



# PWB Digital Invoicing & Payment Acceptance powered by Autobooks Enrollment Guide

UPDATED JANUARY 2023



# Contents

Enable a user  
for Autobooks  
(admins only)

Enroll your company

Enroll a new user

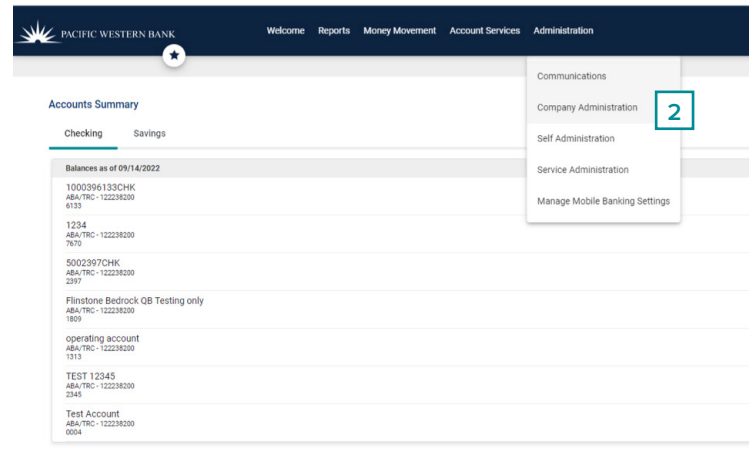
## Questions

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

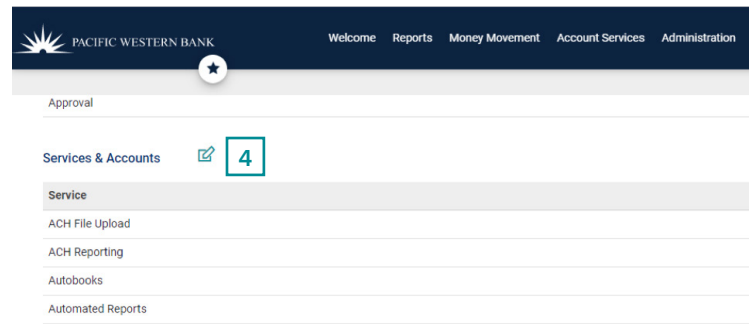
## Enable a user for Autobooks (admins only)

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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Enable a user  
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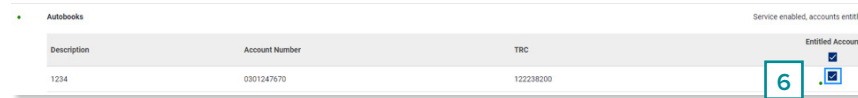
Enroll your company


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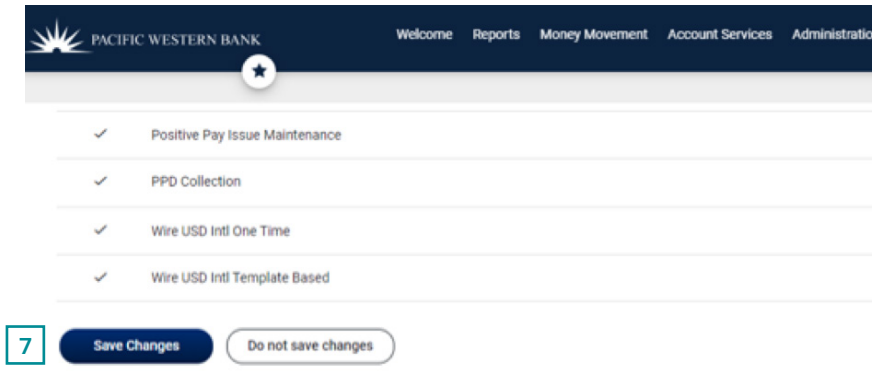
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- Click the check boxes for the accounts for which you want Autobooks enabled.



