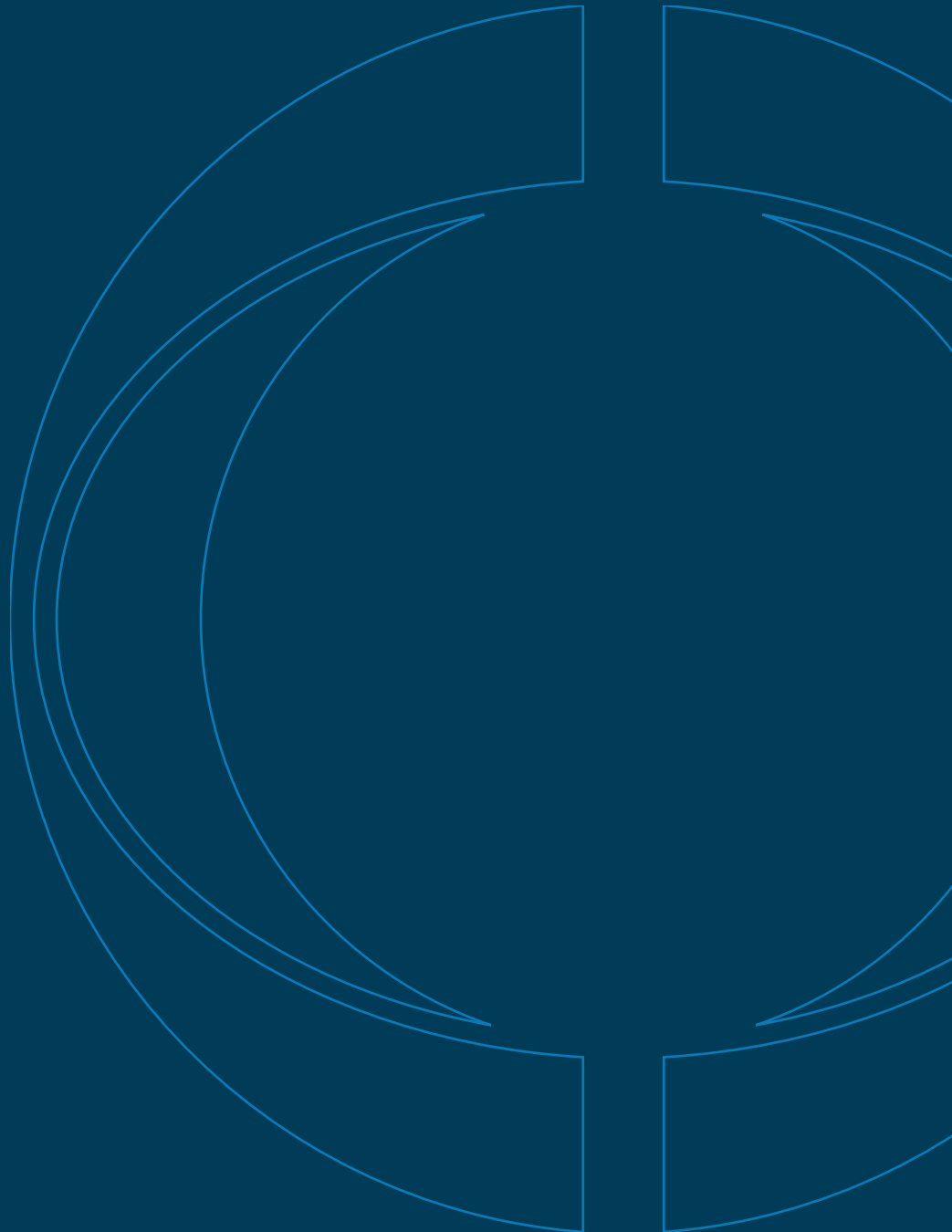


AUTOBOOKS INVOICE USER GUIDE:
SMALL BUSINESS



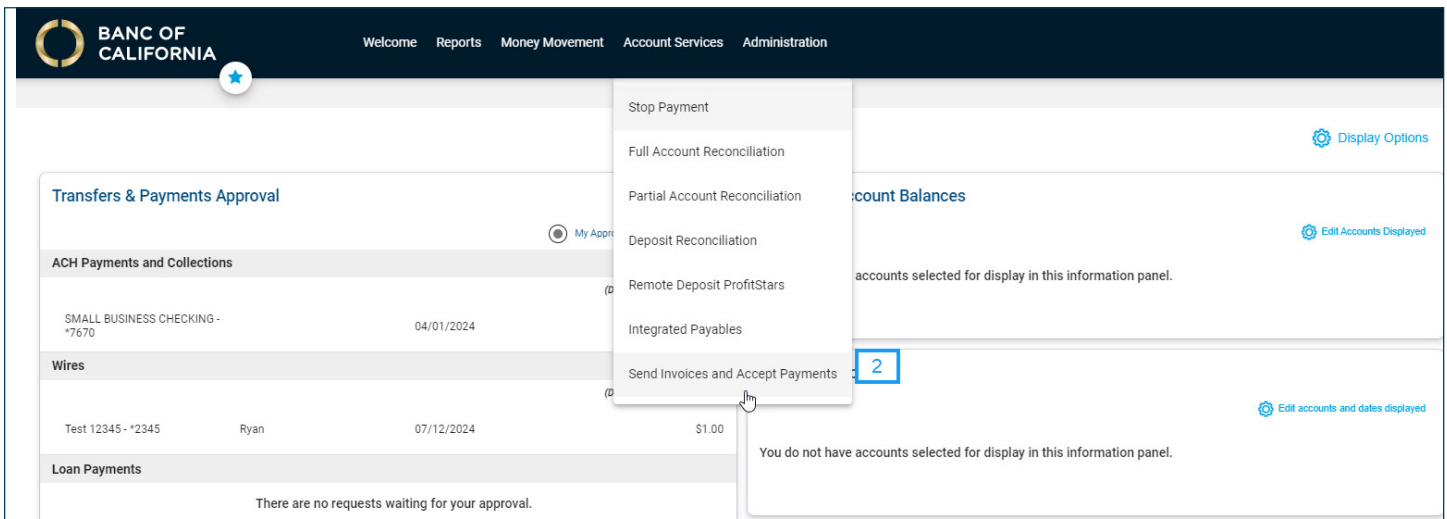
Digital Invoicing & Payment Acceptance

Powered by Autobooks Invoice Guide

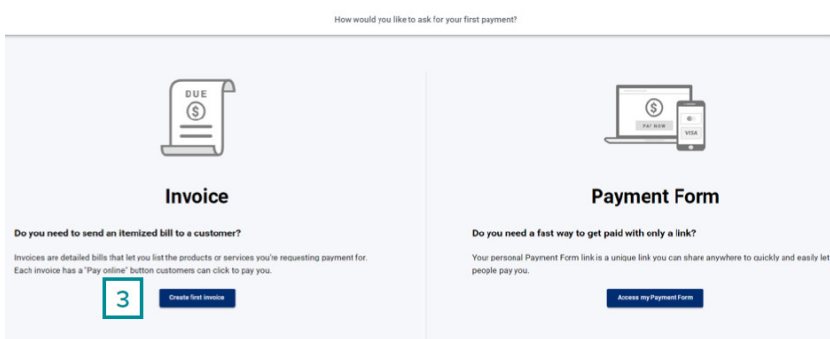
Send your first invoice

Ensure your company administrator has enabled your user ID for Autobooks, then follow the instructions below.

- 1 Log in to Online Banking
- 2 Hover over **Account Services** and click **Send Invoices and Accept Payments**.



