## 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 **Download PDF** 

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

Accept Terms and Continue



### <u>Step 2:</u>

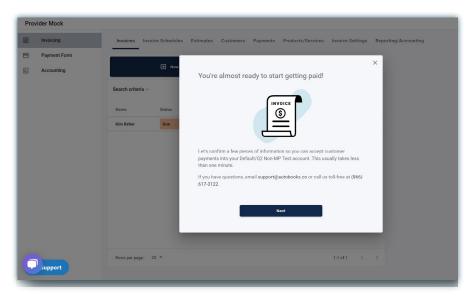
» The user will be taken to a short tutorial. They can choose to create an invoice or access their payment form..

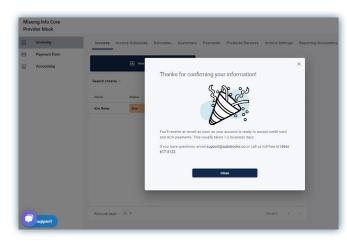
How would you like to ask for your first payment?						
Due S	S VSA					
Invoice	Payment Form					
Do you need to send an itemized bill to a customer?	Do you need a fast way to get paid with only a link?					
Invoices are detailed bills that let you list the products or services you're requesting payment for. Each invoice has a 'Pay online' button customers can click to pay you.	Your personal Payment Form link is a unique link you can share anywhere to quickly and easily let people pay you.					
Create first involce	Access my Payment Form					
Not sure where to star	2 CLICK HIRE					

### <u>Step 3:</u>

» 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.





#### <u>Step 4:</u>

» 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.

### <u>Step 5:</u>

» 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.

1	Invoicing	Invoices	Invoice Schedules	Estimates Customers	Payments Products/	Services Invoi	ce Settings Repo	orting/Accour
3	Payment Form	. New invoice						
11.	Accounting		+ New invol	Ce				
		Search criteria	ι v				Export	
		Name	Status	Invoice #	Due Date	Total	Balance due	
		Kim Reher	Due	9213277	4/28/2022	\$20.00	\$20.00	
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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!

