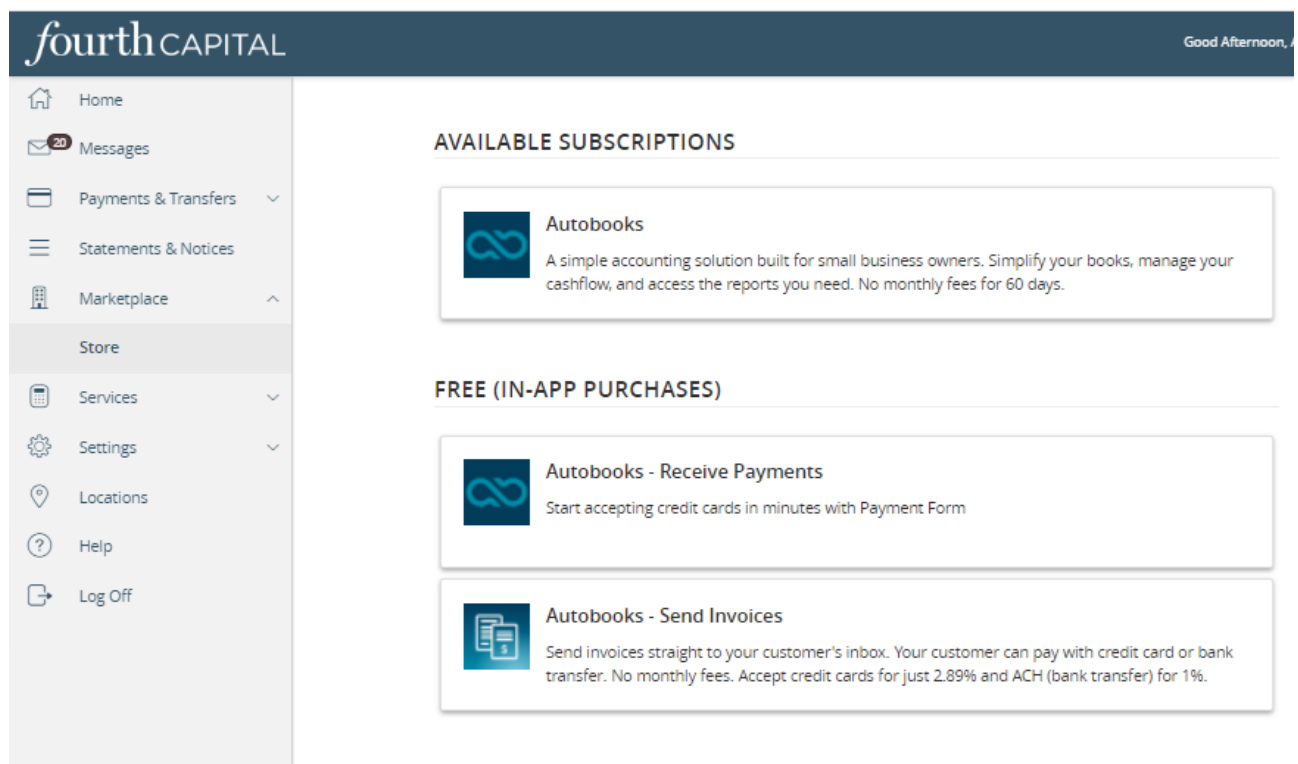


Autobooks Enrollment from Fourth Capital's Digital Banking Marketplace

Autobooks offers simple, self-service enrollment online within Fourth Capital's digital banking platform. To get started, login to access your account using your current digital banking credentials. You can then subscribe to an Autobooks app within the Marketplace. Begin by clicking on the app of choice:



The screenshot displays the Fourth Capital digital banking platform interface. The top navigation bar features the "fourthCAPITAL" logo on the left and a greeting "Good Afternoon, ..." on the right. A left-hand sidebar menu lists various navigation options: Home, Messages (with a 20 unread message indicator), Payments & Transfers, Statements & Notices, Marketplace, Store, Services, Settings, Locations, Help, and Log Off. The main content area is divided into two sections: "AVAILABLE SUBSCRIPTIONS" and "FREE (IN-APP PURCHASES)".

