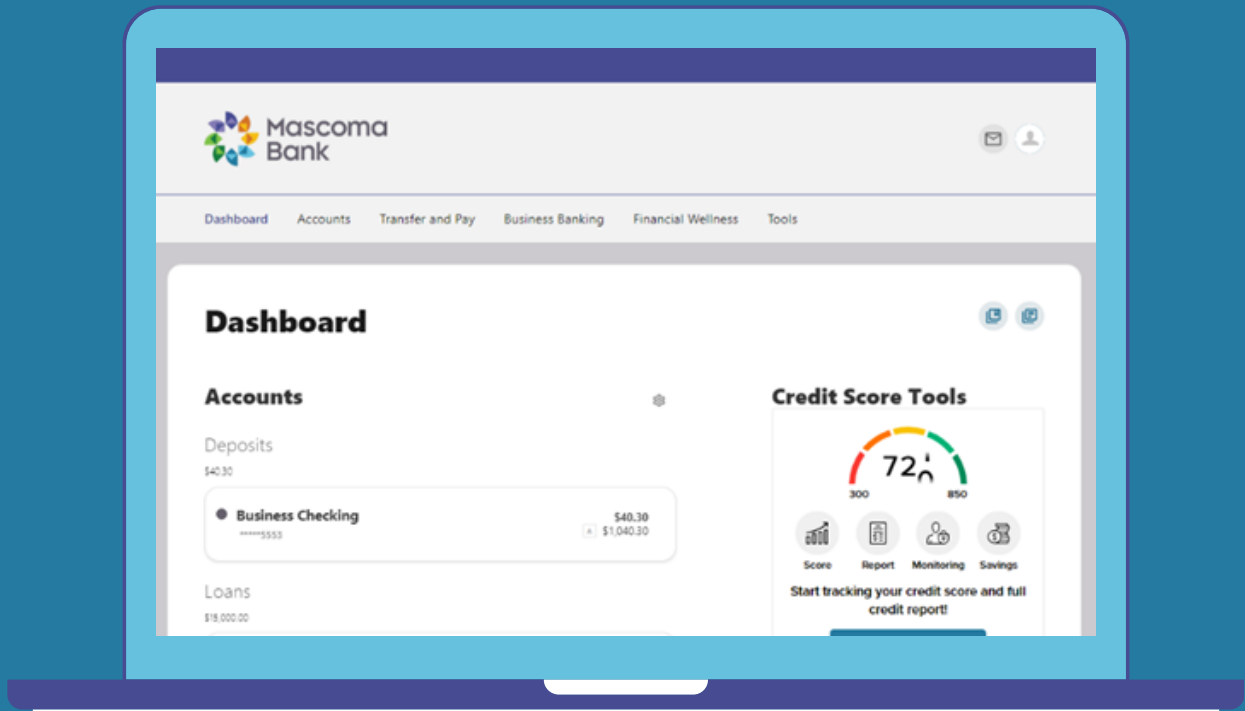


# Autobooks User Guide

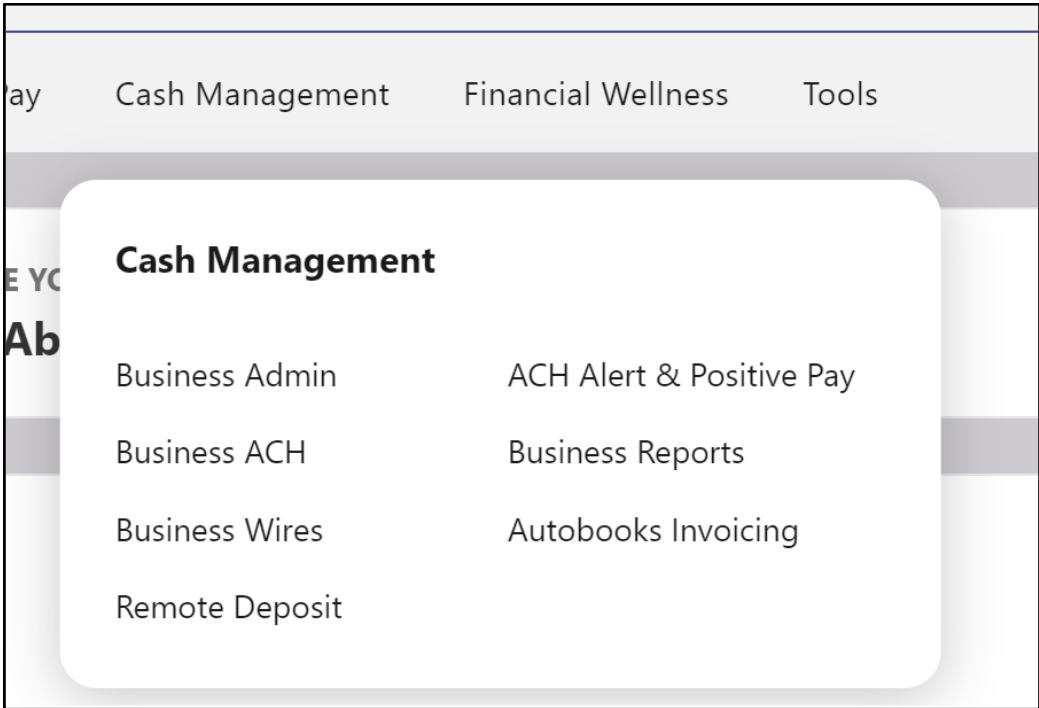


Mascoma  
Bank

COMMUNITY FIRST  
SINCE 1899

**Autobooks**

Go to the Business Banking menu and click on "Autobooks Invoicing."



Select where you would like payments deposited. Accept Terms and Continue.

**Autobooks Terms of Use and End User License**

1. Definitions

In addition to terms defined in the Agreement, capitalized terms used in this Agreement shall have the following meanings:

(a) "Account" means that depository account at FI in User's name in

[Download PDF](#)

**Processing rates**

Online credit card payments	3.49%
