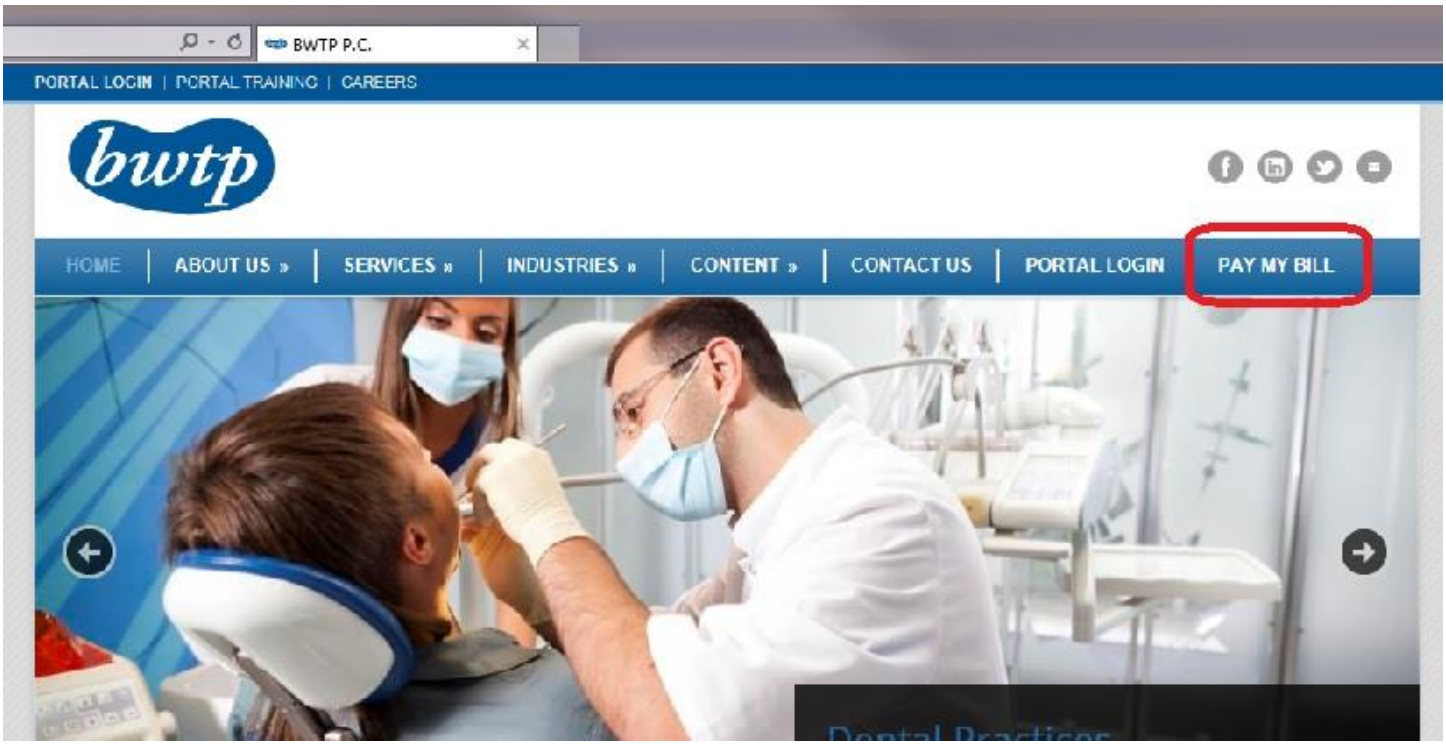
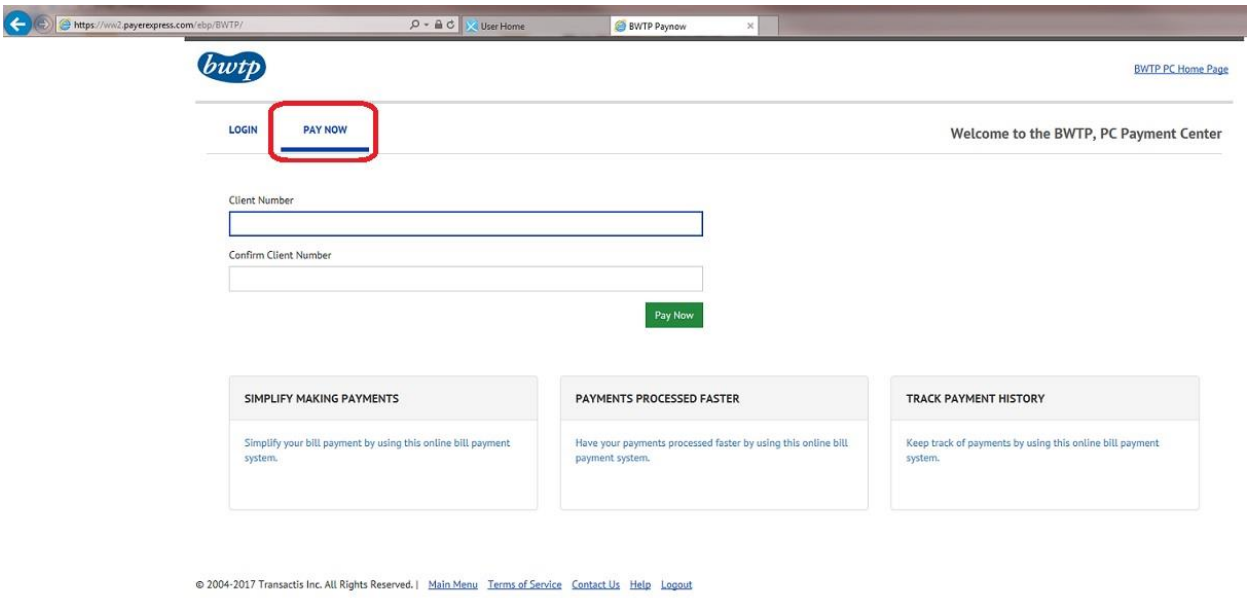
Setting Up A Recurring Payment – Fixed Payment/Retainer

