Transact
How To Guides

Updating My Account and Billing Profile
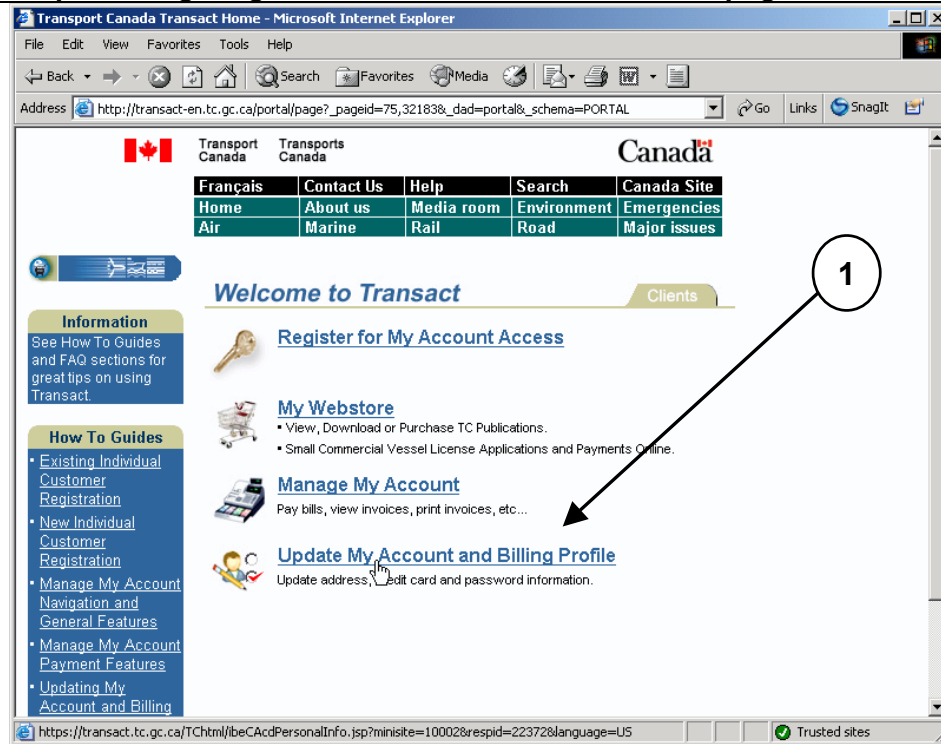
Welcome to Transact.

This guide will demonstrate how to update account and billing profile information through the Transact web portal.

Transact-05

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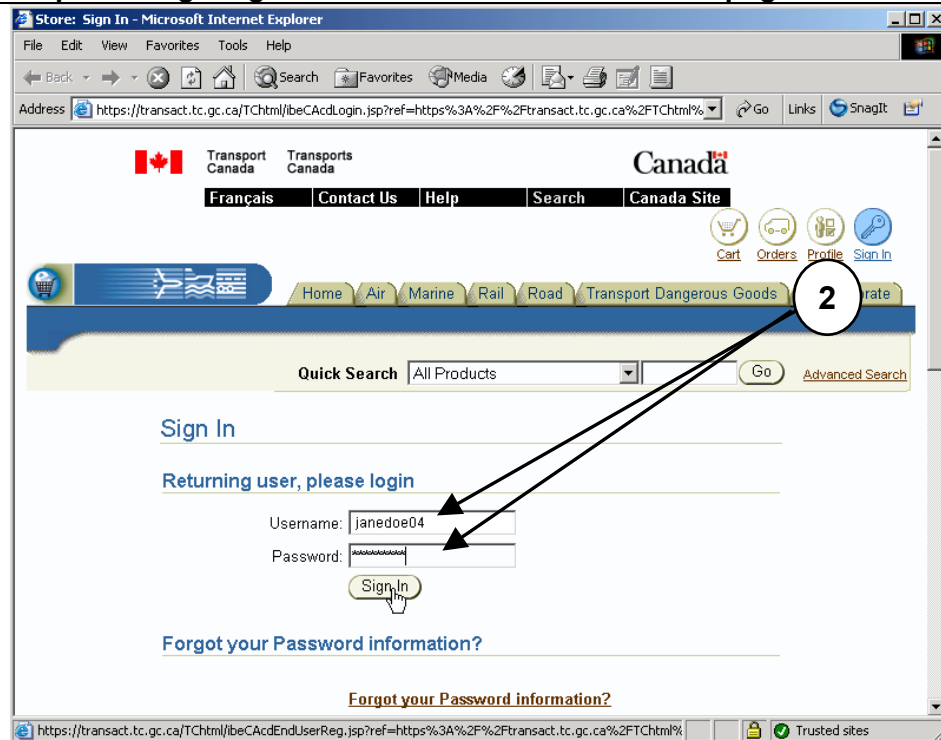| Step 1: Navigating to the Personal Information Webpage	Instructions
	On occasion, registered Transact users will want to review and update some of their personal user and account profile settings. To begin: 1. On the Transact homepage, select the **Update My Account and Billing Profile** link.

