



# Autobooks Plugin Testing:

**Four easy steps to enable and  
test the Banno Plugins from  
Autobooks**

---

August 2021



# Four Steps to Success

Thank you for your interest in the Banno Plugins from Autobooks. If you have any questions along the way, please email our team at [bannoplugins@autobooks.co](mailto:bannoplugins@autobooks.co).

To help your financial institution prepare for this upcoming update, we've put together this short guide. In the following pages, you will find an itemized checklist with all the step-by-step information you need to know for a seamless launch. In addition, you will find an overview of upcoming educational sessions and relevant resources.

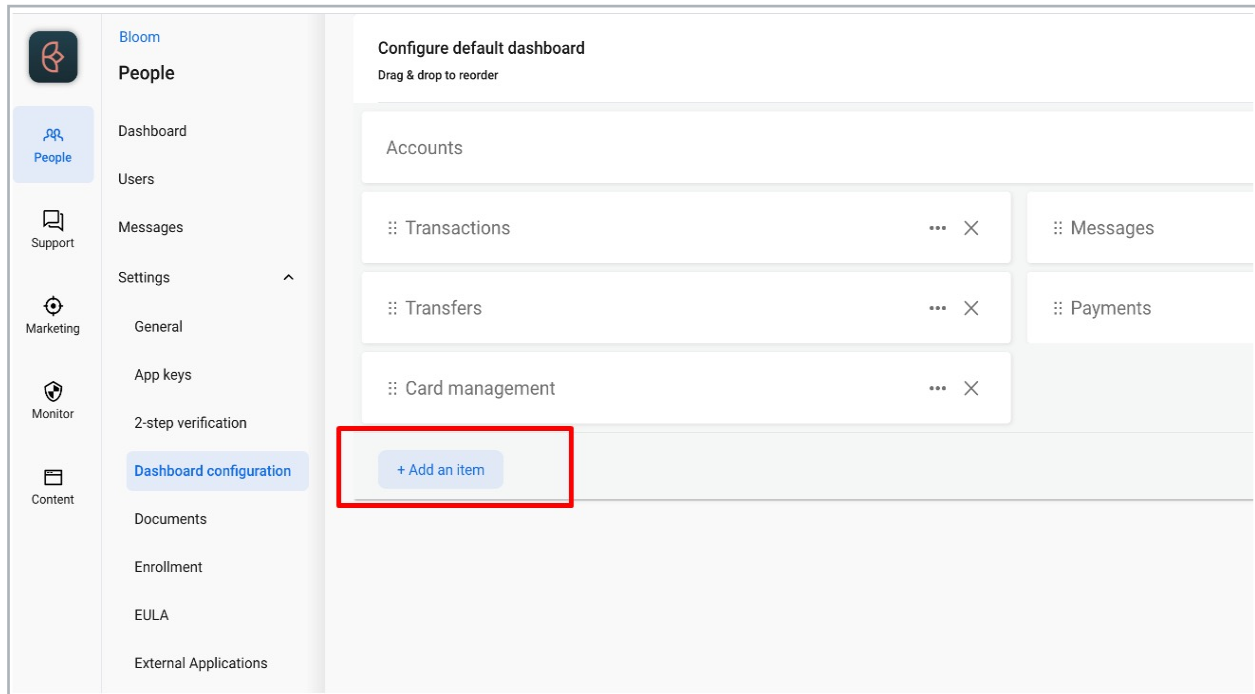
## Plugin testing can be completed in four easy steps:

To get started, Banno and Autobooks have automated the implementation of the new Plugins for your financial institution. Below are the best practices to ensure a successful launch:

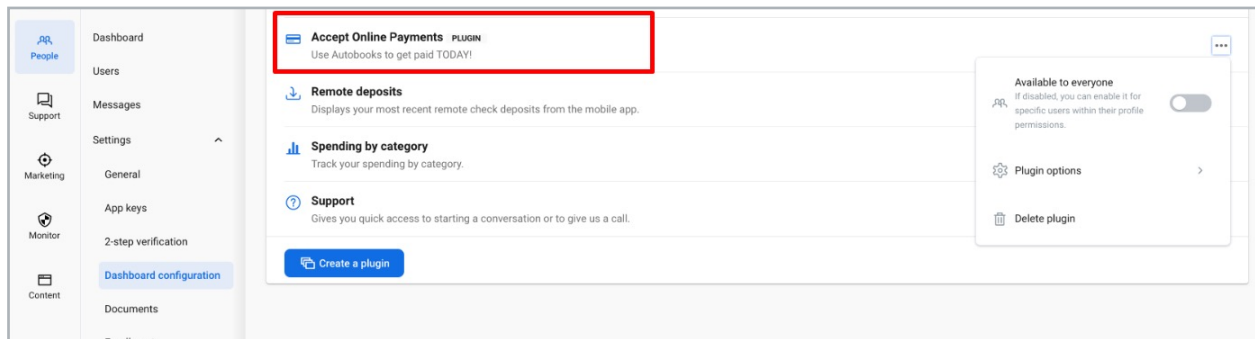
1. Add the Autobooks plugin to the default dashboard
2. Enable the plugin for a test user account
3. Initiate enrollment via the Send an Invoice or Accept Payment dashboard card in Banno Online or Banno Mobile
4. Enroll your test user in Autobooks (for more information, refer to our [enrollment process for small business guide](#)).

