Navigating the Autobooks Hub

See the MVP areas of the Hub in action

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What we'll cover

1

What is the Hub

The data it holds and how to use it

2

Leverage Report data

How to access standard reports and ad hoc data

3

Autobooks and beyond

Drive SMB enrollments, use Signals to deepen relationships

4

Resources and Next Steps

Help for your Hub journey

1

What is the Autobooks Hub

The data it holds and how to use it

What the Hub provides

Program view

Every enrolled business, every payment received, every dollar you've earned with your program.

All filterable and exportable.

SMB detail view

One business at a time: Approval status, payment activity, processing limits, and signal opportunities.

Signals

Transaction patterns from the business's account that point to an opportunity, a competitor, or churn risk.

The Hub
Your small business CRM



A lens into how your businesses operate



How businesses get paid



Counterparties businesses are using for competing products

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2

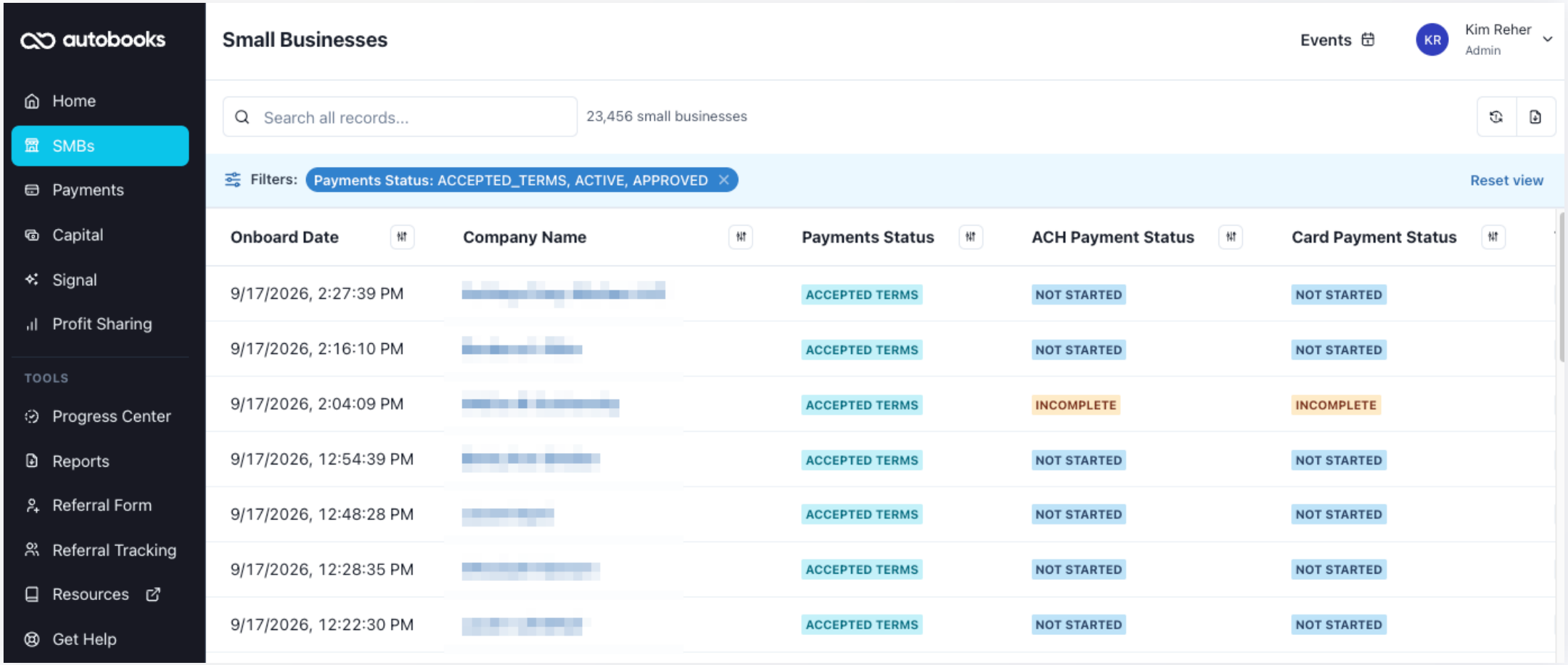
Leverage Report data

How to access standard reports and ad hoc data

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Grow your Autobooks program

Filter the SMB list for Accepted Terms, Approved, and Active in the Payments Status column



Take action

Download your SMB list and distribute to bankers for action. Payment Status terms that bankers can use to drive engagement:

1. **Accepted Terms:**
   - Reach out to the SMB to encourage application completion. Urge them to open Autobooks and complete the enrollment workflow displayed.
2. **Approved:**
   - Reach out to the SMB to encourage use of Autobooks for payments – use our pre-crafted email content.
   - Share the Autobooks Help Center: https://help.autobooks.co
   - Encourage registration/attendance to Autobooks monthly SMB training webinar.

3

Autobooks and beyond

How to use the Hub to deepen relationships with your SMBs

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Use Signals to grow SMB relationships beyond Autobooks

Signals are banking transactions from your small business customers that have accepted Autobooks' terms and conditions. Signals indicate outreach opportunities, customer churn risk, and surface third party competitors.

The data is already in your institution.
The Hub reads it and labels the opportunity.

WORTH KNOWING

The Signal tab is available for all institutions using the Hub. There is nothing to configure and nothing to request.

