



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

UPDATED JANUARY 2023



# Contents

## Send your first invoice

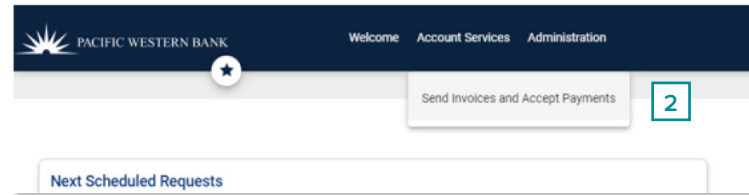
## Questions

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

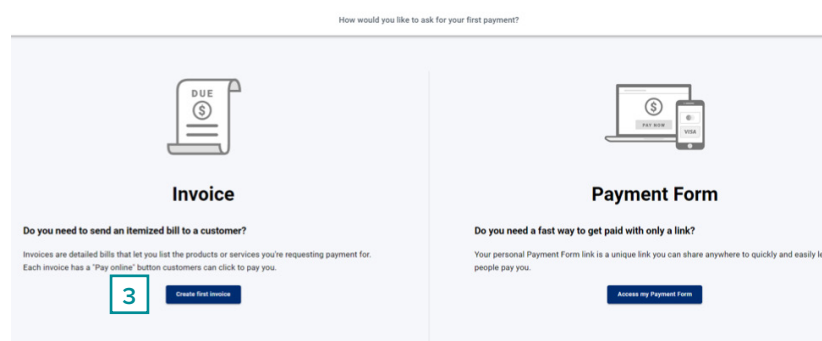
## Send your first invoice

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

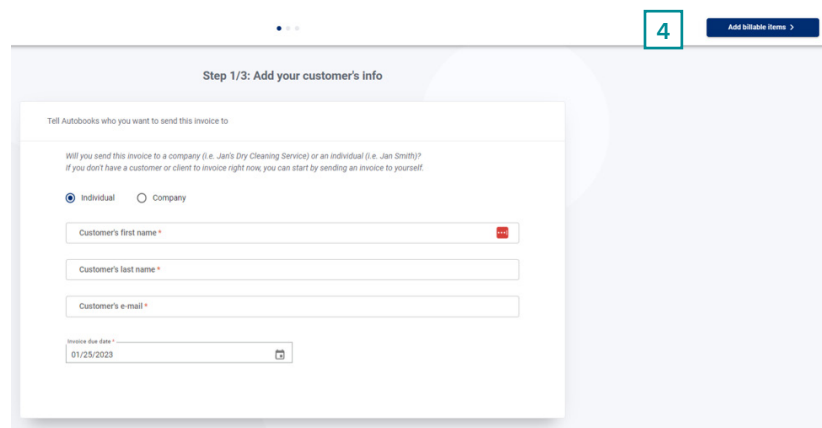
1. Log in to Online Banking.
2. Hover over **Account Services** and click **Send Invoices and Accept Payments**.



3. Click **Create first invoice**.



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



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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

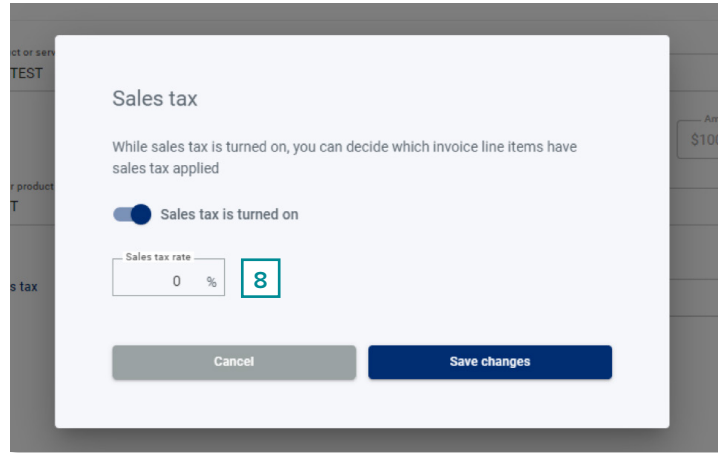
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8. **OPTIONAL:** Enter the desired sales tax rate and click **Save changes**.