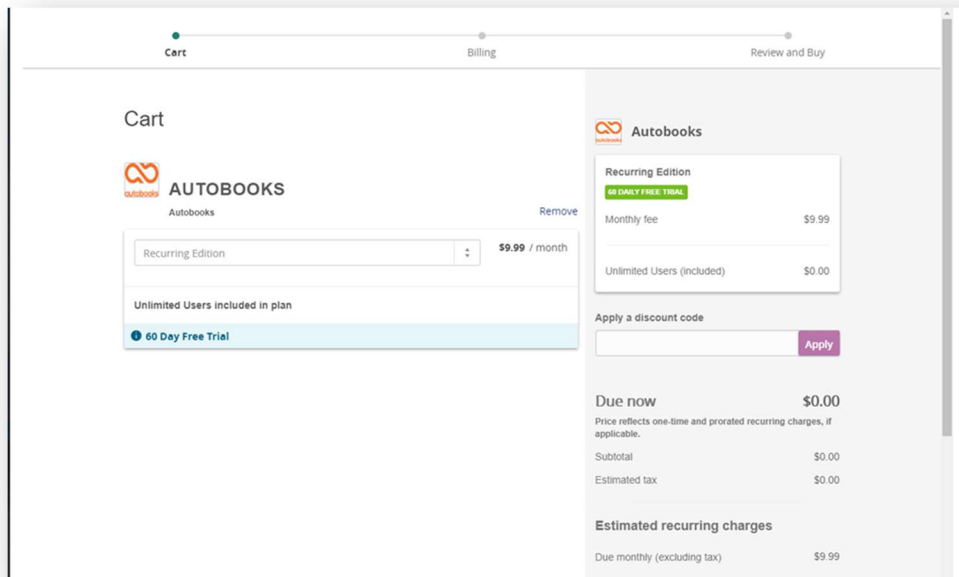
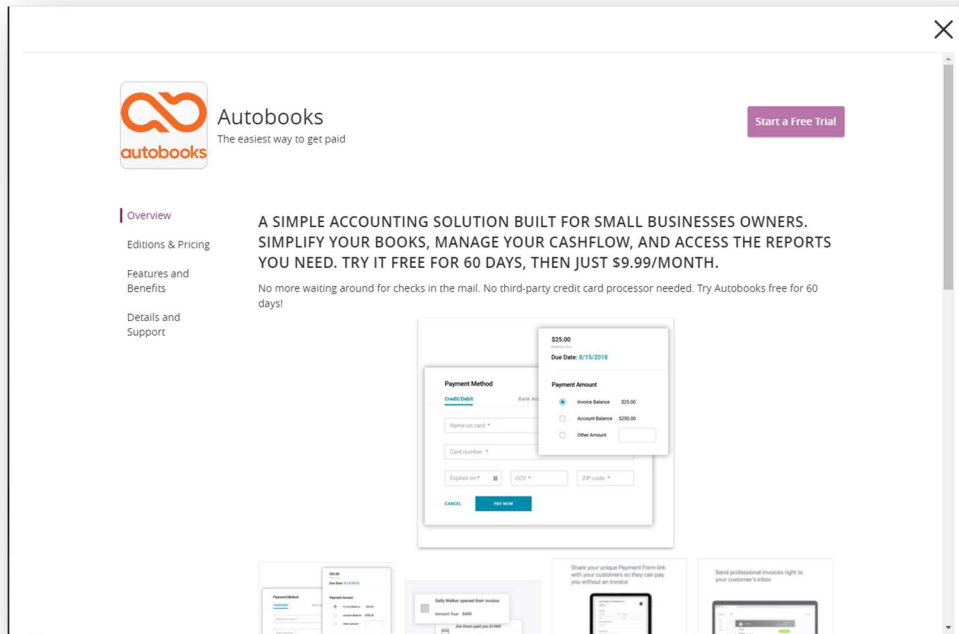
AVAILABLE SUBSCRIPTIONS

- Autobooks**
A simple accounting solution built for small business owners. Simplify your books, manage your cashflow, and access the reports you need. No monthly fees for 60 days.

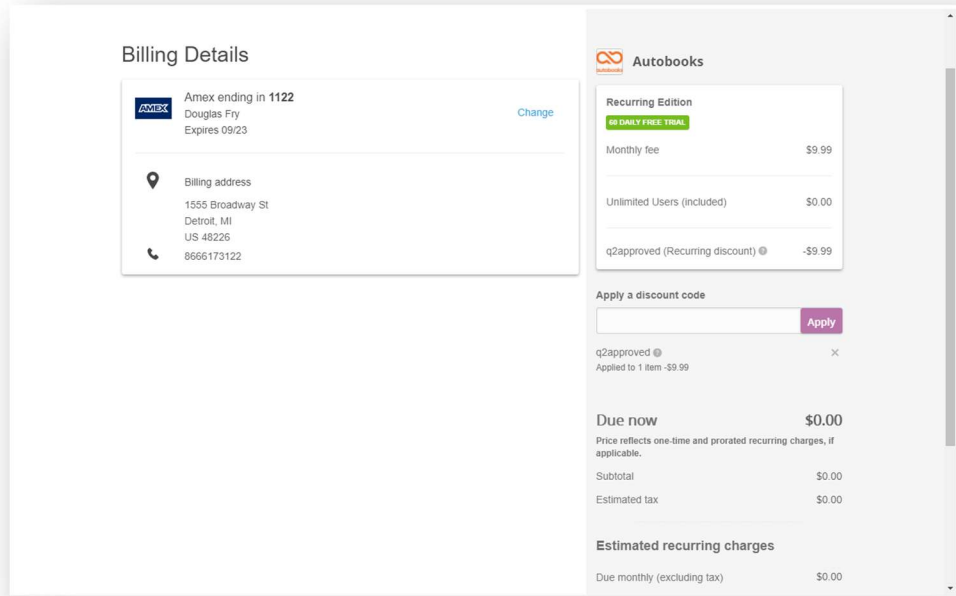
FREE (IN-APP PURCHASES)

