

Getting Paid with **Autobooks**



Guide Contents

- What's in your Autobooks toolkit?
 - The “Need to Knows”
 - Which payment tool is right for you?
 - Demo
 - Tips to get started
-

**Additional
Resources:**

help.autobooks.co



Autobooks is built to be part of your everyday banking experience.

Autobooks partners with banks and credit unions to offer invoicing, payment acceptance, accounting, and more — **all inside online and mobile banking.**

Manage your business in the same place you manage your banking



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



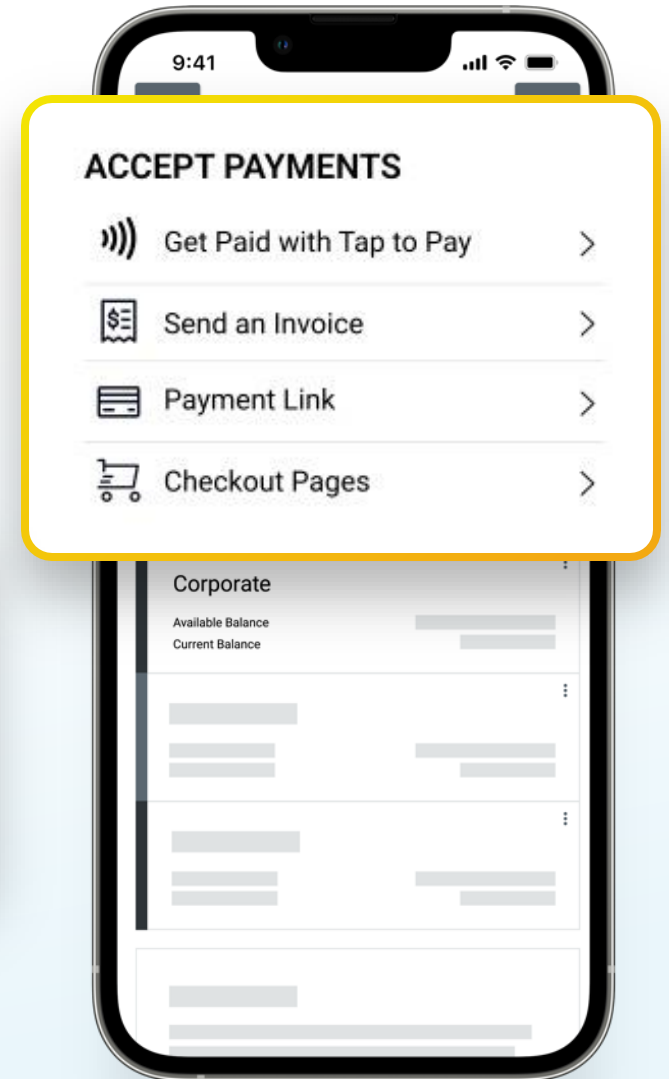
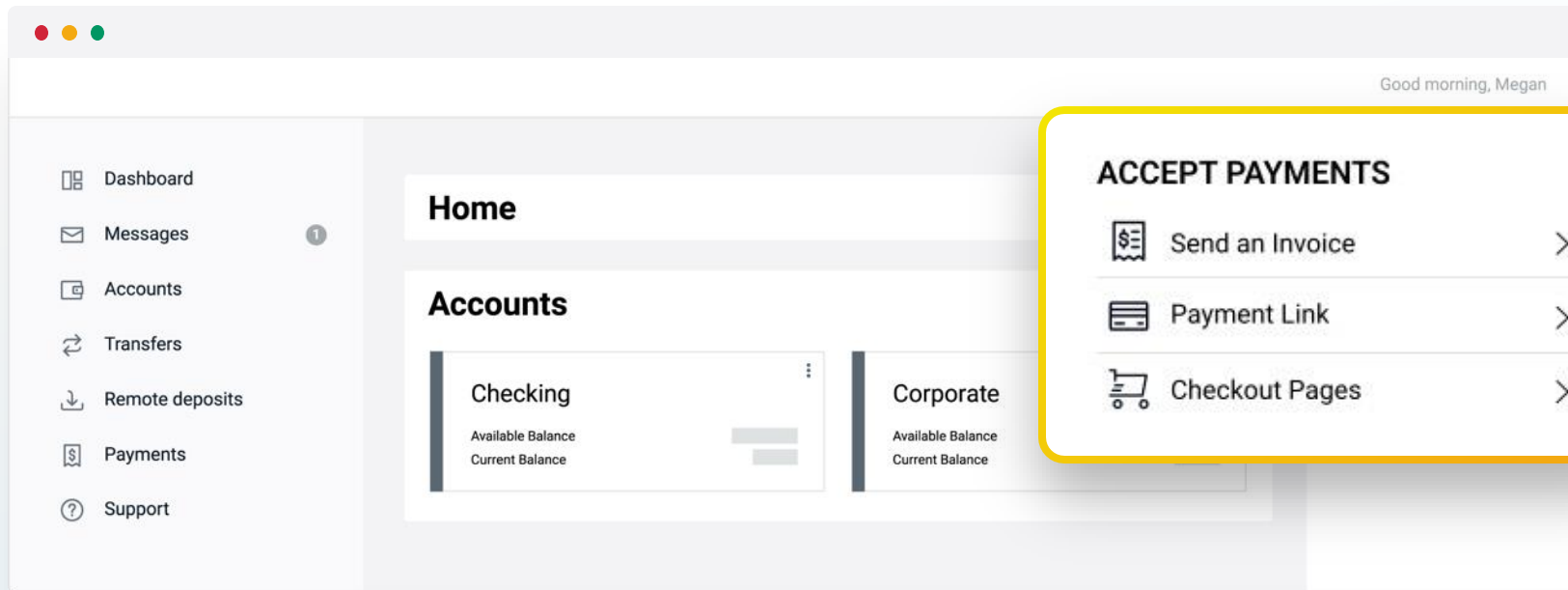
All payments received are deposited directly into your bank account, not a third-party payment app.



