

# Autobooks Training Guide

The purpose of this document is to be a companion guide for Autobooks Training. Print this document prior to attending our training, or after, and keep for your own records.

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Small business owners are looking for hands-free ways to get paid to meet an increased demand for digital payment processing.

- | 73% of small businesses say that new forms of digital payments are fundamental to their growth
  - | 59% of small businesses plan to shift to using only digital payments within the next two years, or are already cashless
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How to identify customers that could benefit from Autobooks digital payment solutions:

1. Check Customer Account Opportunities
  - | Regular deposits from third-party processors
  - | Regular cash and/or check deposit
2. Assess what services would benefit the business
  - | Could they benefit from single or recurring invoices?
  - | Do they need to provide estimates to potential customers?
  - | Do they run a non-profit or side business?
  - | Do they need a better way to track payments and expenses?
3. Listen for certain customer business challenges
  - | Current systems are too complex
  - | Negative experiences with third-party payment processors
  - | New business owners looking for payment processing solution

Drive conversation with business owners by asking:

1. How do you get paid by your customers?
    - | Discover their current payment collection process (cash/check? Third-party processor?)
    - | If using a third-party processor, are they happy with it? (Customer service, how quickly they access money, etc.)
  2. How do you know you were paid?
    - | Discover how they track received payments and business expenses
    - | Discover how they access funds after payments are made (virtual wallet? Debit card from third-party provider?)
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Enrollment in Autobooks is easy, and usually takes about five minutes or less! There are only a few steps for a customer to follow.

1. Log into online banking using normal login credentials
2. Click on the feature of choice ( Send an Invoice or Accept a Payment )
3. Answer a few basic questions regarding the business
4. Once completed, the customer's information is sent to the Autobooks team for a risk assessment on the business and business owner. The customer will be notified once they can start collecting digital payments.

Some notes on enrollment:

- | Once enrolled, the customer has access to both the Send an Invoice and Accept a Payment tool
  - | Customers can sign up in online banking 24/7 or in the branch if they can access online banking.
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## Autobooks Features.

With all the tools available through Autobooks, here are some of our most popular features:

### Send An Invoice -

- | Send single or recurring invoices
- | Create and manage estimates
- | Add and manage customers
- | Track and manage all payments taken through digital invoices
- | Add and manage products and services to track current pricing
- | Customize invoice templates with business logo and branding
- | Automated payment reminder emails and automated late fee setup available

### Accept A Payment -

- | Accept payments directly inside of online banking
- | Share a unique payment form link via email, text message, QR Code for scanning, embedded into social media pages, or into business websites
- | Track and manage all payment form payments received
- | Customize the payment form with a business logo and contact information

## Self-Service Upgrade option Available -

This upgraded service is optional and available to customers from within either of the payment processing tools. The features for this upgrade include:

- | Automatic transaction categorization
  - | Financial reporting
  - | Advanced journal entry tool
  - | Budgeting tools
  - | Link third-party accounts to track expenses holistically
  - | QuickBooks import options
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How Autobooks supports your customers:

Once a customer enrolls:

- | They will receive a welcome email which details the Autobooks Support phone number and email address so they can get support when they need it
  - | They will also receive a few educational emails regarding Autobooks technology to ensure all enrollees have the most updated information
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Resources available:

Available Monday - Friday 9am - 6pm ET

- | Phone Support: 866-617-3122
  - | Email Support: [support@autobooks.co](mailto:support@autobooks.co)
  - | In-Application Knowledge Base: <https://help.autobooks.co>
  - | Additional resources for you, our Financial Institution partner: <https://banking-help.autobooks.co>
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