- Autobooks - Receive Payments**
Start accepting credit cards in minutes with Payment Form
- Autobooks - Send Invoices**
Send invoices straight to your customer's inbox. Your customer can pay with credit card or bank transfer. No monthly fees. Accept credit cards for just 2.89% and ACH (bank transfer) for 1%.

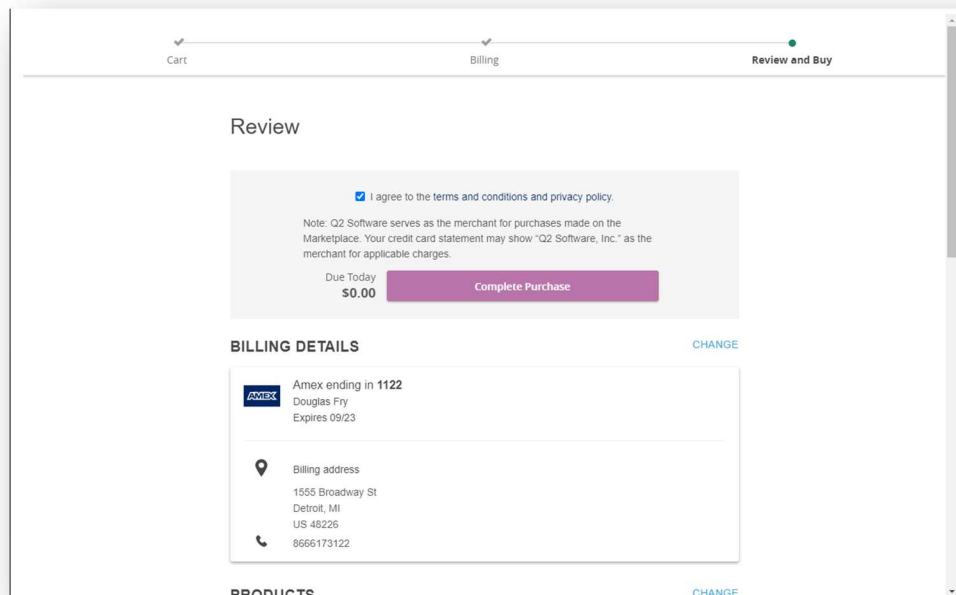
Then follow the Marketplace app subscription process:



You will be required to input a credit or debit card number for any future in-app purchases:

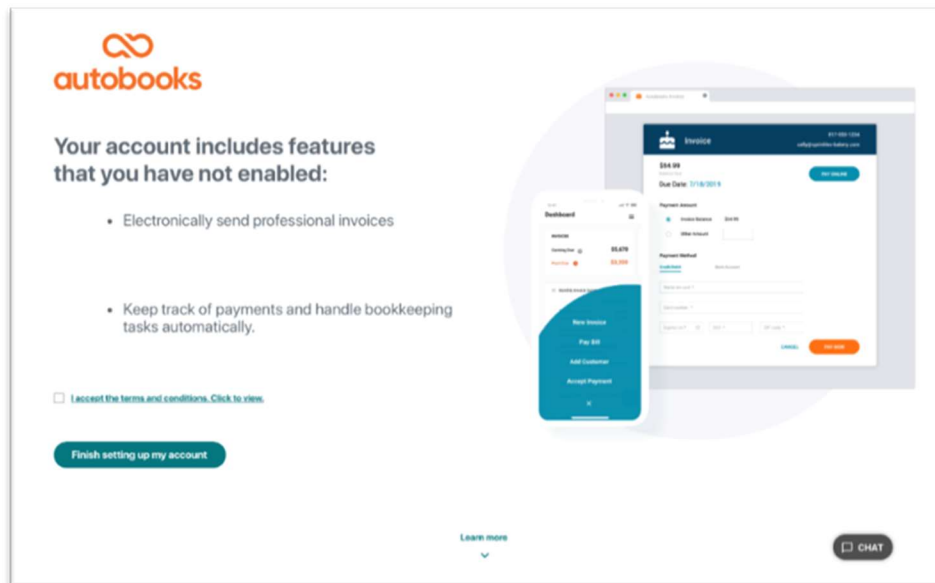


The final step is for you to review your app selection and click the Complete Purchase button:



Here's a step-by-step guide on the Autobooks enrollment process:

Step 1: Once app has been purchased: accept Terms and Conditions to begin enrollment, then click 'Finish setting up my account'.



