



WORKSHOP: WEEK 1

Accessing and Mass Enabling Autobooks





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Financial Institution Growth,
Autobooks

LAUNCH
WORKSHOP

Schedule

WEEK 1: ACCESSING AND MASS ENABLING AUTOBOOKS

Tuesday Workshop Session:

- Expectations and getting ready for launch
- Exploring Autobooks and building your team

Thursday Deep Dive & Demo:

- Guided first payment experience, Overview of the Hub

WEEK 2: YOUR PROGRAM HEALTH CHECK AND GROWTH FLYWHEEL

Tuesday Workshop Session:

- Autobooks Health Check – Your Program Expectations
- Preparing the team and GTM best practices

Thursday Deep Dive & Demo:

- Operationalizing the Hub & Best practices for program growth

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Agenda

- Your Launch Expectations
- Building Your Launch Team
- Supporting Your Launch
- Autobooks Product Details: Setting Up a Test User
- Positioning the New Autobooks Packages
- Intro to the Hub
- Next Steps

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Expectations

What we are here to accomplish

Mass enable Autobooks in my digital banking platform for all my small businesses.

How we'll get it done

Visit our [Partner Page](#), locate your digital banking provider, and access your enablement guide.

YOUR TIMELINE TO LAUNCH AUTOBOOKS IN 6 WEEKS

WEEKS 1 – 2

- Complete operational & profit share forms
- Complete testing
- Access the Hub
- Inform your team

WEEKS 2 – 4

- Prepare your team
- Launch Autobooks (or have date set)

WEEKS 5 – 6

- Promote, launch, and market Autobooks to your small businesses
- Monitor activity in the Hub

Survey for the Group

**What is your planned
enablement date?**

Your Launch Team

Building Your Team

Autobooks Champion

Your Autobooks Champion is an **expert on the product and go-to person** at your institution.

Core Launch Team

Your core launch team consists of your **small business team members who will provide support** for Autobooks at your institution.

Identify Your Autobooks Champion

Steps I can take to become an Autobooks Champion

- **Become a Product Expert.** Test Autobooks to experience enrollment and accept test payment(s).
- Know where to find **Autobooks Resources** and how to share with the team.
- **Provide internal support** for your team and be the bridge between your team and Autobooks support.

Tell us who your Champion is!

We'll make sure they receive invites to our monthly product update and hub training webinars.

Identify Your Core Launch Team

Core Team Roles

- Testing
 - Enablement
 - Internal support for Autobooks
 - Internal documentation
- ✓ Include team in completion of Ops Form
 - ✓ Invite core team members to attend launch sprint and join the Hub

First Steps/Tasks for the Launch Team

Autobooks Champion

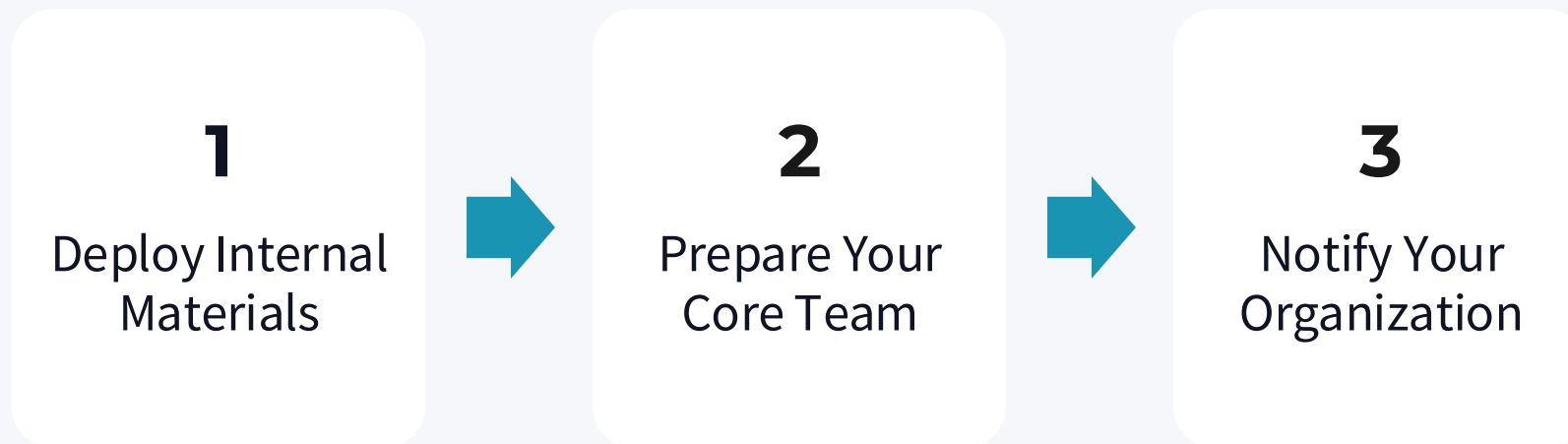
- Attend or review Launch Sprint content
- Test Autobooks
- Access the Hub
- Complete or delegate operational and profit share forms

Core Launch Team

- Attend or review Launch Sprint content (*deep dive/demo)
- Access the Hub

Preparing your Team for Launch

THREE STEPS TO PREPARE YOUR TEAM



Step 1: Deploy Internal Reference Materials

Reference materials are the first stop for your team if they have a question.

