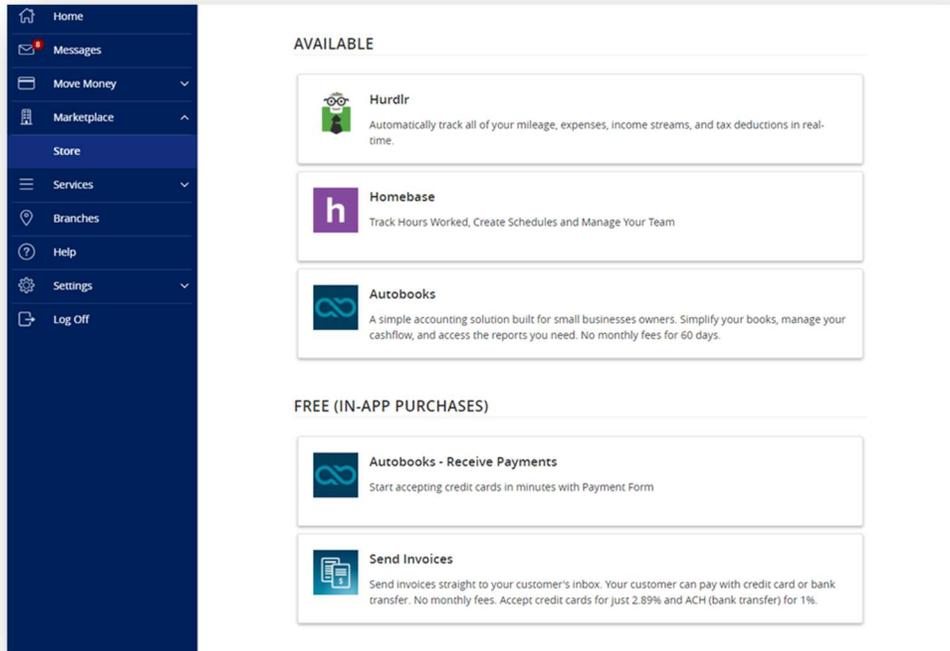
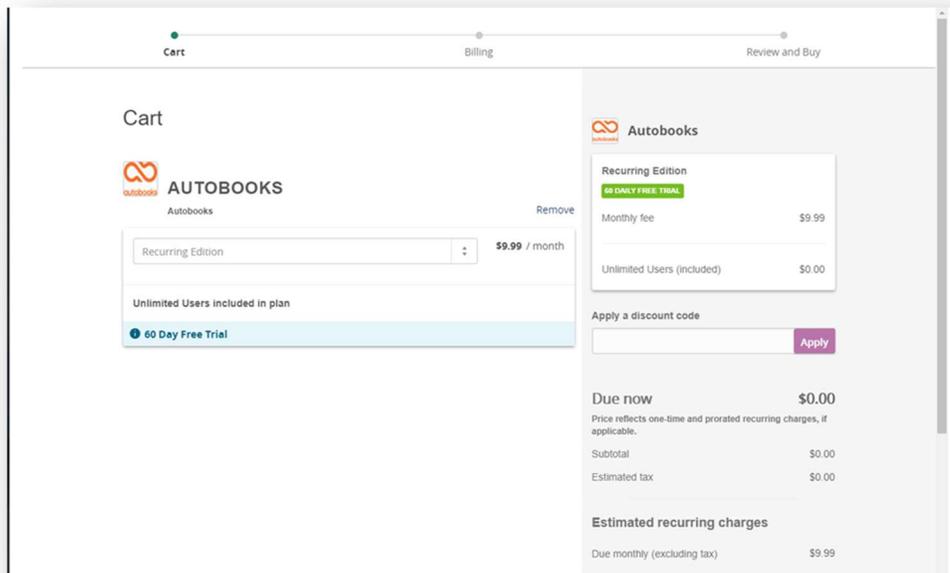
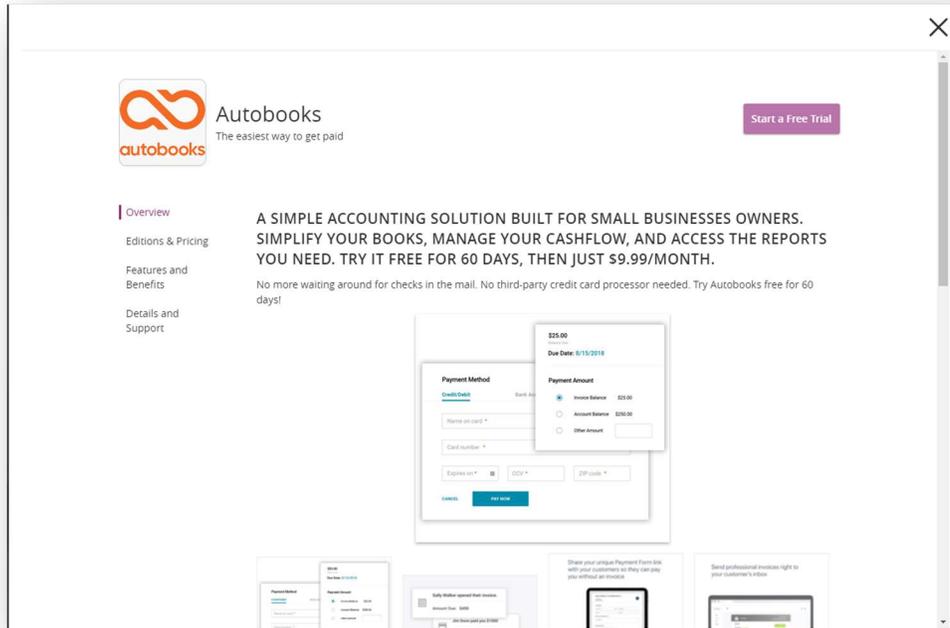


