

May 17, 2017



Intuit Launches Free Practice Management Features in QuickBooks Online Accountant

New Dashboard Gives Accountants the Power to Seamlessly Track and Coordinate All Client and Firm Work in One Place

MOUNTAIN VIEW, Calif.--(BUSINESS WIRE)-- Intuit Inc. (Nasdaq:INTU) announced today the availability of free Practice Management features in QuickBooks Online Accountant, significantly reducing the number of tools accounting professionals need to manage their practice. Accountants in Australia, Canada, France, the United Kingdom and United States can now access the features directly in QuickBooks Online Accountant. The new work dashboard is fully mobile-enabled and gives accountants the power to track their work in the same place where they get it done. The availability of this first set of practice management features is the first step toward providing an end-to-end practice management solution designed with the accounting professional in mind.

“The Practice Management features in QuickBooks Online Accountant allow accountants to seamlessly track and coordinate all the work associated with their clients and firm, in one place, to help ensure nothing falls through the cracks,” said Rich Preece, leader of Intuit’s Accountant Segment, Small Business Group. “Accountants can now get high-level visibility across their initiatives – all in the cloud – and collaborate with clients and staff members much more efficiently.”

To develop the first Practice Management feature set, Intuit watched accountants complete their work and designed the new dashboard to solve three key challenges:

- **From tedious management to command center:** accountant work is completely deadline-driven, and the number of deadlines is enormous. The existing process to track client information and work is cumbersome, disjointed and highly manual, leaving employees overwhelmed and firm owners feeling anxious that deadlines might be missed, resulting in potential fines and client losses. With Practice Management, it takes seconds to create new jobs or tasks and assign them. Accountants can then edit job cards straight from the dashboard.
- **From disconnected to integrated solutions:** accountants often use several separate spreadsheets to track employees’ granular tasks, keep management informed of progress and track client information. Often times, there is no or very little integration between the tools they use every day to complete their work. QuickBooks Online Accountant is directly connected to the applications accountants use to perform work, making it the source of truth for client data and work management.
- **From broken to central client communication:** accountant communication with clients happens outside the context of work, which introduces challenges as much gets

lost in translation. In fact, Intuit estimates accounting professionals spend 65 percent of their time tracking down source documents from clients. Practice Management features allow them to send document requests and messages to clients from QuickBooks Online Accountant. Clients can view and respond directly from QuickBooks Online.

Practice Management is free, regardless of the firm size or number of clients. Click [here](#) to see Practice Management in action and for more information, visit bit.ly/practicemanage.

Practice Management User Quotes:

- “The limited integration between various tools used to make me worried I might miss a deadline. QuickBooks Online Accountant manages my workflow seamlessly in one spot, helping me manage employees’ tasks and track client information.” **Leanne Davis, Owner Operator, [Sort it Out – Office Assist](#), Albury, Australia.**
- “The new Practice Management features have enabled Jetstream Administration to be focused on delivering results to our clients instead of juggling multiple platforms of task lists and document requests. In one place, we can see what needs to be done and get it done!” **Jennifer Bauldic, President, [Jetstream Administration, Inc.](#), Toronto, Canada.**
- “Intuit as a company is always proactively looking for ways in which accountants’ lives can be made easier, and Practice Management is a feature which ticks this box so well. Anything that helps me to run a better business is very welcomed! This new feature gives the ability for me to create and assign new jobs or tasks in seconds and edit them straight from the dashboard. Less chance of deadlines being missed. Great!” **Fiona Fraser, Chartered Accountant and Founder of [Fraser+ Accountants](#), Perth, Scotland**
- “The new Practice Management in QuickBooks Online Accountant is saving me time before I even start using it! The first time I clicked on the ‘Work’ tab, it had already created payroll jobs based on my client list. Thanks for thinking of me, QuickBooks Online Accountant team!” **Stacy Kildal, Founder, [Kildal Services](#), White Lake, Michigan.**

About Intuit

[Intuit Inc.](#) is committed to powering prosperity around the world for consumers, small businesses and the self-employed through its ecosystem of innovative financial management solutions.

Its flagship products and services include [QuickBooks®](#) and [TurboTax®](#), which make it easier to manage [small businesses](#) and [tax preparation and filing](#). [QuickBooks Self-Employed](#) provides freelancers and independent contractors with an easy and affordable way to manage their finances and save money at tax time, while [Mint](#) delivers financial tools and insights to help people make smart choices about their money.

Intuit's [ProConnect](#) brand portfolio includes [ProConnect Tax Online](#), [ProSeries®](#) and [Lacerte®](#), the company's leading tax preparation offerings for professional accountants.

Founded in 1983, Intuit serves 42 million customers in North America, Europe, Australia and Brazil, with revenue of \$4.7 billion in its fiscal year 2016. The company has approximately 7,900 employees with major offices in the [United States](#), [Canada](#), the [United Kingdom](#), [India](#), [Australia](#) and other locations. More information can be found at www.intuit.com.

View source version on businesswire.com:

<http://www.businesswire.com/news/home/20170517005165/en/>

Intuit Inc.

Kim Amsbaugh, 650-944-6649

kim_amsbaugh@intuit.com

Source: Intuit Inc.