

HOSTED BY: AUTOBOOKS TRAINING

The Basics of Autobooks

BEFORE YOU BEGIN:

- There are several slides with animations in them. Make sure to present content in this deck using Presenter Mode.

TO BEGIN:

Explain to the audience that your online bank provider has partnered with Autobooks to provide exciting new payment acceptance tools for your customers that own small businesses.

Take time to review any sales goals or initiatives that your company is introducing around these new tools (if any).

GO TO NEXT SLIDE.

Agenda

- | The Value of Autobooks
- | Autobooks Feature Overview
- | Available Resources
- | Open Discussion / Q&A

*ANIMATIONS ON THIS SLIDE

Review the agenda items with the audience.

EACH AGENDA ITEM ENTERS ON CLICK

GO TO NEXT SLIDE.



The Value of **Autobooks**

Before we dive into WHAT the tools do, let's see WHY these tools provide value to our customer; and HOW these tools help us achieve goals too.

GO TO NEXT SLIDE.



AUTOMATIC ANIMATIONS ON THIS SLIDE

With the Autobooks solution, the customer now has the tools for:

- Digital invoicing
- Online payment acceptance
- Cash flow management
- Automated accounting
- Financial reporting.

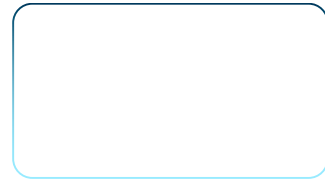
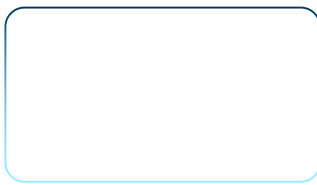
And the business gets paid faster! 95% of digital invoices get paid by a customer within 5 days of receipt. This means your business owner sees working capital in their bank account more quickly than traditional paper invoices.

GO TO NEXT SLIDE.

Why do businesses “hire” Autobooks to get paid?

So why would a business or organization use or “hire” Autobooks to get paid? Here are the top four reasons why customers use Autobooks:

GO TO NEXT SLIDE



Why do businesses “hire” Autobooks to get paid?

Reason # 1

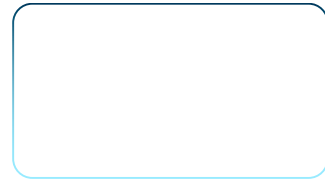
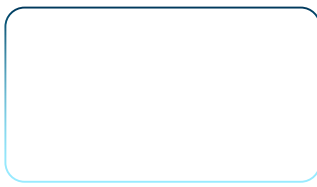
“Add a simple and trackable way to get paid into my existing system.”



- » Business owners are happy with their admin tools, but unhappy with payment processing products.
- » Business owners are looking for a platform that is simple and easy to use
- » Autobooks can easily be incorporated into their current setup

READ SLIDE AS-IS

GO TO NEXT SLIDE



Why do businesses “hire” Autobooks to get paid?

Reason #2

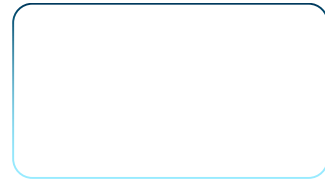
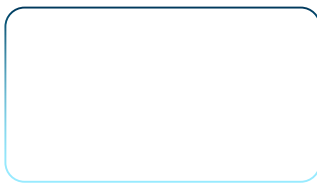
“Help me get back to offering credit cards to my customers.”



- » Processing cash and checks is a slower, more tedious process
- » Digital payments allow business owners to accommodate a wider range of customers
- » Business owners are not always completing transactions in-person

READ SLIDE AS-IS

GO TO NEXT SLIDE



Why do businesses “hire” Autobooks to get paid?

Reason #3

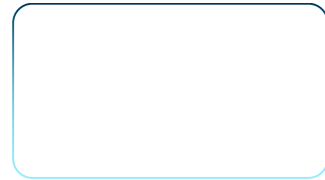
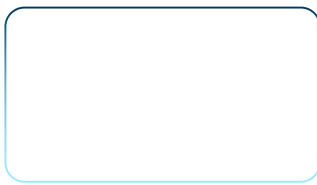
“Make it easy to get started with invoicing and accepting payments.”



- » New business owners can avoid getting bogged down with researching payment tools
- » Business owners can avoid signing up for multiple payment processing platforms
- » Autobooks provides tools that accommodate all their business needs

READ SLIDE AS-IS

GO TO NEXT SLIDE



Why do businesses “hire” Autobooks to get paid?

Reason #4

“I’m overwhelmed! Make invoicing and accepting payments simpler.”



- » Managing all aspects of the business is too chaotic for business owners.
- » Business owners need better ways to track payments.
- » Autobooks can increase business efficiency.
- » Business owners can stop spinning their wheels looking for solutions

READ SLIDE AS-IS

GO TO NEXT SLIDE

Autobooks **adds value**
for your customer, how
does it **add value for**
you?

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Let's talk about how Autobooks can also add significant value to your financial institution.

GO TO NEXT SLIDE.

Autobooks brings value to your institution.

These value factors help to strengthen relationships with your small business customers.



Now, let's talk about the value that Autobooks tools can bring to your financial institution!