Receive support directly from Autobooks, a trusted partner of your financial institution

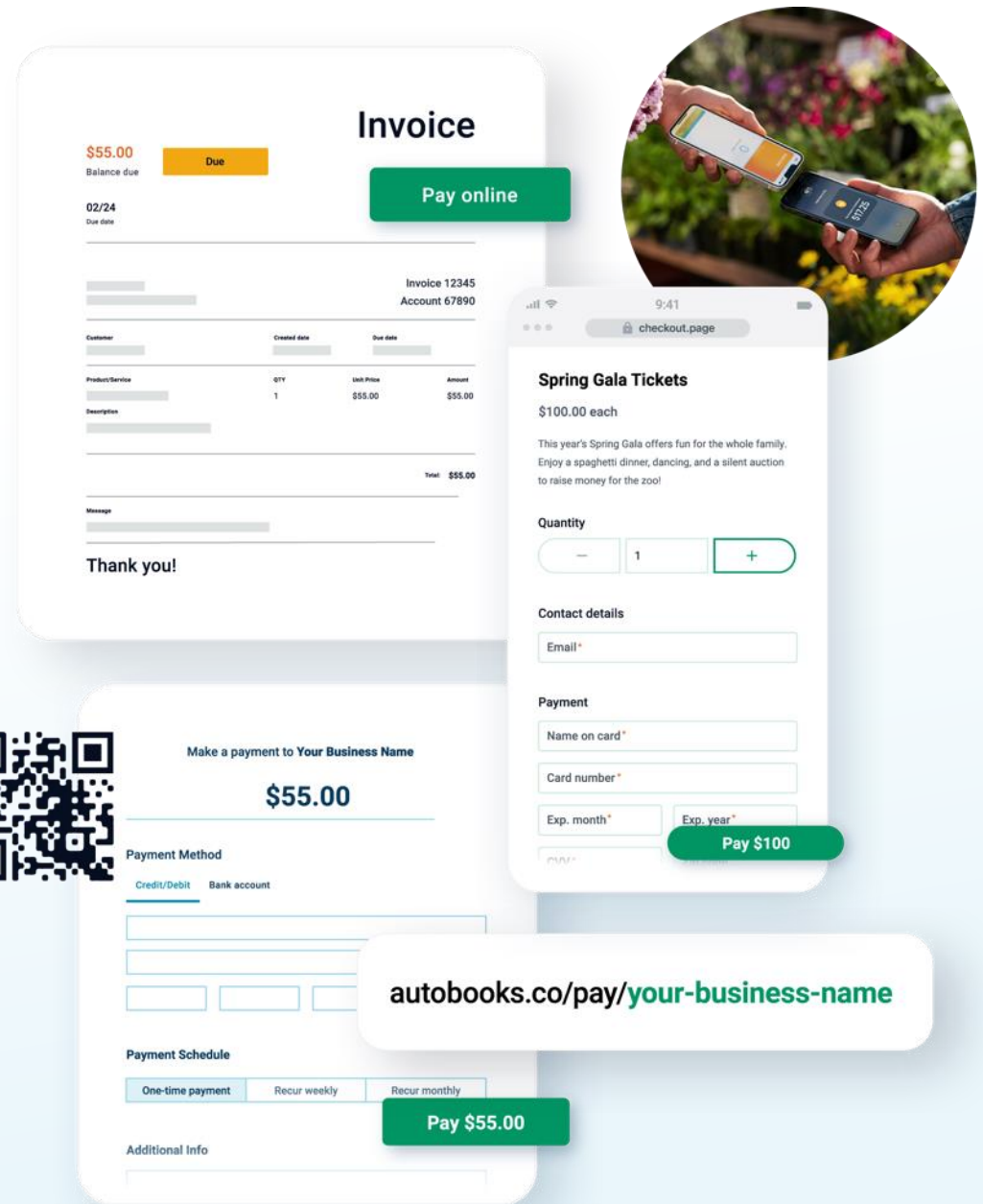
We've partnered with your financial institution to make it easy for you to accept customer payments directly from online and mobile banking.

Access our features inside your financial institution's **online** and **mobile banking apps.**



Ways to accept customer payments

1. Send a digital invoice
2. Share a secure payment link
 - a. Display a QR code
 - b. Enter a payment directly in the app
3. Sell your products or services with Checkout Pages
4. Accept a card or phone tap on your iPhone with Tap to Pay (*Available at select financial institutions)



THE BASICS

Share your preferred payment tool with customers

1

Customers can pay directly using any major card, including American Express® across all payment tools, and also by ACH bank transfer via invoicing or your payment link. You'll only pay 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.

2

Confirmation emails will be sent to you and your customer, as long as email was collected

3

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

4

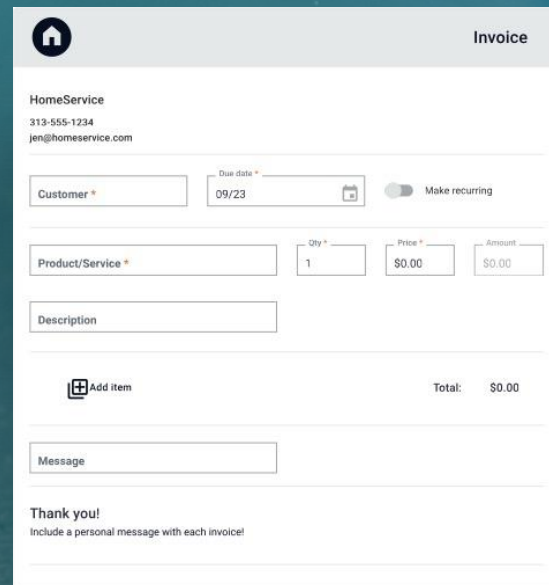
View your collected payments in app under each payment tool and a breakdown of your deposits using the *Settlement Details Report*. **Deposits are batched**, so if multiple payments are made in one day, you'll see one deposit hit your account per payment type, and fees withdrawn separately.

Which payment tool is right for you?

Share your business type in the chat!

