



WHITE PAPER

How ProConnect Tax's AI integrations amplify your expertise and enhance your practice

INTUIT ProConnect™ Tax



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Executive summary

Technology evolves at such a rapid pace that it can feel impossible to keep up with it. Only recently, artificial intelligence (AI) began trickling into many parts of everyday life, from making grocery lists to writing emails. AI has become a powerful tool for speeding up formerly clunky and time-consuming tasks—and that's especially the case for tax and accounting professionals.

It's become imperative to use AI in day-to-day work, whether eliminating repetitive processes or saving time on manual data entry.

There are many ways AI can supercharge your work, but it can be tough to know where to start. To save you time from asking ChatGPT exactly how AI can help your firm, we have created this white paper to demonstrate how Intuit [ProConnect™ Tax](#) is your AI partner. Intuit® Accountants has been committed to integrating practical AI that can deliver a competitive edge through **increased productivity, enhanced accuracy support, and a better experience for your staff**. Crucially, the AI-powered features in ProConnect Tax not only streamline compliance, but also strategically *amplify your expertise*, helping you evolve from a compliance provider to an indispensable, year-round strategic advisor, driving efficiency and delivering expanded value to your clients.

Our integrated solutions, including the new Intuit Tax Advisor, are about **future-proofing your firm** with tools that work for you, always keeping you in control.

Key features of ProConnect Tax at a glance

- **Intelligent data import:** Understands the context of data on uploaded documents, helping to accurately populate fields into the tax return, ready for your verification.
- **Predictive navigation:** Anticipates user patterns and suggests the most likely next step to help reduce clicks and search time.
- **Automated client briefings:** Pulls key information from more than 60 data points in your client's previously filed return, using generative AI to create a summary that can give you a head start on their next return.
- **AI-driven review engine:** References a large database of diagnostics, offering a deep, contextual review of every return, preparing insights for your evaluation.
- **Anomaly detection:** Leverages intelligence and data to reduce review time, flag meaningful trends, and strengthen client communication.

- **Virtual team of AI agents:** Provides access to a team that saves you time, simplifies the day-to-day running of a business, and helps you more confidently and quickly advise clients on key decisions.
- **Intuit Tax Advisor:** Built into ProConnect Tax, Intuit Tax Advisor becomes your generative AI partner for tax advisory, designed to quickly identify optimal tax strategies for clients and generate personalized, actionable tax plans.

ProConnect Tax [strategically integrates AI](#) to amplify the expertise of tax professionals, helping drive practical benefits, rather than just chasing technological trends. With that in mind, our AI tools are designed to aid human creation and make tasks easier, not to replace professional judgment.

Embracing an AI-supported future

By now, talk of AI is almost inescapable. From passionate discussions on LinkedIn to chats over lunch at the office, it's made its way into every professional setting. AI has become intertwined with daily life outside of work, too. Think of the new features on your smartphone you've just learned to use, the address you voice-spoke to your GPS, the chatbots you've asked questions, or the AI-generated images flooding your social media feeds.

In other words, AI is no longer a futuristic buzzword—**it's already part of our reality**. For accountants, those reluctant to adopt it will inevitably fall behind. In such a fast-paced landscape, AI has begun to create a [digital divide between firms](#) that embrace its potential and those that do not.

Rather than asking yourself "Should I lean more into AI?" in your firm, you should be asking "How should I lean more into AI?" to make your firm even more efficient than it already is. To succeed, 95% of accountants and bookkeepers say a willingness to learn and adopt new technologies is just as important as traditional accounting skills, according to the most recent Intuit QuickBooks® [Accountant Technology Survey](#).

Integrating AI-powered technology into your workflow doesn't mean jumping on the bandwagon and adopting automation for automation's sake, either. The goal is to build a future-ready firm with advanced tools that can help you get there by eliminating repetitive tasks and [creating the capacity for higher-value work](#), empowering your team to do their best work, and evolving your offerings to deliver the quality service your clients demand.

