



Educational Emails for your staff



The Importance of Ongoing Training

The success of customers adopting our technology comes from the knowledge and talent within your sales teams. Once our payment tools are launched and employees are trained, it is important for ongoing training to take place in an easy, eye-catching format to keep the tools at top of mind.

Autobooks provides you email copy to do just that. We recommend you highlight our product on a regular cadence (weekly, biweekly, or monthly) to extend your initial training.

Use these messages in a company newsletter, in a product spotlight, or as talking points in your next team meeting.

Just highlight the text in this document to copy it, then paste it into the communication format that works best for your organization. We've provided a total of 10 topics for you to choose from, click any topic below to jump to that email:

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Feature Spotlights:

1) Send a Recurring Invoice

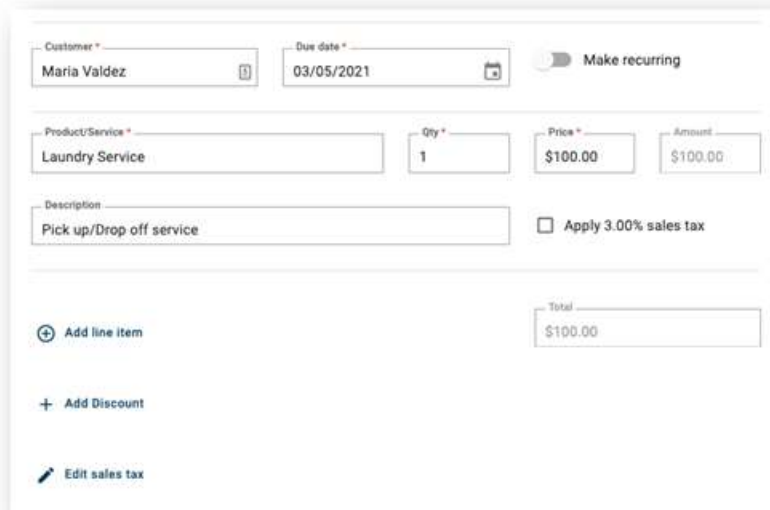
Small businesses can send recurring invoices using the new invoicing tool! This is fantastic for those businesses that bill a customer on a regular basis like weekly or monthly (or even bi-weekly, which sounds like it's twice a week but really it's twice a month?!?).

Why is this Cool?

Businesses can save time(!) by setting up an invoice once...all subsequent invoices go to the customer *automagically*.

How Does It Work?

The business clicks the Make Recurring toggle when completing their invoice template. They can set the frequency of the invoice (that pesky bi-weekly thing again) and the number of times the invoice needs to be sent (or pop in an end date). That's it!



The screenshot displays a web-based invoice creation form. At the top, there are fields for 'Customer *' (filled with 'Maria Valdez') and 'Due date *' (filled with '03/05/2021'). A toggle switch labeled 'Make recurring' is turned on. Below this, there are fields for 'Product/Service *' (filled with 'Laundry Service'), 'Qty *' (filled with '1'), 'Price *' (filled with '\$100.00'), and 'Amount' (filled with '\$100.00'). A 'Description' field contains 'Pick up/Drop off service'. A checkbox for 'Apply 3.00% sales tax' is unchecked. At the bottom right, a 'Total' field shows '\$100.00'. On the left side, there are three buttons: '+ Add line item', '+ Add Discount', and 'Edit sales tax'.

Who Should I Tell About This?

Business owners that bill customers on a recurring basis! This feature can be used by Lawn Service companies, Landlords, or Home Cleaning services (just to name a few).

2) Payment Form

Every small business or non-profit that enrolls to use payment acceptance tools receives a custom payment link. How is it custom? The name of the business or organization is right in the URL! Clicking this link presents their custom Payment Form on a secure web page.

Why is this Cool?

Businesses can share their payment link wherever they interact with their customers...pasted into an email, a text message, a social media post, or embedded on their website (you know, those buttons you've clicked on a business site that say "Pay Now" or "Donate Here").

How Does It Work?

The business copies their payment link right from Autobooks and pastes it where it's needed. Places like:



Or like:



Who Should I Tell About This?

Business that collect payments from customers but don't use invoicing to do it OR use paper invoicing at the time of service. Businesses like: Fitness Centers, Day Care facilities, non-profit organizations, or any type of home contractor.

3) Payment Form vs Invoicing


Autobooks offers two tools for small businesses to get paid: Invoices and Payment Form.


Send an Invoice:


An invoice lets a business owner send a professional bill via email with a link to pay electronically.

