders
  - Late Fee Guidance
  - Auto-Fill Invoice
- Customer Hub (New)

# Intuit Agents - Plus

- More Accounting
  - Reconciliation
  - Report Analysis
- Customer Agent - \*\*Gmail (Google) Only
  - Reads emails 30 days prior
  - Lead Priority - Hot or Warm
  - Review Draft email
  - Schedule Meeting
  - Create Estimate





# Intuit Agents - Advanced

- Finance
  - Insights
  - Forecasting/Planning
  - Variance Analysis
  - Actionable Recommendations
  - Dashboard Summaries
- Projects
  - Project Tracking
  - Task Suggestions
  - Profitability Insights
  - Collaborate
- Payroll
  - Collects Data
  - Auto Payroll Runs
  - Request Approvals with needed
- Analytics
  - On-demand reporting and insights

## Polling Question 2

What are your thoughts about these AI Agents

- ☐ I've seen some interesting insights
- ☐ Wait and See
- ☐ All fluff, no substance
- ☐ N/A

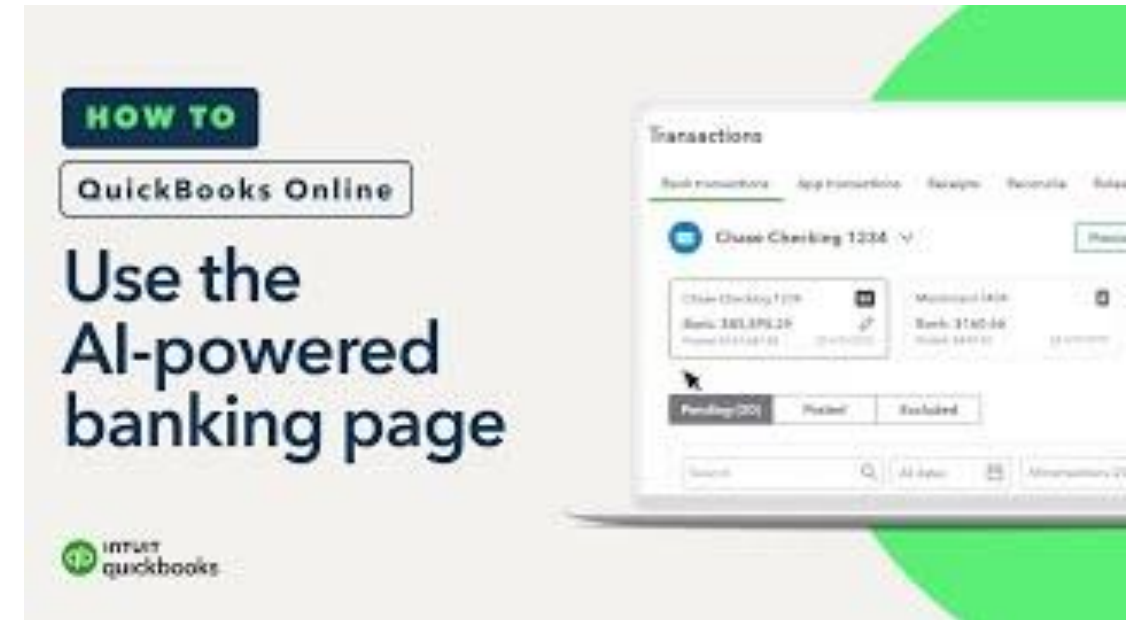
Spotlight Sponsor - [Learn More](#)

 Qbox

# AI-Powered Bank Feed

# New Bank Feed

- AI gets context from
  - Prior transaction history including attachments
  - Bank details
- Edit within the table
- Rules before AI
- Sparkles!!
- New Feedback Options - Just for Bank Feed



[S of B Blog Article](#)



## New Bank Feed - Resources



[Firm of the Future Article](#)



[July 31, 2025](#)

