

# How to create a customized in-branch brochure and inserts.

Now you can give your small business members a complete picture of business bill pay and its real-world benefits.

Here's a quick overview of the customized brochure and inserts.

## Brochure

*Who can use it:* Every financial institution offering business bill pay.

*What it covers:* The brochure defines what the product is, what it does and how the key features enable small businesses to more efficiently and effectively handle their back office functions. The brochure also provides detailed instructions on the steps members need to take to enroll.

## Insert 1 / Account-to-account transfer

*Who can use it:* Institutions that offer this business bill pay feature.

*What it covers:* How small businesses can transfer funds between accounts on their schedule and improve cash flow.

## Insert 2 / Automated payroll deposit and expense reimbursement

*Who can use it:* Institutions that offer this business bill pay feature.

*What it covers:* How small businesses can send paychecks and reimbursements, and handle payroll electronically.

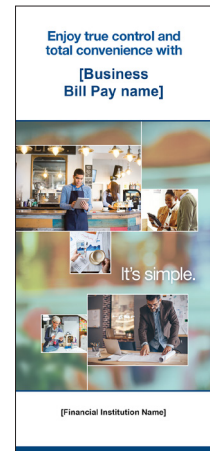
You can use the brochure with the appropriate inserts as a handout, place them in a mailing to your members or display them as a takeaway. This will allow small business members to either learn more about business bill pay or get started right away.

This informative piece is also a great resource to provide to any small business members who open a checking account or loan account, or for any business owner who inquires about your online banking services.

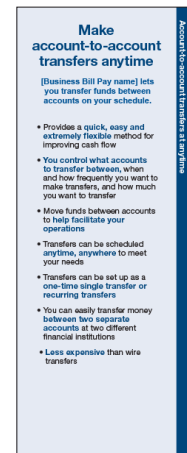
Here are the instructions to create your customized brochure and inserts in three steps.

## Step One: You download the brochure

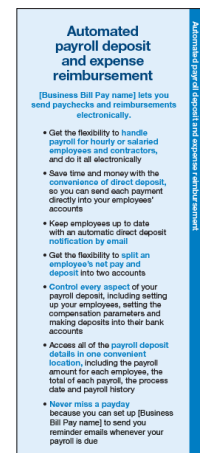
Click on the **Download** button to get a customizable Adobe PDF file of the brochure and appropriate inserts downloaded to your desktop.



Brochure



Insert 1



Insert 2

## Step Two: You customize the brochure text

Open the PDF in Adobe Reader, Adobe Acrobat or Adobe Professional.

Now **see the final page of this document for customizable text areas within the brochure.**

The brochure text can easily be customized with your financial institution's information simply by typing in the designated areas as shown on the final page of this document.

### Important note:

Please double check the accuracy of your customized text.

## Step Three: Print using a local printer

After you add your customized text, save your customized PDF and/or brochure insert PDFs on a disk or flash drive and take it to a local printer.

Your printer can add your logo in the area shown on the final page of this document.

It is recommended that you **take a high-resolution JPEG (300dpi and CMYK), high-resolution TIF (300dpi and CMYK) or vector EPS (CMYK) file of your logo to your printer** so they can add it in for you.

### Important notes:

If you have **Adobe Acrobat 9 Standard or Adobe Acrobat 9 Professional**, you can add the logo yourself. [Click here for those instructions.](#)



