



Merchant Onboarding

April 2021

From Enrollment to Invoicing in Minutes


We've made it easy for any small businesses to enroll in Autobooks and send an invoice in a matter of minutes. In the following pages, we will take you through a typical merchant onboarding experience — from enrolling into Autobooks for the first time to sending their first invoice.

Send a professional invoice right to your customer's inbox

Create and send a great-looking invoice in minutes. Delight your customers with easy online payment options. You'll be able to see who paid their invoice, and who is past due.

☐ I accept the [terms and conditions](#)


Create and send your first invoice

 Invoice

\$566.00
Balance due

Due

11/4/2020
Due date

 Pay online

Green Belle Lawn Care
817-555-1234
stephanie@greenbelle.com

Invoice 12345
Account 67890

| Customer | Created date | Due date |
|---------------|--------------|------------|
| Carol Sanders | 10/02/2020 | 10/03/2020 |


| Product/Service | QTY | Unit Price | Amount |
|----------------------------------|-----|------------|---------|
| Standard Lawn Trim | 1 | \$55.00 | \$55.00 |
| Description | | | |
| Basic cut on front and back lawn | | | |

Total: \$55.00

Message

Some patches in the back yard may need fertilizer soon, something to consider!

Thank you!



Invoicing Landing Page

After clicking Send Invoices from the left navigation pane for the first time, the user is presented with this initial welcome screen. They must accept the terms and conditions before continuing.

Sign up for Autobooks



Please confirm the Primary Business Owner information below.

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

| | |
|--------------------------|------------------------|
| First Name * | Last Name * |
| Stephanie | Green |
| Email * | Phone * |
| stephanie@greenbelle.com | 555-567-5678 |
| Date of Birth * | Title * |
| 01/02/1993 | CEO |
| SSN * | ? Edit |
| XXX-XX-6789 | |

What is the Primary Owner's home address?

Home address should not be a P.O. Box.

| |
|------------------------|
| Home Address 1 * |
| 7970 UNIVERSITY AVE NE |
| Home Address 2 |
| |

Primary Information

After the user provides all of the relevant information in the Sign up screen, and clicks Next, a call is made to the core banking system. This personal information is supplemented with information collected from the core or Digital Banking system.

Business information



Please provide the additional information below.

| | |
|--------------------------|-----------------------|
| Company Formation Year * | Business Structure * |
| 2013 | Sole Proprietorship ▼ |

Which industry does your business serve?

| |
|----------------------------------|
| Industry * |
| Administrative and Support and ▼ |
| Industry Code * |
| Landscaping Services ▼ |

What is the largest single payment you expect to receive?

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

| |
|--------------------------|
| Largest Single Payment * |
| \$400.00 |

What is the average payment amount you expect to receive?

| |
|-----------|
| Average * |
| \$80.00 |

Business Information

Additional business information is collected in the second step. Some of it may be pre-populated with information received from the core or digital banking system. This information is then passed on to our merchant providers (in a series of APIs) for compliance and underwriting reasons (i.e., to ensure that the business in question is indeed legitimate, and that it does not pose any security threats, as deemed by OFAC). In some rare cases, Autobooks may involve the FI for additional guidance.

Note: Many businesses are approved within several minutes, and can immediately begin invoicing/accepting payments; most businesses can expect to be approved within thirty minutes. In almost all cases, businesses will be approved that same day.

Business information



Please provide the additional information below.

| | |
|--------------------------|----------------------|
| Company Formation Year * | Business Structure * |
| 2013 | LLC |

Are there any additional owners

We need to know about owners that have 25% or more ownership.

- ☒ No, there are no other owners of 25% or more ownership
- ☐ Yes, there are other owners of 25% or more ownership

Which industry does your business serve?

| |
|--------------------------------|
| Industry * |
| Administrative and Support and |

| |
|----------------------|
| Industry Code * |
| Landscaping Services |

What is the largest single payment you expect to receive?

