

Autobooks Standard Self-Service Enrollment*

Autobooks offers simple, self-service enrollment online. To get started, a user simply navigates to the Autobooks portion of **online banking**.

***Note:** This process applies to those Financial Institutions that use Vantiv Worldpay as their payment processor. Please see our non-Vantiv guide for details.

ENROLLMENT TAKEAWAYS:

- » Businesses can self-service online **24 hours** a day, **365 days** a year
- » Autobooks Terms and Conditions must be accepted to enroll

Check out the step-by-step enrollment process below:

Step 1:

- » The business owner will click on Autobooks within **online banking**.

The Terms and Conditions will display and allow the user to select which checking account they wish to deposit funds (if the user has more than one checking account with the financial institution).

Terms and Conditions

1. Definitions. In addition to terms defined in the Agreement, capitalized terms used in this Agreement shall have the following meanings:

(a) "Account" means that depository account at FI in User's name in conjunction with which the Services are provided to User.

(b) "Card Brand" means Visa Inc., MasterCard International, Inc., Discover Financial Services, Inc., American Express Travel Related Services Company, Inc., any debit network through which transactions may be routed, and the subsidiaries, successors, and assigns of the foregoing.

(c) "Confidential Information" means, whether disclosed orally, electronically, in writing, or by any other means: all information and materials provided or made available by Autobooks or its TPSPs in connection with this Agreement or the Services, including but not limited to their business, products, processing services, technology, systems, intellectual property, computer code, algorithms, schematics, data

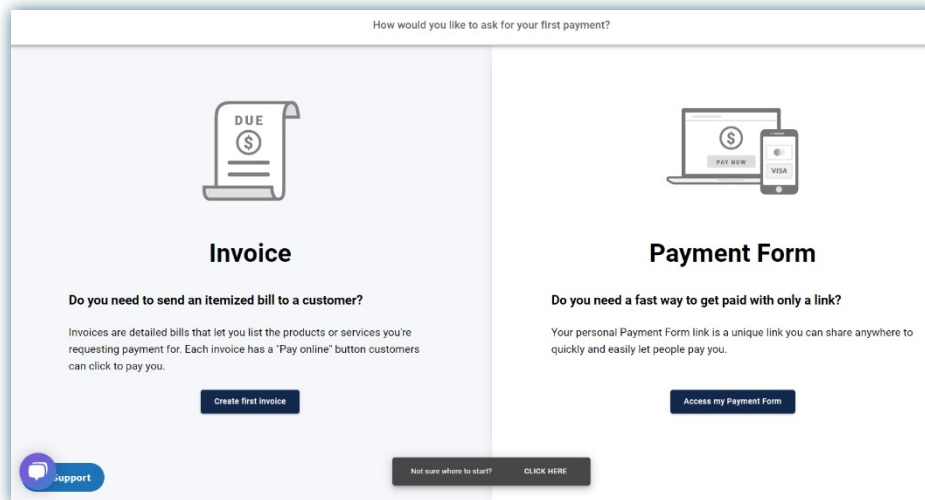
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Accept credit card payments at 3.49%, accept ACH payments at 1%. No monthly fees.

Accept Terms and Continue

Step 2:

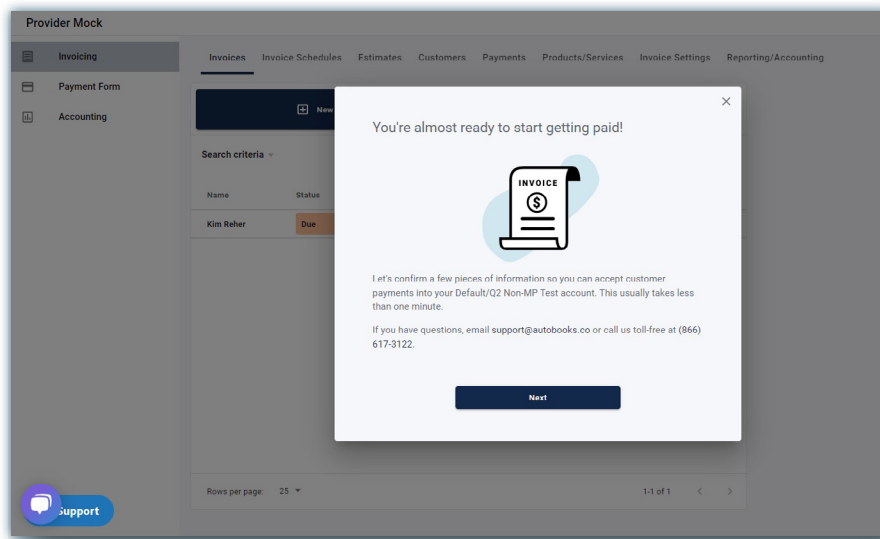
» The user will be taken to a short tutorial. They can choose to create an invoice or access their payment form..