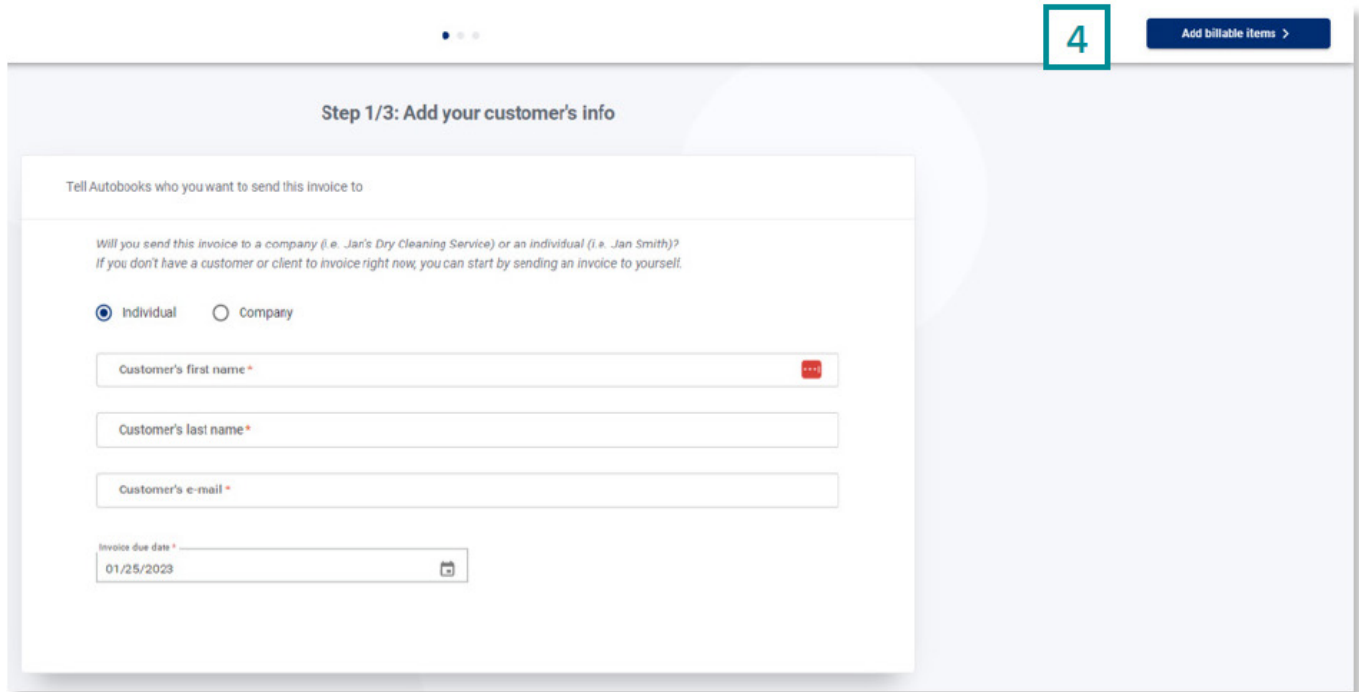
- 3 Click **Create first invoice**.



(Cont'd on next page)

(cont'd) Send your first invoice

- 4 Fill in your customer's information and click **Add billable items**.



4 [Add billable items >](#)

Step 1/3: Add your customer's info

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)?
If you don't have a customer or client to invoice right now, you can start by sending an invoice to yourself.*

Individual Company

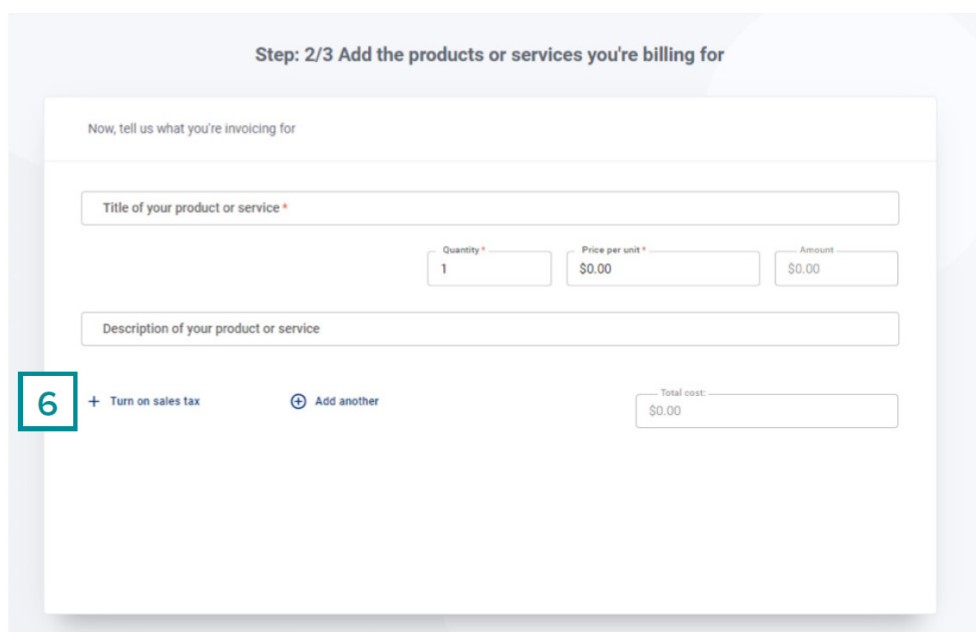
Customer's first name *

Customer's last name *

Customer's e-mail *

Invoice due date *
01/25/2023

- 5 Add the product(s) or service(s) info for which you're billing - including quantity, price per unit and a description of the product(s) or service(s). Follow steps 6 through 10 to add sales tax. Follow steps 11 and 12 to add line items to your invoice. To skip these steps and proceed to invoice review, proceed to step 13.
- 6 **OPTIONAL:** Click **Turn on sales tax** to automatically compute sales tax and add to the invoice.



