This Quick Reference Guide (QRG) supports students in setting up authorized users to make payments to student accounts.

Students must invite additional payers to access their accounts before friends and family can make payments in Transact.

> Note: Students must take *two* actions for third parties, i.e., friends and family, to get access to view their account balance and make payments.
>
> First, students must grant permission to the third party in Workday to access their records, including viewing financial information.
>
> For step-by-step support in setting up third party access in Workday, see the *Add Friends and Family/Set up Third Party Access* QRG in the *Access for Friends and Family (Third Party)* section of the *Workday Training Materials for Students* website.
>
> Second, students must invite the third party to access their Transact payment accounts so that friends and family can make payments on behalf of their student. This QRG describes how to complete this second step.
>
> Once both steps are completed, third parties are ready to begin making payments to their student's account.

To set up an authorized user to make payments in Transact, complete the following steps.

LOG IN TO YOUR PAYMENT ACCOUNT

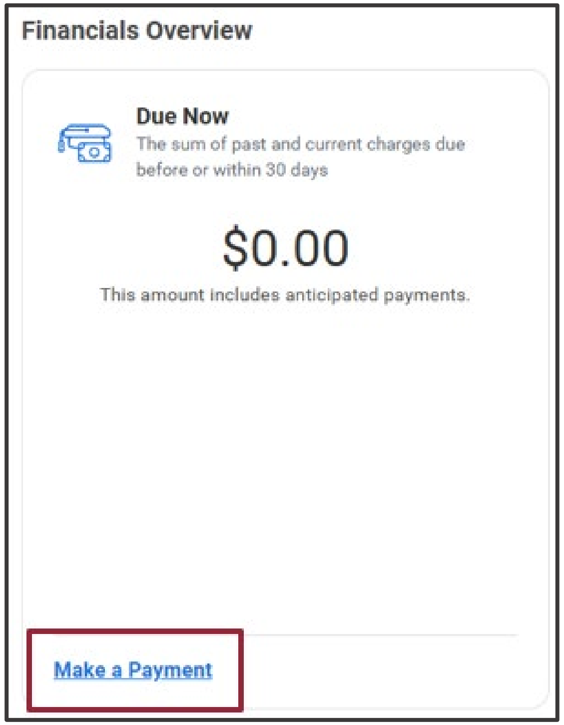
To log in to your payment account, follow the steps below.

From the Workday Homepage:

1. From the Workday Home page, click the **Global Navigation Menu** in the top left corner of your screen.
2. Click **Financials Hub** within the 'Menu.'

The *Financials Overview* screen displays.

3. View the amount 'Due Now' and click **Make a Payment**.



The *Make a Payment* pop-up window displays.

By continuing, you'll be redirected outside of the Workday application.

Notice that you will be redirected outside of the Workday application to complete the payment. Your institution uses a system called Transact to process payments.

4. Click **OK**.

The *eCommerce Payment System* login screen displays.

5. Type in your institutional **User Name** and **Password** credentials.

User name

Password

6. Click the **Sign In** button. You may see a 'Sign in with <your institution name>' button that you can also select.

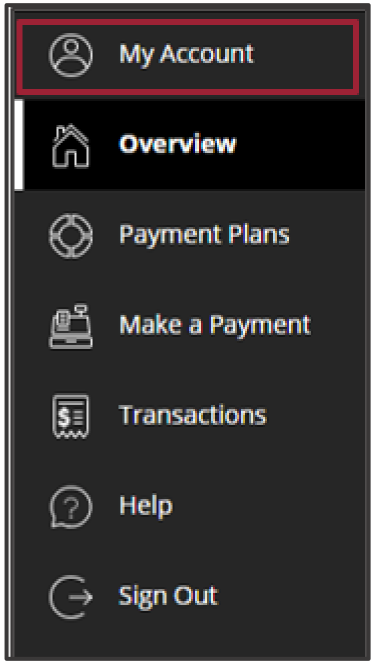
Sign in

The *Overview* page displays.