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

Business Information - LLC


This screen is identical to the last; however, notice that here the user has selected LLC as the Business Structure. If this is the case, the user must provide additional information regarding ownership.

Congrats! Your account is now live 🎉

Now, let's set up your first invoice so you can get paid directly into your business checking account.



















First, you'll add your customer's info and a description of the product or service you're billing for.

Then, you'll have a chance to review your invoice before you hit send.




Invoice

Green Belle Lawn Care

817-655-1234
kay@greenbellevm.com

| | | |
|--|--|--|
|   |   |   |
|   |   |   |
|   | | |
| | |  |
| | |  |
|   | | |

Thank you!
 5484 Garfield Rd
 Suite 23
 Saginaw, MI 48603-9610

[Add my first customer](#)

Congrats Message

If the user is approved, they will be presented with this congratulatory screen. To begin a guided tour of the invoicing process, they can click Add my first customer at bottom.

Step 1/3: Add your customer's info

Tell Autobooks who you want to send this invoice to

Will you send this invoice to a company (i.e. Jan's Dry Cleaning Service) or an individual (i.e. Jan Smith)?

☐ Company☒ Individual

Morgan *

Childs *

M.childs@aol.com

Invoice due date *
04/04/2021

We'll send your invoice to your customer's email so they can pay you any time day or night via credit card or bank account info.

Create an Invoice Step 1: Customer Info

In this first step of the guided tour, the user is prompted to provide some basic payee information. After clicking the Add billable items button, the user is taken to step 2.

Step 2/3: Add the products or services you're billing for

Now, tell us what you're invoicing for

Landscaping Basic Maintenance

Quantity
1Price per unit
\$350.00Subtotal
\$350.00

We mowed, trimmed the hedges, and did all of the edging.

[+ Add another](#)

Total cost: \$350.00

Create an Invoice Step 2: Add Product

In this second step of the guided tour, the user is prompted to provide some additional information regarding the specific items billed. After clicking the Save and review invoice button, the user is taken to the final step.



Dashboard



Invoices



Payment Form



Pay Bills



Accounting



Reports



Settings



Need Help?



Logout

Step 3/3: Review and send your invoice

Please review your invoice. If you need to make any changes, return to the previous steps


\$12.00

Balance due

Due

08/14/2019

Due date



Pay online

Green Bell Lawn Care
817-555-1234
stephanie@greenbelle.com

Invoice 913536
Account 17414

Total: \$350.00

Thank you!

Create an Invoice Step 3: Review and Send

In this final step of the guided tour, the user is presented with the populated invoice, for review. If it is accurate, the user can send out their first invoice by clicking the button in the top right corner.

- Dashboard
- Invoicing
- Payment Form
- Pay Bills
- Accounting
- Reports
- Settings
- Need Help?
- Log Out

Invoices Estimates Customers Payments Products/Services Invoice Settings

+ New invoice

Search criteria ▾

| Name | Status | Invoice # | Due date | Total amount | Balance due |
|---------------|-----------|-----------|-------------|--------------|-------------|
| 1099-MEI | Past due | 13567 | 8/30/2018 | \$150.00 | \$65.00 |
| ABC Co | Past due | 12678634 | 6/28/2018 ↻ | \$150.00 | \$65.00 |
| Comcast Cable | Cancelled | 27931 | 3/30/2018 | \$150.00 | \$65.00 |
| COMCAST | Paid | 1212 | 4/30/2018 | \$150.00 | \$65.00 |
| AAA Vendor | Paid | 323552 | 4/28/2018 | \$150.00 | \$65.00 |
| Apple Inc. | Active | 235235 | 4/20/2018 ↻ | \$150.00 | \$65.00 |
| 1099-MEI | Active | 235352 | 4/19/2019 ↻ | \$150.00 | \$65.00 |
| ABC Co | Paid | 546545 | 4/4/2018 | \$150.00 | \$65.00 |

Invoices

This is the standard Invoicing screen, and shows the various options for managing invoices, creating estimates, managing customers, and so on. A new invoice can be created from this screen by clicking the New invoice button at the top.