

Level up to Intuit Enterprise Suite

A configurable, AI-powered suite designed to seamlessly increase productivity and enhanced profitability for your growing business, all in one place.



Payments
& bill pay



Project
profitability



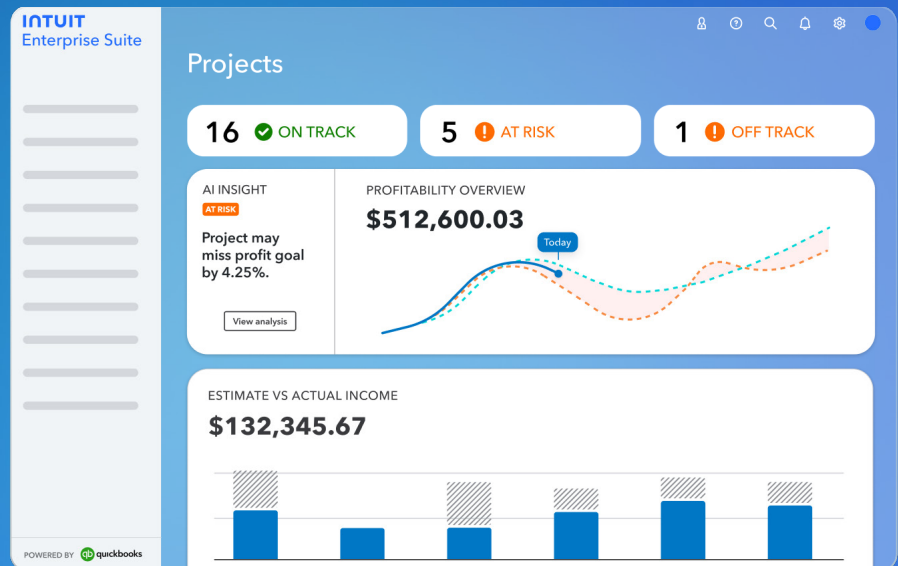
Financial
management



Payroll &
HR



Marketing



How growing businesses keep growing



Enterprise power made intuitive

Robust financial management with multi-entity accounting, real-time data, and reports.

Automated across your business

Streamline workflows across the platform and spend less time on manual tasks with AI-powered automation.

Industry-specific customizations

Drill down with project profitability, multi-dimensional reports, and third-party apps.

A dedicated partner at every step

Get the most from your suite with a single point of contact and access to a team of experts.

Power your business beyond your books

Multi-entity management & accounting

Boost your team's productivity with multi-entity management and get quicker visibility across your entire portfolio with consolidated reporting.

- **Manage entities and users easily:** Manage up to 100 entities from a single sign-in and switch seamlessly from a single drop-down. Centrally manage users from one place to assign granular access across entities as your team grows.
- **Automate and save time:** Save time by handling intercompany transactions right from your bank feed or through journal entries with the ability to do manual eliminations as well. Quickly copy chart of accounts across entities to ensure consistent reporting or map accounts across entities when they vary by entity.
- **Get 360-degree portfolio visibility:** Increase line of sight across your business and drill down easily to understand what's driving your business performance by creating and viewing consolidated multi-entity reporting in Custom Report Builder. Seamlessly export to spreadsheet or PDF as needed.



Business insights & intelligence

Get more out of your data with multi-dimensional custom reporting and KPI monitoring that give you the real-time insights you need to make smarter decisions.

- **Organize your data and streamline chart of accounts:** Categorize your data and get deeper insights with up to 20 custom dimensions without manual workarounds or a large chart of accounts. Categorize accounts receivable, accounts payable, budgets, forecasts and bank transactions at the line-item level by dimensions.
- **Build custom and multi-dimensional reports:** Track your entire portfolio your way with the custom report builder. Pull in data from across the platform and third-party integrations without having to export to spreadsheets.
- **Get industry-specific insights:** Take advantage of industry-specific reports and KPI dashboards specific to your role to stay on top of what matters most to your business.



Project financials & job costing

Streamline your projects and boost profitability with end-to-end tools and integrations.

- **Ensure on-time delivery and manage profitability:** Project financials, integrated with QuickBooks Payroll and Time, is used across construction, hospitality, manufacturing and services industries to measure real-time profitability including labor costs. Use AI-generated project 360 insights to perform root cause analysis and understand profitability drivers.
- **Plan with efficiency:** Create and customize project workflows and templates to automate reminders and other project tasks.
- **Execute projects across a growing team:** New project manager role allows access to necessary project information, while protecting sensitive data. Expanded workflows for project managers focuses on execution of work. Assign tasks by project to any user and track how they progress.
- **Manage change orders:** Create change orders with client approval workflows to keep your projects moving forward.
- **Construction industry customization:** Optimized integrations with Knowify and BigTime.
- **Simplify project accounting:** Automate revenue recognition with custom, percentage-to-complete, or project milestone methodologies.
- **20 project reports:** (including)
 - Cost to Complete
 - Committed costs
 - Project Costs Detail
 - Budget vs Actuals
 - Change Orders
 - Unpaid Bills by Vendor and Product
 - Work in Progress
 - Project Status
 - Time by Employee and Project
 - Unallocated Amounts
 - Project Costs by Vendor and Product

Financial planning & analysis

Continue growing with robust planning tools and performance monitoring.

