



Digital One Business Mobile Autobooks Feature Guide

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Overview of Autobooks

The Autobooks service is a secure platform designed for small businesses to send invoices and accept payments. It streamlines Account Payable (AP) workflows, providing significant cost-savings.

Autobooks features have been integrated in Digital One™ Business Mobile 6.0 which enables you to send invoices and accept payments seamlessly.

You can access Autobooks feature through the **More > Get Paid** module of Digital One Business Mobile.

Audience

This guide is intended for Digital One Business Mobile 6.0 administrators and users, providing instructions for enabling and using Autobooks features.

Enabling Autobooks Features in Digital One Business Mobile

To enable Autobooks features in Digital One Business Mobile 6.0, your financial institution must complete setup tasks at the bank and company levels.

- A user with access to Digital One Business Service Tool (Digital One BST) must enable the Autobooks services and assign the Autobooks features to user accounts at the company level.
- A primary user with administrative privileges in Digital One Business must then assign the Autobooks service to other users within the company.

Enable Features of Autobooks at the Company Level


To enable the Autobooks feature at the company level, you must select the **AUTOBOOKS SSO** service in Digital One BST.

Before you begin

You must have the following roles and entitlements to complete this task:

Application	Role	Entitlement	Purpose
Digital Administration Tool (DAT)	FI User	Digital One BST Access	Allows you to access Digital One BST from DAT.
Digital One BST	SetupUser	Create	Allows you to assign services to a company.

Procedure

1. Sign in to DAT.
2. Select the **Digital One Business Service Tool (BST)** link.
3. Set the working company bank.
 - a. Select the **Company ID** link.
 - b. Enter the company ID in the **Company Name or ID** field and then select the Set Working Company  icon.
4. Select **Company Setup > Maintain Company > Package & Company Service Enablements**.
5. Select the **AUTOBOOKS SSO** checkbox.

<input checked="" type="checkbox"/> AUTOBOOKS SSO	Autobooks
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6. Select **Save Changes**.

Results

The Autobooks features have been enabled for your company.


Assign Autobooks Features to Accounts at the Company Level

Before you begin

You must have the following roles and entitlements to complete this task:

Application	Role	Entitlement	Purpose
Digital Administration Tool (DAT)	FI User	Digital One BST Access	Allows you to access Digital One BST from DAT.
Digital One Business Service Tool (Digital One BST)	SetupUser	Create	Allows you to assign services to a company.

Procedure

1. Sign in to DAT.
2. Select the **Digital One Business Service Tool (BST)** link.
3. Set the working company bank.
 - a. Select the **Company ID** link.
 - b. Enter the company ID in the **Company Name or ID** field and then select the Set Working Company  icon.
4. Select **Company Setup > Maintain Company > Accounts > Account Maintenance > Account Service Maintenance**.
5. Select **Autobooks** from the list of services.

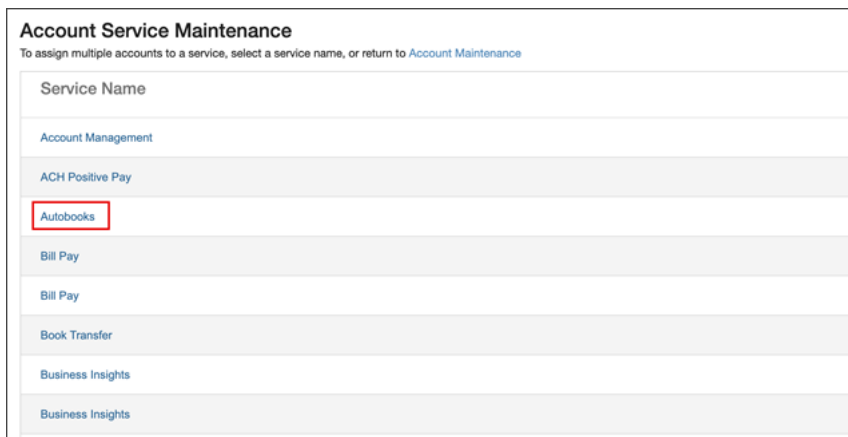


Figure 1: Account Service Maintenance Page

6. Select the checkbox beside the eligible accounts to assign them the Autobooks service.

Account Service Maintenance
Select or deselect accounts to assign to each service and click 'Save Changes', or return to [Account Service Maintenance](#). Deselecting an account assigned to a service could affect the user's access and functionality, including the cancellation of scheduled requests.