- Post materials where team members can easily find and reference them quickly

Include these items:

- Autobooks one-pager
- Autobooks FAQ
- Link to Autobooks basics e-learning module

*Additional resources are available upon request at no cost

Step 2: Prepare Your Core Team

- Distribute and complete the Autobooks Basics e-learning with your core team
- Review SMB and non-profit support procedures
- Register your core team for ongoing product updates

Step 3: Notify Your Organization

Autobooks Template

- Add a link or specific location to your internal reference material location
- Insert a reference to your Core Team in the placeholder and provide instructions on how the team can engage with them

OR

Write Your Own

Be sure to include:

- What the product launch is and who it's for
- Enablement date
- Link to core resources
- How to get help answering questions (how to engage core team)

Ongoing Resources



Monthly Autobooks Hub Webinar Training



Monthly Autobooks Product Update Webinar



Autobooks Training Resource Site

Supporting Your Team and Your SMBs

How Autobooks Support Works

For Your Team

- Autobooks FI Success supports your team
- Reach out to Support by submitting a ticket in the Hub or emailing fisuccess@autobooks.co
- Support, Q&A, and program growth

For Your Small Businesses

- Autobooks SMB Success supports your SMBs
- Team based in Detroit, MI
support@autobooks.co
- SMB Success engages SMBs at enrollment
- SMB [Support Center](#)

YOUR SUPPORT PROCESS

A customer-facing team member receives an Autobooks question or has one of their own



Team member consults internal resources



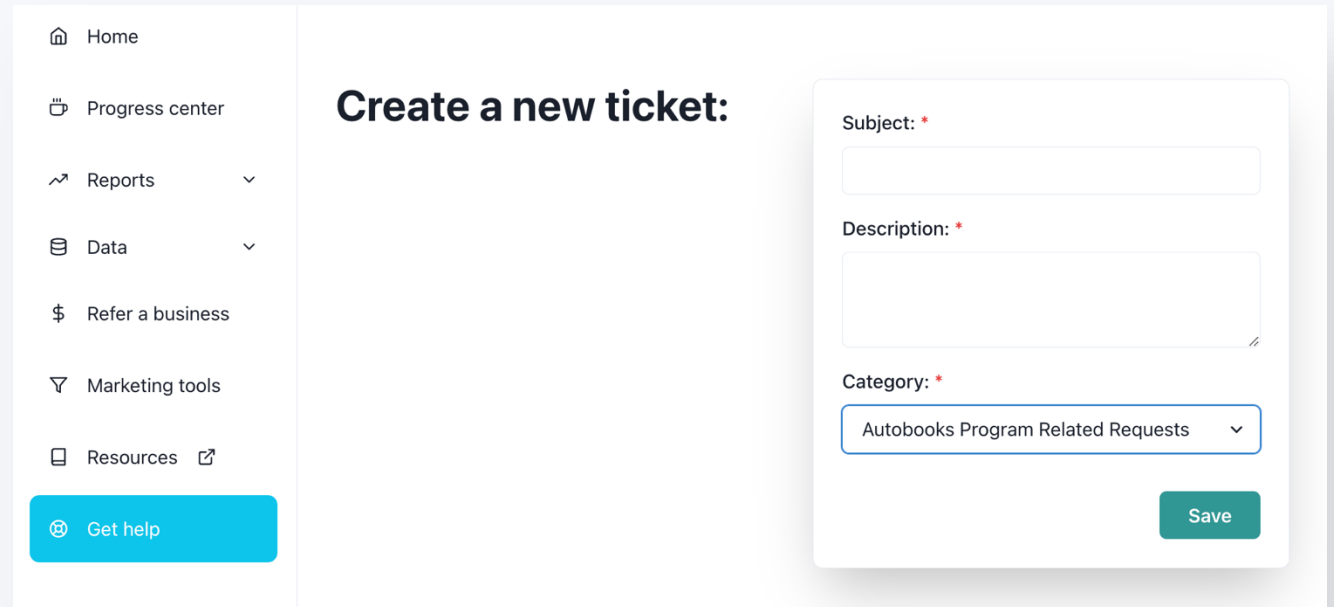
If internal resources are unable to answer the question, escalate it to the Core Team



If Core Team is unable to answer question, they create ticket via the Autobooks Hub

Submitting a Ticket

- Log into Autobooks Hub
- Click the **Get help** tab on lefthand side
- Submit a ticket with your issue or question. If it's for a specific SMB, include the SMB ID.