## Step 1 – Add the Autobooks plugin to the default dashboard:

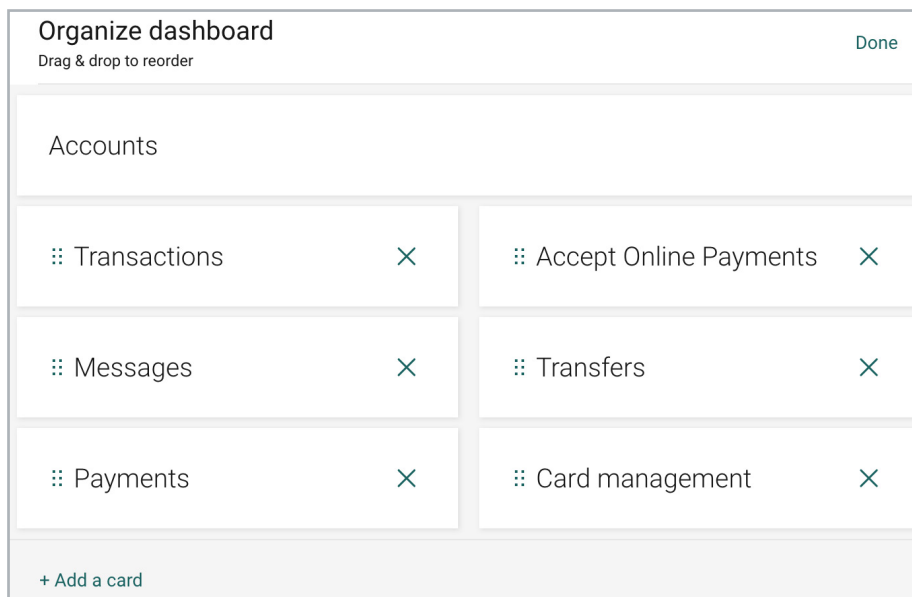
1. In Banno People, navigate to **Settings > Dashboard configuration**
2. Click the '**Add an Item**' button



3. Select (click on) the **'Accept Online Payments plugin'**



4. You will be returned to the **'Default Dashboard'** page, and the **'Accept Online Payments'** dashboard card will have been added to the list

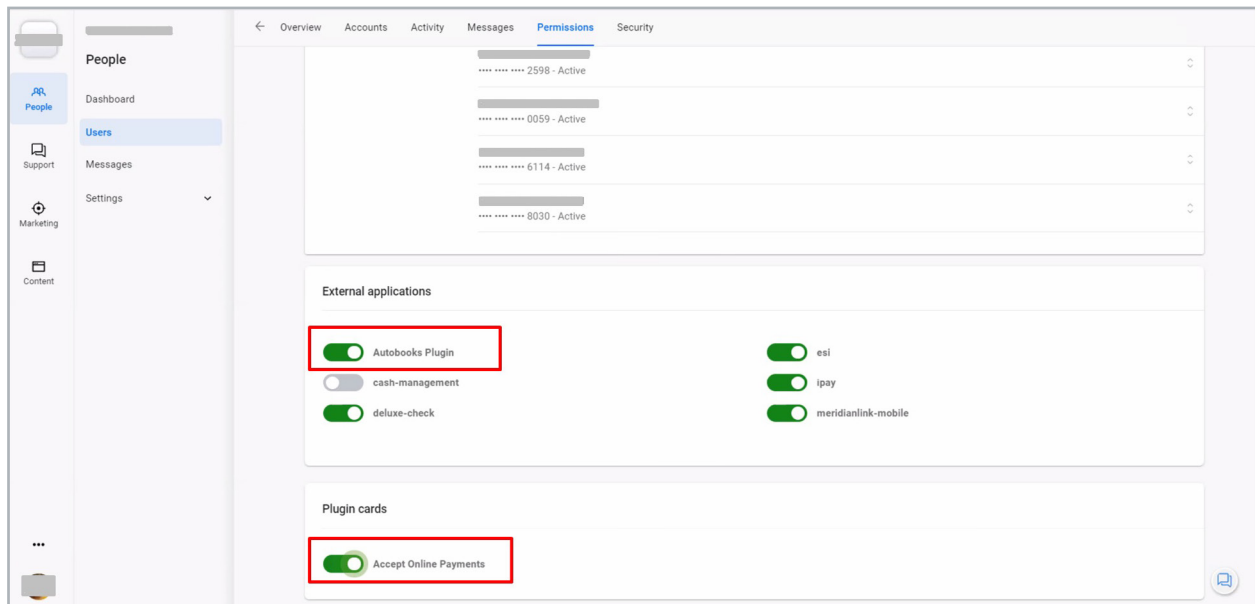


5. Choose the desired location for the **'Accept Online Payments'** dashboard card. We suggest that you prominently feature this card in the upper left or right-hand corner for discoverability.