Send a line-item digital invoice to a customer

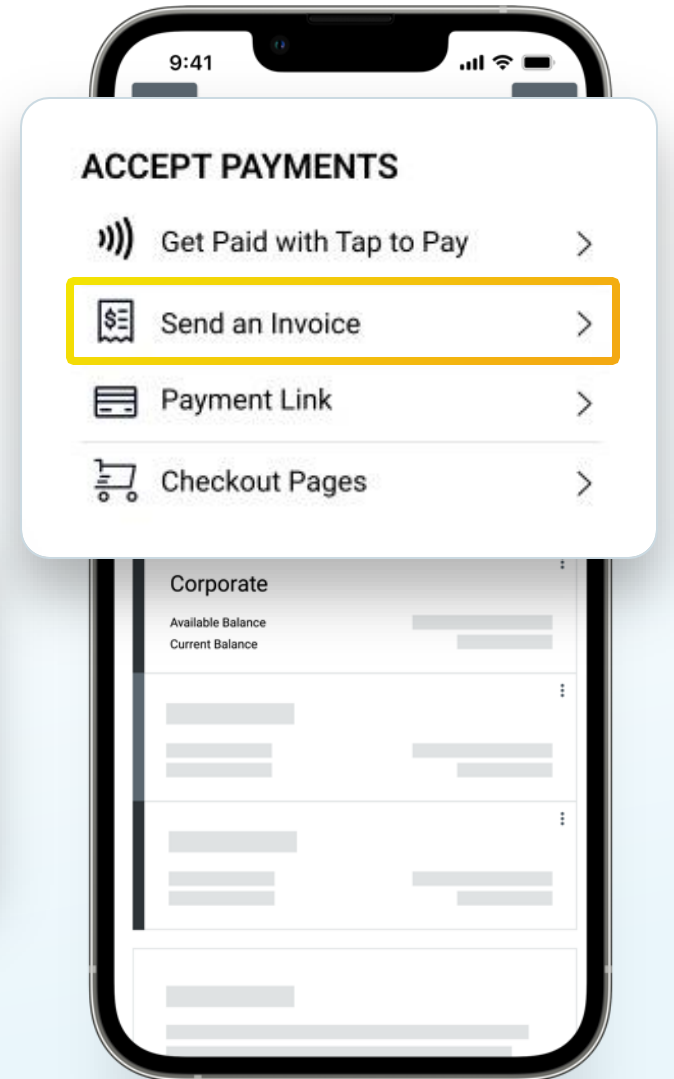
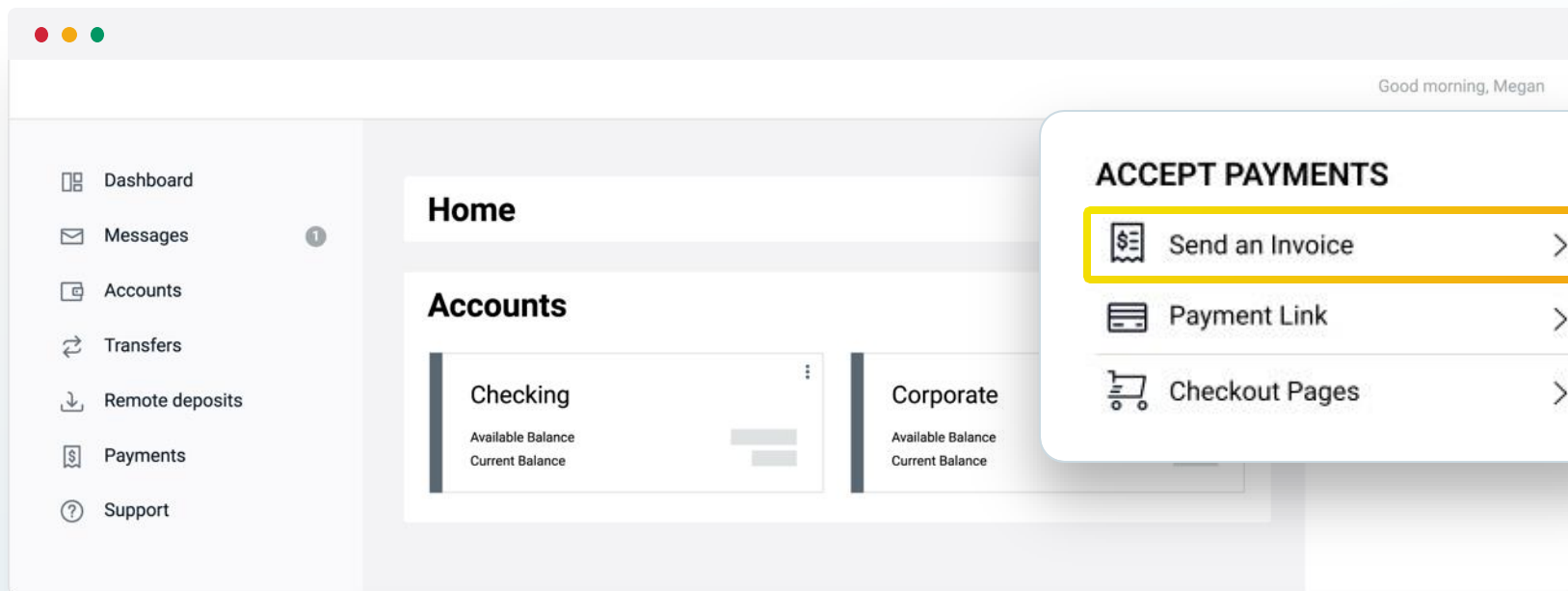
- **Send an invoice from anywhere, mobile or desktop.** Just fill out the basic fields on your invoice inside online or mobile banking, then click send.
- Your invoice is delivered to your customer via email. **Customers can click on a link from their email to view and pay.**




The screenshot shows a mobile application interface for creating an invoice. At the top, there is a home icon and the word "Invoice". Below this, the business name "HomeService" is displayed along with contact information: "313-555-1234" and "jen@homeservice.com". The form includes several input fields: "Customer *", "Due date *" (with a calendar icon and "09/23" entered), and a "Make recurring" toggle switch. Below these are fields for "Product/Service *", "Qty *" (with "1" entered), "Price *" (with "\$0.00" entered), and "Amount" (with "\$0.00" entered). A "Description" field is also present. At the bottom of the form, there is an "Add item" button and a "Total: \$0.00" label. A "Message" field is located at the very bottom, with a "Thank you!" note and the instruction "Include a personal message with each invoice!" below it.

- Trades
- Professional services
- Storage facilities
- HOAs
- and more...

Select **Send an invoice** from online or mobile banking.



Complete the various fields within the invoice builder.

Invoice

HomeService
313-555-1234
jen@homeservice.com

Customer * Due date * Make recurring

| | | | |
|---|--------------------------------------|---|--|
| Product/Service * <input type="text" value="Service Call"/> | Qty * <input type="text" value="1"/> | Price * <input type="text" value="\$125.00"/> | Amount * <input type="text" value="\$125.00"/> |
|---|--------------------------------------|---|--|


Description

Total

Message

Thank you!

Customize your invoice.
Make it recurring under *Invoice Schedules*.

Invoice

HomeService
313-555-1234
jen@homeservice.com

Customer * Due date *

| | | | |
|---|--------------------------------------|---|--|
| Product/Service * <input type="text" value="Service Call"/> | Qty * <input type="text" value="1"/> | Price * <input type="text" value="\$125.00"/> | Amount * <input type="text" value="\$125.00"/> |
|---|--------------------------------------|---|--|


Description

Total

Message

Thank you!