Self-Serve Enrollment from the Q2 Marketplace

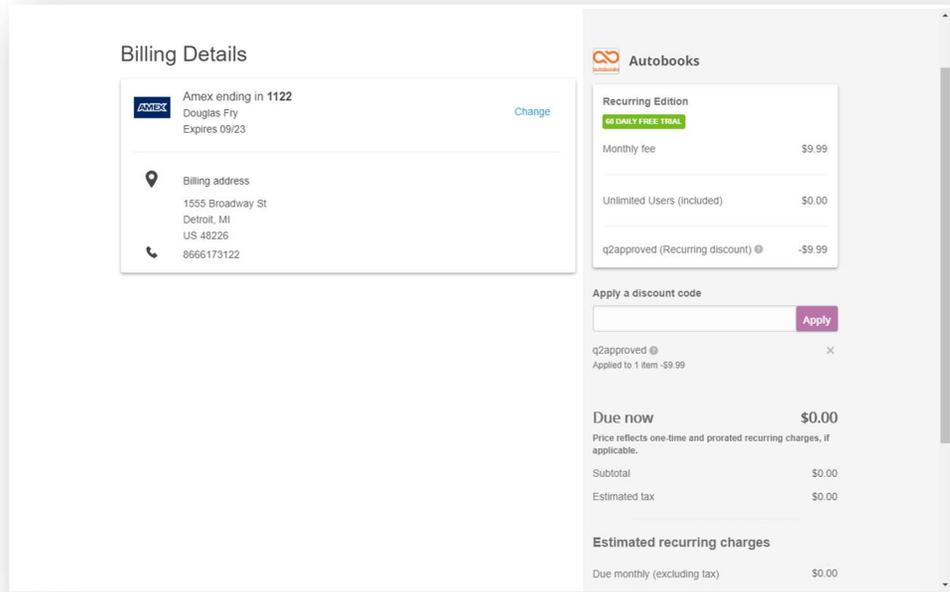
Autobooks offers simple, self-service enrollment online. To get started, a user must subscribe to an Autobooks app within the Marketplace. Begin by clicking on the app of choice:



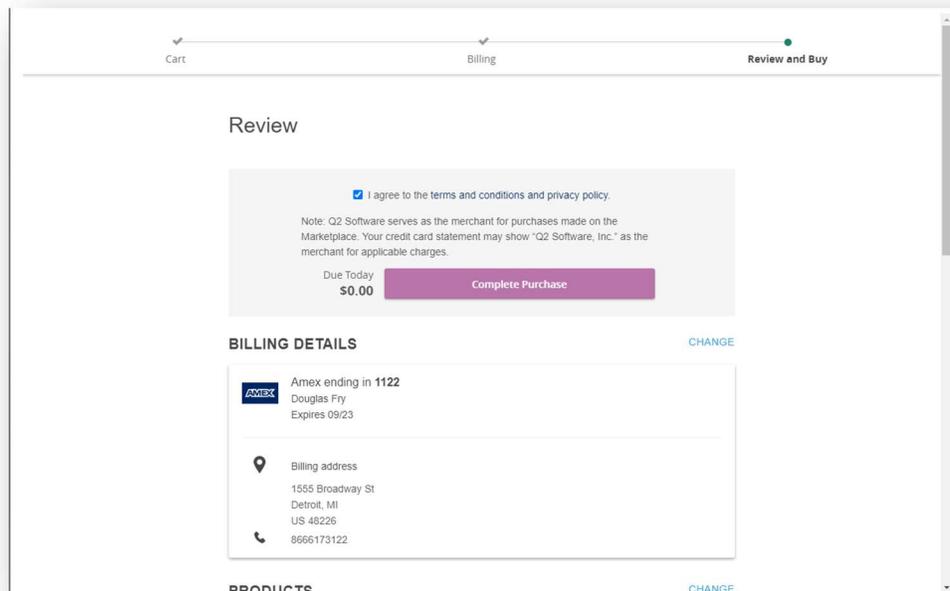
Then follow the Q2 Marketplace app subscription process:



The customer must input a credit or debit card number for any future in-app purchases:

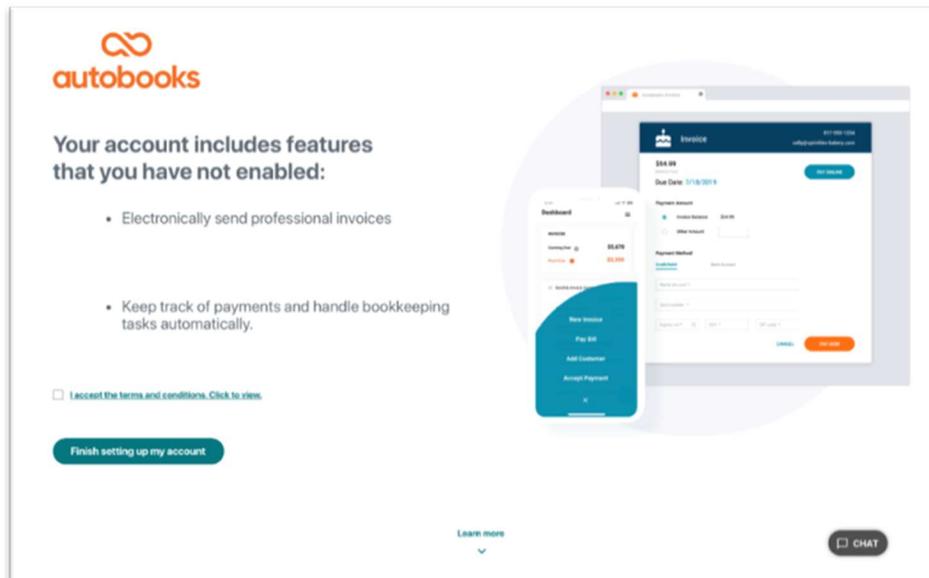


Q2's final step is for the customer to review their app selection and click the Complete Purchase button:



Here's a step-by-step guide on the Autobooks enrollment process:

Step 1: Once app has been purchased: accept Terms and Conditions to begin enrollment, then click 'Finish setting up my account'.



Step 2a: Provide information about your business so we can create your account within Autobooks.

Sign Up For Autobooks

● ● ●

Please confirm the Primary Business Owner information below.
If the information displayed is incorrect, or is missing, please provide updated information.

First Name * John	Last Name * Smith
Email * John@AUTOBOOKS.CO	Phone * 586-444-4444
Date of Birth * 04/04/1975	
SSN * XXX-XX-9999	?

What is the Primary Owner's home address?
Home address should not be a P.O. Box.

Home Address 1 * 12345 Broadway		
Home Address 2		
City * Detroit	State * MI	Zip Code * 48304-0000

Please confirm the business information below.

Business Name * Green Belle Lawncare	
DBA	?
<input checked="" type="checkbox"/> I do not have a DBA	
EIN / TIN	?
<input checked="" type="checkbox"/> My EIN is the same as my SSN	

Please use the business address registered with the IRS.

Business Address 1 * 12345 Broadway		
Business Address 2		
City * Detroit	State * MI	Zip Code * 48304-0000

[Back](#) [Next](#)

Step 2b: Complete the Autobooks enrollment page 2.

Business Information
● ● ●

Please provide the additional information below.