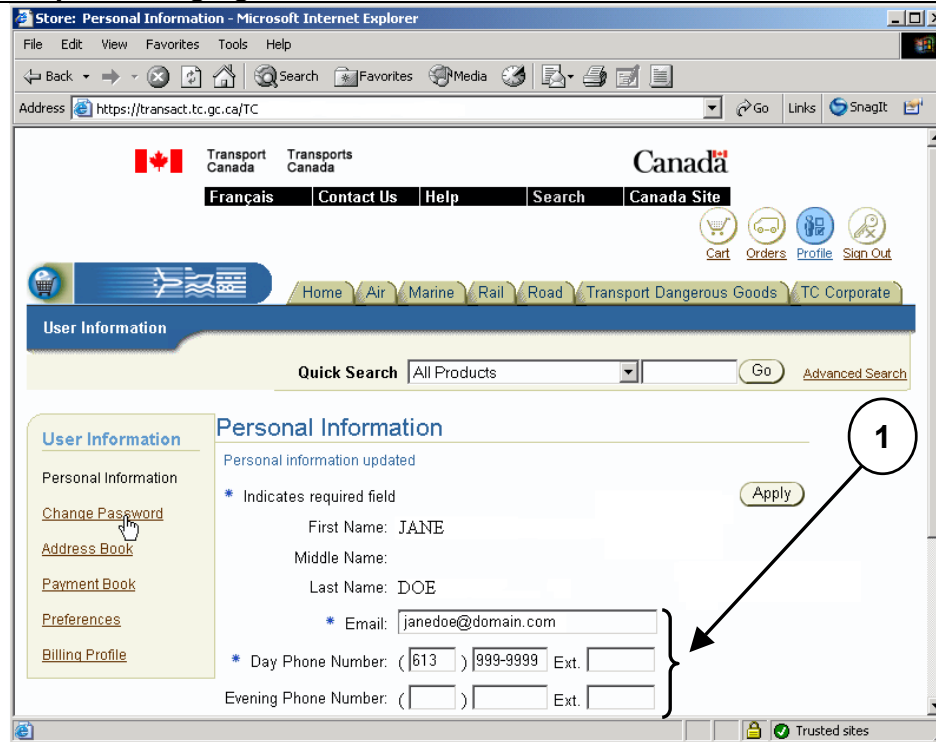| Step 1: Navigating to the Personal Information Webpage *Cont…*	Instructions
	2. Enter your **Username** and **Password**. 3. Click on the **Sign In** button.

