



Common Customer Questions

SEND AN INVOICE/ ACCEPT A PAYMENT

Below are a few questions you and your team may be asked about the Send an Invoice and Accept a Payment features that appear in FIS digital banking. As always, if you face any questions that you'd like help answering, don't hesitate to reach out to our partner, Autobooks, at (866) 617-3122 or Support@autobooks.co.

Q: What is Send an Invoice?

A: Send an Invoice is a feature that allows you to send an invoice to a customer, and collect payment electronically (credit card, debit card, bank transfer) for that invoice.

Q: What is Accept a Payment?

A: Accept a payment is a feature that provides you with a unique payment link. This payment link leads to a payment form (displayed in a secure web browser). Your customers (or donors, if you have a non-profit organization) complete the form to send you a payment (or donation) electronically. This feature is perfect for those businesses that need a flexible way to accept payments from customers, yet don't create invoices.

Q: Who are the features for?

A: The customer must have access to online banking to enroll in either feature. The following types of businesses are great fits:

- Any business that sends a bill/invoice for its product or service.
- Service based businesses.
- Non-profits seeking to collect donations online.

Q: What are the benefits to using the Send an Invoice feature?

A: With this feature, you can:

- Create professional, custom invoices and send them electronically or physically to your customers in seconds.
- Accept payments by credit card, debit card, or bank transfer direct to your bank account.
- Keep track of which customer has paid you, and how much.

Q: What are the benefits to using the Accept a Payment feature?

A: With this feature, you can:

- Share your custom payment link everywhere you communicate with customers: via text message, email, on your business website, and social media.
- Use the Accept Payment Mobile App (available for both Android and iOS) to collect payments when meeting with customers face to face.
- Accept payment by credit card, debit card, or bank transfer direct to your bank account.
- Keep track of which customer has paid, and how much.

Q: How do I sign up to try it?

A: You can enroll right inside of online banking by clicking on the feature to get started. If you need assistance, you can also contact the Autobooks team at Support@autobooks.co.

Q: Do I have to download any software to use either feature?

A: No downloads of any kind are required. The features live completely inside of online banking.

Feel free to email the Autobooks team any time at Support@autobooks.co or call them between 9 a.m. and 6 p.m. Eastern time at 866-617-3122.