PACIFIC WESTERN BANK

PWB Digital Invoicing & Payment Acceptance powered by Autobooks Enrollment Guide

UPDATED JANUARY 2023

EQUAL HOUSING LENDER
Member FDIC

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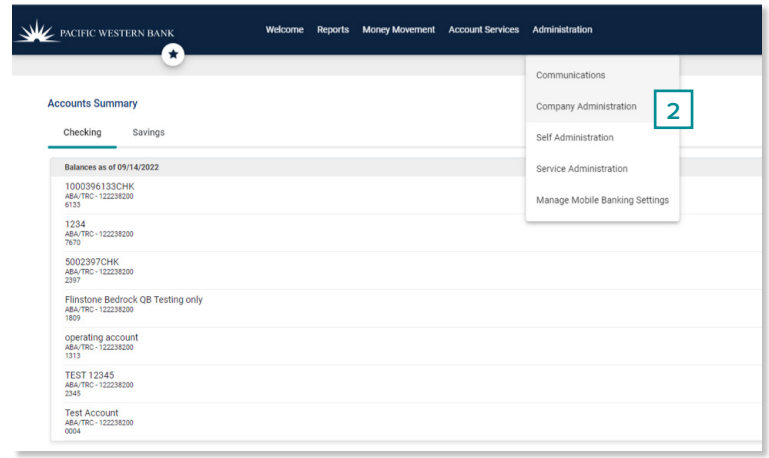
[Contact us](#) or talk to your Relationship Manager for help with the Autobooks enrollment guide.

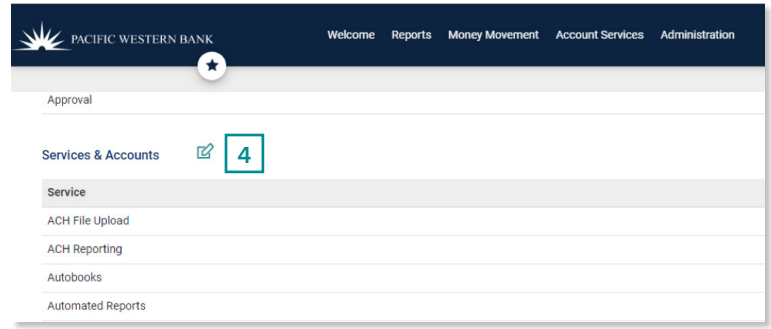
Enable a user for Autobooks (admins only)

Your company's admin user(s) must enable individual users to use PWB Digital Invoicing & Payment Acceptance powered by Autobooks. Follow the instructions below to enable a user:

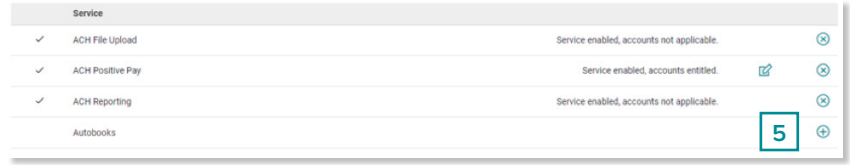
1. Log in to Online Banking.
2. Hover over **Administration** and click **Company Administration.**



3. Select the user to enable.
4. Click the Edit icon next to **Services & Accounts.**



5. Click the plus icon for **Autobooks.**



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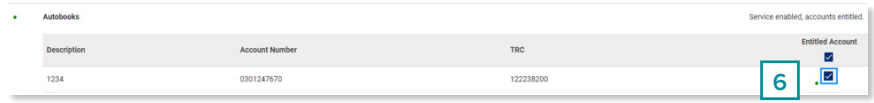
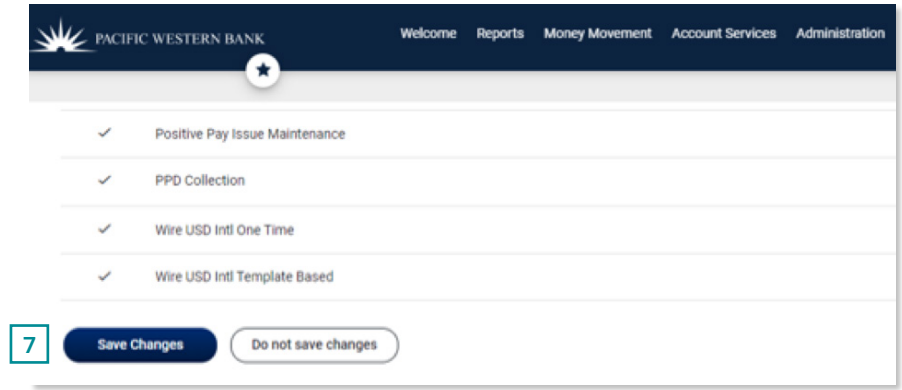
6. Click the check boxes for the accounts for which you want Autobooks enabled.



