



PACIFIC WESTERN BANK

PWB Digital Invoicing & Payment Acceptance powered by Autobooks Invoice Guide

UPDATED JANUARY 2023



Contents

Send your first invoice

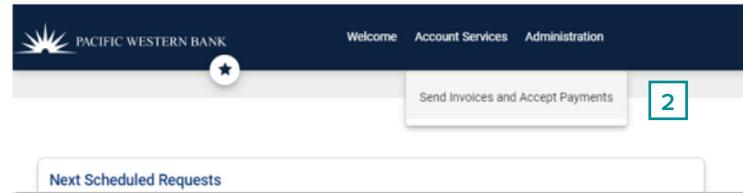
Questions

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

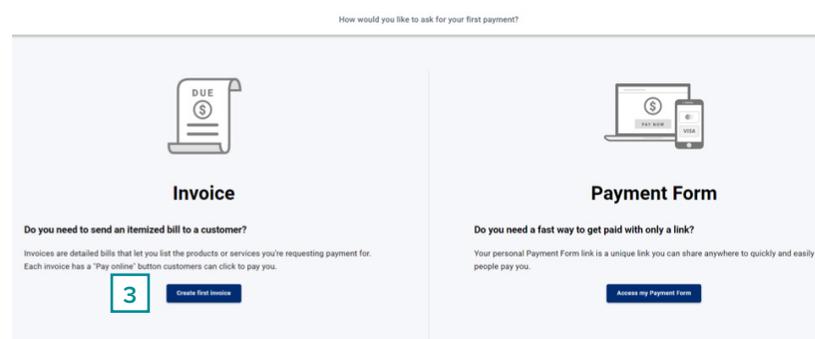
Send your first invoice

Ensure your company administrator has enabled your user ID for Autobooks, then follow the instructions below.

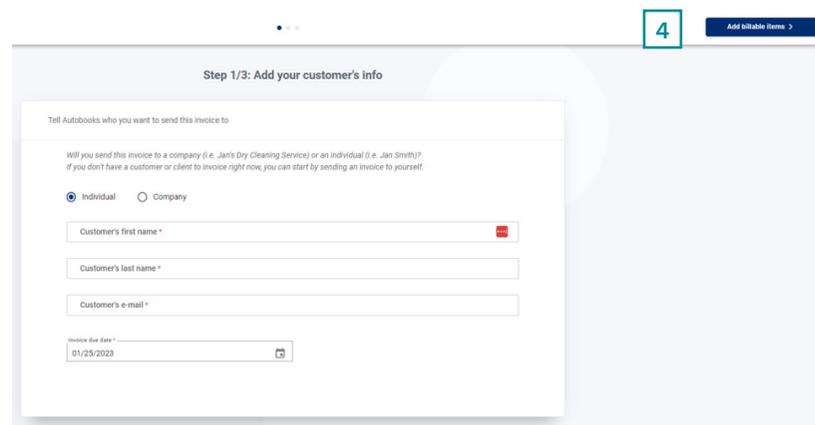
1. Log in to Online Banking.
2. Hover over **Account Services** and click **Send Invoices and Accept Payments**.



3. Click **Create first invoice**.



4. Fill in your customer's information and click **Add billable items**.

A screenshot of the 'Step 1/3: Add your customer's info' form. The form is titled 'Tell Autobooks who you want to send this invoice to'. It includes a question: 'Will you send this invoice to a company (i.e. Jan's Dry Cleaning Service) or an individual (i.e. Jan Smith)? If you don't have a customer or client to invoice right now, you can start by sending an invoice to yourself.' Below this, there are radio buttons for 'Individual' (selected) and 'Company'. There are input fields for 'Customer's first name', 'Customer's last name', and 'Customer's e-mail'. There is also a date picker for 'Invoice due date' set to 01/25/2023. A red box with the number '4' is placed over the 'Add billable items' button in the top right corner.

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5. Add the product(s) or service(s) info for which you're billing – including quantity, price per unit and a description of the product(s) or service(s). Follow steps 6 through 10 to add sales tax. Follow [steps 11 and 12](#) to add line items to your invoice. To skip these steps and proceed to invoice review, proceed to [step 13](#).
6. **OPTIONAL:** Click **Turn on sales tax** to automatically compute sales tax and add to the invoice.

Step: 2/3 Add the products or services you're billing for

Now, tell us what you're invoicing for

Title of your product or service *

Quantity * 1 Price per unit * \$0.00 Amount \$0.00

Description of your product or service

6 + Turn on sales tax Add another Total cost: \$0.00

7. **OPTIONAL:** Toggle **Sales tax is turned off** to on.

Sales tax

While sales tax is turned on, you can decide which invoice line items have sales tax applied

Sales tax is turned off 7

Cancel Save changes

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- OPTIONAL:** Enter the desired sales tax rate and click **Save changes**.

Sales tax

While sales tax is turned on, you can decide which invoice line items have sales tax applied

Sales tax is turned on

Sales tax rate: 0 % **8**

Cancel Save changes

- OPTIONAL:** Check the box for **Apply Sales Tax**.

Step: 2/3 Add the products or services you're billing for

Now, tell us what you're invoicing for

Title of your product or service *
TEST Product TEST

Quantity * 1 Price per unit * \$100.00 Amount \$100.00

Description of your product or service
Still just a TEST

Apply Sales Tax **9**

Edit sales tax Add another

Subtotal: \$100.00
Sales Tax (8%): \$8.00
Total Cost: \$108.00

- OPTIONAL:** Repeat step 9 as needed to add sales tax to additional line items.

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11. **OPTIONAL:** Click **Add another** to add line items to this invoice.

12. **OPTIONAL:** Repeat [step 5](#) as needed for each additional line item.
13. Once you've filled in all required information and included any needed sales tax and/or additional line items, click **Review invoice** (top right corner of screen).
14. Scroll down as needed to review your entire invoice.
15. **OPTIONAL:** To update your business information or add your logo to the invoice, click **EDIT BUSINESS INFORMATION**. To skip editing and send your invoice, proceed to [step 17](#).

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16. **OPTIONAL:** Update your business information as needed and/or add your logo. Click **Save changes**.

Edit business information to be displayed

Business name
ABC Test Account

Business phone number
561-398-3372

Business email
jmoas@pacwco.com

Business logo (optional)

If you'd like to upload your logo, drag and drop it here, or click to select a file from your computer

Cancel Save changes

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17. Repeat [step 14](#) – if all information is correct, click **Looks good, send invoice**.

Step 3/3: Review and send your invoice

Please review your invoice. If you need to make any changes, return to the previous steps.

Invoice

\$100.00
Amount due

01/31/2023
Due date

ABC Test Account
345 3rd Street
JMOAS@PACWCO.COM

Item	Description	Quantity	Unit Price	Total Price
TEST Invoice Required		1	\$100.00	\$100.00

Subtotal: \$100.00
Tax: \$0.00
Total: \$100.00

ABC Test Account
456 4th Street, Suite 100
JMOAS@PACWCO.COM

Looks good, send invoice Cancel

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18. **Congratulations! You've sent your first invoice.**