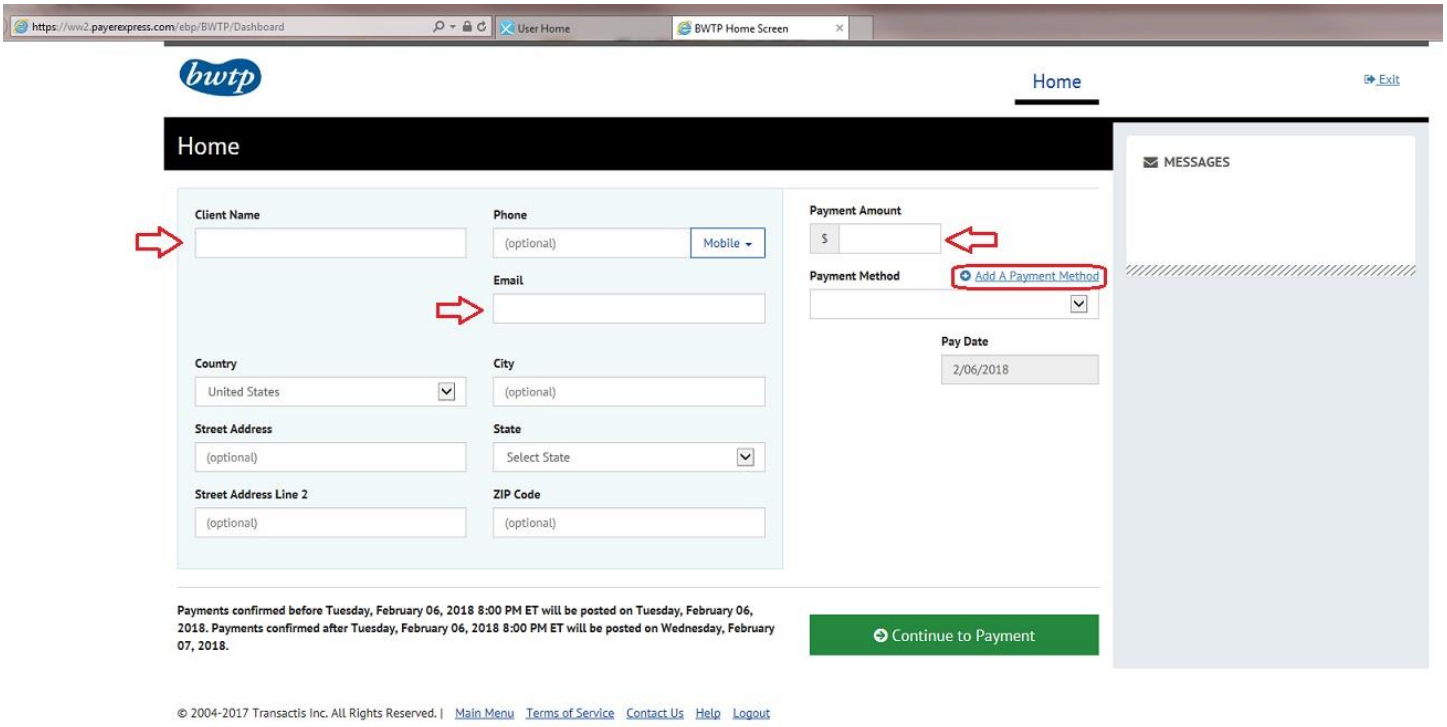
1. Go to www.bwtpcpa.com and click on “Pay My Bill” on the right hand side.



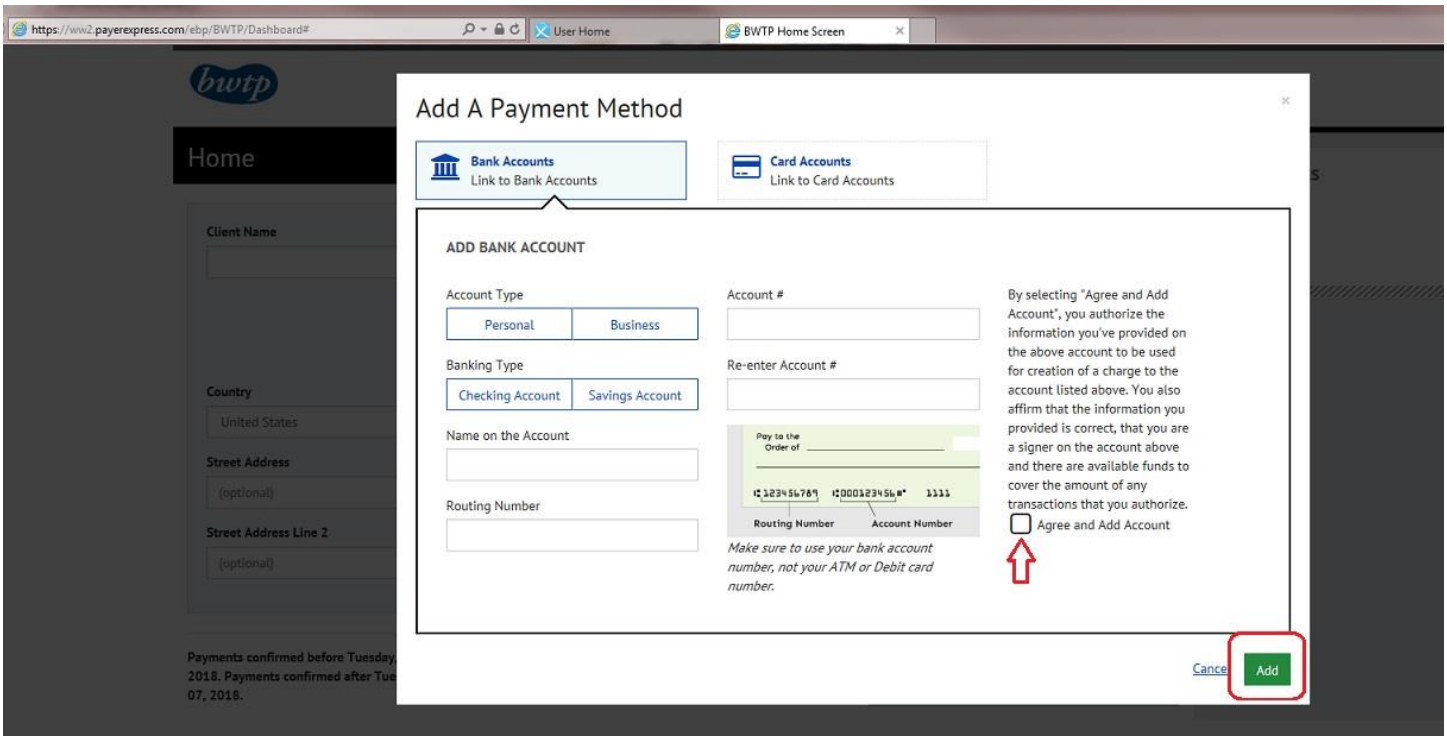
2. Type in your client number and click “Pay Now”.