Autobooks

Enable the account for the service	Account Number	Account Description	Account Type
<input type="checkbox"/>		Loan Account	Loan
<input type="checkbox"/>		CERTIFICATE OF DEPOSIT	CertificateOfDeposit
<input type="checkbox"/>		Loan Account	Loan
<input type="checkbox"/>		AAS ACCOUNT TYPE	Checking
<input type="checkbox"/>		AAS ACCOUNT TYPE	Checking
<input type="checkbox"/>		CERTIFICATE OF DEPOSIT	CertificateOfDeposit
<input type="checkbox"/>		CERTIFICATE OF DEPOSIT	CertificateOfDeposit

Figure 2: Selecting the Account for Autobooks

7. Select **Save Changes**.

Assign the Autobooks Service to Company Users

Before you begin

To assign the Autobooks service, a company user must have the following roles and entitlements:

Role	Service	Account Entitlement
Administration	Autobooks	Entitled Account

Procedure

1. Sign in to Digital One Business Online.
2. Select **Administration > Company Administration**.
3. In the **User ID** column, select the link for the user to whom you want to assign the Autobooks service.

Company Administration

[Manage Users](#) [Account Information](#) [Account Administration](#) [Approval Settings](#) [User Setup Report](#) [Invalid Login Report](#)



User Administration
Review the options listed below for available user administration tasks. To quickly entitle a new account for company users, go to [Account Administration](#).

New User
You will have an opportunity to copy an existing user during the process.
[Create New User](#)

Manage Existing Users
To manage a user's profile, roles, service & accounts, system access, or change limits, click on the appropriate user ID. Disabled users can only be unlocked by contacting your financial institution.

User ID	First Name	Last Name	Status	
ADMIN	Admin	User	Locked	System Access
ALISA	Alisa	John	Active	System Access
HDHNGRA	Multiple	Business	Active	System Access
DANB	Dan	Bennett	Active	System Access
DDHNGRA	Divine	Dhingra	Active	System Access

Figure 3: User Administration Section

4. Select the **Edit Services & Accounts**  icon.
5. Select the add service  icon beside the Autobooks service.
6. Select the checkboxes for the accounts you want to entitle for that user for the Autobooks service.
7. Select **Save Changes**.

Accessing the Autobook Features

The Autobooks service, integrated into Digital One Business Mobile, enables you to easily manage payments and invoices.

You can access Autobooks through the **More > Get Paid** module in Digital One Business Mobile.

The following features are available:

- **Send an Invoice:** Create and send customizable digital invoices to your customers.
- **Accept a Payment:** Receive digital payments via card or Automated Clearing House (ACH) transfers.

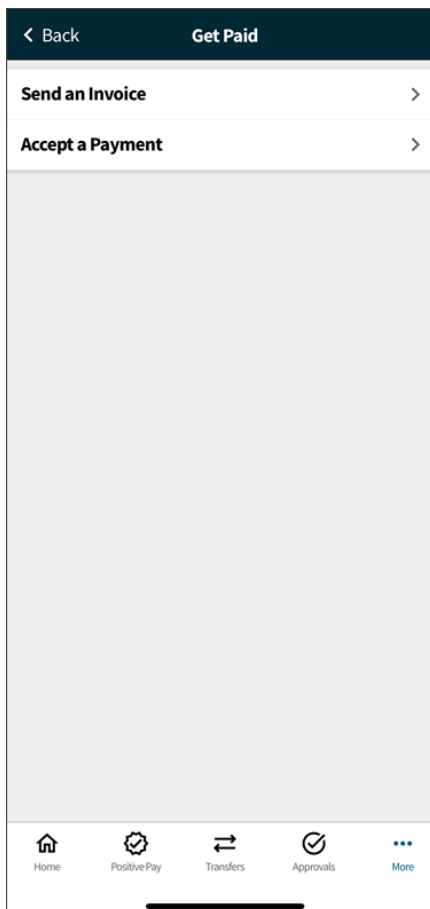


Figure 4: The Get Paid Page in Digital One Business Mobile

Enroll in Autobooks Features

Before you begin

If you are a new user to Autobooks, you must complete the enrollment process before accessing Autobooks services.