Step 3:

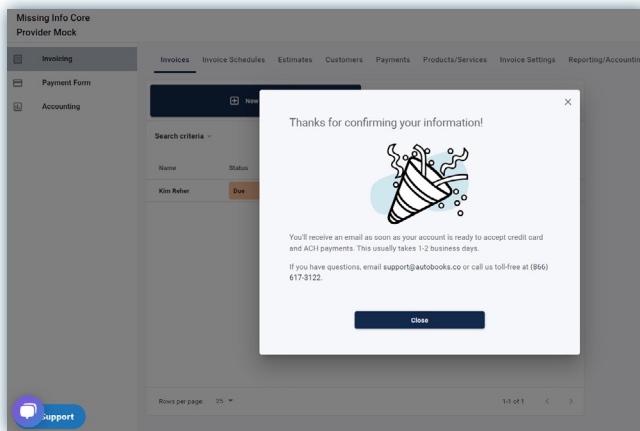
» If Autobooks is missing key data for the business once they complete their tutorial, we will ask for the information now.

Examples of key data are: owner name, phone number, date of birth, SSN, or home address of the business and/or business owner.



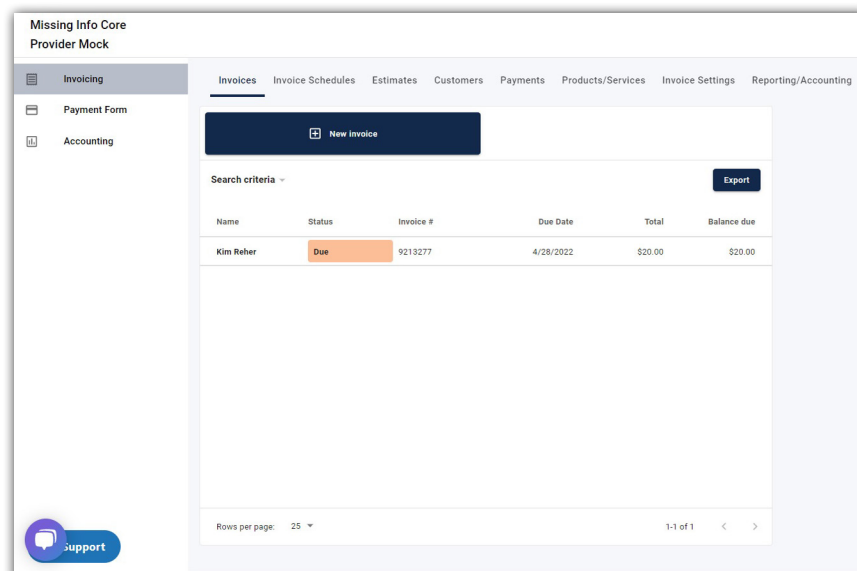
Step 4:

» User will see a confirmation once the **key data** has been entered. The user may click away from the key data gathering modal at any time before completion. If the user does click away, there will be a **persistent (clickable) reminder message** that key data is required for payment processing approval. The business cannot process their first payment without providing this information.



Step 5:

» The user will have access to Autobooks payment tools (Invoicing and Payment Link). The user can stay with the payment tool-only version (at no monthly subscription fee) OR they may upgrade to add accounting/reporting features for a monthly fee.



To add **Accounting and Reporting features** the business owner must click the tab labeled “Accounting” within the payment tools version. They will see monthly subscription and processing rate information, and click “Activate Autobooks” to complete their upgrade.

Once activated, the business owner will see their **Autobooks upgrade!**