It includes space to describe the products or services their customers have purchased, add discounts or additional line items.

Sending a digital invoice is great when:

 The business is currently sending paper invoices, but they're tired of the admin work involved with writing up an invoice in Word, printing it out, finding a stamp, and driving to the post office to send it.

 They're tired of waiting for customers to pay (attention to) paper invoices, which take days to get to the customer via snail mail and then sit on their desk for another few days (or weeks) before anyone bothers to open their checkbook, find a stamp and envelope, and put the money back in the mail.


 The business owner knows they need to keep precise, accurate records of who they've billed, whether the invoice has been viewed, when their customer has paid, and when that money hits their bank account - but they know that keeping track of everything manually in Excel isn't enough and they have bigger fish to fry than learning QuickBooks.


Payment Form:


The Payment Form is a link the business owner can copy and paste to the places they already communicate with their customers to collect payments electronically.

They can text their Payment Form link to clients, put a donation form on their website, or add the link to an electronic invoice they're already sending from an existing system.

Sending a link to their Payment Form is great when:

 They already have an electronic invoicing process they like where all the bits and pieces work well together, but it's still difficult, cumbersome, or even impossible for their customers to pay by credit card.

 They don't need or want to send invoices, but they DO want to give people a way to pay or donate quickly and easily with their credit card or bank account info.

 They want to add a payment form to their website for clients to pay (with or without an invoice) or they want to give people an easy way to make an electronic donation to their organization.

Which should you choose to discuss? The business can use one method on its own or both together.

Sometimes they might want to use Invoicing, sometimes their Payment Form might be a better fit.

The best way to find out which method works best is to sign up and give both a try.

4) Upgrade to Accounting/Reporting

You know our payment acceptance tools provide convenient and low-cost ways for our small business owners to get paid. But did you know they can upgrade their experience to add simple bookkeeping and reporting tools as well?

To access the upgraded set of tools, the business owner enrolls in our payment acceptance tools first. From there, the business owner clicks on the Accounting/Reporting tab at the top of the tool to see information about our upgraded features.

These features include:

- Expense tracking and transaction categorization
- Budgeting tool
- Journal entry tool
- Link up third-party business accounts to view transaction activity
- Import balances and customer lists from QuickBooks with our import tool
- Robust list of financial reports, including Profit & Loss and Sales Tax reports

These basic tools help your small business stay organized and on-track with their business expenditures, as well as stay within a budget to keep the business profitable. The upgraded version is available for a monthly subscription fee of only \$9.99/month.

Help your small business owners get paid AND stay organized, all within online banking.

Overcoming Objections:

1) Accepting card payments is too expensive

Many small businesses only accept cash or checks for their services, and this is the most popular reason you'll hear as to why they wouldn't want to use our new payment tools. The business owner doesn't want to pay a processing rate per payment when they can collect cash or checks and keep more of the profit for their pocket.

But these business owners aren't considering a few key advantages that electronic payments provide:

- Customers who use credit cards spend upwards of 120% more than their cash-carrying counterparts
- The waiting time for checks to arrive in Snail Mail can be weeks (versus electronic invoices which are paid within five days on average)
- Tracking cash and checks quickly becomes a nightmare once the business falls behind on reconciliation
- Driving to meet their customer, pick up that cash, drive to the bank, make a deposit

How much is their time worth?



2) Digital payments sound complicated

Your small business owners aren't just sitting in an office with their feet on the desk, managing their business. Those small business owners:

- Create the goods they sell
- Market their services to the community (sometimes grass-roots style with flyers door-to-door)
- Meet with potential customers
- Manage employees
- Juggle the mountain of admin tasks that owning a business brings

They don't have time to spend on learning a new software or troubleshooting technology (heck, they don't have time...period). The last thing your small business customer wants is a complex solution with a steep learning curve and a lot of manual tasks.

Our payment tools are different.

The technology is so easy to use, most business owners only need our short tutorial that's baked into the enrollment process. But if the customer needs more, Autobooks has a team on staff that will check in with the business and provide guidance.

3) Don't want to commit to a solution

Long-time business owners have been around the business management block. They've grown distrusting of "new" technology that promises to be easy and low-cost...and are wary of getting "gotcha'd" once they use it.

Let's hear from a real Autobooks customer, Kerry:

"I was using Square and paying 5% transaction fees when a credit card processor promised me 1%, straight up. That was all I was going to get charged. Then they got me into this 4-year contract where it was supposed to be \$79 per month. After the third month, it jumped to \$84 or \$85. Even though they promised me 1%, they didn't tell me that rate was only on a standard credit card that doesn't get points or airline miles. The specialty cards were 6 or 7%. They lied through their teeth."