*ANIMATIONS ON THIS SLIDE

There are several ways that Autobooks adds value to your financial institution, that's what makes it so great. (CLICK FOR ANIMATION)

- 1) You now have the tools available for your small business owner customers, those that own side-gig businesses, or and those that are just getting started and may not fit in with other traditional merchant service solutions (CLICK FOR ANIMATION)
- 2) Your financial institution now has a leg up on competition to those third-party / non-bank providers that offer payment processing solutions. You can provide them the same features as other options, at an affordable rate, all while being integrated into their current online banking platform (CLICK FOR ANIMATION)

- 3) Over time, you become that customer's trusted advisor for all their business needs
- Customer relationships are started, developed, and maintained over time
 - Customer turnover rates will decrease as customers are less likely to search for other options (CLICK FOR ANIMATION)
- 4) Right away, you'll be building a stronger relationship with that customer and increasing activity in key areas:
- Deposit activity will grow since the customer is using their bank account to take in all their business earnings;
 - Non-interest income will go up as we earn revenue with each payment received by their business;
 - Cross-sell opportunities also go up! Once the customer signs up for a product, they're open to more!

GO TO NEXT SLIDE.

The slide features a dark blue background with decorative wavy line patterns in a lighter blue shade on the left and right sides. The text "Autobooks Enrollment" is centered in the middle of the slide.

Autobooks **Enrollment**

Now that we've discussed how the solution benefits the customer and you, let's dive into details on how it works!

GO TO NEXT SLIDE.

Within Online Banking

INSERT IMAGE OF YOUR ONLINE BANKING
PLATFORM. INDICATE WHERE AUTOBOOKS IS
LOCATED.

LEADER NOTE: INSERT IMAGES FROM YOUR ONLINE BANKING PLATFORM AND
INDICATE WHERE AUTOBOOKS IS LOCATED

Setup: Begin Autobooks Enrollment

Log Into Online Banking

- Customer will use **existing credentials** to log into online banking.
- Once logged in, choose the Autobooks **feature** of choice.

Explore Autobooks

- Autobooks information boxes will appear on screen. Customers can **read through or exit out** and explore Autobooks tools before continuing
- If a customer chooses to exit out, when ready to continue, choose an Autobooks Feature



Terms & Conditions

- Autobooks **Terms and Conditions** will appear. The customer will read and accept before continuing.

Answer Basic Questions

- The customer will answer **basic questions** about the business, then wait for notification of payment approval from Autobooks

Before we begin, here are some notes on enrollment:

- 1) Customers complete enrollment within 15 minutes.
- 2) The customer enrolls once to unlock all of the payment tool features within Autobooks;
- 3) Enrollment is available 24/7.

Leader Notes:

Click to reveal each enrollment step and read the instruction.

GO TO NEXT SLIDE

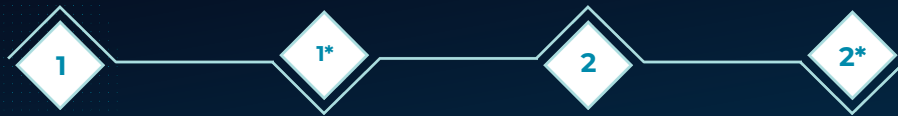
Setup: Payment Approval Process

Assess

- Autobooks will run the business data and information through an **automated assessment**

Approved

- Customer will receive an email notification that they have been **payment approved** and can start using Autobooks tools to get paid!



*Review

- If the assessment requires a manual review**, Autobooks will contact the customer and/or financial institution for more information

*Denial

- If denied**, Autobooks will email the decision to the customer along with instructions to call Autobooks for details

Once the customer completes enrollment, Autobooks will run an automated risk assessment on the business and business owner information. The majority of customers are approved to process digital payments within minutes of enrollment!

Leader Notes:

Click to reveal each enrollment step and read the instruction.

Note: if a manual review is required, the customer can check the status of their approval simply by logging into online banking and opening Autobooks.

GO TO NEXT SLIDE

Autobooks Pricing:

A pricing model made **simple and easy** to understand

No Hidden Fees | **No** Contracts | **No** Additional Use Charges | **No** Required Use Agreements

- Enrollment Options -

Payment Processing Only

- Send An Invoice
- Payment Link
- Checkout Pages
- Tap to Pay

NO Monthly Subscription

Full Autobooks

- Payment Processing
- Accounting
- Reporting

\$9.99 / mo.

- Processing Fees -

Card Not-Present Payments

- Invoices
- Payment Link
- Checkout Pages

**3.49 %
per transaction**

Card Present Payments

- Tap to Pay

**2.75 %
per transaction**

**ACH
(Bank Transfer)**

- Invoices
- Payment Link

**1.00 %
per transaction**

*ANIMATIONS ON THIS SLIDE

LEADER NOTE: If your financial institution does NOT offer Tap to Pay, remove references from Payment Processing Only box and remove Card Present Payments box from this slide.

Now let's talk about pricing! (CLICK FOR ANIMATION)

- The customer pays no monthly subscription fee to use the basic tools of Send an Invoice, Payment Link, Checkout Pages, or Tap to Pay (CLICK FOR ANIMATION)
- If the customer upgrades to add accounting and reporting features, they'll pay a monthly subscription fee of \$9.99 (that's cheaper than two fancy coffee drinks!)

Regardless of what tool the customer uses, they will pay processing fees to take in payments from their customers. (CLICK FOR ANIMATION)

- If the end customer uses a credit or debit card to pay the business, the business owner will incur a processing rate of 3.49% of the amount paid.
For example, if the end customer pays the business \$100 using their credit card,

the business owner will be charged a processing fee of \$3.49. This fee is debited from their checking account.

- For Tap to Pay transactions where the payment method is physically present, the processing rate is 2.75%.
- If the end customer pays with a bank transfer, the business owner will incur a processing rate of 1.00% of the amount paid. So that same \$100 payment will come with a processing fee of \$1.00.

The business owner can choose to pass these fees on to the end customer by itemizing their invoice or adjusting the total amount due. NOTE: the business owner will want to check if their state or local authority allows them to pass along processing fees. Whether or not its allowable can vary by state or region!

