



## How to Enroll in Autobooks:

A Step-By-Step Guide

It's easy to get started with Autobooks! Just follow the steps below to enroll in minutes and receive your first customer payment.

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Accept Online Paymer	nts		1	Bill pay		
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Send an Invoice	Accept s are included without up-fr	t Payments Now ont or recurring fee		S Pay a bill	R Pay a person	S Manage payments



# C♡ autobooks

## Step-by-Step Enrollment Process

**STEP 1:** Click on Autobooks within online banking. The Terms and Conditions will display and allow you to select which checking account you wish to deposit funds (if you have more than one checking account).

Welcome to Autoboo untobooks is the simplest w our Anytown USA account. Accept ACH at 2.25% am No more waiting around I score to twee an another.	Terms and Conditions         1. Definitions         In addition to terms defined in the Agreement, capitalized terms used in this Agreement that all have the following meanings:         (a) Card Data of the Mark Strategies are provided to Lice:         (a) Card Data of means that dispositions; successens, and assigned transactions with which the Berrices are provided to Lice:         (a) Card Data of means that dispositions; successens, and assigned transactions may be routed, and the subsidiaries, successens, and assigned transactions are provided to Lice:         (b) Card Data of means that dispositions; successens, and assigned transactions are provided to Lice:         (b) Card Data of means that dispositions; successens, and assigned transactions are provided to Lice:         (c) Card Data of means that dispositions; successens, and assigned transactions are provided to Lice:         (c) Card Data of means that dispositions; successens, and assigned transactions are provided to Lice:         (c) Data of the provest of Life, Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the provest of Life; Successens (Life)         (c) Data of the Life; Successens (Life)         (c) Data of the Life; Successensens (Life)         <
	Checking and More (x0000X1224)  Accept Terms and Continue

**STEP 2:** You will be taken to a short tutorial. You can choose to create an invoice or access your payment link.

Í INVOICE S	
Invoice	Payment Form
Do you need to send an itemized bill to a customer?	Do you need a fast way to get paid with only a link?
Invoices are detailed bills that let you list the products or services you're requesting payment for. Each invoice has a "Pay online" button customers can click to pay you.	Your personal Payment Form link is a unique link you can share anywhere to quickly and easily let people pay you.





**STEP 3:** If Autobooks is missing key data for your business after you complete the tutorial, this information will be asked for now. Key data includes: The owner's name, phone number, date of birth, SSN, or home address of the business and/or business owner.

Payment Form	-		
Settings	Consult Yours Here's Here's Hitter's Hitter's Thork	<text><image/><text><text><text><text></text></text></text></text></text>	

**STEP 4:** You will see a confirmation once the key data has been entered. You may click away from the key data gathering modal at any time before completion. If you do click away, there will be a persistent (clickable) reminder message that key data is required for payment processing approval. Your business cannot process your first payment without providing this information.

Payment Form				
Settings	Enai Saw Yourb Barra Hatta Heres Heres Hatta Hatta Hatta Hatta	es for confirming your information with the second se	X ! accept payments. Lus toll free at	
	Send email			





Once enrollment is complete, you can upgrade your Autobooks experience with additional features.

To add Accounting, Financial Reporting, and other features click the tab labeled "Accounting." You will see monthly subscription and processing rate information. Click "Activate Autobooks" to complete your upgrade. Once activated, you will see the full Autobooks view.



#### Upgrade Success Message







### Fully Upgraded Autobooks view

	Dashboard	Customer payments Vendor payments		
	Invoices Payment Link	Incoming payments 2 Coming due 5 Past due 5	Customer payment totals	
<u>s</u>	Pay Bills	\$2,670 \$14,430 \$14,430	Month-to-date	\$11,000
:1.	Accounting		Year-to-date	\$5,000
-	Reports	Payment Form     Learn more about Payment Form     Sand this lisk to sustances to allow them to any adjace	Total cash	
ŝ	Settings	https://dev.autobooks.co/pay/sally-convell-pup-walkers-inc-1 Copy	REGULAR SAVINGS	\$21,098
0	Need Help?		E-WARDS CHECKING (*1213)	\$59,695.08
<b>∌</b> ।	Logout	Andrew Holstead has invoices that are overdue Andrew Holstead has paid you \$4,778 over the past 12 months	YOUNG INVESTORS (*7879)	\$90,040.25
		Kristin Hope has paid you \$75.72     Invoice #4536001     Kristin Hope has paid you \$4.778 over the past 12 months		
		Graham Robert has paid you \$21.66 from your Payment Form. View details     Description: Test1234     Graham Robert has paid you \$1,452 over the past 12 months		Đ

For guidance on Autobooks enrollment or questions, please reach out to your local BRB representative or our Customer Service team by email <u>customerservice@mybrb.bank</u> or call toll-free at (888) 331-6521.