# 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.

| ooks   | Autobooks Terms of Use and End User License  |                       |   |
|--|--|-----------------------|---|
|  |  |                       |   |
| in Automotive"   | 1. Definitions   |                       |   |
| the survey of the local division of the loca | In addition to terms defined in the Agreement, capitalized terms used in this  | and the second second | - |
| _  | Agreement shall have the following meanings.   |                       |   |
|  | (a) 'Account' means that depository account at FI in User's name in  |                       |   |
|  | conjunction with which the services are provided to user.  |                       |   |
| the local sectors in   | (b) "Card Brand" means Visa Inc., Mastercard Incorporated, American  |                       |   |
|  | Express Company, Discover Financial Services, any debit network through<br>which transactions may be routed, and the subsidiaries, successors, and |                       |   |
|  | assigns of the foregoing.  |                       |   |
|  | Download PDF   |                       |   |
|  | Select where you would like payments deposited   |                       |   |
|  | Checking & More (*000001234)   |                       |   |
|  | Free & Simple Checking (%000002345)  |                       |   |
|  |  |                       |   |
|  | Accept ferms and Continue  |                       |   |



#### <u>Step 2:</u>

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



#### <u>Step 3:</u>

» Once the user completes FIT or FTPF, 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.



#### <u>Step 4:</u>

» 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.





### **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.

#### For your security, before proceeding to your Elavon application, Elavon would like to verify your identity:

This data is served from Elavon and its service providers to help verify your identity

#### Keep in mind:

 Your credit file indicates you may have a mortgage loan, opened in or around September 1990. Who is the credit provider for this account?
O ATLANTIC MORTGAGE
EXCLUSIVE METRIO MORTGAGE
REMONT BAYESTMENT LOAN
GREENPOINT MORTGAGE
NONE OF THE ABOVE
What is your total scheduled monthly payment for the

above-referenced mortgage? \$175-\$274 \$275-\$374 \$375-\$474 \$475-\$574

O NONE OF THE ABOVE

### Thank you, your identity has been verified

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Before continuing to your Company's application for Elavon debit and credit card processing services, please review the following terms. The "Company" is the legal entity for which you are submitting the "Company Application" (displayed on the following pages) for Elavon credit and debit card processing services.

- I understand the Company's credit and debit card processing fee will be 2.9% per transaction and paid in accordance with the Elavon Terms of Service.
- I have read and agree to the Elavon Terms of Service (TOS), which contains a mandatory arbitration provision and other important terms governing my and the Company's relationship with Elavon.
- I have read and agree on behalf of myself and the Company to the Elavon Merchant Operating Guide.

By continuing, you agree that the above terms and conditions, as well as the terms and conditions included on the Company Application you will review and submit on the following pages, apply to your and the Company's relationship with Elavon. After clicking "Continue," you will be redirected to Elavon to review and sign your Elavon application.

We will now pass the information we collected to Elavon so you can seamlessly complete the Elavon application process.

Please click below to review and sign these documents. Once you've finished, you'll be ready to use Autobooks!

If you have signed the required documents and are still seeing this page, please click "Check status" to continue. » 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.

Check status

» 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.

| I hereby certify that to the best of my knowledge, the information provided about 1<br>and the information provided about the beneficial cener(s) and/or the individual w  | ns, the name and address provided for the above named Company,<br>th control over the above named Company is compilete and correct.   |
|--|---|
| Printed Name Test Data Test Data<br>Signature  | Date  |
| Signature  | < CLICK TO SIGN   |
| Personal Guaranty  |   |
|  |   |
| Personal Guaranty  |   |
| Personal Guaranty<br>As a primary inducement to us to accept the Company Application, the undersigned Du<br>roomditionally and intervicuality, guarantee the continuing full and half-ful performance a<br>production, without instatus, Chargebasika and obligations in connection with Leased E<br>Approximation, as may be amended from time to three, with on which notice. Chargebasika<br>into its doctarget or affective to the observed to the Company and the full performance<br>into the doctarget or affective to the observed on the Company and the full<br>main of any of our successors. Guarantoolity understand that the inducement to a site<br>that this generative memories in table more and effective on the document of persons and the<br>successors or assigns and argues that all periods index of the person of the the<br>successor or assigns and argues that all periods index on equilation and the index of the lease and the<br>charges, potential domage to mainting all monthly cogments due under the lease and the<br>charges, potential domage to maintee index of the documents and incompanies on the full<br>periods Name. The Data Text Data  | animitardy, by signing the Cumpany Application, juntly and severally,<br>ind payment by Company of each of its duties and obligations to us<br>palament, a regulatable parware to the Cumpany Application and<br>solventrad further that see may proceed directly against Guarantinot at<br>balance. Any several the second several against Guarantinot at<br>balance. Any several these and a solven and the solven at<br>solven to the original second several the solven at<br>solven to the solven any second several the solven at<br>solven to the solven any second several the solven any<br>the undersuperatury balance against fill Guarantinot the<br>the parametry set. If leases graphenes, Company understands they<br>are tablen to pay all amounts when due may result in additional<br>with undersuperature against several company understands they<br>are tablen to pay all amounts when due may result in additional<br>with and future payments ound under the lease.  |
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### 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 callto-action to Activate Autobooks.

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