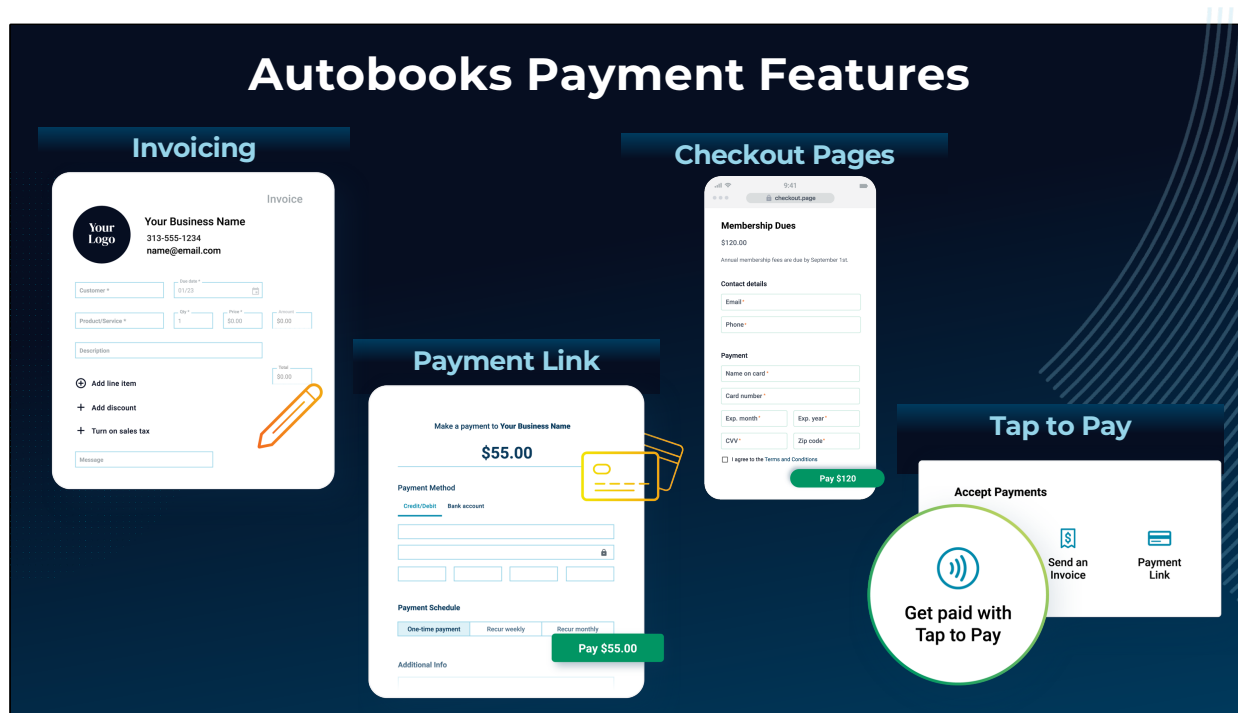
GO TO NEXT SLIDE.

The slide has a dark blue background with a pattern of light blue, curved, concentric lines on the left and right sides, creating a sense of depth and movement. The text is centered in the middle of the slide.

Autobooks **Feature** Overview

Now let's dive into details on how our features work!

GO TO NEXT SLIDE.



Autobooks offers four different ways to get paid. In the next few slides, we'll examine the key features of each payment tool:

- 1) Invoicing
- 2) Payment Link
- 3) Checkout Pages
- 4) Tap to Pay

GO TO NEXT SLIDE

Invoicing

- Build, email, and track **single and/or repeating invoices**
- Create, email, and track **estimates**
- Track **all invoice payment statuses**
- Customize **invoice template**
- Enable **automatic payment reminders and late fees**

To Learn more about our Invoicing tools, and how they work, [click here](#).

The screenshot displays the 'Invoices' section of a software interface. At the top, there are tabs for 'Invoices', 'Invoice Schedules', 'Estimates', 'Customers', 'Payments', 'Products/Services', and 'Invoice Settings'. Below the tabs, there are buttons for 'New Invoice' and 'New recurring invoice'. A search criteria dropdown and an 'Export' button are also present. The main area shows a table of invoices with columns for Name, Status, Invoice #, Due Date, Total, and Balance due. The table lists several invoices with statuses like 'Due', 'Past due', and 'Draft'. A modal window titled 'Create an invoice' is open, showing fields for 'Your Business' (with a logo and contact info), 'Customer *', 'Due date' (03/27/2024), 'Product/Service *', 'Qty' (1), 'Price' (\$0.00), 'Amount' (\$0.00), 'Description', 'Tax' (\$0.00), and a 'Message' field. There are also buttons for 'Add tax item', 'Add discount', 'Turn on sales tax', 'Send invoice', 'Previous invoice', and 'Save as draft'.

| Name | Status | Invoice # | Due Date | Total | Balance due |
|-----------------|----------|-----------|------------|----------|-------------|
| Brooks Green | Due | 9670569 | 03/31/2024 | \$190.00 | \$190.00 |
| Chandler Bing | Due | 9681084 | 03/28/2024 | \$100.00 | \$100.00 |
| Chandler Bing | Past due | 9675422 | 03/21/2024 | \$100.00 | \$100.00 |
| Chandler Bing | Past due | 9669425 | 03/14/2024 | \$100.00 | \$100.00 |
| Amanda Marquez | Draft | -- | 03/13/2024 | | |
| Chandler Bing | Past due | 9660860 | 03/07/2024 | | |
| Rachel Green | Past due | 9660692 | 03/04/2024 | | |
| Chandler Bing | Past due | 9652233 | 02/29/2024 | | |
| Chandler Bing | Past due | 9647448 | 02/22/2024 | | |
| Ashley Difonzo | Past due | 9640450 | 02/16/2024 | | |
| Colin Walbridge | Paid | 9594254 | 02/14/2024 | | |
| Brooks Green | Draft | -- | 02/05/2024 | | |

The first tool is Invoicing. This tool is great for customers to send digital invoices via email to their customers and get paid back via credit card or debit card or bank transfer.