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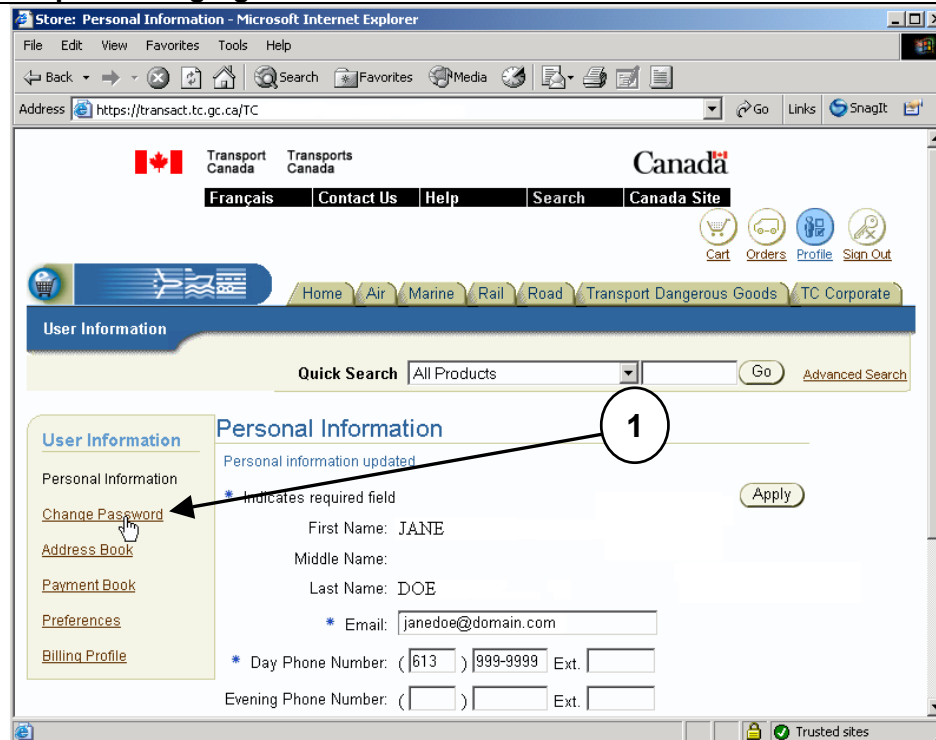
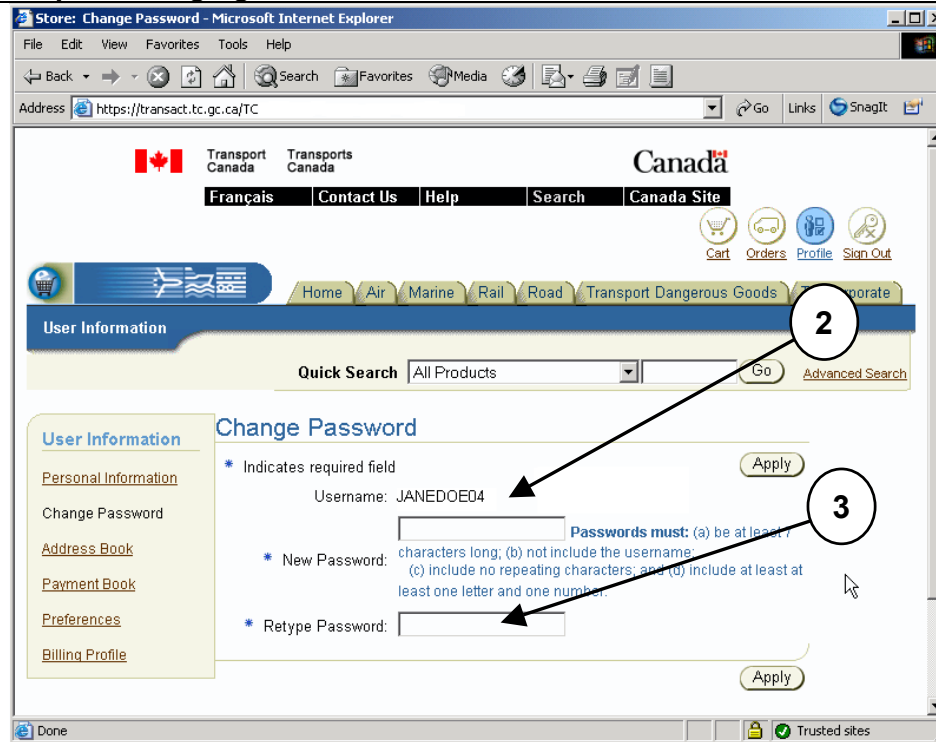| Step 2: Changing Your Personal Information	Instructions
	The Personal Information page is displayed. 1. Use this page to update personal information such as: • **Email address**; • **Day** and **Evening Phone Numbers**; and • **Fax Number**. 2. If you edit any values, click on the **Apply** button to save your new personal information. **Note:** Fields marked with an * are required fields.

Step 3: Changing Your Password	Instructions
	To change your password: 1. Click on the **Change Password** link under the **User Information** section.

