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Enrollment Process for Small Business

From Enrollment to Invoicing in Minutes

We've made it easy for customers who own small businesses to enroll in Autobooks and get paid — either by invoice or by payment form — in a matter of minutes. In the following pages, we will take you through the steps involved in the merchant onboarding process: from the initial information requirements that a small business must provide, to the various behind-the-scenes steps that must happen in order for the new applicant to be approved.
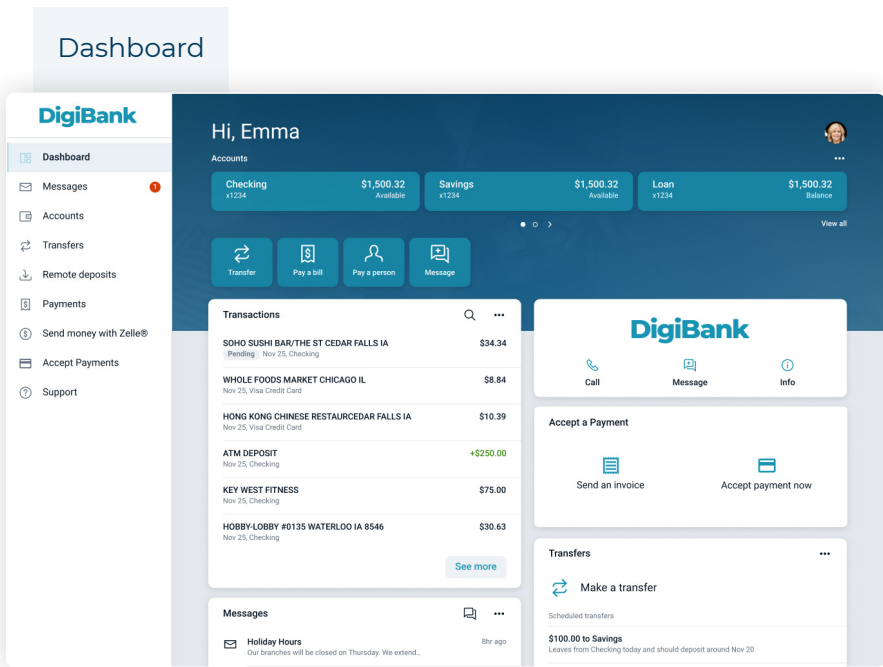
Your customers who own small businesses will be able to access the new invoicing and payment acceptance plugins directly from the Banno Online and Banno Mobile dashboards.

Invoicing Plugin
Give your SMB clients the ability to easily send professional invoices

Accept a Payment Plugin
Offer SMBs and nonprofits a way to accept online or in-app payments

Once enrolled, customers can start accepting card and ACH payments in-app or online. Each time they get paid through Autobooks, they pay an interchange fee. Autobooks will revenue share that with your financial institution. Customers may also choose to upgrade their Plugins to include accounting and reporting functionality — powered by Autobooks.

A note regarding the enrollment process: The following pages describe the enrollment process in detail after a user has clicked Send an invoice from the Banno dashboards for the first time. If a user instead clicks the Accept a payment feature, they will still be prompted to provide the same business information; however, the screens may vary somewhat from the invoicing screens documented here.

Invoicing Landing Page
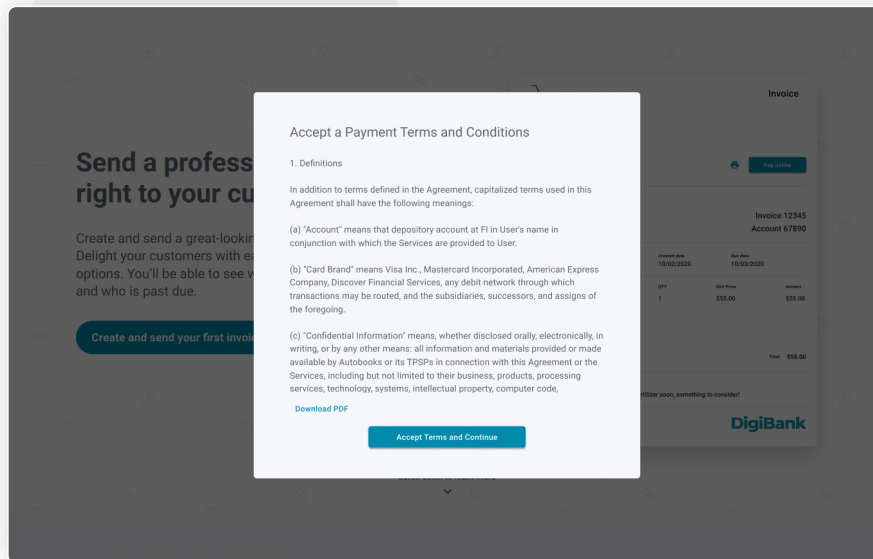
After clicking Send Invoices from the Banno Online or Banno Mobile dashboard the first time, the user is presented with this initial welcome screen. They must accept the terms and conditions before continuing into the enrollment process.

Important: Some institutions may require less information from an applicant, based on their supporting technology. As such, some applicants will not see all of the questions or steps documented here. Nevertheless, for the sake of thoroughness, we will document all of the enrollment steps in the following pages.

