



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.

- Accounts
- Messages
- Move Money
- Send Invoices
- Accept Payments
- Commercial
- Services
- Marketplace
- Autobooks
- Settings
- Help
- Log Off

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

Scroll down to learn more



 Invoice

\$566.00
Balance due Due

11/4/2020  [Pay online](#)
Due date

Green Belle Lawn Care Invoice 12345
817-555-1234 Account 67890
stephanie@greenbelle.com

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**

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.

- Accounts
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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		
City *	State *	Zip Code *
Amarillo	TX	79102-0000

Please confirm the business information below.

Business Name *

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

What is your estimated annual revenue?

Average *
\$50,000.00

[Back](#)

[Submit](#)

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.

Largest Single Payment *

\$400.00

What is the average payment amount you expect to receive?

Average *

\$80.00

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.

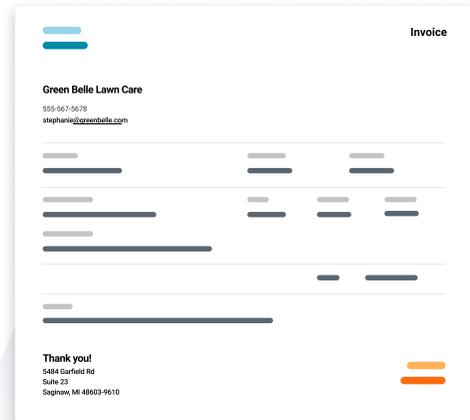
- Accounts
- Messages
- Move Money
- Send Invoices**
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- Services
- Marketplace
- Autobooks
- Settings
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Congrats! Your account is now live 🎉

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.



[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 1	Price per unit \$350.00	Subtotal \$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.

Step 3/3: Review and send your invoice

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

Invoice

\$12.00
Balance due Due

08/14/2019
Due date Print Pay online

Green Bell Lawn Care Invoice 913536
817-555-1234 Account 17414
stephanie@greenbelle.com

Customer	Created date	Due date
4G Hospitality LLC	08/13/2019	08/14/2019

Product/Service	QTY	Unit price	Amount
Basic landscaping package	1	\$350.00	\$350.00
Description We mowed, trimmed hedges, and did all of the edging.			
			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.

[+ 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
Comcast Cable	Status	13567	3/30/2018	\$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.