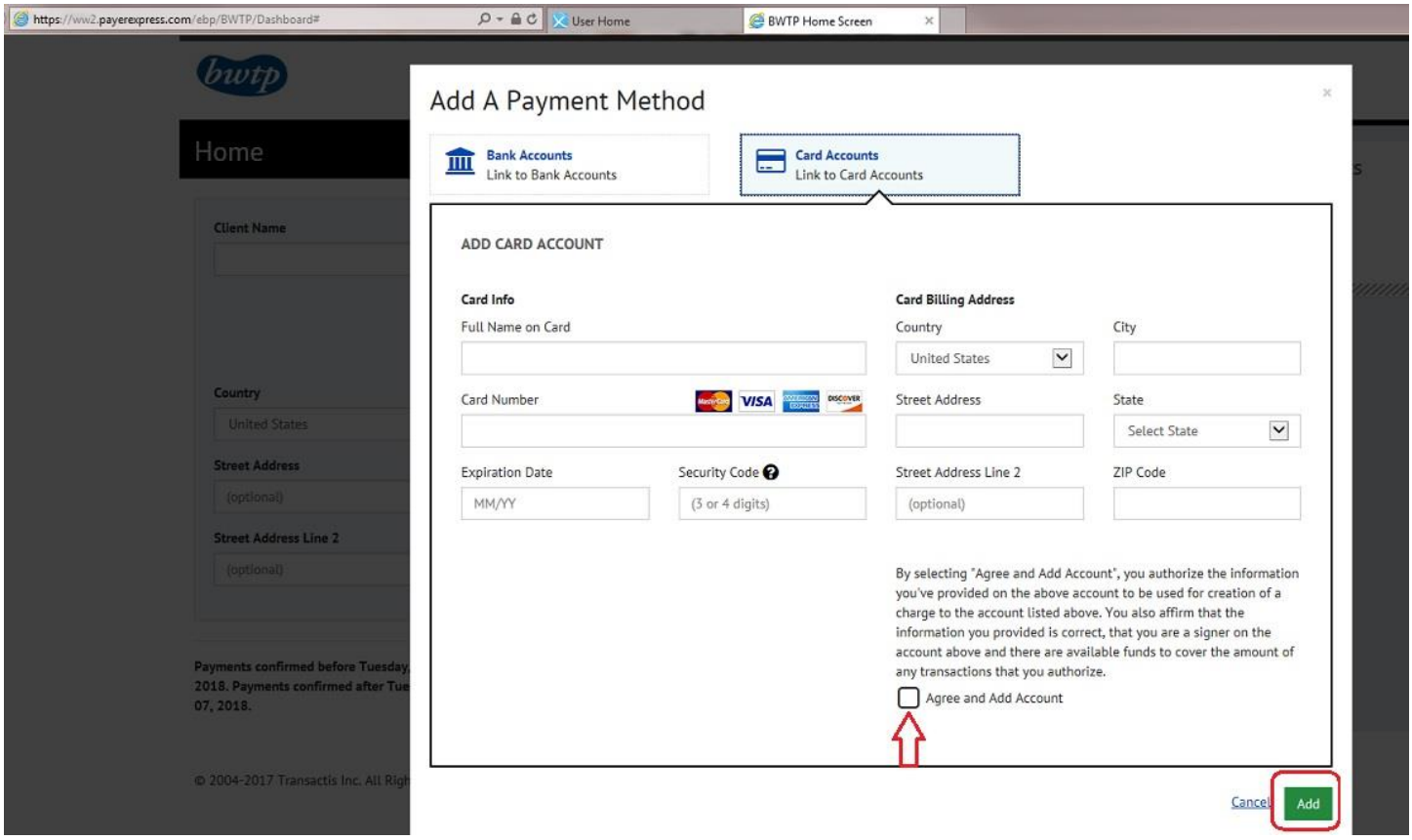


3. Enter in the required information (Client Name, Email, Payment Amount). Then click “Add A Payment Method”.

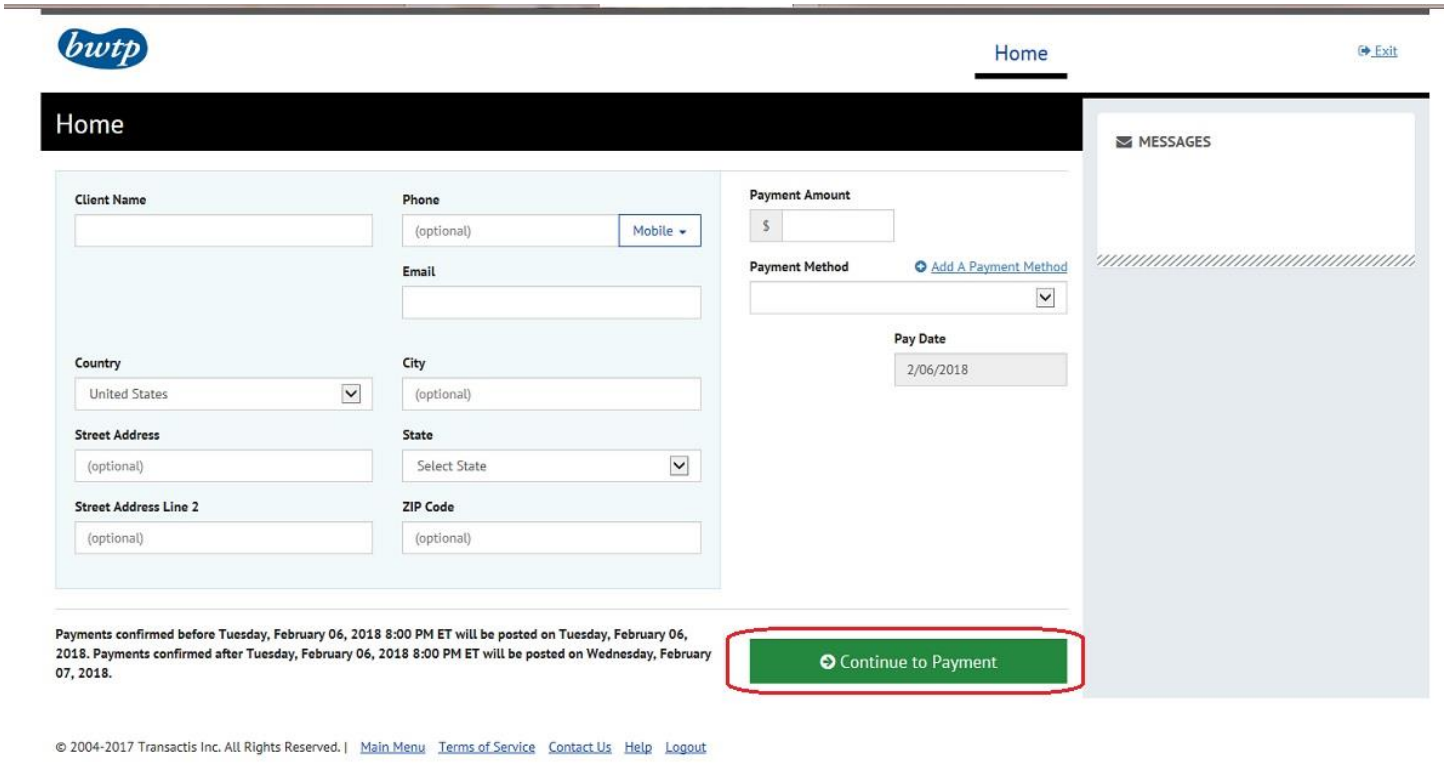


4. Once you click “Add A Payment Method”, you can either pay by ACH or by a credit card. The first image below is the screen to enter in your ACH