Company Formation Year * Business Structure *

Which industry does your business serve?
Industry *

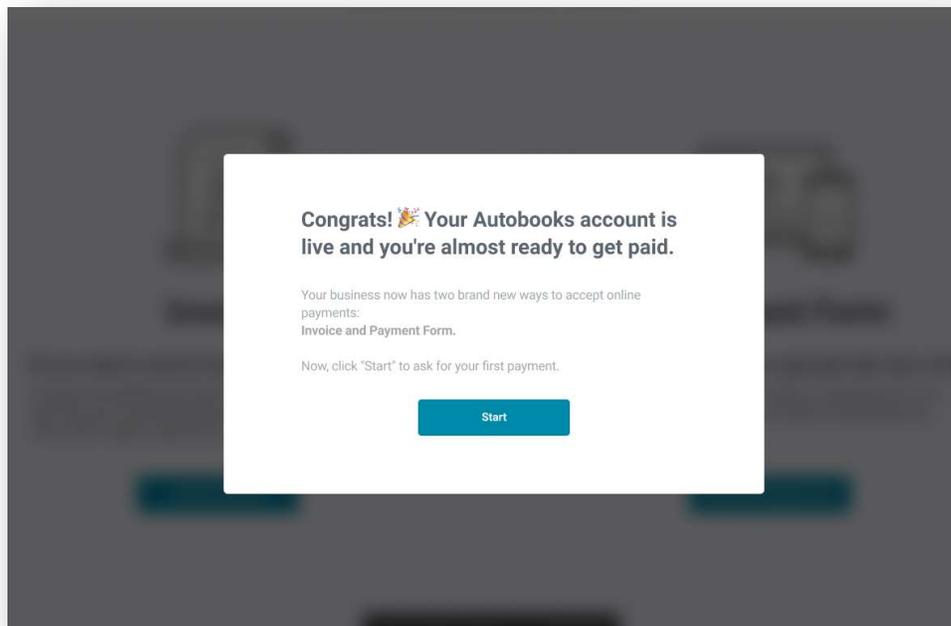
What is the largest single payment you expect to receive?
This could be from invoicing, donations, or however you expect to receive income and is just an estimate.

Largest Single Payment *

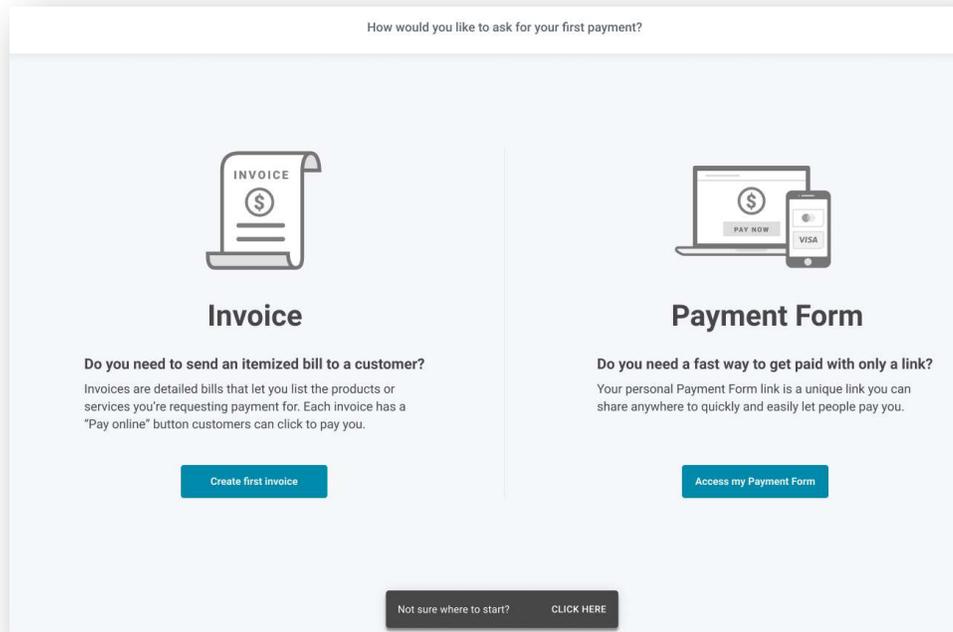
What is the average payment amount you expect to receive?
Average Payment *

What is your estimated annual revenue?
Estimated Annual Revenue *

[Back](#) [Submit](#)



Step 3: The user will choose to Create an Invoice or Access my Payment Form. If the user is unsure, we provide an informational pop-up explaining each.



3a) If the user chooses to create an invoice, Autobooks will teach the user how to successfully send an invoice to a customer. To begin, the user will add their customer's information.

Step 1/3: Add your customer's info

1 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

Customer's first name *

Customer's last name *

Customer's email *

Invoice due date *
08/13/2019

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.

[Previous](#) [Add billable items](#)

3b) Next, the user will add the name of the product or service they want to bill for.

