Autobooks offers simple, self-service enrollment online. To get started, a user simply navigates to the Autobooks portion of online banking.

ENROLLMENT TAKEAWAYS:

- » Businesses can self-service online 24 hours a day, 365 days a year.
- » The business owner will click on Autobooks within Online Business Banking.
- » Then go to "Invoicing and Payments" menu option to view the Autobooks link.

ank Financial		
Accounts Move Money Additional Services Reports Bi	II Pay Invoicing and Payments	
		Last Visit May 1
Accounts Transfer	My Approvals	Contact/Messages
Tax ID	All requests	Customer Service Hours
▼ DEPOSIT ACCOUNTS \$141,392.81		Mon - Fri 9:00am - 6:00pm Sat. 9:00am - 2:00pm
Small Business Int Checki * 0000 Quick peek		Toll Free
Available **\$1,872.88	You have no approval requests	800.894.6900
Current \$1,872.88		
Spectrum Business Mone * 0001 Quick peek		
Available **\$139,519.93		May 2023
Current \$139,519.93		Su Mo Iu We Ih Fr
		30 1 2 3 4 5
**This balance reflects the funds available for withdrawal in cash and		7 8 9 10 11 12
to pay items presented against your account. This balance does not include any Overdraft Protection that may be attached to your account.		14 15 16 17 18 19
		21 22 23 24 25 26

CHECK OUT THE STEP-BY-STEP ENROLLMENT PROCESS BELOW.

Step I:

» Once the business owner will click on Autobooks within Online Banking.

The Terms and Conditions will display and allow the user to select which checking account they wish to deposit funds (if the user has more than one checking account with the financial institution).

» Autobooks Terms and Conditions must be accepted to enroll.

» NOTE: The background of this screen has been blurred intentionally to the user.





Step 2:

» The user will be taken to a short tutorial. They can choose to create an invoice or access their payment form.



Step 3:

» Once the user completes the tutorial If Autobooks is missing key data for the business, we will ask for the information now.

Key data is: The owner name, phone number, date of birth, SSN, or home address of the business and/or business owner.





Step 4:

» User will see a confirmation once the key data has been entered. The user may click away from the key data gathering modal at any time before completion. If the user does click away, there will be a persistent (clickable) reminder message that key data is required for payment processing approval. The business cannot process their first payment without providing this information.



Step 5:

» The user will first access the "lite" version of Autobooks. This version will show the full Invoicing and Payment Form functionality, with all other Autobooks traditional tabs repressed. The user can stay with the lite version (at no monthly subscription fee) OR they may upgrade to add accounting/reporting features for a monthly fee.

Missing Info Core									
	Invoices Invoice Schedule:	s Estimates Customers	Payments Products/S	Services Invoice	Settings Reporting/Account				
Payment Form									
Accounting									
Search criteria ~									
	Name Status	Invoice #	Due Date	Total	Balance due				
	Kim Reher Due	9213277	4/28/2022	\$20.00	\$20.00				
0	Rows per page: 25 👻			1-1 of 1	< >				
Support									

Once complete, users can upgrade their Autobooks experience with additional features!

To add Accounting, Reporting and other features the business owner must click the tab labeled "Accounting" within the Lite version. They will see monthly subscription and processing rate information, and click "Activate Autobooks" to complete their upgrade. Once activated, the business owner will see the traditional Autobooks view!



Mis: Prov	sing Info Core vider Mock						
8	Dashboard	Customer payments Vendor paym	nents				
	Invoicing	Incoming normanta	Coming due	Deat due	-	Customer payment totals	
	Payment Form	\$0.00	\$20.00	\$0.00	0	Month-to-date	\$0.00
\$	Pay Bills		+====				50.00
11.	Accounting					Year-to-date	\$0.00
=	Reporta	Payment Form		Learn more about	at Payment Form	Total cash	
懲	Settings	Send this link to customers to allow them to pay online:			Checking & More (*1234)	\$110.00	
0	Need Help?	https://dev.autobooks.co/pay/missing-info-core-provider-mock-391 Copy			Free & Simple Checking (*2345)	\$220.00	
Z	Mobile View						
		Summary of last month	h's invoicing activity				
		You have sent \$0.00 in invoices. When you send an invoice, it will be pa					
			Load more				
6	Support						•

For support, contact Autobooks Customer Service at (866) 617-3122 or via email at <u>Support@A</u>utobooks.co.