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Signal Types

Opportunity

A chance to widen or deepen the customer relationship

Includes:

- Third-party cards or loans
- Third-party payroll payments
- Deposits from third-party payment processors

Risk

A customer relationship under threat

Includes:

- Funds transferred to a competing FI
- NSF/overdraft stress
- Payments to a third-party investment company

Milestone

Moments worth customer outreach to strengthen relationships

Includes:

- First payments thru Autobooks
- First invoice sent
- Notable Autobooks activity

Notable

Context worth knowing

Includes:

- Wire activity
- Large balance movements
- Tax payments

Signals tab is visible to FI Admin and read-only users.

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Top Actionable Signals

Third party lending

A business is borrowing money from a competitor. Reach out to bring those dollars back to the FI.

Outside processor volume

Revenue running through a third party. Lead with your rates.

Third party credit card use

The business is using external credit cards. Reach out to offer in-house credit or debit cards.

Cash and check deposits

Deposits that could be electronic. An invoicing and payment link conversation.

First payment taken

Worth congratulating, and valuable to strengthen banker/customer relationships.

Best practice in action

THE SITUATION

You’re tasked with increasing the number of credit card accounts for your business customers.

HOW THE HUB CAN HELP

Filter your Signal Feed to show Opportunities > Third party cards

WHAT YOU CAN DO, AND THE RESULT

1. Download your filtered Signal Feed list.
2. Distribute the customer lists to your bankers for outreach and credit card promotion to win that account from third-party competition.

BONUS ACTION

Filter your Signal Feed to target third-party loans as well to win back valuable lending relationships.

4

Resources and Next Steps

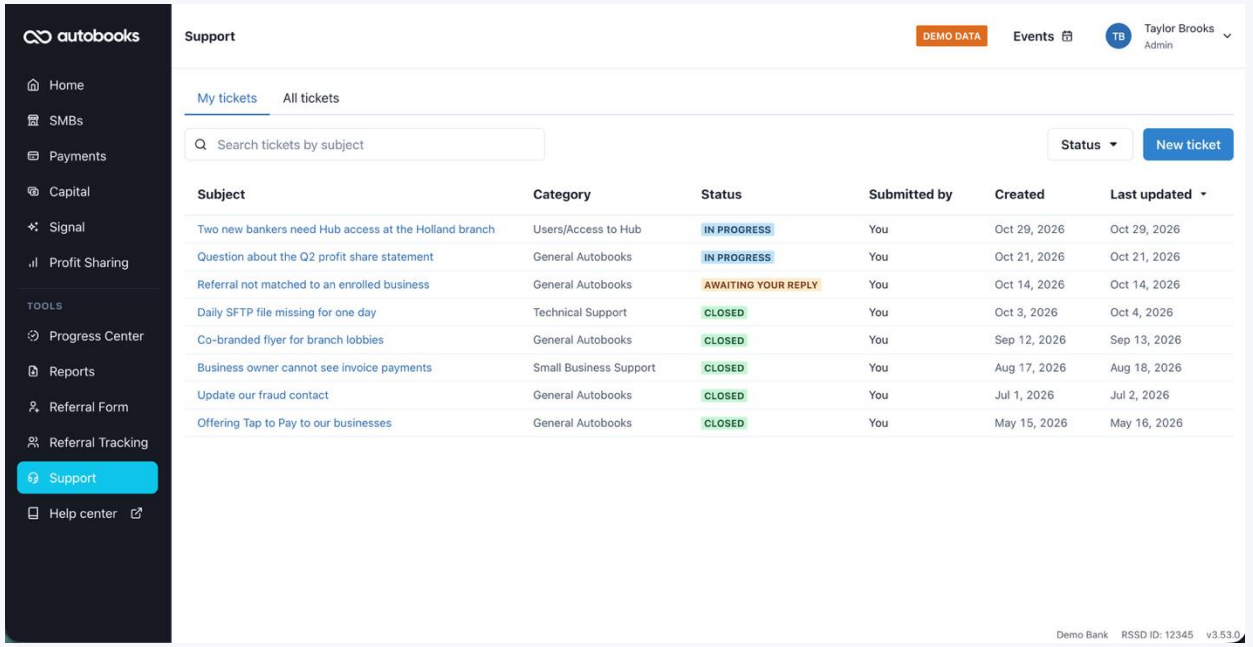
Help for your Hub journey

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Create a Support ticket in the Hub

WHAT YOU CAN DO

- Create new tickets for Autobooks Support assistance; attach screenshots when needed
- Correspond to our Support team through your ticket
- See all tickets for your team



BEST PRACTICE

Open Autobooks tickets in the Hub! Emails to FI Success will not show in your Hub ticket history and aren’t as easily traced.

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NEXT STEPS

Your next 30 days

WEEK 1

Log in

- Confirm access
- Add your users
- Walk the navigation with the team.

WEEK 2

Build the view

Export your first list: approved, no payment taken.

WEEK 3

Send one round

Take the matching email from our resource kit, add your details, send it, and log who was contacted.

WEEK 4

Report it

Pull the 30-day payment report, send it to your sponsor, and tee up the next action list.

Where to go next

GET HELP

Create a Support ticket inside the Hub

Autobooks Partner Success Center:
https://banking-help.autobooks.co

Autobooks Success: FISuccess@autobooks.co

RESOURCES

Signal Feed Email Kit

Industry resource kits

Training resources

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