The screenshot shows the 'Create a new ticket' interface within the Autobooks Hub. On the left is a navigation sidebar with the following items: Home, Progress center, Reports, Data, Refer a business, Marketing tools, and Resources. The 'Get help' button at the bottom of the sidebar is highlighted in blue. The main content area is titled 'Create a new ticket:' and contains a form with three fields: 'Subject:', 'Description:', and 'Category:'. The 'Subject' and 'Description' fields are text inputs, while 'Category' is a dropdown menu currently showing 'Autobooks Program Related Requests'. A red asterisk indicates required fields. A green 'Save' button is located at the bottom right of the form.

Home

Progress center

Reports

Data

Refer a business

Marketing tools

Resources

Get help

Create a new ticket:

Subject: *

Description: *

Category: *

Autobooks Program Related Requests

Save

Autobooks Product & Demo Preview

Autobooks Product Demo Preview

Onboarding: A look through the SMB lens at enrollment and support from the Autobooks team

Product overview: How Autobooks helps SMBs get paid

Accept a payment

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

Enter payment details

Display QR code

Share your Payment Link

Copy your unique Payment Link and send it to customers to a

<https://autobooks.co/pay/homeservice>

Copy link

New invoice

New recurring invoice

Search criteria

Export

Name	Status	Invoice #	Due date	Total	Balance due
Calvin Warren	Due	934248	02/22	\$242.00	\$242.00
Gladys Alexander	Due	934265	02/15	\$73.00	\$73.00
Diane McCoy	Partial Payment	934363	02/04 ↻	\$257.00	\$170.00
Randall Miles	Active	934250	01/28 ↻	\$185.00	\$185.00
Johnny Pena	Due	934398	01/28	\$67.00	\$67.00
Ronald Webb	Paid	934327	01/24	\$218.00	\$0.00
Serenity Fisher	Past Due	934276	01/23 ↻	\$115.00	\$115.00
Nathan Wilson	Active	934268	01/23 ↻	\$92.00	\$0.00
Bessie Hawkins	Canceled	934373	01/17	\$214.00	\$214.00
Marvin Russell	Partial Payment	934274	01/17 ↻	\$235.00	\$30.00

Rows per page: 25

1-25 of 458

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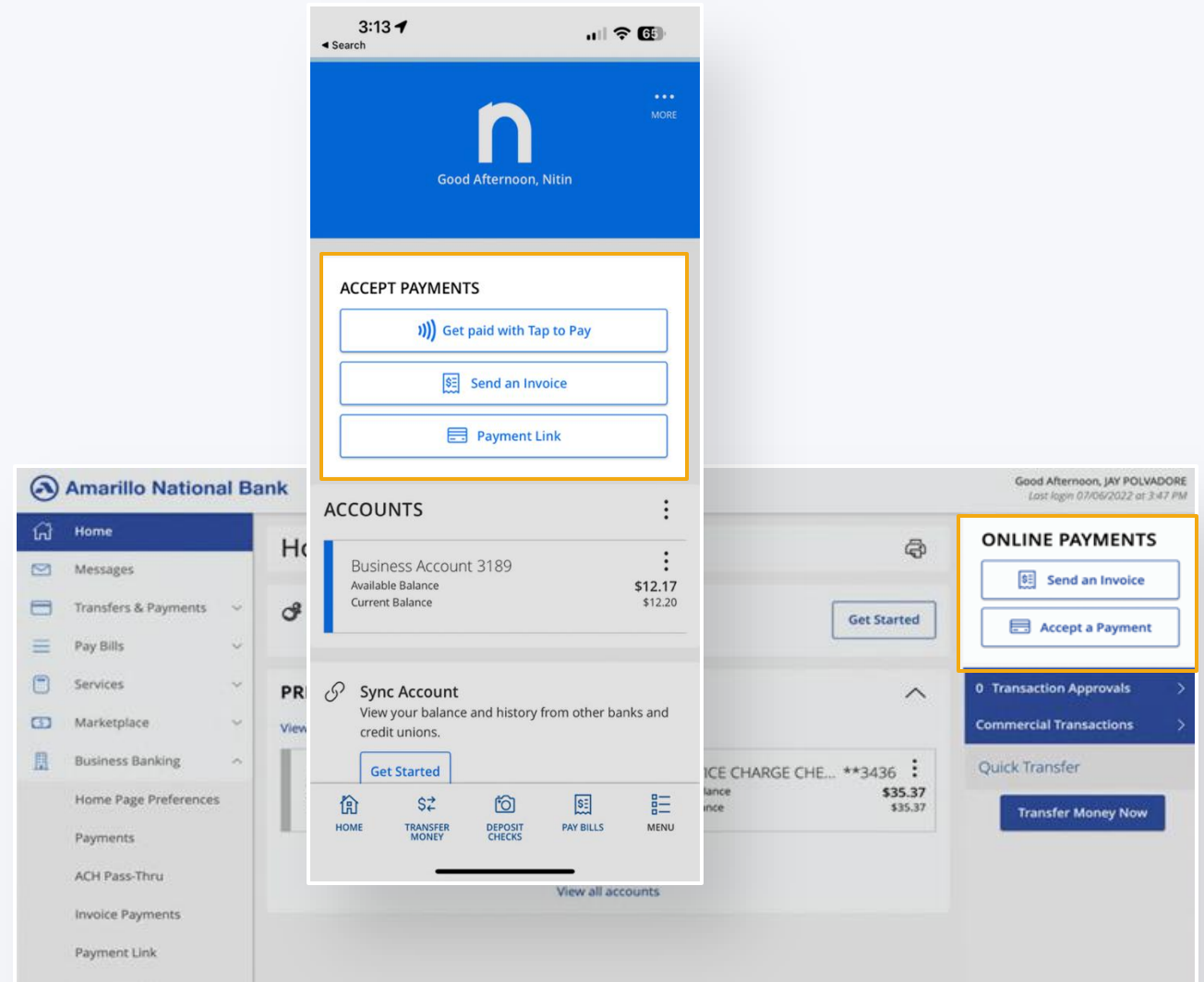
Enrolling in Autobooks: The SMB Journey