Preview
and send.

Invoice

HomeService

313-555-1234
jen@homeservice.com

| Customer | Created date | Due date |
|------------|--------------|----------|
| Otto Books | 09/02 | 09/27 |

| Product/Service | QTY | Unit Price | Amount |
|-----------------|-----|------------|----------|
| Service Call | 1 | \$125.00 | \$125.00 |

Description

Standard tune-up

| | |
|--------|----------|
| Total: | \$125.00 |
|--------|----------|

Message

Let us know if you have any additional needs!

Thank you!

HomeService
5128 Auto Drive
Detroit, MI 48226

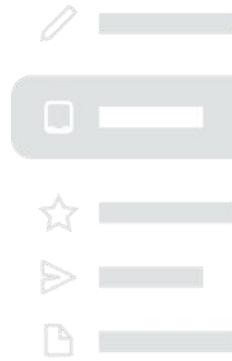
Send invoice

Preview invoice

Save invoice as draft

Save to list

A summary
will show up
in your
customer's
email inbox.



You have an invoice from HomeService:

Invoice Summary

Due date: 09/23

Amount: \$125.00

Let us know if you have any additional needs!

[View details and pay online](#)

See your full invoice and pay securely with [Your Financial Institution] and Autobooks.


Why am I getting this email?



What is Autobooks?




They can pay
by credit card
or bank
transfer.




Invoice from **HomeService**

Due 09/27

\$125.00 


Message

Let us know if you have additional needs!

 [View full invoice](#)

Payment Method

Credit/Debit Bank account



Text or email a secure Payment Link

- Prefer to have a customer pay from their own device? **Text or email a secure payment link to your Payment Link**, where they can complete the transaction themselves.
- **Take a customer payment on the spot** — just enter the payment details into your unique Payment Link inside online or mobile banking.

Everything turned out great!

Can I pay with credit card?

Thanks for hiring us! Yes, you can pay by credit card by going to this link:

autobooks.co/pay/modelgarage

Awesome, just paid. That was really easy!

- Trades
- Gig workers
- Personal services
- Property Management/Landlords



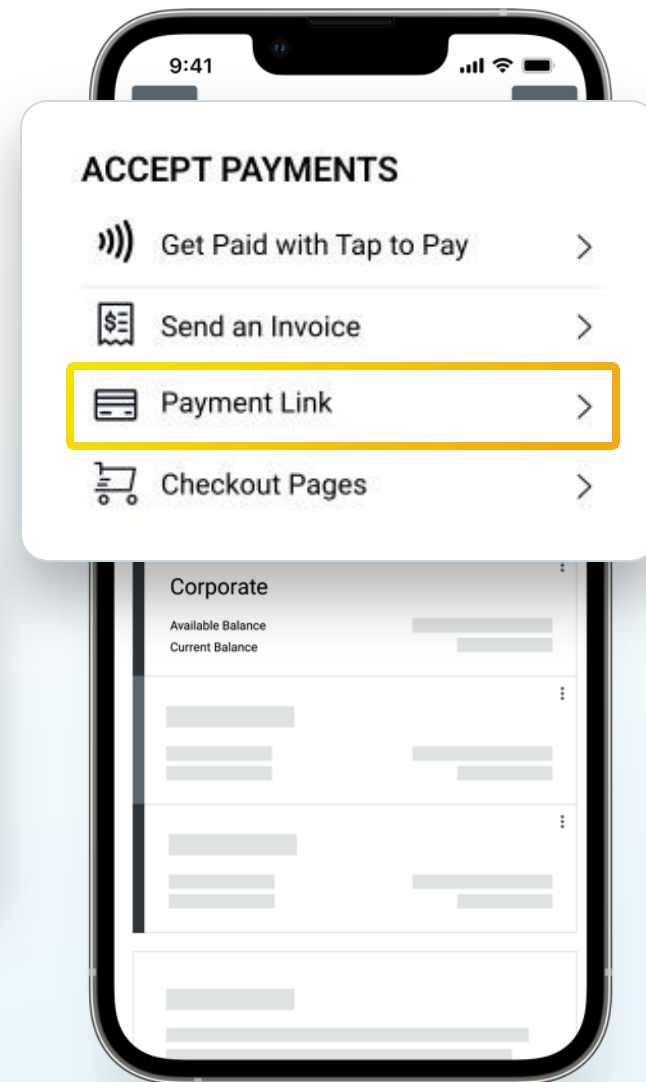
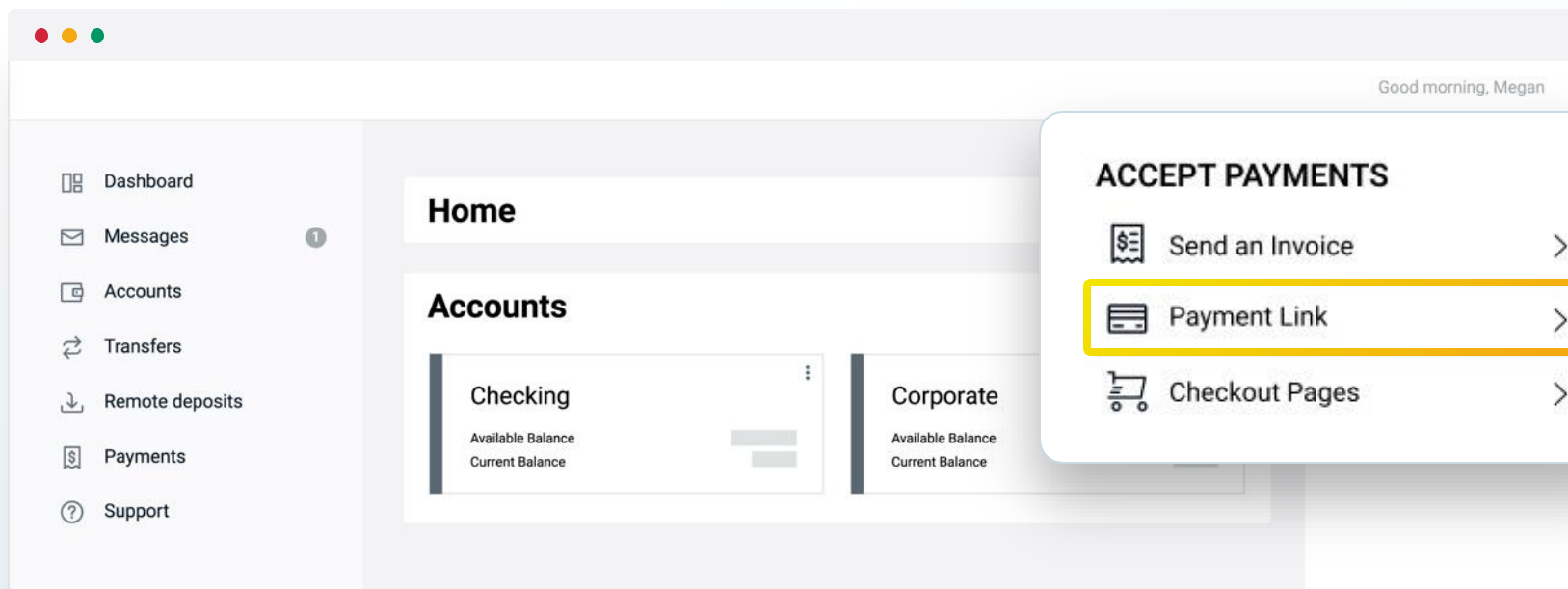
Jenny's Jewelry