information, the second is for credit cards. Make sure to check the box for agreeing to terms and add your account.

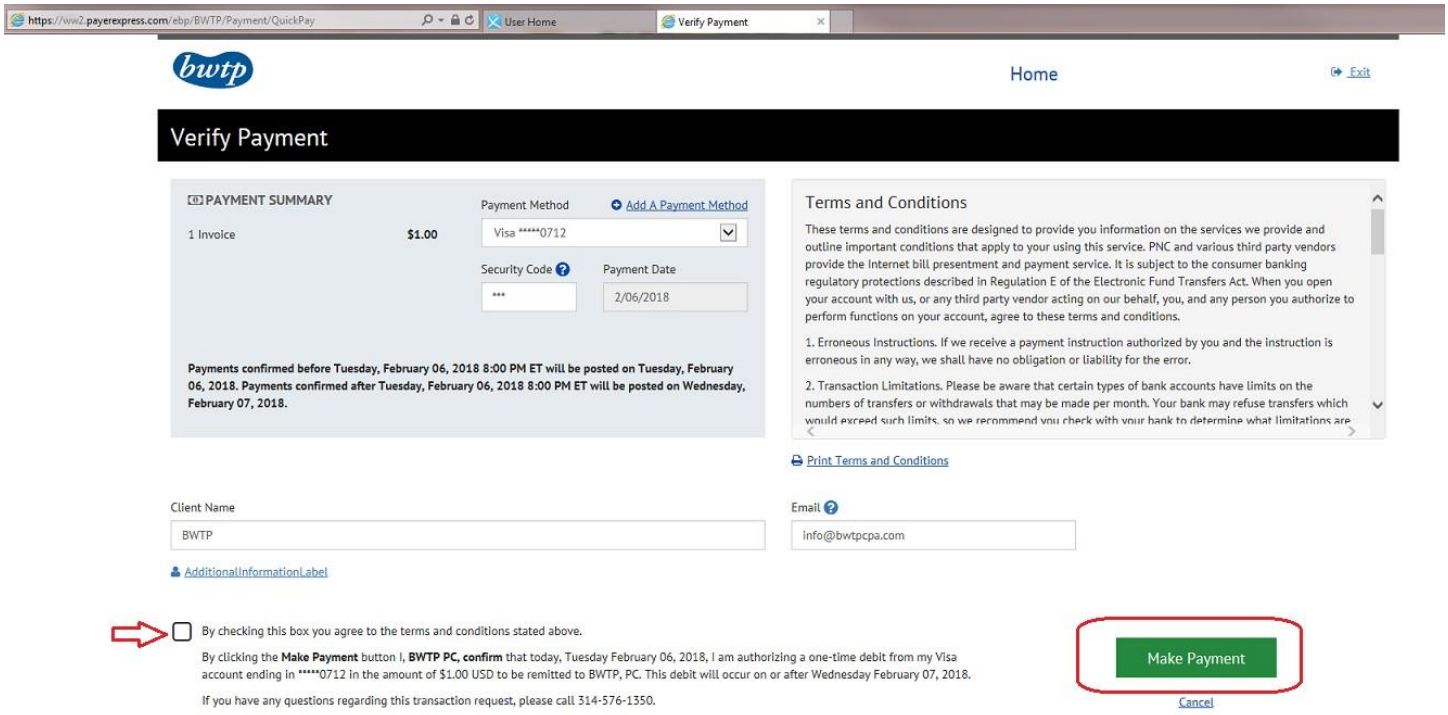




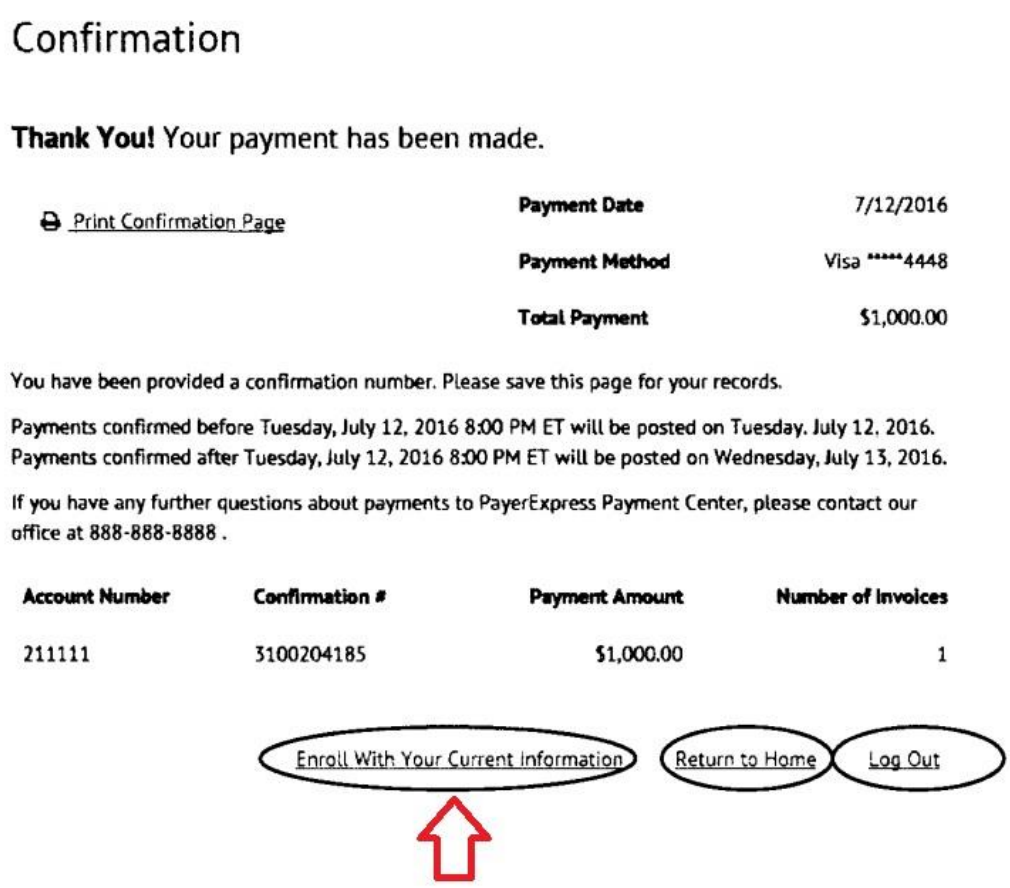
5. After you enter in your payment details, and add your payment account, it will take you back to the first screen, click “Continue to Payment.”



