



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

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

LAUNCH
WORKSHOP

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

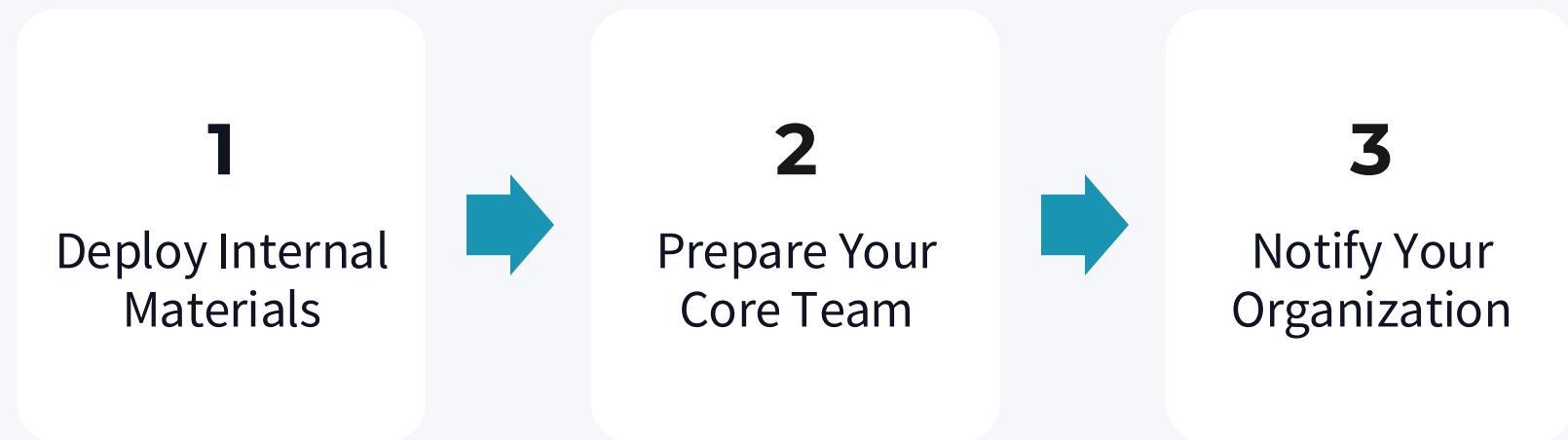
- Attend or review Launch Sprint content
- Test Autobooks
- Access the Hub
- Complete or delegate operational and profit share forms

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 image shows a screenshot of the Autobooks Hub interface. On the left, a sidebar menu includes Home, Progress center, Reports (with a dropdown arrow), Data (with a dropdown arrow), Refer a business, Marketing tools, Resources (with a dropdown arrow), and a prominent blue 'Get help' button. The main content area is titled 'Create a new ticket:' and contains fields for Subject (marked with a red asterisk), Description (marked with a red asterisk), and Category. The Category dropdown is set to 'Autobooks Program Related Requests'. A blue 'Save' button is located at the bottom right of the form.

Create a new ticket:

Subject: *

Description: *

Category: *

Autobooks Program Related Requests

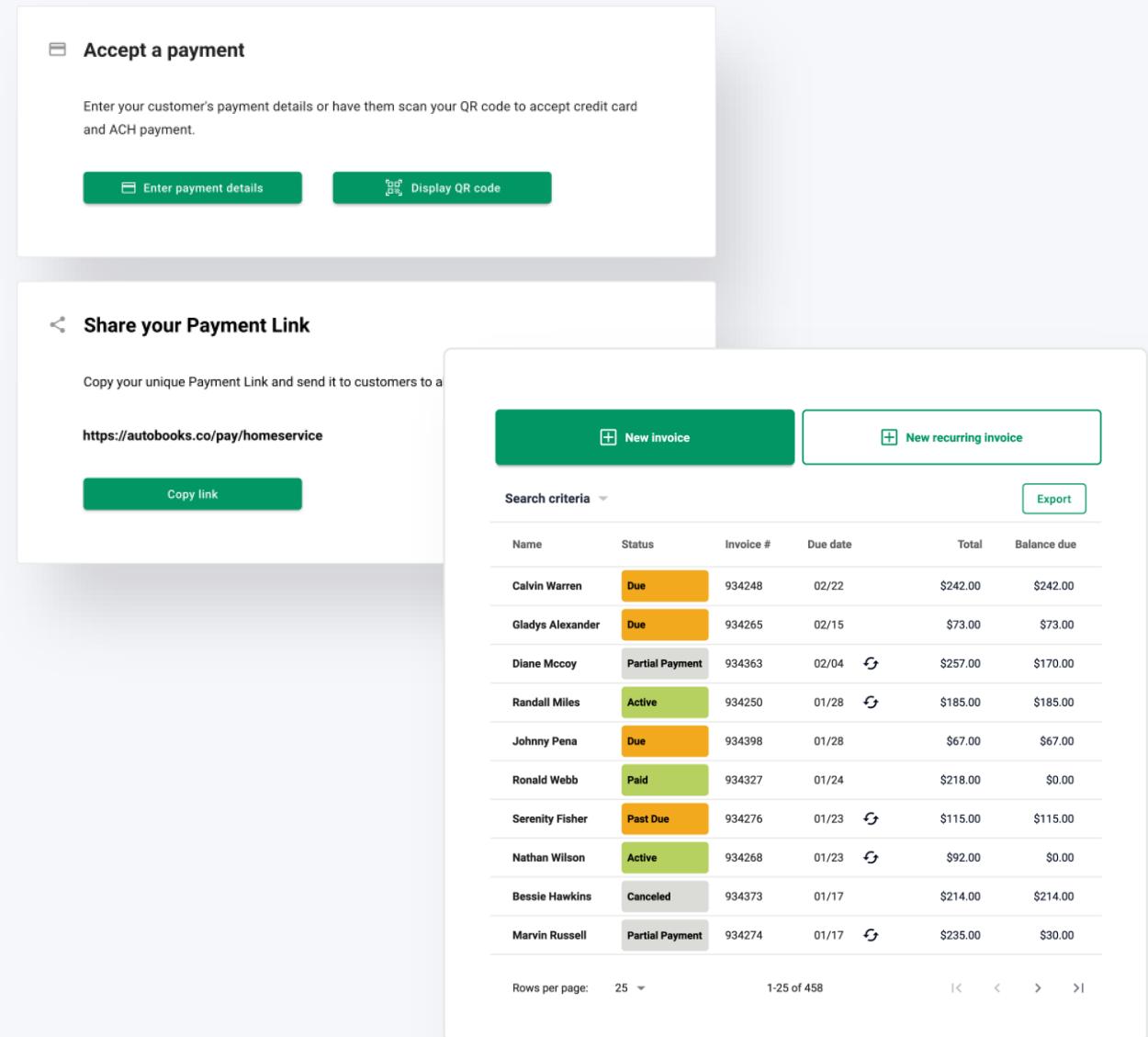
Save

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



The image displays the Autobooks software interface, which includes two main sections: 'Accept a payment' and 'Share your Payment Link'.

Accept a payment: This section allows users to enter payment details or scan a QR code to accept credit card and ACH payment. It features a 'Enter payment details' button and a 'Display QR code' button.

Share your Payment Link: This section provides a unique payment link for customers. The link is <https://autobooks.co/pay/homeservice>. A 'Copy link' button is available to facilitate sharing.

Invoice Management: This section shows a list of invoices with columns for Name, Status, Invoice #, Due date, Total, and Balance due. The invoices are:

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

At the bottom, there are buttons for 'New invoice' and 'New recurring invoice', a 'Search criteria' dropdown, an 'Export' button, and pagination controls for 'Rows per page: 25' and '1-25 of 458'.