Get paid through a QR code

You can even access a **QR code that links directly to your Payment Link**. Display it anywhere you'd like to accept payments (stickers, pamphlets, business cards — anywhere!).

- Collect at time of service
- Nonprofits & Religious Organizations
- Farmer's Markets & Craft Shows

Select **Payment Link** from online or mobile banking.



Take a payment on the spot by entering payment details yourself.

Payment Link



Accept a payment

Enter your customer's payment details or have them scan your QR code to accept credit card and ACH payments.

Enter payment details

Display QR code



Share your Payment Link

Copy your unique Payment Link and send it to customers to allow them to pay online:

autobooks.co/pay/homeservice

Copy link



Make a payment to Home Service

\$55.00

Payment method

Credit/Debit

Bank account

Otto Books

6125034982950193



01

2027

735

91502

Payment schedule

What's this?

One-time payment

Recur weekly

Recur monthly

Additional info

otto.books@gmail.com

Share your
Payment Link.
Customers enter
their own details.

[Click here to pay now](#)

Payment Link



Accept a payment

Enter your customer's payment details or have them scan your QR code to accept credit card and ACH payments.

 Enter payment details

 Display QR code



Share your Payment Link

Copy your unique Payment Link and send it to customers to allow them to pay online:

autobooks.co/pay/homeservice

Copy link

Everything turned out great!

Can I pay with credit card?

Thanks for hiring us! Yes, you can pay by credit card by going to this link:

autobooks.co/pay/yourbusiness

Awesome, just paid. That was really easy!

Display a QR code.



Payment Link



Accept a payment

Enter your customer's payment details or have them scan your QR code to accept credit card and ACH payments.

 Enter payment details

 Display QR code



Share your Payment Link

Copy your unique Payment Link and send it to customers to allow them to pay online:

autobooks.co/pay/homeservice

Copy link



Update your Payment Link to take donations or contributions.



Take donations or contributions

You can update your Payment Link to take donations or contributions from your patrons instead of payments.

To start taking donations or contributions, head to Settings and click the Payment Link tab. Then click Edit Information and you'll see a new "Payment type" dropdown that will let you choose to offer payments, donations, or contributions to your donors.

Once you select "Donation" or "Contribution," click Preview Information to see your updated Payment Link form. You'll notice that every instance of the word Payment on the form has been replaced with the word Donation or Contribution.

Finally, hit Save settings to lock in these changes. This will immediately update your Payment Link page to say "Donation" or "Contribution" across the board. Now, when your patrons click your Payment Link, they'll see the option to make a donation or contribution instead of a payment.

[Update my Payment Link](#)

Edit business information to be displayed

Business name
Home Service

Business phone number
313-555-1234

Business email
jen@homeservice.com

Payment

Donation

Contribution



Cancel

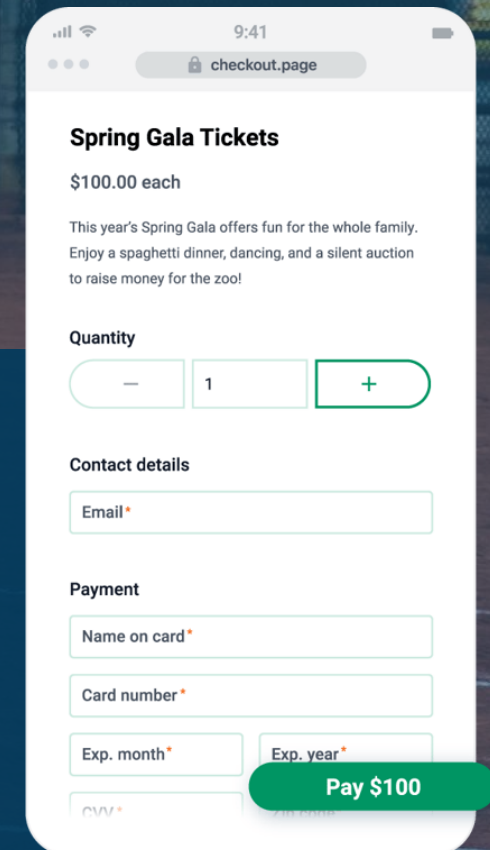
Preview changes

Share or post a Checkout Page

- **Set a price and collect sales.** Accept payments for your products, services, donations, membership fees, and more.
- **Customers can pay from their own device.** Post on your website, share on social media, or send directly to customers/donors.
- **Customize the form to match your needs.** Decide what fields are required and create your own.

Click here to pay now





- Associations/Clubs
- Nonprofits
- Businesses with set pricing
- Regular service providers
- Photography














The image shows a smartphone screen displaying a checkout page for 'Spring Gala Tickets'. The page includes a title, price per ticket (\$100.00), a description of the event, a quantity selector set to 1, and a contact details section with an email field. The payment section contains fields for 'Name on card', 'Card number', 'Exp. month', and 'Exp. year'. A green 'Pay \$100' button is visible at the bottom right of the form.

Select **Checkout Pages** from online or mobile banking or directly from the Autobooks menu.

ACCEPT PAYMENTS

-  Get Paid with Tap to Pay >
-  Send an Invoice >
-  Payment Link >
-  **Checkout Pages** >

-  Dashboard
-  Invoicing
-  **Checkout Pages**
-  Payment Link
-  Pay Bills
-  Accounting
-  Reports
-  Settings
-  Need Help?
-  Connected Apps
-  Logout

Create a Checkout Page.
Set your price, customize fields, and choose to allow quantities.

✕ Create a checkout page

Let's create your checkout page

What are you selling?