- **Set goals and plan as a team:** Create company goals for performance monitoring and plan financial budgets across departments using dimensions with collaboration capabilities including tasks and approvals for authorized users.
- **Unlock actionable insights:** Predict future trends with AI-generated forecasts and set approvals to keep your team aligned. Leverage real-time cash flow alerts based on transactions and bank account data.

Role-based access

Boost your productivity with greater and more secure collaboration across the platform.

- **Scale securely:** As your team grows and needs Intuit Enterprise Suite access, you can now define granular roles and permissions. Limit access to only what's essential and ensure only the right employees have the ability to make changes relevant to them.
- **Assign standard roles:** With new, predefined roles for bookkeeper and Project Manager, you can quickly onboard your team and customize their permissions as you see fit.

Payroll & HR

Pay and manage your growing team with confidence all in the suite.

- **Stay compliant:** Work with HR advisors to ensure your business remains compliant with labor laws and regulations.
- **Care for your team:** Offer comprehensive benefits, including healthcare, retirement plans, and workers' compensation policies.
- **Let your team self serve:** Allow your team to track time, view pay details, and access W-2s with an easy to use mobile app.
- **Integrate payroll and accounting:** Simplify your payroll expenses and reporting with an instant sync to your general ledger.



Payments & bill pay

Manage your cash flow with powerful AR/AP tools, including online payments and bill pay to get paid faster.

- **Get paid:** Send instantly payable invoices with various payment options, automated reminders, and follow-ups.
- **Pay bills:** Seamlessly track, manage, and pay your bills in a single platform. Schedule payment ahead of time so you stay in control of your cash flow.
- **Set up approval workflows:** Streamline your AP and AR approval processes with automated workflows that follow predefined rules. Assign roles and permissions to decide who can create, approve, pay bills, or send invoices.



Marketing

Personalize your marketing with Intuit Enterprise Suite customer data, produce emails in a click with generative AI, and reduce time-consuming steps with automation and integration from Mailchimp.

- **Experience data-driven marketing:** Utilize Intuit Enterprise Suite customer data, such as purchase recency and purchase volume, to create targeted marketing campaigns with personalized content across email and SMS to improve engagement with your customers and increase campaign performance.
- **Let AI do the heavy lifting:** Create content faster with AI-generated emails, texts, and automations in a click.
- **Connect to apps:** Automate data flow between Mailchimp and over 300 market-leading apps including stores, accounting, tools, social media, and more.

Dedicated partnership

Partner closely with a dedicated customer success manager to help your business get the most out of Intuit Enterprise Suite.

- **Get the support you need from day one:** Your customer success manager will create a personalized setup plan and answer any questions.
- **Migrate data and connected apps:** We'll ensure your data migrates accurately from your old solution and implementation goes seamlessly through your first month close.
- **Identify opportunities to grow your business:** Get the most from your suite with in-depth business reviews led by your customer success manager, complete with proactive insights, updates, and tips.
- **Resolve issues fast:** Work with your customer success manager to resolve issues, including escalating to experts and back-office teams when needed.

Intuit is trusted by nearly 8 million businesses worldwide, powering prosperity at every stage of growth.



INTUIT

Enterprise Suite

Powered by  quickbooks +  mailchimp

Product information represented includes a combination of live features and features coming Fall 2024.

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QuickBooks Payments & Bill Pay: Account subject to eligibility criteria, credit, and application approval. Not available in U.S. territories or outside the U.S.

*Features

- **HR services:** HR support and advisors are provided by experts at Mineral, Inc. Additional terms and conditions apply.
- **Health benefits:** Provided in partnership with Allstate Health Solutions. Intuit Insurance Services Inc., is a licensed insurance broker and is paid a percentage fee of insurance policy premiums in connection with the services. Sold separately. Additional terms and conditions apply.
- **Guideline 401(k):** 401(k) is provided and administered by Guideline. Intuit is not a 401(k) plan administrator, fiduciary or other provider. Sold separately. Additional terms and conditions apply.
- **Workers' comp administration:** Benefits are provided by NEXT Insurance. Not available in OH, ND, WA and WY. Sold separately. Additional terms and conditions apply.
- **SMS Marketing:** SMS is available as an add-on to a paid plans only. Application and agreement to terms is required before purchasing credits. Messages can only be delivered to contacts in the country selected. SMS credits are added to your account after purchase and approval. Credits are issued monthly and unused credits expire and do not roll over. Pricing varies. See terms for details.