autobooks

Autobooks Module Self-Service Enrollment

Autobooks offers simple, self-service enrollment online. To get started, a user simply navigates to the Autobooks portion of online banking.

ENROLLMENT TAKEAWAYS:

» Business owners can enroll 24 hours a day, 365 days a year

» Autobooks Terms and Conditions must be accepted to enroll

Step 1:

» The business owner will click on Send an Invoice or Accept a Payment within online banking. The Terms and Conditions will display and allow the user to select which checking account they wish to deposit funds (if the user has more than one checking account with the financial institution).
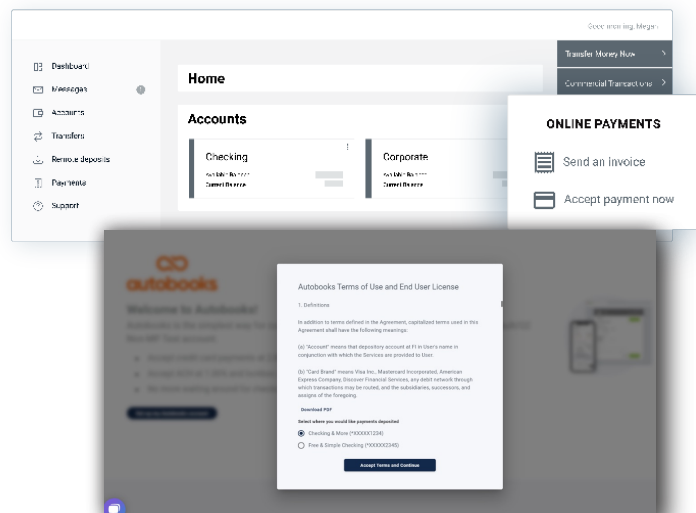
*The background of this screen has been blurred intentionally to the user.
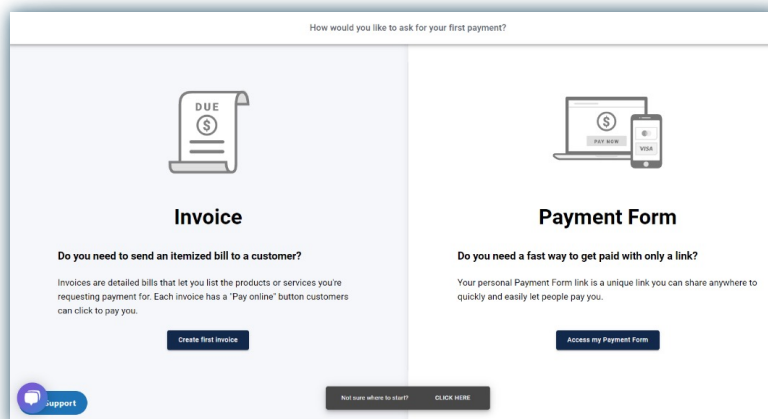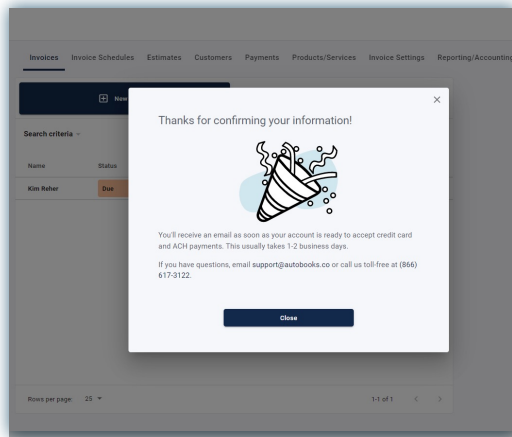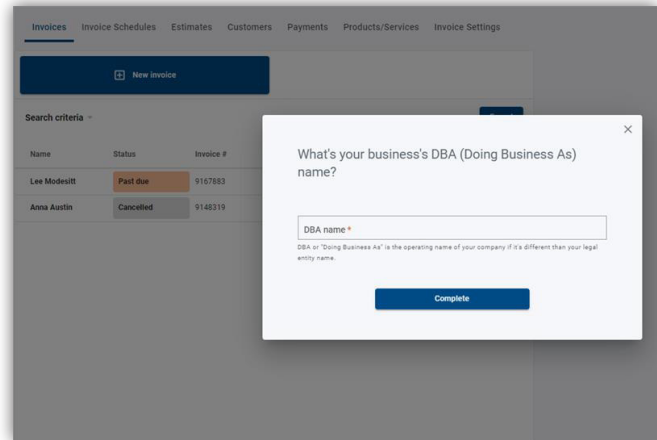
Step 2:

» The user will be taken to a short tutorial. They will choose to either create an invoice or access their payment form.

Step 3:

» If Autobooks is missing key data for the business, we will ask for the information within the module. *Key data could be the owner name, phone number, date of birth, SSN, or home address of the business and/or business owner.

Step 4:

» A confirmation will appear when key data has been entered. The user may click away from the key data gathering model at any time before completion.

» The reminder will apear If additional information is needed. Once clicked, a form will be presented with basic questions for the user to fill out.

» If the user does click away, there will be a persistent (clickable) reminder message. The user cannot process their first payment without providing this information.