Procedure

1. Sign in to Digital One Business Mobile.
2. Select the **More** menu from the navigation bar.
3. Under **INVOICING, ONLINE & IN-APP PAYMENTS**, select **Get Paid**.

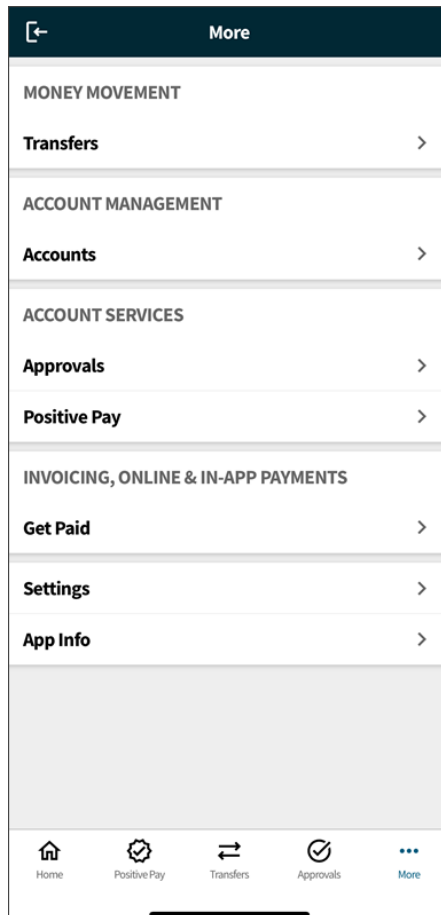


Figure 5: Get Paid Option in More

4. Select either **Accept a Payment** or **Send an Invoice**.

You will be redirected to the Autobooks application to review and accept the terms and conditions.

5. On the **Autobooks Terms of Use and End User License** page, select the account you wish to link with Autobooks.

Note: You can link either a Checking or Savings accounts. Only one account can be designated as the primary account. This account will receive processed payments and be used for transaction fees deductions.

6. Select **Accept Terms and Continue**.

7. Follow the prompts to create your business profile with Autobooks.

Note: After submitting profile, the Autobooks team will review your request and notify you via email.

For more information on enrolling in Autobooks services, refer [Autobooks Enrollment for FIS mobile users](#).

Send an Invoice Through Autobooks

For users entitled to send an invoice, the **Send an Invoice** option will be enabled in the **Get Paid** module of Digital One Business Mobile.

Procedure

1. Sign in to Digital One Business Mobile.
2. Select the **More** menu from the navigation bar.
3. Under **INVOICING, ONLINE & IN-APP PAYMENTS**, select **Get Paid**.

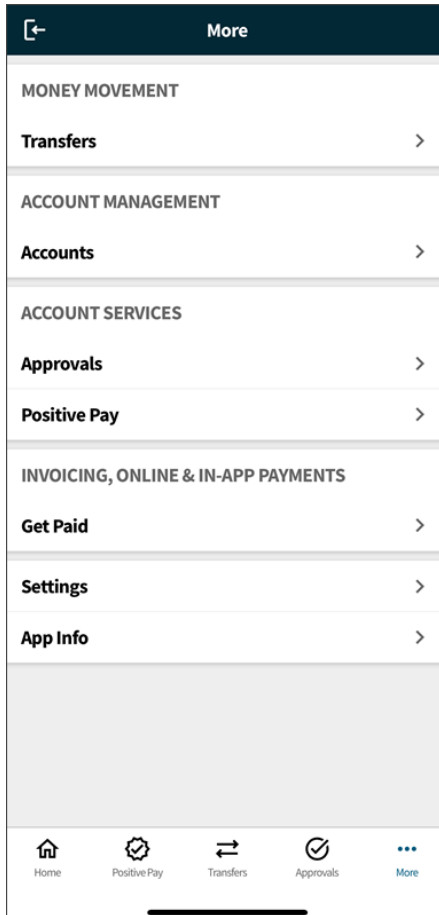


Figure 6: Get Paid Option in More

4. Select **Send an Invoice**.

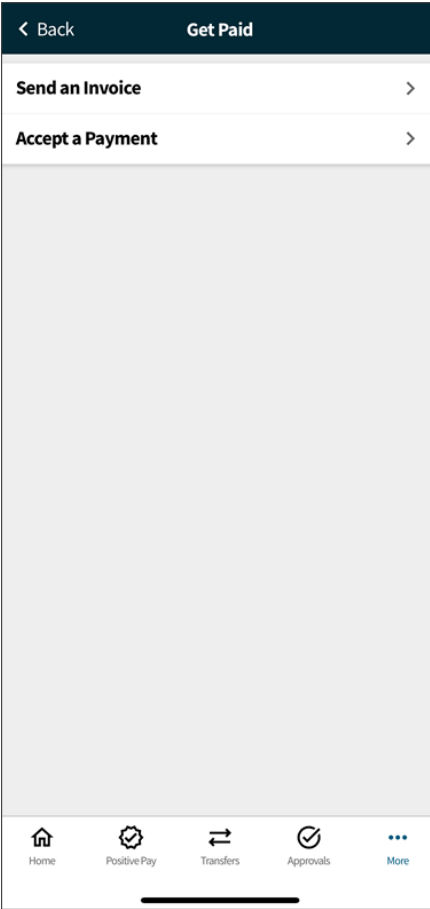


Figure 7: Get Paid Page in Digital One Business Mobile

- 5. If your profile is associated with multiple companies, select the appropriate company to proceed.



Figure 8: Company Selection Page

You will be redirected to the **Invoices** page of Autobooks.

- 6. On the **Invoices** page, select the **Create your first invoice** or **Set up an invoice schedule** button.

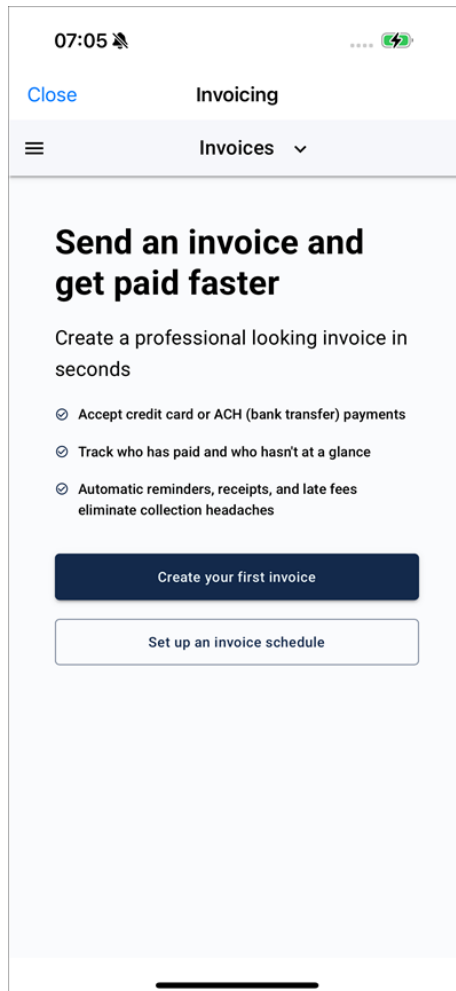


Figure 9: Invoices Page of Autobooks

7. Follow the prompts and enter the required details to generate the invoice.

For more information on creating and sending invoices, refer [Create and send an invoice](#) in Autobooks.

Accept Payment Through Autobooks

For users entitled to accept a payment, the **Accept a Payment** option will be enabled in the **Get Paid** module of Digital One Business Mobile.

Procedure

1. Sign in to Digital One Business Mobile.
2. Select the **More** menu from the navigation bar.
3. Under **INVOICING, ONLINE & IN-APP PAYMENTS**, select **Get Paid**.