Online ACH payments	1%

No monthly fees.

**Select where you would like payments deposited**


Small Business Checking (\*8459)

Small Business Checking (\*7409)

[Accept Terms and Continue](#)

Click "Next."

You're almost ready to start getting paid!

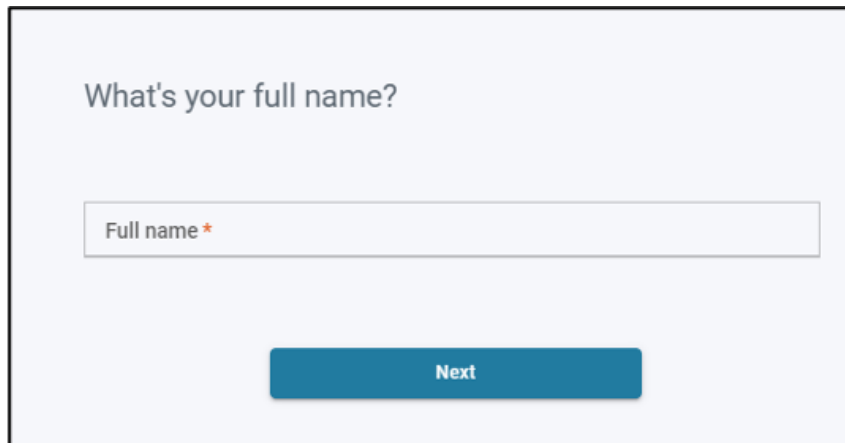


Let's confirm a few pieces of information so you can accept customer payments into your Mascoma Bank account. **Please provide only primary business owner information.** This usually takes less than two minutes.

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

[Next](#)

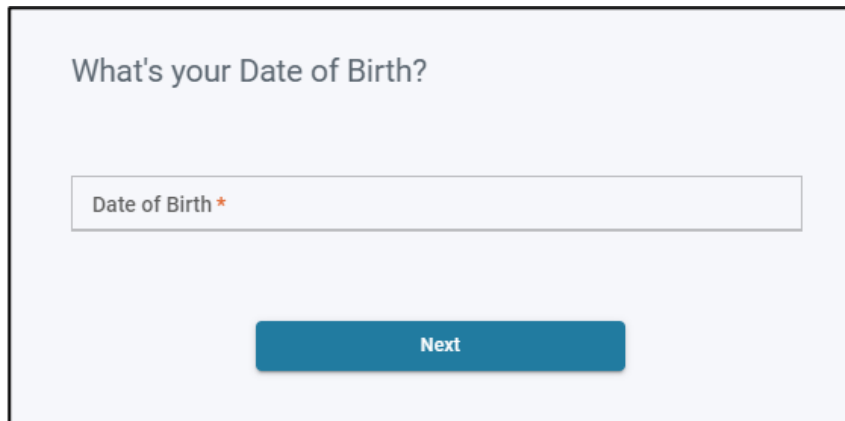
Enter your full name and click "Next."