Step 2a: Provide information about your business so we can create your account within Autobooks.

Sign Up For Autobooks

● ● ●

Please confirm the Primary Business Owner information below.
If the information displayed is incorrect, or is missing, please provide updated information.

First Name * John	Last Name * Smith
Email * John@AUTOBOOKS.CO	Phone * 586-444-4444
Date of Birth * 04/04/1975	
SSN * XXX-XX-9999	?

What is the Primary Owner's home address?
Home address should not be a P.O. Box.

Home Address 1 * 12345 Broadway		
Home Address 2		
City * Detroit	State * MI	Zip Code * 48304-0000

Please confirm the business information below.

Business Name * Green Belle Lawncare	
DBA	?
<input checked="" type="checkbox"/> I do not have a DBA	
EIN / TIN	?
<input checked="" type="checkbox"/> My EIN is the same as my SSN	

Please use the business address registered with the IRS.

Business Address 1 * 12345 Broadway		
Business Address 2		
City * Detroit	State * MI	Zip Code * 48304-0000

[Back](#) [Next](#)

Step 2b: Complete the Autobooks enrollment page 2.

Business Information
● ● ●

Please provide the additional information below.

Company Formation Year * Business Structure *

Which industry does your business serve?
Industry *

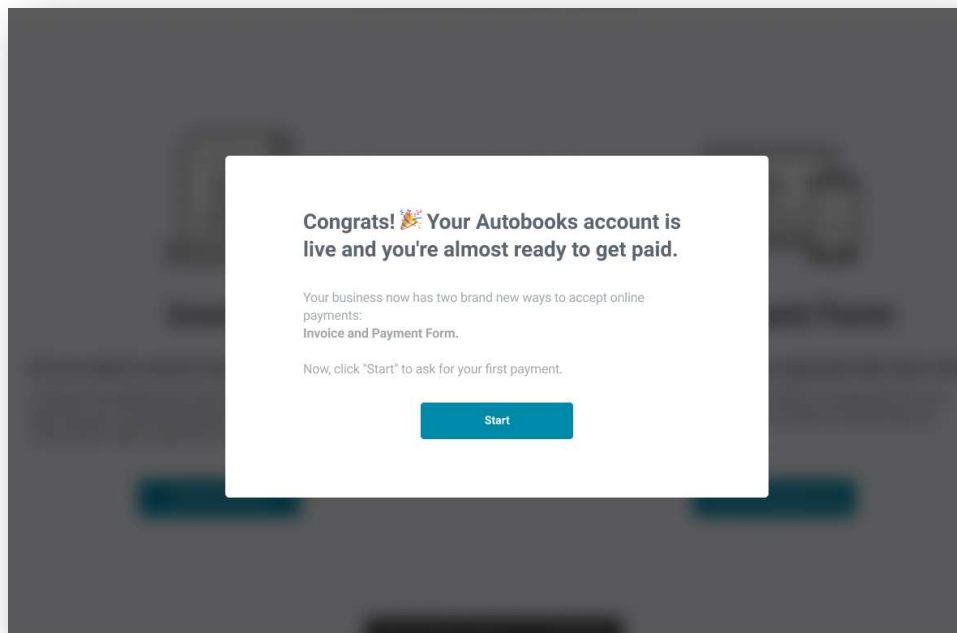
What is the largest single payment you expect to receive?
This could be from invoicing, donations, or however you expect to receive income and is just an estimate.

Largest Single Payment *

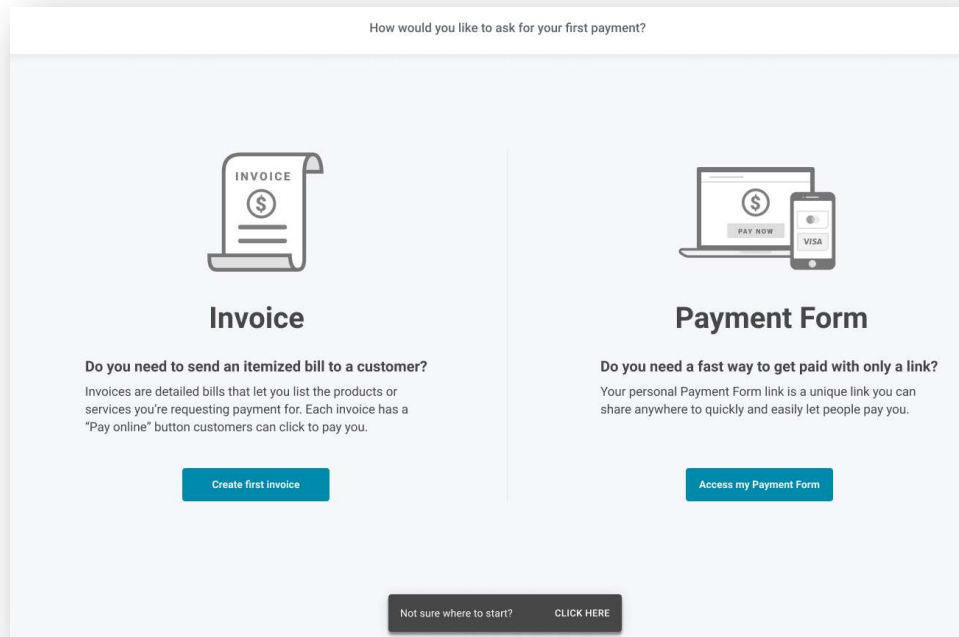
What is the average payment amount you expect to receive?
Average Payment *

