



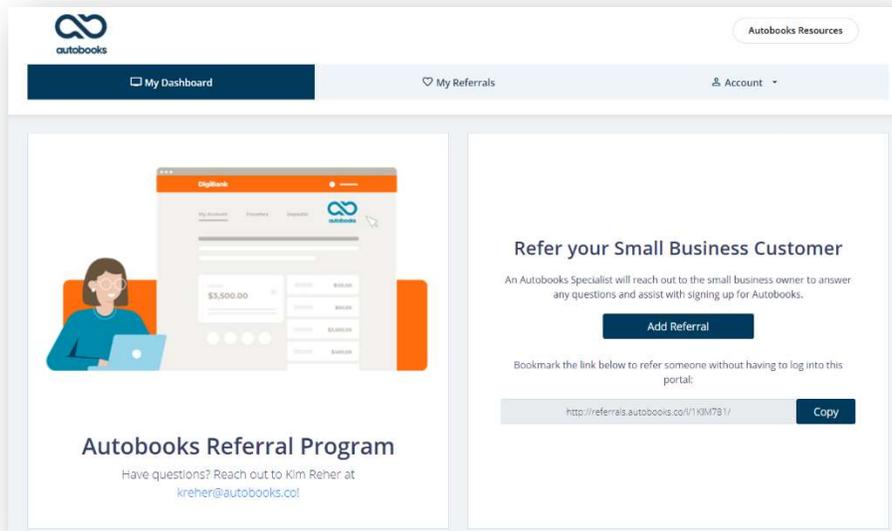
Referral Program



How Autobooks Helps You Drive Enrollments

Autobooks offers a referral program to help you when your customer needs detailed information about our Banno features! Customers that are referred to Autobooks will be contacted by an Autobooks Specialist. We'll take the time to understand your customer's business need, answer their deeper questions, and recommend the Banno feature that's right for them. We treat your customer with the same white glove service you do!

Our Specialists have an 80% success rate in driving enrollments when we connect with customers. We even assist the customer with enrollment...right over the phone.

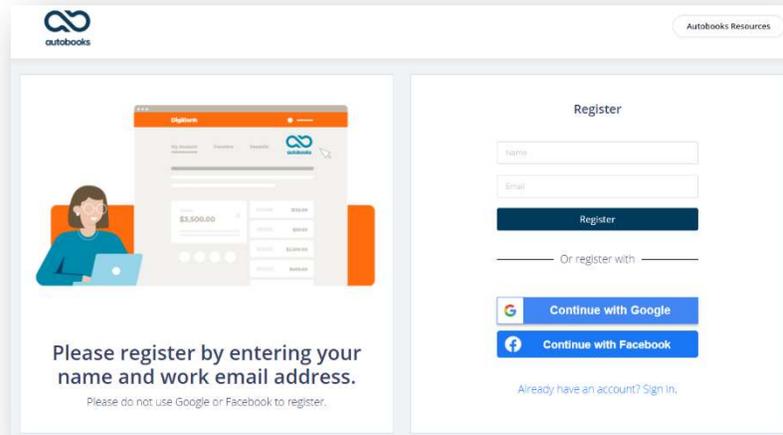


With the Autobooks Referral Program, you'll be able to track the latest activity with your referral...from first contact through first payment received! And tracking the referral activity is self-serve. You'll create login credentials for our Autobooks Referral portal and sign in to see your referral activity in real time.

How to Get Started with the Autobooks Referral Program

You'll need to register for the program. To sign up:

1. Go to <https://autobooks.referralrock.com>. DO NOT register using Google or Facebook...you'll want to use your work information to register so we are able to track your referrals with your employer. Enter your name and your work email address, then click Register.



autobooks

Autobooks Resources

Please register by entering your name and work email address.
Please do not use Google or Facebook to register.

Register

Name

Email

Register

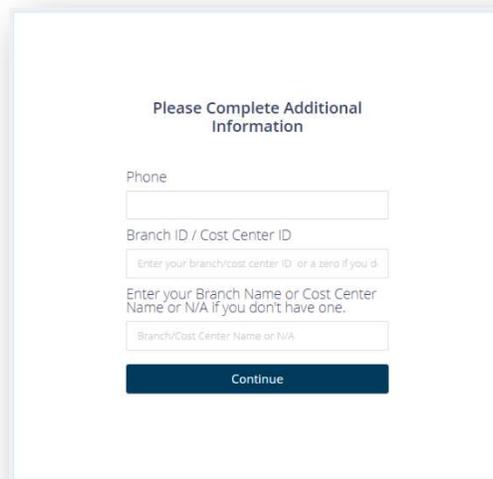
Or register with

Continue with Google

Continue with Facebook

Already have an account? Sign In.

2. Type in your work phone number, your Branch or Cost Center ID, and the name of your branch/cost center (if you don't have a name, type N/A). Click 'Continue'.



Please Complete Additional Information

Phone

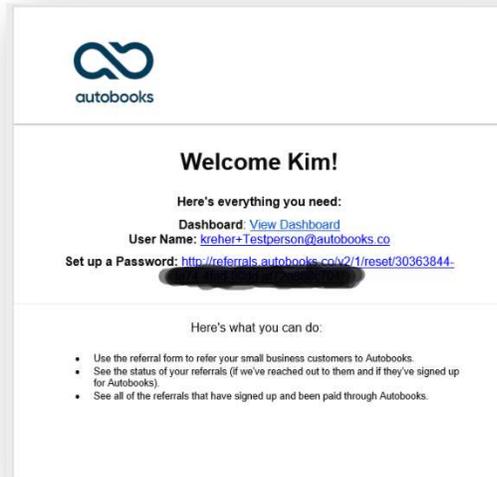
Branch ID / Cost Center ID
Enter your branch/cost center ID or a zero if you do not have one.