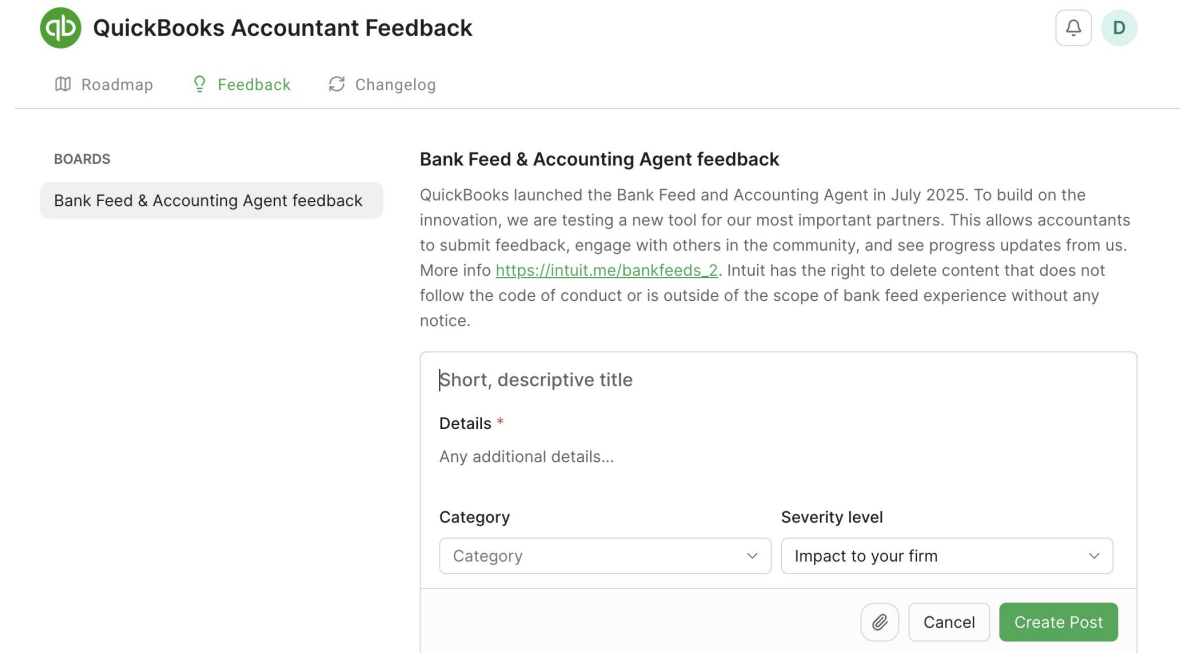


[S of B Blog Article](#)

# New Bank Feed - New Feedback Channel

- Accountant Only
- New Bank Feed Only
- See Prior Responses
- Upvote
- Intuit PMs and Developers comment
- See what's planned
- See What's implemented

[Register for Canny](#)



The screenshot shows the 'QuickBooks Accountant Feedback' interface. At the top, there's a header with the 'qb' logo, the title 'QuickBooks Accountant Feedback', and a user profile icon labeled 'D'. Below the header are three tabs: 'Roadmap', 'Feedback' (which is active), and 'Changelog'. The main content area is titled 'BOARDS' and features a board named 'Bank Feed & Accounting Agent feedback'. This board contains a text block explaining that QuickBooks launched the Bank Feed and Accounting Agent in July 2025 and is testing a new feedback tool. Below the text is a form for submitting feedback. The form has a text input for a 'Short, descriptive title', a 'Details' section with a red asterisk and a placeholder 'Any additional details...', and two dropdown menus for 'Category' (currently showing 'Category') and 'Severity level' (currently showing 'Impact to your firm'). At the bottom right of the form are three buttons: a pencil icon, a 'Cancel' button, and a green 'Create Post' button.

qb QuickBooks Accountant Feedback

Roadmap Feedback Changelog

BOARDS

Bank Feed & Accounting Agent feedback

QuickBooks launched the Bank Feed and Accounting Agent in July 2025. To build on the innovation, we are testing a new tool for our most important partners. This allows accountants to submit feedback, engage with others in the community, and see progress updates from us. More info [https://intuit.me/bankfeeds\\_2](https://intuit.me/bankfeeds_2). Intuit has the right to delete content that does not follow the code of conduct or is outside of the scope of bank feed experience without any notice.

Short, descriptive title

Details \*

Any additional details...

Category Severity level

Category Impact to your firm

Cancel Create Post

# Intuit Tech Survey 2025

# Who Responded?

- 700 Accountants
  - 36% Owner - 64% Employee
  - 24% >100 EEs
  - 52/47 - Male/Female
- April 2025





# AI and Automation

- 64% Plan to invest or upgrade AI Next Year
- 95% use automation
- 46% use AI Everyday



**Are we working on high value work or just shifting busywork?**

# Strategic Advisory

- 79% expect Advisory to Grow in their practice
- 94% believe it will boost revenue
- 95% tech helps spend less time on compliance work and more on client relationships



**Do current clients value high advisory services & are we equipped to deliver?**

# Tech Overload

- 8 Apps for core Operations
- 41% struggle to integrate them
- 28% staff training meets demand
  - 80% firms struggle to hire experienced pros
  - 75% need better training
- 66% feel overwhelmed weekly with tech
- Spending Less on tech

## More Tools could equate to more time figuring which tool to use



# FB Group Q&A



# About the QB Power Users FB Group



## [Link to Group](#)

- 20 posts/questions daily
- ~17,400 Members
  - ~9,000 Active
  - People helping People
  - Intuit presence
- Admin/Moderators
- Problems/Solutions
- Not designed to bypass Intuit
- Help given, not a Help wanted
- Give as much as you take



# QB Power Users FB Group



## Giving Back

- Working with donation marketplace
- When an issue is solved, giving back will be suggested
- Donate the value you received
- Donate to the cause that aligns with you



**People Helping People Helping People**

# QBO Payroll Filed \$0 Returns



QB Power User Community. By Michelle Long & Hector Garcia

April Miller · Top contributor · July 25 at 10:43 AM · 🌐

...