Enroll in 3 easy steps

Log into Digital Banking

Click the Autobooks module/tab

Agree to terms of use and submit payment application



Autobooks Underwrites & Supports the SMB



Autobooks handles all underwriting for payment processing and also owns all transactional risk.

This includes card chargeback and ACH return administration.

A vast majority of businesses can be underwritten, but **there are some in prohibited industries that we cannot underwrite** such as: Alcohol, tobacco, firearms, CBD, cannabis, most pharmaceuticals, and certain types of lending such as payday lending.

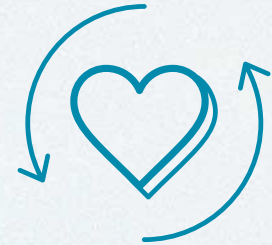
By helping small businesses get paid (through existing digital banking channels) a financial institution can:



**DIVERSIFY
REVENUE
STREAMS**



**EXPAND
RELATIONSHIP
DEPTH**



**INCREASE
PRIMACY**

Positioning Autobooks

Product tiers and feature comparison

The Autobooks Platform

The complete small business solution that enables financial institutions to better serve small businesses

RECEIVABLES & WORKING CAPITAL

Invoicing, payment links, QR code, Tap to Pay, and built-in capital access.

PAYABLES & MONEY MOVEMENT

New bill pay tools for businesses and consumers, plus external loan payment support.

ACCOUNTING INTEGRATION

All transactions flow into an integrated ledger to automate bookkeeping and financial reporting.

CASH FLOW VISIBILITY

A real-time dashboard helps businesses monitor and manage money in/money out.

FULLY EMBEDDED IN DIGITAL BANKING

No redirects.
No separate accounts.
No lost deposits.

Autobooks Packaging for Financial Institutions

Basic

Invoicing and payment acceptance built into digital banking.

Free — No monthly fee applies.

Base Functionality:

- ✓ Invoicing
- ✓ Check Out Pages
- ✓ Payment Link
- ✓ Payment Acceptance

ACH

Discover, Mastercard, Visa

Plus

Advanced payment functionality and working capital

Monthly license fee applies.

Everything in Autobooks Basic, and:

- + **Payment Acceptance**
 - Instant Payouts (Coming Fall 2025)
 - + Amex transaction support
- + **Tap to Pay on iPhone** (standalone app)
- + **Autobooks Capital**
 - Data driven merchant cash advance

Pro

The complete small business solution

Monthly license fee applies.

Everything in Autobooks Basic, Plus, and:

- + **Autobooks Accounting**
 - TransaAction Categorization
 - Cash Flow Management
 - Financial Reporting
 - Budgeting
 - QuickBooks Integration
- + **Small Business Dashboard Tiles for Digital Banking**
- + **Business Bill Pay** (optional add-on)

Feature and pricing packages above are for the financial institution and do not reflect feature bundles offered to the end user.