Step 2/3: Add the products or services you're billing for

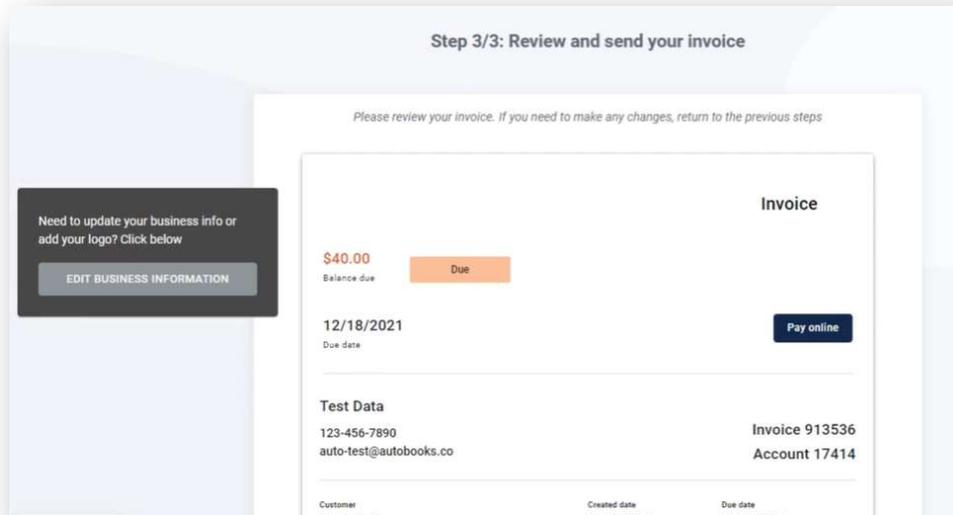
2 Now, tell us what you're invoicing for

<input type="text" value="Title of your product or service *"/>	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
---	--------------------------------	-------------------------------------	-------------------------------------

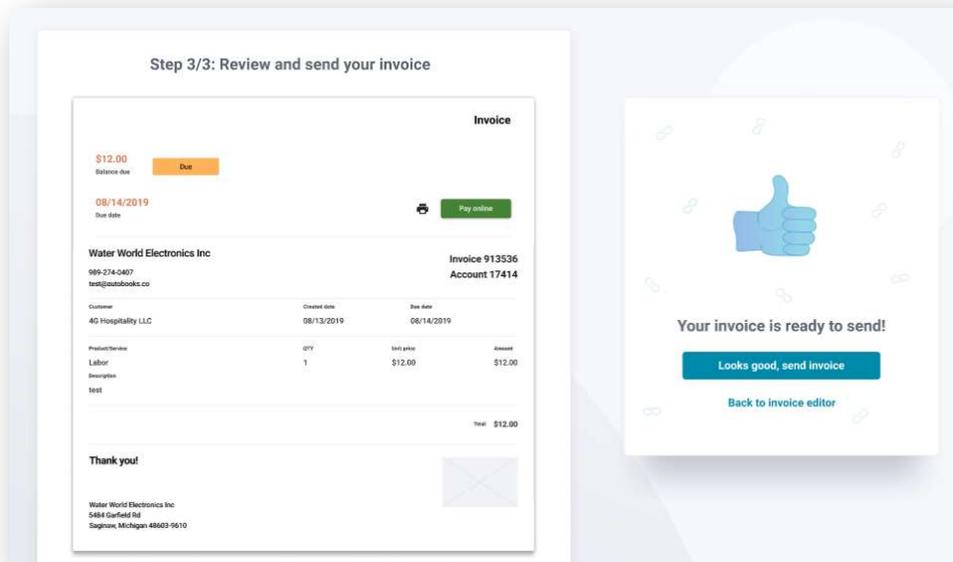
Total cost: \$0.00

[< Edit customer info](#) • [Save and review invoice >](#)

3c) The user may add their business logo and/or contact information to the invoice template.



3d) The last step for the user is to review the invoice and send it to their customer.



