

Send Invoices Module

Banno now offers a new way to send invoices right from online banking!

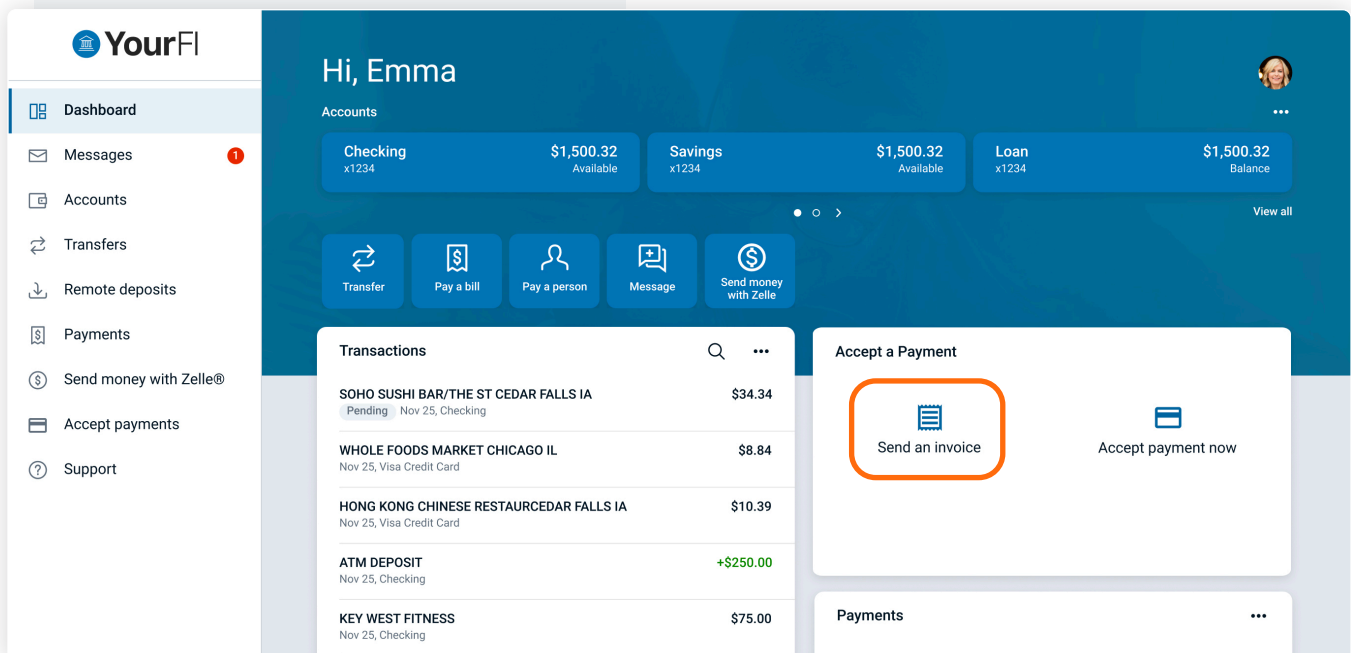
Send Invoices, powered by Autobooks, is perfect for customers that own small businesses and need the payment processing aspect of Autobooks, but do not need accounting or reporting features. There is no monthly usage fee for to send an invoice. As always, if you or your customer need assistance with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

Customers that own small businesses can now send invoices directly within their online banking session. With Send Invoices, the customer can send custom professional invoices, set automated customer reminders, and track who has and hasn't paid.

When accepting payments electronically through a sent invoice, customer payments settle into their designated deposit account within 2-3 business days depending on when the transaction is initiated by their customer/donor.

Payments collected through Send Invoice 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 Send Invoices module



What Send Invoices Looks Like

The screenshot displays the 'Invoices' management interface. At the top, there are navigation tabs: Invoices, Estimates, Customers, Payments, Products/Services, and Invoice Settings. A 'New invoice' button is prominently displayed. Below it is a search criteria section with an 'Export' button. A table lists several invoices with columns for Name, Status, Invoice #, Due date, Total amount, and Balance due. The table includes entries for Calvin Warren (Due), Gladys Alexander (Due), Diane McCoy (Partial payment), Randall Miles (Active), Johnny Pena (Due), Ronald Webb (Paid), Serenity Fisher (Past Due), Nathan Wilson (Active), Bessie Hawkins (Cancelled), and Marvin Russell (Partial payment). A 'Create an invoice' modal is open, showing a form for 'Sally Conwell Pup Walkers Inc.' with fields for Customer, Due date (09/23/2021), and a 'Make recurring' toggle. The form includes a table for adding line items with columns for Product/Service, Qty, Price, and Amount. A 'Standard daily walk' item is added with a quantity of 5, a price of \$10.00, and a total amount of \$50.00. The modal also features buttons for 'Add line item', 'Add discount', and 'Turn on sales tax', along with a 'Total' field showing \$50.00. On the right side of the modal, there are buttons for 'Send invoice', 'Preview invoice', 'Save invoice as draft', and 'Save to list'.

Name	Status	Invoice #	Due date	Total amount	Balance due
Calvin Warren	Due	934248	02/22/2020	\$242.00	\$242.00
Gladys Alexander	Due	934265	02/15/2020	\$73.00	\$73.00
Diane McCoy	Partial payment	934363	02/04/20		
Randall Miles	Active	934250	01/28/20		
Johnny Pena	Due	934398	01/28/20		
Ronald Webb	Paid	934327	01/24/20		
Serenity Fisher	Past Due	934276	01/23/20		
Nathan Wilson	Active	934268	01/23/20		
Bessie Hawkins	Cancelled	934373	01/17/20		
Marvin Russell	Partial payment	934274	01/17/20		

Businesses Owners Love:

Sending professional, custom invoices to their customers via email.