[Click here](#) for end user payment processing and accounting subscription fee schedule

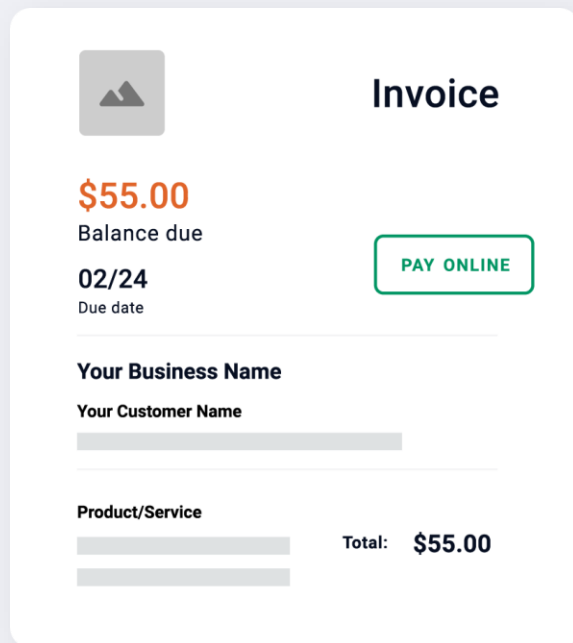
Customer Features

Enable businesses to get paid, pay bills, automate accounting task and manage their cash flow – all from digital banking

“Getting Paid” digital tools have become table stakes:

ONLINE INVOICING

Create and send professional invoices in the same place you do your banking.



The screenshot shows a clean, professional invoice layout. At the top left is a small mountain icon. To its right, the word "Invoice" is displayed. Below the icon, the amount "\$55.00" is shown in orange, followed by "Balance due" and the due date "02/24". A green button labeled "PAY ONLINE" is positioned to the right of the balance information. Below this, there are input fields for "Your Business Name" and "Your Customer Name". At the bottom, there are fields for "Product/Service" and a "Total: \$55.00" summary.

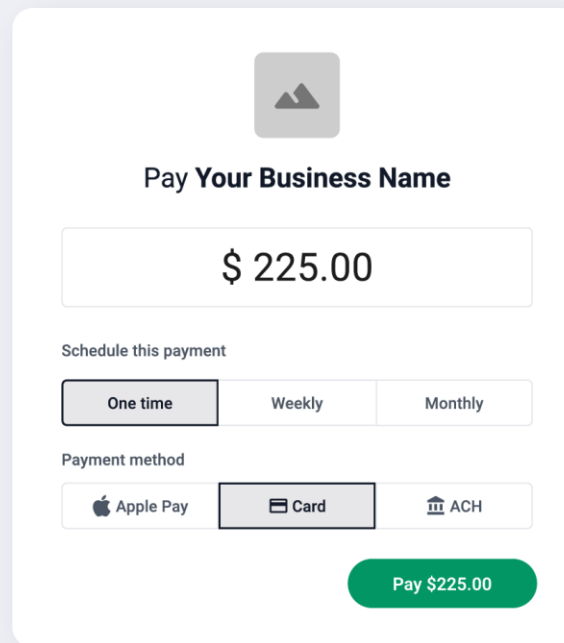
✓ Basic

✓ Plus

✓ Pro

PAYMENT LINK

Accept card payments or donations, anytime. Online, in-app, or over the phone.



The screenshot displays a payment link interface. It features a mountain icon at the top left. Below it, the text "Pay Your Business Name" is centered. A large white box in the center shows the amount "\$ 225.00". Underneath, there's a section for scheduling the payment with options for "One time", "Weekly", and "Monthly". Below that, the "Payment method" section offers "Apple Pay", "Card", and "ACH" options. A prominent green button at the bottom right says "Pay \$225.00".

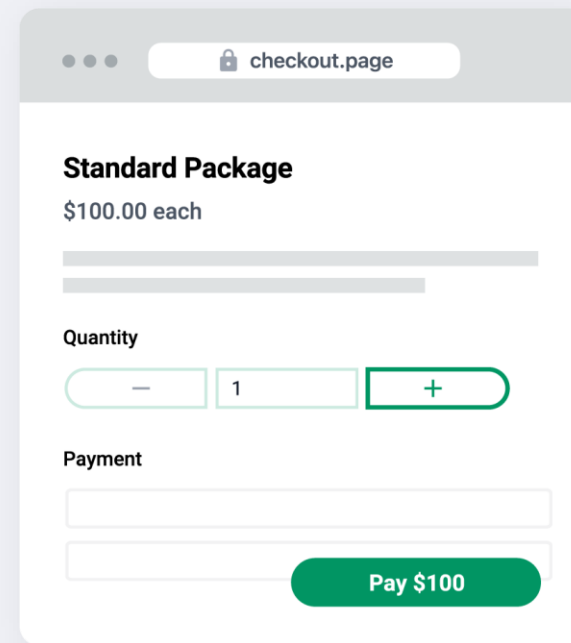
✓ Basic

✓ Plus

✓ Pro

CHECKOUT PAGES

Create a Checkout Page in minutes to sell a product or service, assess a membership fee, or collect a donation.



