

Coming Soon!

# Free Integrated Invoicing & Payment Acceptance Plugins

for Banno Online and Banno Mobile

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# Agenda

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- About Autobooks
- Small business market
- Free Plugins vs Standard Autobooks
- Intro to the launch process
- FAQs
- Open Q&A

# Visit our Project Resource Center

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- Register for upcoming webinars
- Product videos
- Project overview
- Launch planning
- FAQ document
- Product tour and descriptions
- Enrollment process for SMBs
- Go-to-market support

[learn.autobooks.co/banno-plugin-introduction](https://learn.autobooks.co/banno-plugin-introduction)

# Please select your preference on the Get Started page on our Resource Center

## Banno Plugins - Free Upgrade

- ✓ Invoicing Dashboard Plugin
- ✓ Accept a Payment Dashboard Plugin
- ✓ Autobooks Product Tour
- ✓ In app upgrade option for accounting and reporting
- ✓ Group training and testing events
- ✓ Self-service GTM tools
- ✓ No Contracting Required

Launching for all Banno Clients **August 16<sup>th</sup>**

## Standard Autobooks - Monthly Fee

- ✓ Complete Autobooks product suite in primary menu
- ✓ Invoicing & Accept Payment Plugins included
- ✓ Dedicated installation team and support
- ✓ Assigned account manager
- ✓ Autobooks powered marketing services
- ✓ Access to incentive and bonus programs
- ✓ Requires a contract

Available for all Banno Clients **NOW**

Interested in taking advantage of the Free Plugins



Get Started - Free Plugins

Interested in learning more about the Standard Autobooks solution



Get Started - Standard

## Still have questions or undecided on what option is right for you?

Click the link below to request additional information

Have more questions or want to opt-out



[Undecided - Request Info](#)

# Standard Autobooks Solution

Live with over 40 JHA FIs today

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## **Product Features:**

- Digital invoicing
- Online payment acceptance
- Cash flow management
- Automated accounting
- Financial reporting

## **Services Provided:**

- Dedicated account management
- Autobooks powered GTM services - proven to drive increased deposits and revenue

**Directly integrated** within the menu navigation of Banno Online and Banno Mobile

# **Small Business Market**

# Small Businesses Have Lots of Options...

We help you stay ahead of the competition

Jun 1, 2021, 08:00am EDT | 3,048 views

## In The War Between Square, PayPal And Shopify, Banks Are Collateral Damage



**Ron Shevlin** Senior Contributor

Fintech

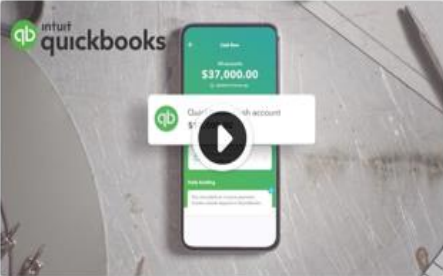
*Observations from the Fintech Snark Tank*

Follow

## Managing cash flow made easy

The Cash Flow center gives you one place to plan, save, and get paid. Forecast finances, sync all your accounts, and even open a checking account built right in QuickBooks.

Get started

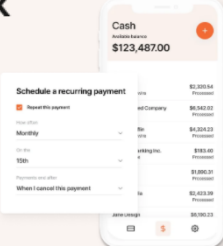


## Replace your business bank account



Brex Cash is a bank account alternative that companies of any size can use to deposit cash, send payments, and track spend. With the Brex Card, it's your new financial OS.