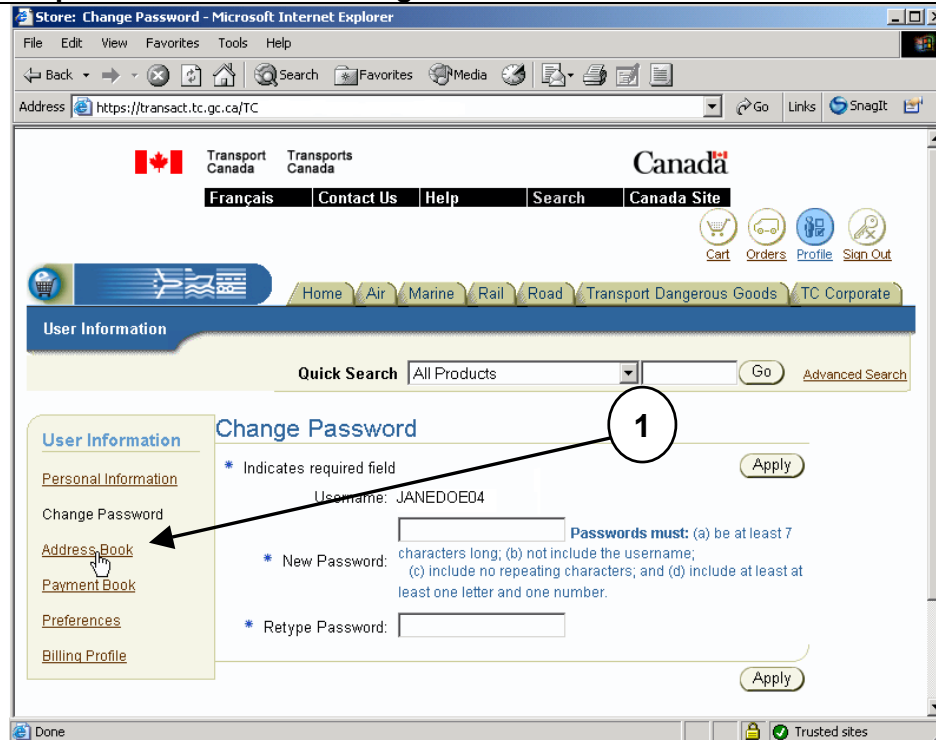| Step 3: Changing Your Password *Cont…*	Instructions
	2. Enter a new password in the **New Password** field.
	3. Retype your new password in the **Retype Password** field.
	4. Click on the **Apply** button.
	Note: Passwords must be at least 7 characters long, should not include any repeating characters, and include at least one letter and one number.

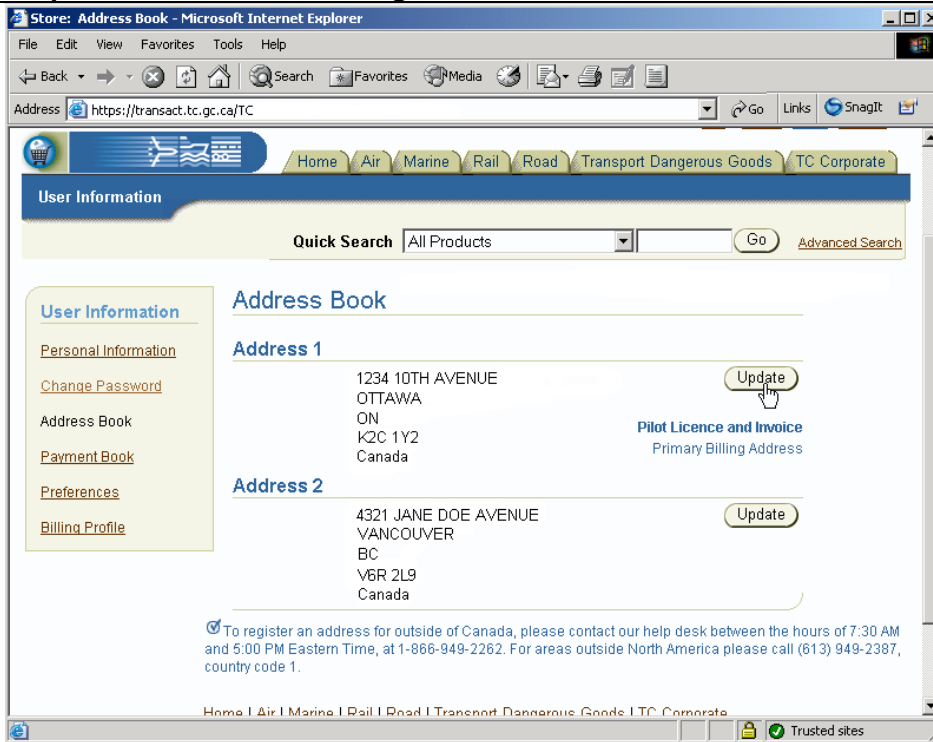| Step 4: Address Book Changes	Instructions
	The addresses displayed in Transact are used to bill your account for goods and services and to ship items to you. To edit the Address Book details for your account:
	1. Click on the **Address Book** link in the **User Information** section.