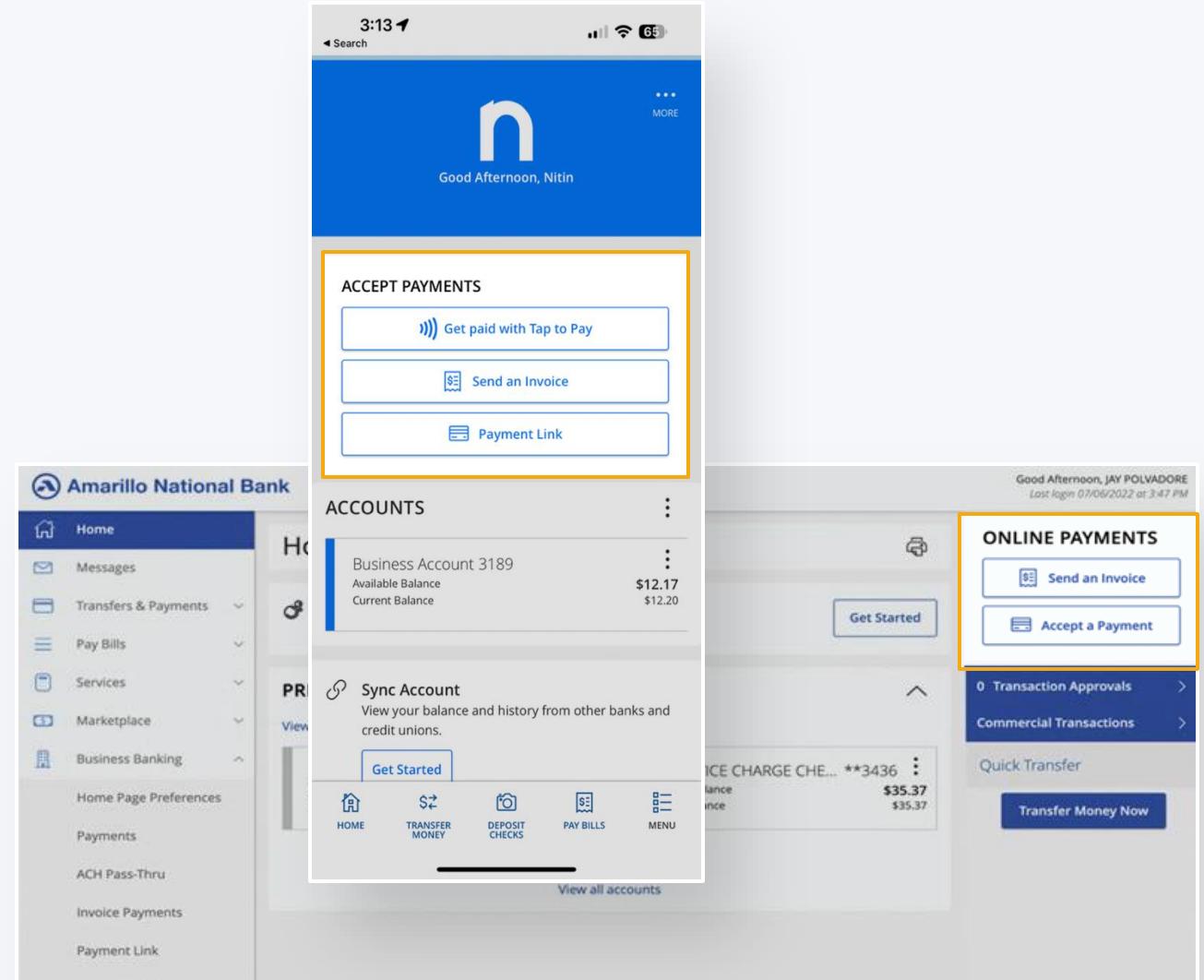
Enrolling in Autobooks: The SMB Journey

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

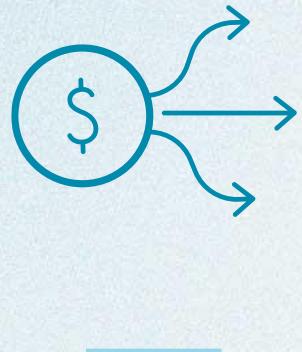


Autobooks handles all underwriting for payment processing and also owns all transactional risk.