The screenshot shows a checkout page within a browser window. The address bar indicates the URL is "checkout.page". The main heading is "Standard Package" with a price of "\$100.00 each". Below this is a quantity selector with minus, 1, and plus buttons. A "Payment" section follows with two input fields for card details. A large green button at the bottom right is labeled "Pay \$100".

✓ Basic

✓ Plus

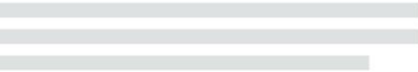
✓ Pro

If your FI believes it's crucial to invest in Cash Flow tools that SMBs are demanding today:

AUTOBOOKS CAPITAL

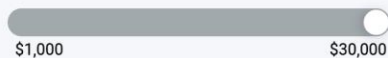
A flexible way for eligible businesses to fill short-term cash flow gaps.

You're approved for a
\$30,000 Advance Line!



Choose your advance amount

\$30,000



× Basic



✓ Plus


✓ Pro

REAL-TIME PAYMENT SETTLEMENT



When you get paid or pay a bill, let the system update your business reports automatically.

Calvin Warren   

Gladys Smith  

Invoice #	Status	Balance
	Due	\$170
	Paid	\$0

Diane McCoy   

John Pena  

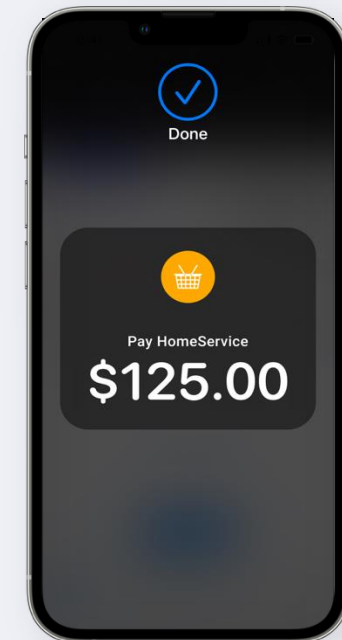
× Basic

✓ Plus

✓ Pro

TAP TO PAY ON IPHONE

Accept contactless payments with only an iPhone.



× Basic

✓ Plus

✓ Pro

The future of SMB Banking = “AB’s CF Bundle” → AR + AP + Accounting w/ C.F. solutions

INTEGRATED ACCOUNTING MODULE

Every transaction inside your checking account is automatically synced with the Autobooks platform.

Description	Matched, Categorized	Notes	Amount
Cost associated with processing ACH payments and related tr...	Matched (2) Income / Sales Retained Ear...	Walbridge family deposit	\$482.50 ***
Fees for ACH services and payments apply.	Income / Sales		\$215.75 ***
ACH transfer costs and fees apply.	Matched (2) Income / Sales Retained Earnings	Refund for faulty part	-\$150.00 ***
Charge for processing ACH transactions and bill payments effectively.	Income / Sales Retained Earnings	Loan transfer - January	\$799.99 ***
ACH transactions incur a transaction fee.	Contractors		-\$45.20 ***

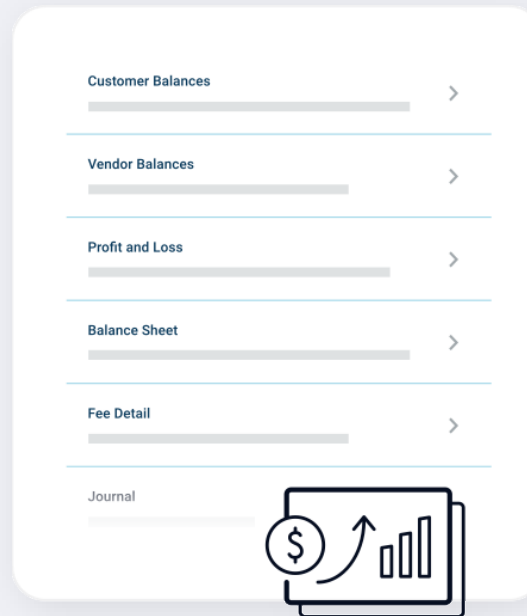
× Basic

× Plus

✓ Pro

FINANCIAL REPORTING

When you get paid or pay a bill, let the system update your business reports automatically.