Include a detailed description

How much do you want to charge?

Customer options

We always collect an email address from each of your customers

Let customers choose an order quantity

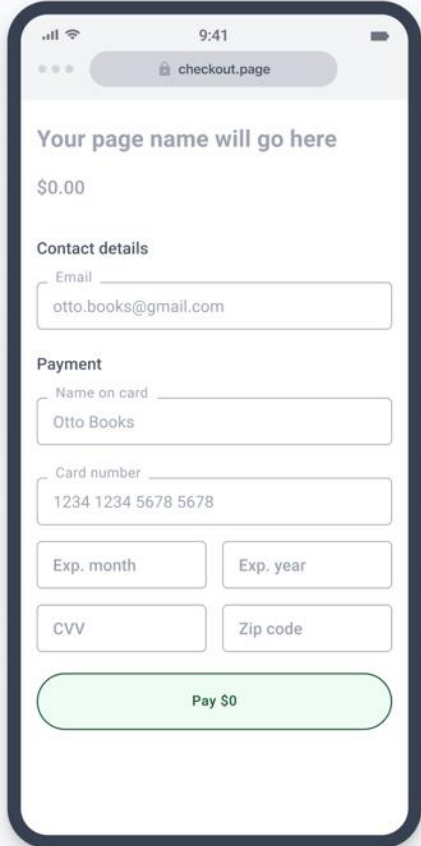
Collect mailing address

Collect phone number

I need something else from my customers
You can use this field to tell your customers what else you need to complete the checkout

Create checkout page

Preview



The preview shows a mobile view of the checkout page. At the top, it says "Your page name will go here" and "\$0.00". Below that is a "Contact details" section with an email field containing "otto.books@gmail.com". The "Payment" section includes fields for "Name on card" (Otto Books), "Card number" (1234 1234 5678 5678), "Exp. month", "Exp. year", "CVV", and "Zip code". A green "Pay \$0" button is at the bottom.

View your checkout pages and associated sales directly within online banking

The screenshot displays the 'Checkout Pages' section of an online banking interface. On the left is a navigation sidebar with options: Dashboard, Invoicing, Payment Link, Checkout Pages (selected), Pay Bills, Accounting, Reports, Settings, Need Help?, Connected Apps, and Logout. The main content area has tabs for 'Checkout Pages' and 'Sales'. A dark blue button with a plus icon and the text 'Create a new Checkout Page' is at the top. Below it is a table with columns for 'Page name', 'Status', and 'Price'. The table lists several services: 'Standard Lawn Trim' (Online, \$35.00), 'Monthly Fertilizer Treatment' (Online, \$19.00), 'Seasonal Snow Removal' (Offline, \$44.00), 'Seasonal Leaf Removal' (Online, \$38.00), 'Garden Mulch Delivery' (Offline, \$50.00), and 'Extra Large Lawn Trim' (Online, \$45.00). A modal window titled 'Standard Lawn Trim' is open on the right, showing a URL: <https://checkout.pages/mY89BpciRhBWNNTzP4> and three options: 'Open Checkout Page', 'Edit Checkout Page', and 'Take Checkout Page offline'.

| Page name | Status | Price |
|------------------------------|---------|---------|
| Standard Lawn Trim | Online | \$35.00 |
| Monthly Fertilizer Treatment | Online | \$19.00 |
| Seasonal Snow Removal | Offline | \$44.00 |
| Seasonal Leaf Removal | Online | \$38.00 |
| Garden Mulch Delivery | Offline | \$50.00 |
| Extra Large Lawn Trim | Online | \$45.00 |

Accept payments in person on your

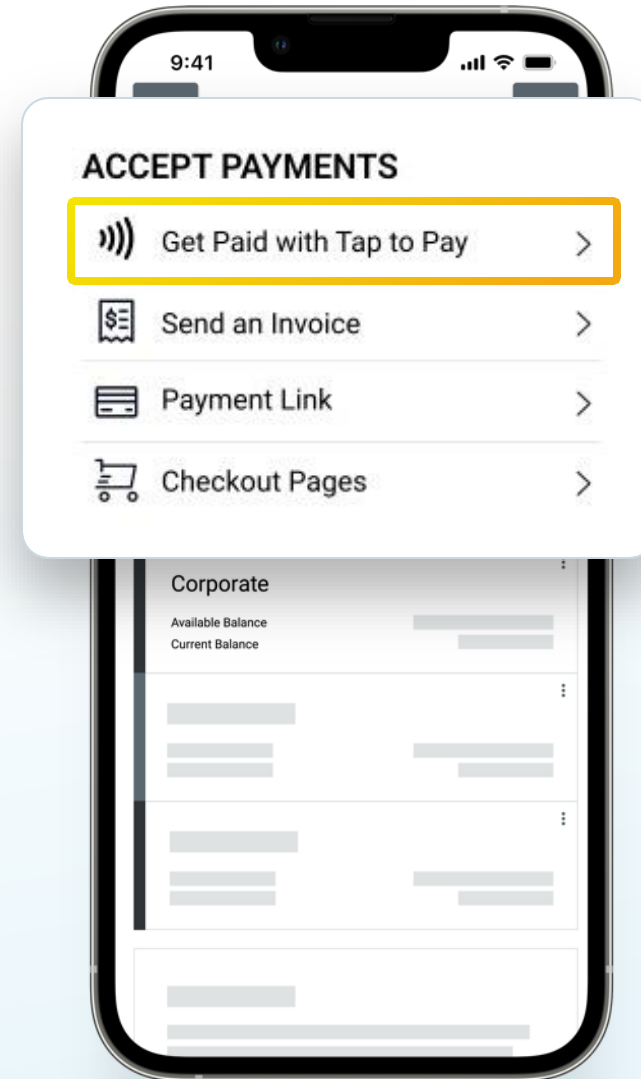
iPhone with Tap to Pay

- **Customers can pay with a single tap** using any major credit card or digital wallet, including iPhone, Apple watch, and Androids
- **Send a receipt** via email or text at time of service
- **Display tip option**, if preferred

