

Common Questions

Below are a few questions you and your team may be asked about Autobooks. As always, if you face any questions that you'd like help answering, don't hesitate to forward them over to the Autobooks team at [FISupport@Autobooks.co](mailto: FISupport@Autobooks.co), or at 866-617-3122.

Q: What is Autobooks?

A: Autobooks is a tool for business customers that allows you to send invoices, accept payments, and keep track of customers from inside online banking.

Q: What are the benefits of using Autobooks?

A: With Autobooks you can:

- Create professional digital invoices
- Accept payment by credit/debit card or bank transfer
- Keep track of payments made or outstanding
- Generate reports like balance sheets, sales tax, and more

Q: Who is Autobooks for?

A: Business owners must have a checking account and access to online banking to enroll in Autobooks. The following business types are a great fit:

- Any business that bills/invoices for products/services
- Service-based businesses
- Non-Profits seeking to collect online donations

Q: Can I get help to start?

A: The Autobooks Team is here to help!

Reach out to us:

- By Phone 866-617-3122
- Open a Ticket: <https://help.autobooks.co/contact-autobooks-support>
- Search our knowledge base: <https://help.autobooks.co>

Q: How do I sign up to try it?

A: You can self-enroll right inside of online banking! Just log in and click on Autobooks payment tools to start. If you need help, reach out to us at 866-617-3122.

Q: Do I have to download any software to use Autobooks?

A: No. Autobooks lives completely inside of online banking, and no additional software is required.

Q: I already have QuickBooks. Why should I switch?

A: Autobooks is an extremely affordable accounting solution with features that are the right size for a small business. Complete accounting tasks right in online banking, without having to upload or download your banking data to another app.

Q: Is Autobooks working with my financial institution? Is this safe?

A: Yes! Autobooks has partnered with your financial institution to bring you the best invoicing, payment, and accounting platform available on the market. Autobooks exceeds industry standards to protect customer information.

Q: How is Autobooks different from QuickBooks?

A: Autobooks is built directly into online banking, so you don't need multiple logins. Additionally, Autobooks is designed with small business owners in mind (not accountants) so it's streamlined to focus on receivables, payables, and cash flow.

Q: Can Autobooks replace QuickBooks?

A: For most small businesses, it can. Autobooks is a simple way to keep your business accounting organized right within online banking. You can even import your QuickBooks data right into Autobooks so you can see the difference for yourself. Some businesses do choose to add Autobooks on top of their existing systems to utilize our payment tools.

Q: Where can I learn more?

A: Visit the Autobooks page on your financial institution website, or visit <https://aubooks.co> for more details.

You can also talk with an Autobooks Specialist by calling us at 866-617-3122. We're here Monday through Friday, from 9am - 6pm ET.