ADD AN AUTHORIZED PAYER

To add an authorized payer, follow the steps below.

1. Click **My Account** in the left menu.



The *My Account* screen displays.

2. Locate the *Payers* section and click **Send a payer invitation**.

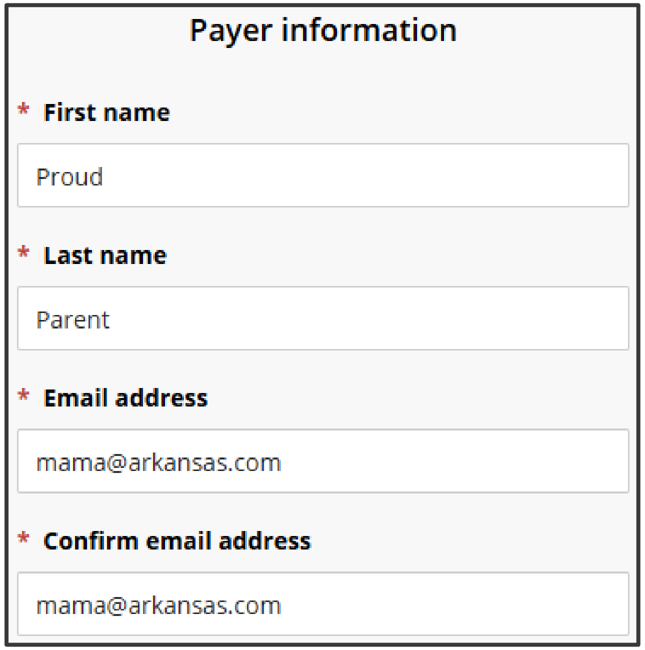
Payers

Do you know someone that would like to help you pay? Invite them to have access to your account!

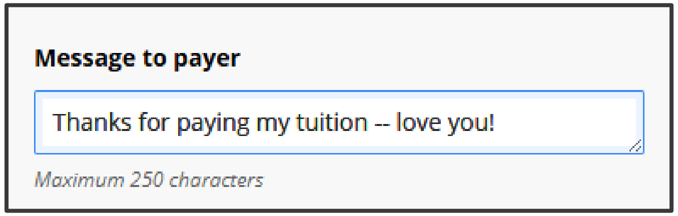
Send a payer invitation

The *Payer Invitation* pop-up screen displays.

3. Type the payer's name and email address within the fields provided.

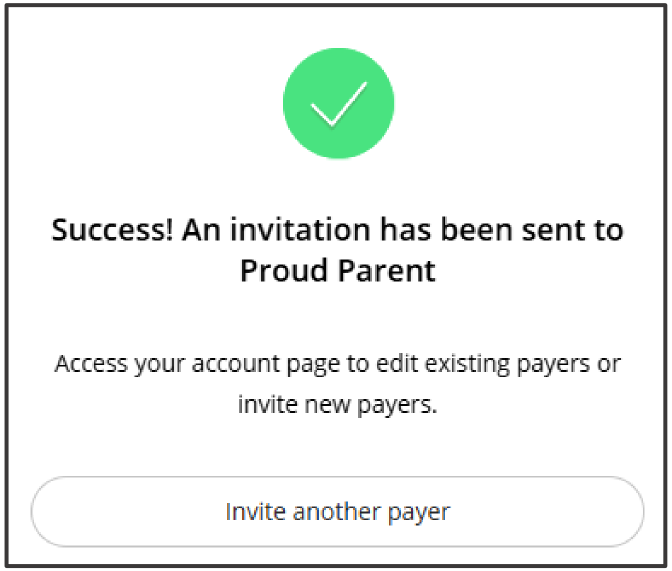


4. (Optional) Type a brief message for the payer to receive along with the invitation.



5. Click **Send invitation**.

The *Success*! screen displays.



The payer you added will receive an email with their login information. They will need to create a new password the first time they log in.

When they log in, their account view functionality will look identical to yours.

6. (Optional) Click **Invite another payer** to add an additional payer.
7. Click **Close**.