Send Invoices/
Accept Payments Now

Below are a few questions you and your team may be asked about the Send Invoices and Accept Payments Now modules that appear in Banno. As always, if you face any questions that you'd like help answering, don't hesitate to forward them over to the Autobooks support team at Support@Autobooks.co, or at 866-617-3122.

Q: What is Send Invoices?

A: Send Invoices is a module that allows you to send an invoice to a customer, and collect payment electronically (credit card, debit card, bank transfer) for that invoice.

Q: What is Accept Payments Now?

A: Accept Payments Now is a module that provides you with a unique payment link. This payment link leads to a payment form (displayed in a secure web browser). Your customers (or donors, if you have a non-profit organization) complete the form to send you a payment (or donation) electronically. This module is perfect for those businesses that need a flexible way to accept payments from customers, yet don't create invoices.

Q: Who are the modules for?

A: The customer must have access to online banking to enroll in either module. The following types of businesses are great fits:

- Any business that sends a bill/ invoice for its product or service.
- Service based businesses.
- Non-profits seeking to collect donations online.

Q: What are the benefits to using the Send Invoices module?

A: With this module, you can:

- Create professional, custom invoices and send them electronically or physically to your customers in seconds.
- Accept payments by credit card, debit card, or bank transfer direct to your bank account.
- Keep track of which customer has paid you, and how much.

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Q: What are the benefits to using the Accept Payments Now module?

A: With this module, you can:

- Share your custom payment link everywhere you communicate with customers: via text message, email, on your business website, and social media.
- Use the Accept Payment Mobile App (available for both Android and iOS) to collect payments when meeting with customers face to face.
- Accept payment by credit card, debit card, or bank transfer direct to your bank account.
- Keep track of which customer has paid, and how much.

Q: How do I sign up to try it?

A: You can enroll right inside of online banking by clicking on the module to get started. If you need assistance, you can also contact the Autobooks team at Support@autobooks.co.

Q: How is Autobooks involved with these modules? Is Autobooks working with my financial institution? Is this safe?

A: Yes! Autobooks has partnered with your financial institution to bring customers who own a business the best invoicing and accounting platform available on the market and now we've partnered together to offer two more options to interact with Autobooks technology. The modules exceed industry standard security to protect customer information and are supported by Autobooks outstanding customer support team.

Q: Do I have to download any software to use either module?

A: No downloads of any kind are required. The modules live completely inside of online banking.

Feel free to email the Autobooks team any time at Support@autobooks.co or call them between 9 a.m. and 6 p.m. Eastern time at 866-617-3122.

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