

Accept Payments Now Module

Banno now offers a way to use accept payments electronically!

Accept Payments Now, powered by Autobooks, is perfect for customers that own small businesses and need the payment processing aspect of Autobooks, but do not need accounting or reporting features. There is no monthly usage fee. As always, if you or your customer need assistance (for anything Autobooks) don't hesitate to reach out to Autobooks Support at 866-617-3122 or Support@autobooks.co.

Accept Payments Now Module: For customers that own small businesses and don't send invoices to get paid, there is the Accept Payments Now module. This module provides the customer with the ability to collect payments through a custom payment form which is accessed through a payment link. Customers can share their payment form link (wherever they interact with their customers) to collect payments or donations electronically.

The Payment Form also comes in a Mobile App, available for Apple and Android devices. The customer simply downloads the app, pastes the Autobooks Payment Link when prompted, and clicks Submit. Their mobile device now can be used to accept payments from their customers face to face.

Customers can set up recurring payments through the Payment Form, too...which is perfect for non-profit businesses that rely on regular donations or businesses that charge customer membership fees and want to set up auto-pay.

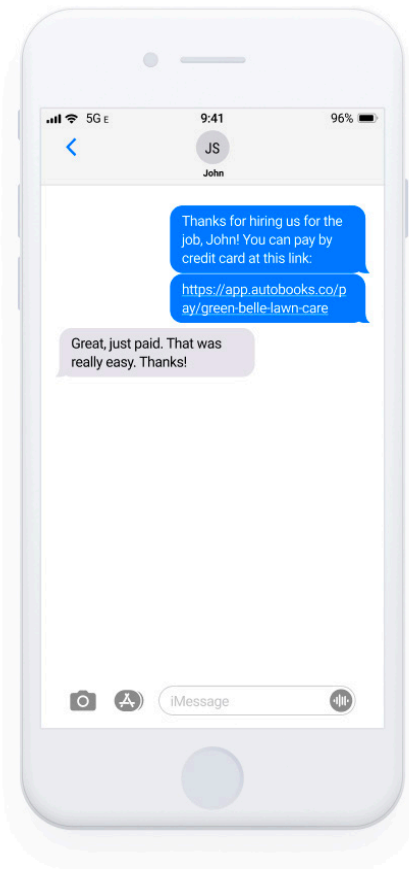
Customer payments settle into the designated deposit account within 2-3 business days depending on when the transaction is initiated by their customer/donor.

Payments collected through this module are subject to standard processing fees of 2.89% for credit/debit card payments and 1.00% for ACH payments, with no monthly usage fee. [Click here](#) for a step-by-step review of enrollment.

Where to Find the Accept Payments Now


The screenshot shows the YourFi mobile app dashboard for a user named Emma. The dashboard includes a sidebar menu with options like Dashboard, Messages, Accounts, Transfers, Remote deposits, Payments, Send money with Zelle®, Accept payments, and Support. The main content area displays account balances for Checking, Savings, and Loan, all at \$1,500.32. Below this are action buttons for Transfer, Pay a bill, Pay a person, Message, and Send money with Zelle. A 'Transactions' list shows recent payments to SOHO SUSHI BAR, WHOLE FOODS MARKET, and HONG KONG CHINESE RESTAURANT. On the right, an 'Accept a Payment' section features a button labeled 'Accept payment now' which is highlighted with an orange border.

What the Payment Form Looks Like



Make a payment to Green Belle Lawn Care

248-224-6211
Jane@GreenBelle.com



Customer details

First name * Last name *

Email * Company

What is this payment for?

Description *

Payment amount

Payment amount *

Payment schedule [What's this?](#)

One-time payment

Payment method

[Credit/Debit](#) [Bank account](#)