What is your estimated annual revenue?
Estimated Annual Revenue *

[Back](#) [Submit](#)



Step 3: The user will choose to Create an Invoice or Access my Payment Form. If the user is unsure, Autobooks will provide an informational pop-up explaining each.



3a) If the user chooses to create an invoice, Autobooks will teach the user how to successfully send an invoice to a customer. To begin, the user will add their customer's information.

Step 1/3: Add your customer's info

1 Tell Autobooks who you want to send this invoice to

Will you send this invoice to a company (i.e. Jan's Dry Cleaning Service) or an individual (i.e. Jan Smith)?

Company Individual

Customer's first name *

Customer's last name *

Customer's email *

Invoice due date *
08/13/2019

We'll send your invoice to your customer's email so they can pay you any time day or night via credit card or bank account info.

[Previous](#) [Add billable items](#)

3b) Next, the user will add the name of the product or service they want to bill for.

Step 2/3: Add the products or services you're billing for

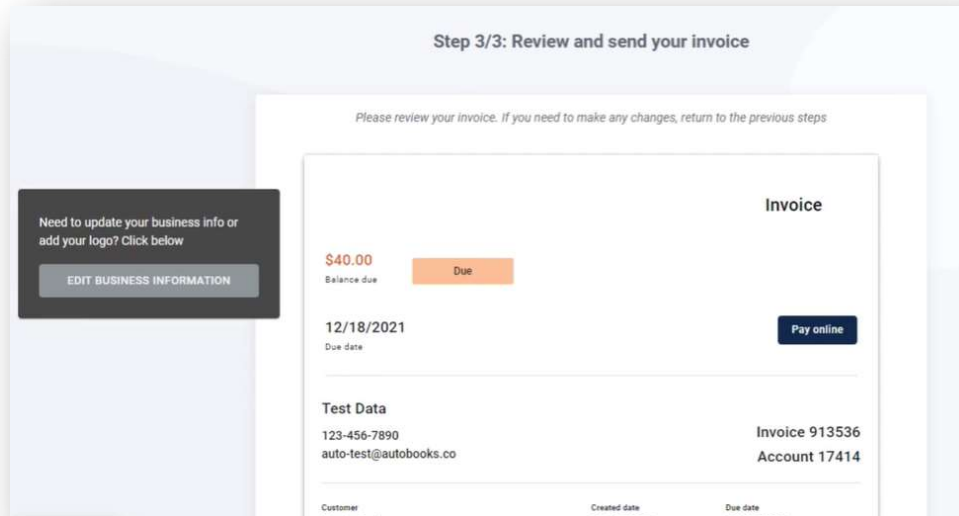
2 Now, tell us what you're invoicing for

<input type="text" value="Title of your product or service *"/>	<input type="text" value="1"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
---	--------------------------------	-------------------------------------	-------------------------------------

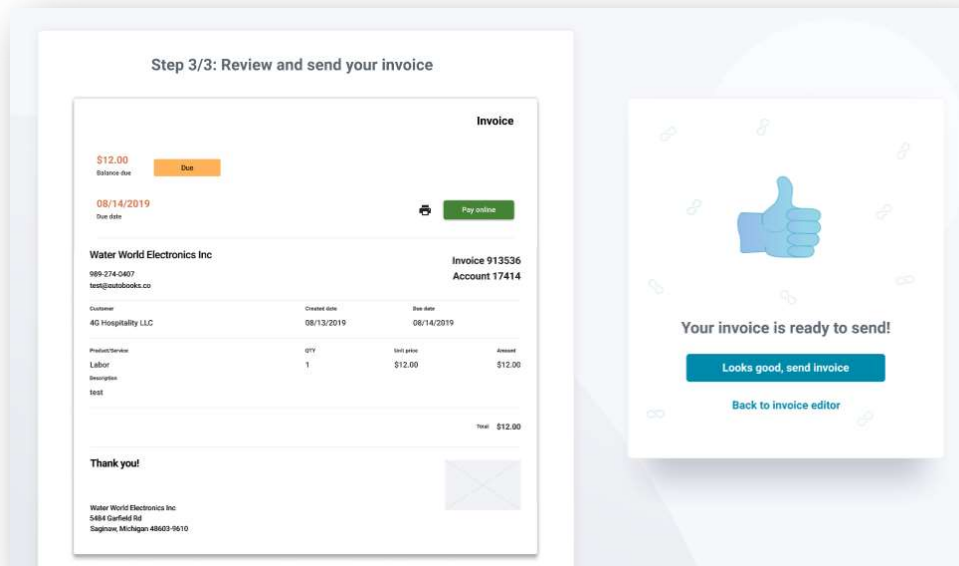
Total cost: \$0.00


[< Edit customer info](#) •••

3c) The user may add their business logo and/or contact information to the invoice template.