In fact, accountants who use generative AI can support more clients, close the books faster, and provide higher-quality service, according to a [new study](#) by Jung Ho Choi, an assistant professor of accounting at Stanford Graduate School of Business, and Chloe Xie, Ph.D., of MIT Sloan School of Management.

Still, among the 277 accountants surveyed in the study, 62% said they were concerned about AI-generated errors and 37% were worried about job stability. But the findings quell those fears, stating that firms using generative AI saw a 12% rise in reporting quality. Rather than replace accountants, AI works best when paired with human expertise.

“AI can help synthesize information and standards for auditors to quickly get the gist of what matters,” Choi told [Insights by Stanford Business](#). “But that final judgment call—it’s still a human decision.”

Harnessing the power of AI in ProConnect Tax

In a constantly changing world, ProConnect Tax offers an AI-powered workflow designed to help shape successful firms. Inuit has long focused on integrating automation to deliver real-world advantages, and now we’ve combined basic automation and artificial intelligence to provide practical benefits that truly matter: efficiency, accuracy support, and the ability to focus on high-value client service.

The AI tools in ProConnect Tax aren’t intended to replace the invaluable expertise of tax professionals; instead, they act as a sophisticated amplifier, automating routine tasks for your review, anticipating client needs by surfacing information, and providing informed insights. This allows your firm to finesse your compliance workflow and navigate the complexities of the modern tax landscape with greater confidence. It supports strategic growth, with you always making the final decisions.

When it comes down to it, our AI is really about providing practical, intelligent tools that empower your firm to move beyond the limitations of the past and seize the opportunities of the future.



Slash data entry with intelligent data import

One of the most significant time drains in tax preparation is manual data entry. Gone are the days when we kept numbers solely on spreadsheets, but manual data entry is still present in many parts of our work. We know manual entry is tedious, prone to errors, and consumes hours that could be better spent on higher-value client work. In fact, a recent survey showed that accountants reported spending more than one-third of their time manually entering client data.

ProConnect Tax addresses this directly with its AI-powered data import. Instead of keying in numbers line by line, our system intelligently helps extract information from an array of source documents, including W-2s and 1099s. It understands the context to accurately populate fields into the tax return for your final review and verification. With coverage of many common tax documents, this feature can fundamentally change how your firm allocates resources. ProConnect users have reported saving more than 30 minutes on average, per return, by importing data, freeing up staff for more complex tasks and valuable client interactions.



Intelligent data import into ProConnect Tax saves us a lot of time, especially with cumbersome K-1s. The AI understands the context of the data, providing the guardrails our preparers need to ensure information is inputted correctly into any given form.

– **Shahab Maslehati, ChFC, CFE, owner, [Seed Money Consulting](#)**





Steer through complexity with predictive navigation

Tax software can often feel complex, especially when dealing with intricate returns involving numerous forms and schedules. ProConnect Tax manages this with “Smart Nav,” an AI-powered feature that helps create a more intuitive and streamlined workflow.

Smart Nav becomes even more important for more complex returns, especially during extension season. By analyzing the screens you’ve visited and the specifics of the return being prepared, the system intelligently anticipates and suggests your most likely next steps. This predictive navigation will learn user patterns over time, evolving into an efficient tool that can reduce the learning curve for new team members and empower seasoned professionals to navigate returns with improved speed and ease by leveraging its guidance.



I like predictability, and ProConnect is predictable for us—it allows us to create a workflow that’s intuitive to our clients, but also helps our team save time. The AI-powered Smart Nav is a great example. It seems to anticipate our next move, making navigation through complex returns feel second nature. And we’re only able to do that because we are doing this in just one software.

– **AI-Nesha Jones, CPA, MPA, owner, ASE Group**



Bridge compliance and advisory with automated client briefings

As your firm grows, it might feel more unwieldy to maintain personalized experiences with each and every client, especially when pre-meeting prep can take as long as two hours.