## Need Help – QBO Payroll Filed Returns After I Selected “DO NOT FILE” (Now Gusto’s Filings Rejected)

I need help from someone at Intuit QBO Payroll.

I switched a very simple SEP (owner-only) client from QBO Payroll to Gusto midway through Q2. When doing so, I explicitly checked “**DO NOT FILE FORMS.**”

What happened? **Intuit filed the Q2 RT-6 (Florida) and 941 anyway.**

Because of this, when Gusto attempted to file their Q2 returns, they were rejected. The IRS then issued a notice saying the client overpaid taxes — which they did not.

Yesterday, I called QBO Accountant Support. The rep clearly saw this was an Intuit error and reassured me that it would be resolved. I uploaded the Q2 941 and RT-6 that Gusto tried to file, along with the IRS notice, so amended returns could be prepared.

**Today, I got a notice that the case was cancelled.** Support now says they will not file the amendments — even after confirming on the phone that “DO NOT FILE RETURNS” was selected. It’s supposedly being escalated to second-tier support, but at this point, I am **beyond frustrated.**

Gusto won’t file the amendments because their filings weren’t accepted, and they didn’t file the originals.

Has anyone dealt with this? How can I get Intuit to fix their error and file the amended returns?

**HELP!**

[Link to Post](#)

# QBO Payroll Filed \$0 Returns



## Taxes and forms



Automate taxes and forms

On

We'll automatically pay and file your federal and state payroll taxes (including year-end filings) beginning with tax periods ending on or after **Tuesday, April 01, 2025**. We take out payroll taxes from your bank account when you run payroll or when there is a change in the taxes you owe.

[Find out more](#)

Cancel

Save

[Link to Post](#)

# Undeposited Funds Balance



QB Power User Community. By Michelle Long & Hector Garcia

Stacey Byrne · Moderator



All-star contributor

July 10 at 1:55 PM ·



EDIT: FOUND IT!! They are all QuickBooks Payments that were never deposited.

How do you troubleshoot a balance in Undeposited Funds in QBO? All payments have been deposited, there are nothing showing when I go to make a new deposit, but the GL has a balance.

I have searched the GL back to day one for any transactions posting to this account that are NOT deposits, payments or refunds and there is nothing coming up.

What next??

[Link to Post](#)









# Undeposited Funds Balance

Bank Deposit

|                          |                               |            |         |             |  |
|--------------------------|-------------------------------|------------|---------|-------------|--|
| <input type="checkbox"/> | Front Counter   Main Register | 08/05/2025 | Payment | Cash        |  |
| <input type="checkbox"/> | Front Counter   Main Register | 08/05/2025 | Payment | LS Payments |  |
| <input type="checkbox"/> | Front Counter   Main Register | 08/05/2025 | Payment | Check       |  |
| <input type="checkbox"/> | Front Counter   Main Register | 08/05/2025 | Payment | LS Payments |  |
| <input type="checkbox"/> | Front Counter   Main Register | 08/05/2025 | Payment | LS Payments |  |

QuickBooks Payments



Add funds to this deposit

| # | RECEIVED FROM | ACCOUNT | DESCRIPTION | PAYMENT METHOD | RE |
|---|---------------|---------|-------------|----------------|----|
| 1 |               |         |             |                |    |
| 2 |               |         |             |                |    |

Add lines

Clear all lines

Export CSV

This information can't be added when matching.

QB Payments (by default) is collapsed

“Normally” you never need to make these deposits manually. If QB Payments can’t make the deposit for you, you’ll find undeposited QB Payments here

[Link to Post](#)



## Polling Question 3

Was this information useful?

- ☐ Yes
- ☐ No
- ☐ N/A



# 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



[Buy Your Swag Here](#)

## Get Swag & Support The Show

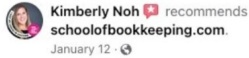
- Wireless Chargers
- Heat Activated Coffee Mugs
- T-Shirts
- Hats

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

# Quick Answers at schoolofbookkeeping.com

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


[Learn More](#)

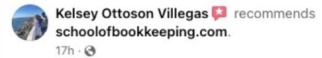


Kimberly Noh recommends schoolofbookkeeping.com. January 12 · 🌐

The School of bookkeeping is the place to go for all things bookkeeping.

