

Autobooks & Elavon Self-Service Enrollment

Autobooks has partnered with Elavon to offer simple, self-service enrollment online. To get started, a user simply accesses Autobooks within their **online banking**.

ENROLLMENT TAKEAWAYS:

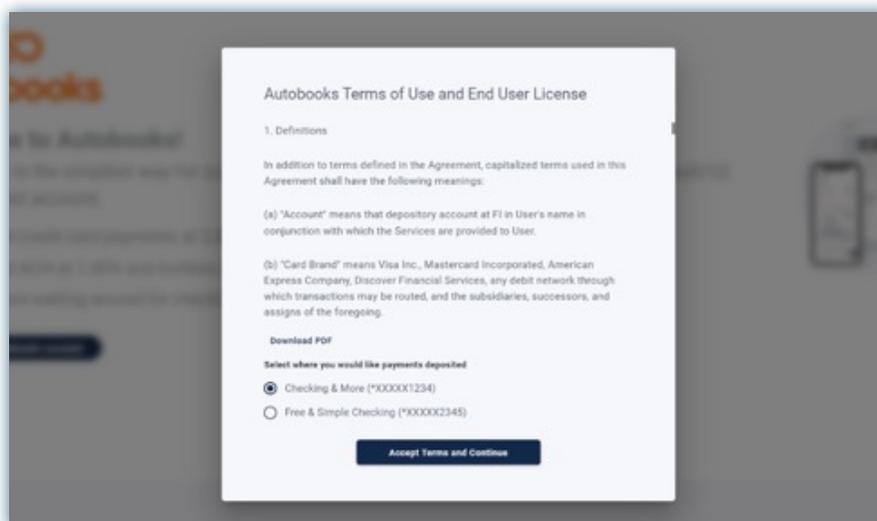
- » Businesses can self-service online **24 hours** a day, **365 days** a year
- » Clicking the Autobooks link **does not** automatically enroll a business
- » Two-Step Enrollment process for ACH Payments, Invoicing and Payments

Check out the enrollment process below:

Step 1:

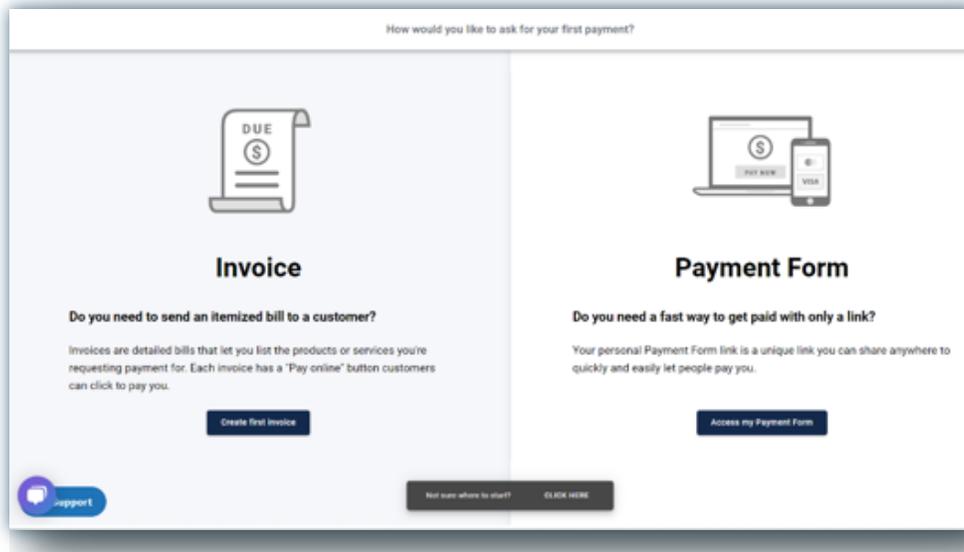
- » The user will click on an Autobooks link from their **online banking platform**. The Terms and Conditions modal will display and allow the user to select which **checking account** they wish to deposit funds (if the user has more than one checking account with the financial institution).

Note: A soft credit check is pulled upon enrollment.



Step 2:

» The user will be taken directly to **First Time Invoicing** or **First Time Payment Form**.