The screenshot displays the 'JOHNSON TAX' client profile for Steve Rodgers. The interface includes a navigation sidebar on the left, a top navigation bar with 'Help', 'Notifications', and 'Settings', and a main content area. The client's contact information is listed: Email (indcouple@sample.com), Address (5601 Headquarters Dr, Plano, TX 75024), and Home phone ((555) 111-2222). A modal window titled 'View client snapshot using Intuit Assist BETA' is open, showing a 'Summary of Tax Filings for 2023'. The summary states that the client has filed both corporate and partnership returns. The 'Partnership Return' details are as follows:

- * Net Income (Loss): (\$300,070)
- * Total Assets (Beginning of Year): \$12,960,817
- * Total Assets (End of Year): \$12,614,795
- * Total Liabilities & Capital (Beginning of Year): \$3,342,558
- * Total Liabilities & Capital (End of Year): \$3,042,488
- * Number of K-1s Issued: 75
- * Principal Business Activity Code: 531120 (Lessors of Residential Buildings and Dwellings)
- * Filing Type: Domestic Limited Liability Partnership

Below the summary, there is a 'Copy to clipboard' button, a 'Leave feedback' link, and a disclaimer: 'The data you provide is secure. We collect, use and store data in accordance with Intuit's privacy policy. We're currently experimenting the use of Generative AI. Response may be limited and inaccurate at this time. Be sure to take a look before using it.' At the bottom of the client profile, there are tabs for 'Tax returns', 'Tax plans', 'Documents', and 'IRS Transcripts', and a 'Create tax return' button. A search filter and a table header are also visible at the bottom of the interface.

Return name	Type	Tax Year	Status	Tax saving
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That's where ProConnect Tax's [AI Client Briefing feature](#) comes in to help—to give you back that time. This briefing turns the conclusion of a compliance task into the beginning of a strategic dialogue about your client's financial future, teeing up the [perfect advisory conversation](#). In fact, in a recent poll of ProConnect Tax users, the majority of respondents reported spending less than one hour reviewing each client's tax situation before engaging with them for the following year, thanks to Client Briefing.

But what comes next? How do you easily transition from *identifying* advisory opportunities to *delivering* actionable strategies? Intuit Tax Advisor, your generative AI partner, steps in to provide that critical bridge.

Intuit Tax Advisor pulls key information from more than 60 data points in your client's previously filed returns using generative AI to surface a summary that can give you a head start on the client's next return. In an instant, extra time spent behind the scenes on client relationships is taken care of, and you can focus on building the relationship. With the AI briefing feature, it's never been easier to scale personalized and easy-to-understand support to your clients.

Support accuracy with an AI-driven review engine

Compliance is non-negotiable. A missed deduction or a simple calculation error can have significant consequences for your client and your firm. ProConnect's AI acts as your vigilant partner, working tirelessly in the background to help you maintain accuracy.

This isn't a simple spell check; our AI-powered tax engine performs continuous, always-on analysis, referencing a large database of diagnostics. This deep, contextual review means potential errors are often identified and surfaced for your professional judgment, which can dramatically reduce review time and enhance your firm's confidence in every filed return. **It's like having an extra set of expert eyes on every single return, 24/7.** Think of it as an extra layer of scrutiny, with you making the final call.



The AI-driven diagnostic tools provided by ProConnect have been an invaluable resource. They have helped us streamline our processes and elevate our services. Thanks to these tools, I am able to better serve my clients and improve our overall performance.

– **Ricky Cobban, lead tax preparer, EPL Financial Services**



Reduce errors with anomaly detection

[QuickBooks Online](#) integrates with ProConnect Tax to enable a smooth books-to-tax experience, but did you know QuickBooks Online and QuickBooks Online Accountant are already powered by AI? In fact, one of the favorite features is [anomaly detection](#).