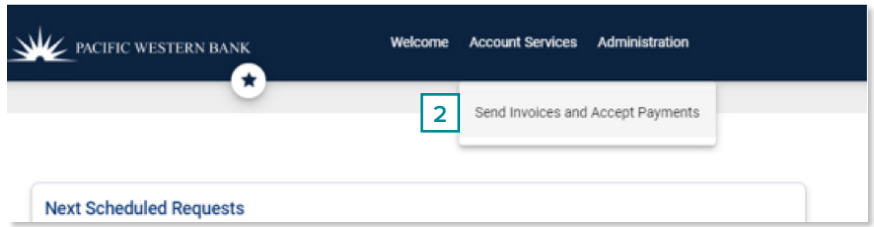
7. Scroll to the bottom of the screen and click **Save Changes.**



Enroll your company

Ensure your company administrator has enabled your user ID for PWB Digital Invoicing & Payment Acceptance powered by Autobooks, then follow the instructions below.

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



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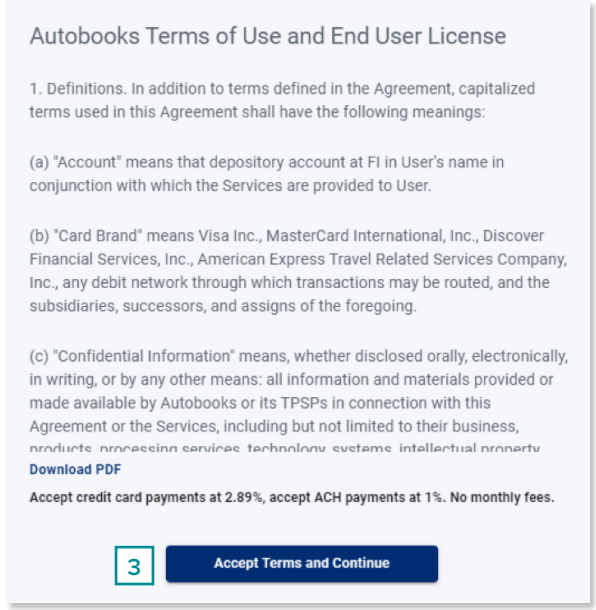
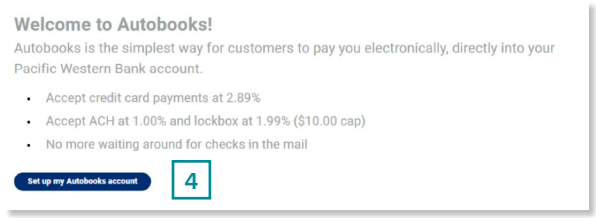
3. Read the terms of use and click **Accept Terms and Continue**.



4. Click **Set up my Autobooks account**.



5. If you have one or more beneficial owners associated with your company, we will auto-populate this information into the enrollment form to accelerate completion. Please skip to step 8 to continue your enrollment.

   If we require more information on the beneficial ownership structure, you will be presented with a webform as shown in step 6.

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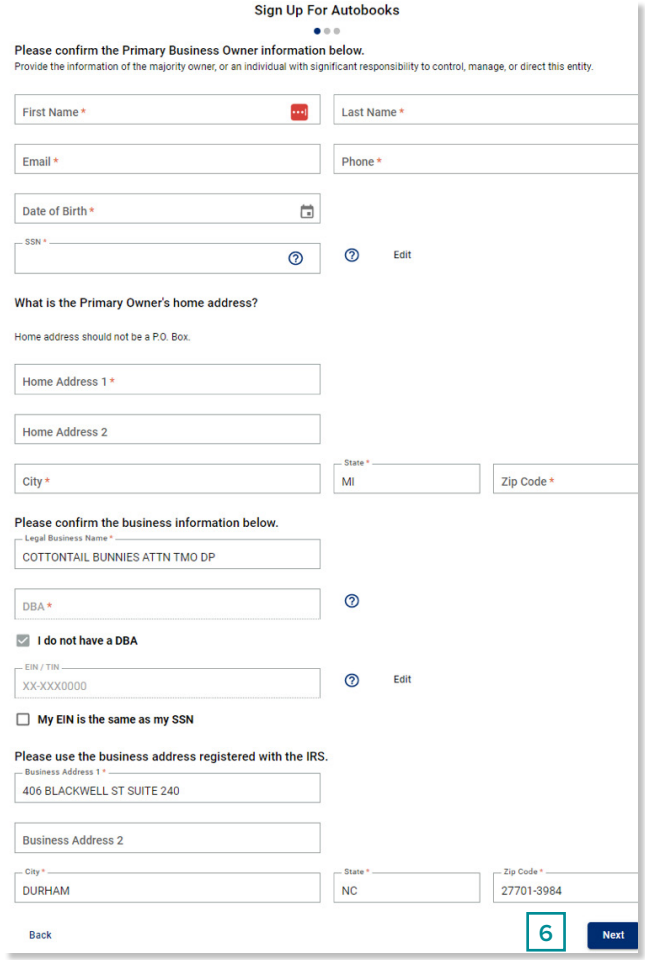
6. Fill in the required Primary Business Owner information and click **Next**.