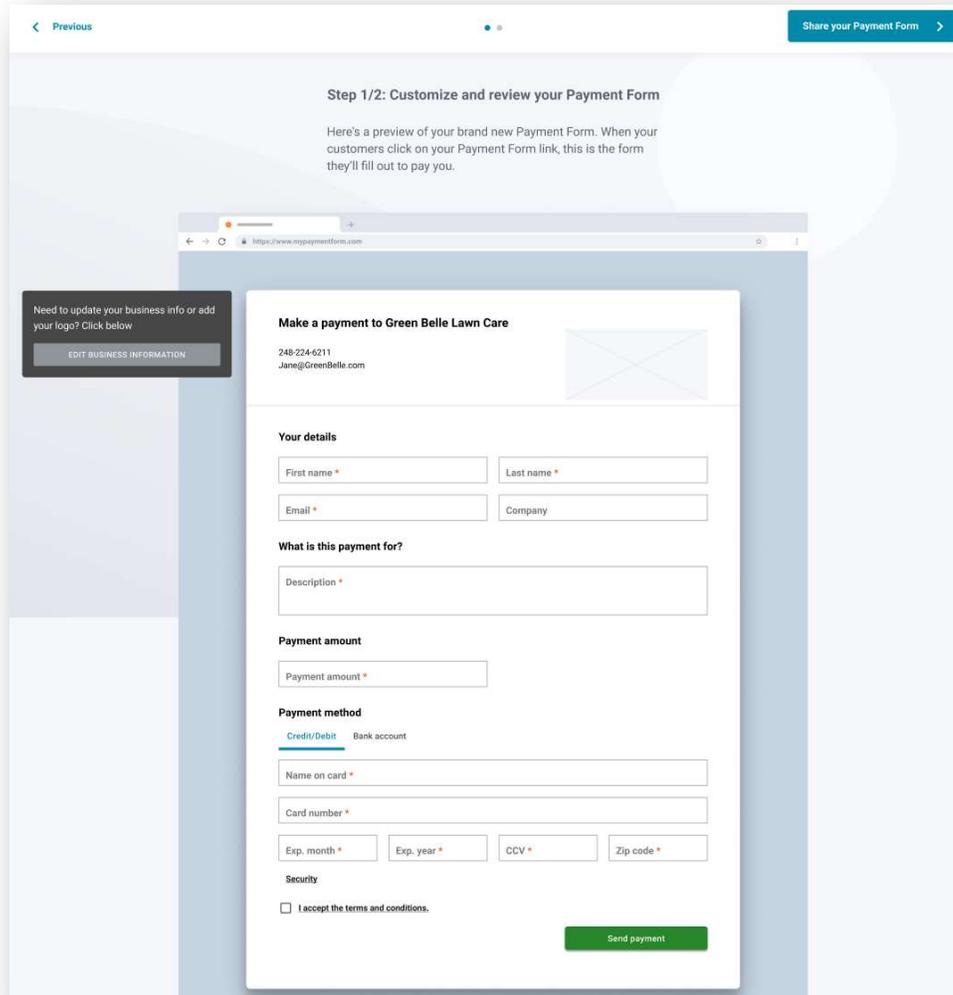


Congrats! Your first invoice is on its way to your customer.

You can now view your invoice in the invoice list, or explore the rest of Autobooks by visiting the dashboard.

[View invoice list](#) [Go to dashboard](#)

Step 4: Alternately, Autobooks will teach the user how to successfully complete the Payment Form.



The screenshot shows a web interface for customizing a payment form. At the top, there are navigation links: "< Previous" on the left and "Share your Payment Form >" on the right. The main heading is "Step 1/2: Customize and review your Payment Form". Below this, a paragraph reads: "Here's a preview of your brand new Payment Form. When your customers click on your Payment Form link, this is the form they'll fill out to pay you." The central focus is a preview of the payment form itself, which is displayed within a browser window frame. The browser's address bar shows "https://www.mypaymentform.com". The payment form has a title "Make a payment to Green Belle Lawn Care" and contact information: "248-224-6211" and "Jane@GreenBelle.com". A placeholder for a logo is shown as a box with an 'X'. The form is divided into several sections: "Your details" with fields for "First name *", "Last name *", "Email *", and "Company"; "What is this payment for?" with a "Description *" field; "Payment amount" with a "Payment amount *" field; "Payment method" with two options: "Credit/Debit" (selected) and "Bank account". Under "Credit/Debit", there are fields for "Name on card *", "Card number *", "Exp. month *", "Exp. year *", "CCV *", and "Zip code *". A "Security" section at the bottom has a checkbox for "I accept the terms and conditions." and a green "Send payment" button.

[Previous](#) [Share your Payment Form](#)

Step 1/2: Customize and review your Payment Form

Here's a preview of your brand new Payment Form. When your customers click on your Payment Form link, this is the form they'll fill out to pay you.

Need to update your business info or add your logo? Click below

[EDIT BUSINESS INFORMATION](#)

Make a payment to Green Belle Lawn Care

248-224-6211
Jane@GreenBelle.com

Your details

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

What is this payment for?

