

Autobooks Standard Self-Service Enrollment

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

ENROLLMENT TAKEAWAYS:

- » Businesses can self-service online **24 hours** a day, **365 days** a year
- » Clicking the Autobooks link **does not** automatically enroll a business

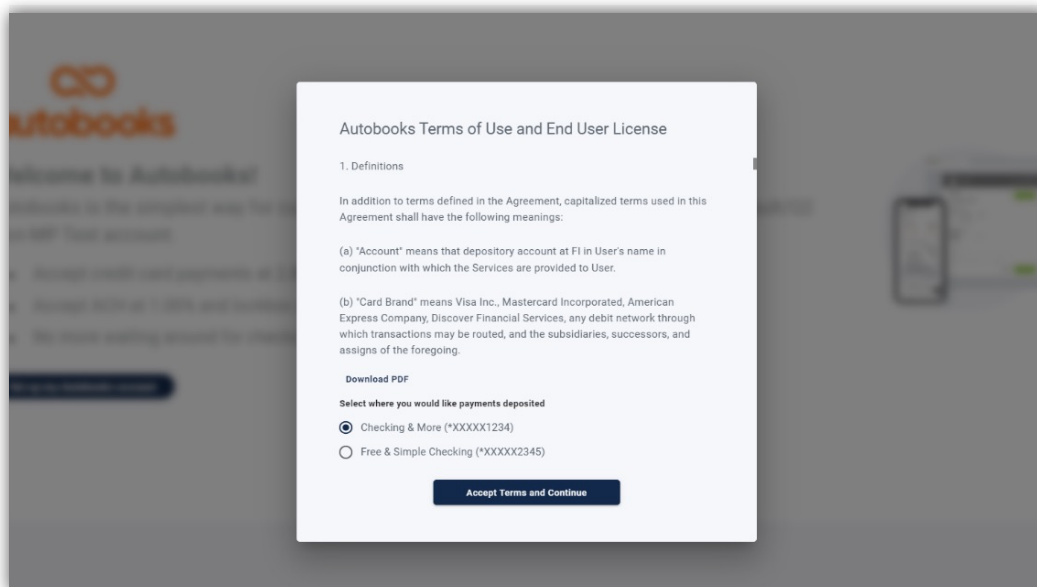
Check out the step-by-step enrollment process below:

Step 1:

- » The new user will click on Autobooks from their **online banking platform**.

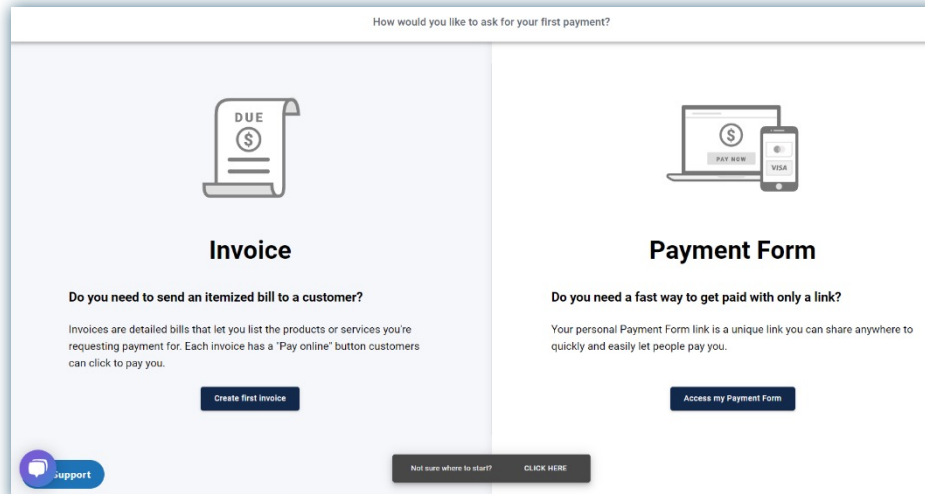
The Terms and Conditions modal will display and allow the user to select which checking account they wish to deposit funds (if user has more than one checking account with the financial institution).

- » NOTE: The background of this screen has been blurred intentionally to the user.



Step 2:

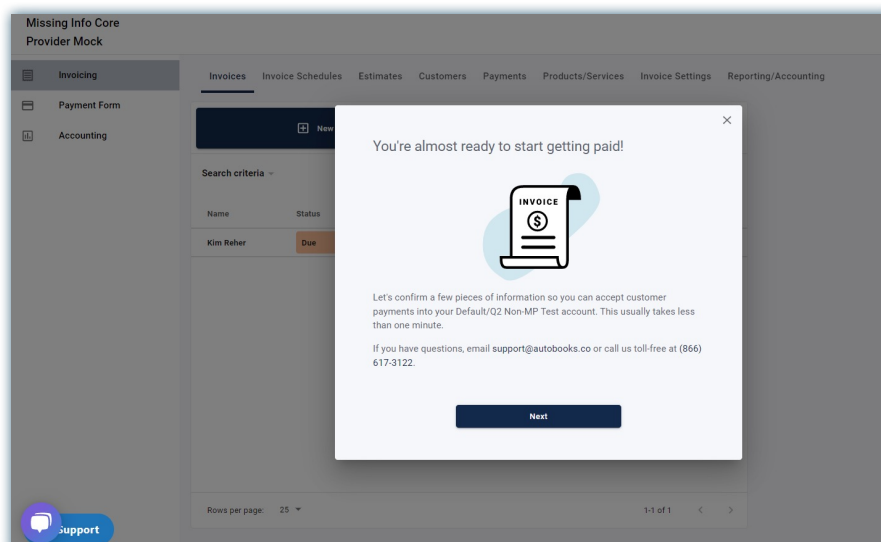
» The user will be taken **directly** to First Time Invoicing or Payment Form.