Name on card *

Card number *

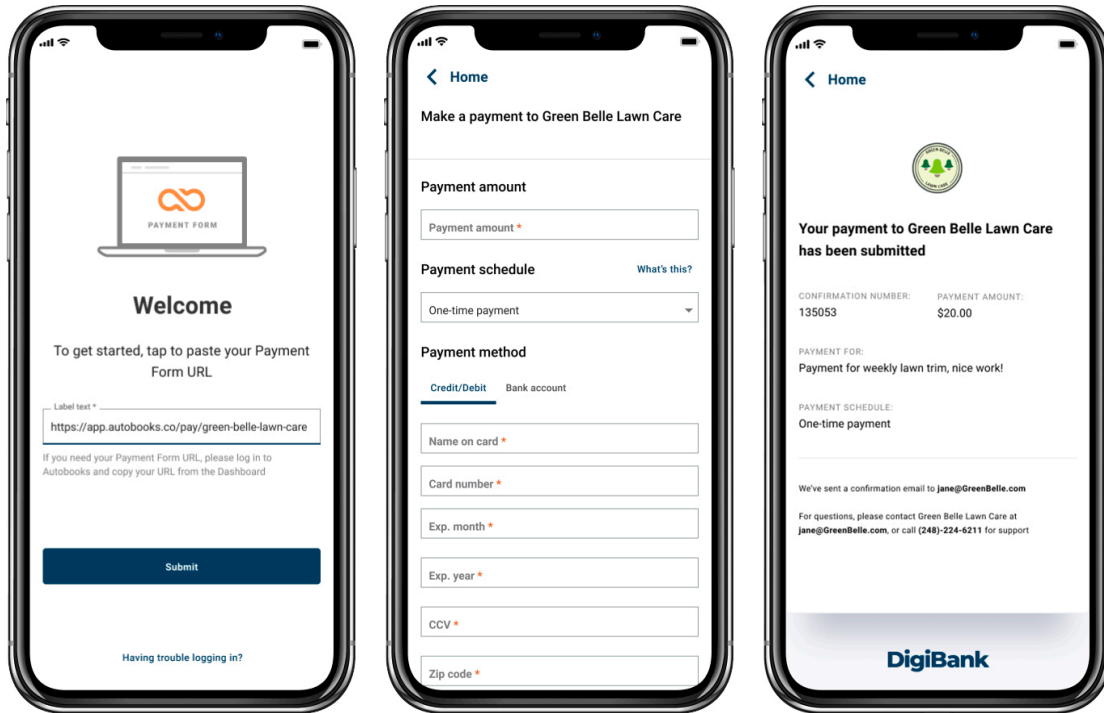
Exp. month * Exp. year * CCV * Zip code *

Security

I accept the terms and conditions.

[Submit payment](#)

What the Payment Form Mobile App Looks Like



Businesses Owners Love:

Sharing their link everywhere they communicate with customers: via text message, email, their business website, and social media.

Using the Payment App to collect payments when meeting with their customers face to face.

Streamlining the process of accepting credit cards: no lockup period with a third-party processor.

Paying the lowest transaction fees on the market.

Their Customers Love:

Getting to pay in the most convenient ways: by credit/debit card or straight from their checking account.

Paying from wherever they are, at whatever time of day is most convenient — whether that is two feet away from you at noon, or 200 miles away from you at midnight.

Not having to search for their check book.

Being able to set up recurring payments with ease.

Accept Payments Now – Module Enrollment

Enrollment is self-serve and available 24/7 within Online Banking.

Step 1: The user will accept Terms and Conditions to begin enrollment, then click 'Turn on my Payment Form now'.

Accept Payments sample

Start accepting credit cards in minutes with Payment Form

Your Payment Form is among the fastest, easiest, and most cost-effective ways to accept credit card payments online, directly into your {FI Name} Account.

Never worry about writing down (or losing) a customer's credit card information. Get your money in 2 days or less and pay **no monthly fees**.

I accept the [terms and conditions](#)

Turn on my Payment Form now

The screenshot shows a payment interface for 'Green Belle Lawn Care'. At the top, it displays the business name, phone number (989-274-0407), and email (Jen@greenbelle.com). Below this are several redacted fields for card information. The card type is identified as VISA. The card number is partially visible as '.... 1123'. The cardholder's name is 'Jane Doe' and the expiration date is 'Mar 2021'. A green 'Send payment' button is located at the bottom right of the form.

Step 2a: The user will provide information about their business so we can create their account.

Sign Up For Autobooks

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Please confirm the Primary Business Owner information below.
Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

First Name * Valerie	Last Name * Miller
Email * v.miller@gmail.com	Phone * 248-224-6211
Date of Birth * 01/02/1993	Title * CEO
SSN * XXX-XX-6789	? Edit

What is the Primary Owner's home address?
Home address should not be a P.O. Box.