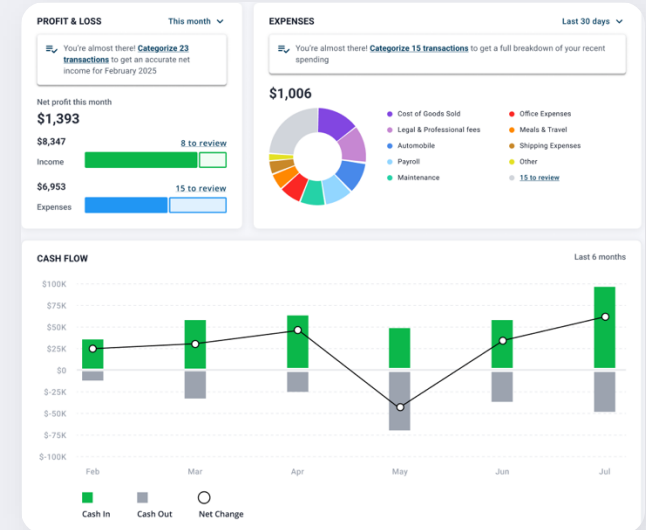
× Basic

× Plus

✓ Pro

CASH FLOW VISUALIZATION

Understand Business Performance at-a-glance



× Basic

× Plus

✓ Pro

POLL:

When evaluating the impact of your Autobooks program, what is the most important metric to your institution?

Enrollment & Testing Preview

Enroll Test User

Access your configuration guide to enable a test user at your institution

- Access our [Partner Page](#)
- Select your digital banking provider
- Locate your configuration guide in the “Configure & Test” section

Let us know when you enroll so we can get you payment enabled

Submit ticket through the Hub or contact fisuccess@autobooks.co

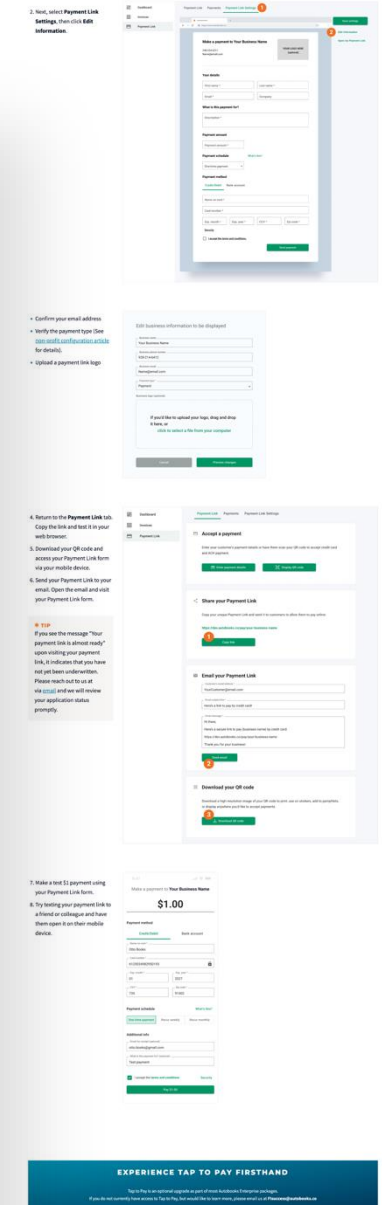
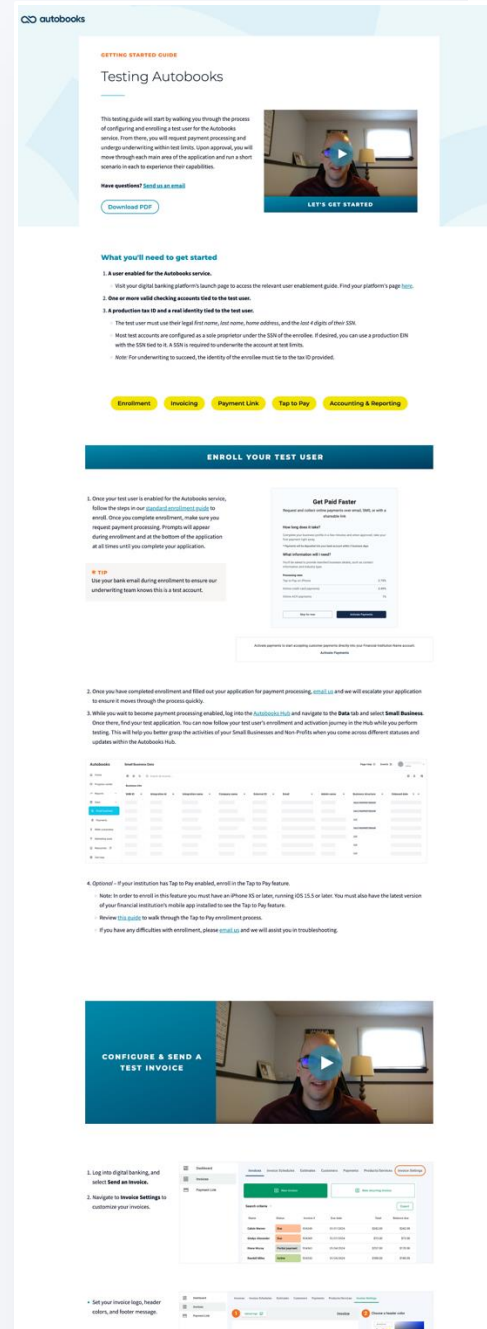
Test the User Experience

Check out the [Getting Started Testing Guide](#) →

Explore Invoicing, Payment Link — including QR Code, URL, and Checkout Pages — and Tap to Pay (if applicable).