Step 3:

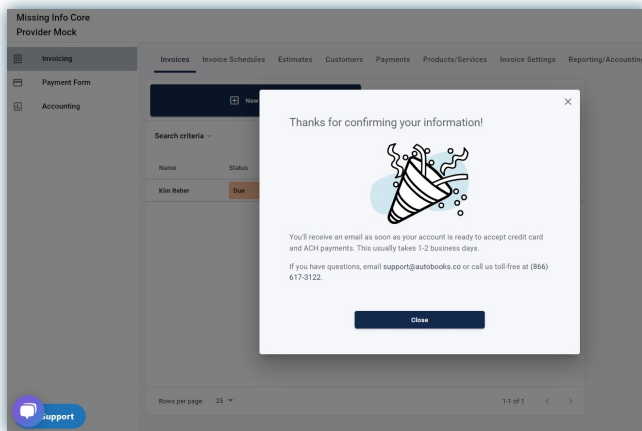
» Once the user completes FTI or FTPF, they will see the “Freemium” version of Full Autobooks. If we are missing key data for the business, we will display a modal asking for this data.

Key data is: The full name, phone number, date of birth, SSN, or home address of the business and/or business owner.



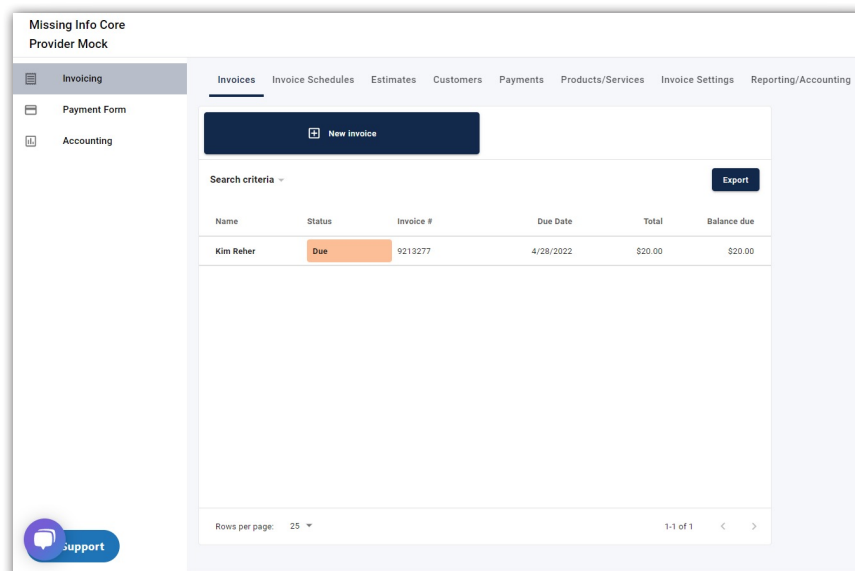
Step 4:

» User will see a confirmation once the **key data** has been entered. The user may click away from the key data gathering modal at any time before completion. If the user does click away, there will be a **persistent (clickable) reminder message** that key data is required for payment processing approval.



Step 5:

» The user will see the “**Freemium**” version of Autobooks. This version will show the full **Invoicing and Payment Form** functionality, with all other Autobooks traditional tabs repressed.



Once complete, you have the option to **upgrade** your Autobooks experience with additional features!

To add **Accounting, Reporting and other features** the business owner must click the tab labeled “Accounting”. This tab will provide the business owner with clear subscription and processing rate information, with a call to action to “Activate Autobooks”.

Once activated, the business owner will see the traditional **Full Autobooks view!**

Welcome to Autobooks

Autobooks is the simplest way to manage your books - right inside your business checking account. With the Autobooks accounting suite of tools it's easy to automate your accounting and access reports like:

- Automate accounting entries
- Access real-time financial reports
- Keep track of your customer balances
- Export reports for your accountant

\$ Accept credit card payments at 3.49%
 Accept ACH at 1.00% and lockbox at 1.99% (\$10.00 cap)
 No more waiting around for checks in the mail
 Just \$9.99/month

⚙ Automate tedious bookkeeping tasks with transaction matching and categorization features

📊 Gain access to financial reports that help you manage the health of your business

✍ Create and edit income categories for your invoices and expense categories for your bill payments

🌐 Link third-party financial accounts to get a holistic snapshot of your business finances

Activate Autobooks

Need to chat? You can call us at **(866) 617-3122** or send us an email at [support@autobooks.com](#)

Congrats! 🎉 You're almost ready to get paid directly into your Default/Q2 Non-MP Test account.
Click here to confirm your information.

Missing Info Core Provider Mock

Dashboard | Customer payments | Vendor payments

Invoicing
 Payment Form
 Pay Bills
 Accounting
 Reports
 Settings
 Need Help?
 Mobile View

Incoming payments \$0.00
Coming due \$20.00
Past due \$0.00

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

Payment Form [Learn more about Payment Form](#)
 Send this link to customers to allow them to pay online:
<https://dev.autobooks.co/pay/missing-info-core-provider-mock-391> [Copy](#)

Summary of last month's invoicing activity
 You have sent \$0.00 in invoices.
 When you send an invoice, it will be paid within 0.00 days on average.

[Load more](#)

Support