autobooks

Starting the Conversation

How do your clients pay you?

Invoice or Collect Payments for goods/services — Great Fit! Here's why:

- Create custom, professional invoices and email to clients.
- Customize invoice templates with logos, color, and personal messages.
- Accept payments right in online banking.

Collect Payments in person — Now an option!

- Tap to Pay on iPhone is available for iPhone users
- Take contactless payments in the moment via card or digital wallets.

Donations for Non-Profits and Associations — Also a Great Fit!

- Payment Form can be embedded in web pages, social media, email or text.
- Donations via credit card, debit card, or ACH.
- Transaction fees are generally less than larger crowdfunding sites.

My employees need to be able to collect in person card payments as well

> Autobooks has you covered! You can grant access your employees and have them download the Tap to Pay standalone app through the iOS app store which allows them to collect payments on behalf of your business.

What if your client wants to pay you with a credit or debit card?

Currently using Square or PayPal

> How much does your vendor cost you (transaction rates, transaction fees, monthly subscriptions, etc)? Autobooks rate is highly competitive to a vendor's "card not present" rate.

> How quickly is the money you earned deposited into your bank account? Autobooks payments are deposited to your account within 1-2 business days for no extra fee and no extra transfer work.

Internal Use Only

I don't offer credit or debit

> Why not? Autobooks doesn't require hardware or any new software. It's easy for you and the client to use, is 100% secure and PCI compliant. We eliminate manual bookkeeping, and customer payments are received faster than waiting on snail mail.

> Autobooks is securely located in online banking, with no contracts to sign or long-term oblications.

Can my clients pay with their cards via digital wallets?

> Absolutely! When using Tap to Pay on iPhone, you or your employees can collect contactless enabled payments via credit or debit card, or via digital wallets such as Apple Pay.

What if your client wants to pay with ACH or bank transfer?

Bank transfer? I've never been able to offer that!

> Now you can! With Autobooks, clients can pay you directly from their bank account. Works well for those clients that normally pay with a check, don't have a checkbook, or don't use a credit card.

How do you track client payments?

Manually — a great fit for Autobooks! Here's why:

> The Dashboard shows recent payment activity at a glance.

> The Invoice page contains a complete list of your clients and their payment status. You can see the activity history of the invoice (date sent, date received, date client viewed invoice) to track payment progress. You can resend the invoice via email, or cancel the invoice.

> For regular customers (such as those billed monthly) you can set a recurring invoice to be emailed on a regular cadence. Set it and forget it!

> Invoice templates can be set up with automatic reminder emails that are triggered if payments are not received.

Third party accounting tools — does your current tool provide the right set of features you need? Too many? Not enough?

> Autobooks was designed with small business in mind. The features have no “bloat” and are easy to use.

Would you like to learn more about Autobooks?

Yes! Autobooks is located inside your online banking account and it only takes 5 minutes. Log in and I’ll show you how.