Home Address 1 * 7970 UNIVERSITY AVE NE		
Home Address 2		
City * Fridley	State * MN	Zip Code * 55432-0000

Please confirm the business information below.

Business Name * VAL'S SNOW REMOVAL LLC	
DBA * Val's Snow Removal	?
<input type="checkbox"/> I do not have a DBA	
EIN / TIN	? Edit
<input checked="" type="checkbox"/> My EIN is the same as my SSN	

Please use the business address registered with the IRS.

Business Address 1 * 7970 UNIVERSITY AVE NE		
Home Address 2		
City * Fridley	State * MN	Zip Code * 55432-0000

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Step 2b: The user will complete the second enrollment form.

Business Information

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Please provide the additional information below.

First Name * <input type="text" value="2013"/>	Business Structure * <input type="text" value="Sole Proprietorship"/>
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Which industry does your business serve?

Industry *

Industry Code *

Which industry does your business serve?

Industry *

What is the largest single payment you expect to receive?

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

Largest Single Payment *


What is the average payment amount you expect to receive?

Average *

What is your estimated annual revenue?

Average *

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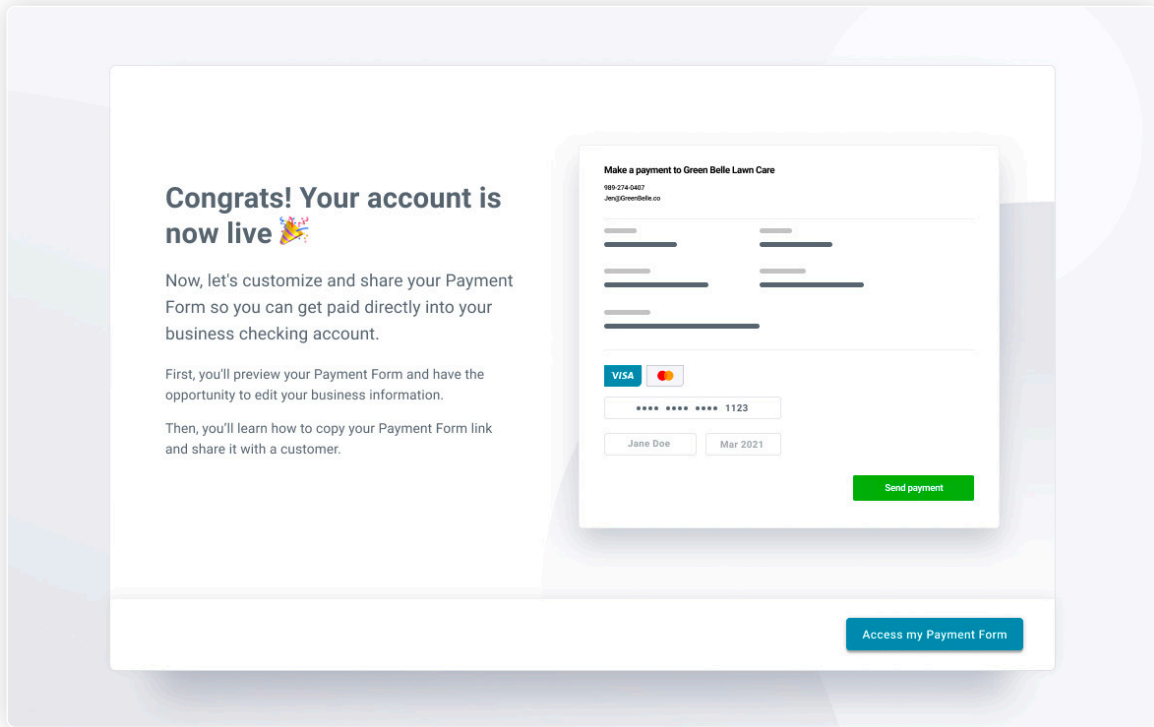


Congrats! Your Autobooks account is live and you're almost ready to get paid.

Your business now has two new ways to accept online payments.
Invoice and Payment Form

Now click "Start" to ask for your first payment.

Step 3: The user will be asked to access their payment form, and will go through a short tutorial.



Finished! The user will now see either the Send Invoices module OR the Accept Payment module.

