autobooks

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

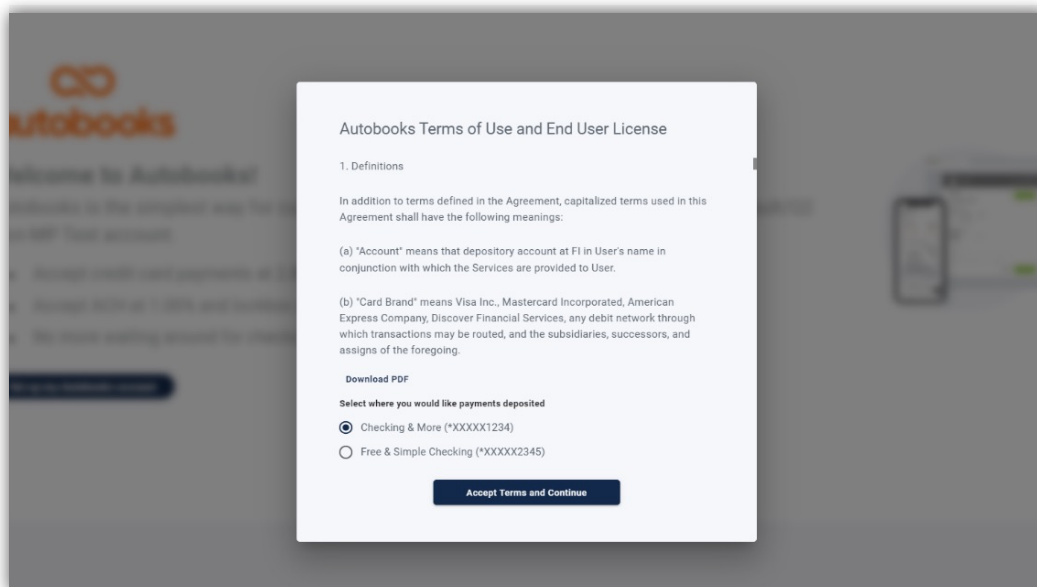» Clicking the Autobooks link does not automatically enroll a business

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

Step 1:

» The new user will click on Autobooks from their online banking platform.
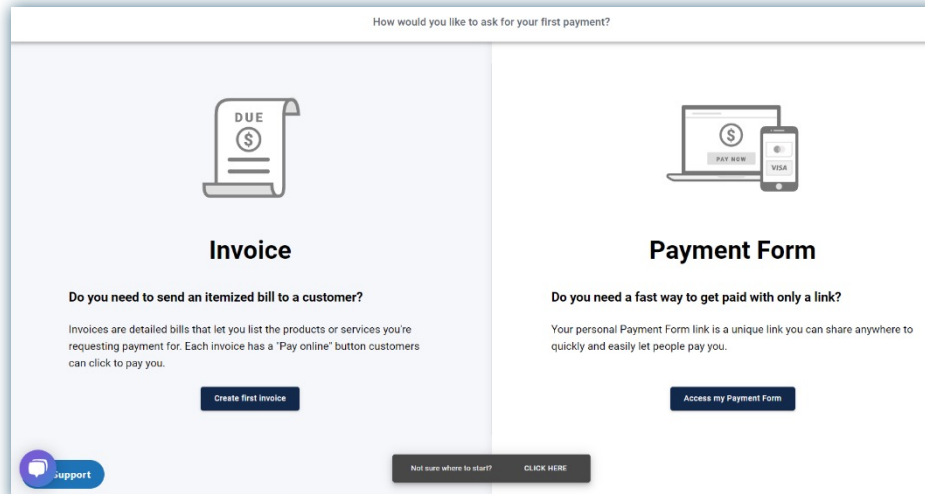
The Terms and Conditions modal will display and allow the user to select which checking account they wish to deposit funds (if user has more than one checking account with the financial institution).