Enter your Branch Name or Cost Center Name or N/A if you don't have one.

Branch/Cost Center Name or N/A

Continue

3. You'll see the Autobooks Referral Program Dashboard! Please bookmark this page for future use. You will receive a welcome email from Autobooks that will ask you to establish a password for accessing the program in the future.

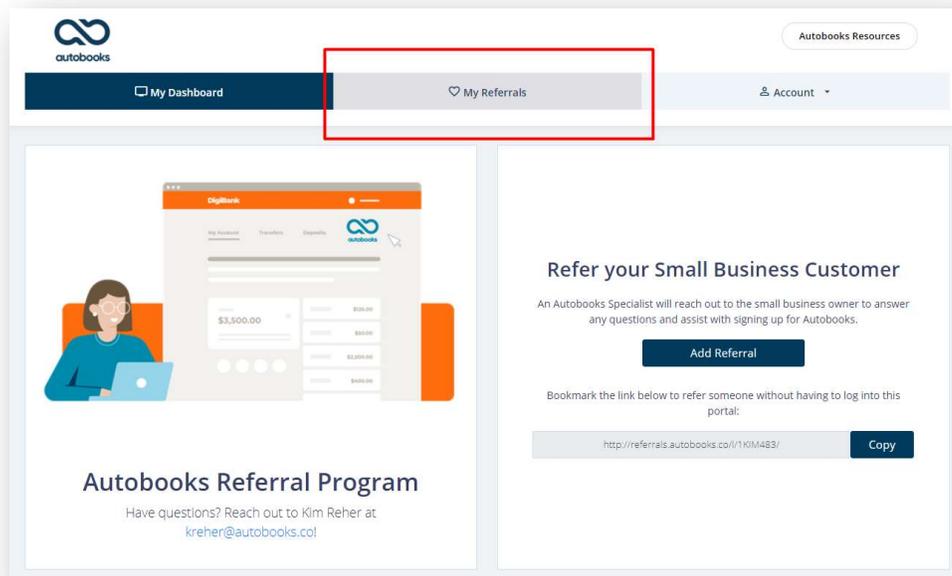


How to Submit a Referral

To submit a referral through your Dashboard, click on 'Add Referral'. Complete your customer's full name, their email address, their phone number, and the name of their business. Add any remarks that you think are important for our Specialist to know for the conversation.

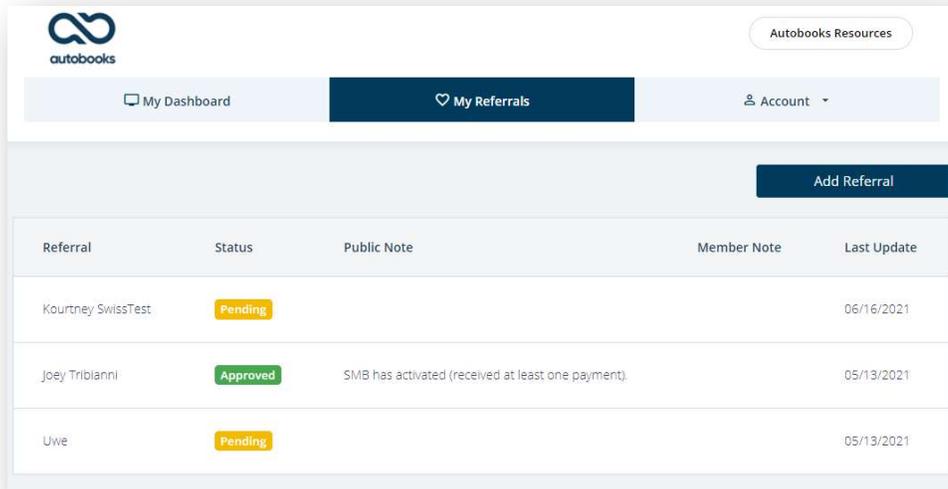
A screenshot of a web form titled "Add referral details". The form contains several input fields: "Customer First and Last Name", "Customer email address", "Customer phone number", "Business Name" (with a sub-label "Business name ..."), and "Remarks" (with a sub-label "Any information that will help the Autobooks Specialist assist the customer"). At the bottom of the form is a dark blue "Submit" button.

Once your referral has been submitted, you'll be able to track progress in the My Referral tab at the top of the screen.



Tracking Your Referral Progress

You can track the progress of your referrals whenever you log back in to the Autobooks Referral Program. Just click on My Referrals, and you'll see a list of all submitted referrals.



Referral	Status	Public Note	Member Note	Last Update
Kourtney SwissTest	Pending			06/16/2021
Joey Tribianni	Approved	SMB has activated (received at least one payment).		05/13/2021
Uwe	Pending			05/13/2021

Let's break down the referral information in the dashboard (you will also receive email notifications when a referral status changes):

- 1) **Referral** – this is the name of your customer (not the name of their business).
- 2) **Status** – we use several statuses to track the referral activity:
 - a. **Pending (no note):** your referral has been received, and we haven't made a call to the customer yet.
 - b. **Pending (with a note of "We have called the customer"):** your referral has been called by an Autobooks Specialist. Our team will attempt to contact your customer up to three times, so take note of the Last Update date!
 - c. **Qualified:** the customer has enrolled in Autobooks.
 - d. **Approved:** the customer has received at least one payment from their customer using Autobooks technology.
 - e. **Denied (no enrollment has occurred yet):** the Autobooks Specialist has not been able to establish contact with the customer over the last 30 days OR the customer declined to enroll.
 - f. **Denied (after enrollment has occurred):** the customer was not approved for payment enablement through Autobooks.
- 3) **Public Note:** this will contain any specific notes that the referral status triggers.
- 4) **Last Update:** this is the latest activity date for the referral.