Get started



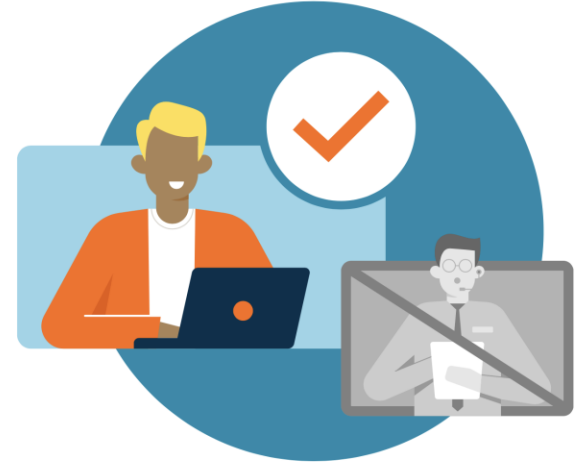
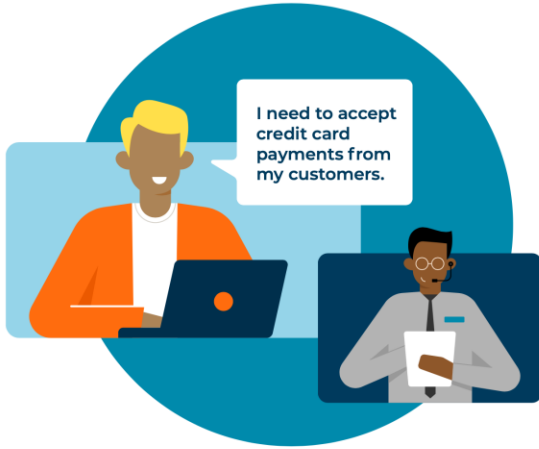
## Banking doesn't need to be a dirty word.



Wave Money does what your business bank account can't: manage your bookkeeping for you.

Reserve my spot





When small businesses use **BigTech** providers to accept payments, it leads to **decreases in:**

**Deposits**  
**Non-interest fee income**  
**Lending opportunities**



 **Banno Digital Toolkit**

# Banno. Now open.

Banno is opening up our technology to allow you to innovate faster and deliver top-notch experiences that can compete with the MegaBanks and BigTechs.

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[Explore Developer Docs](#)



# Invoicing & Payment Acceptance Plugins

Free to install for all Banno Digital Banking clients

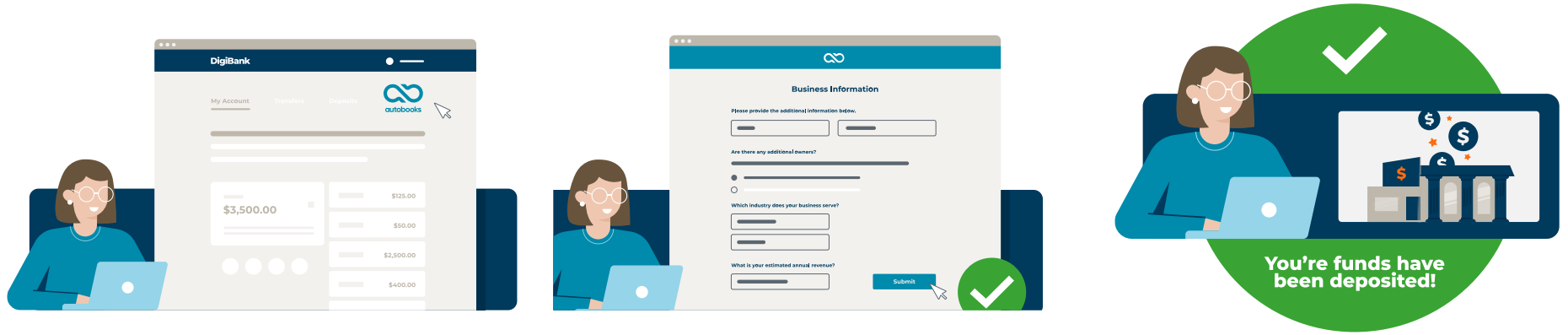
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## Free Plugins Includes:

- Digital invoicing dashboard card
- Online payment acceptance dashboard card
- Automated enablement for all Banno FIs – Beginning August 16th
- Training and testing events prior to go live
- Self—service GTM tools (digital ads, emails, landing pages, and more)