Check out the Reporting & Accounting upgrade

Submit ticket through the Hub or contact fisuccess@autobooks.co to request a fee waiver.




A look at the Autobooks Hub

The Autobooks Hub

Your back office and admin portal
for your Autobooks install

[Learn more](#)



Contact Us

AUTOBOOKS HUB TRAINING:

**Serve Your Clients Better,
Interpret Key Data, and
Grow your Autobooks
Program**

**Are you ready to take your Autobooks program to
the next level? Join our upcoming webinar
designed to walk you through the ins and outs of
the Autobooks Hub.**

This session will focus on three key topics:

Serve Your Clients Better

- Equip yourself with the knowledge to assist small businesses and non-profits effectively. From enrollment and underwriting to maximizing application value, we've got you covered.

Interpret Key Data

- Discover how to read and make sense of the data within the Hub. Learn to identify important metrics that drive your Autobooks program.

Grow Your Autobooks Program

- Gain actionable insights on best practices for expanding your Autobooks install. Learn to identify key customers, help them get underwritten, and ensure they find value in your services.

Register now and unlock the full potential of the Autobooks Hub.

Wednesday, OCTOBER 16, 2024
2 p.m. ET / 1 p.m. CT

Register

First name*


Last name*

Email*

Job Title

Company name

Submit





Subscribe to our resources

Email

Submit

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autobooks

Get access to the Hub

Request Admin access to the Hub by completing the [Operational Form](#).

Invite core launch team members into the Hub. [Learn how](#)

The screenshot shows the 'Operational Configuration Form' for 'FINANCIAL INSTITUTION ONBOARDING' on the Autobooks website. The form is titled 'To get started, please provide us with your contact information' and includes fields for 'First name*', 'Last name*', 'Email*', and 'Company name'. Below these are four numbered sections: 1. 'What date do you plan to go live with Autobooks for your customers?' with a 'Launch Date*' field; 2. 'Who has the final approval on the decision to go live with Autobooks?' with 'Approval Contact Name*' and 'Approval Contact Email*' fields; 3. 'Who should be the Primary administrator at your financial institution for the Autobooks Hub?' with 'Autobooks Hub Admin Name*' and 'Autobooks Hub Admin Email*' fields; and 4. 'Who will own the Autobooks product/program at your institution?' with 'Program Owner Name' and 'Program Owner Email' fields. A 'Contact Us' button is in the top right corner.

autobooks

Contact Us

FINANCIAL INSTITUTION ONBOARDING

Operational Configuration Form

We're excited to be partnering with your organization. Please complete the form below to help us best serve your account moving forward.

To get started, please provide us with your contact information

First name*

Last name*

Email*

Company name

1. What date do you plan to go live with Autobooks for your customers?

If Autobooks is already live for your customers enter the date that you launched the solution.

Launch Date*

2. Who has the final approval on the decision to go live with Autobooks?

If Autobooks is already live for your customers, who gave final approval to launch?

Approval Contact Name*

Approval Contact Email*

3. Who should be the Primary administrator at your financial institution for the Autobooks Hub?

Please note, the primary administrator will be able to add additional users once they have been enabled. Also, emails that are tied to distribution lists will not be provided access to the Autobooks Hub.

Autobooks Hub Admin Name*

Autobooks Hub Admin Email*

4. Who will own the Autobooks product/program at your institution?

Program Owner Name

Program Owner Email

Next Steps

Homework

Complete testing user onboarding

- Enroll a test user
- Submit a ticket for payment enablement

Submit operational and profit share forms

Autobooks champion and core launch team should
log into the Hub

LAUNCH
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Starting Your Launch

Meet with Josh

**Review your launch strategy and get
answers to your questions**



Next Steps

Attend Deep Dive & Demo on Thursday

Ride along enrollment and product tour

Invite core launch team to **attend remaining Growth Sprint** sessions

Visit Autobooks Partner site, locate “Configure & Test” section to access your Configuration Guide:
Set up test user and prepare for mass enablement

Thank You!

Let's connect:

jmoreno@autobooks.co