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.

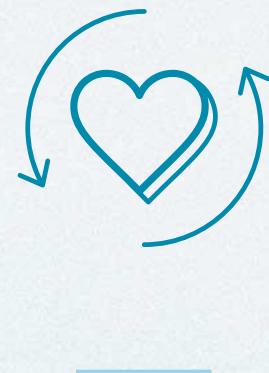
By helping small businesses get paid
(through existing digital banking channels)
a financial institution can:



**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

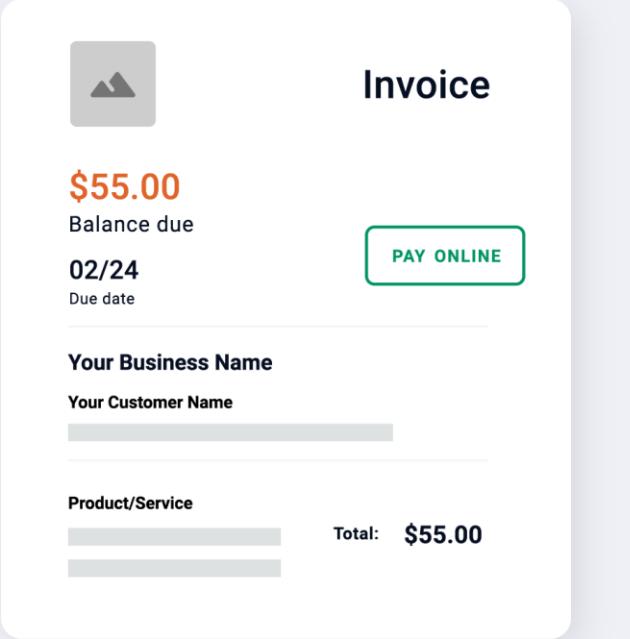
Customer Features

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.



