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. Businesses can self-service online, 24 hours a day, 365 days a year.

Follow the step-by-step enrollment process for Autobooks below:

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).

   > NOTES: You'll need to accept the Terms of Service within Autobooks. At this time, you'll be able to interact with the Autobooks tools, however you will not be able to start accepting payments quite yet. (If you chose our Send An Invoice tool, you will go through our First Time Invoice experience).

   > When you're ready to begin taking payments through Autobooks, you can either click the pop-up message

   > to complete missing information or click to begin requesting payments. You'll see a pop-up (similar to the one on the right) in order to complete any missing information and your information will be sent over to Autobooks to complete your request.

   > Key data that may be requested could include: Your Full name, phone number, date of birth, SSN, or home address of the business / business owner.

You're almost ready to start getting paid!

Let's confirm a few pieces of information so you can accept customer payments into your MidFirst Bank account. **Please provide only primary business owner information.** This usually takes less than two minutes.

If you have questions, email **support@autobooks.co** or call us toll-free at **(866) 617-3122**.

Next
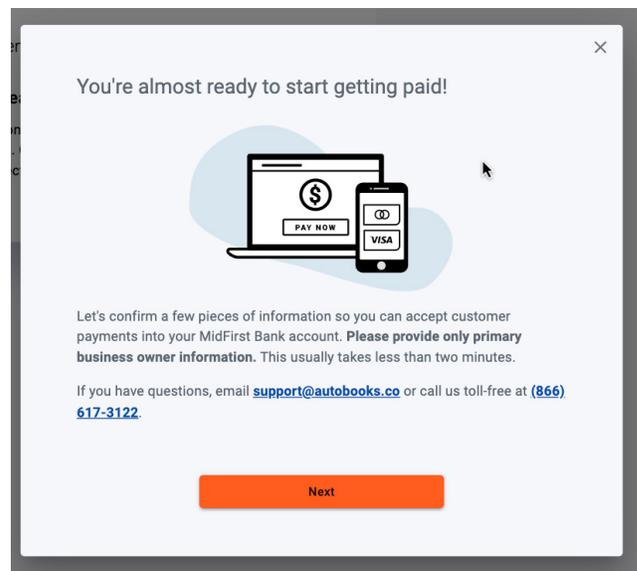
2. One completed, the user will see a confirmation that the key data has been entered and submitted.

> Our onboarding team begins reviewing the information about your business we received when you enrolled in order to approve your business for accepting payments digitally.
>
> *There is the possibility that the team may need to validate some of this information before we can finish payment enablement. Please be on the lookout for a call or voicemail from a member of our Customer Success team to review the information you provided.*
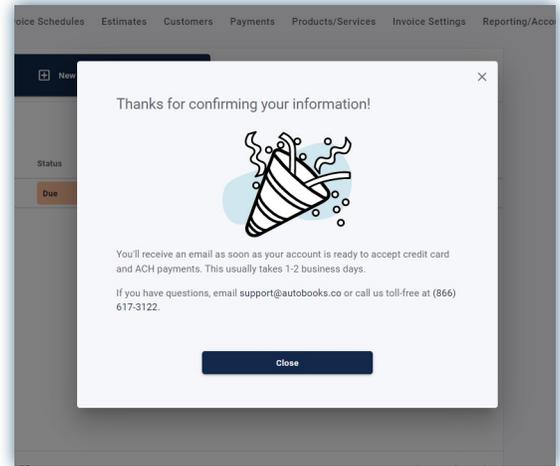
3. Once information has been verified, you can expect two separate automated emails from Autobooks:

> The first email will let you know that your ability to collect online bank account payments (ACH) has been successfully enabled
>
> The second email will let you know that your ability to collect card-based payments (credit and debit cards) has been enabled

> After receiving both emails, your account will be fully configured and you'll be able to start accepting online payments!
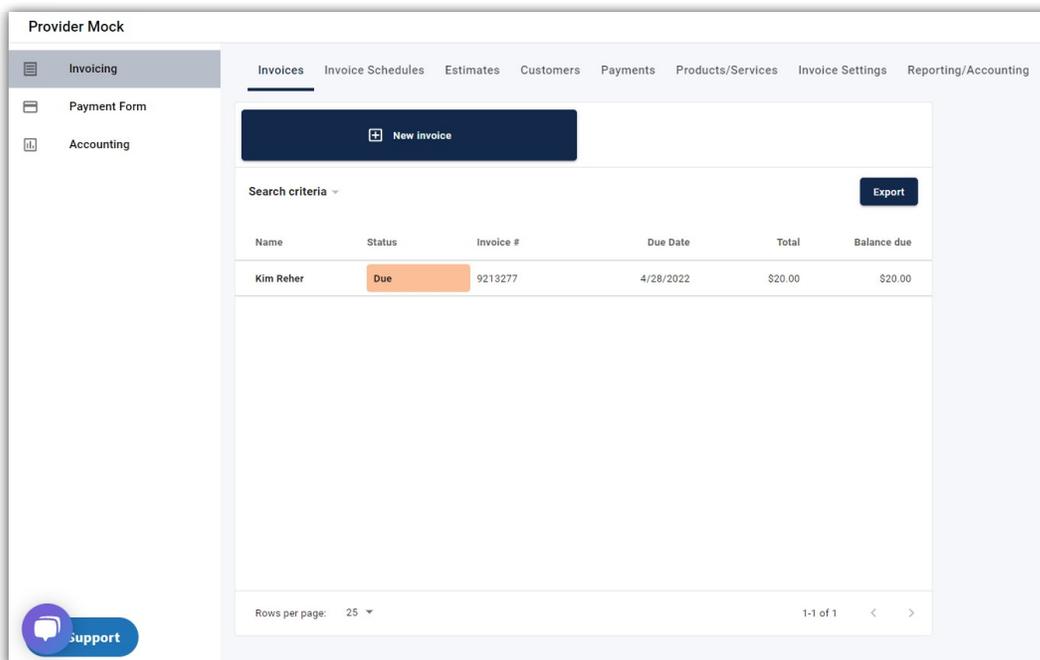
Once complete, you have the option to upgrade your Autobooks experience with additional features!

To add Account, 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!