



Steps to Create an Aiwyn User Account

A payment portal user account is not required in order to make a payment towards an invoice. You can use our website to pay without creating an account.

However with a payment portal user account, you can view previous payments, save and use saved payment methods, setup recurring payments, and link multiple client accounts to your single payment portal user - so that you can view all invoices for all client accounts you make payments for.

Steps to Create an Account:

1. Go to www.elocpa.com
2. Click the Green "Dollar Sign" Icon.
3. When viewing the Sign In page, click "Create an Account".
4. Enter your Email Address, First & Last Name, and create a password.
5. You will receive a verification email.
6. If no email is received, this is because you are a billing contact who has already received an Aiwyn 1-Click Invoice Email, and therefore do not need to verify your email address.
7. Click Log In.
8. You may be prompted to enter your Client Number and any Invoice Number associated with your Client Number. Enter these and click submit. You may need to find and use a past invoice you have received to look up your Client Number and a past Invoice Number.
9. You are now signed in to your Payment Portal User Account and can proceed with making payments, save payment methods, setup recurring payments, or link additional client accounts to your single payment portal user.
10. If you have any questions with this process, please contact our office and we can assist you.

Steps to Setup Auto or Recurring Payments:

1. Once your account is created, go to settings tab in top left corner.
2. You should see 3 options: AutoPay, Recurring Payments, and Saved Payment Methods.
3. You will first need to add a payment method under saved payment methods.
4. After you have saved a payment method, you can choose either AutoPay or recurring payment.
 - a. **AutoPay** - you can choose the day in which your payment will come out, and set it to either pay the full amount of the invoice or set a maximum amount to come out each month. No payment will be made if there is no invoice due on your account.
 - b. **Recurring payment** - you can choose the account in which to apply the payment (if more than one account is linked), set the amount and frequency, and a start and end date for the payments. This will make a payment even if your account is paid in full.
5. Make sure to hit save once your selections have been made.
6. If you have any questions with this process, please contact our office and we can assist you.

Things to note:

- You cannot edit the email address once you have created your user account.
- Aiwyn or your firm cannot see, adjust, or reset the password you created.
- Your user account may automatically be tied to one client account once created, however you can link multiple client accounts to your User so that you can view other client account invoices.