## Stay ahead of the competition

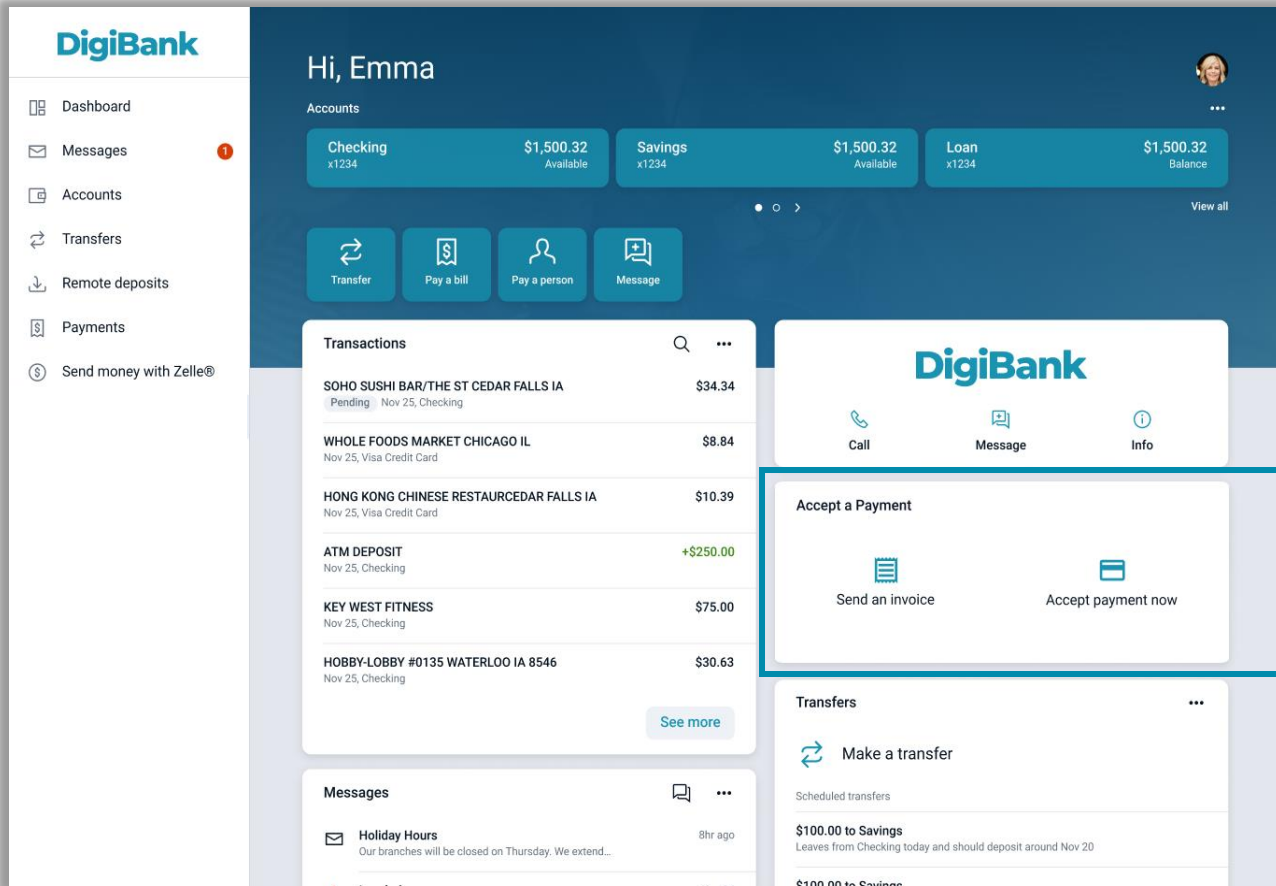
Enable businesses and non-profits to accept card and ACH payments online and in app - directly from Banno Online and Banno Mobile.