3d) The last step for the user is to review the invoice and send it to their customer.



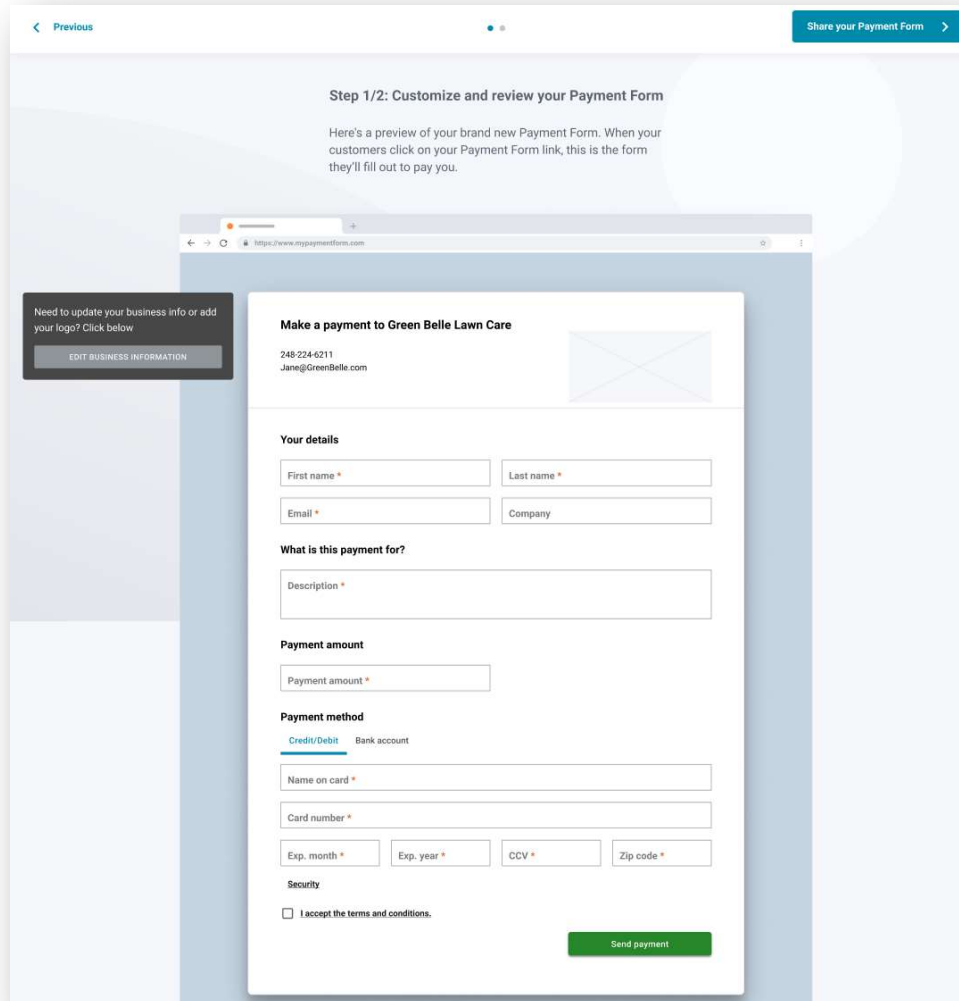


Congrats! Your first invoice is on its way to your customer.

You can now view your invoice in the invoice list, or explore the rest of Autobooks by visiting the dashboard.

[View invoice list](#) [Go to dashboard](#)

Step 4: Alternately, Autobooks will teach the user how to successfully complete the Payment Form.