What's your full name?

Next

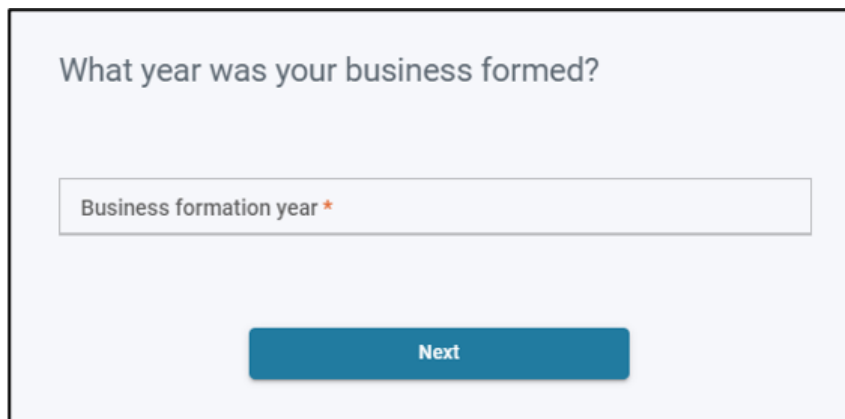
Enter your date of birth and click "Next."



What's your Date of Birth?

Next

Enter the year your business was formed and click "Next."



What year was your business formed?

Next

Answer the following questions. Please note, you may be required to answer follow-up questions based on your answers.

Does your business have a website?

No  
 Yes

Next

Does your business have a DBA?

No  
 Yes

Next

What industry does your business operate in?

Choose the general sector, then the specific industry, that best matches your business. If you don't see an exact match, you can pick the next closest option.

Sector \*

Industry \*

Please select a Sector

Next

What products or services does your business offer?

Products or services offered \*

This can be a simple answer, like "t-shirts" or "church services"

Next

What's the largest payment you expect to receive?

Largest payment amount \*

\$ 0

This is just an estimate. Payments could be from invoicing, donations, or however else you expect to receive income.

Next

What's your estimated annual revenue?

Annual revenue amount \*

\$ 0

Next

What's your Social Security Number?

Social Security Number \*

In order for you to accept credit card payments, we are federally required to collect your Social Security Number.

Next

What's your EIN (Employer Identification Number)?

EIN / TIN \*

EIN/TIN is required as part of the payment processing verification. If you are a Sole Proprietor, this could also be your Social Security Number.

Next

Are there any other individuals who own 25% or more of this business?

No


Yes

Complete

Click "Complete."

Click "Close."

Thanks for confirming your information!



We'll review your information and set up your account to receive payments. This one-time process should take less than 5 minutes.

Feel free to close this window and take some time to explore the app. We'll let you know once we're done.

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

Close

Click "Start."

**Congrats! 🎉 Your Autobooks account is live and you're almost ready to get paid.**

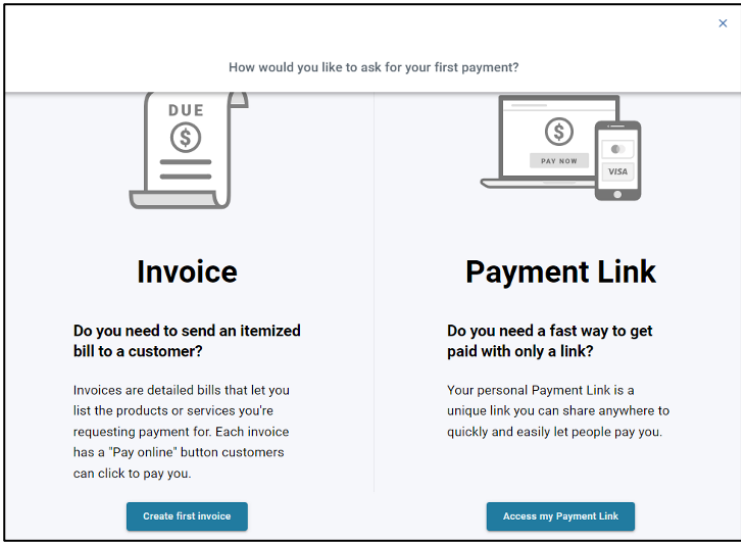
Your business now has two brand new ways to accept online payments: Invoice and Payment Link.