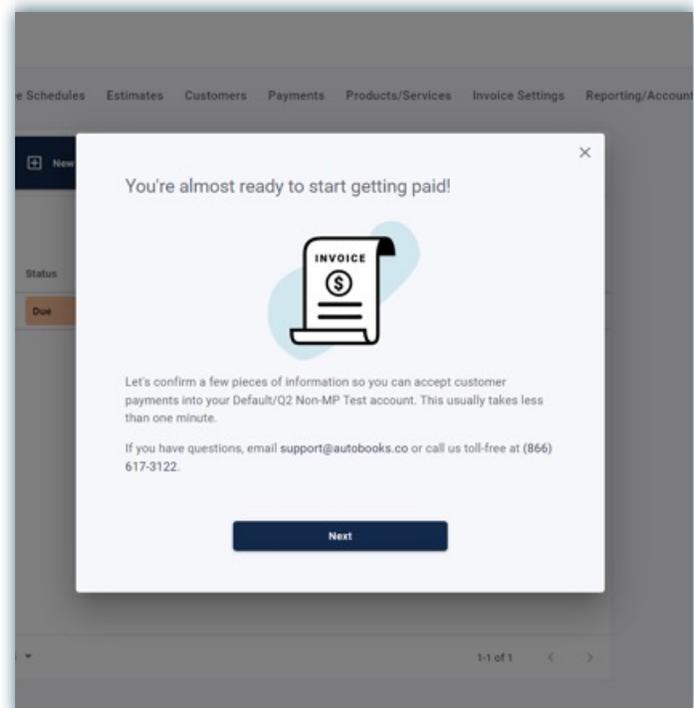


Step 3:

» Once the user completes FIT or FTF, they will see **Invoicing and Payments**. If any key data is missing to approve the SMB for ACH payment processing, a modal will display **asking for the required data**.

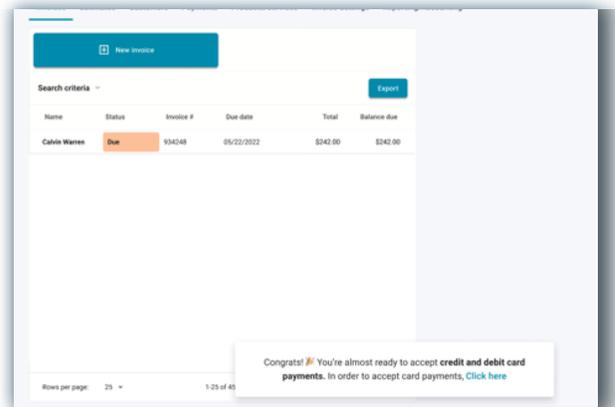
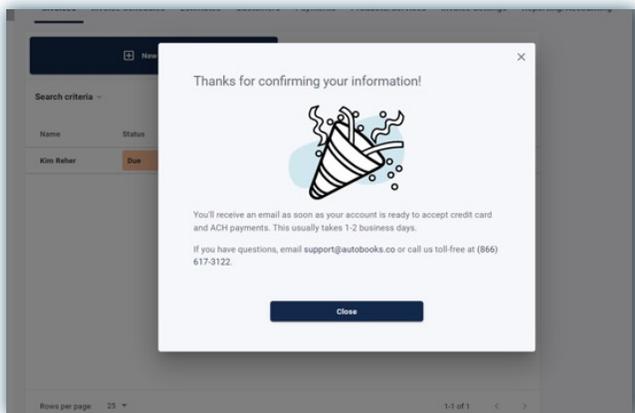
» Key Data for ACH Approval:

-SMB Full Name, Phone Number, date of birth, SSN, and home address.



Step 4:

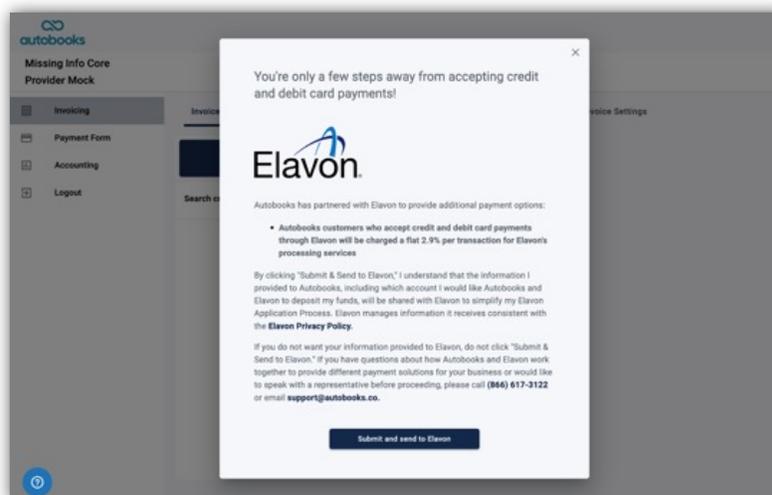
» User will see a **confirmation** once the key data has been entered. The user may click away from the key data gathering modal at any time before completion. If the user **does click away**, there will be a persistent (clickable) reminder message that key data is required for **ACH payment processing approval**.



