How to use the PayPal Integration.

1. First of all you need to have a PayPal account. It can be either a Business or Personal one – both are free and easy to set up. To setup a PayPal account, go to https://www.paypal.com/ie/mrb/pal=FD2H2SN4PDDMN and click on the "Sign Up" button.

2. Once the account is setup, login to your SortMyBooks Online account and go to the "Settings" tab. Then click on the "API" tab below that. Make sure the "Enable API" box is ticked. Click on the "Connect with PayPal" button.

How to use the PayPal Integration – Pt 2.

3. A pop-up box will appear asking you to enter the PayPal Email. This is the email address used to setup the PayPal account. In some cases you may need the Primary Email Address. The Primary Email address will only apply to those accounts where more than one email address has been registered to that account.

    If you have a PayPal account already, check the Primary email address of the account. To do this login to your PayPal account and click on the "Profile" tab. The Primary Email Address will be listed there.

4. Once you have entered the email address click "OK" to save it. The system will display a message notifying you that it has been done.

    you have successfully connected to your PayPal account

    N.B: Make sure it is spelt correctly otherwise it will cause problems when the Customer tries to pay.

5. When you go to email out the invoice to your customer, there is a tick box that says "PayPal link".

    Email   ✕

    To: test@testcustomer.com
    Cc:
    Subject: Test File

    Hi Bob,

    Please find attached the Invoice.

    Thanks,
    Fred

    ☑ Paypal link ☐ Send copy to my email address

    Ok   Cancel

    Tick this and the system will add PayPal's recognisable ![Pay Now] button to the email, allowing the Customer to pay you online.

How to use the PayPal Integration – Pt 3.

6. PayPal has fees, like any merchant account, but there is no monthly overhead, the fee is deducted when you get paid. The schedule of fees are here: https://www.paypal.com/ie/cgi-bin/webscr?cmd=_display-fees-outside

7. Once the customer has paid online the system will create a PayPal account in your SMBO account, add the payment to the account and allocate it to the correct invoice too, as well as updating your VAT, P+L & Debtors!