



Financial Institution Training Guide for **Banno Invoicing & Payment Acceptance Plugins, Powered by Autobooks**

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GREAT NEWS!

Your digital banking channels now include two new features that are highly coveted by small businesses (SMBs) and non-profits. Two features that will help them accept online or in-app payments directly from their customers — without having to use a third-party app.

Business owners can now enroll online in minutes and:

Send Invoices: easily create and send electronic invoices that can be paid online.

Accept Payments Now: directly accept online or in-app payments.

It's important that your financial institution is prepared to help make businesses and non-profits aware of these new capabilities for two reasons:

1. Payment acceptance is moving from in-person to online.

The good news — Your financial institution is now able to help businesses make that transition to accepting online payments.

Even better news — It can all be done in minutes directly from your financial institution's online banking channels.

2. Increasingly, businesses are turning to non-bank providers to accept payments.

Up until these features were made available, the only option to accept online or in-app payments for most SMBs and non-profits was to use a non-bank solution.

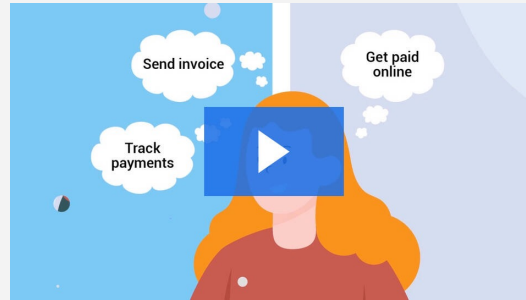
Non-bank solution providers like Square, PayPal, Quickbooks and others have been growing at a rapid rate. Each time a business starts accepting payments through a non-bank solution, they are then offered products and services that directly compete against their financial institution.

The This guide offers pre-built training resources designed to help ensure SMBs and non-profits can continue to adapt and grow, by ensuring your financial institution is prepared to help service and support their evolving needs.

Watch these short videos to learn the perspectives of two real business owners.

Each of them made the transition from accepting in-person payments to online payments directly through their financial institution.

Click the video thumbnails to watch



[🔗 Invoicing with Lauren](#) (video)



[🔗 Accept a Payment with Sophia](#) (video)



Four Step Training Plan

To get started, review our recommended Training Plan. This plan will help you assign our pre-built resources to your organizational needs.

[!\[\]\(e78f798d4ea5c530c9db49e7d26e6b95_img.jpg\) **Banno Recievables Recommended Training Plan** \(PDF\)](#)

Step 1 | Training Webinars

Attend a live Introduction Webinar

hosted by Autobooks, or watch a recorded version on-demand. Attend these free sessions to learn more about the Send Invoices and Accept Payments features now offered by your financial institution.

Attend a live Advanced Webinar

hosted by Autobooks, or watch a recorded version on-demand. Attend these free sessions to learn how to target the right SMB or non-profit client, the benefits they receive by utilizing these new capabilities and how ensure your financial institution drives product enrollment.

Each of the above webinars can be attended by your entire staff, or the content can be used to design your own training curriculum.



Step 2 | Download our Reference Materials

Download our pre-built reference materials to build your internal team training and product documentation. Each of these documents can be stored on your company server for quick reference by your team members.

- [🔗 **Enrollment Guide** \(PDF\)](#)
- [🔗 **Send an Invoice Overview** \(PDF\)](#)
- [🔗 **Accept a Payment Overview** \(PDF\)](#)
- [🔗 **Autobooks Upgrade — Accounting and Reporting Overview** \(PDF\)](#)
- [🔗 **Autobooks Customer Care Team Information** \(PDF\)](#)
- [🔗 **Common Consumer Questions** \(PDF\)](#)
- [🔗 **Explore the New Banno Receivables** \(video\)
\(scroll to the bottom of the page to access\)](#)

Step 3 | Prepare your Go-To-Market Collateral

Making your customers aware of our new features is the key to driving adoption. Click the button below to order **free printed copies** of the General Receivables Flyer, and download our other flyers to help promote adoption and increase deposit activity for your team.

[Banno Receivables Flyer](#) (PDF)

[Order Now »](#)

[Send an Invoice Feature Flyer](#) (PDF)

[Accept a Payment Feature Flyer](#) (PDF)

To promote the new features to your customers via email or through digital banking direct messaging, leverage the pre-built announcement emails below. We recommend sending at least the first two emails.

[Email 1](#)

[Email 2](#)

[Email 3](#)

[Email 4](#)

Step 4 | Time to Go Live

Ensure your FI staff is all on the same page when it's time to launch and send an internal announcement email. Whether you use our words as inspiration, or as the total source material, this step is critical to ensuring your teams are prepared to help educate and train your SMBs and non-profits.

[Internal Announcement Email](#)

For additional information on GTM best practices, please reference our [Go-to-Market Guide](#) (PDF).