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

Now, tell us what you're invoicing for

Title of your product or service *

Quantity * Price per unit * Amount

1 \$0.00 \$0.00

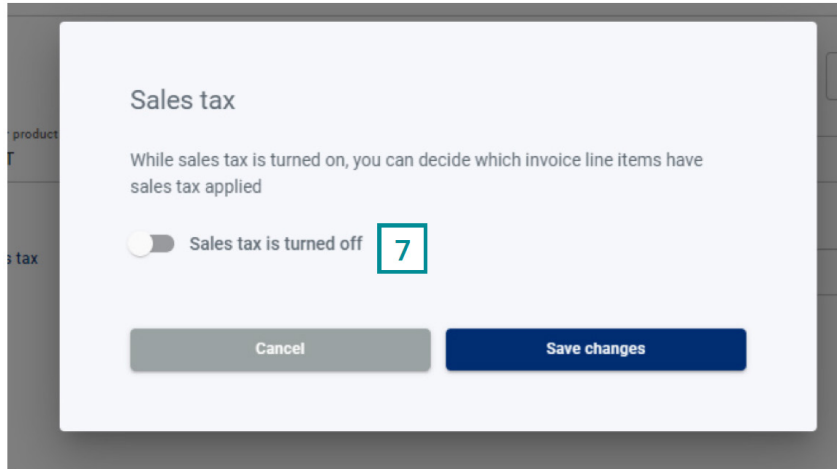
Description of your product or service

6 [+ Turn on sales tax](#) [+ Add another](#) Total cost: \$0.00

(Cont'd on next page)

(cont'd) Send your first invoice

7 OPTIONAL: Toggle **Sales tax is turned off** to on.

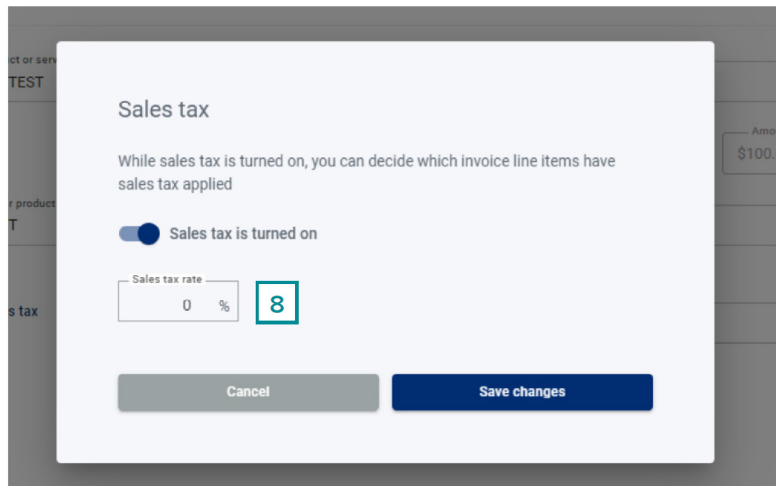


Sales tax

While sales tax is turned on, you can decide which invoice line items have sales tax applied

Sales tax is turned off **7**

8 OPTIONAL: Enter the desired sales tax rate and click **Save changes**.



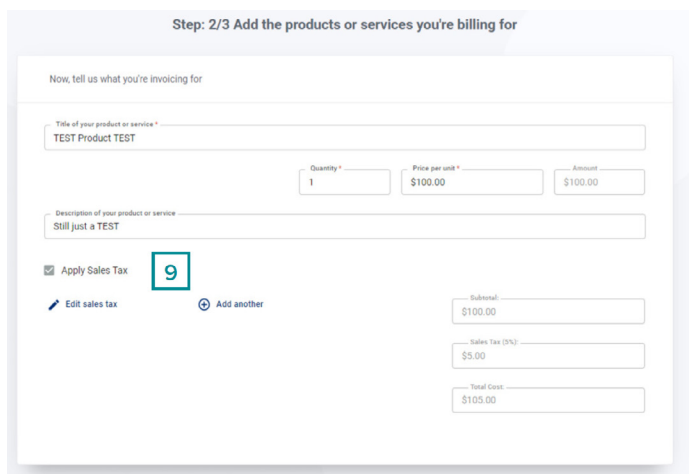
Sales tax

While sales tax is turned on, you can decide which invoice line items have sales tax applied