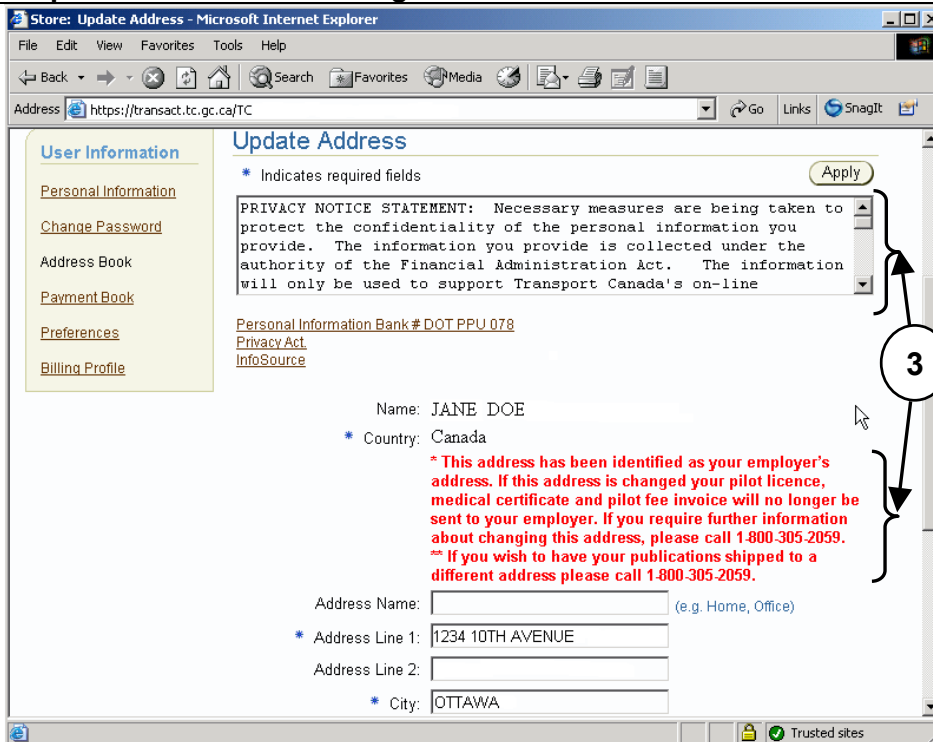# Transact How To Guides
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Step 4: Address Book Changes *Cont…*	Instructions
	2. Click on the **Update** button for the address you want to update.
Step 4: Address Book Changes *Cont…*	Instructions
	3. Read the **Privacy Notice Statement** and text below the Country field before proceeding to update your address.

Step 4: Address Book Changes *Cont…*	Instructions
	4. Update your address information in the fields provided. 5. You have the option to select this address to be used as your Preferred Shipping Address or Preferred Billing Address. 6. Click on the **Apply** button.