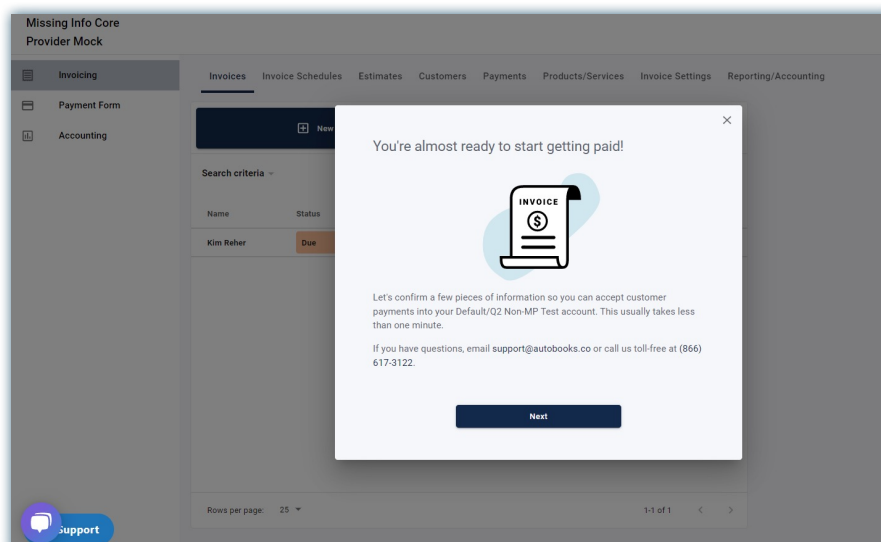» NOTE: The background of this screen has been blurred intentionally to the user.

Step 2:

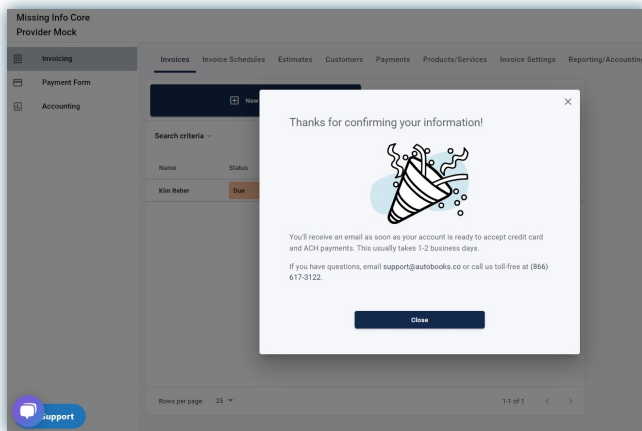» The user will be taken directly to First Time Invoicing or Payment Form.

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.
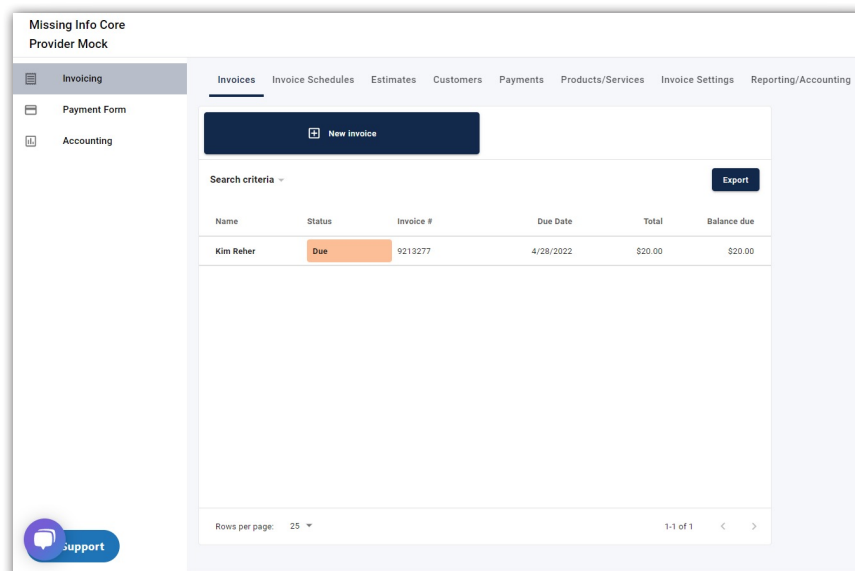
Step 4:

» 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.

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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!