

Autobooks Standard Self-Service Enrollment

Autobooks offers simple, self-service enrollment online. To get started, a user simply navigates to the Autobooks portion of their online banking. Businesses can self-service online, 24 hours a day, 365 days a year.

Follow the step-by-step enrollment process for Autobooks below:

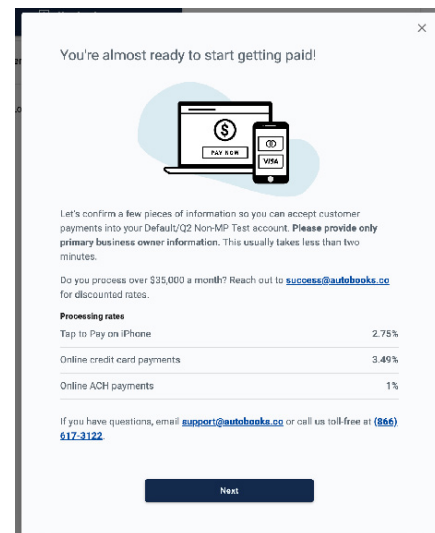
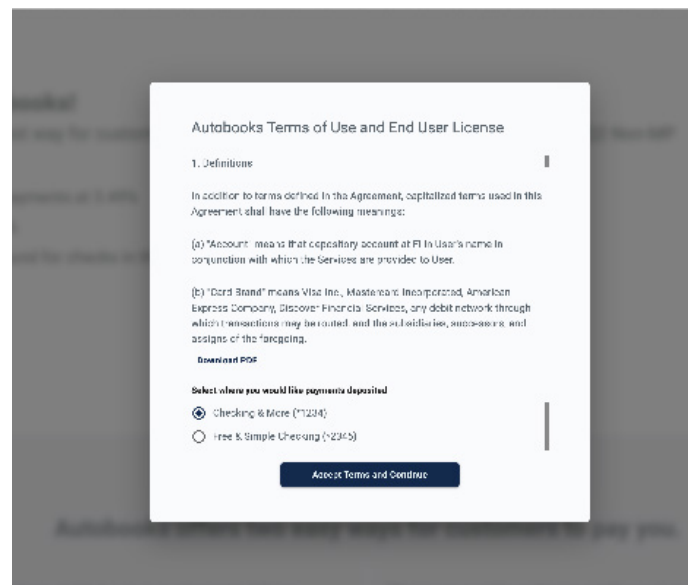
1. The new user will click on Autobooks from their online banking platform. The Terms and Conditions modal will display and allow the user to select which checking account they wish to deposit funds (if user has more than one checking account with the financial institution).

Once terms and conditions have been accepted, the user is presented with the modal to complete any missing information in order to request payment approval through Autobooks.

The missing information needed could include full name, phone number, the business address, EIN, and revenue information about the business.

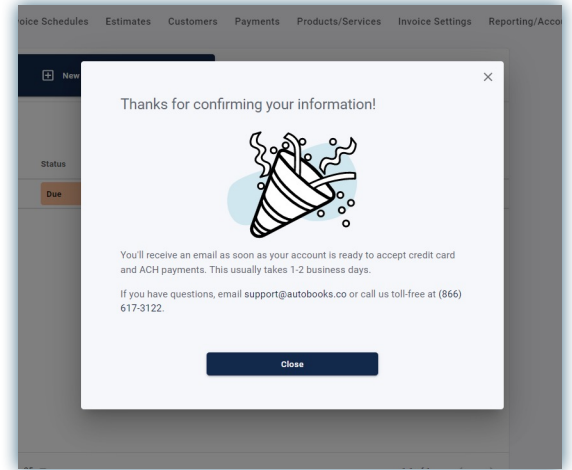
NOTE: The user does have the option to exit out of the modal when submitting missing information. If they choose to exit out, they will see a small pop-up at the bottom in which they can click on to continue through enrollment, and submit missing information at any time.

There is the possibility that the team may need to validate some of this information before we can finish payment enablement. Please be on the lookout for a call or email from a member of our Customer Success team to review the information you provided.



2. One completed, the user will see a confirmation that the key data has been entered and submitted.

Our onboarding team begins reviewing the information about your business we received when you enrolled in order to approve your business for accepting payments digitally.

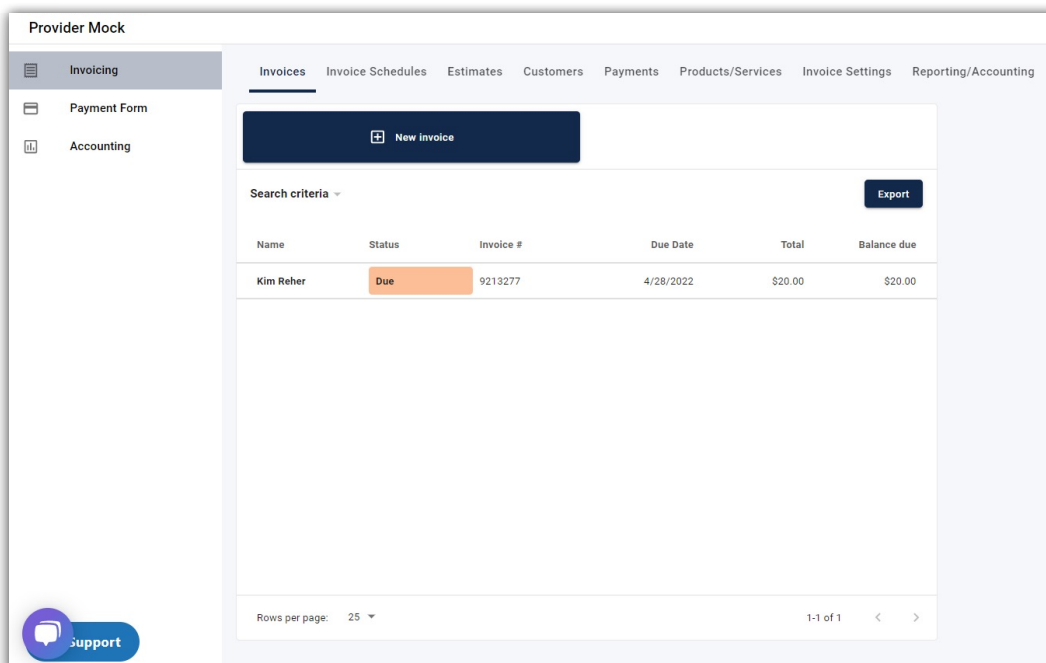


3. Once information has been verified, you can expect two separate automated emails from Autobooks:

The first email will let you know that your ability to collect online bank account payments (ACH) has been successfully enabled

The second email will let you know that your ability to collect card-based payments (credit and debit cards) has been enabled

After receiving both emails, your account will be fully configured and you'll be able to start accepting online payments!



Once complete, you have the option to upgrade your Autobooks experience with additional features!

To add Account, Reporting, and other features the business owner must click the tab labeled 'Accounting'. This tab will provide the business owner with clear subscription and processing rate information, with a call to action to Activate Autobooks.

Once activated, the business owner will see the full Autobooks view!