Payment amount

Payment method

[Credit/Debit](#) [Bank account](#)

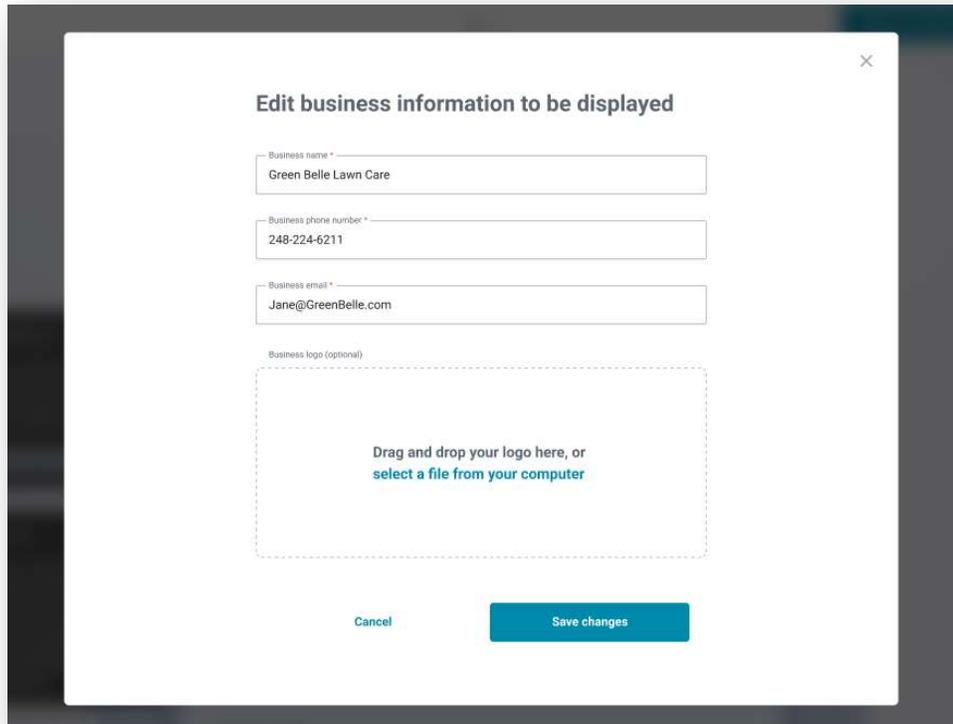
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------

Security

I accept the terms and conditions.

[Send payment](#)

4b): The user can edit their business information and add a logo for the Payment Form during the tutorial, which will be applied going forward.

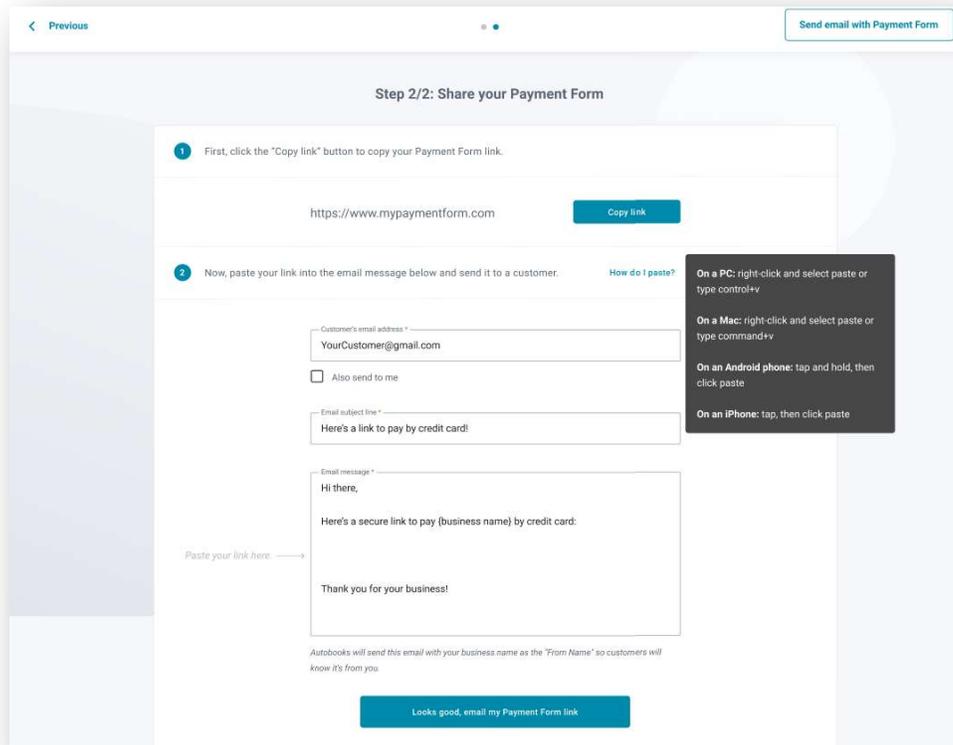


The screenshot shows a modal dialog box titled "Edit business information to be displayed" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Business name ***: A text input field containing "Green Belle Lawn Care".
- Business phone number ***: A text input field containing "248-224-6211".
- Business email ***: A text input field containing "Jane@GreenBelle.com".
- Business logo (optional)**: A dashed rectangular area containing the text "Drag and drop your logo here, or select a file from your computer".