This type of tale keeps your small business customers on edge about switching to another solution...being locked into a contract or having the Pricing Rug pulled out from under them.

This tool is different.

The customer never signs a contract, they can cancel at any time. And our pricing model is straight-forward and consistent...a simple transaction fee is all they'll pay to collect payments for their business. No monthly fees just to get paid.

Customer Success Stories:

1) Non-Profit Story

Ken has been a part of his church for 30 years, a board member and a deacon. Until recently, the church collected donations by passing the plate for cash donations during services or folks sent in checks for their weekly offerings. But Ken started to identify a difference. They had new, younger members coming to church. Those younger members wanted to donate, but rarely carried cash in their wallets...and didn't even have a check book!

The board members knew they had to take action to make donating easier. They looked at a variety of solutions, some very expensive and some were too complex for their members to use (requiring the donor to create an account, keep track of passwords, etc).

Let's hear from Ken himself: "We did look at some other free programs. There are several church programs out there, specific church programs. And those were similar to Autobooks in what they were charging. However, it was very cumbersome for those people who were going to give through that source to deal with it. You had a set up an account and you had to have a password and there was just a lot of what I consider rigamarole and being an older person in the church, it's like, well, I'm not going to horse around with all of that kind of stuff. You know, I'll just write a check".

Fast forward to the day Ken saw an email about payment tools from his financial institution. It was the perfect opportunity to test the online donation waters, with a trusted source. The price was right, and the form was easy for his members to use!

What does Ken think? "We were very blessed to have started Autobooks when we did. When things started to close up, we had very little income. Some people were continuing to send checks and a few people would come by and give cash to the church directly. But that was it. We lost our source, even though we were continuing our services online. So we got started in Autobooks at the right time, because we had this available and it was advertised on our website. We have it on our Facebook site. People click on it and very easily make their contributions. And so now, even though we've gone back to in-person service, those people are continuing to use that, including myself."

2) Third Party Payment Processor story

Kerry owns a retail business that sells window treatments and blinds. Before he found Autobooks, credit card processors told him he'd pay one rate - but then they charged him another.

Here is Kerry's story:

"I was using Square and paying 5% transaction fees when a credit card processor promised me 1%, straight up. That was all I was going to get charged. Then they got me into this 4-year contract where it was supposed to be \$79 per month. After the third month, it jumped to \$84 or \$85. Even though they promised me 1%, they didn't tell me that rate was only on a standard credit card that doesn't get points or airline miles. The specialty cards were 6 or 7%. They lied through their teeth."

"I decided to try Autobooks after I heard about it through my local bank - and that's the reason I decided to go with Autobooks. Autobooks promised me a low rate and then kept their word. There are no contracts and no

surprise fees for different types of cards. It takes a percent out for each transaction and that's it. It's as good as Square, but half the cost."

"I was one of those business owners who thought about refusing cards. I used to talk people out of using cards and even gave them a few percent off if they didn't use a card. Now if my customers want to pay with a card, I don't worry about it. I'm not angry every time I take a credit card payment."

Do you know a small business owner with a similar tale of bad surprises? Autobooks prides itself on delivering great features at a great price and backing that with great customer service. Your small business owner will love accepting card payments again!

3) The Trust Factor story

You know payment acceptance tools are embedded right inside of your internet banking platform. There's a lot of obvious benefit from that placement...technology is updated in real time, it's convenient for your small business owners to access.

But did you know that customers trust these tools because they trust *you more*?

We talked to several users and asked them why they trust Autobooks with their payment processing services, and this is what they had to say:

Nick says...

"I liked immediately that it was integrated with my bank, that I didn't feel like it was...and although you guys are a separate company, I didn't feel like it was like a true third-party with Square and the others that I experienced."

Penni says...

"It lets me do my invoicing and collecting and was attached to the bank account I was using. So there's no transferring money. "

Harry says...

"If my financial institution says, these guys are legit, this is a legit company, we think it can help you out, that creates a lot of credibility to it as well. So you know, I think that's huge...it means that there's been some vetting of your company...by my financial institution that they're satisfied with your reliability, with the strength of your product, the strength of your service and the integrity of your operation that...so yeah. No, that's huge to me. Huge."

Your customers trust YOU. Trust that you'll provide great service, trust that you'll be there for them in their time of need. And they trust that you'd only partner with the best companies out there.

Grow that trust. Recommend Autobooks to your small business customers to help them succeed.