Now, click "Start" to ask for your first payment.

Start

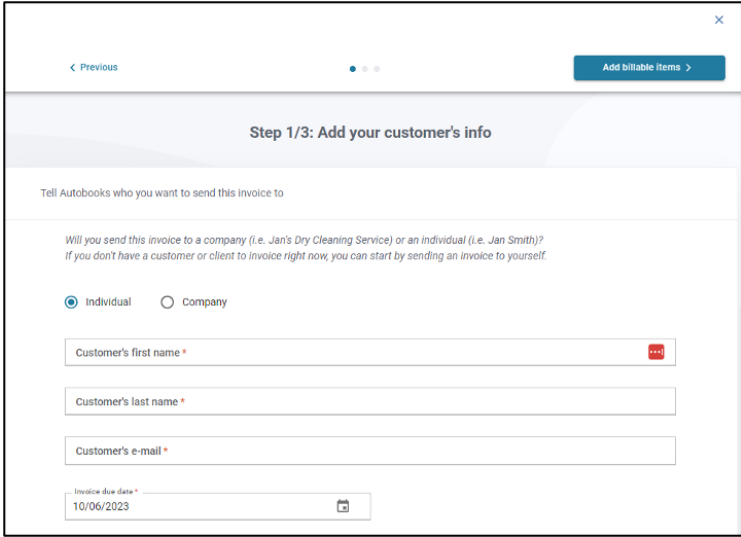


Choose how you would like to ask for your first payment, Invoice or Payment Link.



### Create an Invoice

Complete the necessary fields to add your customer's information. Click "Add Billable Items."



Enter the necessary fields. Utilize the Add Another feature to bill for additional items or use the Turn on sales tax feature to calculate sales tax.

The screenshot shows a mobile application interface for creating an invoice. At the top, there are navigation options: '< Edit customer info' on the left and 'Review invoice >' on the right. Below this is a header that says 'Now, tell us what you're invoicing for'. The main form area contains several input fields: 'Title of your product or service \*', 'Quantity \*' (with '1' entered), 'Price per unit \*' (with '\$0.00' entered), and 'Amount' (with '\$0.00' entered). Below these is a 'Description of your product or service' field. At the bottom left, there are two buttons: '+ Turn on sales tax' and '+ Add another'. At the bottom right, there is a 'Total cost:' field with '\$0.00' entered.

Use the slider to turn sales tax on and enter the tax rate. Click "Save changes."

The screenshot shows a 'Sales tax' configuration dialog box. The title is 'Sales tax'. Below the title is a sub-header: 'While sales tax is turned on, you can decide which invoice line items have sales tax applied'. There is a toggle switch labeled 'Sales tax is turned on' which is currently turned on. Below the toggle is a 'Sales tax rate' input field with '0 %' entered. At the bottom of the dialog are two buttons: 'Cancel' and 'Save changes'.

You will now see a check box to Apply Sales Tax.

The screenshot shows a form titled "Edit customer info" with a "Review invoice" button in the top right. The form contains the following fields and options:

- Title of your product or service: Flooring
- Quantity: 10
- Price per unit: \$100.00
- Amount: \$1,000.00
- Description of your product or service: Oak Flooring
- Apply Sales Tax:
- Buttons: Edit sales tax, Add another
- Total cost: \$1,000.00

Click "Review invoice."

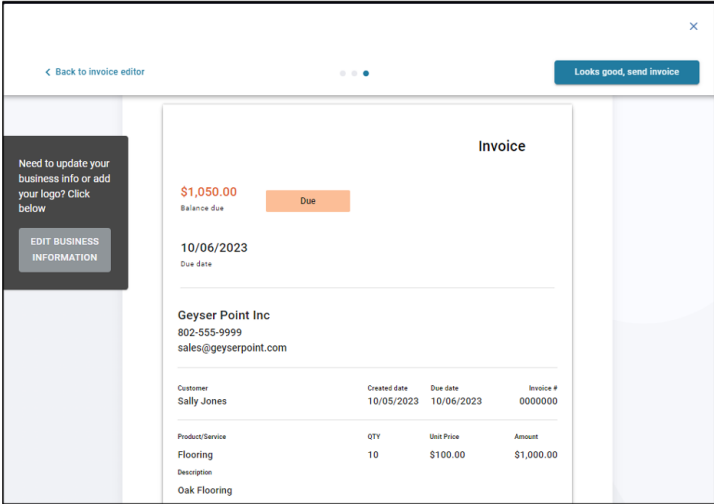
Click on "Edit Business Information" to update your information or to add a logo.