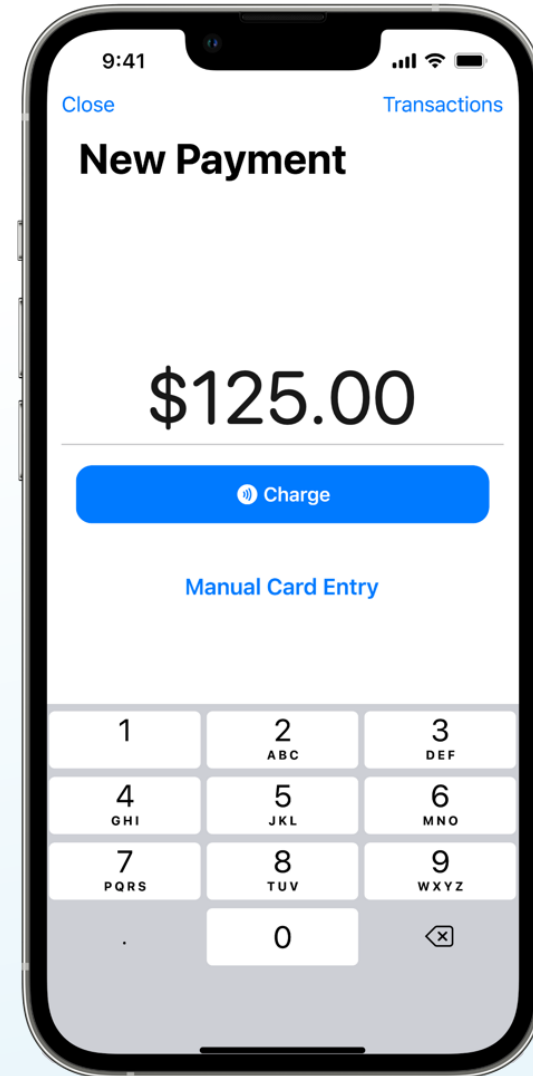
- In person service providers or product sales
- Lawncare & Landscaping
- Beauty salons
- Farmer's Markets & Craft Shows



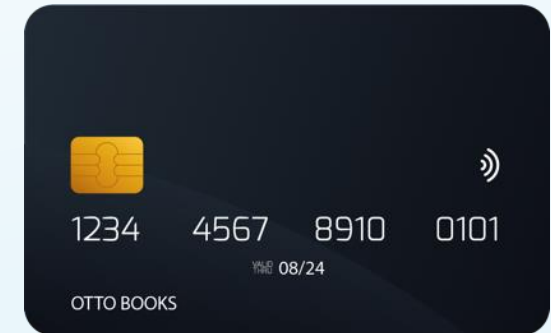
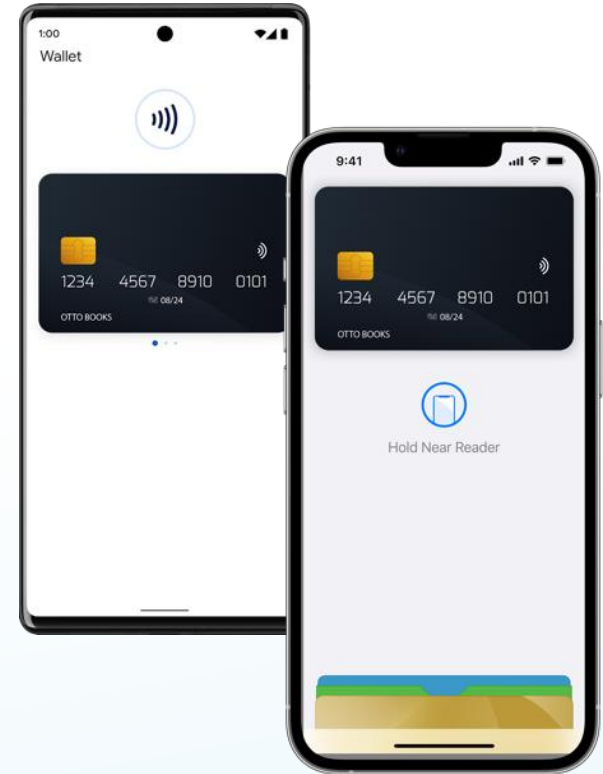
Select **Get Paid with Tap to Pay** from your mobile banking app.



Enter the amount to be paid and present your phone to the customer.

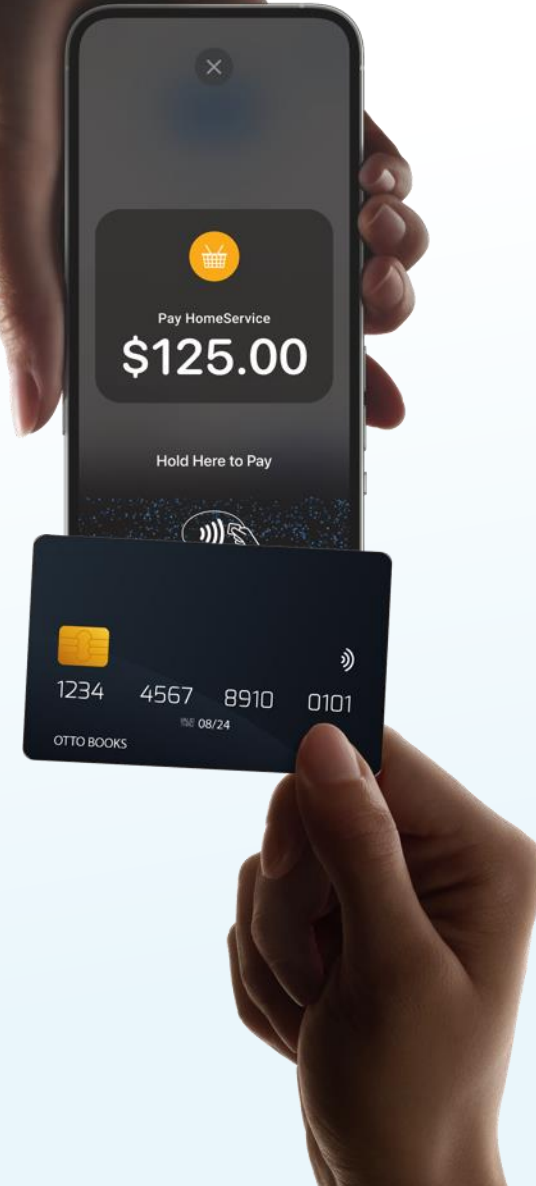


They can pay with debit cards, credit cards, digital wallets like Apple Pay, and more.



The customer holds their card or device at the top of your phone.

When you see the done checkmark, the transaction is complete!



PAYMENT TOOL WRAP UP

What payment tool(s) fits your business best?