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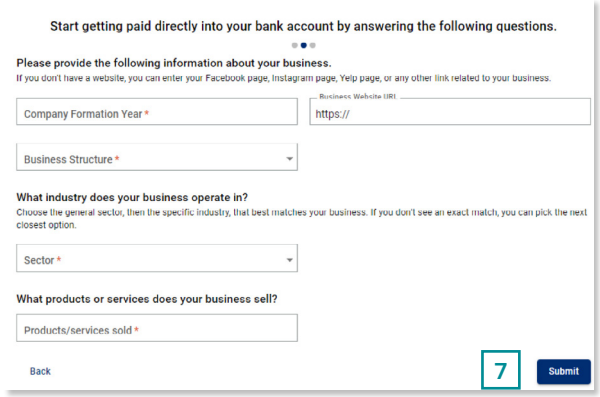
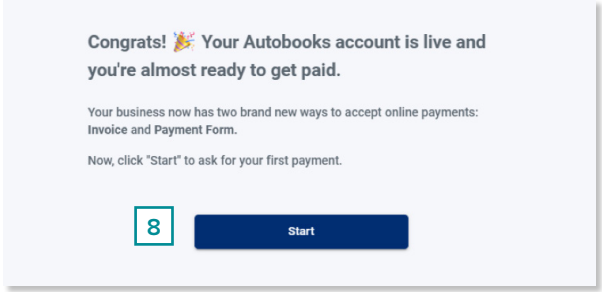
7. Provide the requested information about your business and click **Submit**.

   Note: if you've previously provided your company's beneficial ownership information to us, you will not be asked to complete this step until you create a payment form or send your first invoice.



8. Click **Start**.



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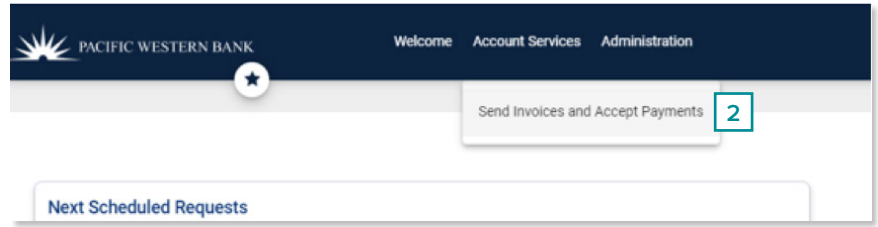
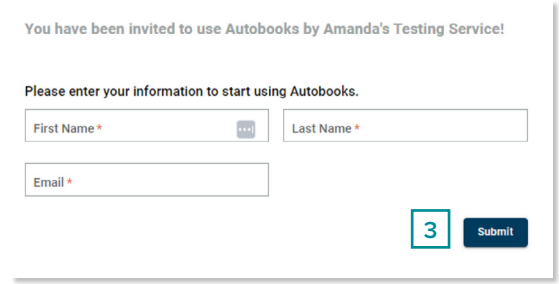
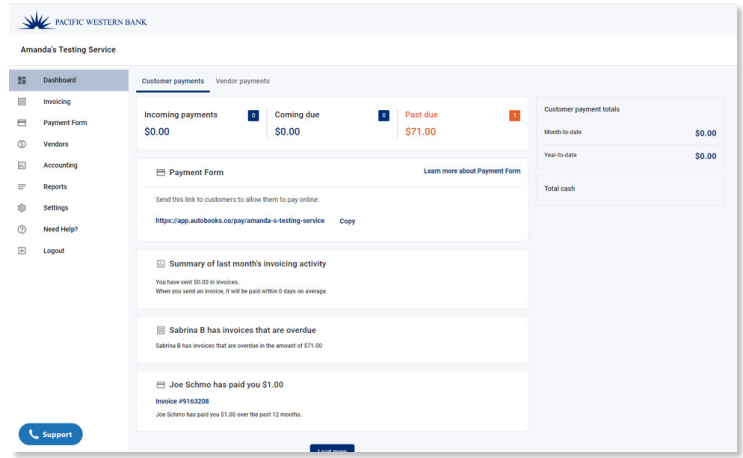
1. Log in to Online Banking.
2. Hover over **Account Services** and click **Send Invoices and Accept Payments**.



3. Fill in your **First Name, Last Name and Email** and click **Submit**.



4. Begin accessing PWB Digital Invoices & Payment Acceptance powered by Autobooks.