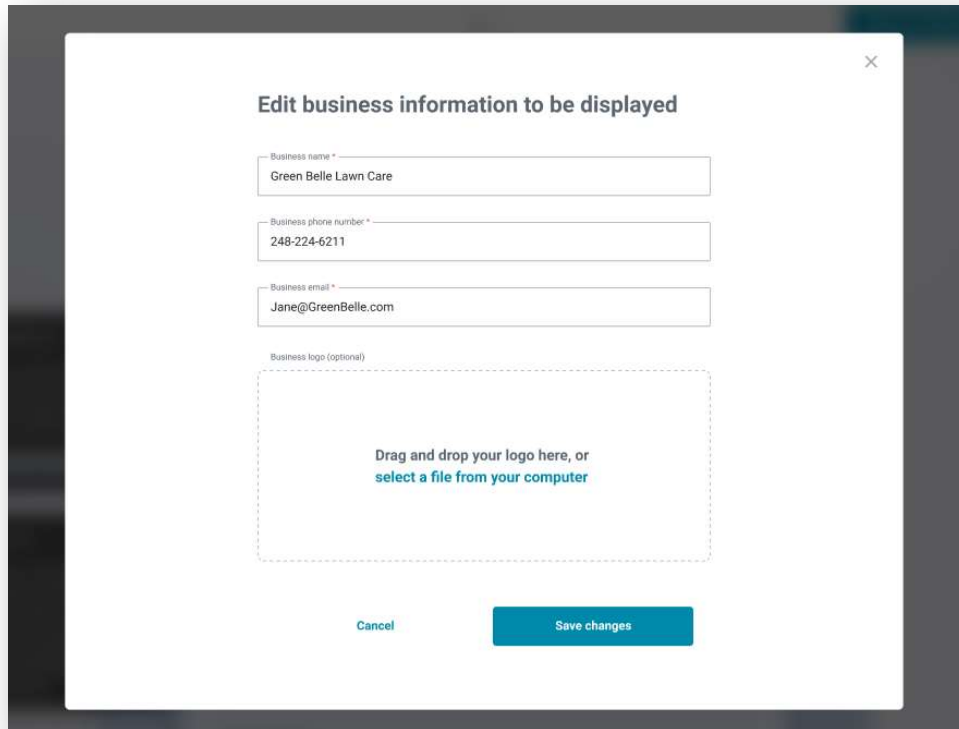


The screenshot shows a web browser window displaying a payment form. The browser's address bar shows the URL <https://www.mypaymentform.com>. The page title is "Make a payment to Green Belle Lawn Care". The form includes the following sections:

- Business Information:** 248-224-6211, Jane@GreenBelle.com, and a placeholder for a logo.
- Your details:** Fields for First name, Last name, Email, and Company.
- What is this payment for?:** A text area for Description.
- Payment amount:** A text input field for Payment amount.
- Payment method:** Radio buttons for "Credit/Debit" (selected) and "Bank account". Fields for Name on card, Card number, Exp. month, Exp. year, CCV, and Zip code.
- Security:** A checkbox for "I accept the terms and conditions."
- Buttons:** "Send payment" (green) and "EDIT BUSINESS INFORMATION" (grey).

Navigation links include "Previous" and "Share your Payment Form". A message at the top reads: "Step 1/2: Customize and review your Payment Form. Here's a preview of your brand new Payment Form. When your customers click on your Payment Form link, this is the form they'll fill out to pay you."

4b): The user can edit their business information and add a logo for the Payment Form during the tutorial, which will be applied going forward.

