

# Autobooks Self-Service Enrollment



Send an Invoice



Accept a Payment

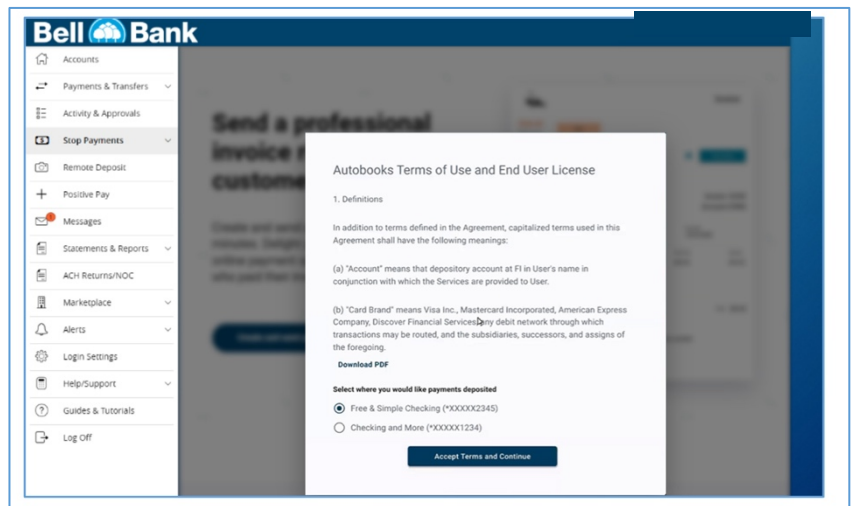


Autobooks offers simple, self-service enrollment online. To get started, the **System Manager** should simply login to bell.bank and navigate to **Marketplace**, and Autobooks options will be displayed. **System Managers** can self-enroll in Autobooks 24 hours a day, 365 days a year.

## Step-by-step enrollment process:

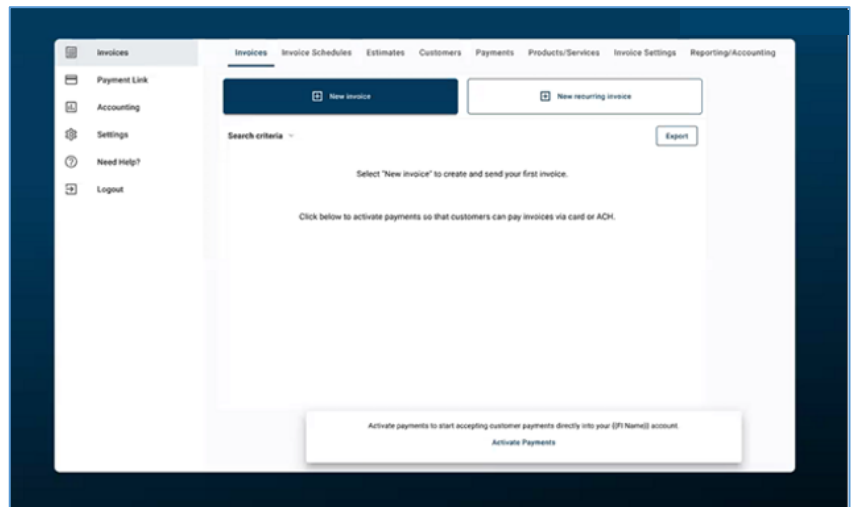
### Step 1:

Click on **Marketplace** within online banking, or on one of the **Accept Payments** buttons on the right. The Terms and Conditions will display and allow the **System Manager** to select which Bell Bank checking account the funds should be deposited into.



### Step 2:

You will then be able to navigate to Autobooks to determine if it is the right solution for you. After you decide to use Autobooks, click the **Activate Payments** link on the bottom of the screen.



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## Step 3:

Review the information on this page and click **Get Started**.

Activate payments on your account!

Verify your business information in minutes and apply to start accepting card and ACH payments into your Default/Q2 Non-MP Test account. **Please provide only primary business owner information.**

Do you process over \$35,000 a month? Reach out to [success@autobooks.co](mailto:success@autobooks.co) for discounted rates.

Processing rates	
Tap to Pay on iPhone	2.75%
Online credit card payments	3.49%
Online ACH payments	1%

If you have questions, email [support@autobooks.co](mailto:support@autobooks.co) or call us toll-free at (866) 617-3122

**Get Started**

## Step 4:

Fill out the requested information. This will kick off the Autobooks merchant application process. After the Autobooks review has been completed, you will be able to accept payment with full invoicing and payment form functionality.

What's the largest payment you expect to receive?

Largest Payment \*  
\$0  
This is just an estimate. Payments could be from investing, donations, or however else you expect to receive income.

Ask me later Save

What's your estimated annual revenue?

Annual revenue amount \*  
\$0

Ask me later Save

What's your business structure and title?

Structure \*  
Title \*

Please select a Structure

Ask me later Save

Once enrollment is complete, the **System Managers** can upgrade their Autobooks experience with additional features. To add **Accounting, Reporting and other features**, you can purchase the subscription from Marketplace within online banking for \$9.99 a month.

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The screenshot displays the Bell Bank Autobooks dashboard. The left sidebar contains navigation options: Dashboard, Invoicing, Payment Form, Vendors, Accounting, Reports, Settings, Need Help?, and Logout. The main content area is divided into two tabs: 'Customer payments' (selected) and 'Vendor payments'. Under 'Customer payments', there are three summary cards: 'Incoming payments' at \$0.00, 'Coming due' at \$10.00, and 'Past due' at \$5.00. Below these is a 'Payment Form' section with a link to <https://app.autobooks.co/pay/> and a 'Copy' button. A 'Summary of last month's invoicing activity' section shows that \$2.03 in invoices were sent. On the right, a 'Customer payment totals' table shows month-to-date (\$0.00) and year-to-date (\$4.10) totals. A 'Total cash' section lists account balances: Business Checking (\*7718) at \$15.79, Premier Business Checking (\*7734) at \$12.48, and Regular Savings-Business (\*0639) at \$16.12.

Customer payment totals	
Month-to-date	\$0.00
Year-to-date	\$4.10

Total cash	
Business Checking (*7718)	\$15.79
Premier Business Checking (*7734)	\$12.48
Regular Savings-Business (*0639)	\$16.12

If you have any questions, contact our digital services team at [866-221-1136](tel:866-221-1136) and choose option 2 (technical support) to learn more.

Thank you for being our customer. We're excited to continue to enhance your mobile and online banking experience with Bell!