When small businesses uses the **Banno Plugins** to accept payments, it leads to **increases in:**

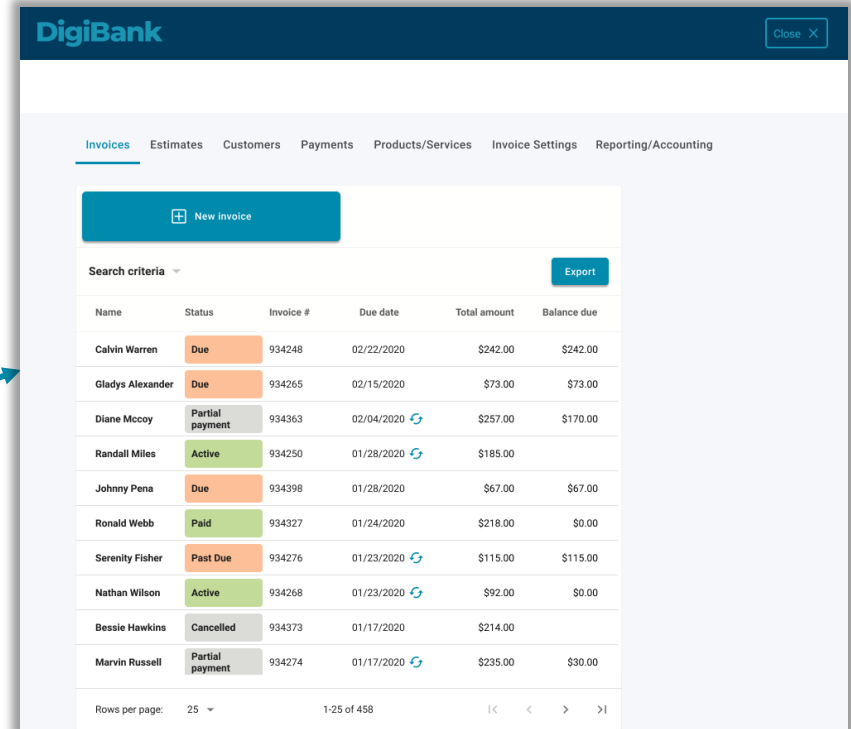
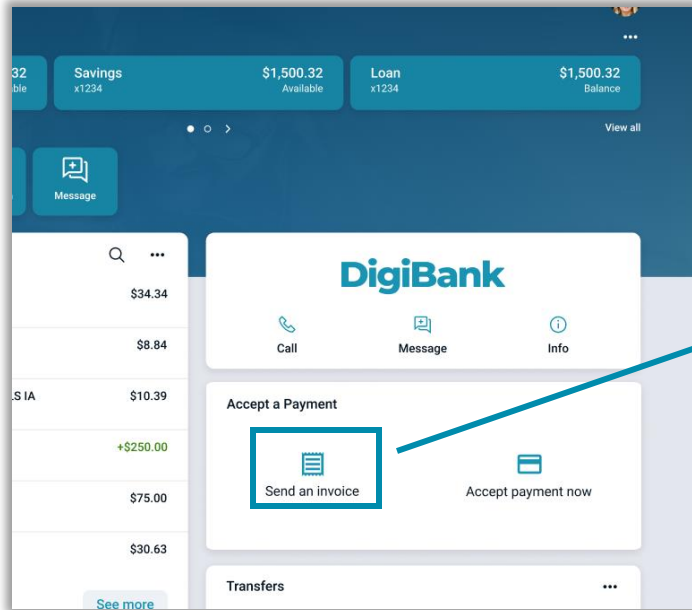
**Deposits**  
**Non-interest fee income**  
**Lending opportunities**

# Free Banno Plugin Overview



# Stand alone Invoicing module

End users enroll in app to send digital invoices that can then be paid online.