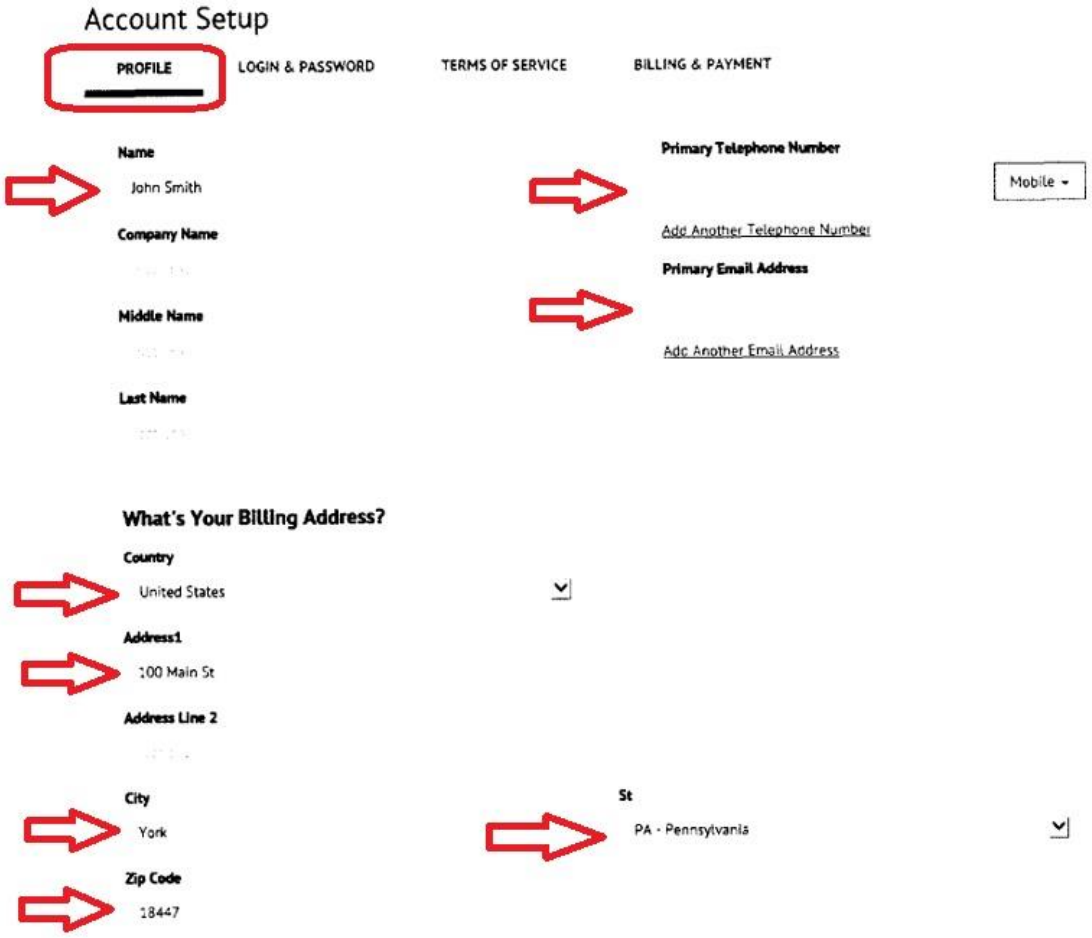
6. On the next screen, you need to verify your payment. Check the box to agree to terms and conditions, then click the green “Make Payment” button.



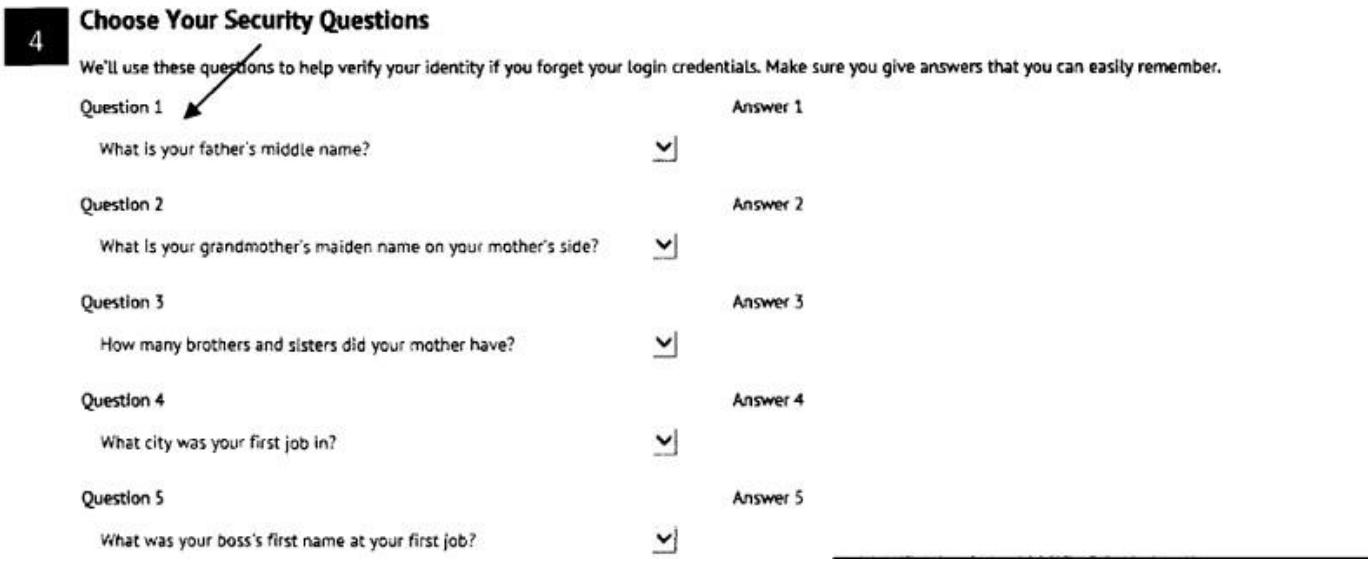
7. On the confirmation screen, click the “Enroll with Your Current Information” option to continue to setup a recurring payment.