Invoice

\$55.00
Balance due
02/24
Due date

Pay Online

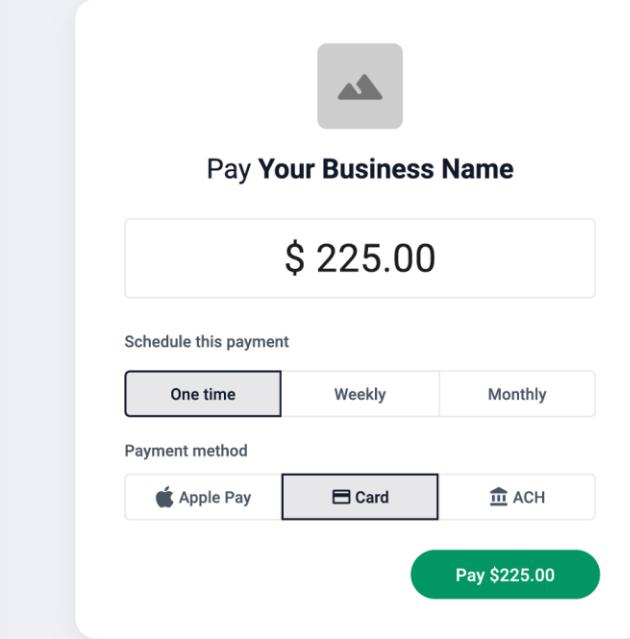
Your Business Name
Your Customer Name

Product/Service
Total: **\$55.00**

Basic **Plus** **Pro**

PAYMENT LINK

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



Pay Your Business Name

\$ 225.00

Schedule this payment
One time **Weekly** **Monthly**

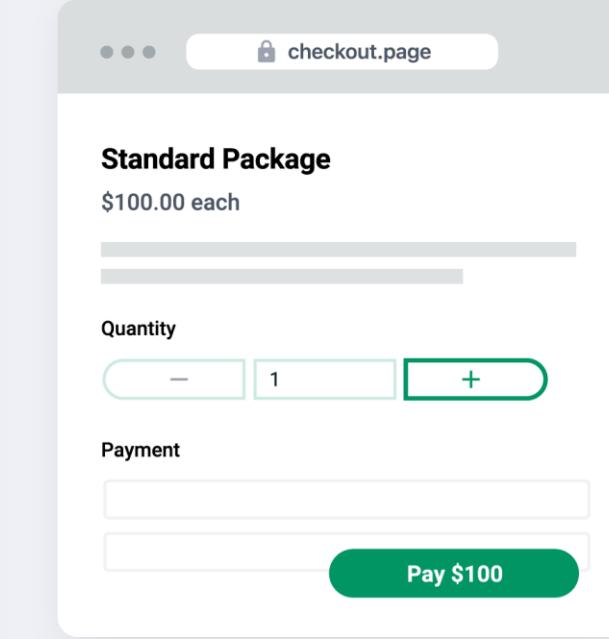
Payment method
Apple Pay **Card** **ACH**

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.



Standard Package
\$100.00 each

Quantity
- 1 +

Payment

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

\$1,000

\$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	Due	\$170
Gladys Smith	Paid	\$0
Diane Mccoy		
John Pena		