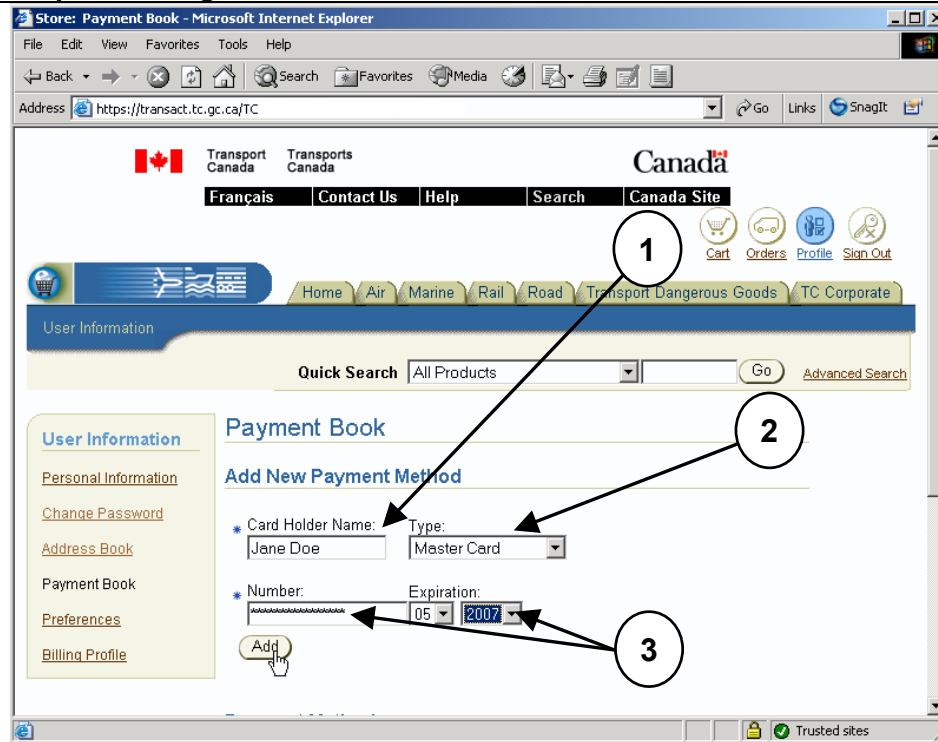| Step 5: Changing Payment Information	Instructions
	The payment details for your account can be changed in two places: the Payment Book page or the Manage My Account Advanced Payment page. Beginning on the Payment Book page you can: • Add a new credit card (see **Step 6**); • Delete a credit card (see **Step 7**); or • Make an existing credit card the default payment method for your account (see **Step 8**). To proceed: 1. Select the **Payment Book** link.

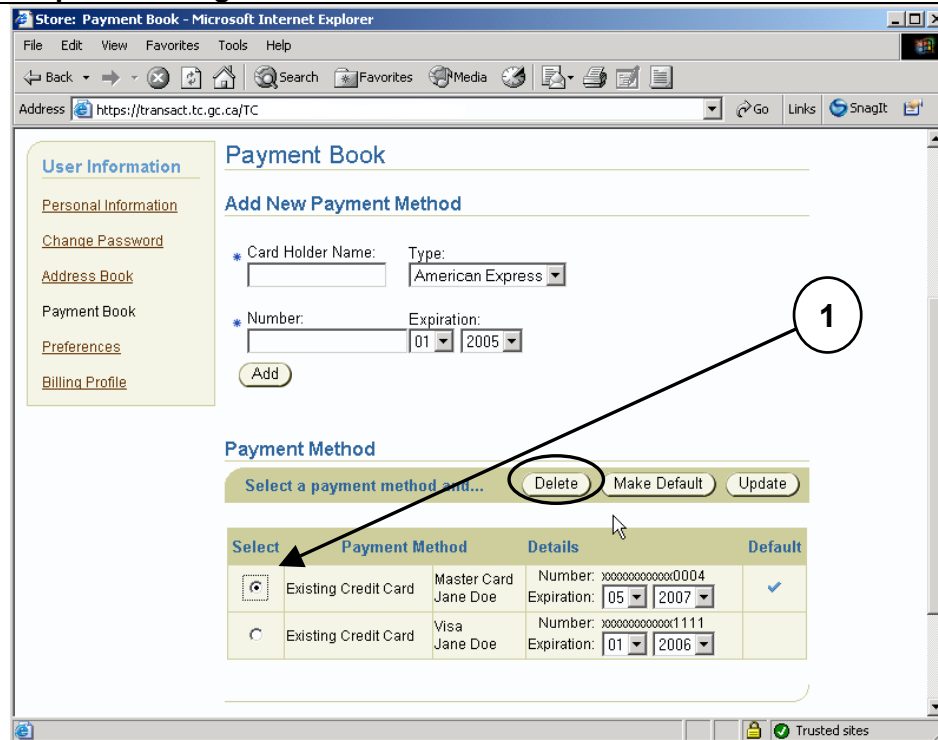| Step 6: Adding a New Credit Card	Instructions
	If you want to add a new credit card for use as a payment method with your account: 1. Enter the name that appears on your credit card in the **Card Holder Name** field. 2. Select the type of credit card from the list of available credit card types in the **Type** field. 3. Enter the **Number** and **Expiration** date of your credit card. 4. Click on the **Add** button. **Note:** Visa, MasterCard and American Express are accepted by Transport Canada.