The invoice tool does more than create invoices! The customer can also:

- 1) Send single or repeating invoices. The customer can see all invoices sent out over time, and each invoice status is color coded to easily identify which need follow up for payment.
- 2) Create and manage digital estimates (this feature is great for contractors or other businesses that need to give estimates to potential customers)
- 3) Track and manage all payments taken through digital invoices
- 4) The customer can customize their invoice template by adding their business logo and change color schemes to match their brand. They can also set up automated payment reminder emails and automated late fees to prompt their customers to pay.

To learn more about how Invoicing works, click the slide link to take a short micro-learning.

GO TO NEXT SLIDE.

Send an itemized digital invoice to a customer

The screenshot shows a digital invoice form for 'HomeService'. At the top, it displays the company name 'HomeService', phone number '313-555-1234', and email 'jen@homeservice.com'. Below this is a 'Customer' field, a 'Due date' field set to '09/23', and a 'Make recurring' toggle. The main body of the form is a table with columns for 'Product/Service', 'Qty', 'Price', and 'Amount'. One item is listed with a quantity of '1', a price of '\$0.00', and an amount of '\$0.00'. Below the table is a 'Description' field and an 'Add item' button. At the bottom, there is a 'Message' field, a 'Total' of '\$0.00', and a 'Thank you!' note with the text 'Include a personal message with each invoice!'.

- Roofers, plumbers, handymen
- Professional and legal services
- Storage facilities
- HOAs
- and more...

Some business types that are a good fit for invoicing include:

- Contractors like roofers, plumbers and handymen can use both the Estimate and Invoicing features
- Consultants or legal services that bill by the hour can easily generate an invoice to their client
- Small homeowners associations can use the repeating invoice feature to bill folks for monthly association dues

GO TO NEXT SLIDE

Payment Link/QR Code

- **Accept a payment** directly inside of online banking
- **Share payment link**
 - Email
 - Text messages
 - QR Code
 - Embed link into websites or social media pages
- Track and manage **payments**
- **Customize** the payment form

To Learn more about our Payment Link and QR Code, and how they work, [click here.](#)

The second tool is called Payment Link (this appears in online banking under a button labeled Accept a Payment). This tool gives the business owner options to collect digital payments in instances where a digital invoice isn't appropriate. Here's what the customer can do with the tool:

- 1) Accept a payment directly inside of online banking. By clicking the 'Accept a Payment' button in the tool, the business owner can complete a form with their customer's details and process that payment on behalf of the customer. This is great for taking payments over the phone, for example.
- 2) Share a link to a payment form. Each customer that enrolls is assigned a unique payment form link. This link can be copied out of online banking and shared with their customers anywhere they interact with them. The link can be emailed, texted, embedded into social media, or converted to a QR code for scanning. The business can post the link onto their business website for customers to access too.
- 3) Track and manage all payment form payments received.
- 4) Customize their payment form by adding a business logo and contact information.

The business can email the payment form link directly from the tool itself. Their

paying customers can make a one-time payment using the form OR set up a recurring payment to go to the business (or non-profit).

Non-profits love the payment form link to collect online donations quickly and easily!

GO TO NEXT SLIDE.

Text a secure payment link

- Construction Trades
- Non-Profits
- Personal services
- and more...

Everything turned out great!

Can I pay with credit card?

Thanks for hiring us! Yes, you can pay by credit card by going to this link:

autobooks.co/pay/modelgarage

Awesome, just paid. That was really easy!

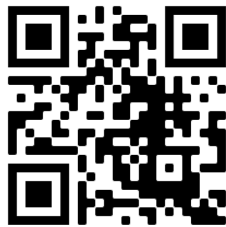
22

Who uses the Payment Link to get paid? We've seen:

- Businesses that use paper invoices make their link available to paying customers to give them digital payment options
- Non-profits use the link (and the provided QR code) to collect digital donations. Donors can set up recurring donations, and donors have an option to cover the processing fee for the non-profit as part of their donation.
- GO TO NEXT SLIDE

Get paid through

a QR code



Jenny's Jewelry

- Craft Fair
- Farmers Market
- Nonprofits
- Events and fundraisers
- and more...

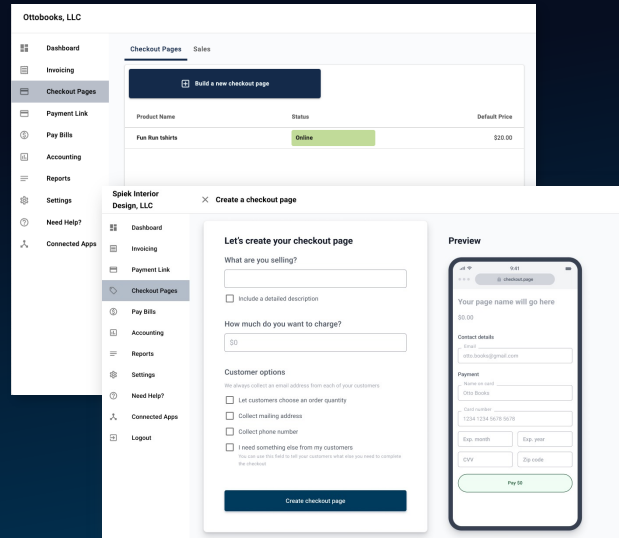
23

Autobooks also provides a QR code for the payment link. Businesses can download the code to their computer or smartphone and display it. Some ways we've seen this used include:

- Folks that have a table at a craft fair or farmers market can display their code for customers to scan and pay
- Non-profits can display their code during events and fundraisers to gather donations or display their code on printed materials
- GO TO NEXT SLIDE

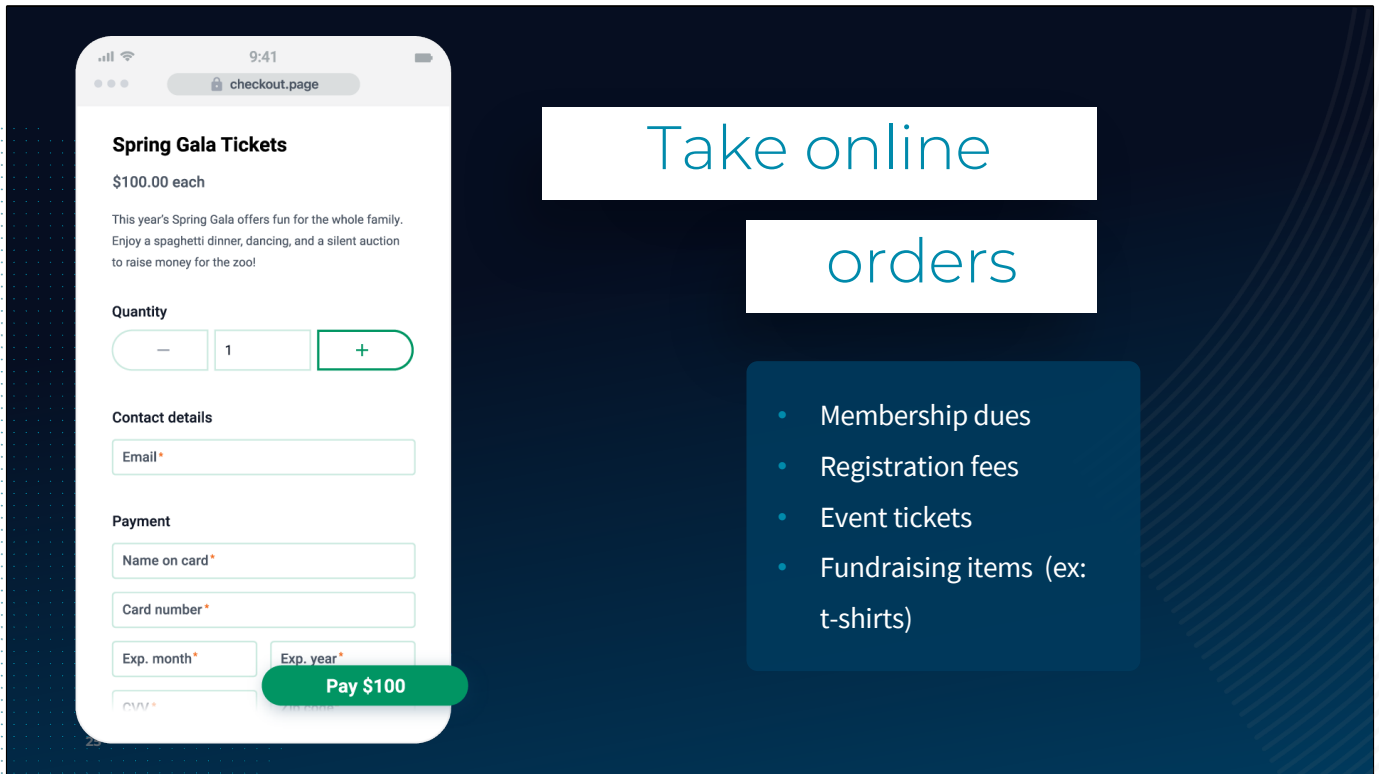
Checkout Pages

- **Build detailed payment pages** for single initiatives or goods
- Each page has a unique web link – making it **easy to share**
- **Track all payments** made through checkout pages



The third tool is called Checkout Pages. This tool gives the business the ability to sell a service, an item, or collect fees through a checkout link. The link can be posted on the business or organization website, or sent to payors via email or social media. Here's what folks can do with Checkout Pages:

- Create pages for collecting registration fees, membership dues, or association fees
- Create individual pages to sell t-shirts, hats, buttons or other fundraising materials
- Create pages that sell package deals
- GO TO NEXT SLIDE



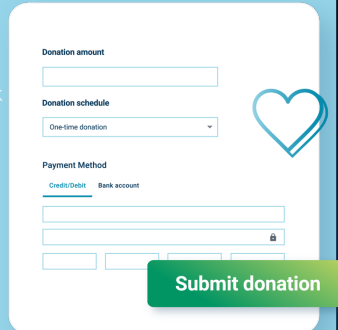
What ways do businesses use checkout pages?

- Sell tickets for events online
- Collect registration fees for classes or fitness events (like marathons)
- Sell t-shirts, hats or buttons for fundraising
- Collect association dues or membership fees
- GO TO NEXT SLIDE

Payment Link vs Checkout Pages

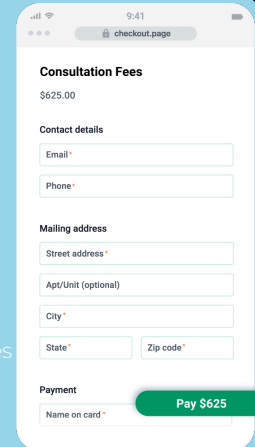
Payment Link:

- Share a secure link to collect general payments
- Display a QR code or print code on materials

A screenshot of a web form for a payment link. It includes a 'Donation amount' input field, a 'Donation schedule' dropdown menu with 'One-time donation' selected, and a 'Payment Method' section with 'Credit/Debit' and 'Bank account' options. A green 'Submit donation' button is at the bottom right. A blue heart icon is to the right of the form.