» The user will be able to see Invoicing and Payment Form.

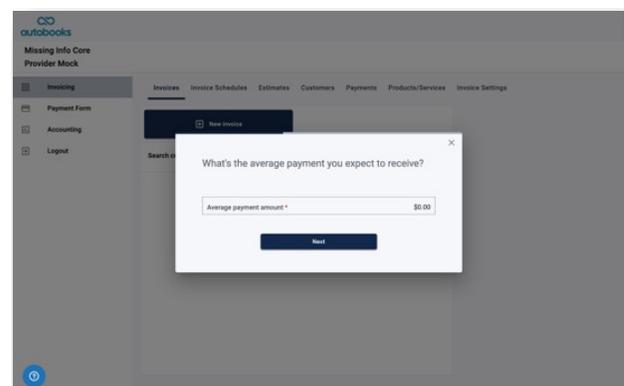
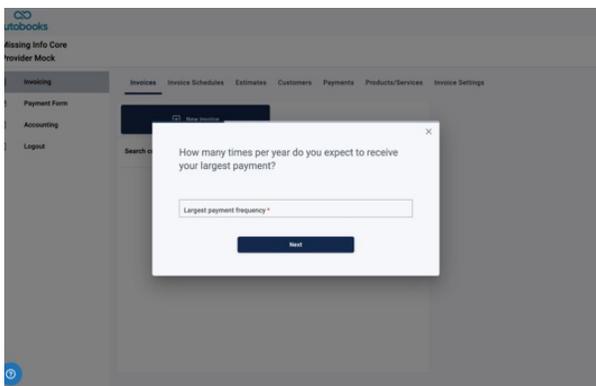
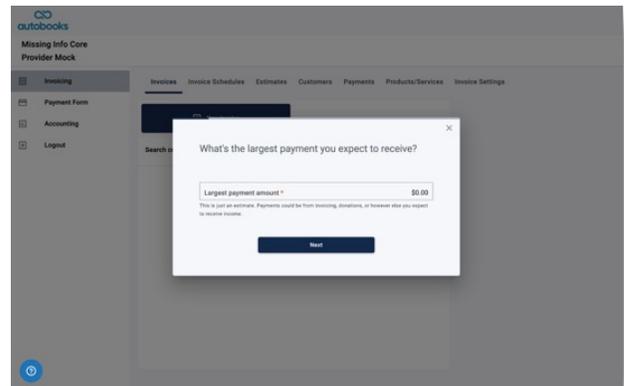
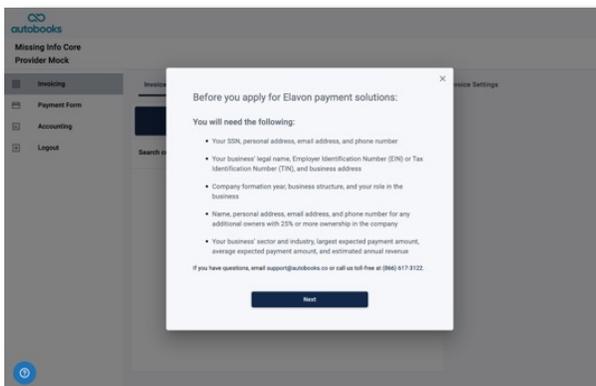
The user will also see a **persistent message** at the bottom of the screen inviting them to take action in order to accept credit and debit card payments.

ONCE THE USER CLICKS THIS MESSAGE, THE ELAVON REQUIRED ENROLLMENT STEPS WILL DISPLAY.



ELAVON APPLICATION:

- » The steps to complete the **Elavon Application** will display.
- » The SMB will be asked to answer questions regarding their **anticipated payment activity**.



»Next, the user will answer business information questions.

