

## Common Customer Questions – Q2

Below are a few questions you and your team may be asked about Autobooks. As always, if you face any questions that you'd like help answering, don't hesitate to forward them over to the Autobooks support team at [Support@Autobooks.co](mailto:Support@Autobooks.co), or at 866-617-3122.

### **Q: What is Autobooks?**

**A:** Autobooks is a tool for business customers that allows you to send invoices, accept payments, and keep track of customers from *inside* online banking.

### **Q: Who is Autobooks for?**

**A:** Business customers must have a business checking account and access to business internet banking to enroll in Autobooks.

The following types of businesses are great fits for Autobooks:

- Any business that sends a bill/invoice for its product or service
- Service based businesses
- Non-profits seeking to collect donations online

### **Q: What are the benefits to using Autobooks?**

**A:** Autobooks is a complete set of financial tools inside of internet banking. Run your business from one place, without the need to pay for other software. Work smart and have more time to do what you love. With Autobooks, you can:

- Create professional invoices electronically or physically in seconds.
- Accept payment by credit card, debit card, ACH transfer, and mailed in check, all directly on the invoices you send.
- Keep track of which customer has paid, and how much.
- Generate reports like balance sheets, income statements, and customer aging reports at the click of a button.

### **Q: Can I get help getting started?**

**A:** Absolutely! The Autobooks team is here to help. You can:

- Book a free one on one session using the booking tool within the Autobooks information page  
OR
- Contact the Autobooks team at [Support@autobooks.co](mailto:Support@autobooks.co)  
Call between 9am and 6pm Eastern time at 866.617.3122

### **Q: How do I sign up to try it?**

**A:** You can enroll inside of internet banking or alternatively you can book a meeting with Autobooks on the Autobooks informational page. You can also contact the Autobooks team at [Support@autobooks.co](mailto:Support@autobooks.co).

**Q: Is Autobooks working with financial institution? Is this safe?**

**A:** Yes! Autobooks has partnered with your financial institution to bring business customers the best invoicing and accounting platform available on the market. Autobooks exceeds industry standard security to protect customer information.

**Q: Do I have to download any software to use Autobooks?**

**A:** No downloads of any kind are required. Autobooks lives completely inside of internet banking.

**Q: How is this different from QuickBooks?**

**A:** Autobooks is built directly into internet banking, so you don't need multiple logins. Additionally, Autobooks is designed with small business owners in mind, not accountants, so it's streamlined to focus on receivables, payables, and cashflow, while providing a fully functional accounting tool in the background.

**Q: I already have QuickBooks. Why should I consider switching to Autobooks?**

**A:** Autobooks is an equally powerful business accounting system that keeps everything securely in one place: inside your current online business account. Our features are the right size for small business.

**Q: Does Autobooks replace QuickBooks?**

**A:** Yes, it can. Autobooks is a simple way to keep your business accounting organized. We're built for business owners, not accountants, and we'd be more than happy to help you import your QuickBooks data so you can see the difference for yourself...and no, we do not charge extra for this service. That said, some businesses choose to add Autobooks on top of their existing systems, and simply utilize Autobooks for its invoicing and payments functionality.

**Q: I have two businesses; each have a separate bank account with my financial institution. Can I sign up both businesses with Autobooks?**

**A:** Yes! You'll need to have an online banking profile for each business (unique login credentials for each business to online banking). Log in under each profile and follow the enrollment steps within Q2.

**Q. Where can I learn more?**

**A:** You can visit the Autobooks information page for more information or to book time with an Autobooks Specialist.

Alternatively, feel free to email the Autobooks team any time at [Support@Autobooks.co](mailto:Support@Autobooks.co) or call them between 9am and 6pm Eastern time at 866.617.3122.