

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.

*Note: This process applies to those Financial Institutions that use Vantiv Worldpay as their payment processor.

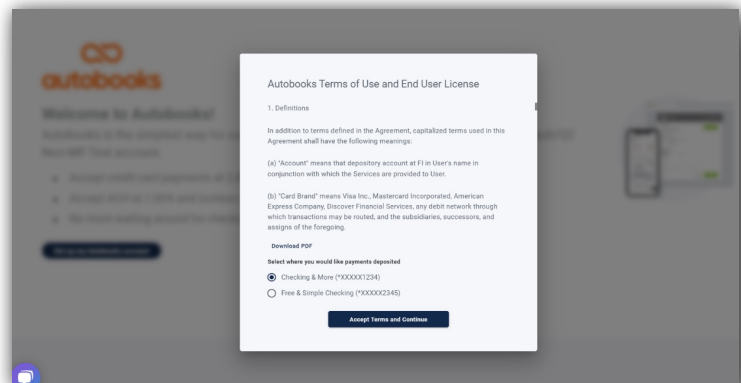
For all other payment processors, please see our non-Vantiv guide.

ENROLLMENT TAKEAWAYS:

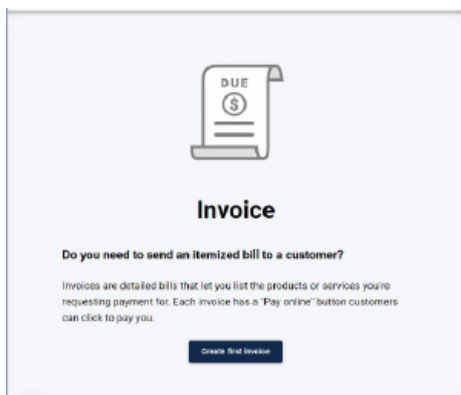
- » Business owners can enroll **24 hours** a day, **365 days** a year
- » Autobooks Terms and Conditions must be accepted to enroll

Step 1:

» The business owner will click on Invoicing or Payments within **online banking**. Then choose a module of their choice. 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.



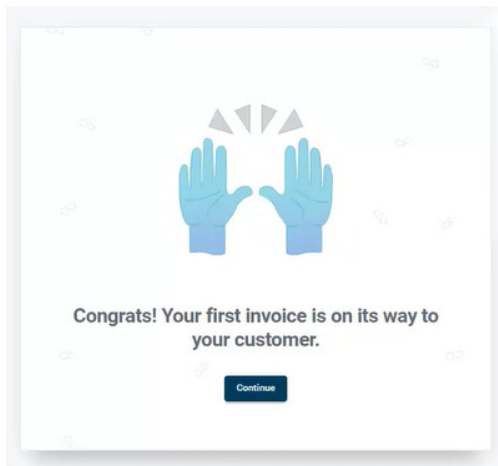
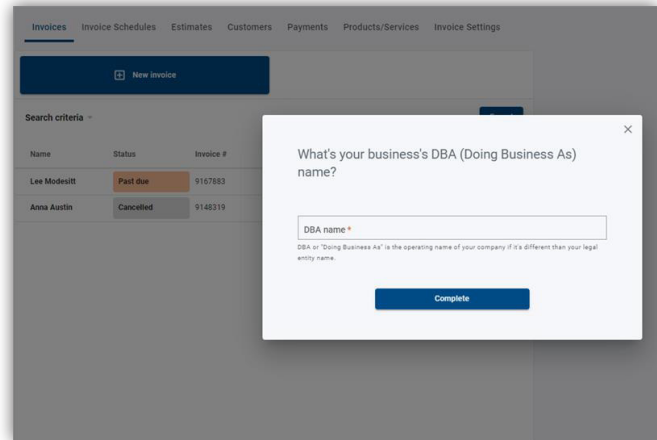
Step 2:

» The user will be taken to a short tutorial. They will choose to 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.

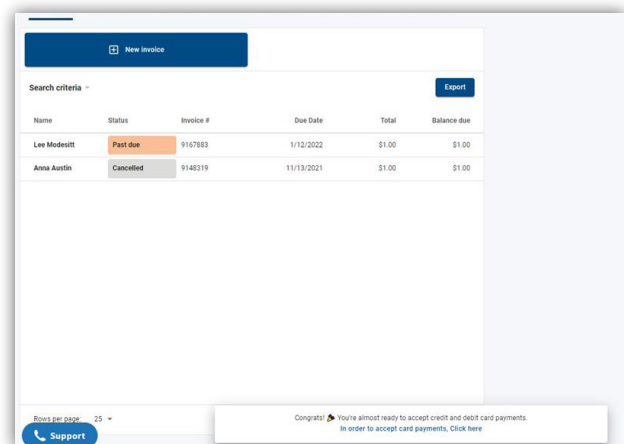


Step 4:

» 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 appear if additional information is needed. Once clicked, a form will be presented with basic questions for the SMB to fill out.

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



Once complete, the user can upgrade their Autobooks experience with additional features!

To add Accounting, Reporting and other features the business owner must click the tab labeled "Reporting/Accounting". They will see monthly subscription and processing rate information, and click "Activate Autobooks" to complete their upgrade. Once activated, the business owner will see the traditional Autobooks view!

The screenshot shows the 'Reporting/Accounting' tab selected in the top navigation bar. Below the navigation is a 'New Invoice' button and a search criteria section with an 'Export' button. The main content is a table of invoices with columns for Name, Status, Invoice #, Due date, Total amount, and Balance due.

Name	Status	Invoice #	Due date	Total amount	Balance due
Cahyn Warren	Due	934248	02/22/2020	\$242.00	\$242.00
Gladys Alexander	Due	934265	02/15/2020	\$73.00	\$73.00
Diane McCoy	Partial payment	934363	02/04/2020	\$257.00	\$170.00
Randall Miles	Active	934250	01/28/2020	\$185.00	
Johnny Pena	Due	934398	01/28/2020	\$67.00	\$67.00
Ronald Webb	Paid	934327	01/24/2020	\$218.00	\$0.00
Serenity Fisher	Past Due	934276	01/23/2020	\$115.00	\$115.00
Nathan Wilson	Active	934268	01/23/2020	\$92.00	\$0.00
Bessie Hawkins	Cancelled	934373	01/17/2020	\$214.00	
Marvin Russell	Partial payment	934274	01/17/2020	\$235.00	\$30.00

The screenshot shows a dashboard titled 'Missing Info Core Provider Mock'. It features a sidebar with navigation options: Dashboard, Invoicing, Payment Form, Pay Bills, Accounting, Reports, Settings, Need Help?, and Mobile View. The main content area is divided into 'Customer payments' and 'Vendor payments' sections. The 'Customer payments' section displays a summary of incoming payments (\$0.00), coming due (\$20.00), and past due (\$0.00). It also includes a 'Payment Form' section with a link to a payment page and a 'Summary of last month's invoicing activity' section.

Customer payment totals

Month-to-date	\$0.00
Year-to-date	\$0.00
Total cash	
Checking & More (*1234)	\$110.00
Free & Simple Checking (*2345)	\$220.00