

Welcome!
Monthly Hub
Training



Agenda

1. Autobooks Hub overview
2. Autobooks Hub platform training and best practices
3. Operationalizing the Autobooks Hub
4. Hub Demo

Looking to get started with Autobooks?

Head to autobooks.co/partners to view all our launch resources

Level Set

MONTHLY WEBINAR: Making the Most of the Autobooks Hub

learn.autobooks.co/hub-webinar

The screenshot shows a registration page for an Autobooks webinar. At the top left is the Autobooks logo, and at the top right is a 'Contact Us' button. The main heading reads 'Support your businesses and grow your Autobooks program with the Autobooks Hub'. Below this, a sub-heading asks if the user is new to the Autobooks Hub or looking to refresh their knowledge, stating the session is for them. A paragraph describes the webinar content: learning from the FI Growth team about interpreting data in the Autobooks Hub, helping small businesses and non-profits, and daily or weekly best practices. The date and time are listed as Wednesday, August 14, 2024, at 2 p.m. ET / 1 p.m. CT. A registration form titled 'Register' includes fields for First name*, Last name*, Email*, Job Title, and Company name, followed by a yellow 'Submit' button. The footer contains the Autobooks logo, a 'Subscribe to our resources' section with an email field and a yellow 'Submit' button, social media links for Twitter and LinkedIn, a 'Privacy Policy' link, and a copyright notice for 2024 © Autobooks, Inc.

autobooks

Contact Us

AUTOBOOKS WEBINAR:

Support your businesses and grow your Autobooks program with the Autobooks Hub

New to Autobooks or the Autobooks Hub? Looking to refresh your knowledge on the Autobooks Hub? This session is for you!

Come join our FI Growth team to learn how to interpret the wealth of data you have in the Autobooks Hub, how to help small businesses and non-profits make progress, and what the best practices are that you should be doing on a daily or weekly basis.

**Wednesday, August 14, 2024
2 p.m. ET / 1 p.m. CT**

Register

First name*

Last name*

Email*

Job Title

Company name

Submit

autobooks

Subscribe to our resources

Email

Submit

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- Overview of the Autobooks Hub tools
- How to put the Autobooks Hub to work serving your Small Businesses and Non-Profits
- Perfect for teams looking to prepare themselves for launch and/or growing your Autobooks program.

THE AUTOBOOKS HUB: Your Back Office for your Autobooks Program

- Manage your program
- Grow your program
- Support your customers
- Report on progress



AUTOBOOKS HUB

Your command center for small business growth.

Track the impact of your Autobooks program, monitor and support small business activity, download reports, and more.

beta-producthub.autobooks.co

Poll Question:

How is your team
using the Hub today?

Who uses the
Autobooks Hub?