The screenshot shows the 'Missing Info Core Provider Mock' interface. A modal window is open with the title 'What type of industry does your business operate in?'. It contains two dropdown menus: 'Sector *' and 'Industry *'. Below the 'Industry *' dropdown, there is a small text prompt: 'Please select a Sector'. A 'Next' button is located at the bottom of the modal.

The screenshot shows the 'New Invoice' screen. A modal window is open with the title 'What's your company DBA?'. It features a text input field labeled 'Company DBA *'. A 'Next' button is positioned at the bottom of the modal.

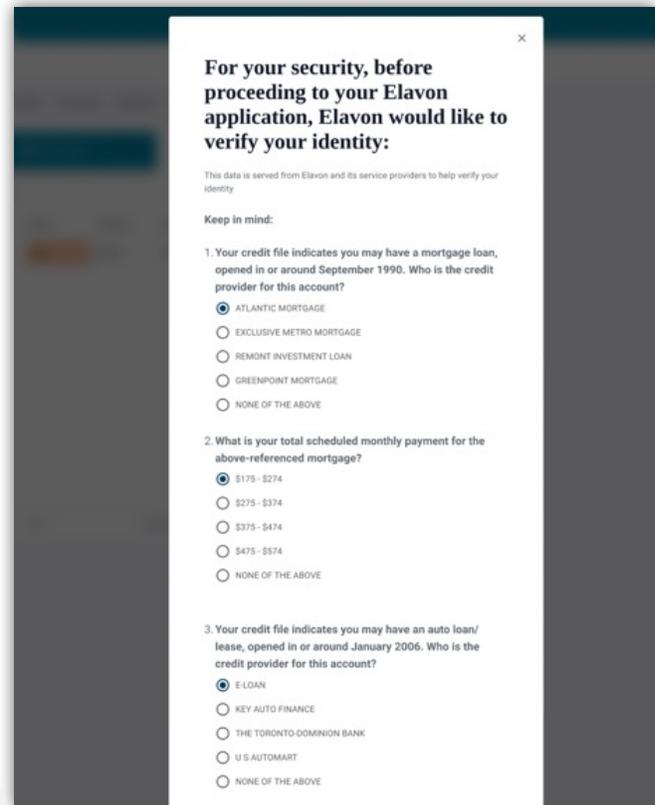
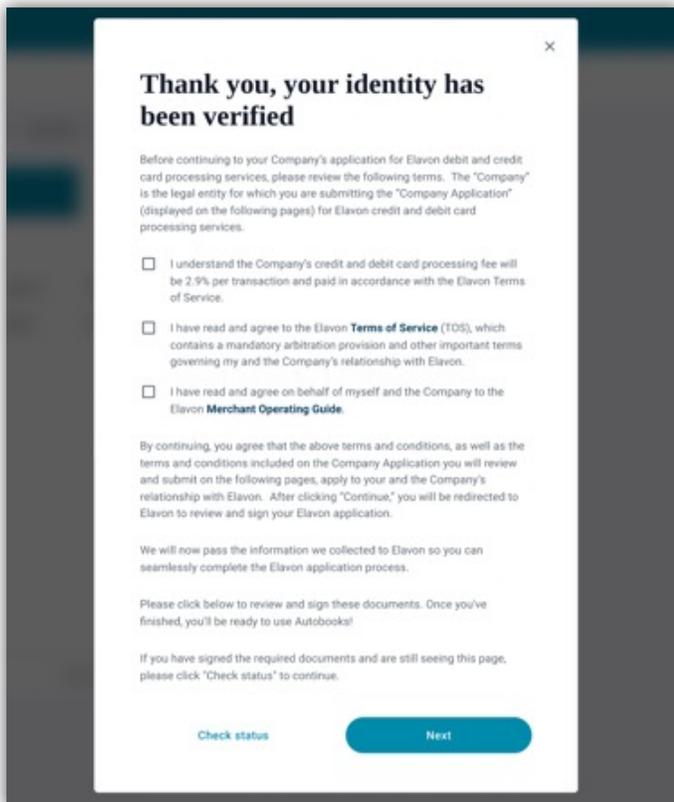
The screenshot shows the 'New Invoice' screen. A modal window is open with the title 'What's products or services do you sell?'. It contains a text input field labeled 'Products/Services sold *'. A 'Next' button is located at the bottom of the modal.

