

## Discovering the Time-Savings of Automated Payments with OfficeTools + APX



As any busy accounting professional knows all too well, billing, invoicing and processing payments, not to mention chasing down late payments, can take a significant amount of time – precious time that today’s CPAs just don’t have to spare.

Jessica Bonin, founder, partner and CPA at Bonin Kaster Souder, a CPA firm in Eugene, Oregon, is well aware of this. The firm was founded a decade ago, and today offers customized tax and accounting services for a wide range of clients, including payroll and bookkeeping services for business clients, with a primary focus on tax return preparation and planning.

Automated payments weren’t always possible in the last 10 years of serving clients, but now the firm can offer the option thanks to implementing OfficeTools with Abacus Payment Exchange (APX) from AbacusNext, which enables automation. Recurring payments were something the firm very much wanted to be able to incorporate into its workflows.

“It definitely saves us time,” Bonin says.

### Making the Switch to OfficeTools + APX

Before activating APX, the firm previously used QuickBooks for billing and payments processes. The firm made the switch from QuickBooks to APX given the convenience of having everything integrated into a single system. Utilizing the same system where projects are managed for billing and payments just made sense.

For the past two years, Bonin Kaster Souder has been using OfficeTools, mostly on the project management side. However, when AbacusNext introduced a recurring payment feature, the firm was eager to apply it and APX’s auto-pay feature.

### At a Glance

#### About Bonin Kaster Souder

A CPA firm in Eugene, Oregon. The firm was founded a decade ago, and today offers customized tax and accounting services for a wide range of clients, including payroll and bookkeeping services for business clients, with a primary focus on tax return preparation and planning.

“It definitely saves us time.”

Jessica Bonin,  
Founder & Partner

“Now that we have the recurrent payments, it definitely saves a significant amount of time,” says Bonin. Just how much time? She estimates that using APX, and particularly the ability to process recurring payments, saves the firm an hour a month just on billing.

Let’s be honest: switching technologies at any busy organization can be a daunting prospect. Sometimes, though, it’s just the logical answer.

Bonin Kaster Souder has a sizable roster of clients to manage. On average, the firm handles recurring monthly bills on behalf of approximately 150 to 200 clients. When the recurring payments feature became available in APX, life became easier. Now, all those clients have been put on auto-pay through APX.

## How Automated Payments with APX Saves the Firm Time

Sometimes firms have to find ways to incentivize clients reluctant to make the switch to automated or recurring payments or both. Fortunately, that was not the case for Bonin Kaster Souder.

The firm had always required recurring billing for all clients that had monthly recurring services such as payroll and bookkeeping, even before it was using OfficeTools and APX. That meant no drastic changes in processes or pushback from clients when the firm implemented APX.

The reason for this requirement was twofold: it saves time, and it significantly reduces collections. No firm wants to spend valuable hours chasing down unpaid invoices.



**Things are also faster when you can eliminate the tedious collections issue, as well as the time-consuming process of having to go through and individually charge each person each month.**

“I’ve always required recurring, automatic payments so we don’t have to deal with collections issues,” Bonin says. As she explains, the entire process of collections requires a significant investment of time that busy accountants simply don’t have to spare. Therefore, the ability to continue requiring clients to agree to automatic, recurring payments after Bonin Kaster Souder made the switch from QuickBooks to APX directly aligned with the firm’s billing goals and needs.

So would Bonin recommend implementing automatic payments to other firms that might be considering it? Yes.

“Once automatic payments are set up, it saves quite a bit of time,” Bonin says. “Things are also faster when you can eliminate the tedious collections issue, as well as the time-consuming process of having to go through and individually charge each person each month.”

Put simply, “it definitely saves us time,” she concludes. That’s something every busy accounting professional and CPA firm can appreciate.

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