Two Categories of Autobooks Hub Users

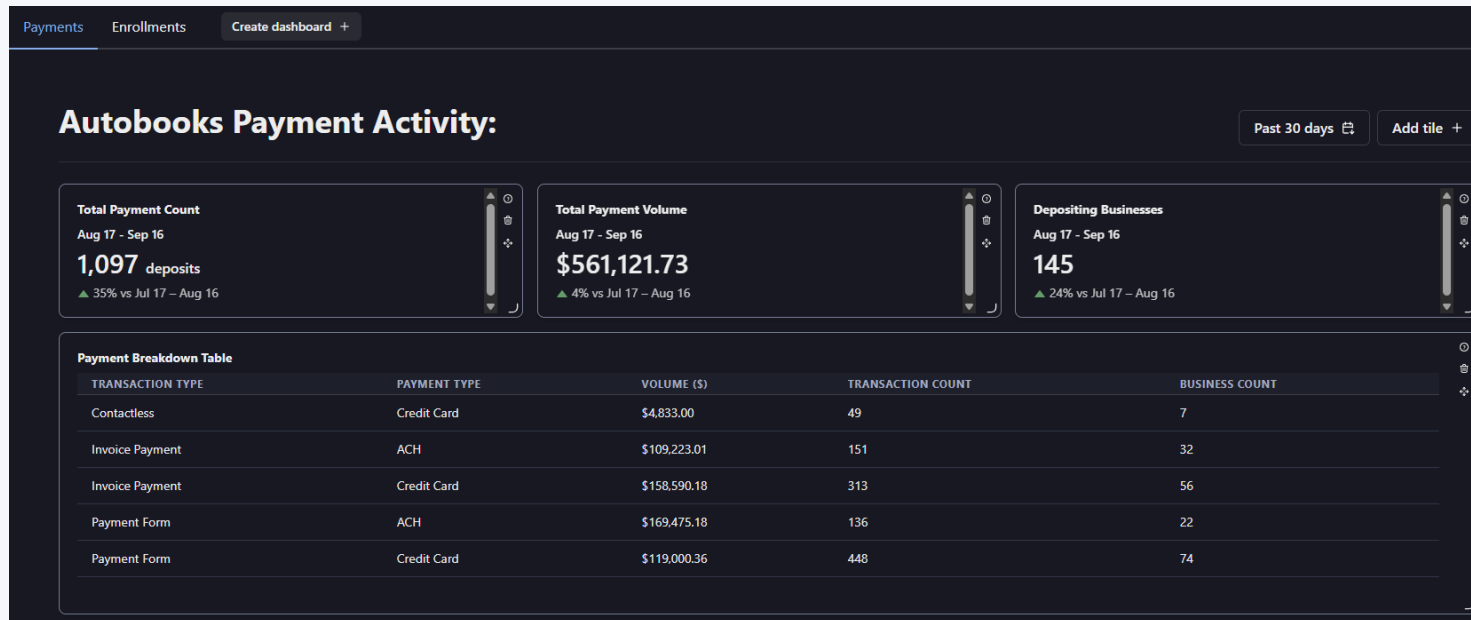
Program / Product Owners

Program & product
performance

SMB Facing Team Members

SMB experience & problem
solving

Autobooks Program Owners



Recommended user type: FI Admin

- Monitor program trends and performance
- Measure impact of growth initiatives
- Profit share reporting
- Create reports for stakeholders

Most useful tools for the role:

1. Main dashboard
2. Reports tab > view reports
3. Custom dashboards

SMB Facing Team Members

Recommended user type: Read-Only

- Monitor SMB Status and progress
- Help SMB's get underwritten
- Submit escalations on behalf of SMBs
- Help SMB's get paid

Most useful tools for the role:

1. Data > Small Business tab
2. Progress Center
3. Get Help

The screenshot displays the 'Get help' section of the Autobooks application. On the left is a sidebar with navigation options: Home, SMBs, Payments, Capital, Signal, Profit Sharing, and a 'TOOLS' section containing Progress Center, Reports, Referral Form, Referral Tracking, Resources, and 'Get Help' (which is highlighted). The main content area is titled 'Create a new ticket:' and contains a form with the following fields: 'Subject: *' (text input), 'Description: *' (text area), and 'Category: *' (a dropdown menu currently showing 'Autobooks Program Related Requests'). A green 'Save' button is located at the bottom right of the form. Below the form is a table with the following headers: STATUS, TICKET, CREATED, and LAST UPDATED. The table body shows the text 'Current support tickets'.

Hub Habits:

What do our most
successful FI Partners do?

Daily Habits

Recommended for **SMB facing team members**

Review SMBs in the “Incomplete” stage

Use the progress center to complete their applications or contact via email

Review SMBs in the “Under Review” stage

Review and submit missing info for SMBs in Under Review stage for more than 24 hours

Help your SMBs get help

Direct SMBs to Autobooks Support for product related questions (866-617-3122)

Submit a ‘Get Help’ ticket if your SMB is unable to get assistance or resolution for any reason

Weekly Habits

Recommended for **Program & Product Owners**

Compare week over week statistics

Accepted Terms

Approved

Activated

Reach out

Send a welcome note to
approved but not yet active
(paid) SMBs

Bring your Autobooks data into your systems

The Autobooks SFTP allows you to pipe your Autobooks program data directly into your system

Use the SFTP feed to:

- Add Autobooks usage data to your CRM
- Populate your core with Autobooks enrollments and users
- Power an internal incentive program
- Add Autobooks data to your account analysis process