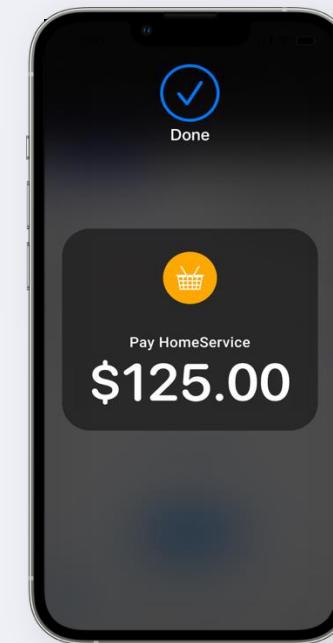
Basic

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 ***

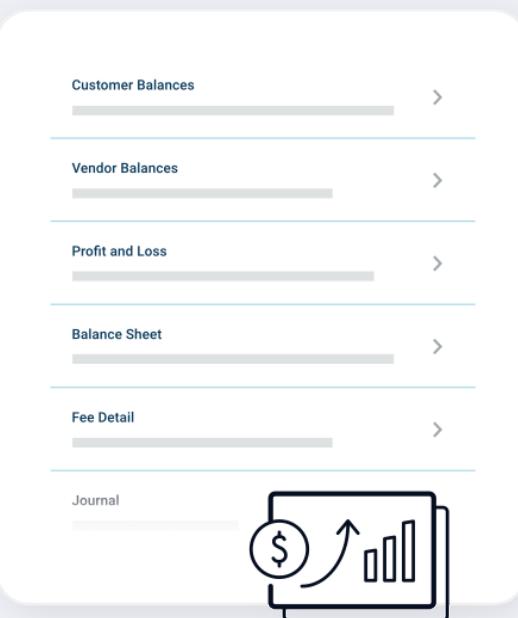
✗ Basic

✗ Plus

✓ Pro

FINANCIAL REPORTING

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



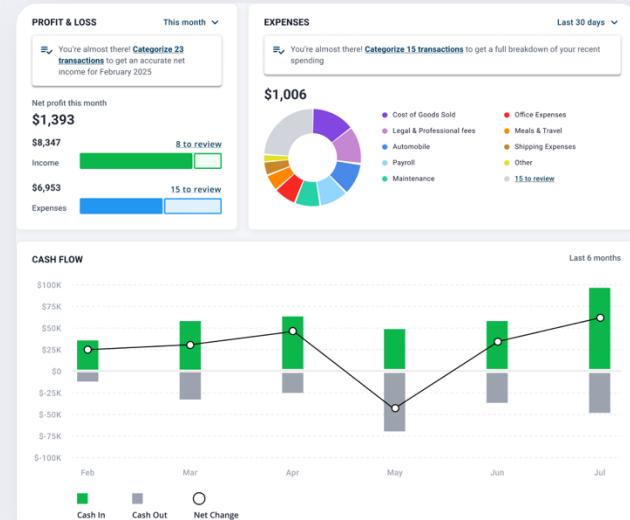
✗ Basic

✗ 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

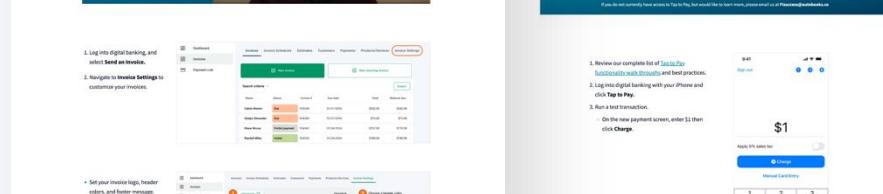
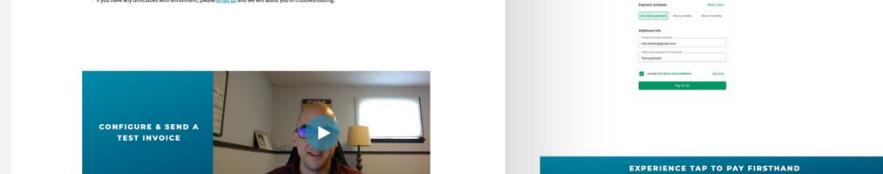
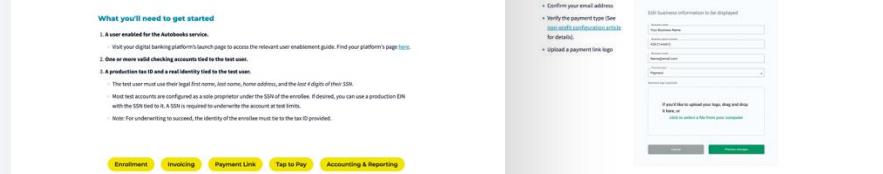
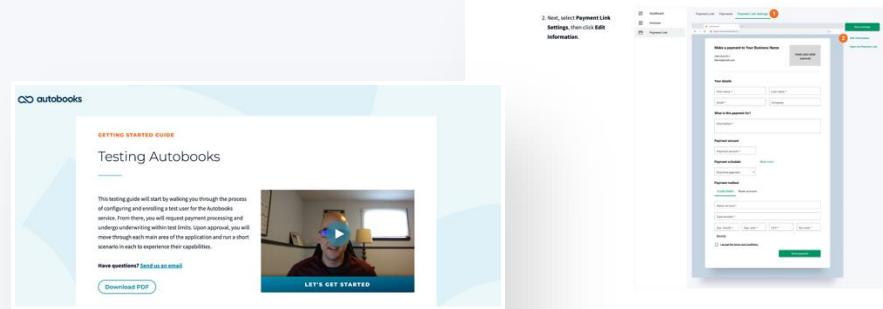
Test the User Experience

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.

