∞ autobooks

Autobooks Financial Institution Solution

Autobooks delivers the tools small businesses (SMBs) need to get paid — and the insights and services your financial institution needs to better serve and monetize those relationships.

Autobooks Embedded Solution

Made available through our partnerships with select digital banking providers. The payment acceptance modules and financial institution reporting features are entirely free — and are designed to make it easy for your customers to get paid directly inside your existing digital banking channels.

Autobooks Enterprise Solution

Includes all of the capabilities offered in our Embedded Solution — as well as additional program reporting, competitor displacement insights, and customer service features that will to take your small business program to the next level.

Embedded

Small business tools and financial institution insights for your existing digital banking channels.

✓

FREE – launch at no additional cost to your FI

✓

Accept digital payments module (in-app or online)

✓

Send online invoices module

✓

Accounting upgrade available within each module

✓

Module usage reporting for your FI

✓

On-demand training and customer service resources

Enterprise

Additional program reporting, customer services capabilities, and data-driven features to accelerate your small business growth opportunity.

✓

Includes ALL Embedded features

✓

Data-triggered messaging features

✓

Small business share of wallet reporting

✓

Financial institution benchmarking and peer analysis

✓

Bank, branch, and banker level program reporting

✓

Quarterly staff training

Full Feature List

	Embedded	Enterprise
Small Business Features		
Send invoices module	✓	✓
Accept payments module	✓	✓
Payment processing via cedit card & ACH	✓	✓
Accounting & financial management subscription upgrade	✓	✓
Bill Pay available with accounting upgrade	✓	✓
Access to payroll within Autobooks module (powered by Gusto)	Additional fee	Additional fee
Branding & Navigation for the Financial Institution		
Invoices & payment acceptance links include FI logo	✓	✓
Modules added to online banking dashboard	✓	✓
Direct access to the Autobooks module added to the primary menu navigation of online banking	✓	✓
Financial Institution Reporting		
Customer enrollment activity	✓	✓
Quarterly revenue share report	✓	✓
Real-time signup alerts sent to a single FI email address	✓	✓
Peer analysis & FI performance benchmarking		✓
Customer acquisition Funnel & retention analysis		✓
Program ROI analysis		✓
Program annual report		✓
Customer Service Features		
Access to on-demand training videos & webinars	✓	✓
Access to downloadable training content	✓	✓
Quarterly bank staff training		✓
Access to referral management system		✓
Realtime signup alerts sent directly to originating banker		✓
Bank, branch, and banker level referral reporting		✓

Full Feature List

	Embedded	Enterprise
Growth Marketing Features		
Marketing assets and templates available for download	✓	✓
FI-branded marketing assets	Additional fee	Additional fee
SMB checking account marketing best practices guide	✓	✓
Access to monthly marketing best practices webinars	✓	✓
Integrated product landing for FI website		✓
Competitor pricing calculator for SMB		✓
Integrated SMB demo appointment booking		✓
Support & Compliance		
Toll Free (general) Support	✓	✓
Email (general) Support	✓	✓
Access to compliance reporting & documentation	Requires NDA with Autobooks	Requires NDA with Autobooks
Competition Displacement Features		
Trigger-based customer messaging		✓
Realtime banker alerts sent to FI team members		✓
Wallet share reporting		✓
New Account Outreach & Onboarding Features		
Trigger-based customer messaging for new accounts		✓
Time from account open to first payment received reporting		✓
Initial funding amount reporting		✓
Total payments received in first 90 days reporting		✓
Integrated SMB demo appointment booking		✓

Ready to connect with an Autobooks team member?

Click below to learn more about the solution options we have with your digital banking provider.

CONTACT AUTOBOOKS →

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