autobooks

LEARNING SPOTLIGHT : AUTOBOOKS

Enable small businesses to accept digital payments, manage cash flow, automate accounting and access financial reporting directly from online and mobile banking.

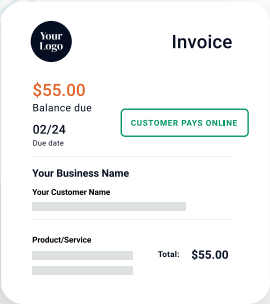
OVERVIEW

Autobooks On-Demand Learning

Our product suite seamlessly integrates into your existing digital banking channels making it easy for small businesses to get paid and directly manage their finances with you. The following pages will introduce you to the features of Autobooks, guiding you through what you need to know to get started. In addition, each section has quick link access and QR Codes to make learning easy!

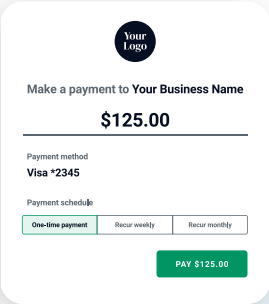
READY TO LEARN MORE?

Scan the QR Code or visit the Autobooks Knowledge Base: https://help.autobooks.co



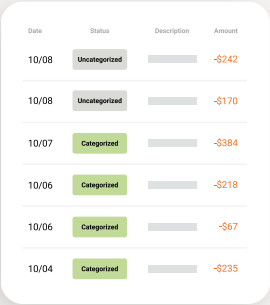
ONLINE INVOICES

Gives businesses the ability to easily send professional invoices that are payable online.



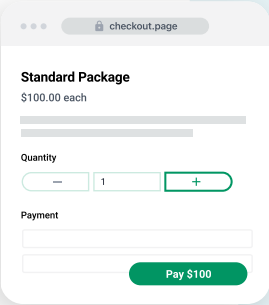
PAYMENT LINK

Offers businesses and nonprofits a way to accept payments online or in-app, via payment link or QR code.



REPORTING & ACCOUNTING

Provides basic bookkeeping and financial reports to track spending and earnings.

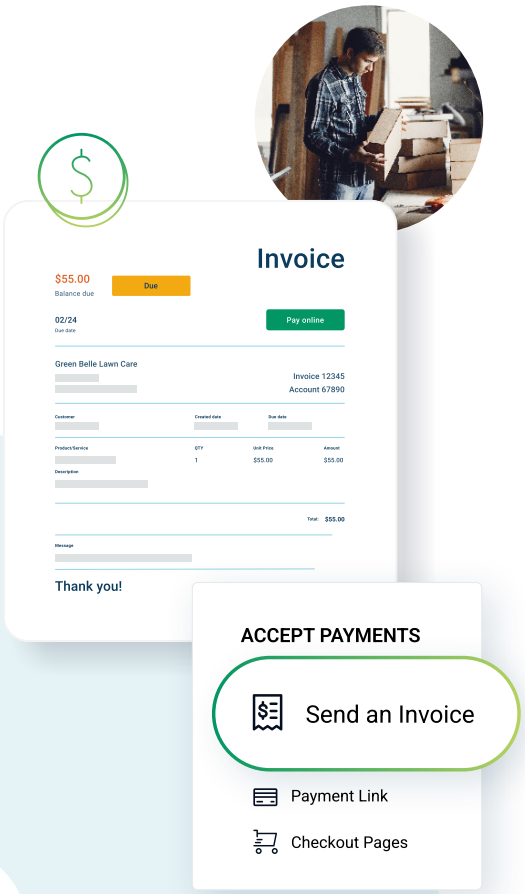


CHECKOUT PAGES

Designed to help businesses and nonprofits sell single items, quantity purchases, or collect deposit fees and streamline donations.

LEARNING SPOTLIGHT : INVOICING

CREATE AND SEND PROFESSIONAL INVOICES DIRECTLY INSIDE ONLINE AND MOBILE BANKING.



Make it easy for customers to pay invoices.

By giving customers flexibility in how they pay, it shortens the time it takes to get paid. That's why 95% of Autobooks users are paid within five business days after sending an invoice.

Send an invoice directly inside online or mobile banking.

Why maintain another payment app when it's not necessary? Instead, rely on a platform that's trusted, is always secure, and easy to use. Just log in and click 'Send an Invoice' to get started.

Customize invoices to fit any business or organization.

It's a snap to make it professional with our template. Upload logos, change the colors to match branding, and create custom messages.

Scan this QR Code or click here to see invoicing in action!

VISIT OUR KNOWLEDGE BASE FOR ALL INVOICING FEATURES AND INFORMATION!

Scan this QR Code or click to visit our Knowledge Base at the link below!

SEND AN INVOICE

HOW IT WORKS

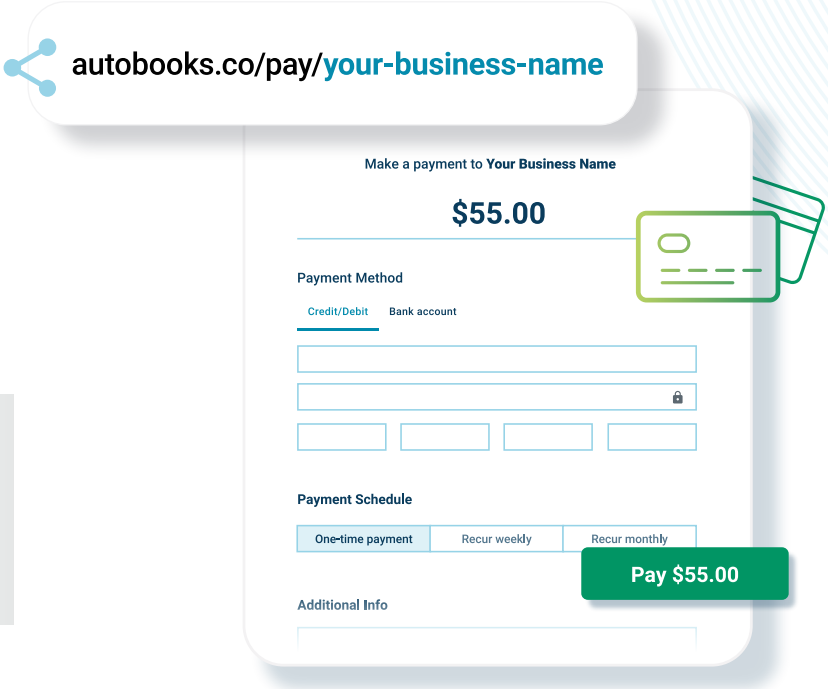
- **Complete the invoice inside online banking.** Once completed, an invoice is sent directly to the payor via email.
- The payor will click the link in their email to view their invoice **in a secure web browser.**
- **Invoices can be paid using any major card**, including American Express®, or even by ACH bank transfer.
- Funds go directly into a business' or nonprofit's checking account and are usually deposited within two business days. **They're never tied up or held by another platform.**

LEARNING SPOTLIGHT : PAYMENT LINK

OFFER SMALL BUSINESS AND NONPROFITS AN EASY WAY TO COLLECT ONLINE OR IN-APP PAYMENTS FROM CUSTOMERS.

Accept payments directly inside online and mobile banking.

Easily take a card or ACH payment over the phone or on the spot. Just click Payment Link inside online or mobile banking to access your unique Autobooks link.



Scan this QR Code or click here to see the Payment Link in action!

Share a secure link or QR Code to accept payments online.

When enrolled in Autobooks, a business or nonprofit is assigned a unique URL for the Autobooks Payment Link. This link can be shared by text, email, or added to any web page. Autobooks also provides a QR code that can be displayed or printed on materials.

Scan this QR Code or click here to see the Payment Link in action!

VISIT OUR KNOWLEDGE BASE FOR ALL PAYMENT LINK INFORMATION!

Scan this QR Code or click to visit our Knowledge Base at the link below!

PAYMENT LINK / ACCEPT A PAYMENT

HOW IT WORKS

- **Take a customer payment on the spot** — just enter payment details into the payment form inside online or mobile banking.
- Prefer to have a customer pay from their own device? **Text or email a secure payment link**, where they can complete the transaction themselves.
- **Access a QR code that's connected to your Payment Link**. Display it anywhere to accept payments (stickers, pamphlets, business cards, and more!).
- Funds go directly into the checking account and are usually deposited within two business days. **They're never tied up or held by another platform**.

LEARNING SPOTLIGHT : CHECKOUT PAGES

CHECKOUT PAGES CAN BE CREATED IN MINUTES TO SELL PRODUCTS AND SERVICES OR QUANTITY PACKAGES, ASSESS MEMBERSHIP FEES, OR COLLECT DONATIONS.

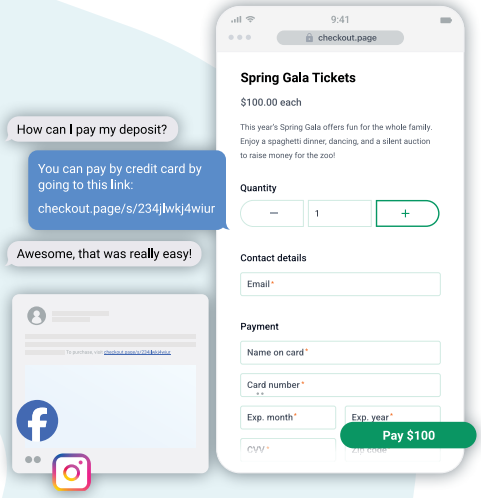
Sell single items, offer quantity purchases, or build a packaged offering.

Easily setup Checkout Pages to offer a single item or have quantity selection. Build a package offering with detailed descriptions that payors can easily select and purchase.

Allow clients to pay deposits or other fees online, and streamline memberships or donation collection.

Checkout Pages simplify payment collection for deposits, bookings, classes, registrations, and event fees. By sharing a Checkout Page link, organizations can collect deposit fees from customers before starting a project or direct members to pay dues or fees. Checkout Pages also making collecting donations at any event simple and quick.

Scan this QR Code or **click here** to learn how to create and share a Checkout Page!



Manage Checkout Page information and sales in one place inside online or mobile banking.

All sales are organized for easy viewing and can be exported in an easy to read spreadsheet with just a click. Additional payor information collected through a Checkout Page can be found easily inside the sales tab.

Scan this QR Code or **click here** to learn about managing Checkout Pages!

VISIT OUR KNOWLEDGE BASE FOR ALL CHECKOUT PAGE INFORMATION!

Scan this QR Code or click to visit our Knowledge Base at the link below!

CHECKOUT PAGES

HOW IT WORKS

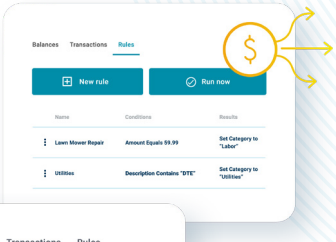
- **Create a Checkout Page for a product, service, cause, or event in a few clicks.** Add a detailed description or choose to collect additional customer information during the transaction.
- A Checkout Page is simple to share. **The link can be shared directly via text or email, or added to a website or social media profile.**
- When a payment is made, funds go directly into the organization's checking account and usually deposited within two business days. **They're never tied up or held by another platform.**

LEARNING SPOTLIGHT : ACCOUNTING AND FINANCIAL REPORTING

AN OPTIONAL UPGRADE TO OUR PREMIUM PLAN ADDS ACCOUNTING AND REPORTING FEATURES INSIDE ONLINE BANKING.

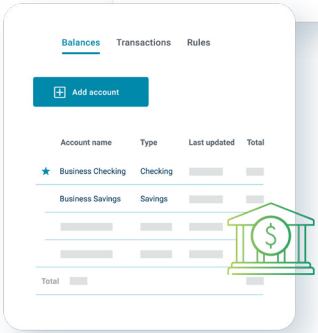
Home base for all business finances.

Every transaction inside a business' checking account is automatically synced within Autobooks. In addition, other accounts and credit cards can be linked from other financial institutions to an Autobooks account. This means that every transaction will be accounted for.



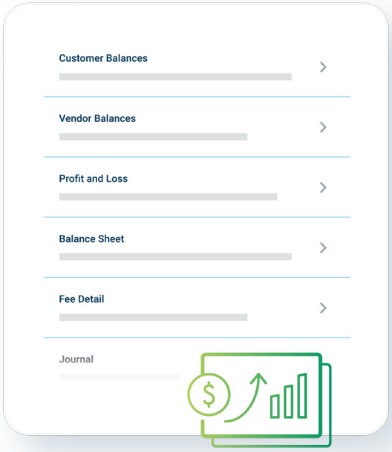
Features include:

- Connected to your bank account - bank transactions import automatically.
- Import additional transaction data from other bank accounts and credit cards.
- Track income, expenses, sales, and sales tax.
- Create rules to automate bookkeeping.
- Manage tax deductions.
- Share your books with an accountant.
- Manage vendors and vendor payments
- Create multiple users.



Stay up to date with built-in reporting.

Reports to track business income and expenses make tax time simple. Our budgeting tool is a great way to keep on top of spending and business health.



Enhanced reports include:

- Payment management
- Sales and Sales Tax
- Budget
- Profit/Loss
- Expense/Fee management
- Balance sheets and more!

VISIT OUR KNOWLEDGE BASE FOR ALL ACCOUNTING AND REPORTING INFORMATION!

ACCOUNTING

REPORTING