



Unlocking time, cash flow, and visibility

QuickBooks Online + QuickBooks Payments + QuickBooks Bill Pay
is a win-win-win for UHY and its clients



When our clients hit the 90-day mark live on these products, they often express ‘why didn’t we do this sooner?’

—Brad Belesky, Software Solutions Senior, UHY

UHY, a top-30 US firm, is part of one of the largest accounting, tax, and consulting networks in the world. Dedicated to serving clients ranging from the dynamic middle-market to Fortune 500 companies, UHY believes the key to growth is a strong entrepreneurial mindset.

Client Accounting Services (CAS) at UHY has been its fastest-growing practice. One part of the practice focuses on training, tech, and the latest software, and other members of the team get to know these tools and sets up clients’ workflows. A sizable area of UHY’s growth has been mid-sized clients earning \$5–50MM who struggle with staffing and retaining employees.

The firm estimates that more than 80% of their CAS clients use QuickBooks Online solutions. They’ve seen that by integrating QuickBooks Payments and Bill Pay with QuickBooks Online, their accountants can create seamless, all-in-one money movement solutions for each client—no matter their size. In addition to streamlining clients’ AR & AP, they’ve found the power of combining these products actually goes beyond that.

Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.

As an independent member of UHY International and one of the largest accounting firms in the US, UHY calls upon vast, multi-industry experience to provide each client with a 360-degree view of their business.

Locations: 42 offices across the US

In business since: 1986

Verticals: Construction
Technology
NFP
Automotive
Energy
Financial institutions
Government
Healthcare
Manufacturing & distribution

Number of staff: Over 1,800 associates across 14 states

Products used: QuickBooks Online Advanced
QuickBooks Bill Pay
QuickBooks Payments
QuickBooks Online Payroll



QuickBooks Bill Pay has been a great solution for our clients whether they are a small business or a large organization. I see how it can have a great impact on their day-to-day.

—Brad Belesky, Software Solutions Senior, UHY

Shifting teams' focus from data-entry to data review

Brad Belesky, Software Solutions Senior at UHY, had been very familiar with the pitfalls of manual AP/AR processes. That's why they count on QuickBooks Online, Payments, and Bill Pay. "Now, that bill that might've taken 2 to 3 weeks to go through our manual process is getting put in the system in a day or two."



With QuickBooks Bill Pay, UHY clients can automate more of their AP processes with features like multi-step bill approval workflows.** With Payments, they can offer customers more ways to pay and promote cash flow with automated reminders. And along the way, QuickBooks Online automatically reflects the money in and money out.**

Since clients' AR & AP transactions are effortlessly reconciled, UHY teams avoid manual work and unlock a more accurate, holistic view into clients' cash flow.



Whether [it's with] a small business owner or the board member of a large organization, cash flow reporting is a topic that we always discuss.

—Brad Belesky, Software Solutions Senior, UHY

By implementing a combination of QuickBooks Online, Payments, and Bill Pay, UHY gives clients a complete picture of their cash flow to add value in their decision-making.

- **Smart, flexible ways to get paid**
UHY provides clients with competitive processing rates, more ways for customers to pay, and tools like automated reminders to keep cash flowing.**
- **Accounts payable automation**
UHY teams add efficiency to AP workflows by generating bills from vendor invoices, paying multiple vendors at a time, and combining multiple bills into one payment.
- **Simplified, integrated workflows**
UHY facilitates business decisions for their clients based on auto-reconciled transaction data and cash flow forecasts of up to 90 days in advance.
- **Capacity for higher-value services**
This suite of solutions helps UHY save billable hours and avoid errors with workflows facilitating transaction review rather than requiring cleanup. UHY also saves onboarding and training time by moving more clients to one standardized system.



QuickBooks + Payments + Bill Pay: The all-in-one money movement solution that unlocks real-time cash flow insights

UHY understands that efficient, automatic AR/AP workflows can be game-changing for clients. That's why they prefer to set up new CAS clients with QuickBooks, Payments, and Bill Pay on day one. They recommend this suite of products because they provide more ways to get paid, more flexibility to create and pay bills, and automated workflows to efficiently move money in and out. Transactions are matched and appear in QuickBooks, empowering UHY and its clients with real-time cash flow insights to inform nimble business decisions.

By the same token, UHY knows that as more clients use QuickBooks products, they can more easily onboard new team members, provide them vast access to training resources, create more opportunities for higher-value services, and maximize billable hours. With the benefits these 3 products mean for clients, the firm, and its accountants, they're a win-win-win.



Cash flow is the lifeblood of every business—but especially for...mid-sized businesses, cash flow is everything.

—Brad Belesky, Software Solutions Senior, UHY



Let's be honest. In this economy, you need those real-time insights to make decisions. Having clean reconciliations to go back on saves everyone time and allows the business to focus on their priorities. Leave it to the accountants to focus on the numbers, and you'll have a smoother operation in general.

—Brad Belesky, Software Solutions Senior, UHY

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Important pricing details and product information:

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****Product information**

QuickBooks Payments and QuickBooks Bill Pay: QuickBooks Payments and QuickBooks Bill Pay accounts are subject to eligibility criteria, credit, and application approval. Subscription to QuickBooks Online required. Not available in U.S. territories or outside the U.S.

****Features**

User Roles and Approval Workflows: Available in QuickBooks Bill Pay Elite or QuickBooks Online Advanced. Not available for QuickBooks Online Simple Start customers.

Automatic matching: QuickBooks Online will only match bank deposits with transactions processed through QuickBooks Payments and match bank withdrawals with transactions processed through QuickBooks Bill Pay. Not all transactions are eligible.

Terms, conditions, pricing, special features, and service and support options subject to change without notice.