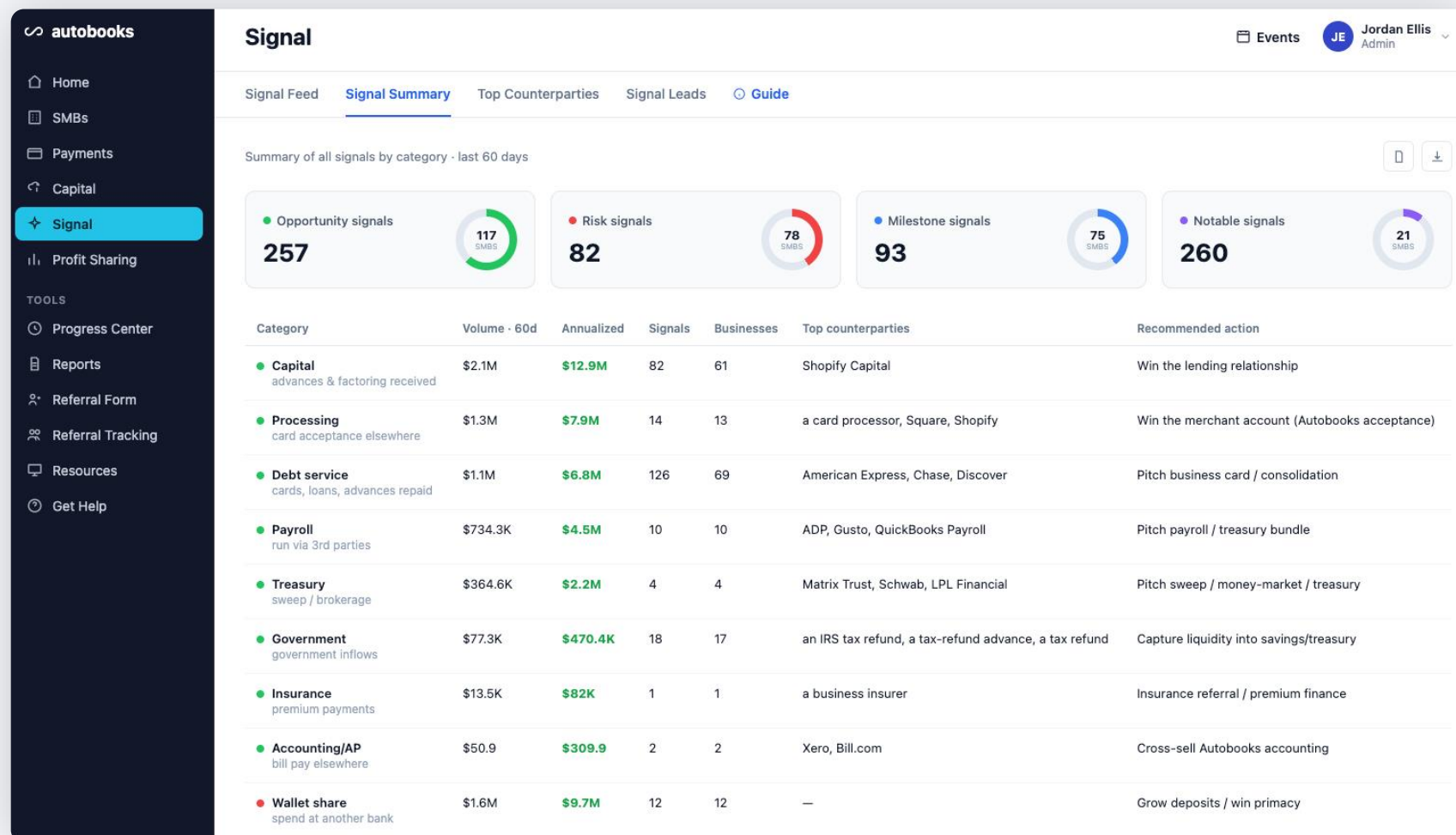
**LEARN HOW TO CONFIGURE YOUR
FEED IN THE [KNOWLEDGE BASE](#).**

Autobooks Hub Enhancements

Signal Feed Upgrades

- New signals tiles
- Re-organized for easier reading
- Updated tabs across the top