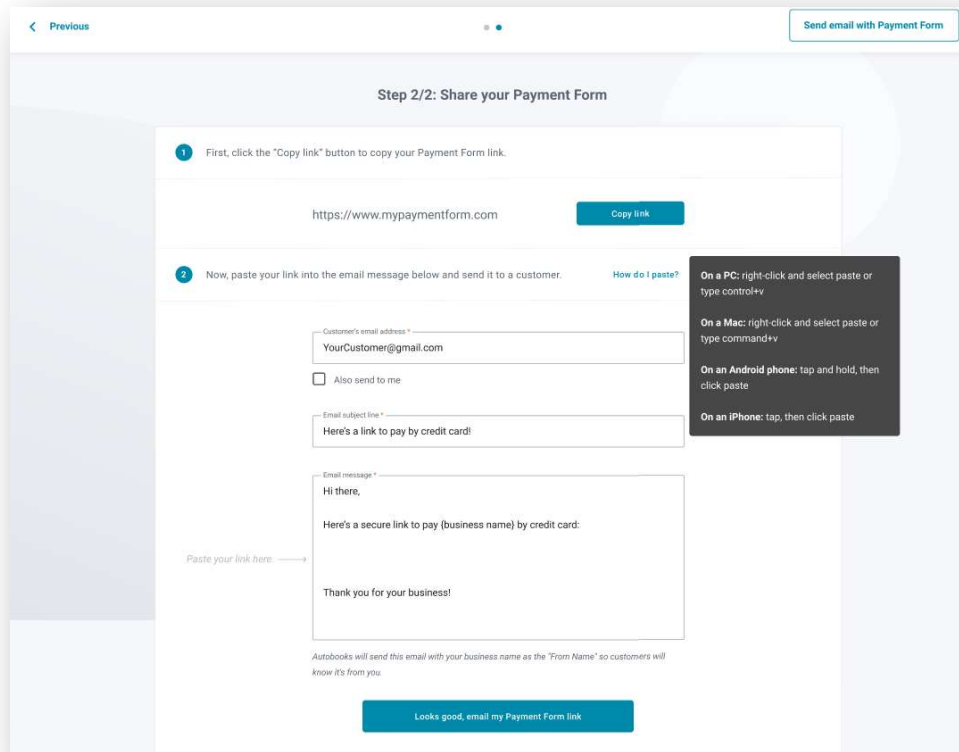


The screenshot shows a modal dialog box titled "Edit business information to be displayed" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Business name ***: A text input field containing "Green Belle Lawn Care".
- Business phone number ***: A text input field containing "248-224-6211".
- Business email ***: A text input field containing "Jane@GreenBelle.com".
- Business logo (optional)**: A dashed rectangular area containing the text "Drag and drop your logo here, or select a file from your computer".

At the bottom of the dialog, there are two buttons: "Cancel" and "Save changes".

4c): The user will learn how to copy their custom payment link and paste it into an email. To complete the tutorial, the user will email the payment form link to their customer.



Step 2/2: Share your Payment Form

1 First, click the "Copy link" button to copy your Payment Form link.

https://www.mypaymentform.com [Copy link](#)

2 Now, paste your link into the email message below and send it to a customer. [How do I paste?](#)

Customer's email address *
YourCustomer@gmail.com

Also send to me

Email subject line *
Here's a link to pay by credit card!

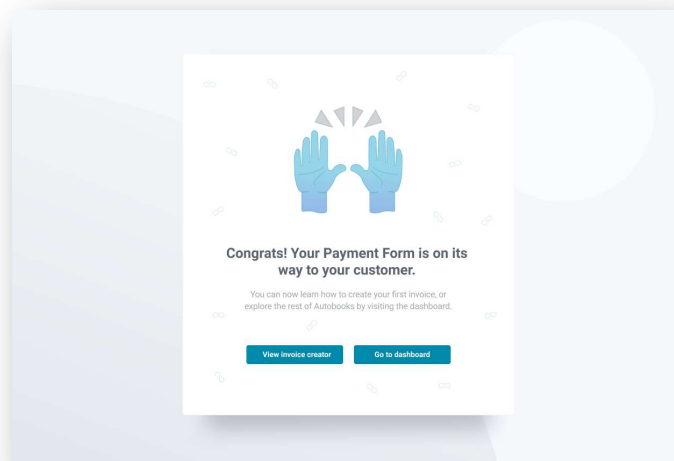
Email message *
Hi there,
Here's a secure link to pay (business name) by credit card:
Thank you for your business!

Paste your link here: →

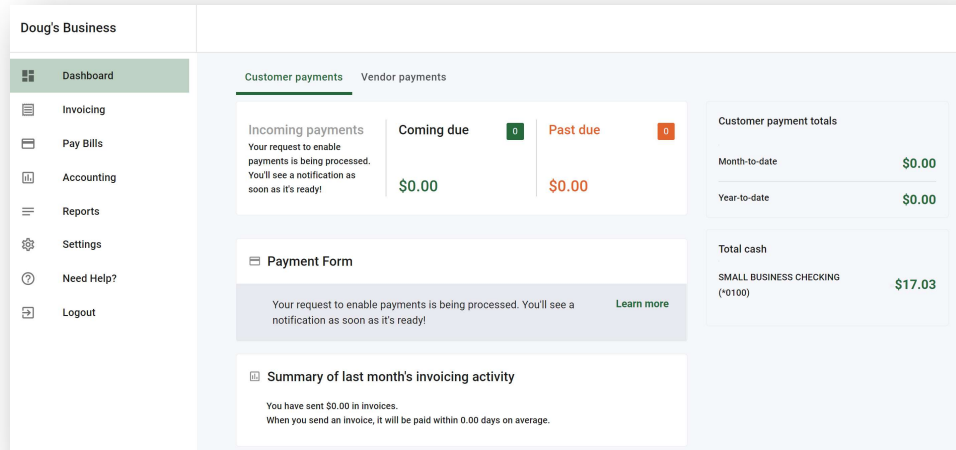
Autobooks will send this email with your business name as the "From Name" so customers will know it's from you.

[Looks good, email my Payment Form link](#)

On a PC: right-click and select paste or type control+v
On a Mac: right-click and select paste or type command+v
On an Android phone: tap and hold, then click paste
On an iPhone: tap, then click paste



Finished! You will now see the Autobooks dashboard.



***Please note: Once enrolled, you can send out invoices but until your business is payment enabled a customer will be unable to pay that invoice. This process can take up to 48 hours. After your business is approved by Autobooks, you will then receive an email you can begin accepting ACH payments and credit card payments.**

Questions? Contact the Autobooks Customer Care Team

Live Support Specialist Hours

Monday - Friday
9:00 a.m. – 6:00 p.m. Eastern Time

Phone:
866-617-3122

Email:
support@autobooks.co