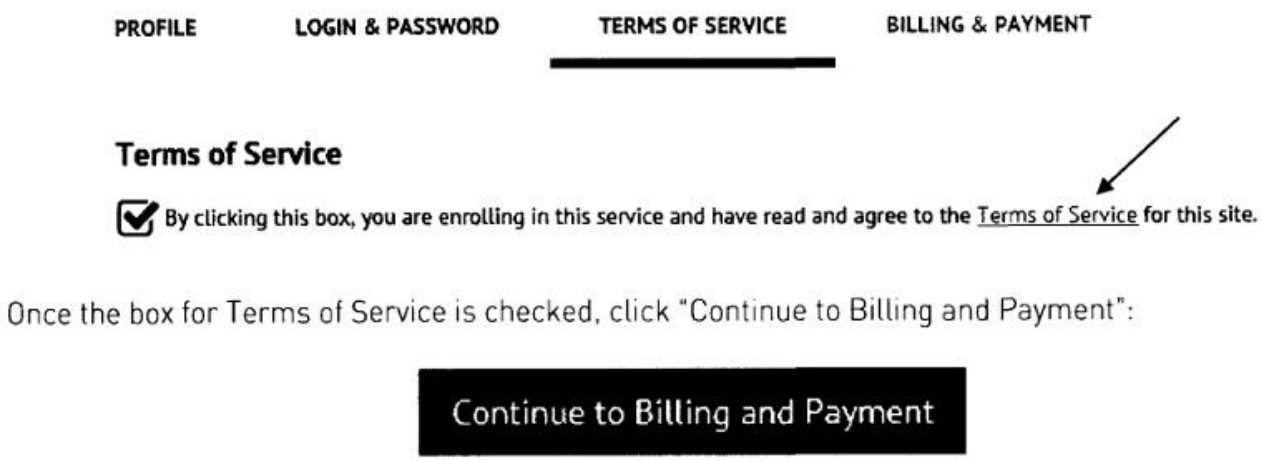
8. There are 4 steps to create your profile on the payment website. The first step is to enter in your information. The required fields are shown below. Click “Continue to Login & Password”.



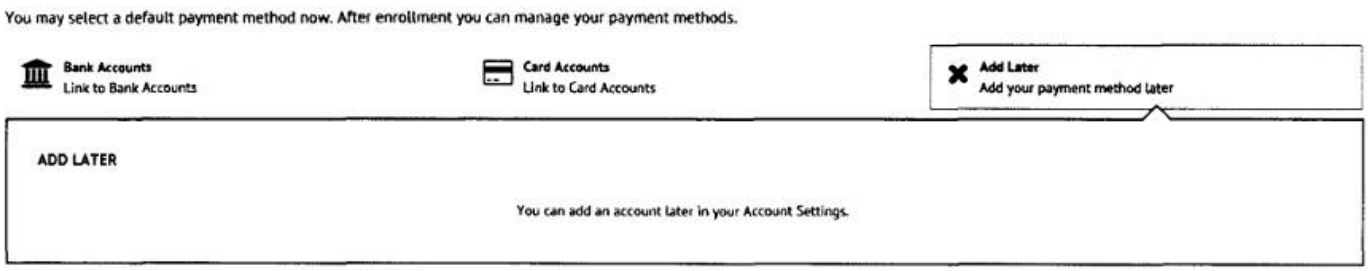
9. The second step is to create a login ID, password, Security image and security questions. **NOTE the Image label for your security image must be at least 6 characters long. You must also select 5 different security questions.



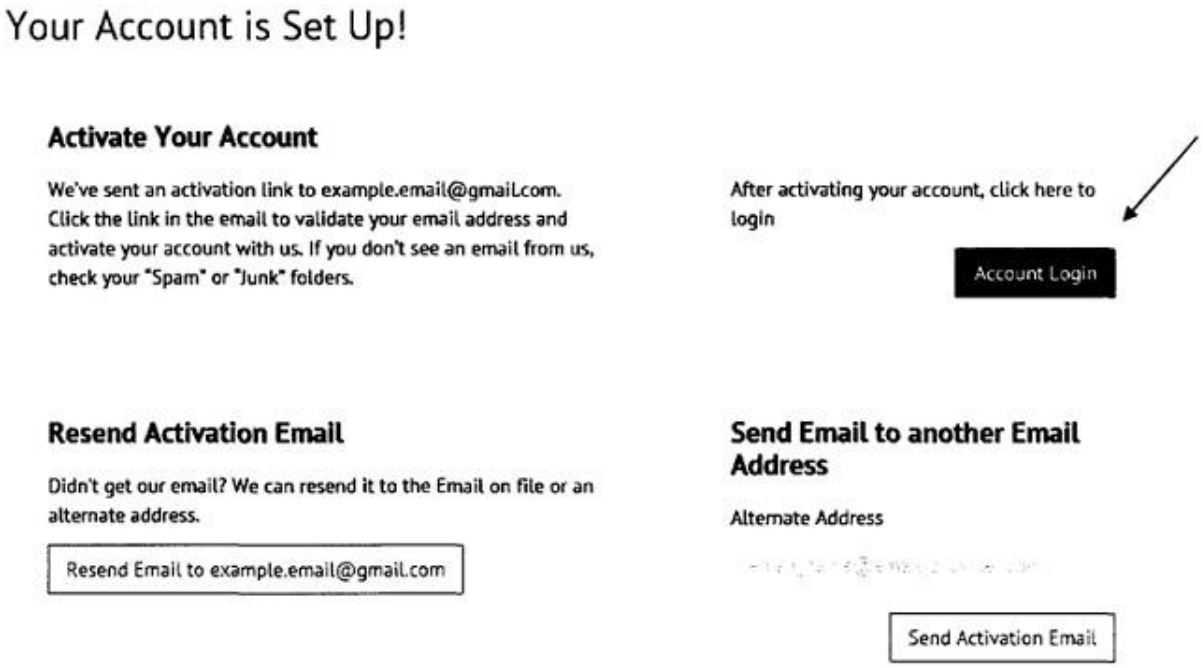
10. After creating security questions, continue to the "Terms of Service" step. Here, all you need to do is check the box and click "Continue".