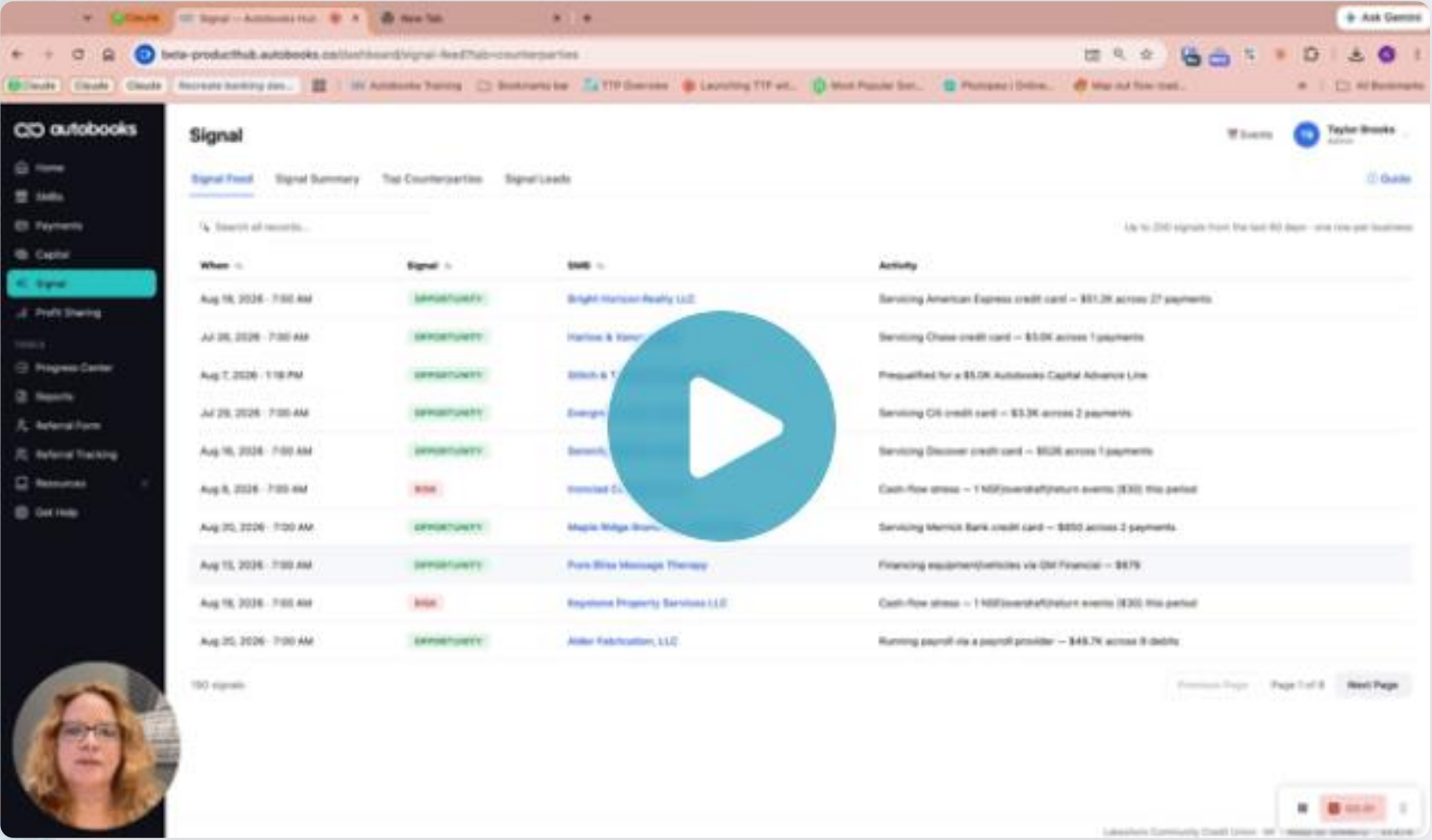
[Learn More Here](#)



Learn More About the Signal Feed

- Learn how you can make use of the signal feed
- Put the new features of the signal feed to work growing and retaining your SMB relationships

Watch here



The screenshot displays the Autobooks Signal Feed interface. On the left is a dark sidebar with navigation links: Home, Alerts, Payments, Capital, Signal (highlighted), Profit Sharing, Tools, Progress Center, Reports, Referral Form, Referral Tracking, Referrals, and Get Help. The main content area is titled 'Signal' and includes tabs for Signal Feed, Signal Summary, Top Counterparties, and Signal Leads. Below these is a search bar and a table of signals. A large blue play button is centered over the table. The table has columns for When, Signal, SMB, and Activity.

When	Signal	SMB	Activity
Aug 16, 2026 - 7:00 AM	OPPORTUNITY	Bright Horizon Realty LLC	Servicing American Express credit card -- \$51.0K across 27 payments
Jul 26, 2026 - 7:00 AM	OPPORTUNITY	Harline & Vance	Servicing Chase credit card -- \$5.0K across 1 payments
Aug 7, 2026 - 1:00 PM	OPPORTUNITY	Stitch & T	Prequalified for a \$5.0K Autobooks Capital Advance Line
Jul 26, 2026 - 7:00 AM	OPPORTUNITY	Exangri	Servicing Citi credit card -- \$5.3K across 2 payments
Aug 16, 2026 - 7:00 AM	OPPORTUNITY	Sevensh	Servicing Discover credit card -- \$0.0K across 1 payments
Aug 9, 2026 - 7:00 AM	RISK	Tronixal Co.	Cash-flow stress -- 1 NSF/overdraft/return events (330) this period
Aug 30, 2026 - 7:00 AM	OPPORTUNITY	Maple Ridge Home	Servicing Mercat Bank credit card -- \$0.0K across 2 payments
Aug 15, 2026 - 7:00 AM	OPPORTUNITY	Pure Bliss Massage Therapy	Financing equipment/vehicles via Get Financial -- \$675
Aug 16, 2026 - 7:00 AM	RISK	Regence Property Services LLC	Cash-flow stress -- 1 NSF/overdraft/return events (330) this period
Aug 30, 2026 - 7:00 AM	OPPORTUNITY	Arbor Fabrication, LLC	Running payroll via a payroll provider -- \$49.7K across 8 debts

150 signals

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Autobooks Community Cloud Connect

Want to discuss?

BOOK NOW

[Meet with Josh](#)



Autobooks Hub:
Dashboard &
Tools Demo

Connect with Autobooks

autobooks.co/partners

Let's connect:

Email: FISuccess@autobooks.co