Description	Account Number	TRC	Service enabled, accounts entitled
1234	0301247670	122238200	<input checked="" type="checkbox"/> 

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



PACIFIC WESTERN BANK

Welcome Reports Money Movement Account Services Administration

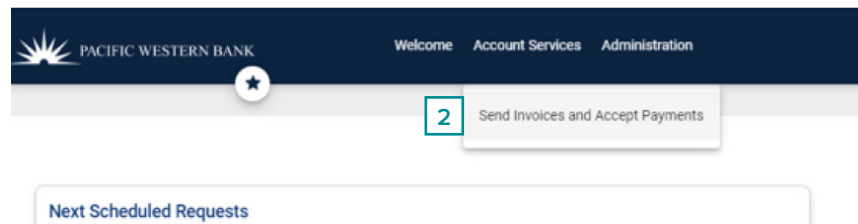
- ✓ Positive Pay Issue Maintenance
- ✓ PPD Collection
- ✓ Wire USD Intl One Time
- ✓ Wire USD Intl Template Based

**7** Save Changes Do not 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.

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



PACIFIC WESTERN BANK

Welcome Account Services Administration

**2** Send Invoices and Accept Payments

Next Scheduled Requests

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3. Read the terms of use and click **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 conjunction with which the Services are provided to User.

(b) "Card Brand" means Visa Inc., MasterCard International, Inc., Discover Financial Services, Inc., American Express Travel Related Services Company, Inc., any debit network through which transactions may be routed, and the subsidiaries, successors, and assigns of the foregoing.

(c) "Confidential Information" means, whether disclosed orally, electronically, in writing, or by any other means: all information and materials provided or made available by Autobooks or its TPSPs in connection with this Agreement or the Services, including but not limited to their business, products, processing services, technology, systems, intellectual property.

[Download PDF](#)

Accept credit card payments at 2.89%, accept ACH payments at 1%. No monthly fees.

3

Accept Terms and Continue

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

### Welcome to Autobooks!

Autobooks is the simplest way for customers to pay you electronically, directly into your Pacific Western Bank account.

- Accept credit card payments at 2.89%
- Accept ACH at 1.00% and lockbox at 1.99% (\$10.00 cap)
- No more waiting around for checks in the mail

Set up my Autobooks account

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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**.

**Sign Up For Autobooks**

● ● ●

Please confirm the Primary Business Owner information below.  
Provide the information of the majority owner, or an individual with significant responsibility to control, manage, or direct this entity.

First Name *	Last Name *	
Email *		
Phone *		
Date of Birth *		
SSN *	Edit	

**What is the Primary Owner's home address?**

Home address should not be a P.O. Box.

Home Address 1 *		
Home Address 2		
City *	State *	Zip Code *
	MI	

**Please confirm the business information below.**

Legal Business Name *		
COTTONTAIL BUNNIES ATTN TMO DP		
DBA *	?	
<input checked="" type="checkbox"/> I do not have a DBA		
EIN / TIN	Edit	
XX-XXX-XXXX		
<input type="checkbox"/> My EIN is the same as my SSN		

**Please use the business address registered with the IRS.**

Business Address 1 *		
406 BLACKWELL ST SUITE 240		
Business Address 2		
City *	State *	Zip Code *
DURHAM	NC	27701-3984

Back **6** 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.

Start getting paid directly into your bank account by answering the following questions.

Please provide the following information about your business.  
If you don't have a website, you can enter your Facebook page, Instagram page, Yelp page, or any other link related to your business.

Company Formation Year \*  Business Website URL

Business Structure \*

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 \*

What products or services does your business sell?  
Products/services sold \*

Back 7 Submit

8. 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 Form.

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

8 Start

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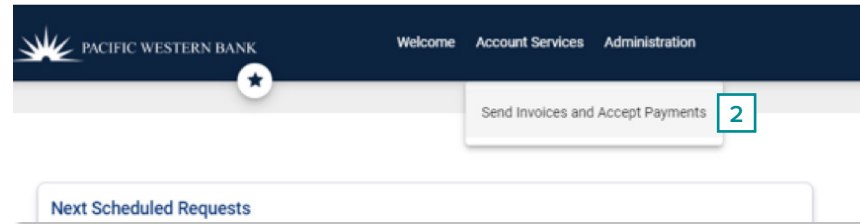
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## Enroll a new user

Ensure your company administrator has enabled your user ID for PWB Digital Invoices and 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**.



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

A screenshot of the Autobooks enrollment form. At the top, it says 'You have been invited to use Autobooks by Amanda's Testing Service!'. Below this, it says 'Please enter your information to start using Autobooks.' There are three input fields: 'First Name \*', 'Last Name \*', and 'Email \*'. A red box with the number '3' is placed over the 'Submit' button.

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