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.

Send Invoices – 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 'Create and send your First Invoice'.

Send Invoice sample

Send a professional invoice right to your customer's inbox

Create and send a great-looking invoice in minutes. Delight your customers with easy online payment options. You'll be able to see who paid their invoice, and who is past due.

I accept the [terms and conditions](#)

Create and send your first invoice

The image shows a sample invoice from DigiBank. At the top left is a lawnmower icon. The word 'Invoice' is in the top right. Below the icon, it says '\$566.00 Balance due' with an orange 'Due' button next to it. The due date is '11/4/2020' with a 'Play online' button to its right. The business name is 'Green Belle Lawn Care' with phone number '817-555-1234' and email 'stephanie@greenbelle.com'. The invoice number is '12345' and the account number is '67890'. The customer is 'Carol Sanders'. A table lists the service: 'Standard Lawn Trim' with a quantity of 1, unit price of \$55.00, and amount of \$55.00. The description is 'Basic cut on front and back lawn'. The total is \$55.00. A message says 'Some patches in the back yard may need fertilizer soon, something to consider!'. It ends with 'Thank you!' and the DigiBank logo.

Product/Service	QTY	Unit Price	Amount
Standard Lawn Trim	1	\$55.00	\$55.00

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

Sign Up For Autobooks

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 * Business Structure *

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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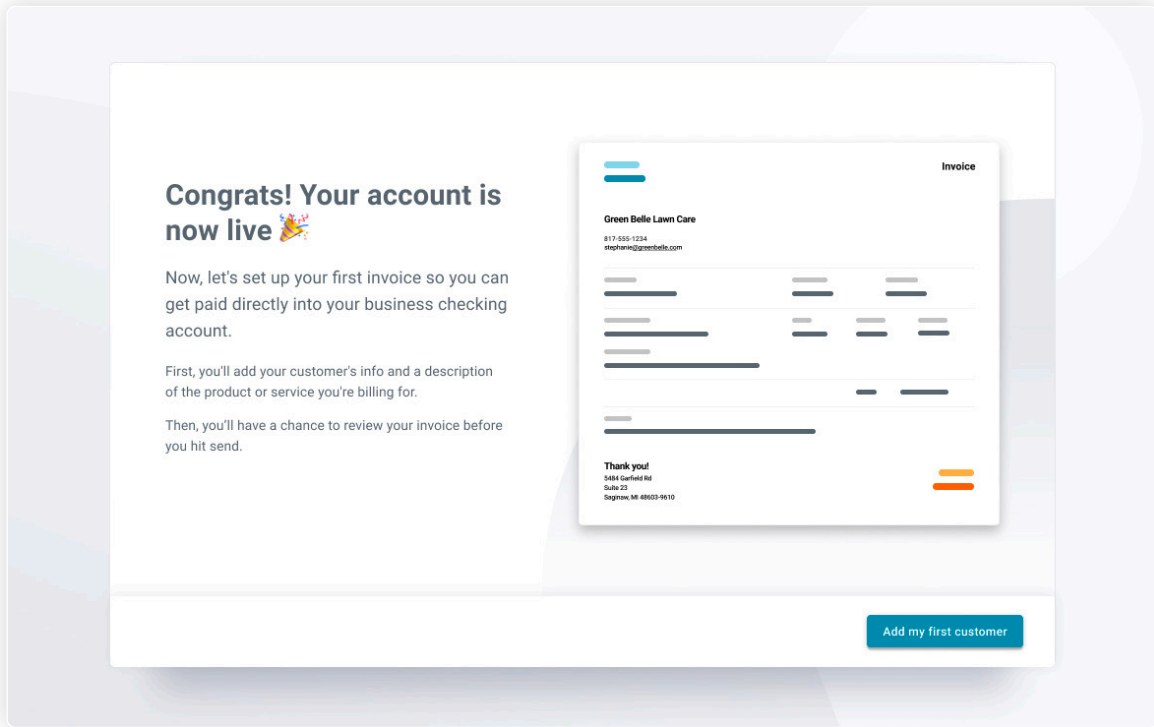


Congrats! Your Autobooks account is live and you're almost ready to get paid.

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 Create an Invoice



Finished! The user will now see the Send Invoices module within Online Banking.

Send Invoices sample

[Invoices](#) [Estimates](#) [Customers](#) [Payments](#) [Products/Services](#) [Invoice Settings](#)

[+ New invoice](#)

Search criteria [Export](#)

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Gladys Alexander	Due	934265	02/15/2020	\$73.00	\$73.00
Diane Mccoy	Partial payment	934363	02/04/2020 ↻	\$257.00	\$170.00
Randall Miles	Active	934250	01/28/2020 ↻	\$185.00	
Johnny Pena	Due	934398	01/28/2020	\$67.00	\$67.00
Ronald Webb	Paid	934327	01/24/2020	\$218.00	\$0.00
Serenity Fisher	Past Due	934276	01/23/2020 ↻	\$115.00	\$115.00
Nathan Wilson	Active	934268	01/23/2020 ↻	\$92.00	\$0.00
Bessie Hawkins	Cancelled	934373	01/17/2020	\$214.00	
Marvin Russell	Partial payment	934274	01/17/2020 ↻	\$235.00	\$30.00

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