



USER GUIDE

TCCU Online for Business

Invoicing and Payments

(Autobooks)

Version 0.01.01.01.2023

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Invoicing and Payments - Getting Started With Autobooks

Autobooks is a feature that is provided to all TCCU Online for Business profiles that offers payment processing and invoice creation.

The user is directed to Autobooks upon clicking "Invoicing and Payments".

The first time that a user accesses Autobooks or if any changes have been made to the terms they will first be prompted to review and accept the Autobooks Terms of Use and End User License. If the terms are not accepted use of the service is not granted.

An email will need to be provided for contact purposes. Autobooks may need to reach out for additional information.

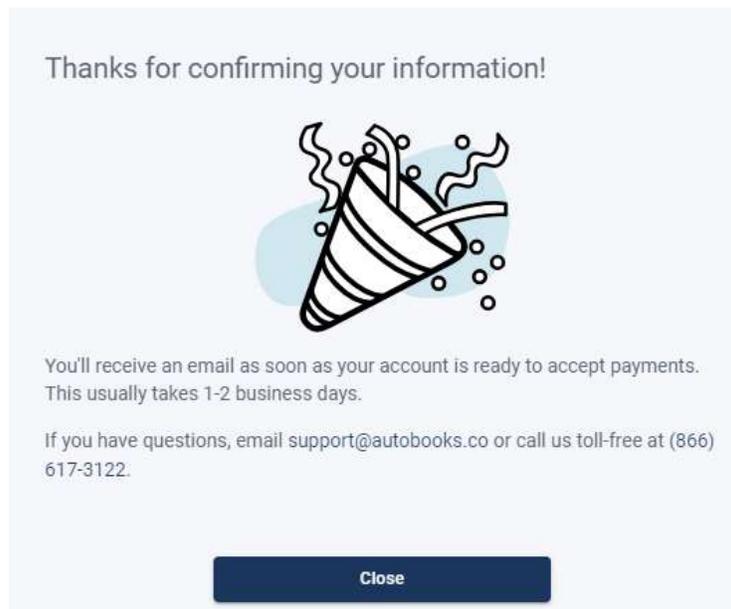
First Time Login

1. Accept the Terms and Conditions
2. Input the main email address for the user that will be accessing Autobooks. Preferably a Primary or Secondary Admin.
3. Autobooks will request additional information in order to gauge the proper underwriting to meet your business's needs all of the personal information entered must be the business owner's. The information requested may be but is not limited to:

Full Name, Phone Number, Home Address, Date of Birth, Business's Address, Business Formation Year, Business Structure, The Business's Website, Any DBA's, Industry, Products Offered, Payment and Revenue Estimates, Social Security Number, EIN, Ownership Percentages

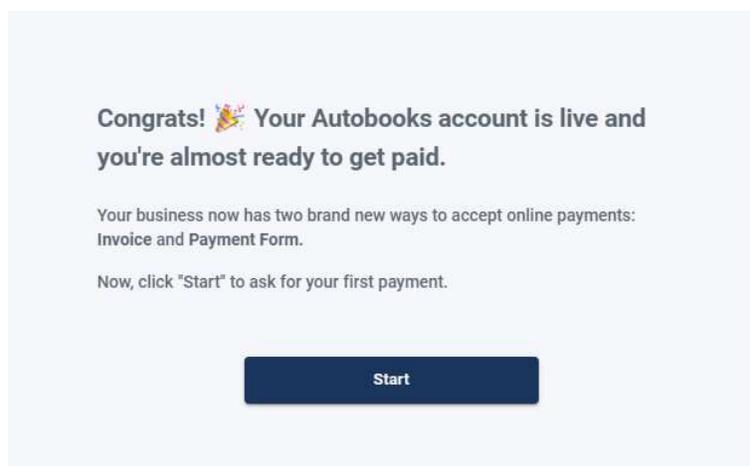
Note: If any of the requested information is not provided underwriting cannot be properly performed. A Town and Country Representative or Autobooks representative may reach out by email or phone to set up a time to finish registration.

Upon completion if all of the information was entered a confirmation will pop up.



Once the business is approved an approval message will pop up on your next login.

Note: Most registrations are approved immediately, however in certain cases it can take up to 2 business days.



The first steps that Autobooks will allow are to create your first invoice or to access your payment form. Follow the below instructions based on each selection.

Autobooks Help

Autobooks offers direct assistance with their own proprietary service team. Utilize the below information for assistance with Autobooks:

Website: <https://help.autobooks.co/knowledge> – Contains many help guides, reference materials, and video demonstrations.

Phone: 866-617-3122 – Contact the Autobooks team for assistance over the phone. Users are also able to request appointments with an Autobook representative for assistance with setup.