### Here are the sizes:

**Brochure:** Flat size is 7.5"W x 8.5"H. Finished size when folded is 3.75"W x 8.5"H.

**Insert 1 / Account-to-account transfer:** 3.25"W x 8.5"H.

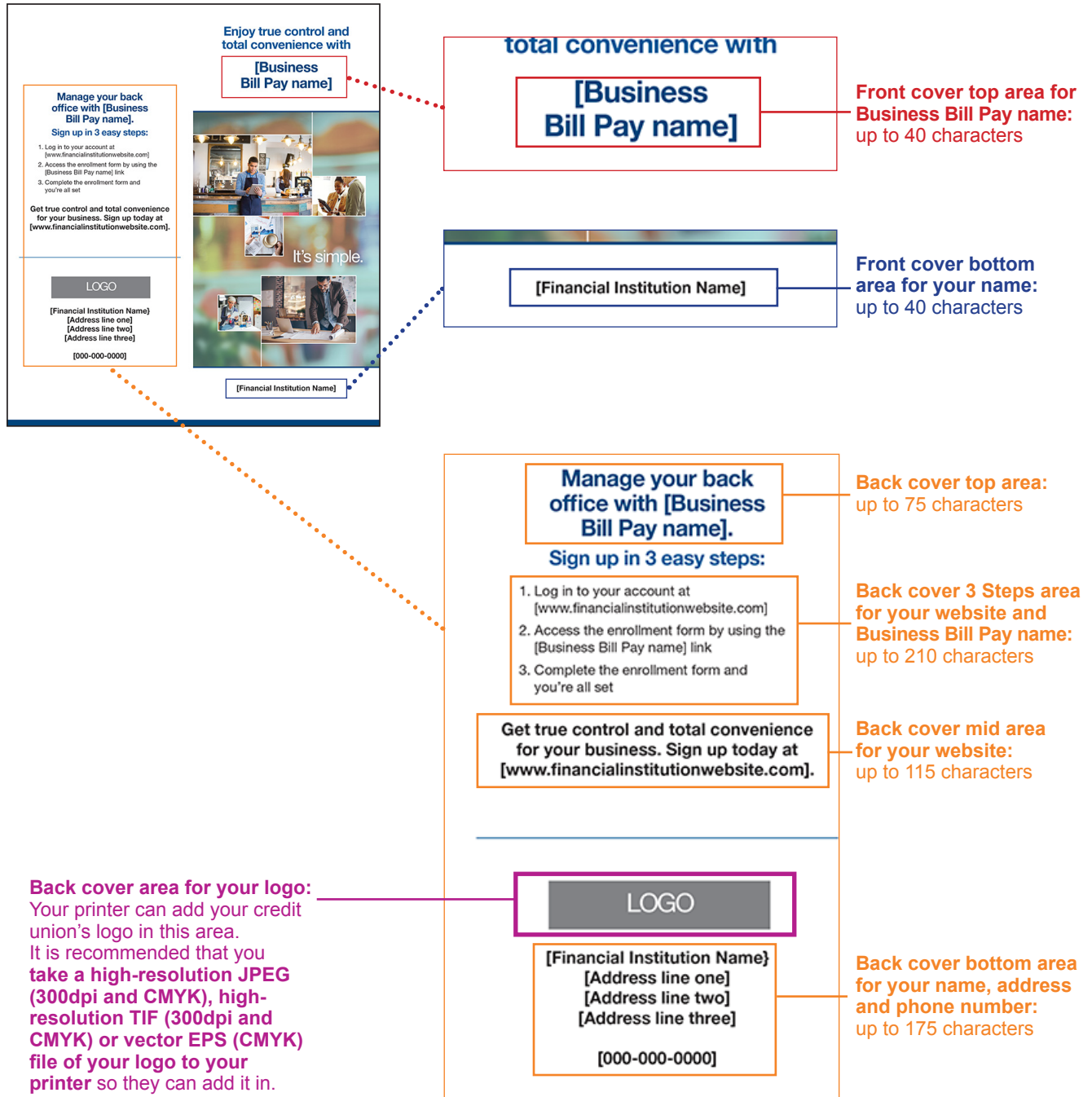
**Insert 2 / Automated payroll deposit and expense reimbursement:** 3.5"W x 8.5"H.

When the brochures are printed and folded, and any appropriate inserts are added, consider handing them out to new small business members, displaying them within member kiosks or inserting them into mailings.

# Customizable areas in brochure: Front and back cover.

Before printing, the brochure needs to be customized in several places. This includes the front cover, back cover and inside spread. The text can be customized simply by typing in the designated areas as shown below. Your logo can be added by your printer in the logo area on the back cover.

Brochure front and back cover



**Important note:** Please double check the accuracy of your customized text.

# Customizable areas in brochure: Inside spread.

## Brochure inside spread

**Discover all the advantages.**

As a small business owner, you want it all – true control of your finances, total convenience on your schedule and customization to do things your way. [Business Bill Pay name] gives you all of this – and that's just the start.

**It's also a better way to pay bills and invoices.**

[Business Bill Pay name] lets you control what is paid, how much is paid and when it's paid.

- Make payments more quickly and easily and gain greater control over cash flow
- Get anytime, anywhere access online for more convenience paying your bills
- Depend on added security because paying bills online is safer than mailing checks
- Save time by conveniently importing payees from Quicken® or QuickBooks®
- Pay multiple invoices for a single payee all at one time and account for them in a single location
- Easily set up recurring payments for monthly bills

**Delegate tasks and set permission controls.**

You maintain control of all the settings.

- Delegate the payment tasks you want, such as paying utilities and suppliers, running the daily or weekly payment history
- Set permission controls so you're always in charge of who can make payments, which payments they can make and the maximum payment amount
- Set up final approvals so you can give the go-ahead before any payments are made

**Get custom reports with detailed information.**

Access the information you need whenever you need it.

- Run audit reports and customize them for the precise payment information you need
- Track your company spending and payment history in just a few clicks
- View the payment activity of authorized users and keep track of the payments they have made
- Greatly reduce your paperwork and minimize manual record keeping

**Sign up for [Business Bill Pay name] in 3 easy steps:**

1. Log in to your account at [www.financialinstitutionwebsite.com]
2. Access the enrollment form by using the [Business Bill Pay name] link
3. Complete the enrollment form and you're all set

**Get true control and total convenience.**

Visit [www.financialinstitutionwebsite.com] and sign up today.

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**Discover all the advantages.**

As a small business owner, you want it all – true control of your finances, total convenience on your schedule and customization to do things your way. [Business Bill Pay name] gives you all of this – and that's just the start.

**It's also a better way to pay bills and invoices.**

[Business Bill Pay name] lets you control what is paid, how much is paid and when it's paid.

- Make payments more quickly and easily and gain greater control over cash flow
- Get anytime, anywhere access online for more convenience paying your bills

Inside spread top area for Business Bill Pay name: up to 245 characters

Inside spread mid area for Business Bill Pay name: up to 110 characters

Inside spread bottom area 1 for Business Bill Pay name: up to 70 characters

**Sign up for [Business Bill Pay name] in 3 easy steps:**

1. Log in to your account at [www.financialinstitutionwebsite.com]
2. Access the enrollment form by using the [Business Bill Pay name] link
3. Complete the enrollment form and you're all set

**Get true control and total convenience.**

Visit [www.financialinstitutionwebsite.com] and sign up today.

Inside spread bottom area Step 1 for your website: up to 70 characters

Inside spread bottom area Step 2 for Business Bill Pay name: up to 90 characters

Inside spread bottom area 2 for your website: up to 65 characters

**Important note:** Please double check the accuracy of your customized text.