+ New invoice

Search criteria ▾

Export

Name	Status	Invoice #	Due date	Total amount	Balance due
Calvin Warren	Due	934248	02/22/2020	\$242.00	\$242.00
Gladys Alexander	Due	934265	02/15/2020	\$73.00	\$73.00
Diane Mccoy	Partial payment	934363	02/04/2020 ↻	\$257.00	\$170.00
Randall Miles	Active	934250	01/28/2020 ↻	\$185.00	
Johnny Pena	Due	934398	01/28/2020	\$67.00	\$67.00
Ronald Webb	Paid	934327	01/24/2020	\$218.00	\$0.00
Serenity Fisher	Past Due	934276	01/23/2020 ↻	\$115.00	\$115.00
Nathan Wilson	Active	934268	01/23/2020 ↻	\$92.00	\$0.00
Bessie Hawkins	Cancelled	934373	01/17/2020	\$214.00	
Marvin Russell	Partial payment	934274	01/17/2020 ↻	\$235.00	\$30.00

Rows per page: 25 ▾

1-25 of 458

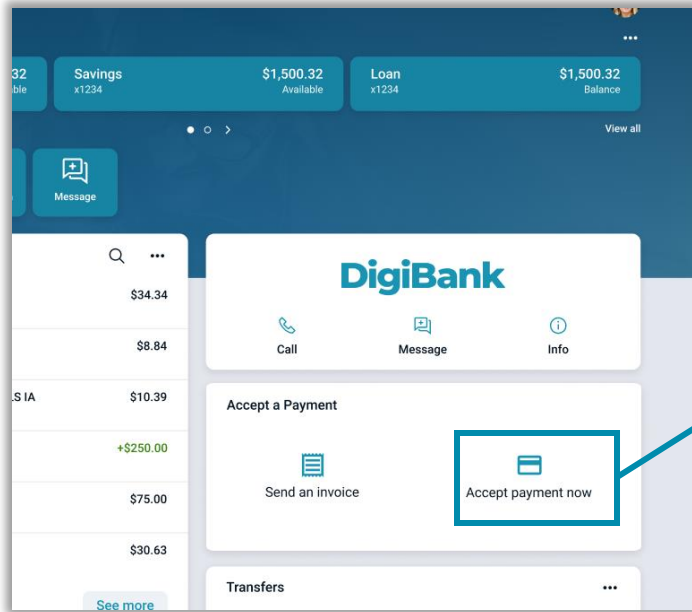
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## All features needed for invoicing are available within the module:

- Manage invoices
- Manage estimates
- Add and manage customers
- Track and manage payments
- Add and manage products
- Manage invoice settings

# Stand alone Payment Form module

End users enroll online to accept payments directly in the app or to share a secure Payment Form link.



A screenshot of the 'Accept Payments' form in the DigiBank app. The form is titled 'Accept Payments' and includes the following sections:

- Payment amount:** A text input field labeled 'Payment amount \*'.
- Payment schedule:** A dropdown menu currently set to 'One-time payment', with a link 'What's this?'.
- Payment method:** Two options: 'Credit/Debit' (selected) and 'Bank account'.
- Card details:** Text input fields for 'Name on card \*', 'Card number \*', 'Exp. month \*', 'Exp. year \*', 'CCV \*', and 'Zip code \*'.
- Security:** A checkbox labeled 'I accept the terms and conditions.'
- Submit:** A green button labeled 'Submit payment'.



## ☰ Accept a payment

Enter your customer's payment information and accept credit card and ACH payments.

Accept a payment

## 🔗 Share your Payment Form link

Copy your unique Payment Form link and send it to customers to allow them to pay online:

<https://autobooks.co/pay/green-belle-lawn-care>

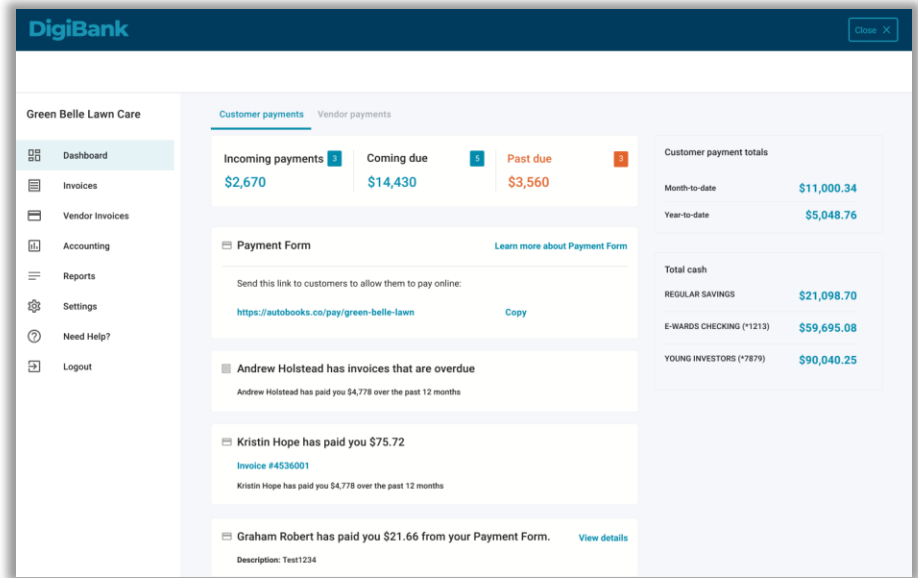
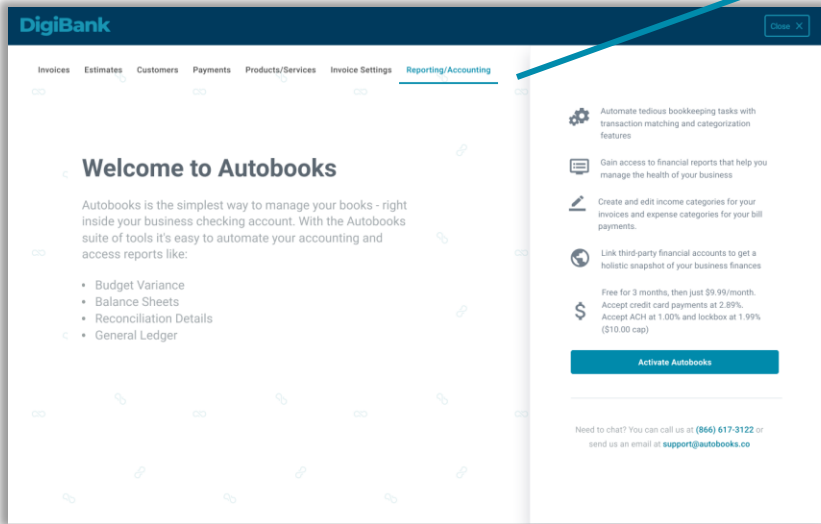
Copy link

## All features needed for the payment form are available within the module:

- Accept payment directly inside digital banking
- Share payment form links
- Track and manage payments
- Manage payment form settings

# In module upgrade for Accounting & Reporting for the end user

End user option to upgrade the Invoicing or Accept a Payment Plugin to include **Accounting and Reporting** for \$10 per month



\*Does not include bill pay or payroll. Those features are only available through Standard Autobooks

# **SMBs Enrollment Process and Processing Rates**

**Enrollment is online and only takes minutes.**

**Autobooks handles all of the compliance and underwriting.**

**Streamline customer enrollment.**

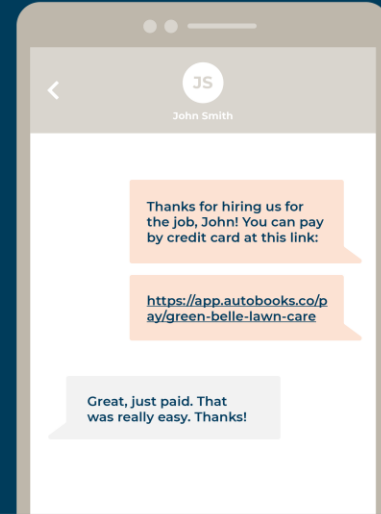
A screenshot of a web browser window showing a form titled "Business Information". The browser's address bar is orange with a logo on the left and a "Logout" link on the right. The form content includes:

- A heading "Business Information" followed by the instruction "Please provide the additional information below."
- Two empty text input fields.
- A question "Are there any additional owners?" with a radio button selected and a text input field below it.
- A question "Which industry does your business serve?" with two empty text input fields.
- A question "What is your estimated annual revenue?" with one empty text input field.
- A dark grey "Submit" button with a mouse cursor hovering over it.