Checkout Pages:

- Sell single items, quantity purchases, or package offerings
- Collect standard deposits or reservation fees
- Collect membership/HOA dues

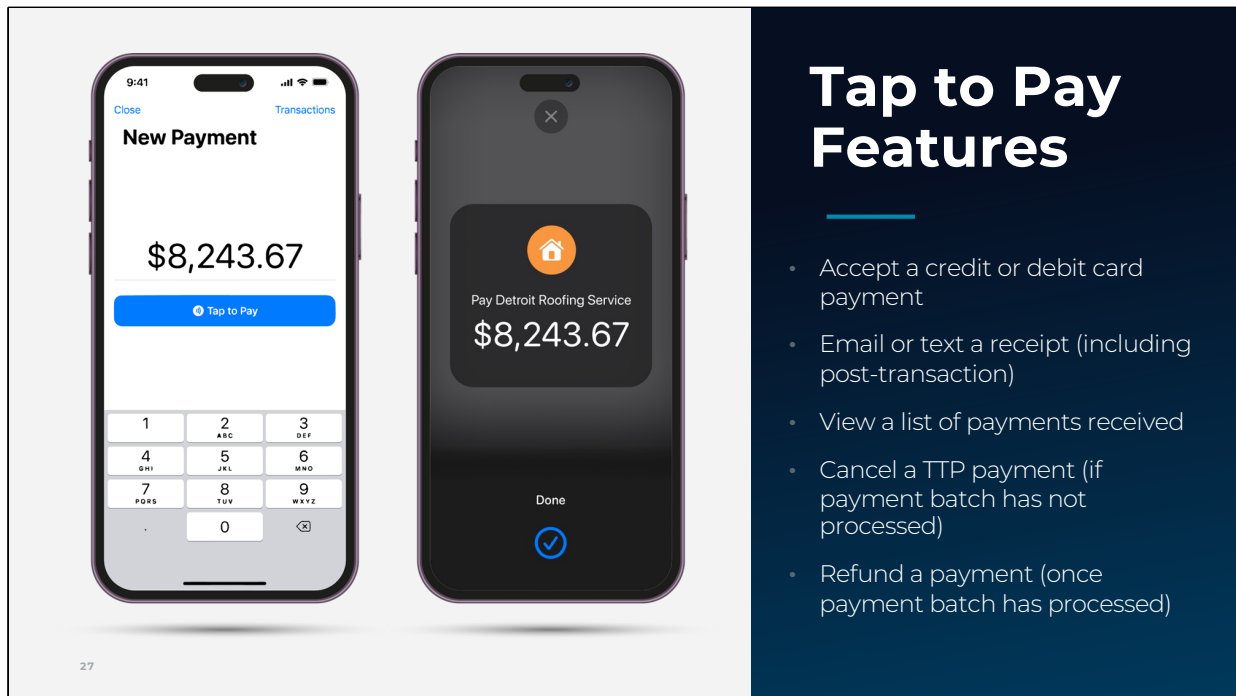
A screenshot of a mobile checkout page. It shows a 'Consultation Fees' section with a total of '\$625.00'. Below this are sections for 'Contact details' (Email, Phone), 'Mailing address' (Street address, Apt/Unit, City, State, Zip code), and 'Payment' (Name on card). A green 'Pay \$625' button is at the bottom right.

The Payment Link and Checkout Pages are similar, but not the same:

A Checkout Page is best for selling single items. A business will create multiple checkout pages for each item or event or fee they collect.

The Payment Link is great for collecting donations or as an alternative to cash or check payments. The Payment Form is not pre-filled, so the payor types in their payment amount and details manually.

GO TO NEXT SLIDE



LEADER NOTE: If your financial institution does not offer Tap to Pay, please hide or delete this slide.

The Tap to Pay functionality offers a lot of features for business owners. This feature is great for customers to be able to take payments from their customers, in person, with chip enabled payment options or digital wallets.

With the Tap to Pay Feature, the business owner can:

- Accept credit or debit card payments from contactless enabled payments and digital wallets
- Send a receipt for all Tap to Pay transactions, including post-transaction receipts
- View a list of all payments / transactions received
- Cancel Tap to Pay payments if a payment has not processed
- Refund full payments once a payment batch has processed completely

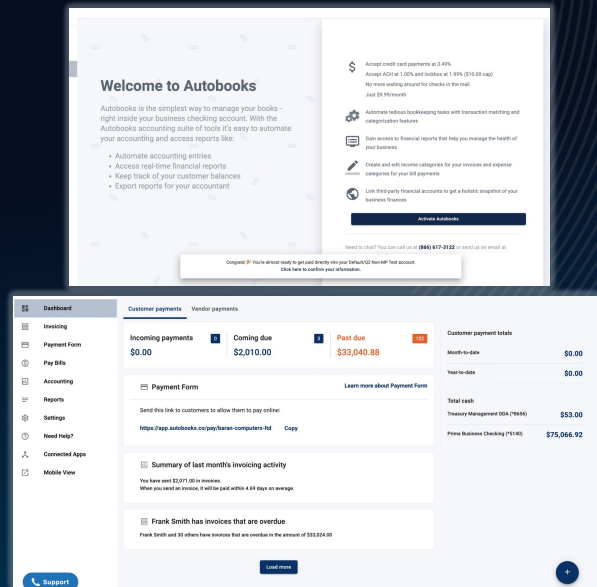
GO TO NEXT SLIDE.