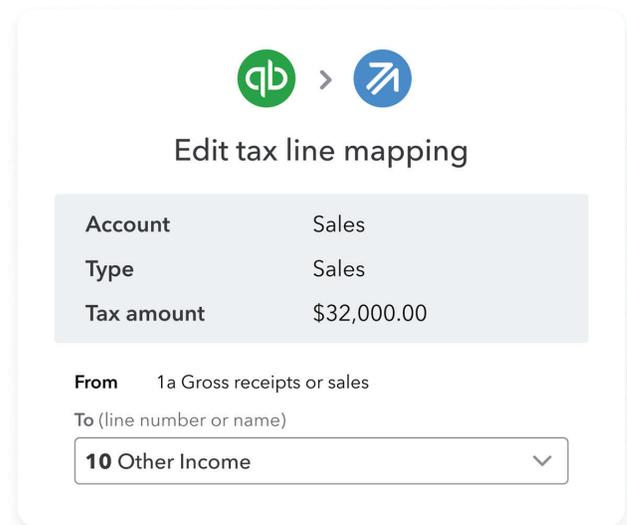
As almost all tax accountants can attest, one of the most common challenges is knowing where to zero in on large amounts of data. With so many numbers, cells, rows, and columns to review, it can be easy to miss the one that would cause a headache. Anomaly detection from Intuit's AI-powered accounting agent has your back. It's a tool embedded into QuickBooks that applies intelligence to your clients' financial data and flags the activity that is most important to review.

Anomaly detection's strength lies in highlighting unusual changes based on historical trends. So instead of spitting out calculations, it provides helpful context.

Two main features achieve this:

1. A trend graph shows recent behavior in the account, helping you see whether a change is part of a developing trend or a one-off event.
2. A root cause section identifies the specific transactions responsible, such as a journal entry, vendor bill, or client invoice.

Each time an anomaly is detected, the accounting agent tells you exactly what changed and gives you the transactional breadcrumb trail. All of this allows you to work faster and more confidently.



Account	Sales
Sales	Sales
Tax amount	\$32,000.00

From 1a Gross receipts or sales

To (line number or name)

10 Other Income

Lean on a virtual team of AI agents

In addition to the AI-powered tools designed for ProConnect Tax, you also benefit from the newly launched Intuit AI agents. They help your business clients at every growth stage to scale, enabling them to grow on the Intuit platform they know and trust.

AI agents complete day-to-day tasks, including managing customer leads, tracking payments, sending invoices, and reconciling a business's books. Plus, integrated collaboration tools allow a business owner and their accountant to seamlessly communicate and work together in QuickBooks. With the automation of workflows, collaboration with trusted experts—and the ability to deliver real-time personalized and actionable insights—businesses move faster, operate smarter, and uncover greater efficiencies. It's all a perfect recipe for your clients to grow revenue and keep their books cleaner for tax time.

There are several different kinds of agents to lean on for help:

- **Payments agent:** Optimizes and grows cash flow by getting businesses paid an average of five days faster, with tailored acceleration strategies that predict late payments, automate invoice tracking, and create and send invoices and reminders.
- **Accounting agent:** Automates bookkeeping and transaction categorization, and assists in reconciliation to deliver cleaner, more accurate books.
- **Finance agent:** Provides a comprehensive approach to the financial management of growing, mid-market businesses with robust reporting, key performance indicator (KPI) analysis, and scenario planning and forecasting based on performance and peer benchmarking. This helps finance teams make smart decisions to achieve financial goals.

The Customer Hub, included in most QuickBooks Online plans, also provides two new virtual agents that automate and streamline the sales and customer relationship management process. They manage new leads and existing customers in one place to deliver positive customer experiences and stronger relationships:

- **Customer agent:** Sources leads, drafts personalized email responses, suggests and schedules meetings based on engagement data, and tracks every customer opportunity in the sales cycle.
- **Marketing agent:** Coming soon, this agent will automate audience management, campaign execution, and content creation to deliver impactful acquisition and retention marketing campaigns through [Mailchimp](#).

Additional agents, such as payroll and project management agents, are also in development.



Turn to Intuit Tax Advisor, your generative AI partner for tax advisory

In a landscape of ever-changing tax laws, coupled with an increasing demand for proactive guidance, identifying and communicating optimal tax strategies can be time-consuming and complex. [Intuit Tax Advisor](#), now built into ProConnect Tax, specifically helps you find the best tax strategies for your clients, quicker than ever.