Invoicing



Payment Link



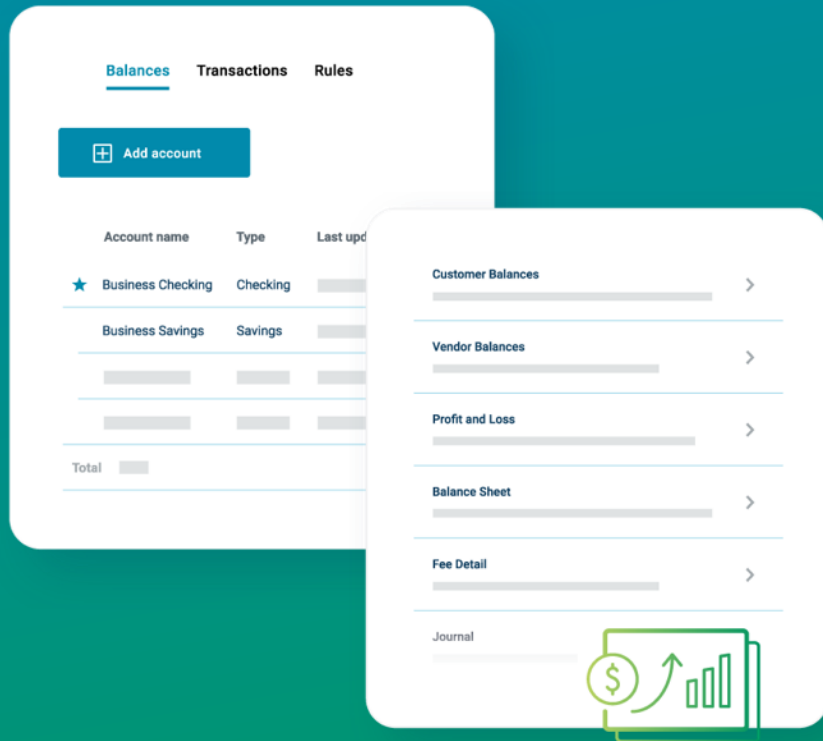
Checkout Pages



Tap to Pay on iPhone

ADDITIONAL FEATURES

Accounting and Reporting



1

Upgrade within online banking for \$9.99 per month

**While \$9.99 is the typical rate, rates may vary by institution.*

2

View account balances & transactions in real time.

Bank accounts at your financial institution will connect automatically, and you can link external accounts.

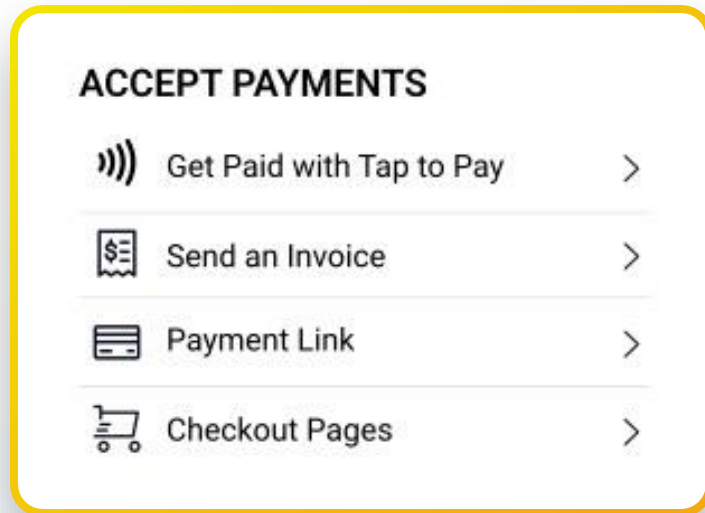
3

Automate bookkeeping entries by categorizing transactions, matching deposits to invoices, creating rules, & more

4

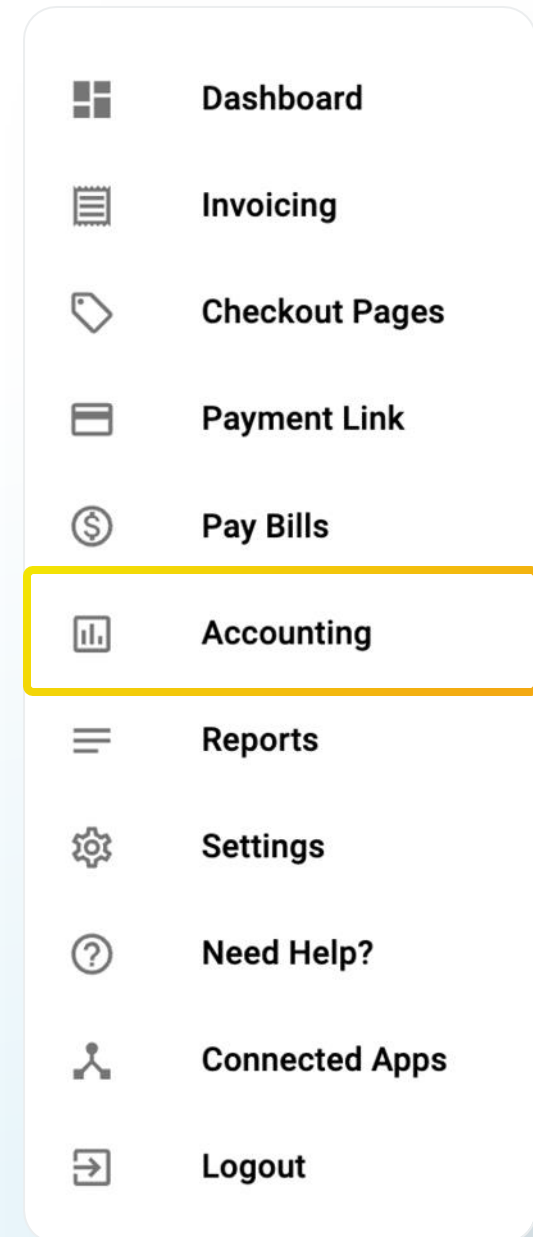
Access financial reports that are automatically generated based on your categorized transactions (P&L, Balance Sheet, Bank Reconciliation Report, & more)

Select any Autobooks payment tool from online or mobile banking.



Next, navigate to **Accounting** in the side menu

OR* upgrade within **My Toolkit in online banking



Autobooks in Action

Autobooks Product Demo

1. Overview of the payment tools
2. Overview of Accounting & Reporting
3. Any questions?

Where to Start:

1. Confirm contact info in Settings
2. Add any sub-administrators
3. Customize your payment tools (add logo, custom messaging, etc)
4. *Bonus for Nonprofits:* Update payment link verbiage to “donations” or “contributions”

LEARN MORE

autobooks.co

NEED HELP?

help.autobooks.co/knowledge

Have a question or need support?

Email: support@autobooks.co

Phone: (866) 617-3122