The screenshot shows the 'New Invoice' screen. A modal window is open with the title 'What's your business title?'. It includes two dropdown menus: 'Structure *' and 'Title *'. Below the 'Structure *' dropdown, there is a small text prompt: 'Please select a Structure'. A 'Next' button is at the bottom of the modal.

The screenshot shows the 'New Invoice' screen. A modal window is open with the title 'What's your EIN (Employer Identification Number)?'. It features a text input field labeled 'EIN / TIN *'. A 'Complete' button is located at the bottom of the modal.

Verifying Identity:

» The user will answer identity questions generated by Elavon. Elavon pulls a credit report on the business owner and uses information from the report for these questions.



» Once the user's identity is verified, the user must consent to Elavon's Terms and Conditions and e-sign all of Elavon's consent forms.

» The user will see a **confirmation** that their credit card processing application is complete. The user will click “Close” and return to Invoicing and Payment Form.

*By signing this document below you are agreeing on behalf of the Company to a mandatory binding arbitration provision set forth in the TOS and expressly incorporated herein.

**The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

I hereby certify that to the best of my knowledge, the information provided about me, the name and address provided for the above named Company, and the information provided about the beneficial owner(s) and/or the individual with control over the above named Company is complete and correct.

Printed Name	Test Data Test Data	Date
Signature		

Signature _____ [← CLICK TO SIGN](#)

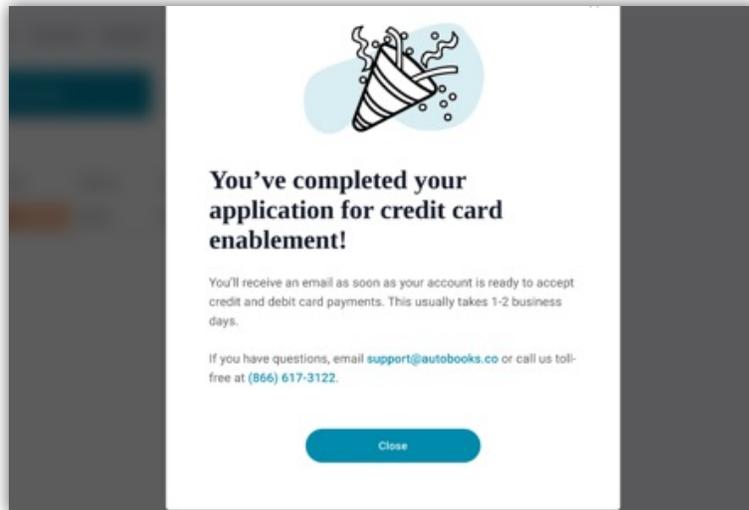
Personal Guaranty

Personal Guaranty

As a primary inducement to us to accept this Company Application, the undersigned Guarantor(s), by signing the Company Application, jointly and severally, unconditionally and irrevocably, guarantees the continuing full and faithful performance and payment by Company of each of its duties and obligations to us (including, without limitation, Chargebacks and obligations in connection with Leased Equipment, if applicable) pursuant to the Company Application and Agreement, as may be amended from time to time, with or without notice. Guarantor(s) understand further that we may proceed directly against Guarantor(s) without first exhausting our remedies against any other person or entity responsible therefore to them or any security held by us or Company. This guarantee will not be discharged or affected by the death of the Guarantors, will bind all heirs, administrators, representatives and assigns and may be enforced by or for the benefit of any of our successors. Guarantor(s) understand that the inducement to us to accept this Company Application is consideration for the guaranty and that this guaranty remains in full force and effect even if the Guarantor(s) receive no additional benefit from the guaranty. The undersigned hereby directs any consumer reporting agency to furnish a consumer credit report that relates personally to the undersigned upon the request of Elavon or any of its designees, successors or assigns and agrees that all parties involved are in compliance with the Fair Credit Reporting Act. If leasing equipment, Company understands they are personally responsible for making all monthly payments due under the lease and that any failure to pay all amounts when due may result in additional charges, potential damage to my credit rating and/or legal action against me to collect both past and future payments owed under the lease.

Printed Name	Test Data Test Data	SSN#	***-**-6789
Signature		Date	06/24/2021

Signature _____ [← CLICK TO SIGN](#)



To add Accounting, Reporting and other features:

» The SMB must click the tab labeled **“Accounting”**. This tab will provide the SMB with **clear subscription and processing rate information**, with a call-to-action to Activate Autobooks.

» Once activated, the SMB will see the traditional full **Autobooks view**.