▼ Existing 2023 strategies

<input checked="" type="checkbox"/>	S Corporation choice of entity	Bob Sanders (T) ▼ SCHEDULE C	135,000	Details
<input checked="" type="checkbox"/>	Bonus depreciation	Bob Sanders (T) ▼ SCHEDULE C NET INCOME	135,000	Details

▼ New 2023 strategies

<input type="checkbox"/>	Augusta rule - tax free rental income	Tax-free income (T) FORM 1040	<input style="width: 50px; border: 1px solid #ccc;" type="text" value="0"/> <input style="width: 50px; border: 1px solid #ccc;" type="text" value="15,000"/>	Details
<input checked="" type="checkbox"/>	Cost Segregation Study	Inherited Farm (T) ▼ SCHEDULE E	<input style="width: 50px; border: 1px solid #ccc;" type="text" value="0"/> <input style="width: 50px; border: 1px solid #ccc;" type="text" value="15,000"/>	Details

Intuit Tax Advisor's powerful mechanics and benefits include:

- **Automated strategy generation:** Leverages generative AI to analyze a wide range of client data from ProConnect Tax and automatically identifies relevant tax-saving strategies in an instant.
- **Personalized tax plans & reporting:** Generates [user-friendly reports](#) and personalized plans to help you provide the most applicable and impactful strategies for your client, moving beyond raw data to client-facing deliverables.
- **Dynamic law integration & scenario planning:** Automatically incorporates legislated tax law updates into your planning and projections, harnessing the power to create various scenarios—from return impact to maximum contributions or deferral amount—for robust client discussions.
- **Connection to QuickBooks Online Accountant:** Maintains a seamless integration to Quickbooks Online, making the “books-to-tax-to-advisory” workflow a reality.



Intuit Tax Advisor being included in the ProConnect Tax will make my life easier. Its ability to automatically generate AI-powered tax strategies makes advisory seamless—all in one place, all included in one fee.

– Tatiana Tsoir, CPA owner, [Linza Advisors](#)



The AI advantage in practice

For a modern tax and accounting firm, adopting Intuit's AI-powered ecosystem becomes a strategic business decision—not just another investment in technology. The results tend to speak for themselves.

The Intuit AI platform powering your firm

Focusing on you

At Intuit, we're investing billions to expand our platform capabilities and AI, so that we can help tax and accounting pros run and grow their businesses.





Intuit Assist

Built with Intuit's proprietary GenOS, this AI assistant is embedded across our platforms to help you work smarter and deliver greater value for your customers.



Harnessing AI and data

By generating 60 billion machine learning predictions every day, Intuit is able to bring you uniquely personalized insights with accuracy and unparalleled speed.



End-to-end AI workflow

From AI agents in QuickBooks ensuring clean books, to ProConnect intelligently mapping data for accurate returns, to Intuit Assist helping build impactful client tax plans.

When you embrace Intuit's integrated approach, your firm can achieve:

- **Increased productivity:** Allow your firm to handle more volume without sacrificing quality by automating low-value tasks and dramatically accelerating high-level strategic analysis.
- **Enhanced accuracy and trust:** Leverage an AI-driven review engine for compliance and AI-vetted strategies from Intuit Tax Advisor for advisory to reduce firm risk and deepen client trust.
- **A better experience for your staff:** Mitigate burnout from tedious, repetitive work and empower your team with intelligent tools that let them focus on the engaging, strategic work they find most rewarding.
- **A future-proofed firm:** Position your practice to not only survive, but thrive in an increasingly complex world, transitioning from a compliance provider to an indispensable, year-round strategic advisor with the strategic insights provided by Intuit Tax Advisor.

By embedding AI thoughtfully and practically into its core products, **Intuit Accountants is demonstrating that the future of the tax profession is not about replacing professionals; it's about empowering them.** It's an approach that warrants a closer look for any firm serious about its future success.

