

Break the AP Bottleneck Holding Advisory—and Clients—Back

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Accounting firms increasingly view client accounting services (CAS) as a way to increase revenues, improve client retention, and deepen client relationships. In fact, 85% of Accounting Today's 2026 Top 100 Firms say CAS is growing, up 5% from 2025.

"Today's clients expect more than accurate books and timely filings," said Juliana Berger, Director of Product Management at Intuit QuickBooks. "They want guidance on cash flow, hiring decisions, capital investments, profitability, and long-term stability. They are looking for a strategic partner who understands their business' longer term goals and can provide real-time guidance on steps needed to get there. If firms are not providing that perspective, someone else will."

But how can you focus on CAS while you're busy putting out fires and tracking down documents? Likewise, clients can't focus on strategic decisions if they're bogged down by manual tasks, fragmented systems, and worried about cash flow, payroll, vendors, or even business survival.

Consider how different clients approach AP and how their AP process affects your advisory impact:

- **Client A: Manual AP:** Even though this client has automated parts of its AP, you still spend hours painstakingly gathering data to piece together bills, vendor records, and payment histories because AP and the accounting platform are not linked. Instead of providing strategic guidance, you're on a scavenger hunt for information. Next month, the cycle repeats. You'd love to provide this client with insights into

cash flow or advise them on how to improve financial stability, but you're too busy playing detective.

- **Client B: Automated AI-powered AP:** Since this client's AP and accounting platform are automated and integrated, digital records with line-item details and payments are automatically reflected in the books. You now have real-time AP aging and cash flow insights. You don't waste time chasing data and use that time savings to advise your client about timing vendor payments, optimizing payroll, and planning capital purchases, ultimately strengthening your relationship with the client and building their confidence in your advisory capabilities.

Clients like Client B aren't just improving efficiency by modernizing and automating AP; they are opening the door to making better financial decisions and growing their business. In a competitive marketplace you're now in the position to differentiate your firm and help them seize those opportunities.



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— Juliana Berger,
Director of Product Management,
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How AI-Powered Bill Pay Improves Speed, Accuracy, and Cash Visibility

Cash flow is the beating heart of every business, especially for small and mid-sized firms, impacting everything from payroll timing to vendor relationships and even financial stability. Visibility into cash flows requires clean, updated data that is nearly impossible to piece together with scattered bills, vendor records, and 1099s. AI-powered bill pay brings data together in a single platform. AI ingests and pays bills, creating a digital record and taking manual entry out of the picture.

Because payments data is centralized in a single platform, clients have more control over when payments are released and who can authorize a payment. Payments are approved faster and approval workflows ensure payments aren't delayed.

For advisors, AI-powered AP, like QuickBooks Bill Pay, provides end-to-end bill payment visibility and access to real-time insights you can use to help clients manage cash flows. Reconciliation is faster and more efficient since all AP data is available through the accounting platform. With visibility into actual cashflows, you can spot danger zones and proactively advise clients.

How to Turn AP Automation into an Advisory Opportunity

Once you identify those clients that are managing AP manually, reach out and offer them a standardized automated bill pay solution as part of your core offering.

"The biggest roadblocks to AP automation are disconnected systems, concerns about maintaining control, and the realities of change management," said Gilad Uziely,

Director of Product Management at QuickBooks. "Many businesses use fragmented tools for bill capture, approvals, payments, and accounting, which leads to duplicate data entry, delayed reconciliation, and limited cash flow visibility. [QuickBooks Bill Pay](#) is built directly into QuickBooks, so bills, approvals, payments, and reconciliation happen in one integrated system. AI-powered bill ingestion, automatic transaction matching, and real-time visibility streamline monthly close and reduce errors. With customizable approval workflows and role-based permissions, firms maintain strong oversight while

improving efficiency. By simplifying implementation and supporting flexible payment options, we make the move to automated bill pay seamless—so firms can shift from processing transactions to delivering higher-value advisory insights."

You can then leverage automated bill pay to expand your offerings to include higher-value advisory services. Because you're not wasting time and energy tracking down payment data, it's likely that you will be able to take on additional clients and offer them the advisory services that build scalable, sticky client relationships.



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— Gilad Uziely,
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AI-Powered Bill Pay Enables the Future of Advisory

AI-powered AP gives clients—and accounting firms—a complete view of their finances while automating the entire AP process. Solutions like [QuickBooks Bill Pay](#), built directly into QuickBooks, combine AI-powered bill ingestion, automated approvals, payments, and reconciliation in one integrated platform. The result is fewer fires, more strategic cash flow decisions, better vendor timing, and confidence in capital purchases and salary structures.

The future of accounting is client advisory services that help clients stay financially stable while strengthening client relationships and improving retention. Automated AP is a key enabler of CAS and a strategic lever that supports advisory growth.

About Intuit QuickBooks

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