11. Next in the enrollment process, you can re-enter your ACH or Credit Card information. You can also select to Add a payment method later once the enrollment process is complete.



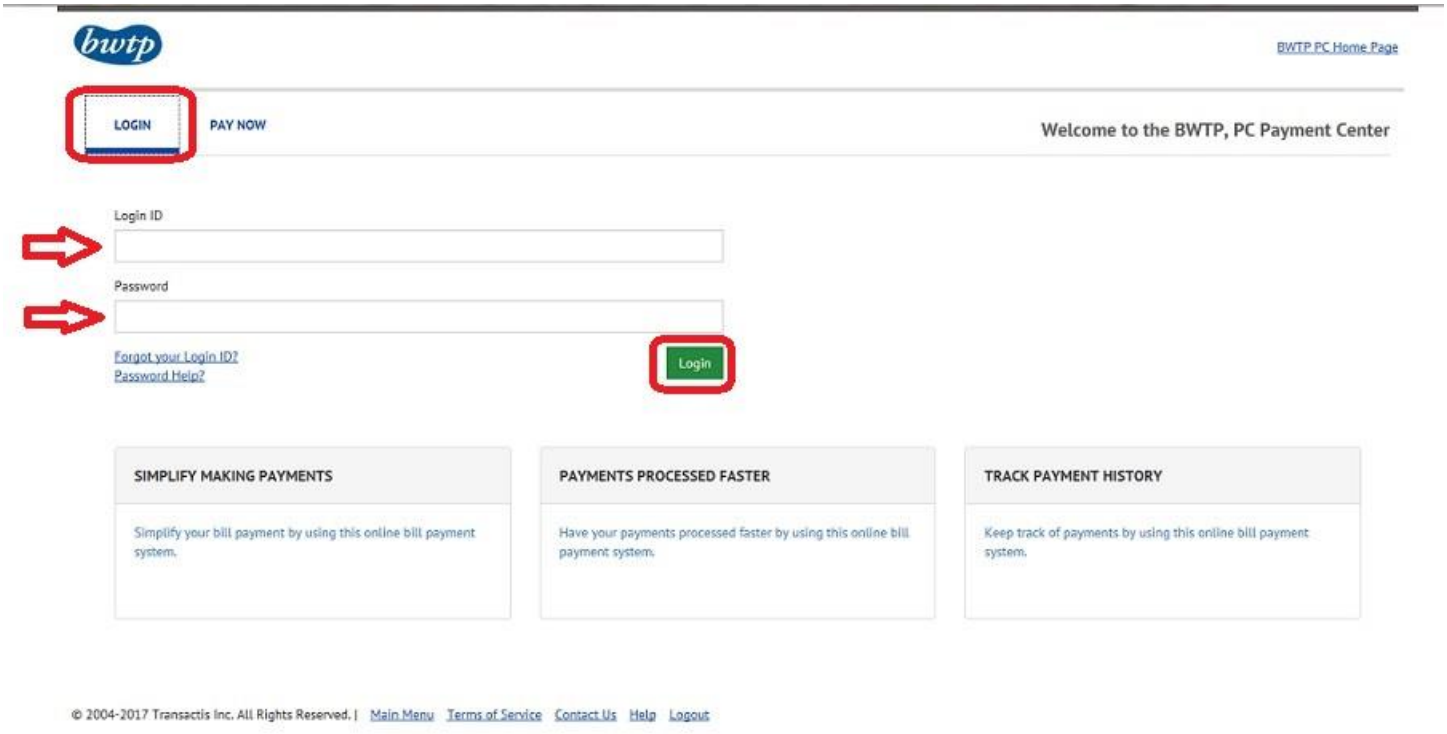
12. Once you add your payment method, an activation email will be sent to your email address you provided in Step 1. Be sure to check your Spam or Junk folders. In the email, will be a link with the word “Activate”, click on that link to activate your account.



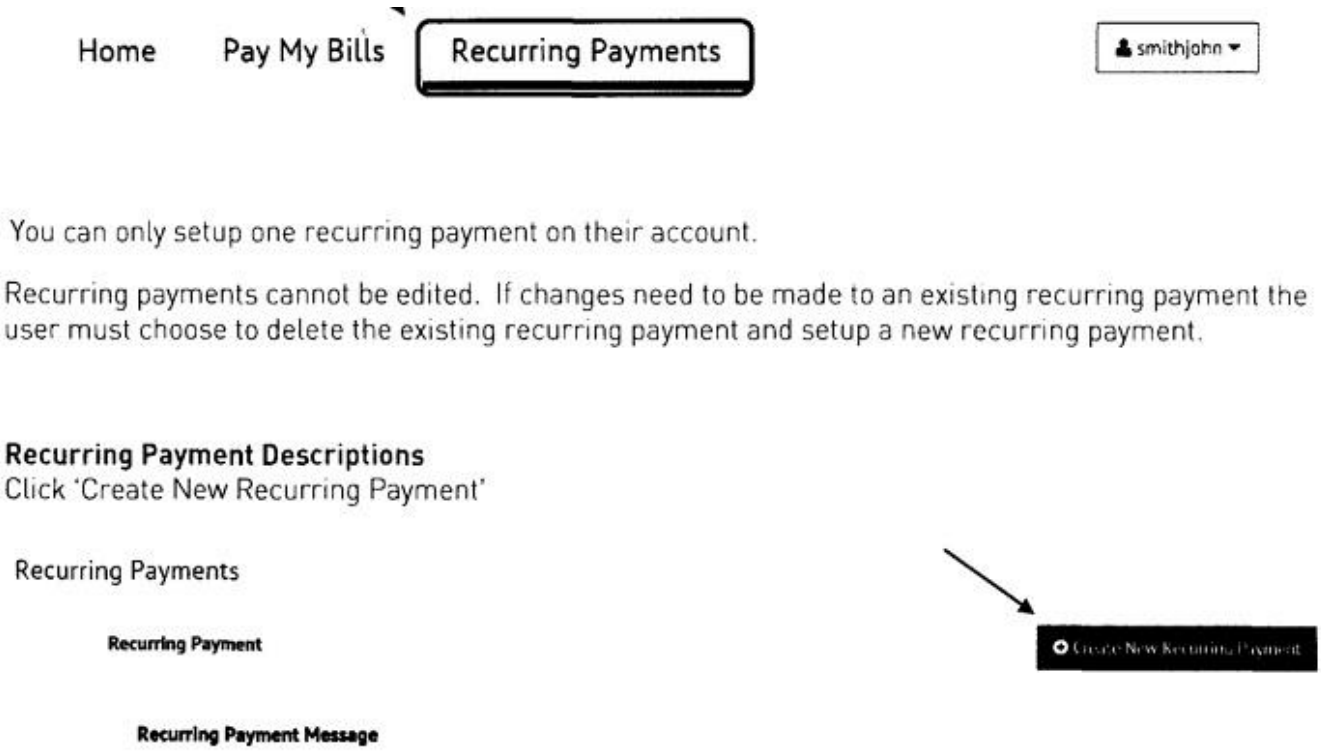
** Note – you will not be able to use your new username until you click the Activation Email sent to the email address(es) provided.