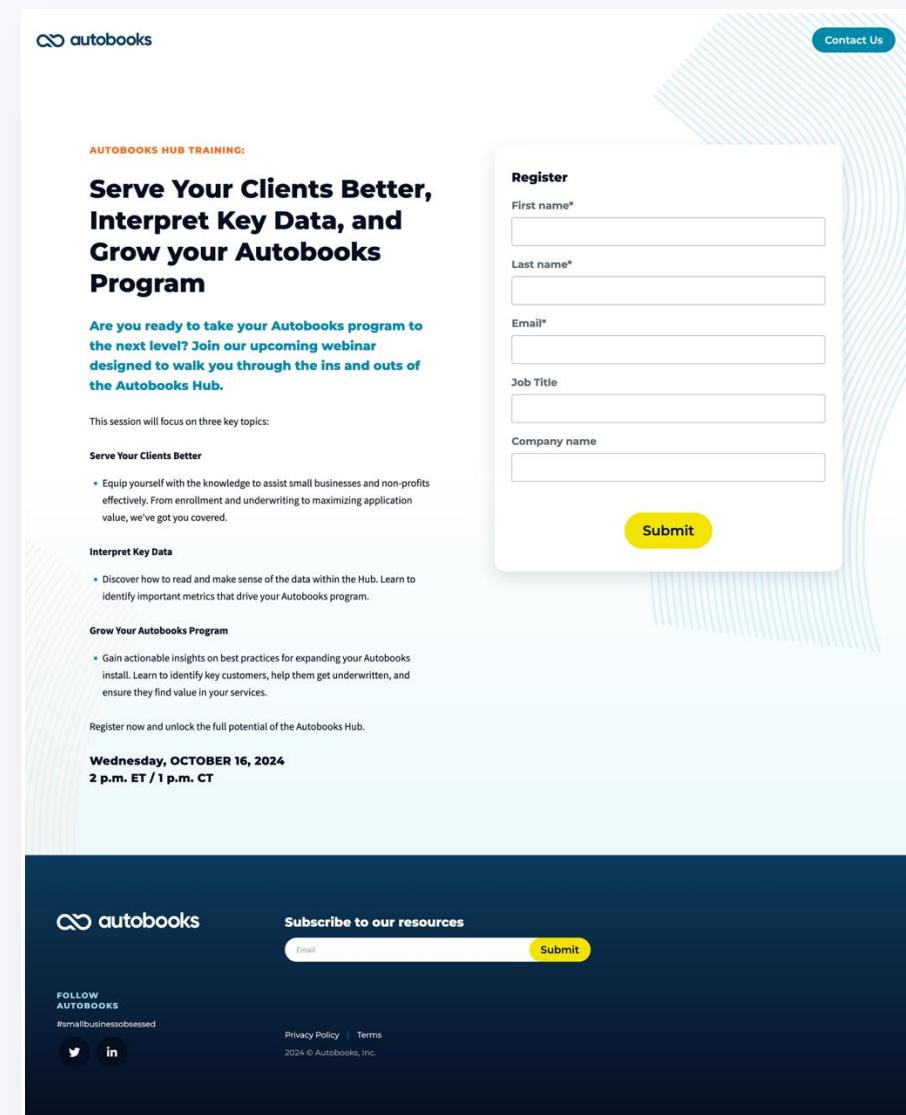


A look at the
Autobooks Hub

The Autobooks Hub

Your back office and admin portal
for your Autobooks install

[**Learn more**](#)