Save changes.

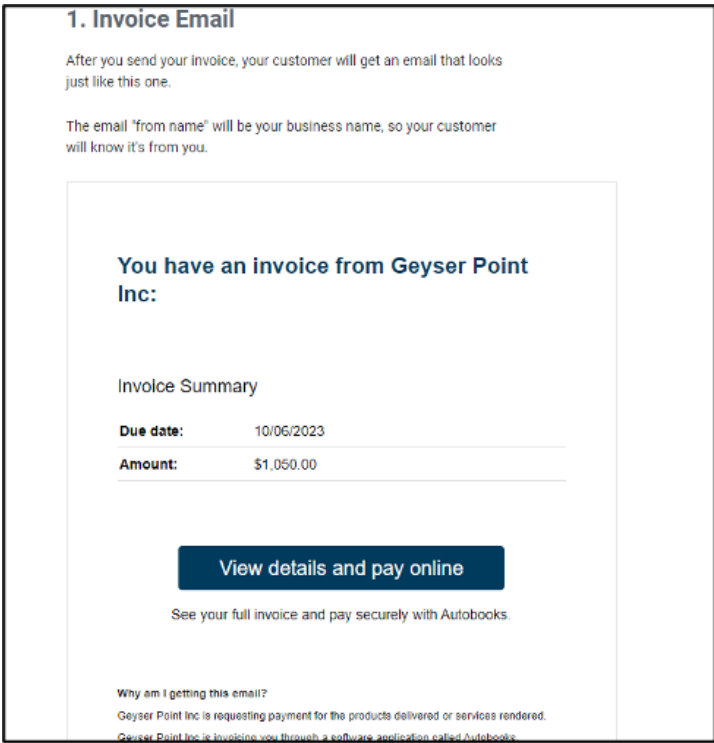
The screenshot shows a form titled "Edit business information to be displayed" with the following fields and options:

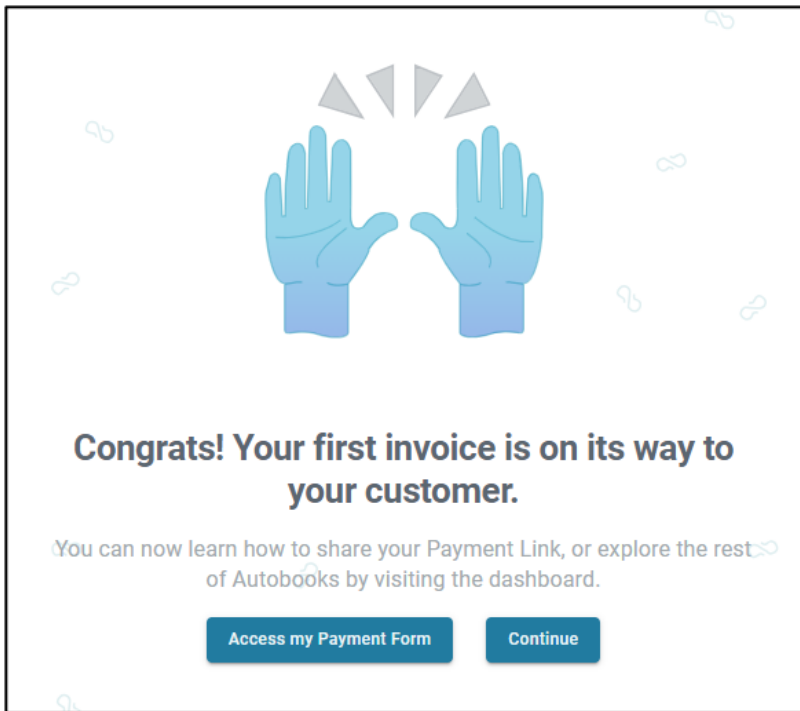
- Business name: Geyser Point Inc
- Business phone number: 802-555-9999
- Business email: sales@geyserpoint.com
- Business logo (optional): A dashed box containing the text "If you'd like to upload your logo, drag and drop it here, or click to select a file from your computer"
- Buttons: Cancel, Save changes

Click "Looks good, send invoice."