Work more efficiently with ProConnect Tax

Intuit [ProConnect Tax](#) is cloud-based professional tax software that allows you to create tax returns in minutes, from anywhere. ProConnect Tax streamlines workflows, automates tasks and reduces manual data entry errors, and creates efficiencies so work is completed faster. As an Intuit product, ProConnect Tax seamlessly integrates with [QuickBooks Online Accountant](#), the go-to software when working with a business owner's books.

Integrating with ProConnect Tax is Intuit Tax Advisor, an advisory tool that automatically generates strategies for client tax savings. Intuit Tax Advisor is the only tax software that combines QuickBooks Online Accountant and Intuit Tax Advisor for maximum productivity and exceptional results.

Notable features

Much like technology, tax rules can change in an instant. In order to help keep you and your clients in the know, Intuit used customer feedback to develop smart features, including the following:

- **Intuit Tax Advisor integration:** Within ProConnect Tax is Intuit Tax Advisor, an advisory tool that automatically generates strategies for client tax savings. Intuit Tax Advisor is the only tax software that combines QuickBooks Online Accountant and Intuit Tax Advisor for maximum productivity and exceptional results.
- **IRS transcript direct access:** You can pull all of your client's transcripts directly from the IRS into ProConnect Tax; complete tax returns faster and more accurately with less client back-and-forth tasking.
- **Flags:** Tax preparers can flag missing data, estimates, and fields needing review within ProConnect Tax. Flagged items can be reviewed by clients and accounting professionals in an input drawer, which also houses imported documents, autofills tax document fields, and marks them for review.
- **Customized client letters:** Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields.

- **1040 import:** Generate a tax summary comparison for the current tax year by creating a new client and using the relevant information from their previous year's Form 1040.
- **Seamless data conversion:** Intuit's Easy Start team of onboarding experts help customers just like you. They'll walk you through the process to ensure your clients' data is converted accurately.

Intuitive tools embedded in ProConnect Tax are among the integrations that save users money, time, and energy:

- **Intuit Link:** Enjoy a cloud-hosted portal that gathers and manages clients' tax documents and data. With [Intuit Link](#), instead of badgering clients for information, you can send them an email link request. Set up automated email reminders every seven days to log into the Link client portal and upload documents.
- **Electronic signature:** Intuit [eSignature](#) provides a quick and convenient way to request signatures. Rather than chasing down clients to sign in ink or using a third-party tool to request signatures, eSignature quickly collects digital client signatures.
- **Protection Plus:** With [Protection Plus](#), receive access to a dedicated team of experts who can handle tax notices and audits.



As a cloud-based professional tax software, ProConnect Tax modernizes your workflows by taking care of tedious, low-value tasks. Whether your firm has one user or 1,000, custom pricing options cover all firms with tax return bundles of every size. Call **844-534-2388** or [schedule a demo](#) with a tax software specialist today to get started.



Conclusion

As technology continues to reshape the tax and accounting landscape, it's clear that AI is not just a passing trend. It goes far beyond chatbots and auto-generated images; AI has the power to enhance almost every aspect of your work.

At Intuit Accountants, AI is working behind the scenes to create powerful tools for you. Far from replacing tax professionals, these AI features enhance human judgment, offering tools that streamline processes, reduce errors, and elevate the quality of client service.

The features embedded into ProConnect Tax are among the most impactful. Time-saving tools such as intelligent data import and automated client briefings can make pre-meeting preparation a breeze. Predictive navigation and an AI-driven review engine help you find exactly what you need when you need it. And with Intuit Tax Advisor, you can seamlessly shift from compliance to high-value advisory, delivering sophisticated tax strategies with unprecedented ease. ProConnect Tax helps you [deliver more value with less time and effort](#), amplifying your expertise and enhancing your practice.

The future of accounting belongs to those who are willing to evolve, not by abandoning their professional skills, but by empowering them with intelligent tools that keep them ahead of the curve. Now is the time to shift the question from *whether* you should embrace AI to *how* you'll adopt the technology that makes it a cornerstone of your firm's growth and success.