At the bottom of the dialog, there are two buttons: "Cancel" and "Save changes".

4c): The user will learn how to copy their custom payment link and paste it into an email. To complete the tutorial, the user will email the payment form link to their customer.



Step 2/2: Share your Payment Form

1 First, click the "Copy link" button to copy your Payment Form link.

https://www.mypaymentform.com [Copy link](#)

2 Now, paste your link into the email message below and send it to a customer. [How do I paste?](#)

Customer's email address *
YourCustomer@gmail.com

Also send to me

Email subject line *
Here's a link to pay by credit card!

Email message *
Hi there,
Here's a secure link to pay (business name) by credit card:
Thank you for your business!

Paste your link here: →

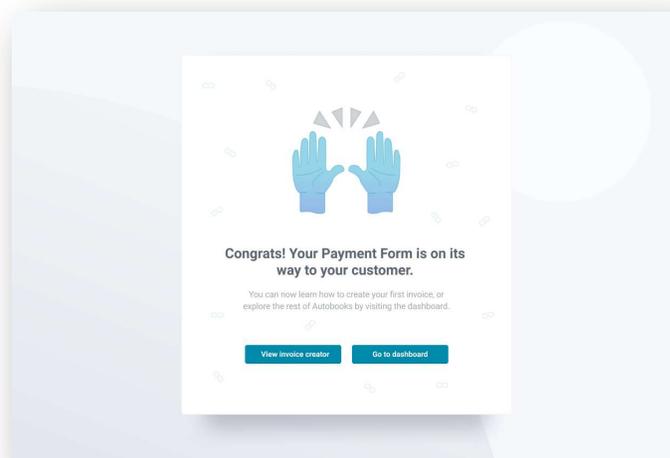
Autobooks will send this email with your business name as the "From Name" so customers will know it's from you.

[Looks good, email my Payment Form link](#)

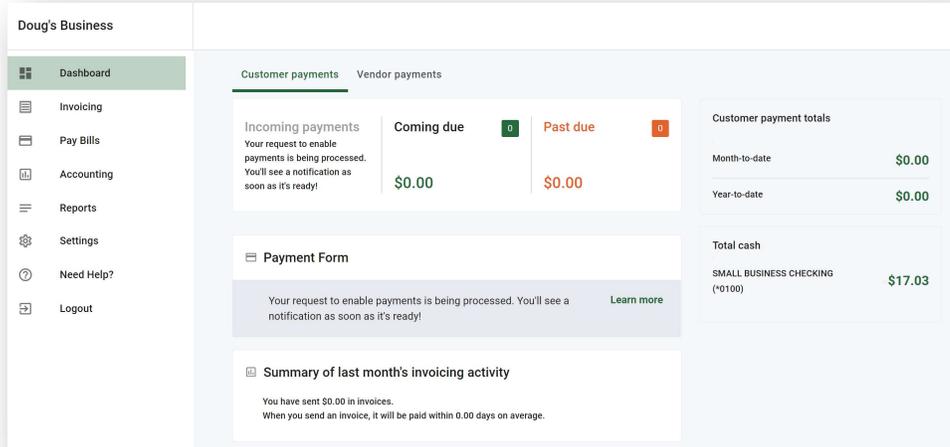
[Send email with Payment Form](#)

How do I paste?

- On a PC: right-click and select paste or type control+v
- On a Mac: right-click and select paste or type command+v
- On an Android phone: tap and hold, then click paste
- On an iPhone: tap, then click paste



Finished! You will now see the Autobooks dashboard.



The screenshot shows the Autobooks dashboard for 'Doug's Business'. The left sidebar contains navigation links: Dashboard (selected), Invoicing, Pay Bills, Accounting, Reports, Settings, Need Help?, and Logout. The main content area is titled 'Customer payments' and 'Vendor payments'. It features three main sections: 'Incoming payments' with a notification about enabling payments, 'Payment Form' with a similar notification and a 'Learn more' link, and 'Summary of last month's invoicing activity' with a note about invoice payment terms. On the right, there are two summary boxes: 'Customer payment totals' showing \$0.00 for month-to-date and year-to-date, and 'Total cash' showing \$17.03 for 'SMALL BUSINESS CHECKING (*0100)'.

Customer payment totals	
Month-to-date	\$0.00
Year-to-date	\$0.00

Total cash	
SMALL BUSINESS CHECKING (*0100)	\$17.03