



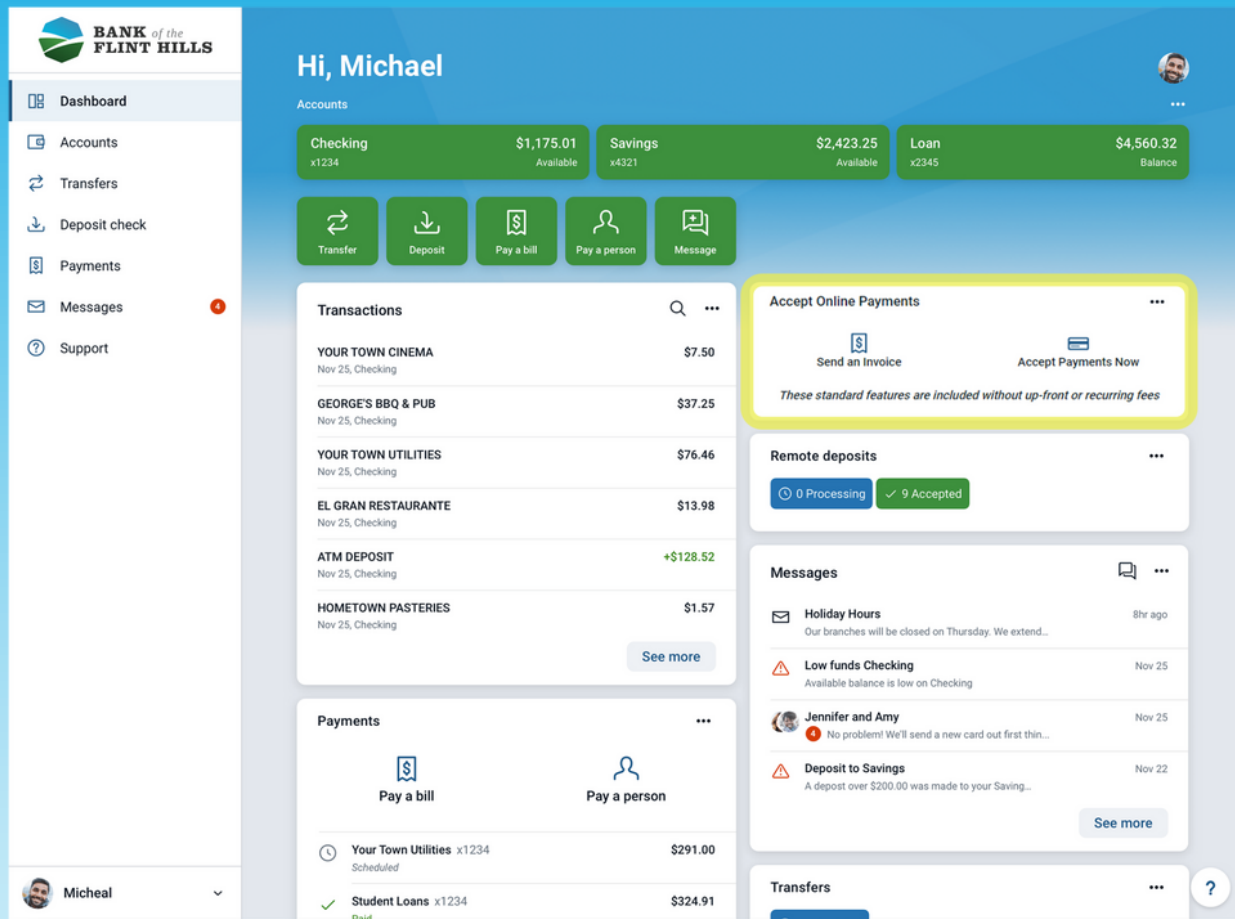
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FLINT HILLS



ENROLLING IN AUTOBOOKS

From Enrollment to Invoicing in Minutes

We've made it easy for any small business to enroll in Autobooks and get paid — either by invoice or by payment form — in a matter of minutes. In the following pages, we will take you through the enrollment steps.



Dashboard

On the dashboard of your online banking, access your Autobooks account by clicking on "Send an Invoice" or "Accept Payments Now". To enroll in the product, select the method of payment collection you would like to use and follow the on screen prompts to complete your account. Once enrolled, you can begin accepting card & ACH Payments in-app or online.



Send a professional invoice right to your customer's inbox

Create and send a great-looking invoice in minutes. Delight your customers with easy online payment options. You'll be able to see who paid their invoice, and who is past due.

☐ I accept the [terms and conditions](#)

Create and send your first invoice

The screenshot shows a professional invoice from Green Belle Lawn Care. At the top, it displays the company logo and name. The invoice number is 12345, and the account number is 67890. The customer is Carol Sanders. The invoice is dated 11/4/2020. The total amount due is \$556.00. The invoice includes a table with the following items:

Product/Service	QTY	Unit Price	Amount
Standard Lawn Trim	1	\$55.00	\$55.00

The description for the service is "Basic cut on front and back lawn". The total amount is \$55.00. There is a message at the bottom: "Some patches in the back yard may need fertilizer soon, something to consider!"

Invoicing Landing Page

After clicking "Send an Invoice", you will be directed to the Autobooks platform and prompted to accept the terms and conditions.

Sign up for Autobooks

Please confirm the Primary Business Owner information below.

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

First Name *	Last Name *
Stephanie	Green
Email *	Phone *
stephanie@greenbelle.com	555-567-5678
Date of Birth *	Title *
01/02/1993	CEO
SSN *	?
XXX-XX-6789	Edit

What is the Primary Owner's home address?

Home address should not be a P.O. Box.

Home Address 1 *

7970 UNIVERSITY AVE NE

Primary Information

A "Sign up for Autobooks" page will appear and will prompt you to fill out the information to create your account.



Business information

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Please provide the additional information below.

Company Formation Year * 2013	Business Structure * Sole Proprietorship ▼
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Which industry does your business serve?

Industry *

Administrative and Support and ▼

Industry Code *

Landscaping Services ▼

What is the largest single payment you expect to receive?

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

Largest Single Payment *

\$400.00

What is the average payment amount you expect to receive?

Average *

\$80.00

Business Information

A second page will appear and will prompt you to fill out the business information.



Business information

● ● ●

Please provide the additional information below.

Company Formation Year *

Business Structure *

LLC

Are there any additional owners

We need to know about owners that have 25% or more ownership.

☒ No, there are no other owners of 25% or more ownership

☐ Yes, there are other owners of 25% or more ownership

Which industry does your business serve?

Industry *

Administrative and Support and

Industry Code *

Landscaping Services

What is the largest single payment you expect to receive?

Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

Business Information - LLC

If you selected your business as a LLC, you will be promoted to fill out additional information.

Congrats! Your account is now live

Now, let's set up your first invoice so you can get paid directly into your business checking account.

First, you'll add your customer's info and a description of the product or service you're billing for.

Then, you'll have a chance to review your invoice before you hit send.



[Add my first customer](#)

Congrats Message

Once approved, you will receive confirmation that your account is live. To begin a guided tour of the invoicing process, click "Add my first customer" at the bottom right.