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Provide Primary Information

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 *
Valerie

Last Name *
Miller

Email *
v.miller@gmail.com

Phone *
248-224-6211

Date of Birth *
01/02/1993

Title *
CEO

SSN *
XXX-XX-6789   ⓘ   Edit

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

City *
Fridley

State *
MN

Zip Code *
55432-0000

Please confirm the business information below.

Business Name *
VAL'S SNOW REMOVAL LLC

DBA *
Val's Snow Removal   ⓘ

☐ I do not have a DBA

EIN / TIN
                 ⓘ   Edit

☑ My EIN is the same as my SSN

Please use the business address registered with the IRS.

Business Address 1 *
7970 UNIVERSITY AVE NE

Business Address 2

City *
Fridley

State *
MN

Zip Code *
55432-0000

Back   Next

A call is made to the core or digital banking system prior to this initial step. The user is then prompted to provide personal information not found by the core/digital banking system.

Provide Business Information

Business Information

Please provide the additional information below.

First Name *
2013

Business Structure *
Sole Proprietorship

Which industry does your business serve?

Industry *
Administrative and Support and

Industry Code *
Landscaping Services

Which industry does your business serve?

Industry *
Administrative and Support and

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 *
$50,000.00

Back   Submit

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 financial institution for additional guidance.

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Provide Business Information for LLC

Business information

Please provide the additional information below.

Company Formation Year *
2013

Business Structure *
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.

Largest Single Payment *
$400.00

What is the average payment amount you expect to receive?

Average *
$80.00

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 Message

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
989 274 0467
test@autobooks.co

Thank you!
5464 Garfield Rd
Suite 22
Saginaw, MI 48603-9618

Add my first customer

The user is presented with a congratulatory screen after their account is created. To continue with a guided tour of the invoicing process, they can click Add my first customer at the bottom.

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The final phase of enrollment is a guided tour of the invoicing or payment form experience.

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.

### 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.

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Create an Invoice Step 3: Review and Send
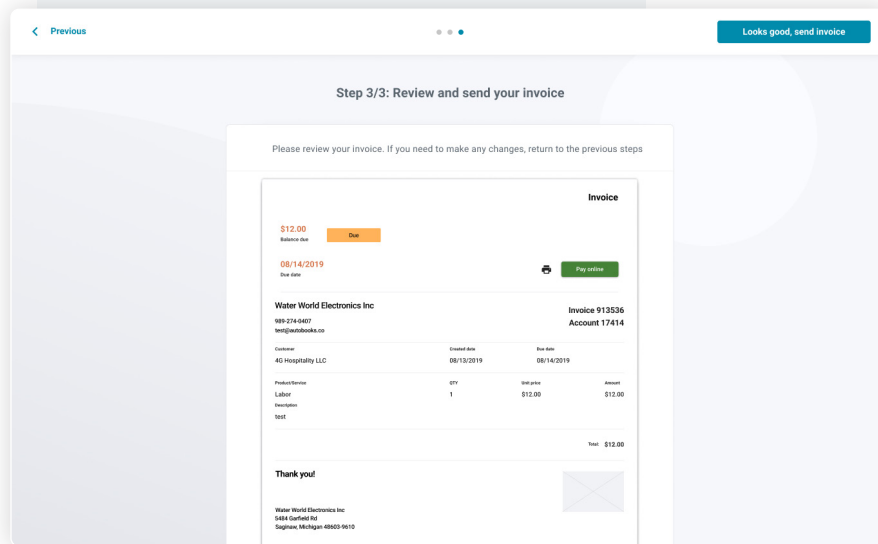
In this final step of the guided tour, the user is presented with the populated invoice, for review. If it is accurate, the user can send out their first invoice by clicking the button in the top right corner.

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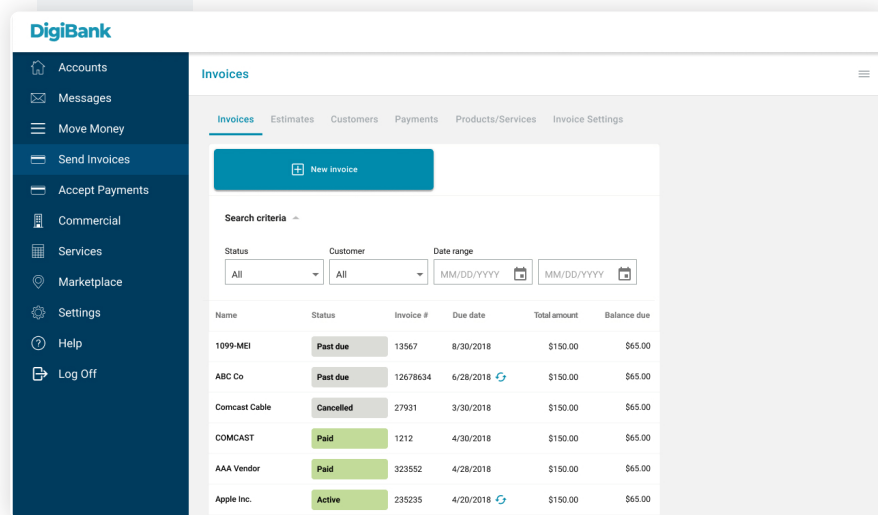
This is the standard Invoicing screen, and shows the various options for managing invoices, creating estimates, managing customers, and so on. A new invoice can be created from this screen by clicking the New invoice button at the top.

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