**Kimberly Noh - Noh Hassle Bookkeeping**







Kelsey Ottoson Villegas recommends schoolofbookkeeping.com. 17h · 🌐

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!

**Kelsey Ottoson Villegas - OttoBooks LLC**






Lidiya Louk recommends schoolofbookkeeping.com. 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!!

Like 2 Share



Shanon Young recommends schoolofbookkeeping.com. about 3 years ago

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

Like 2 Share

# 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>

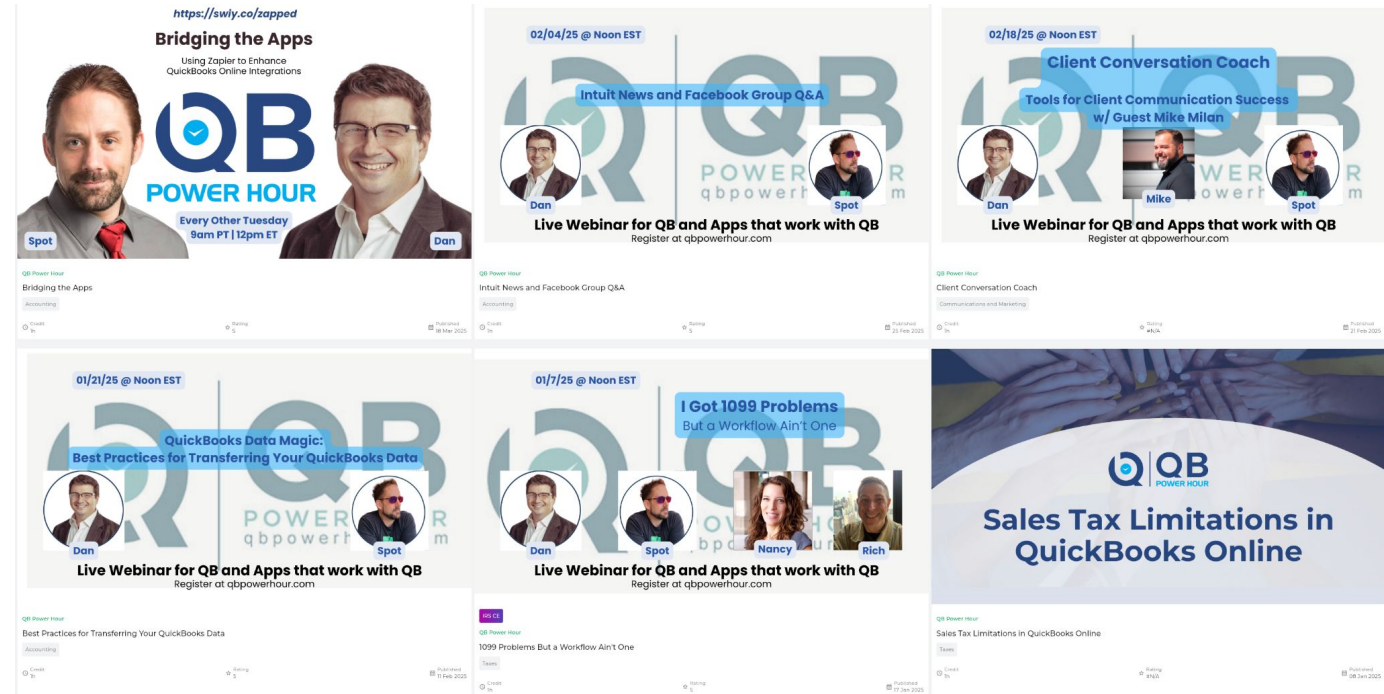


# Appendix



# 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



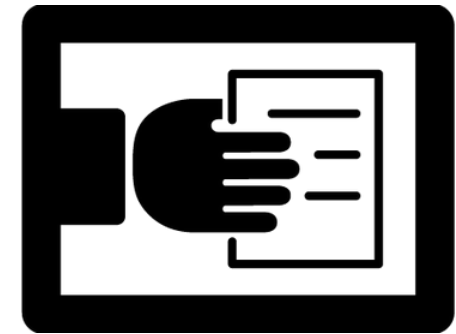
PLEASE USE THE Q&A  
ICON FOR QUESTIONS  
ON TODAY'S TOPIC

## COMMENTS



IF YOU HAVE  
COMMENTS, USE  
CHAT

## HANDOUTS



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



## **Best Practices in Troubleshooting QuickBooks**

Tuesday, April 1, 2025 @ 9:00 am PST | 12:00 pm EST

Dan DeLong  
Matthew “Spot” Fulton



# 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