Self-Service Upgrade to Accounting

This upgrade includes Accounting and Reporting functionality with these features:

- **Automatic** transaction categorization
- **Additional Financial Reporting** options
- **Journal entries**
- **Budgeting tool**
- QuickBooks **import** options

To Learn more about our Accounting Features [click here](#).



The small business owner has the option to upgrade their experience to include basic bookkeeping and reporting features! The customer can upgrade themselves, from within any payment tool. These upgraded features include:

(READ BULLET POINTS)

These features are a great fit for a side business or a small business that needs to track expenses (and can't afford a full-time accountant).

GO TO NEXT SLIDE.

How do we identify customers that **need Autobooks?**

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There is an obvious need for digital payment processing tools.

So how do we identify customers that will benefit from Autobooks?

Let's look at both passive and direct ways to identify customers.

GO TO NEXT SLIDE.

Identifying the right customers

These **key indicators** can help decide if Autobooks will best help the customers with their business



Account Opportunities

- » Check for regular deposits from third-parties
- » Look for micro-transactions
- » Business account owners



Needed Services and Types of Business

- » Needing invoicing and payment acceptance
- » Payment Flexibility
- » Small business owners, non-profits, property management owners

You can identify opportunities, passively, by looking at account transactions. And your customers don't even have to be physically present to see these opportunities. There are several hundred customers within a typical bank that use third party payment apps to get paid, which makes a perfect opportunity to make them aware of our new solution!

Does your customer receive regular deposits from Square, Venmo, PayPal, Stripe, etc? This new solution offers the same features as these payment apps, but with the added benefit of being a part of their bank account.

No juggling multiple applications and multiple login credentials to different apps and websites.

Payments go right to the customer's bank account instead of being held in a third-party virtual wallet.

No more manually matching deposits to outstanding invoices

Another way that you can identify customers is to think about the services they would benefit from.

Again, this does not have to be done "in-person" but it can serve as a middle ground

between in-person conversations and passively thinking of customer opportunities.
If your customer needs (CLICK FOR ANIMATION, READ BULLETS AS THEY APPEAR).

If your customer has a business that needs these services, it's great to be proactive in conversations with them and moving them towards enrollment.

GO TO NEXT SLIDE

Driving the conversation

Questions you can ask your customers to help define their need for Autobooks



How do you get paid by your customers?

- Discover your customers current payment process.
 - Cash, checks, payment app, or a combination of things.
- Discover your customers need for digital services and payment processing.
 - Find out if customers need digital services or are currently using one.



How do you know that you were paid?

- Discover how your customers track payments and expenses.
 - Are they missing payments or is the admin work time-consuming
- Discover how your customer accesses their funds after payments.
 - How customers access funds after payments
 - Is their business profit tied up in a virtual wallet with third-party
 - How long does it take for money to get to their bank account

Once you've identified opportunities, how do you start the conversation? You can do that with these questions: (CLICK FOR ANIMATION) -

How do you get paid by your customers?

Discover your customer's current process to get paid. Is it cash? Checks? A payment app? Or a combo of things?

Discover if the customer needs a digital service or if they are currently using one. Do they need a digital service or want to fire their current service? (CLICK FOR ANIMATION) -

How do you KNOW you were paid?

Discover HOW the customer tracks payments and expenses. Are they missing payments? Is admin work time-consuming?

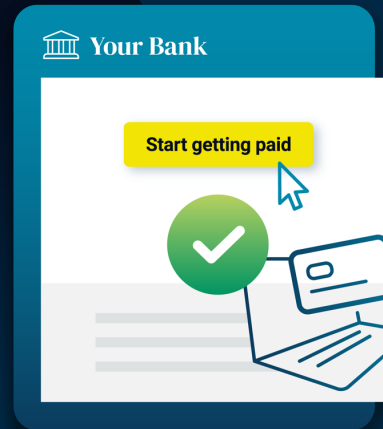
Discover how the customer accesses their funds after payment. Is their business profit tied up in a virtual wallet with a third party? Does it take too long for money to hit their bank account and be useable for business purchases?

GO TO NEXT SLIDE

Payment Recommendation Quiz

This tool is designed to help you identify the Autobooks payment processing solution that best suits your customers.

By answering a few simple questions about your customer and their business, you'll discover which tools are available, the ones that are most suitable, and the unique features each tool offers.



LEADER NOTE: Make the link to the payment recommendation quiz available to your staff for their customer conversations.

Finally, if you're still not certain which payment tool to recommend, take our Payment Recommendation Quiz! Answer a few simple questions about the business (or take the quiz with your customer!) and we'll recommend the payment tools that best fit their needs.

GO TO NEXT SLIDE.

The slide features a dark blue background with decorative wavy lines in a lighter blue shade on the left and right sides. The text 'Autobooks' is in a white serif font, and 'Resources' is in a bold white sans-serif font.

Autobooks **Resources**

Now that we've reviewed WHY these tools are valuable, who they are for, and what they do...lets review the types of customer support that the Autobooks team provides to your customers that use them.

GO TO NEXT SLIDE.

Customer Email Communication provided by Autobooks



Your customers are important to you, and they are to us! Autobooks provides outstanding support to make sure your customers' Autobooks experience is great.

Welcome Email

- Enrolled customers receive an introduction email to Autobooks Support, our contact information, and processing rates.

Important Notifications & Educational Communication:

- Autobooks will send a few educational emails regarding our technology to ensure all enrollees have information at their fingertips.