A modal window titled "Sales tax" with a subtitle "While sales tax is turned on, you can decide which invoice line items have sales tax applied". It features a toggle switch labeled "Sales tax is turned on" which is currently turned on. Below the toggle is a "Sales tax rate" input field showing "0 %". A red box with the number "8" highlights the input field. At the bottom are "Cancel" and "Save changes" buttons.

Sales tax

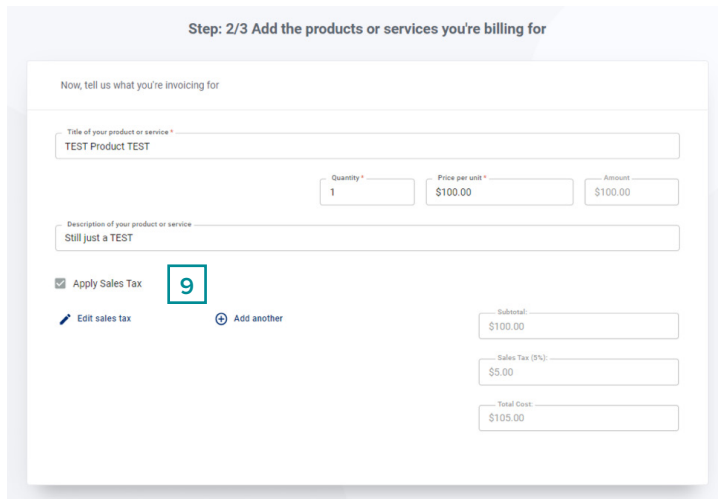
While sales tax is turned on, you can decide which invoice line items have sales tax applied

☒ Sales tax is turned on

Sales tax rate: 0 %

Cancel Save changes

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

A form titled "Step: 2/3 Add the products or services you're billing for". It has a subtitle "Now, tell us what you're invoicing for". The form includes a "Title of your product or service" field with "TEST Product TEST" entered. Below this are fields for "Quantity" (1), "Price per unit" (\$100.00), and "Amount" (\$100.00). There is a "Description of your product or service" field with "Still just a TEST" entered. A checkbox labeled "Apply Sales Tax" is checked, and a red box with the number "9" highlights it. Below the checkbox are links for "Edit sales tax" and "Add another". On the right side, there are summary fields: "Subtotal" (\$100.00), "Sales Tax (3%)" (\$5.00), and "Total Cost" (\$105.00).

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

Edit sales tax Add another

Subtotal: \$100.00

Sales Tax (3%): \$5.00

Total Cost: \$105.00

10. **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.

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

Call just a TEST

☒ Apply Sales Tax

Title of your product or service \*

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

Description of your product or service

☐ Apply Sales Tax

[Edit sales tax](#) [Add another](#) 11

Subtotal \$100.00

Sales Tax (0%) \$0.00

Total Due \$100.00

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](#).

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

\$105.00 Balance due Due

01/31/2023 Due date

ABC Test Account  
561-398-3372  
jmosa@pacwest.com

Customer Created date Due date Invoice #

Need to update your business info or add your logo? Click below

EDIT BUSINESS INFORMATION 15

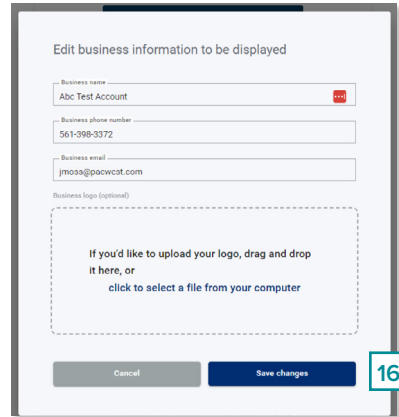
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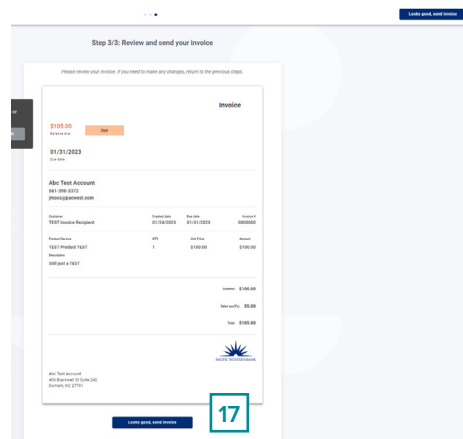
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16. **OPTIONAL:** Update your business information as needed and/or add your logo. Click **Save changes**.



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



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

