



Innovate. Advise. Grow.
Stop Processing.
Start Advising.

AP Automation that Powers Advisory Growth Without Complexity

Trusted by CAS practices across the US · Top ERP ecosystems · AI-powered capture & coding
Your clients expect insight, strategy, and measurable impact, not just bookkeeping. Yooz makes that shift possible. By automating AP and standardizing workflows, your team can focus on what creates real value: forward-looking advisory work that strengthens every client relationship and delivers the benefits of Lean Financial Operations.

Why CAS Practices Partner with Yooz

Unlock advisory capability

Automate capture, coding, approvals, and posting.
Free your team to deliver higher-value advisory work without adding headcount.

Standardize across clients

Deliver a consistent service model across all your engagements.
No one-off processes, no rework when a new ERP shows up.

Real-time financial visibility

Access up-to-date insight into cash flow, spend, and risk.
Have more proactive, confident conversations with every client.

AI-powered accuracy

Intelligent data extraction reduces errors at the source.
As a result, downstream reporting and analysis are reliable from the start.

Integrates with
the systems your
clients already use

 **Acumatica**
The Cloud ERP

 **intuit quickbooks**

 **Microsoft**

 **ORACLE NetSuite**

 **Sage**

245+ more ERPs

Power Every CAS Engagement

Cash flow forecasting

Real-time payables visibility replaces delayed reporting with a clear, current view of cash position.

Budgeting and planning

Monitor budgets dynamically, catch variances early, and keep clients aligned to their financial goals.

Tax planning

Clean, structured data enables proactive planning instead of last-minute year-end pressure.

Business valuations

Audit-ready financials with strong controls give you solid ground for every valuation engagement.

Technology advisor

Prebuilt integrations deploy in days. No complex IT effort or system replacement required.

Industry benchmarking

Standardized data enables meaningful, consistent performance comparisons across your client portfolio.

The Yooz CAS Advantage



Expand advisory offerings



Increase recurring revenue



Improve staff productivity



Strengthen client relationships



Accelerate client onboarding



Scale with confidence

Turn automation into advisory value with Yooz.

Forward-thinking CAS firms use Yooz to transform AP from a back-office function into a financial control hub that drives growth and enables scalable advisory practices.

Connect with your Partner Account Manager today

Contact Us



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