*ANIMATIONS ON THIS SLIDE

The Autobooks team is here to support our customers in using the tools! Once a customer enrolls, a few things happen to welcome the customer:

- 1) The customer will receive a welcome email. This email details the Autobooks Support phone number (yes, they can talk to an actual person for help!) and their email address. (CLICK FOR ANIMATION)
- 2) Autobooks will send out a few educational emails to the customer about the features within the tools along with links to more information.

GO TO NEXT SLIDE.

Customer Support Channels

Autobooks Knowledge base:
help.autobooks.co

You can find:

- Support articles
- How-to articles
- Submit a ticket

Phone Support:

- 866-617-3122
- Monday – Friday
- 9am-6pm EST

How can we help you?

Search for answers



Getting Started

New to Autobooks? These topics will help get you on the path to success.



How To videos

Check out our easy to follow, how-to video library for our most popular features.



Grow your business with Autobooks

Looking for creative product? Check out our articles for ideas.



Invoicing

Send a professional online invoice or estimate right from online



Payment Link/Accept a Payment

Learn how to accept a payment



Payment Problems

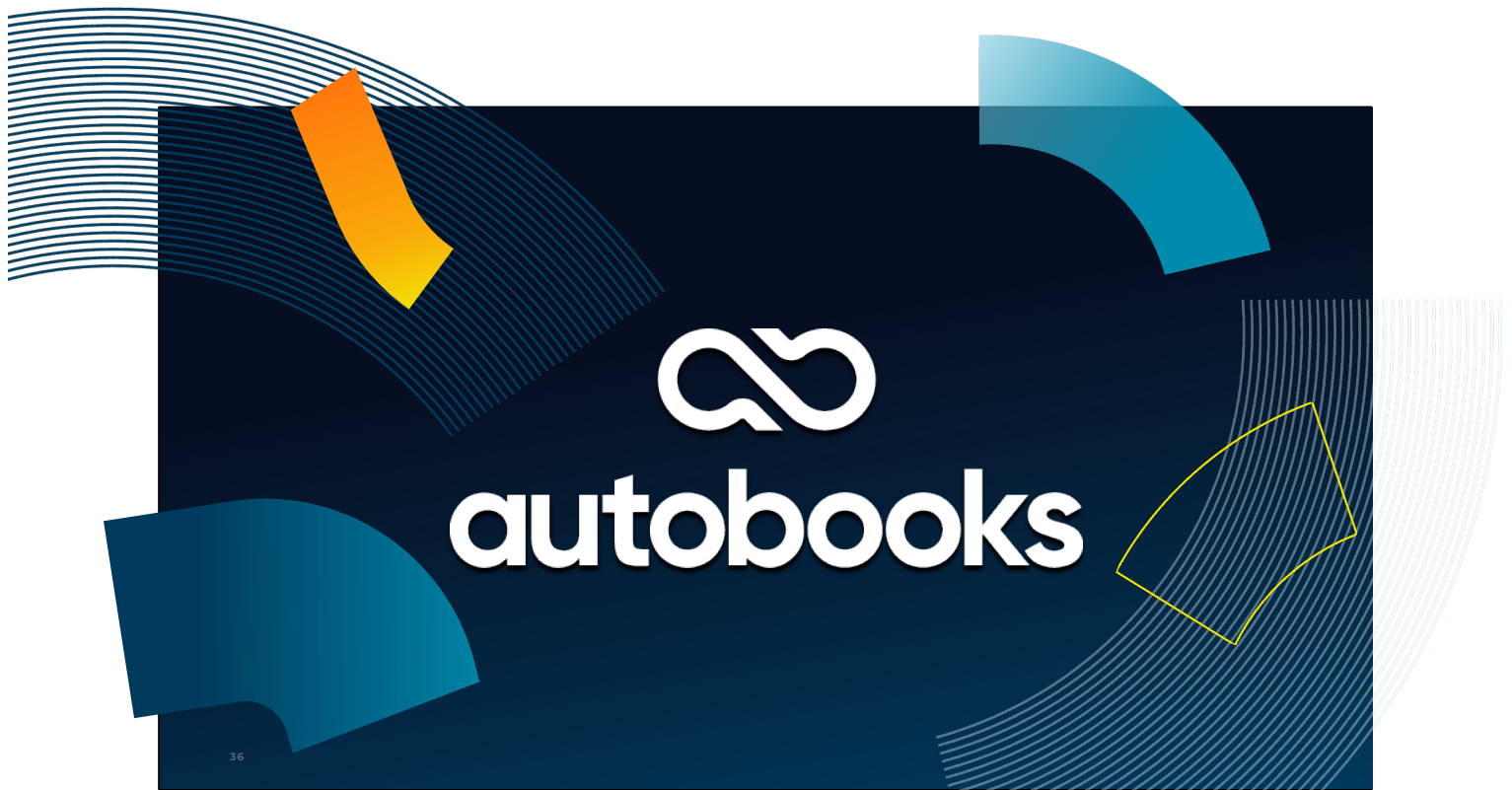
Explore frequently asked questions about how payments are processed

***AUTOMATIC ANIMATIONS ON THIS SLIDE**

There are a number of additional support resources available as well including:

- Application Knowledge base built right into the Autobooks tools. This knowledge base houses many support articles with how-to's, walkthroughs, screenshots, guides and more.
- In addition to the articles, customers and small business owners can submit a web ticket directly through the knowledge base to our support team.
- Also, the Autobooks Support team is available by phone Monday thru Friday, 9am – 6pm ET.

GO TO NEXT SLIDE.



Thank you for attending Autobooks Training!

LEADER NOTE: Open the floor for additional questions. Have a manager or team leader provide their thoughts on this product/coach the team on how to position Autobooks with their customers.