Activation Email – You will need to login to the e-mail provided and find the email generated by the system.

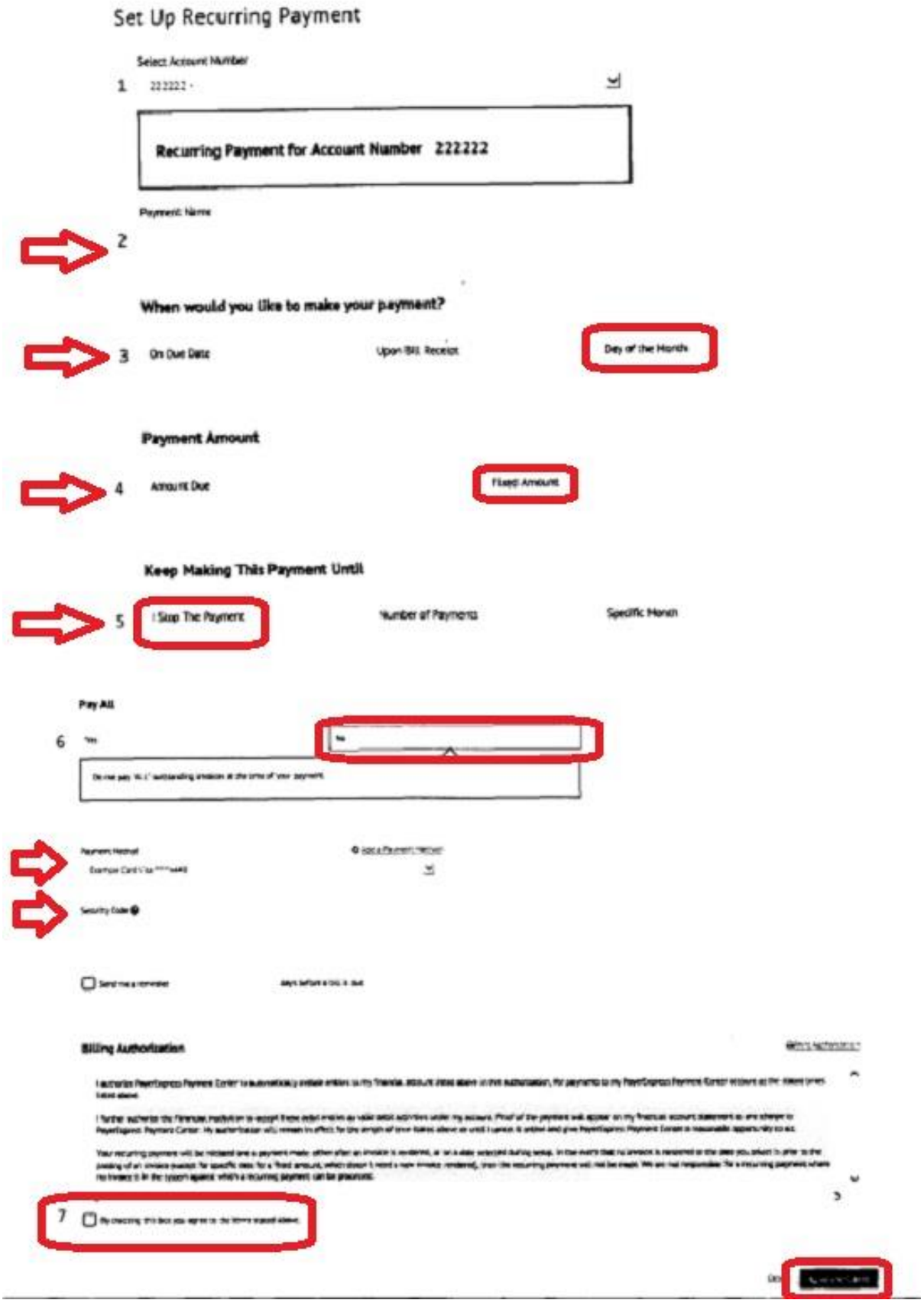
13. Once you have clicked on the activation link, you will need to return to the home page of the Payment website from Step 1 of these instructions. But, make sure you select “Login” instead of “Pay Now”.



14. After you login to your account, select the tab for “Recurring Payments” and click “Create New Recurring Payment”.



15. To create your Recurring Payment, you will need to select 7 options to create your payment:
    a. Account Number
    b. Payment Name
        i. You can choose Monthly Retainer or Monthly Payment
    c. When would you like to make your payment
        i. Please select “Day of the Month” option and choose a day. If you want the payment to happen on the 1st of every month, pick the 1st
    d. Payment Amount
        i. Please select “Fixed Amount” and enter in your monthly retainer or payment plan amount
    e. Keep Making This Payment Until
        i. Please select “I Stop The Payment”. If your retainer amount changes in the future, contact BWTP or delete the current recurring payment and create a new one. If you have problems, please contact BWTP Billing Dept.
    f. Pay All
        i. Please select “NO” for this option.
        ii. Also select the payment method you added during the enrollment process
    g. Billing Authorization
        i. Check the box and click “Agree and Submit” to complete the process.


Set Up Recurring Payment
Select Account Number
1
Recurring Payment for Account Number 222222
Payment Name
2
When would you like to make your payment?
3
On Due Date
Upon Bill Receipt
Day of the Month
Payment Amount
4
Amount Due
Fixed Amount
Keep Making This Payment Until
5
Stop The Payment
Number of Payments
Specific Month
Pay All
6
Yes
No
Payment Method
Security Code
Billing Authorization
7