

# Welcome!



#SmallBusinessObsessed

FOR INTERNAL TRAINING USE ONLY

Welcome to Autobooks training!

# Autobooks Basics

---

FOR INTERNAL TRAINING USE ONLY

autobooks

## Benefits for our Businesses and Non-Profits



Support customers that want to pay electronically with a card or bank account.



All payments received are deposited directly into the customer's bank account, not a third-party payment app.



Receive support directly from Autobooks, a trusted partner of **our financial institution.**

We've partnered with Autobooks to make it easy for businesses and non-profits to accept customer payments directly from online **and mobile banking.**

### Instructions:

Replaced the area highlighted in Yellow with your Financial Institution's name.

If your institution does not have a mobile integration with Autobooks, delete the area highlighted in blue.

Remove the highlighting from both before presenting the slide.

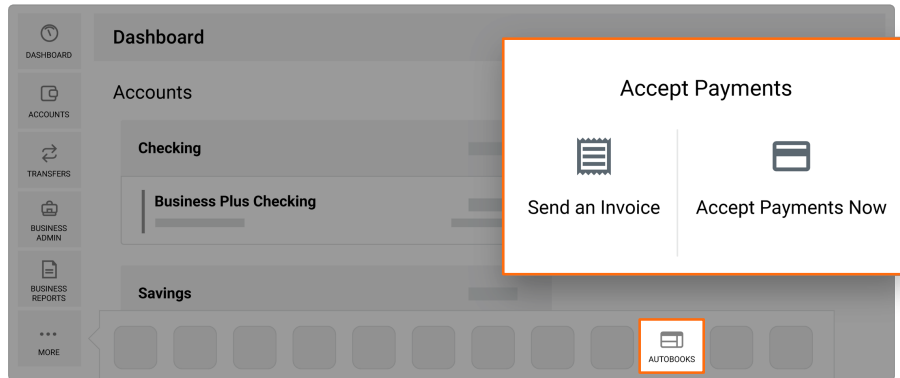
Read the screen as written!

**STOP**

**Partner: Alkami**

**Instructions for slides 5-10:** Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



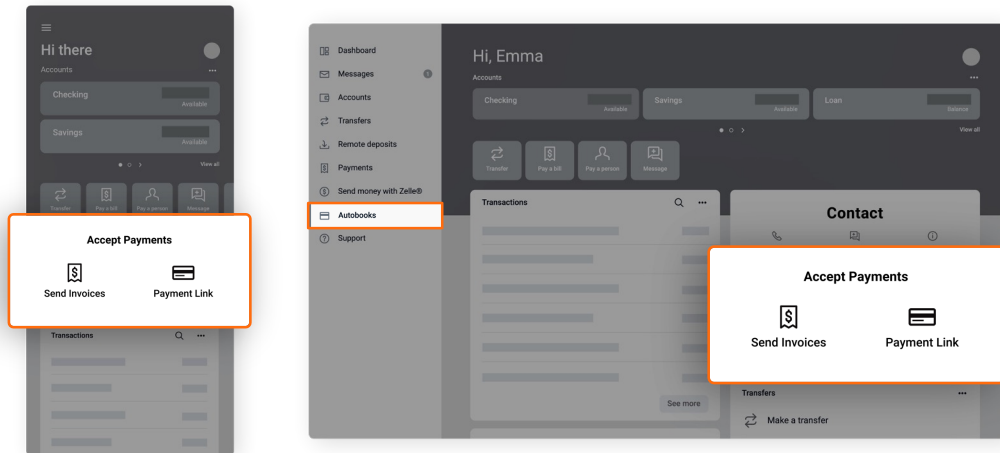


STOP

Partner: Banno

Instructions for slides 5-10: Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



6

FOR INTERNAL TRAINING USE ONLY

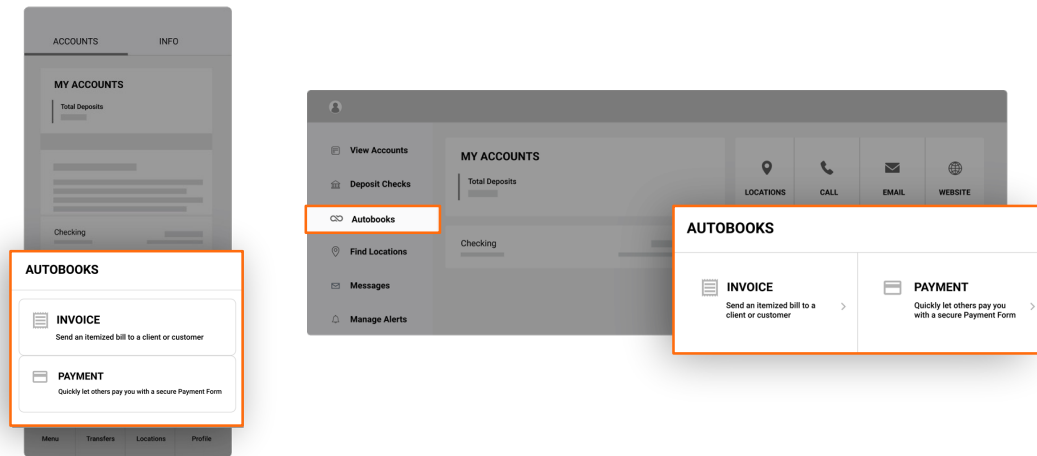
autobooks

STOP

Partner: CSI

Instructions for slides 5-10: Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



7

FOR INTERNAL TRAINING USE ONLY

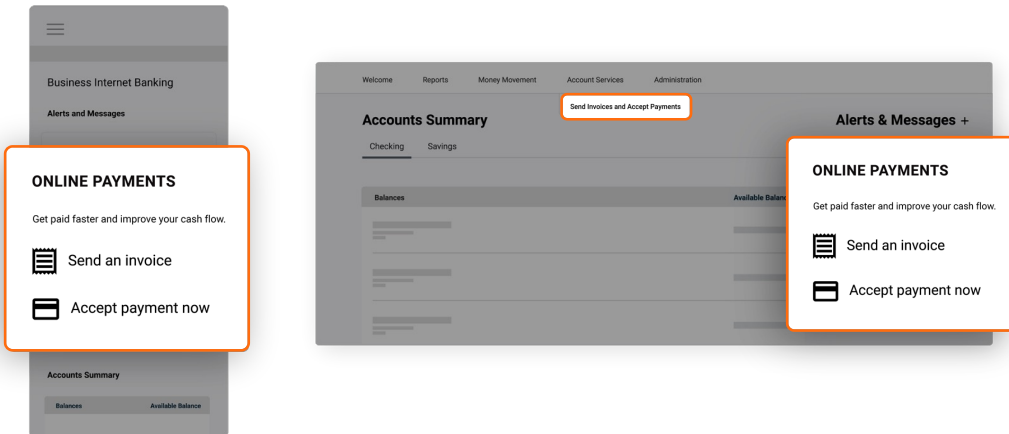
autobooks

STOP

Partner: FIS D1B

Instructions for slides 5-10: Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



8

FOR INTERNAL TRAINING USE ONLY

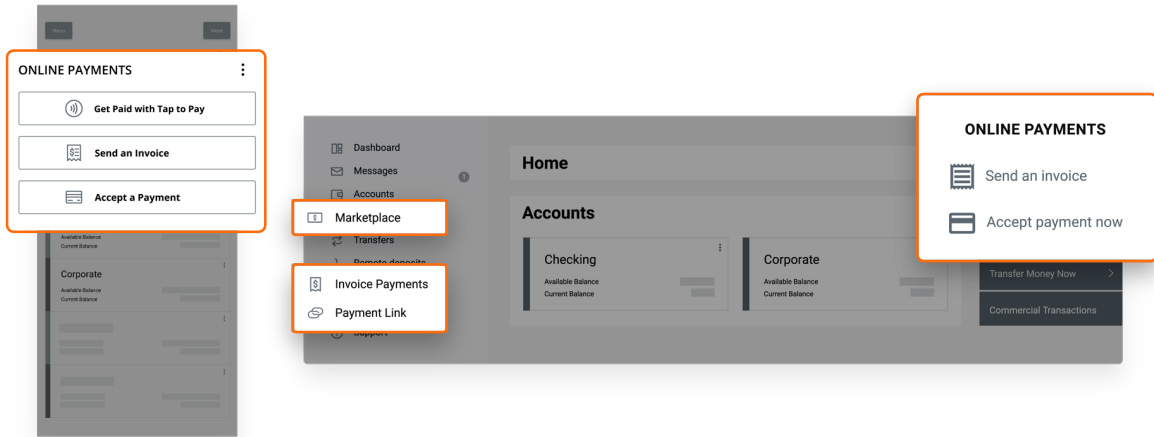
autobooks

STOP

## Partner: Q2 Marketplace and SDK

Instructions for slides 5-10: Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



9

FOR INTERNAL TRAINING USE ONLY

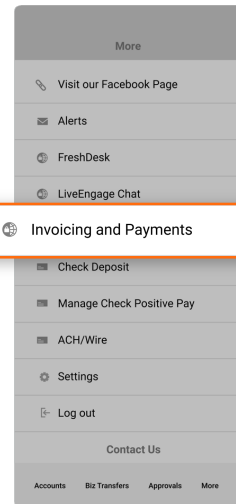
autobooks

STOP

Partner: NCR

Instructions for slides 5-10: Find your online banking provider, delete unused slides. Delete this note if using this slide.

We partnered with **Autobooks** to offer new **payment acceptance** features to our businesses, sole proprietors, and non-profits.



10

FOR INTERNAL TRAINING USE ONLY

autobooks

## Ways a business can accept customer payments

- Send a digital invoice
- Share a secure payment link
- Accept a payment directly in the app
- Display a QR code
- Accept cash and checks and reconcile with Autobooks

The illustration shows three overlapping screens from the Autobooks payment system. The top screen is an 'Invoice' for \$55.00, dated 02/24, with a 'Pay online' button. The middle screen is a 'Payment' form with fields for 'Payment amount', 'Payment schedule', and 'Payment Method' (Credit/Debit or Bank account), followed by a 'Submit payment' button. The bottom screen displays a QR code and the URL 'autobooks.co/pay/your-business-name'.

FOR INTERNAL TRAINING USE ONLY

autobooks

Read slide as-is.

## INVOICING

### How Invoicing Works

1

**The business sends an invoice.** They complete the basic fields on their invoice template inside online or mobile banking, then click send.

2

The invoice is delivered to their customer via email. **Customers click on a link from their email to view and pay the invoice.**

3

**They can pay using any major card**, including American Express®, or by ACH bank transfer. The business pays 3.49% per card transaction, and 1.00% per ACH transaction.

\*These are typical rates, but may vary based on the partnering financial institution. Please contact your bank or credit union to learn more.

4

Funds go directly into the business checking account and are usually deposited within two business days. **They're never tied up or held by another platform.**

Let's look at how Invoicing with Autobooks works:

First, the business will complete an invoice (either from online banking or mobile banking if available) and send it to their customer via email.

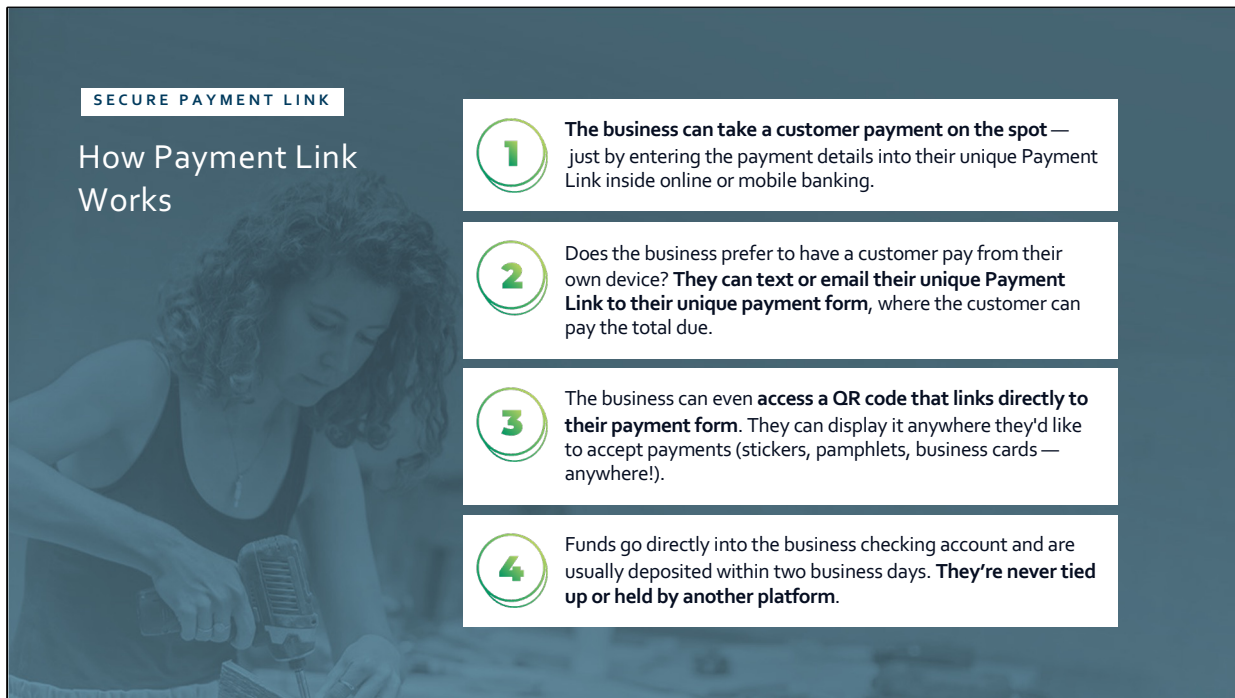
The invoice is delivered to the customer's inbox. The customer clicks a link to view and pay their invoice. The link takes the customer to a secure web browser.

The customer can pay the invoice using any major credit or debit card, or by a bank transfer (wherever the payor does their banking). The business is charged 3.49% of the transaction amount for card payments, and 1% of the transaction amount

for bank transfer/ACH transactions.

Payment funds are settled to the business' checking account usually within two business days. They aren't tied up in a virtual wallet or held by a third-party provider.





**SECURE PAYMENT LINK**

## How Payment Link Works

- 1** The business can take a customer payment on the spot — just by entering the payment details into their unique Payment Link inside online or mobile banking.
- 2** Does the business prefer to have a customer pay from their own device? **They can text or email their unique Payment Link to their unique payment form**, where the customer can pay the total due.
- 3** The business can even **access a QR code that links directly to their payment form**. They can display it anywhere they'd like to accept payments (stickers, pamphlets, business cards — anywhere!).
- 4** Funds go directly into the business checking account and are usually deposited within two business days. **They're never tied up or held by another platform.**

Let's look at how Payment Link with Autobooks works:

The business can take a payment right inside of online or mobile banking by clicking on the Payment Link feature, then completing a payment form in-app.

Each business is provided a unique Payment Link to share with customers too! This payment link can be shared via text, email or any way the business talks with their customers. The link leads to a unique payment form that can be customized by the business, and the payor can type in their payment details and amount.

The business is even provided with their own QR code that can

be saved or downloaded and shared via print materials, posted to websites, or to social media pages.

The business is charged 3.49% of the transaction amount for card payments, and 1% of the transaction amount for bank transfer/ACH transactions (same as Invoicing).

Payment funds are settled to the business' checking account usually within two business days. They aren't tied up in a virtual wallet or held by a third-party provider.

**STOP**

Delete this slide if your financial institution does not yet offer Tap to Pay

#### TAP TO PAY ON IPHONE

### How Tap to Pay on iPhone Works

1

The business will open their mobile banking app on their iPhone and **enable Tap to Pay on iPhone**.

2

The business **enters the amount to be paid**, then **presents the iPhone to their customer**.

3

The customer **holds their card horizontally at the top of the iPhone over the contactless symbol**, or holds their device near the top of the iPhone for Apple Pay and other digital wallet payments.

4

When the **"done"** checkmark appears, the transaction is complete.

Tap to Pay on iPhone requires a supported payment app and the latest version of iOS. Update to the latest version by going to Settings > General > Software Update. Tap Download and Install. Some contactless cards may not be accepted by your payment app. The Contactless Symbol is a trademark owned by and used with permission of EMVCO, LLC. Tap to Pay on iPhone is not available in all markets. View [Tap to Pay on iPhone countries and regions](#).

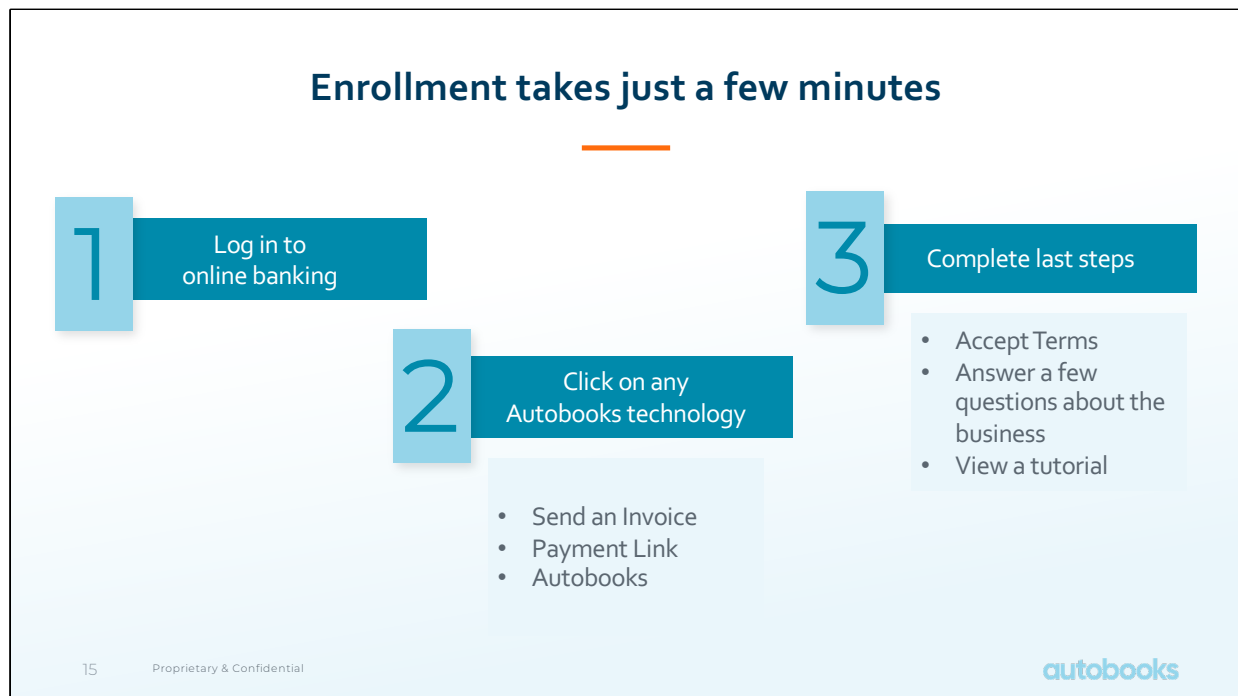
### How Tap to Pay on iPhone works:

The business will open their mobile banking app on their phone, then click the Tap to Pay button to enable the feature. They will enter the amount needed for payment, then present their iPhone to the paying customer or donor.

The payor holds their card to the top of the business iPhone (or holds their device with a virtual wallet enabled). Once a "Done" indicator appears, the transaction is complete.

Payments taken through Tap to Pay on iPhone are processed at a rate of 2.75% (bank transfer payments don't apply with Tap to Pay). Funds settle into the business checking account within two

business days.



Sign up is simple, and all steps are completed within minutes inside online banking:

- 1) Business owner (or primary account user) logs into online banking.
- 2) Clicks on any Autobooks technology (Invoicing or Payment Link).
- 3) The business will accept Autobooks terms and conditions, then answer a few basic questions about their business. They'll view a short user tutorial, and then enrollment is complete!

There is no contract to sign, and no required usage agreements. The customer can unenroll at any time.

## Autobooks Pricing

- Simple and easy to understand
- No hidden fees or additional use charges
- No contract to sign and no required use agreements

Tap to Pay, Send an Invoice,  
Payment Link

No Monthly Usage Fee

Full Autobooks  
(includes Accounting and Reporting)

\$9.99 / mo.

Tap to Pay  
Card Present Processing

2.75%

Card Not-Present  
Processing

3.49%

ACH (Bank Transfer)  
Processing

1.00%

16

FOR INTERNAL TRAINING USE ONLY

autobooks

Now let's talk about pricing!

- The customer pays no monthly subscription fee to use the basic tools of Tap to Pay, Send an Invoice and Payment Link.
- If the customer upgrades to add accounting and reporting features, they'll pay a monthly subscription fee of \$9.99 (that's cheaper than two fancy coffee drinks!)

Regardless of what tool the customer uses, they will pay processing fees to take in payments from their customers.

- When using Tap to Pay and a physical card is used, the processing rate is 2.75% of the total transaction. If the end customer is not able to use a physical card, the Card-Not-

Present rate will apply using the manual card entry option within Tap to Pay.

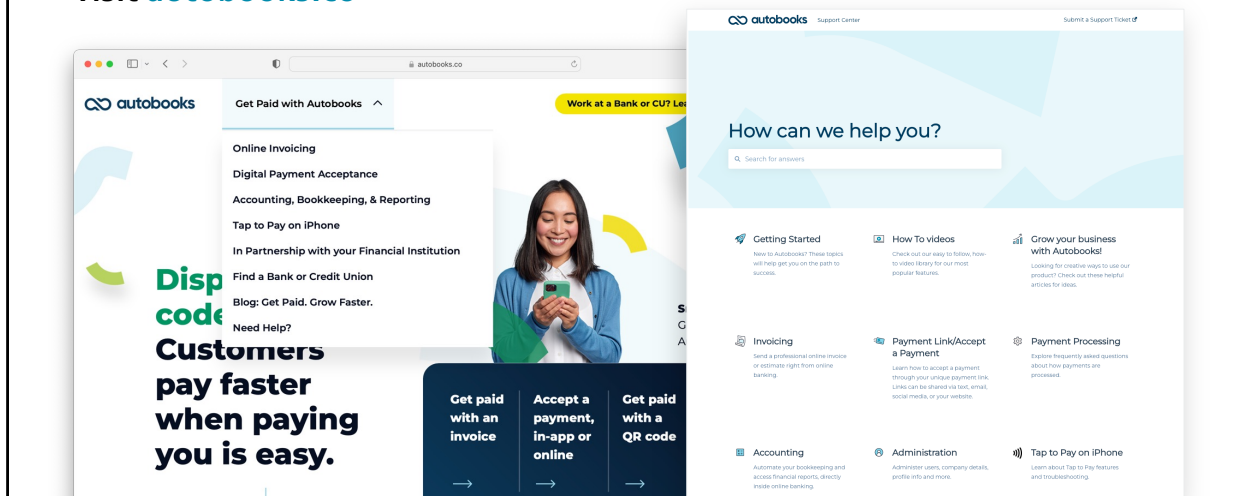
- For Send an Invoice and Payment Link, processing rates for credit/debit cards is 3.49% of the total transaction. Bank transfer payments (also known as ACH) are processed at a rate of 1% of the total transaction.

---

GO TO NEXT SLIDE.

If you ever have a question about Autobooks features, visit [autobooks.co](https://autobooks.co)

Have a detailed question? Visit our [knowledge base](https://help.autobooks.co) or [contact Autobooks directly](https://help.autobooks.co/contact-autobooks-support)



For more detailed information about our features, visit our websites:

General info: <https://autobooks.co>

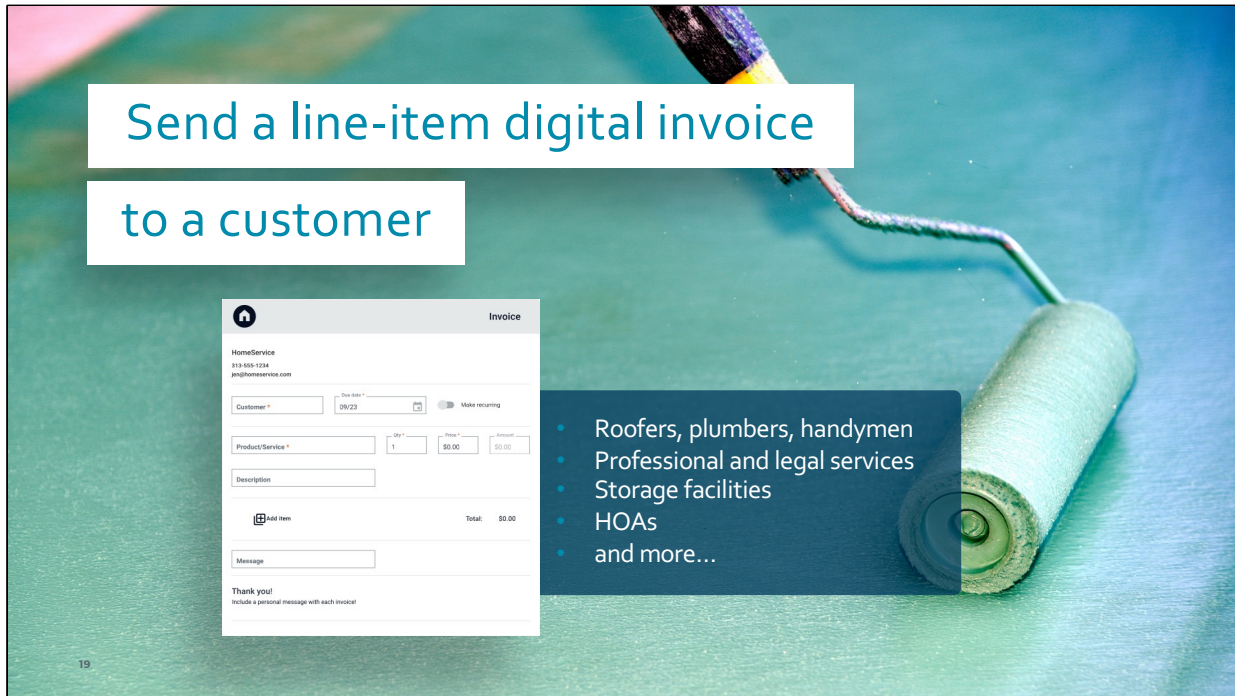
Detailed feature info: <https://help.autobooks.co>

Contact Autobooks Support: <https://help.autobooks.co/contact-autobooks-support>





Let's review different business types that work best for Autobook's various payment collection options.



## Send a line-item digital invoice to a customer

**Invoice**

HomeService  
313-555-1234  
jeng@homeservice.com

Customer \*  Due date \* 09/23 ☐ Make recurring

Product/Service *	Qty *	Price *	Amount
<input type="text"/>	1	\$0.00	\$0.00
Description <input type="text"/>			

Total: \$0.00

Message

Thank you!  
Include a personal message with each invoice!

- Roofers, plumbers, handymen
- Professional and legal services
- Storage facilities
- HOAs
- and more...

Invoicing is great for businesses that need to send their client a bill or an invoice. When the client pays the invoice digitally, the status is updated to Paid automatically...no need to track payments manually on a spreadsheet.

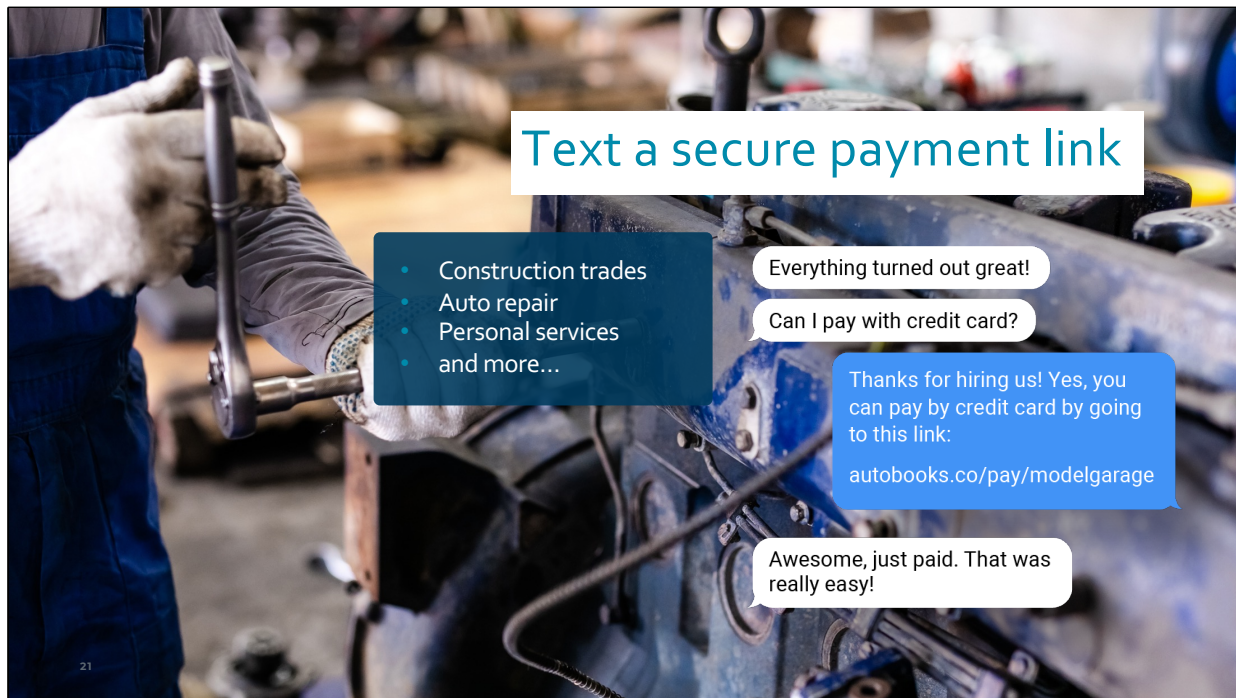
Types of businesses that are a good fit include roofers, plumbers, and handymen...really all skilled trades. Professional consulting services and legal services, as well as storage facilities all use Autobooks invoicing. There are even Homeowners associations that use the recurring invoice feature to bill members for monthly dues!

What types of customers have you talked to that might be a good fit for invoicing?



QR codes are great for businesses that take payments at retail spaces and events! The business just displays their QR code at their booth, and payors can scan it to complete a short payment form.

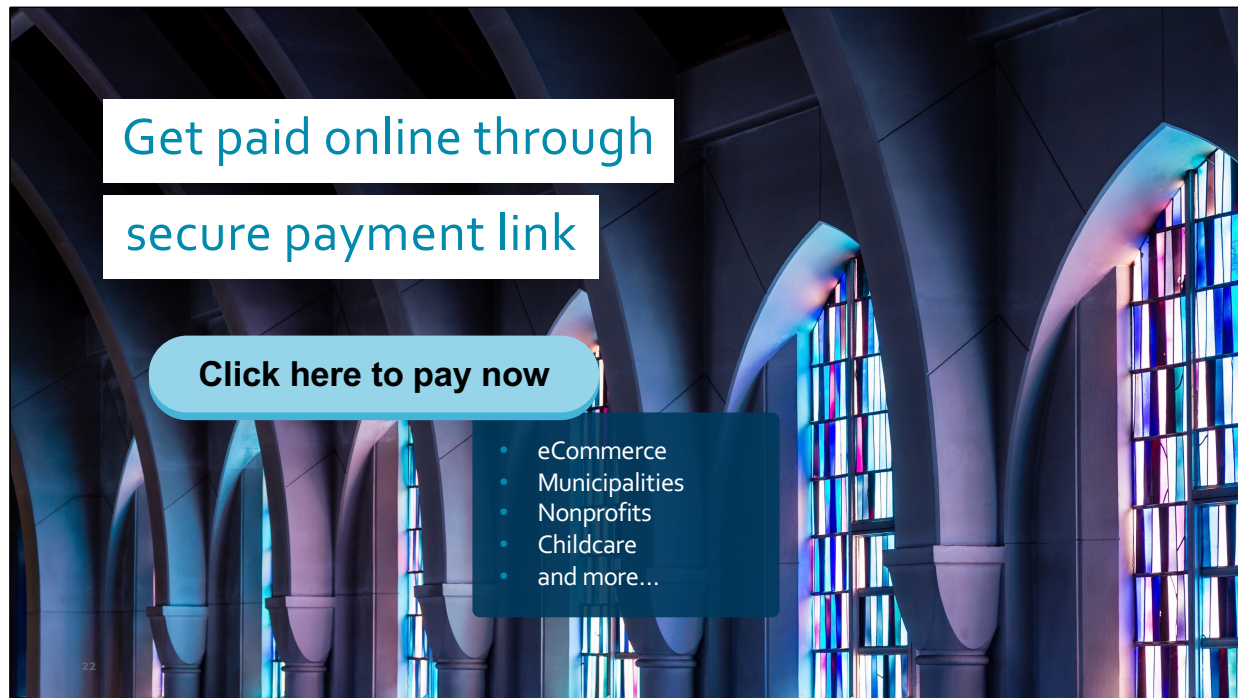
Non-profits love this feature too! The QR code can be printed on flyers, made into stickers, or even saved on volunteer's smart phones as an image to collect donations whenever they need.



The payment link can also be texted to a client by the business. This is great for businesses that meet customers in their home, or need to collect money before completing a bill of sale. Many construction trades, repair shops, and more can use this texting capability.

The client simply clicks the link in the text message, and the business' payment form appears in a secure browser on the client's smartphone.





Businesses can also post their unique Payment Link on their website, within an email, or on their social media pages. Once payors click the link, the secure payment form appears in a web browser to complete their payment (or donation).



Tap to Pay is great for businesses that accept payments face-to-face with customers. Food trucks, farmers market and craft fair sellers, and more. It's a great way to collect card payments on the go, and funds are deposited w/in two business days directly to the business checking account.

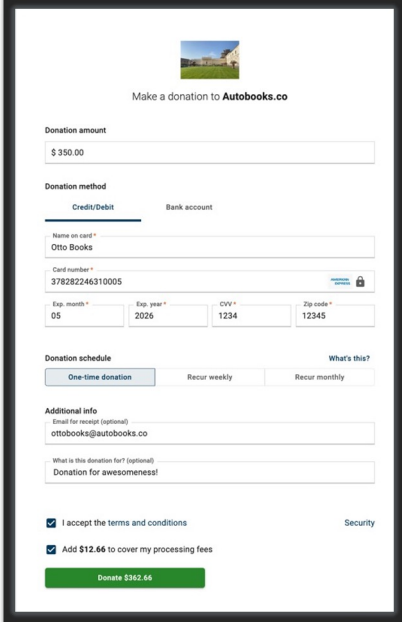


Let's take a look at what new features Autobooks has to offer!

## Payment Link: Donors can cover processing fees

- Non-profits use the Payment Link to take donations via credit card, debit card, or bank transfer.
- The donation form now allows donors to increase their donation amount to cover processing fees for digital payments.

[Learn more](#) →



The screenshot shows a donation form for Autobooks.co. At the top, it says "Make a donation to Autobooks.co". The "Donation amount" is set to "\$ 350.00". Under "Donation method", "Credit/Debit" is selected. The form includes fields for "Name on card" (Otto Books), "Card number" (378282246310005), "Exp. month" (05), "Exp. year" (2026), "CVV" (1234), and "Zip code" (12345). There are tabs for "One-time donation", "Recur weekly", and "Recur monthly". Under "Additional info", there's a field for "Email for receipt (optional)" with "ottobooks@autobooks.co" and a field for "What is this donation for? (optional)" with "Donation for awesomeness!". At the bottom, there are two checkboxes: "I accept the terms and conditions" and "Add \$12.66 to cover my processing fees". A green "Donate \$362.66" button is at the bottom right. A "Security" icon is also visible.

25

FOR INTERNAL TRAINING USE ONLY

autobooks

Businesses have asked Autobooks for a way to account for processing/transaction fees for taking digital payments...and they listened! The Product Pricing tool helps the business adjust the price of their product to cover the cost of potential processing fees by doing the math for them.



## Online Payment Form enhancements

- New redesign makes it simpler for customers to submit payments, helping small businesses and non-profits to get paid faster

[Learn more](#) →

The screenshot displays a payment form for 'Green Belle Lawn Care' with a total amount of \$38.00. The form includes sections for 'Payment method' (Credit/Debit and Bank account), 'Payment schedule' (One-time payment, Recur weekly, Recur monthly), and 'Additional info' (Email for receipt, What is this payment for?). A checkbox for 'I accept the terms and conditions' is checked, and a 'Pay \$0.00' button is visible at the bottom.

Make a payment to **Green Belle Lawn Care**

**\$38.00**

Payment method

Credit/Debit Bank account

Name on card \*  
Otto Books

Card number \*  
5555555555555555

Exp. month \* 02 Exp. year \* 2027 CVV \* 364 Zip code \* 91502

Payment schedule What's this?

One-time payment Recur weekly Recur monthly

Additional info

Email for receipt (optional)  
otto.books@gmail.com

What is this payment for? (optional)  
Payment for weekly lawn trim. Great job!

☒ I accept the terms and conditions Security

Pay \$0.00

26

FOR INTERNAL TRAINING USE ONLY

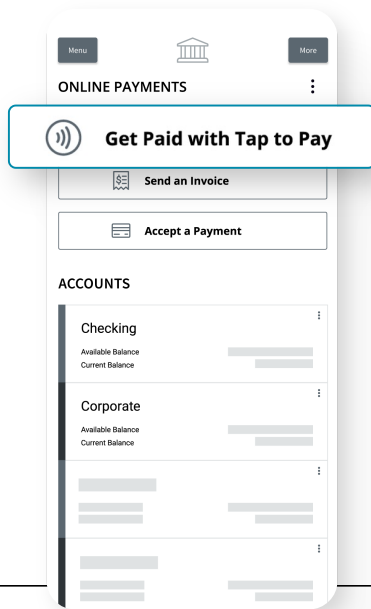
autobooks

The Autobooks payment form template just got easier for payors and donors to complete. Autobooks has streamlined the amount of fields to complete, but they've still kept the favorites like letting the payor choose to set up a recurring payment to the business (or a recurring donation to the non-profit).

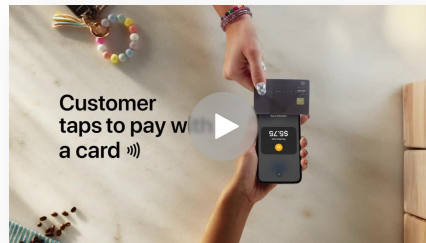
**STOP**

Delete this slide if your financial institution does not yet offer Tap to Pay

## Tap to Pay on iPhone



**NOW AVAILABLE!**



autobooks

Tap to Pay is the latest payment technology that Autobooks has to offer! Now your business customers can use their smart phone as a way to collect credit card payments on the go. It's a new feature right in online banking.

# Autobooks Hub Updates

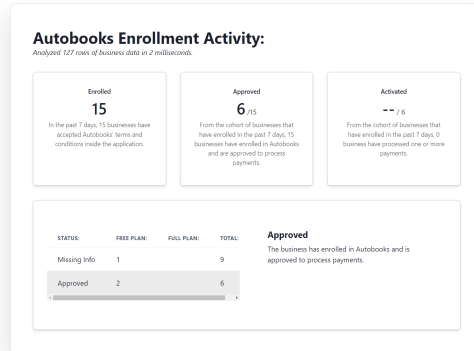
---

autobooks

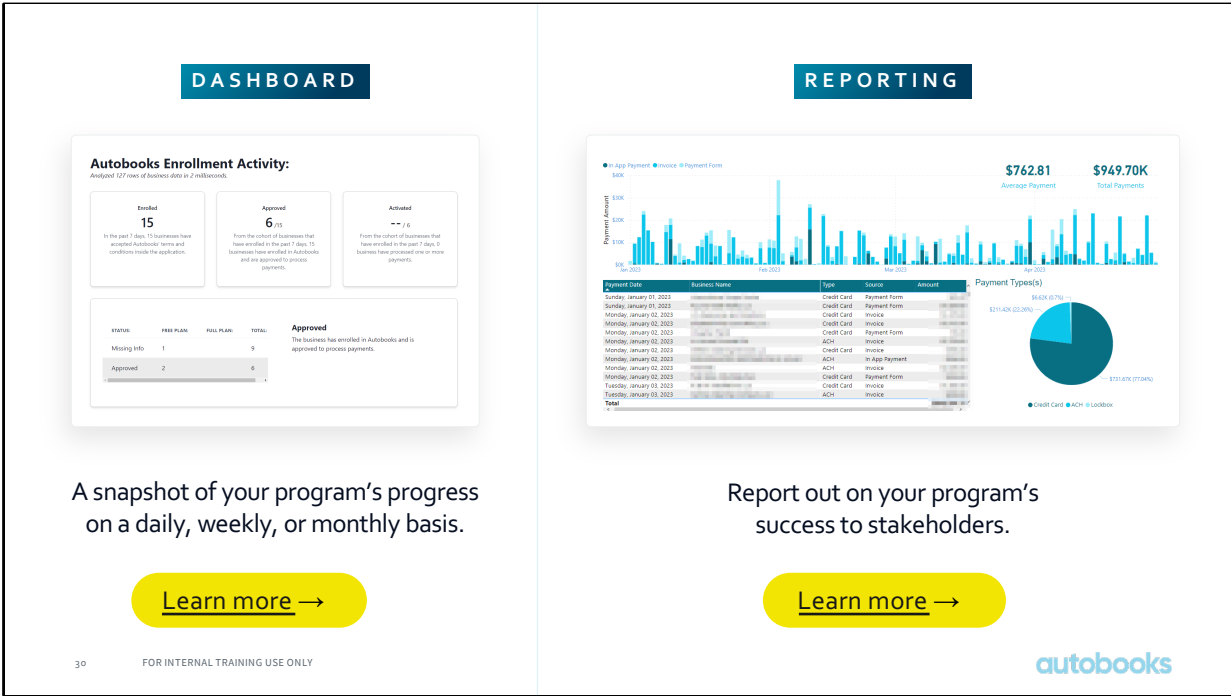
# The Autobooks Hub

Your back office and admin portal for your Autobooks program.

[Learn more](#) →



The Autobooks Hub is a website provided by Autobooks, where we can check the latest activity for our Autobooks program.



## Need Help Supporting Customers?

### GET HELP

Create a new ticket in the Autobooks Hub:

Subject: \*

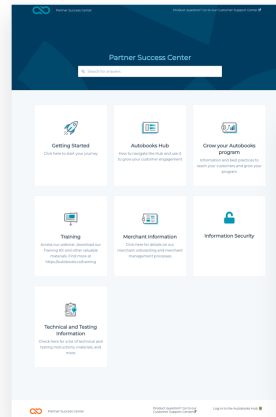
Description: \*

Category: \*

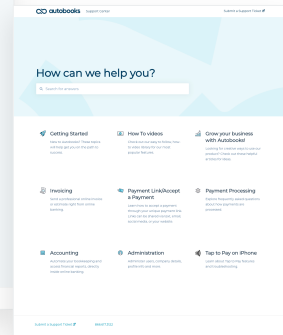
General Inquiry

Save

### KNOWLEDGE BASE



Partner Success Center →  
Customer Support Center →



31

FOR INTERNAL TRAINING USE ONLY

autobooks

You can also submit a help ticket right from the Hub...either with a question for yourself, or a request to help your customer. For more information about the Hub, please visit our Partner Success Center at <https://banking-help.autobooks.co>

# Connect with Autobooks

[autobooks.co](https://autobooks.co)

**Email:** [FISuccess@autobooks.co](mailto: FISuccess@autobooks.co)

FOR INTERNAL TRAINING USE ONLY

**autobooks**