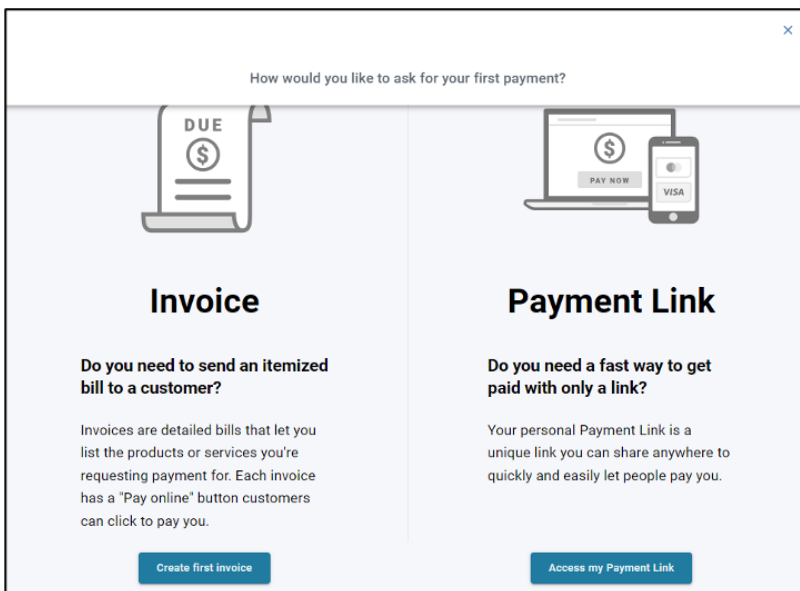
Your customer will receive an email similar to this.





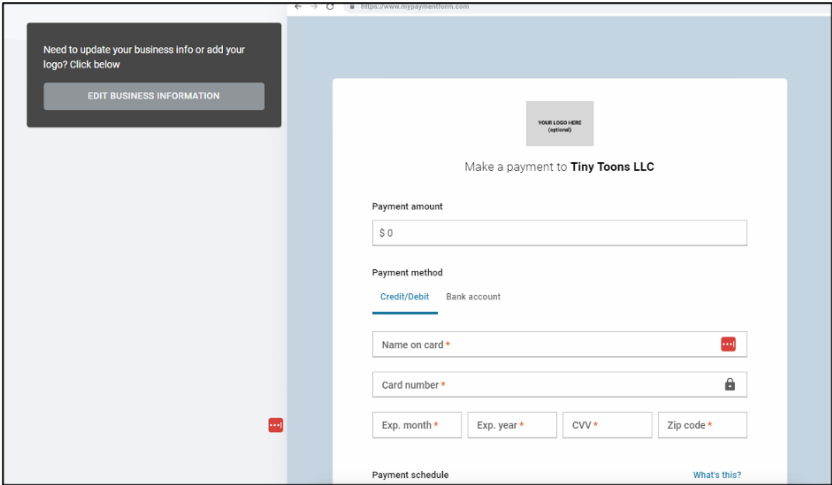
## Payment Link

Click "Access my Payment Link."

