



AUTOBOOKS PRODUCT OVERVIEW

ABOUT AUTOBOOKS

WHAT IS AUTOBOOKS?

Autobooks is a tool for Business Members that allows you to send invoices, accept payments, and keep track of customers from *inside* online banking.

WHO IS AUTOBOOKS FOR?

Business Members must have a business checking account and access to DataNet Online Banking to enroll in Autobooks or DataMobile.

The following types of businesses are great fits for Autobooks:

- Any business that sends a bill/invoice for its product or service
- Service-based businesses
- Non-profits seeking to collect donations online

WHAT ARE THE BENEFITS TO USING AUTOBOOKS?

Autobooks is a complete set of financial tools inside of Online Banking. Run your business from one place, without the need to pay for other software.

With Autobooks, you can:

- Create professional invoices electronically or physically in seconds.
- Accept payment by credit card, debit card and ACH transfer, all directly on the invoices you send.
- Keep track of which customer has paid, and how much.
- Generate reports like balance sheets, income statements, and customer aging reports at the click of a button.

GETTING STARTED WITH AUTOBOOKS

HOW DO I SIGN UP TO TRY IT?

You can self-enroll directly in DataNet Online Banking or on the DataMobile app.

IS THERE A FEE TO USE AUTOBOOKS?

Yes, \$10 per month provides access to the entire Autobooks solution. Additionally, when collecting payments via credit / debit card, there is a 3.49% transaction fee. Payment collections via ACH carry a 1.00% transaction fee.

IS AUTOBOOKS WORKING WITH VALLEY STRONG CREDIT UNION? IS THIS SAFE?

Yes! Autobooks has partnered with Valley Strong Credit Union to bring Business Members the best invoicing and accounting platform available on the market. Autobooks exceeds industry standard security to protect customer information.

DO I HAVE TO DOWNLOAD ANY SOFTWARE TO USE AUTOBOOKS?

No additional software is needed to download of any kind. Autobooks lives completely inside of DataNet Online Banking.

HOW IS THIS DIFFERENT FROM QUICKBOOKS?

Autobooks is built directly into DataNet Online Banking, so you don't need multiple logins. Additionally, Autobooks is designed with small business owners in mind, not accountants, so it's streamlined to focus on receivables, payables, and cashflow, while providing a fully functional accounting tool in the background.

I ALREADY HAVE QUICKBOOKS. WHY SHOULD I CONSIDER SWITCHING TO AUTOBOOKS?

Autobooks is an equally powerful business accounting system that keeps everything securely in one place: inside your current online business account. Our features are the right size for small businesses.

DOES AUTOBOOKS REPLACE QUICKBOOKS?

Yes, it can. Autobooks is a simple way to keep your business accounting organized. Autobooks is built for business owners, not accountants, and an Autobooks specialist will be more than happy to help you import your QuickBooks data so you can see the difference for yourself...and no, they do not charge extra for this service.

That said, some businesses choose to add Autobooks on top of their existing systems, and simply utilize Autobooks for its invoicing and payments functionality.

WHERE CAN I LEARN MORE?

You can visit our website <https://www.valleystrong.com/Business-Banking-Cash-Management> for more information or email our Cash Management team at cashmanagementservices@valleystrong.com. Additionally, you can contact Autobooks directly at 866-617-3122, or you may book a time with an Autobooks Specialist for more information.