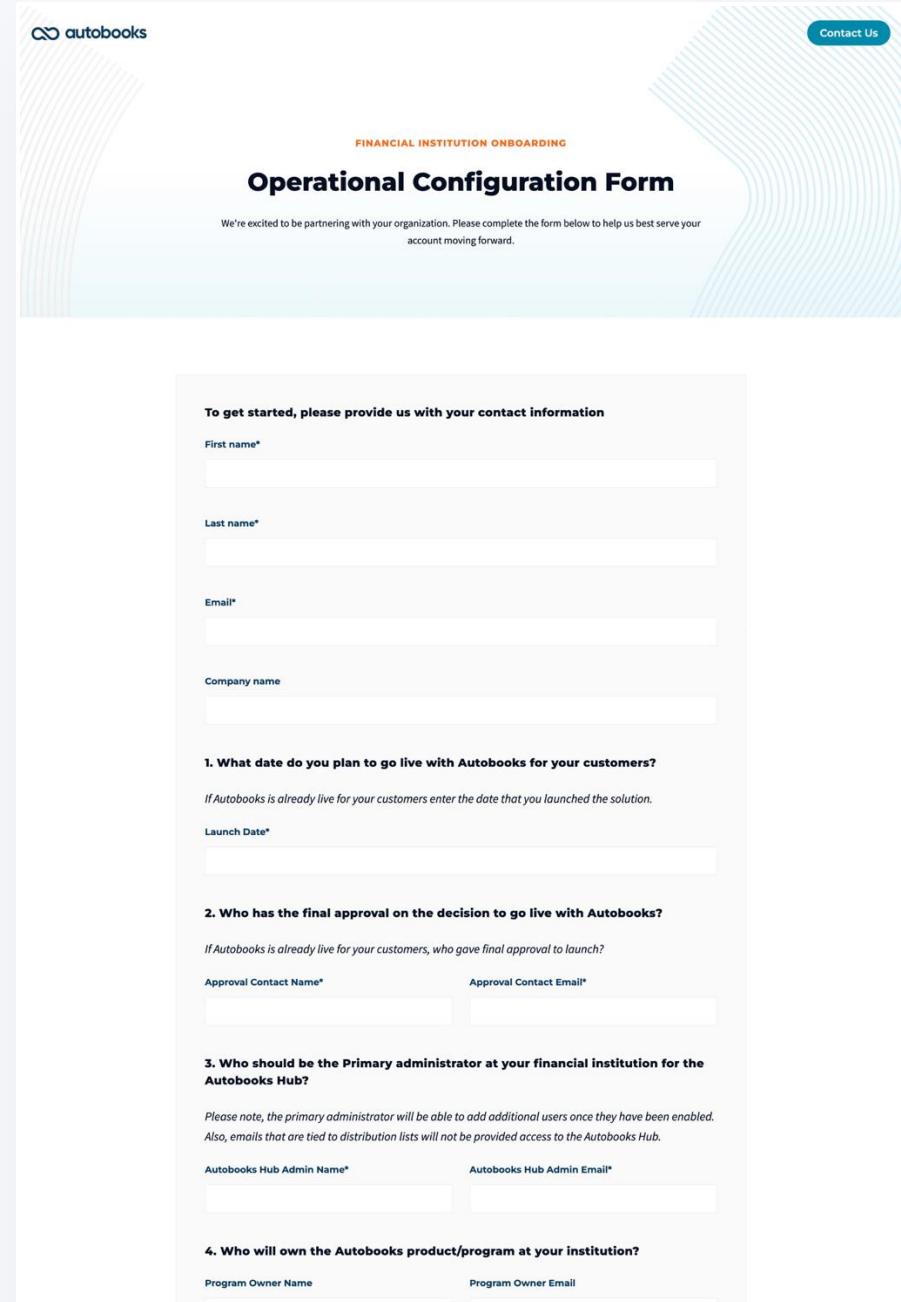


The image shows the Autobooks Hub landing page. At the top right is a 'Contact Us' button. The main heading is 'AUTOBooks HUB TRAINING: Serve Your Clients Better, Interpret Key Data, and Grow your Autobooks Program'. Below this is a sub-headline: 'Are you ready to take your Autobooks program to the next level? Join our upcoming webinar designed to walk you through the ins and outs of the Autobooks Hub.' A note states: 'This session will focus on three key topics: Serve Your Clients Better, Interpret Key Data, and Grow Your Autobooks Program.' Each topic has a list of bullet points. A 'Register' form on the right includes fields for First name*, Last name*, Email*, Job Title, and Company name, with a 'Submit' button. At the bottom is a dark footer with the Autobooks logo, a 'Subscribe to our resources' form, social media links for Twitter and LinkedIn, and links to 'Privacy Policy' and 'Terms'. The footer also includes the text '#smallbusinessobsessed'.

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](#)



autobooks

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

Contact Us

Next Steps

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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
WORKSHOP

Starting Your Launch

Meet with Josh

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



LAUNCH
WORKSHOP

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