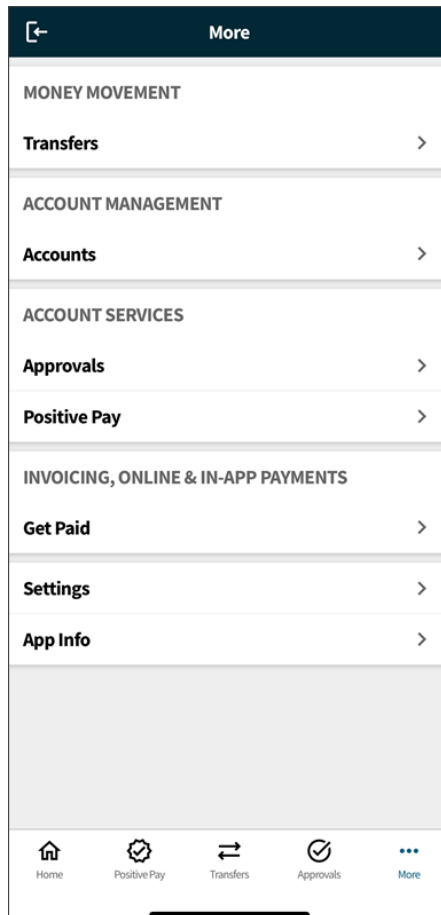


Figure 10: Get Paid Option in More

4. On the **Get Paid** page, select **Accept a Payment**.

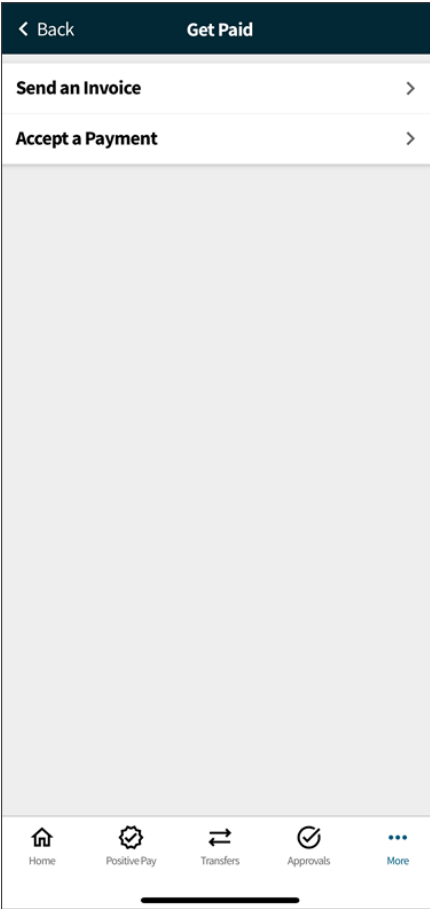


Figure 11: Get Paid Page in Digital One Business Mobile

- 5. If your profile is associated with multiple companies, select the appropriate company to proceed.



Figure 12: Company Selection Page

You will be redirected to the **Payment Link** page in Autobooks.

- 6. On the **Payment Link** page, select the required payment option.

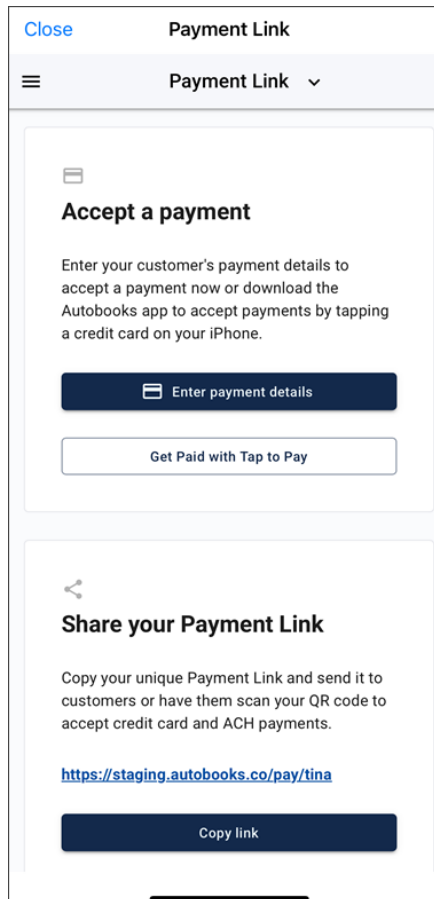


Figure 13: Payment Link Page of Autobooks

7. Follow the prompts and enter the required details to complete the payment.
For more information on making a payment, refer [Payment Link/Accept a Payment](#) in Autobooks.