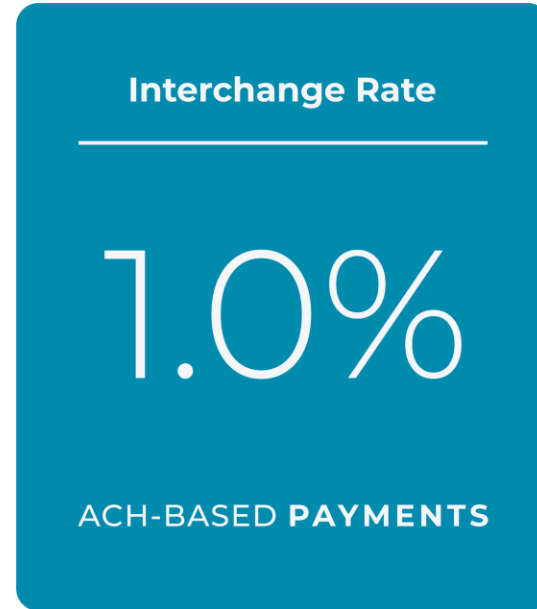
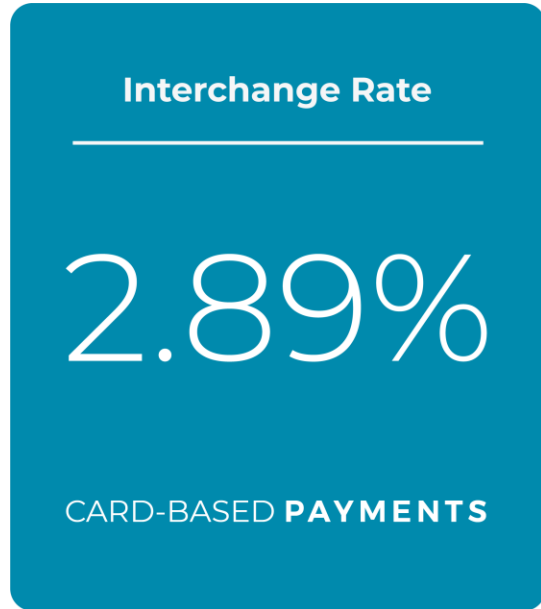


When a small business gets paid through Autobooks, the financial institution participates in the interchange revenue.

Increasing non-interest fee income.



## Transaction processing rates



The FI receives revenue share from each payment processed through the Plugins

## FI revenue share

Net transaction rev share

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15%

Across all payment types

Monthly fee rev share

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\$2.49

Per active user/month

Earn non-interest fee income from every active end user. Those that are actively getting paid + those that upgrade to access Accounting & Reporting

All payments received  
are deposited directly  
into their existing  
checking account.