6. Click **'Save'** in the upper right to complete this step

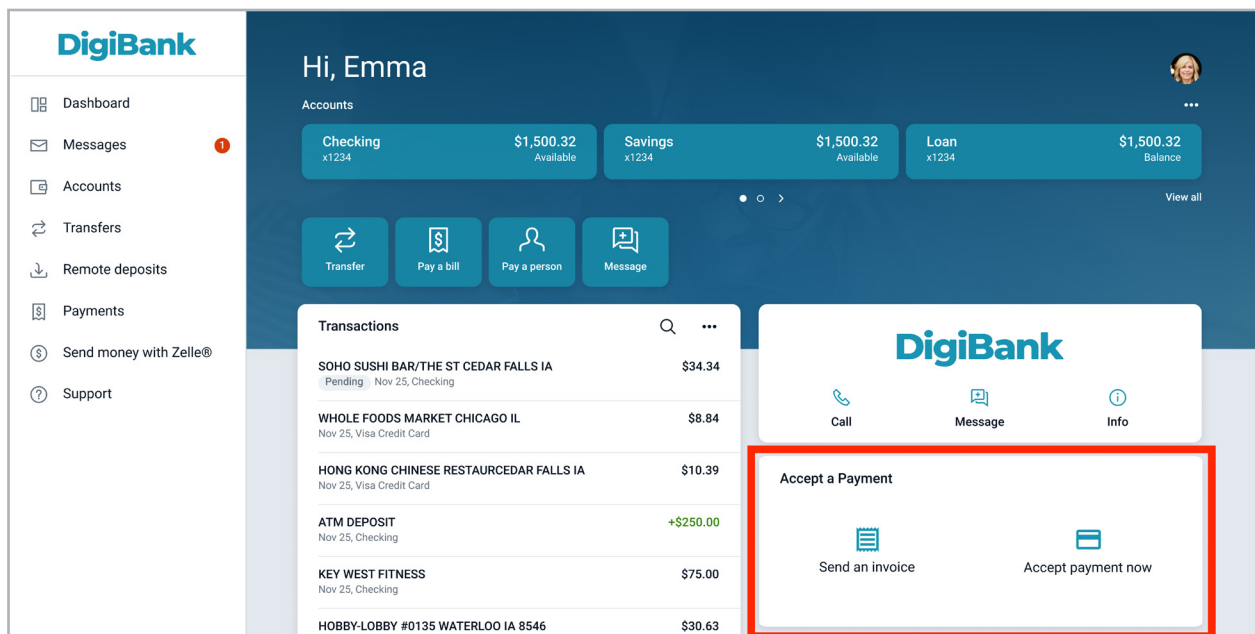
## Step 2 – Enable the plugin for a test user account:

1. Choose the Banno user account you will use for plugin testing
2. In Banno People, navigate to **Users > Find User > Permissions > External Applications**
3. Under ‘**External applications,**’ enable **Autobooks Plugin**
4. Under ‘**Plugin cards,**’ enable **Accept Online Payments**



### Step 3 – Initiate the Send an Invoice or Accept Payment dashboard card via Banno Online or Banno Mobile

1. Log into Banno Online or Banno Mobile
2. Select either Plugin to begin enrollment



3. Confirm selection of the **Send an Invoice** Plugin should take you to the Invoice landing page (see next page for reference)
4. Confirm the selection of the **Accept Payment Now** Plugin takes you to the Accept Payment landing page (see next page for reference)

## Invoice Landing Page:

### 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!

DigiBank

## Accept Payment Now Landing Page:

### Start accepting credit cards in minutes with Payment Form

Your Payment Form is among the fastest, easiest, and most cost-effective ways to accept credit card payments online, directly into your {FI Name} Account.

**Never** worry about writing down (or losing) a customer's credit card information. Get your money in 2 days or less and pay **no monthly fees**.

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

Turn on my Payment Form now

Make a payment to Green Belle Lawn Care

989-274-0407  
Jen@greenbelle.com

VISA

1123

Jane Doe

Mar 2021

Send payment



## Step 4 – Enroll your test user to accept payments

1. Complete and submit the enrollment form data

### Business information

● ● ●

Please provide the additional information below.

Company Formation Year \*  
2013

Business Structure \*  
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

What is your estimated annual revenue?

Average \*

2. If you use actual/live data from a personal or business account, the test account will be verified by the Autobooks merchant enrollment APIs or merchant enrollment team
3. Once verified and approved, you can then accept a live payment to fully complete testing (see next page for reference)

## Enrollment Confirmation:

