

Q2 Discover + Autobooks

Using Your Q2 Digital Channel to Drive Autobooks Activation



THE OPPORTUNITY

Your institution isn't just where your business customers bank — it's where they run their business

Why in-app engagement works

- A business owner checking their balance or paying a bill is already in a doing mindset. That's the moment to show them they can accept payments, send invoices, and get paid — without leaving for a third-party app.
- Q2 gives your institution the infrastructure to deliver that message while your business customers are active inside their accounts.

Why Autobooks specifically

- Autobooks lives inside online banking — which means a business owner can go from learning about it to enrolling without ever leaving their account.
- Every payment they accept through Autobooks deposits directly into their checking account, not a third-party payment app.

STEP ONE

Add Accept Business Payments to Your Navigation Landing Page

Why it matters

A business owner navigating to a page of financial actions is already in a doing mindset. Seeing Autobooks alongside tools like Transfer Money and Pay a Loan positions it as part of their financial toolkit.

How to set it up

- 1 Use Q2 Experience Builder or submit a ticket to Q2 support to request the tile be added to your navigation landing page.
- 2 The tile should point to the enrollment experience for Autobooks.
- 3 Once the tile is live, add an icon to match the visual treatment of your other tiles — your Q2 team can advise.

Note: The tooltip badge on the tile is deployed separately through Q2 Discover — covered in the next section.

STEP ONE

Add Accept Business Payments to Your Navigation Landing Page

The screenshot shows the Thrive Business Banking interface. At the top, the Thrive logo is on the left, and the user's name 'Good Morning, Mike Hayes' is on the right. Below the logo is a navigation menu with 'Home', 'Transfers and Payments' (highlighted), 'Business Banking', 'Services', 'Settings', 'Messages', 'My Toolkit', 'Branches & ATMs', and 'Log Off'. The main heading is 'Transfers and Payments'. Below this is a search bar labeled 'Search Page'. The content is organized into sections: 'TRANSFERS AND PAYMENTS' and 'SEND MONEY'. Under 'TRANSFERS AND PAYMENTS', there are four cards: 'Transfer Money', 'Accept Business Payments' (highlighted with a red box), 'Pay a Loan', and 'Pay with Bill Pay'. Under 'SEND MONEY', there are three cards: 'Zelle', 'Account to Account Transfer', and 'Neural Payments'. The 'Accept Business Payments' card includes an icon of a building with a dollar sign and the text: 'Accept Business Payments. Send invoices and accept card, ACH, and digital wallet payments from your online and mobile banking.'

STEP TWO

Deploy Discover Guides to Drive Activation

The navigation landing page puts Autobooks in front of your business customers.

Discover guides take that further — they actively introduce Autobooks, explain what it does, and move a business owner toward enrollment, all without them ever leaving their bank account.

These guides are designed to answer one question for your business customers: **Can I get paid directly through my bank account?**

GETTING STARTED

How to Get Your Discover Guides Set Up

Discover guides are built and deployed by the Q2 team inside your institution's Discover account.

Here's what the process looks like:

- 1 Choose from the available pre-built Discover guides you want to utilize or create your own.
- 2 Email InnovationStudio-Adoption@q2.com to request the pre-built Discover guides be added into your environment.
- 3 Customize guides to fit your brand and theme. Create a segment to target your guides via Q2 smart logic, or a custom segment.
- 4 Guides go live — no ongoing maintenance required. Once active, guides are always-on. A business owner who isn't ready the first time may act on it two or three logins later.

THE EXPERIENCE (1 OF 3)

Awareness

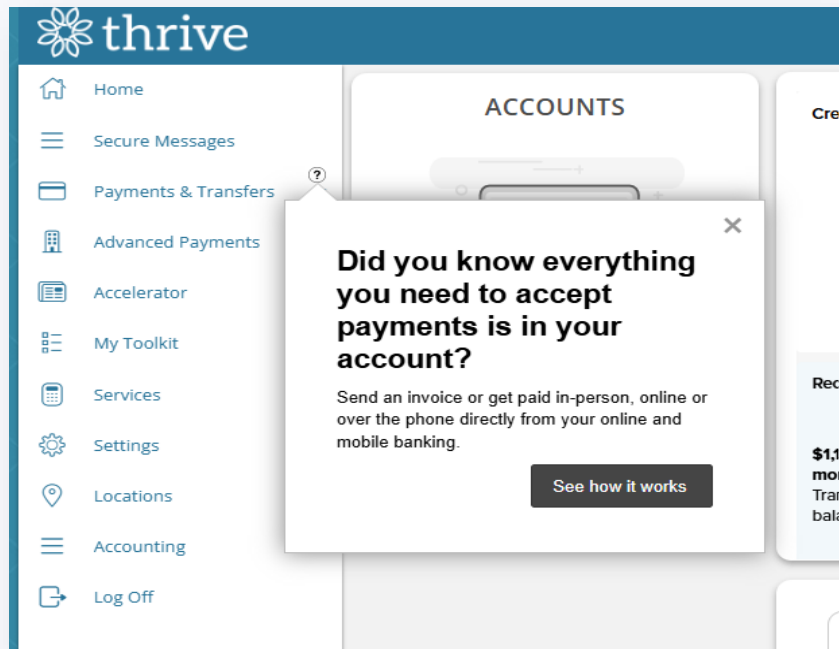
What the Business Owner Sees

The tooltip on the nav landing page tile, anchored to a deposit line item in the account view, or the dashboard announcement card surfaces Autobooks in context — without interrupting what the business owner came to do.

FORMATS

Tooltip — Badge on nav landing page tile or deposit line item. Hover or click to reveal.

Announcement Card — Non-blocking bottom-right card on the dashboard. Persists until dismissed.



THE EXPERIENCE (2 OF 3)

Understanding

What Happens Next

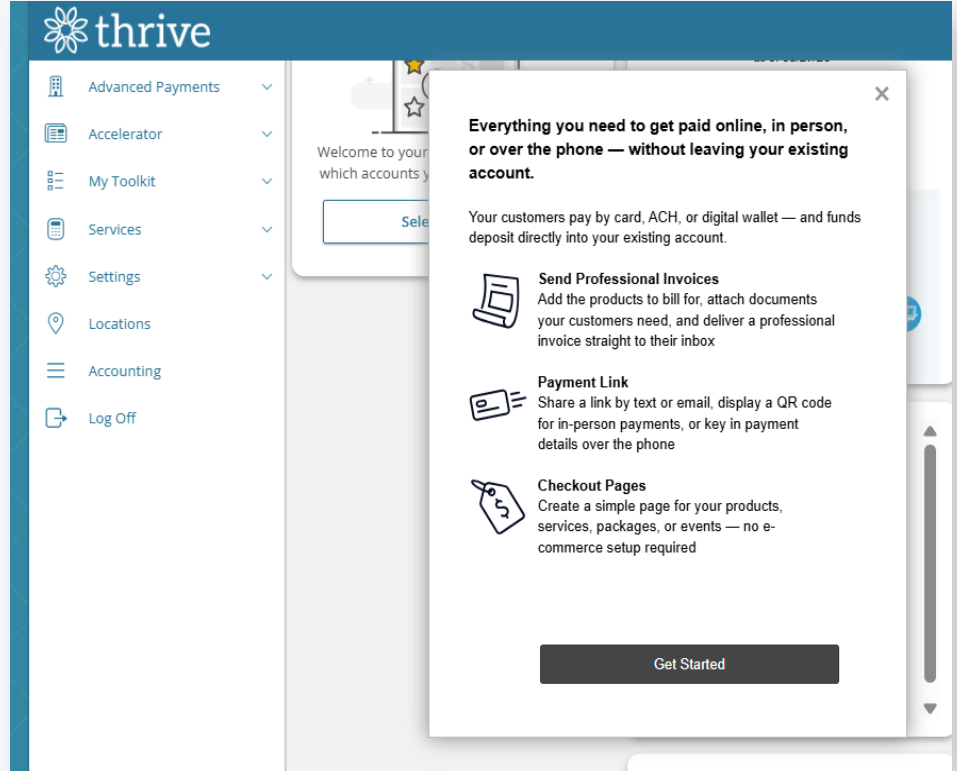
A business owner who engages has self-selected into wanting more. The lightbox experience shows them what Autobooks does and how it works.

The guides introduce the core tools: Invoicing, Payment Link, Checkout Pages, and for eligible institutions, Tap to Pay on iPhone.

GUIDE FORMATS

Single Slide — Quick overview of all tools. Best for dashboard card trigger or micro business segment.

Multi-Step Guide — One slide per tool with embedded video. Best for medium business segment or deeper engagement.



The screenshot displays the Thrive dashboard interface. On the left is a navigation sidebar with the following items: Advanced Payments, Accelerator, My Toolkit, Services, Settings, Locations, Accounting, and Log Off. The main content area features a lightbox guide titled "Everything you need to get paid online, in person, or over the phone — without leaving your existing account." The guide includes the following sections:

- Send Professional Invoices**: Add the products to bill for, attach documents your customers need, and deliver a professional invoice straight to their inbox.
- Payment Link**: Share a link by text or email, display a QR code for in-person payments, or key in payment details over the phone.
- Checkout Pages**: Create a simple page for your products, services, packages, or events — no e-commerce setup required.

A "Get Started" button is located at the bottom of the lightbox. In the background, a partial welcome message is visible: "Welcome to your... which accounts y...".

THE EXPERIENCE (3 OF 3)

Action

The Full Journey

The Get Started CTA connects directly to the Autobooks enrollment flow. By the time a business owner clicks it, Autobooks isn't a cold ask — it's something they've already started to understand on their own terms.

A business owner who enrolls having already seen what Autobooks does converts differently than one who encounters it cold.

Awareness → Understanding → Enrollment

THE GOAL




Make sure that by the time a business owner reaches the enrollment flow, it's not their first time hearing about it.

×

You're almost ready to get paid!

Complete your business profile in a few minutes. You'll be asked to provide contact details and business structure information.

Once your business is approved, you'll be able to:

-  Sell products, service, events, memberships, and more online with **Checkout Pages**.
-  Set your business up for success with a simple and trackable way to **send invoices and get paid online**.
-  Accept card or ACH payments any time with your **Payment Link**.

Accept Online ACH payments for 1%, online credit card payments for 3.49%. Payments are deposited into your bank account within two business days.

[Skip for now](#) [Get Started](#)

SEGMENTATION

Ways to Segment Your Users for Discover Guides

1. Everyone with Autobooks access

Recommended starting point

No complex segmentation required. The announcement card or tooltip opens into the single-slide lightbox for all eligible users.

2. Segment by business size or other traits

Next level

Use Q2 Smart traits to split by business type. Micro businesses get the single-slide overview. Medium businesses get the full multi-step walkthrough. Both run simultaneously, targeting different groups.

Appendix:
Additional Guide
Creation Steps

TABLE OF
CONTENTS

**Additional Guide
Creation Steps**

Navigation Landing Page
setup and guide options **13-20**

Dashboard announcement
guide options **21-27**

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Section 1

Two Choices:

1 **Badge with Tooltip, 2-Step Guide.**

Perfect for a one size fits all approach, or for small and micro businesses

2 **Badge with Tooltip, Comprehensive 6-Step Guide**

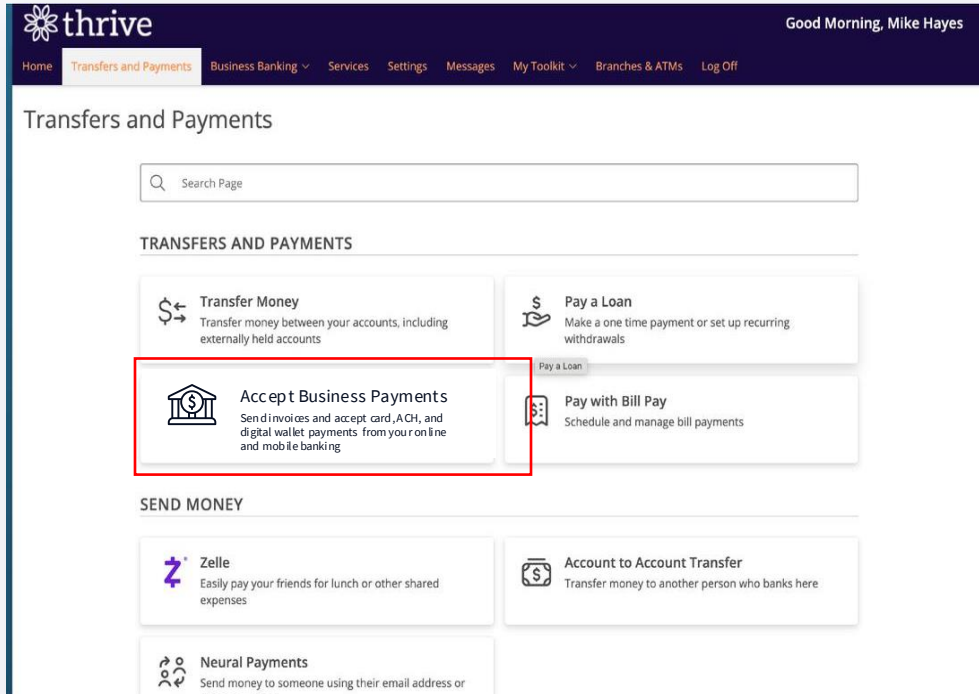
Use to provide an in-depth breakdown of all Autobooks payment tools

For FIs without NLP:

This series of Guides could be anchored to Left Hand Navigation or on Account page

STEP ONE

Navigation Landing Page



Illustrative of what the entry copy could say. Actual placement and configuration within Q2 would need to be built by the FI.

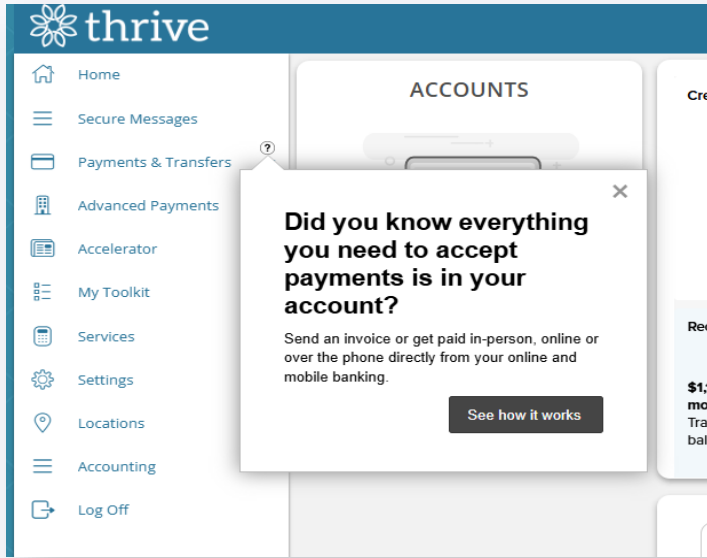
To create Tile on NLP

Utilize Q2 Experience Builder to create Tile or input ticket to Q2 Support

Two-Step Guide Experience

SECTION 1

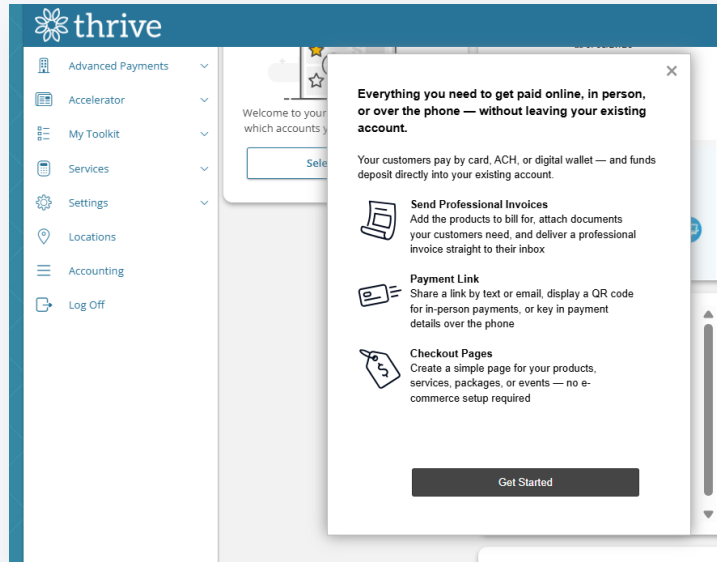
Navigation Landing Page | 2-Step Guide



Activation: ? Badge anchored to element – NLP Tile

Tooltip: Appears on Hover of Badge

Tooltip Action Button: Clicks to Step 2



Step 2 Action Button: Clicks to Autobooks Enrollment Page

Segment: All groups with Autobooks access

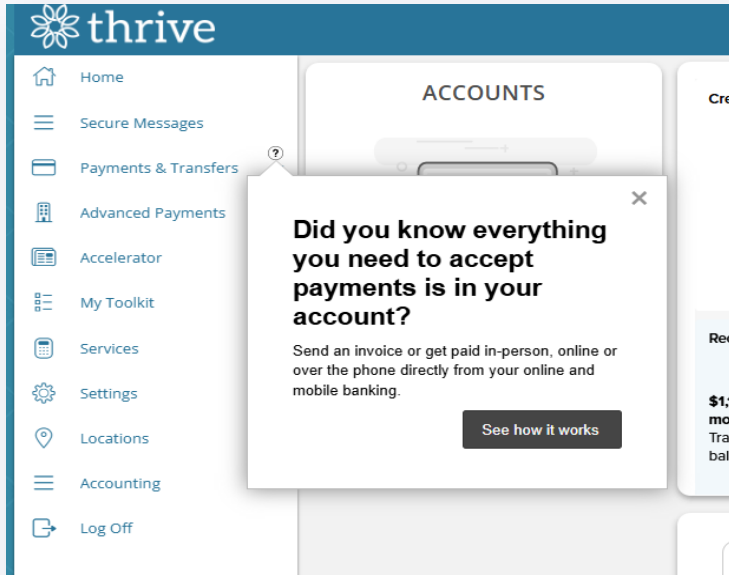
Scheduling: Always on

Device Type: Desktop or Tablet

Comprehensive Guide Experience

SECTION 1

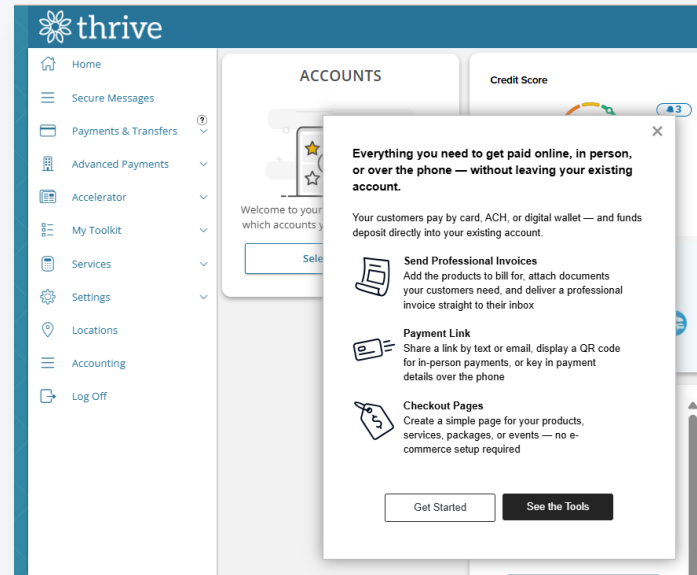
Navigation Landing Page | 6-Step Guide



Activation: ? Badge anchored to element – NLP Tile

Tooltip: Appears on Hover of Badge

Tooltip Action Button: Clicks to Step 2



Step 2 Action Buttons: Get Started clicks to Autobooks enrollment, See The Tools clicks to next step

Segment: All groups with Autobooks access

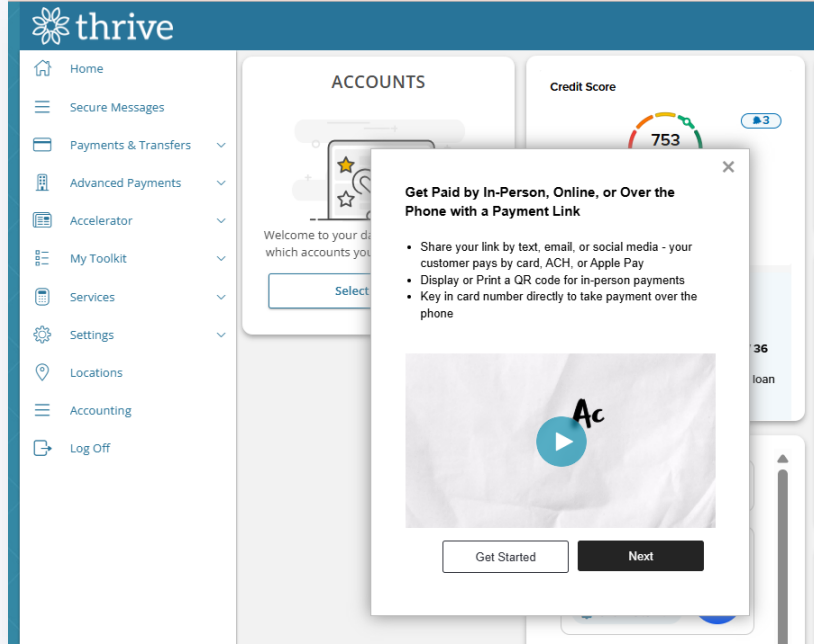
Scheduling: Always on

Device Type: Desktop or Tablet

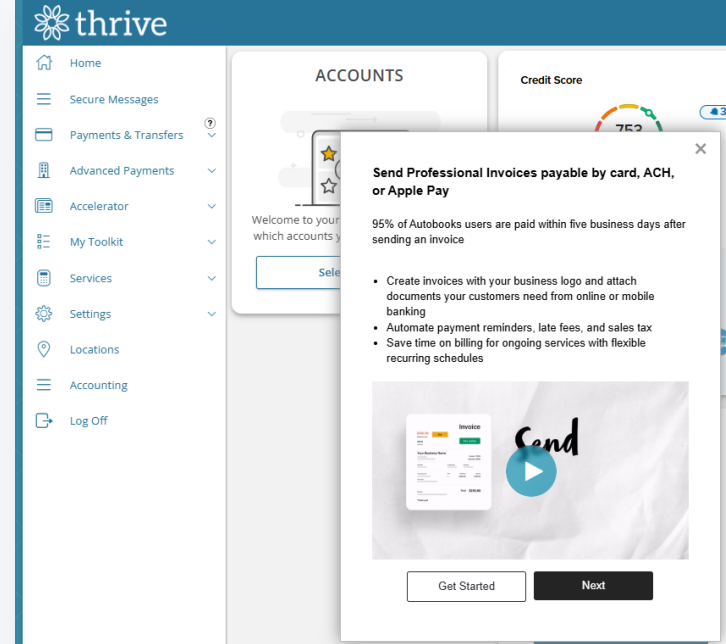
Illustrative purposes on Left Hand Navigation – but would be anchored to NLP Accept Business Payments Tile

SECTION 1

Navigation Landing Page | 6-Step Guide



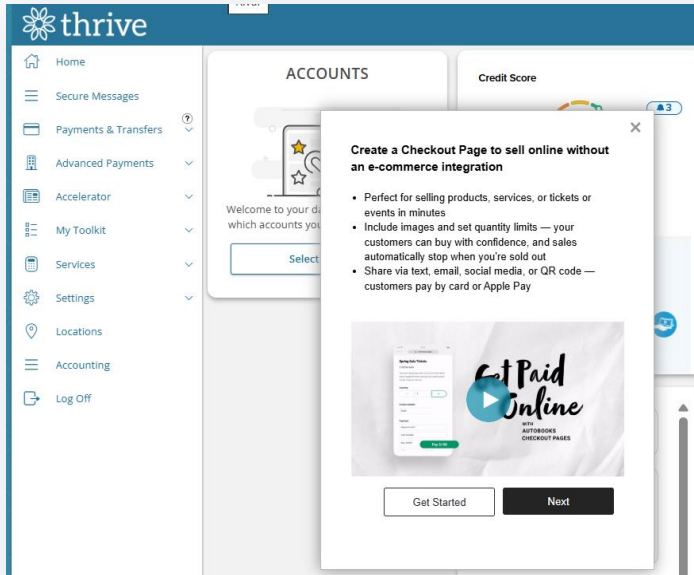
Step 3 Action Buttons: Get Started or Next



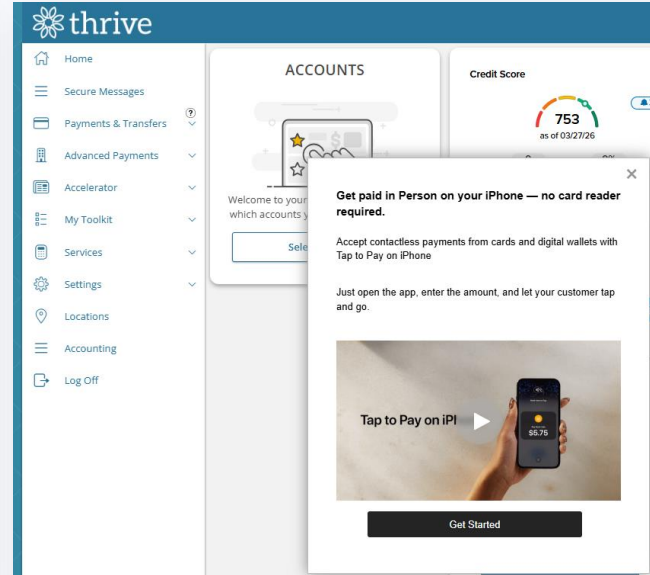
Step 4 Action Buttons: Get Started or Next

SECTION 1

Navigation Landing Page | 6-Step Guide



Step 5: Get Started or Next



Step 6 Optional: For FIs with Tap to Pay

Step 6 Action Button: Get Started clicks to Autobooks Enrollment page
Should you opt out of Step 6, Step 5 will need to be updated with single button Get Started to click to Autobooks Enrollment page

Section 02: Dashboard Announcement Guide

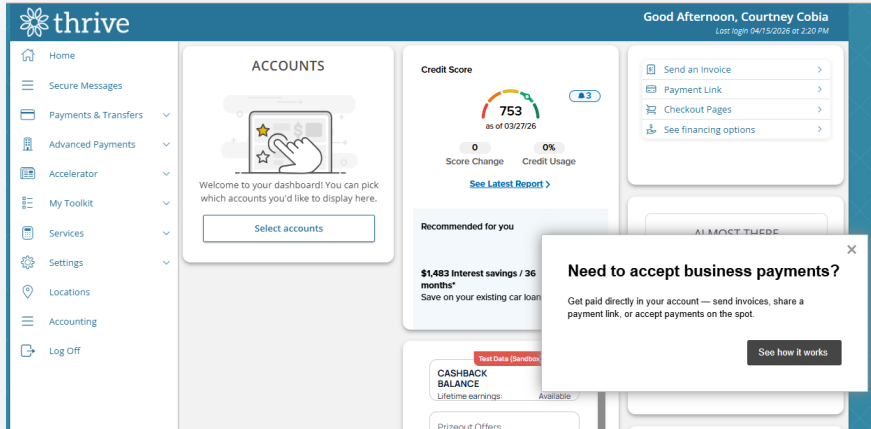
Two Choices:

- 1 Dashboard Guide with 2-Step Guide**
Perfect for a one size fits all approach,
or for small and micro businesses
- 2 Dashboard Guide with
Comprehensive 6-Step Guide**
Use to provide an in-depth breakdown
of all Autobooks payment tools

Two-Step Guide Experience

SECTION 2

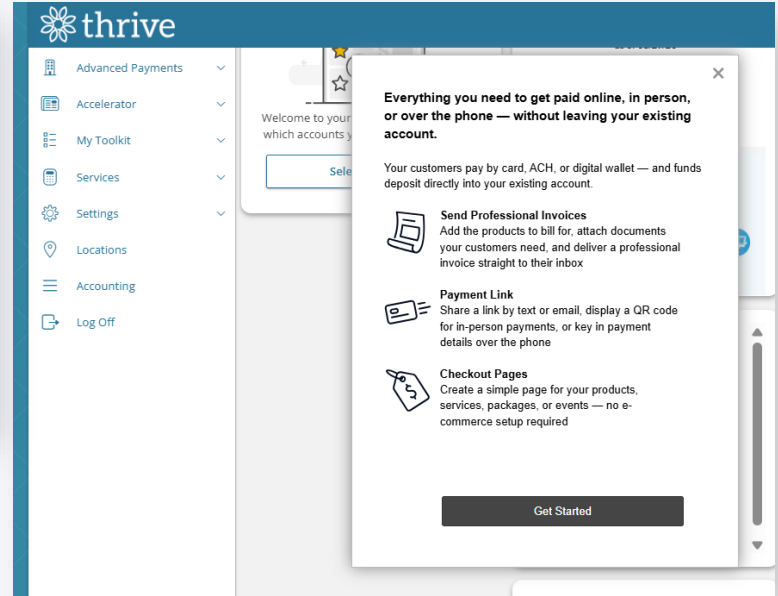
Dashboard Guide | 2-Step Guide



Activation: Automatic, no Backdrop

Location: Center Right

Action Button: Clicks to Step 2



Step 2 Action Button: Clicks to Autobooks Enrollment Page

Segment: All groups with Autobooks access

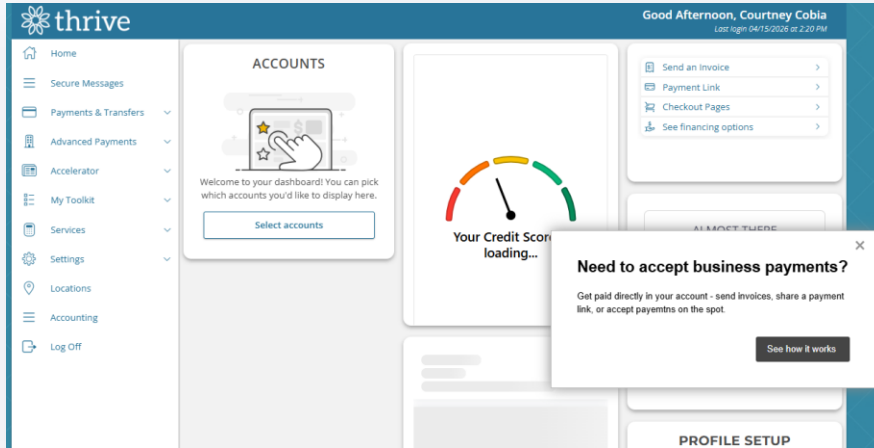
Scheduling: Custom Interval

Device Type: Desktop or Tablet

Comprehensive Guide Experience

SECTION 2

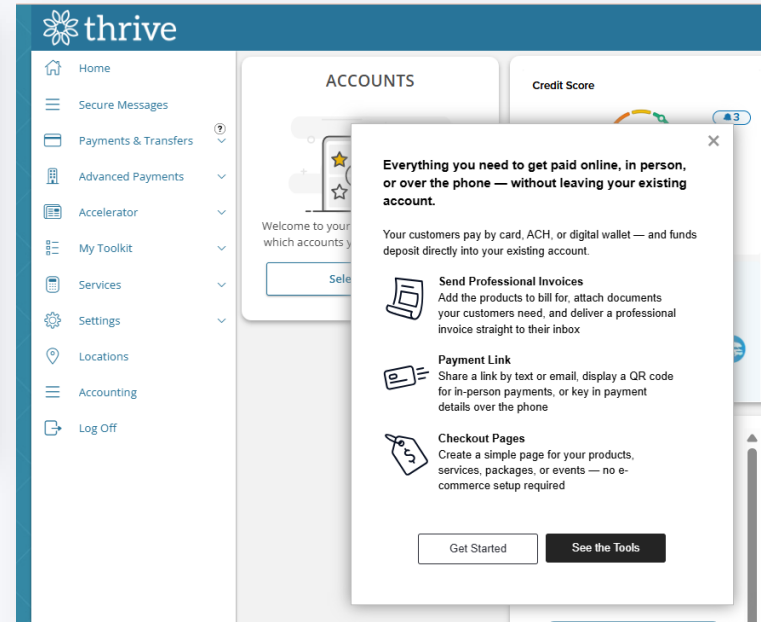
Dashboard Guide | 6-Step Guide



Activation: Automatic, no Backdrop

Location: Center Right

Action Button: Clicks to Step 2



Step 2 Action Buttons: Get Started clicks to Autobooks enrollment, See The Tools clicks to next step

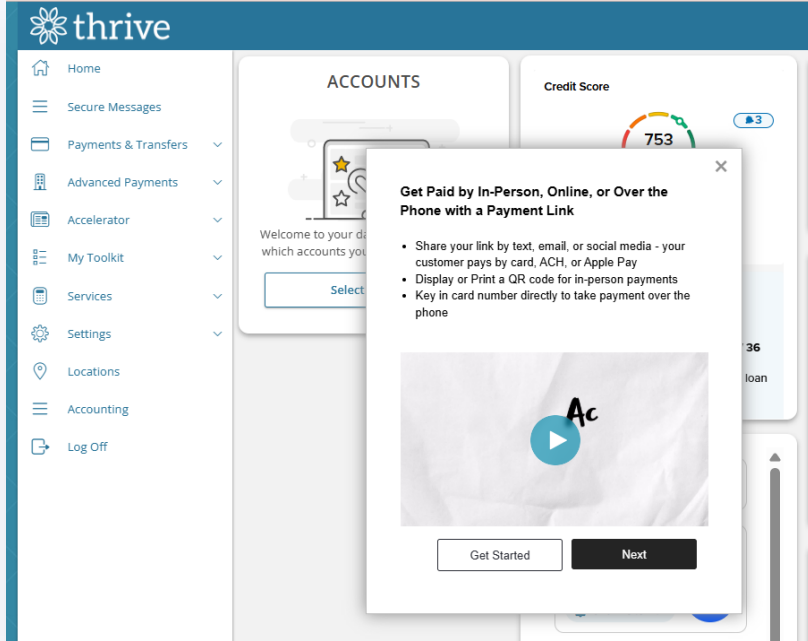
Segment: All groups with Autobooks access