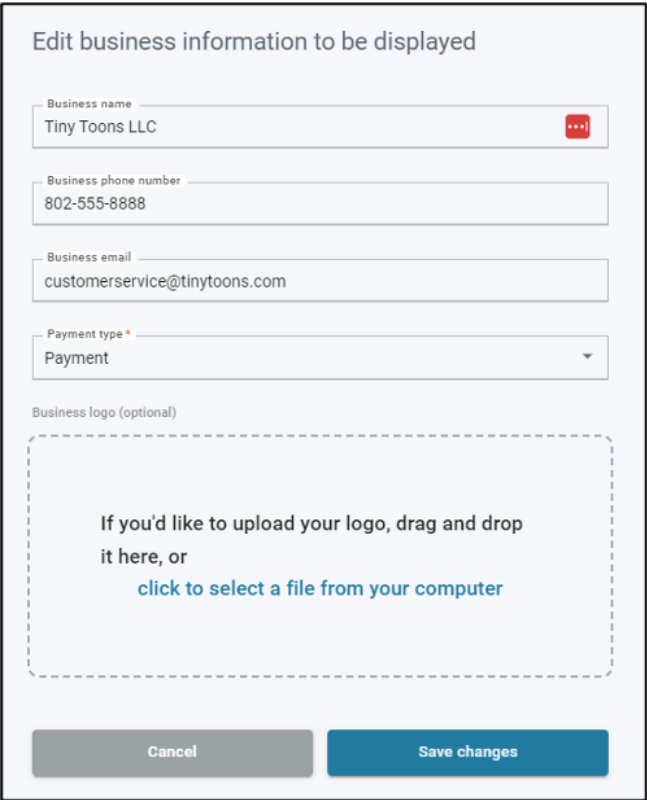


You will see a preview of your payment link.

Click on "Edit Business Information" to make any necessary edits.



Click "Save changes."



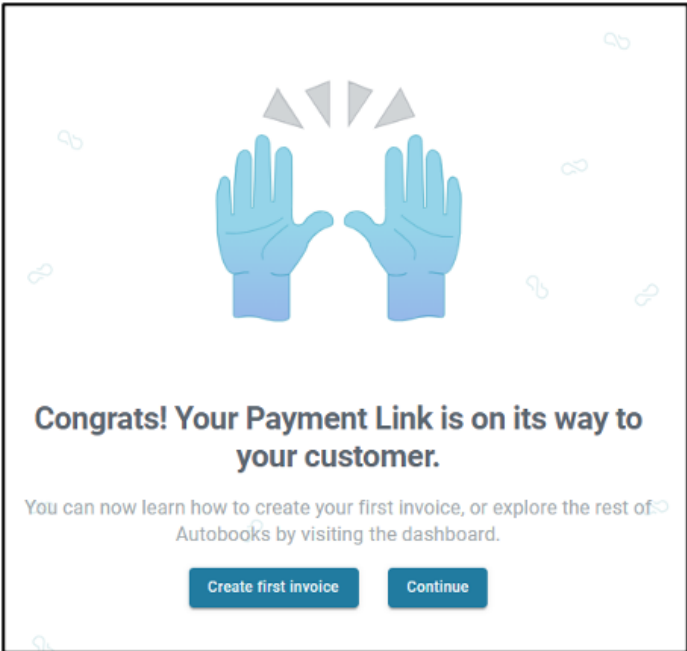
When you email the payment link, it will be sent with your business name as the "From Name."

Before you send, you will need to enter the customer's email address and paste the link into the body of the email.

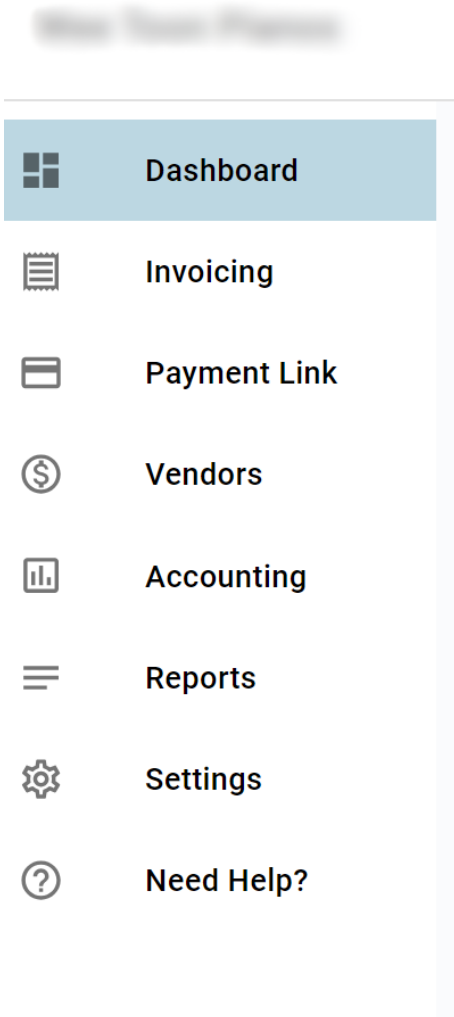
You have the option of sending yourself a copy as well.

Click "Looks good, email my Payment Link" when complete.



Looks good, email my Payment Link



Now that you are all set up, in the future you can access Autobooks via the Dashboard.



**Accept Payments**

 Send an Invoice	 Accept Payments Now
--	--