Sales tax is turned on

Sales tax rate: % **8**

9 OPTIONAL: Check the box for **Apply Sales Tax**.



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

Now, tell us what you're invoicing for

Title of your product or service *
TEST Product TEST

Quantity *	Price per unit *	Amount
1	\$100.00	\$100.00

Description of your product or service
Still just a TEST

Apply Sales Tax **9**

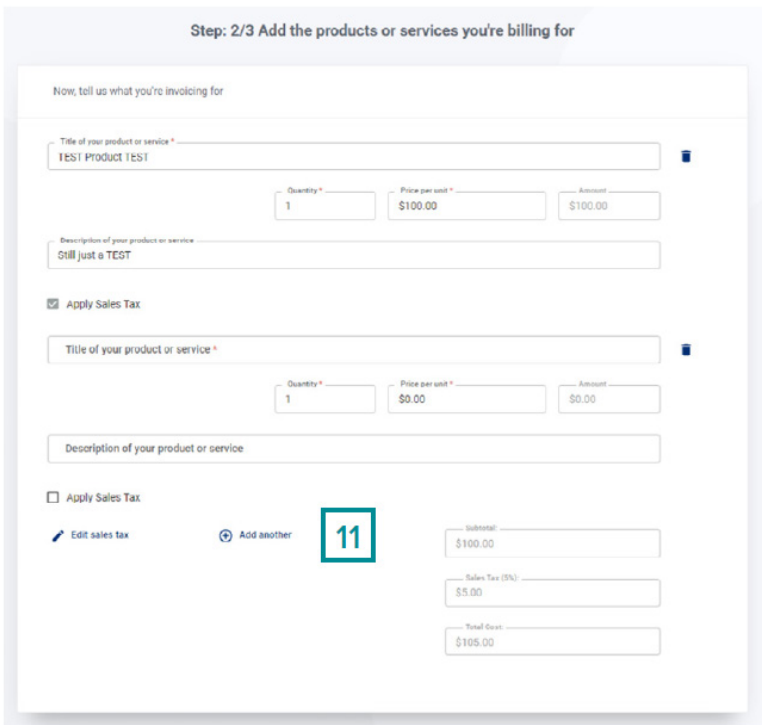
[Edit sales tax](#) [Add another](#)

Subtotal:	\$100.00
Sales Tax (5%):	\$5.00
Total Cost:	\$105.00

(Cont'd on next page)

(cont'd) Send your first invoice

- 10 **OPTIONAL:** Repeat step 9 as needed to add sales tax to additional line items.
- 11 **OPTIONAL:** Click **Add another** to add line items to this invoice.



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

Now, tell us what you're invoicing for

Title of your product or service *

TEST PRODUCT TEST

Quantity * 1 Price per unit * \$100.00 Amount \$100.00

Description of your product or service

Still just a TEST

Apply Sales Tax

Title of your product or service *

Quantity * 1 Price per unit * \$0.00 Amount \$0.00

Description of your product or service

Apply Sales Tax

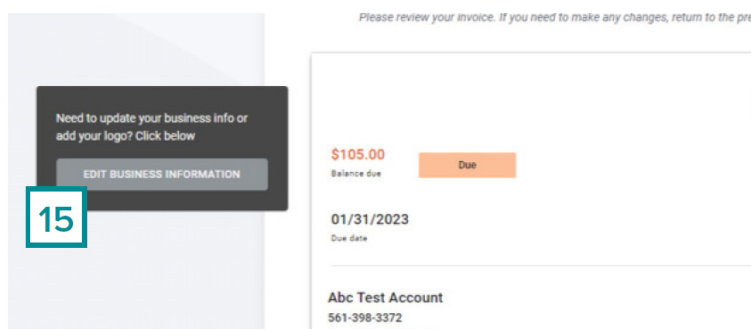
[Edit sales tax](#) [Add another](#) **11**

Subtotal: \$100.00

Sales Tax (5%): \$5.00

Total Due: \$105.00

- 12 **OPTIONAL:** Repeat step 5 as needed for each additional line item.
- 13 **OPTIONAL:** Once you've filled in all required information and included any needed sales tax and/or additional line items, click **Review invoice** (top right corner of screen).
- 14 Scroll down as needed to review your entire invoice.
- 15 **OPTIONAL:** To update your business information or add your logo to the invoice, click **EDIT BUSINESS INFORMATION**. To skip editing and send your invoice, proceed to step 17.