Step 7: Deleting a Credit Card	Instructions
	If you want to stop using an existing credit card as a payment method with your account, you can delete it from the list of cards available for use by: 1. Clicking on the **Select** circle for the existing credit card. 2. Then, clicking on the **Delete** button.

Step 8: Selecting a Default Payment Method	Instructions
	If your account has more than one credit card setup for use you may want to select one of the cards as the default payment method. To proceed: 1. Click the **Select** circle for the credit card you want to use as your default. 2. Then, click on the **Make Default** button. **Note:** Once a default payment method is selected, every time you begin making a payment with Transact, that credit card will automatically be listed as the payment method. At that time you may either accept the default card or select another credit card for use before completing that specific payment.

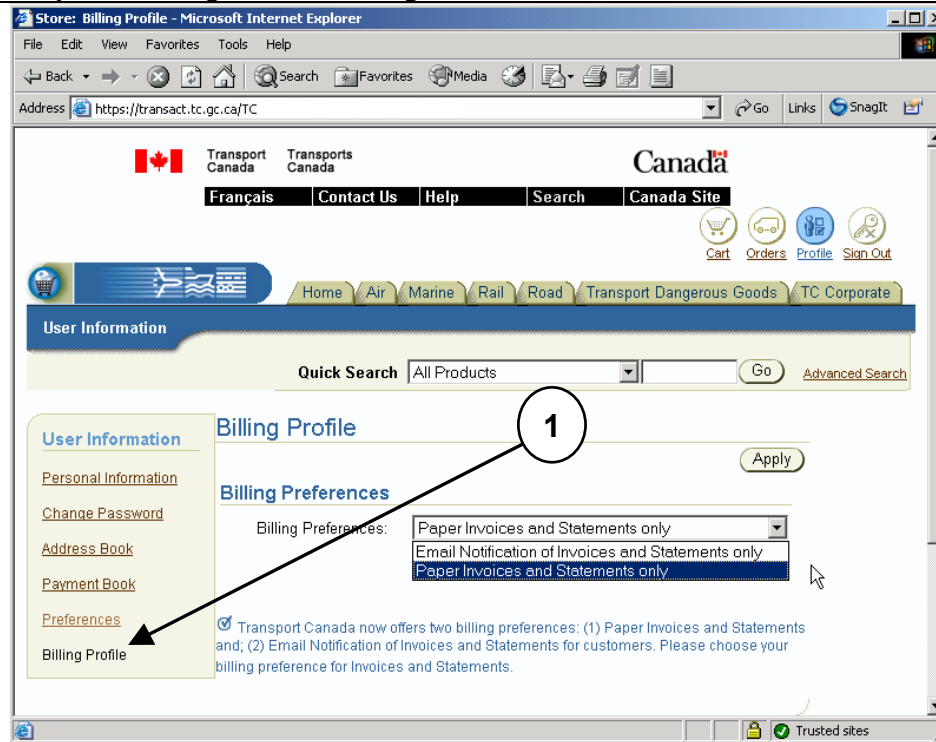| Step 9: Changing a Credit Card's Expiry Date	Instructions
	To update the expiration date stored for a credit card: 1. Click the **Select** circle of the credit card you want to update. 2. Update the **Expiration Date**. 3. Then, click on the **Update** button.

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Step 10: Billing Profile Changes	Instructions
	Transport Canada allows customers to choose their preferred method for receiving notices of new invoices and finance charges: paper copies or email notifications. Please note the following before proceeding: • The default notification method is paper. • Paper and electronic billing notifications cannot be combined. If you wish to update your Billing Profile: 1. Click on the **Billing Profile** link in the **User Information** section. 2. Select your billing preference by choosing an option from the **Billing Preference** drop-down box. 3. Click on the **Apply** button. **Notes:** All users are encouraged to review Transport Canada's Terms of Use before changing the Billing Preferences for their account. There are links to the Terms of Use at the bottom of most Transact pages. For more information on other Transact features and services, please see the other How to Guides, including **Navigation and General Features** and **Payment Options,** found at the Transact home page.