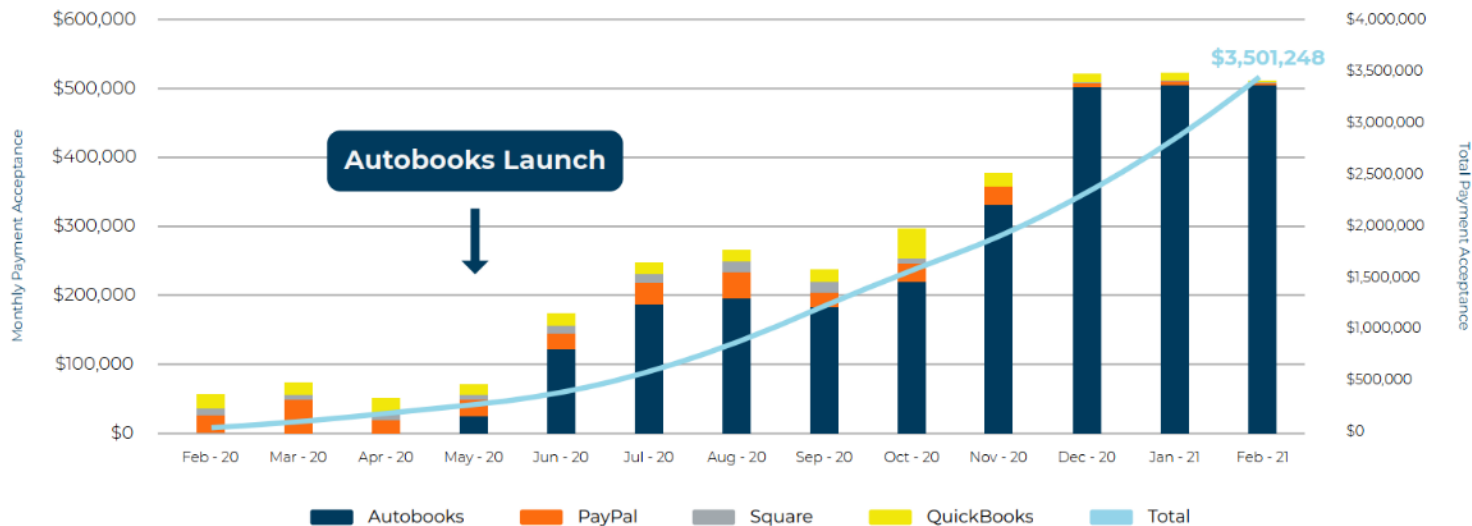
Growing deposits.





# Autobooks out-competes non-bank providers

Non-bank provider usage declined **-77%** within 9 months of launch  
Autobooks usage grew **+347%** during that same time



\*Bank achieved 3% adoption (308 SMB enrollments) in first ~9 months.

\*Cohort (above) represents ~10% of enrolled SMBs (31) that utilized Non-Bank Providers + Autobooks for 12 consecutive months upon deployment.

# **Free Banno Plugin vs Standard Autobooks**

# Banno Plugins vs Standard Autobooks

## Free Plugin Upgrade

\$0/month

- ✓ **Plugins only**
- ✓ Group training and testing events
- ✓ Banno Marketing ad inventory
- ✓ Self-service GTM tools
- ✓ Requires no contracting

Plugin available to all users - **Aug 16th**

## Standard

Monthly fee

- ✓ **Plugins + Dedicated menu navigation**
- ✓ Dedicated install & acct mgt teams
- ✓ Autobooks powered marketing services
- ✓ Front-Line incentive & bonus program
- ✓ Requires a contract

Standard available to all users - **Now**

# Project Resources - Introduction

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## Introduction

- Project overview
- Launch planning
- FAQs
- Support and training
- SMB enrollment process
- Go-to-market support

[Learn.autobooks.co/banno-plugin-introduction](https://learn.autobooks.co/banno-plugin-introduction)

# Project Resources – Solution Overview

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## **Solution overview**

- Comparing Free Plugins vs Standard Autobooks
- SMB marketing video
- Product overview
- SMB pricing details

[Learn.autobooks.co/banno-plugin-page-solutions-overview](https://learn.autobooks.co/banno-plugin-page-solutions-overview)

# Project Resources – Get Started

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## Get started

- Comparing Free Plugins vs Standard Autobooks
- Select Free Plugin upgrade
- Select Standard Autobooks
- Undecided, request more information

[Learn.autobooks.co/banno-plugin-page-get-started](https://learn.autobooks.co/banno-plugin-page-get-started)