Please review your invoice. If you need to make any changes, return to the prev

Need to update your business info or add your logo? Click below

15 EDIT BUSINESS INFORMATION

\$105.00 Due

Balance due

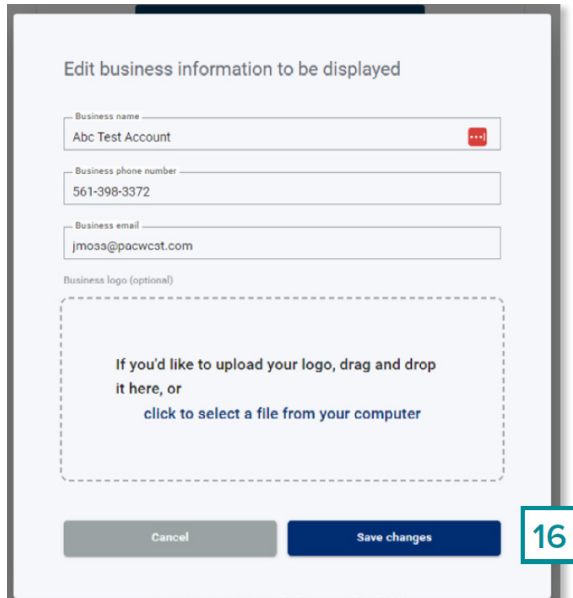
01/31/2023 Due date

ABC Test Account
561-398-3372
invoice@bancwest.com

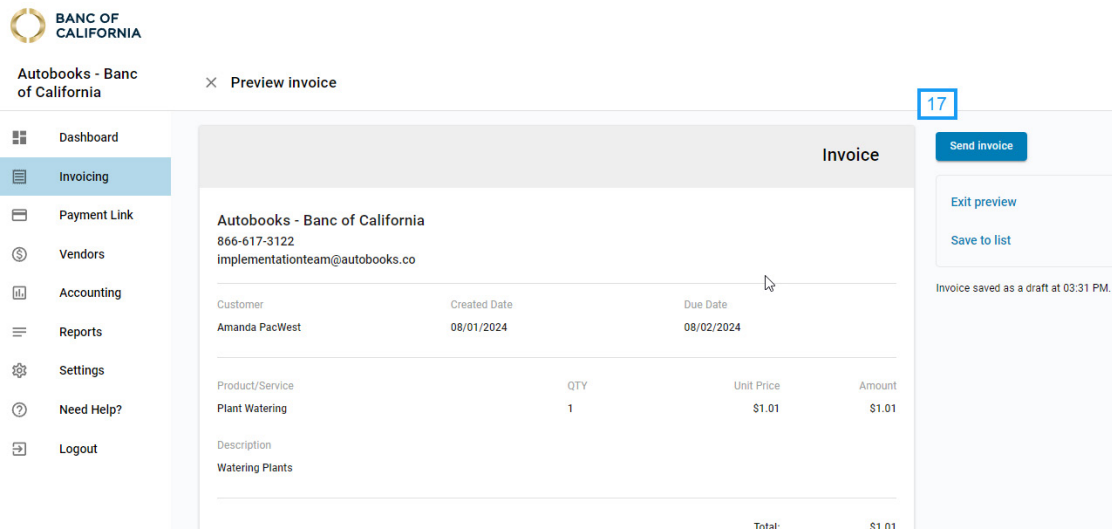
(Cont'd on next page)

(cont'd) Send your first invoice

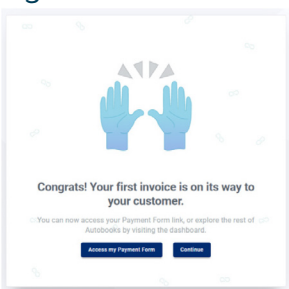
- 16 OPTIONAL:** Update your business information as needed and/or add your logo. Click **Save changes**.



- 17** Repeat step 14 - if all information is correct, click **Looks good, send invoice**.



- 18** Congratulations! You've sent your first invoice.



(Cont'd on next page)

AUTOBOOKS INVOICE USER GUIDE:
SMALL BUSINESS