Scheduling: Custom Interval

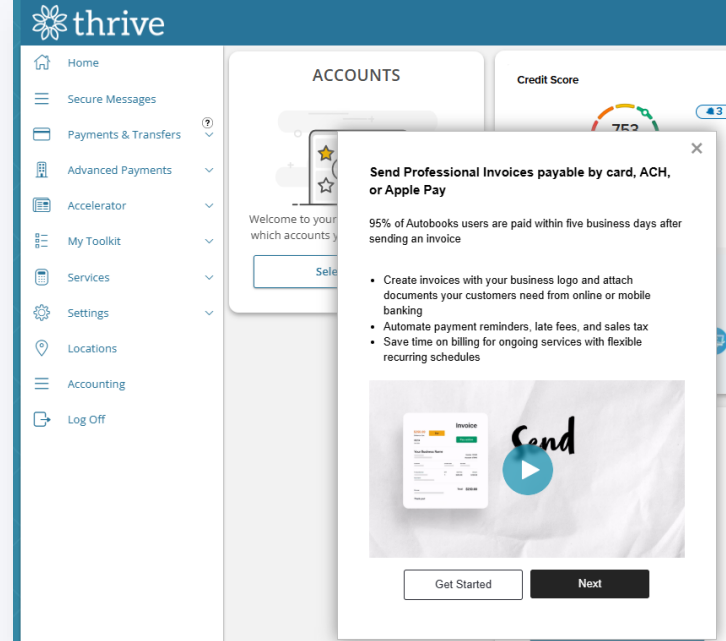
Device Type: Desktop or Tablet

SECTION 2

Dashboard Guide | 6-Step Guide



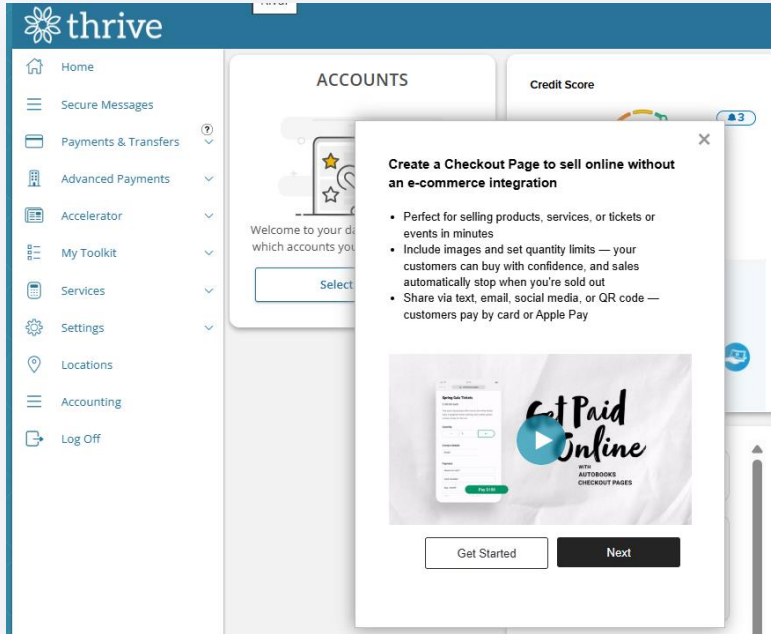
Step 3 Action Buttons: Get Started or Next



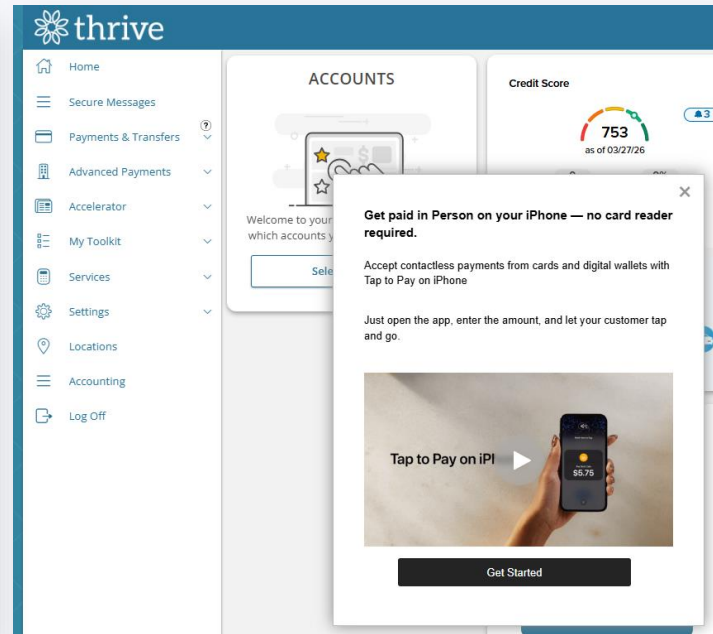
Step 4 Action Buttons: Get Started or Next

SECTION 2

Dashboard Guide | 6-Step Guide



Step 5: Get Started or Next



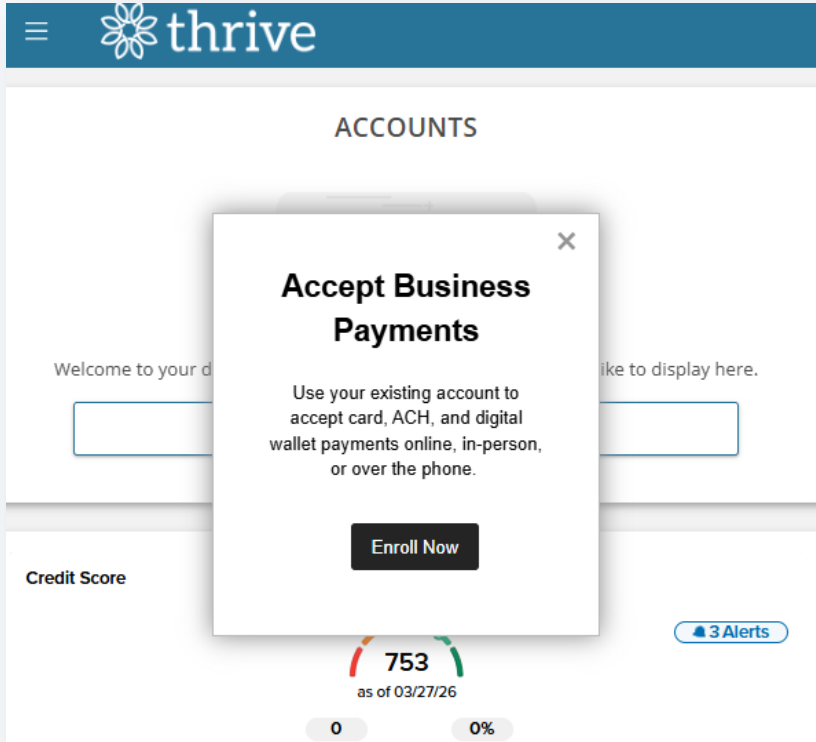
Step 6 Optional: For FIs with Tap to Pay

Step 6 Action Button: Get Started clicks to Autobooks Enrollment page
Should you opt out of Step 6, Step 5 will need to be updated with single button Get Started to click to Autobooks Enrollment page

Mobile Guide

SECTION 5

Mobile Guide



Activation: Automatic

Action Button: Clicks to Autobooks Enrollment Page

Segment: All groups with Autobooks access

Scheduling: Schedule to show 1x during window of time

Device Type: On Activation – change to Mobile Only after finalized customization

Thank You!

Let's connect:

Ready to get started? Reach out to your Q2 team to get these guides built out inside your Discover account.