



# *Getting Started with PayPal Manager*

For Professional Use Only  
Currently only available in English.

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A usage Professional Uniquement  
Disponible en Anglais uniquement pour l'instant.

## *Getting Started with PayPal Manager*

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# 1

## Getting Started with PayPal Manager

Welcome to PayPal services. Now that you have enrolled for your payment service and selected the type of account you want, this guide can help you get started. You will go to PayPal Manager, PayPal's secure Web-based transaction management tool, where you can regularly review your account activity and conduct transactions. This guide will walk you through a few transactions, including submitting a sale transaction, crediting that transaction back to the customer, and finally running a report of your daily activity.

You can keep this manual open while you work, and follow the steps on PayPal Manager. When you finish with these procedures, you should be ready with the basics you need to manage your account. If you want to learn more about PayPal Manager and PayPal services, you can click **Help** on any page of PayPal Manager, or you can click the **Documentation** link on the top right side of any PayPal Manager page to download additional product manuals.

### Accessing PayPal Manager

Log in to PayPal Manager at <https://manager.paypal.com>. This brings you to the Home page of PayPal Manager (as shown in Figure 1.1) from which you can manage your account and review your transactions.

**FIGURE 1.1** PayPal Manager Home Page

Service	Status	Mode
<a href="#">Payflow Link</a>	Live	Live
<a href="#">Basic Fraud Protection</a>	Live	Not-Deployed
<a href="#">Account Monitoring Service</a>	Live	--
<a href="#">Buyer Authentication</a>	Live	--
<a href="#">Recurring Billing</a>	Live	--
<a href="#">Customer Support Service</a>	Live	--
ACH Services	--	--

PayPal Manager's Home page gives you alerts from PayPal, a snapshot of your daily activities, and other important information about your account and about PayPal services. Tabs at the top of the PayPal Manager provide access to all payment services task pages.

## Working in Test Status

The first time you log in to PayPal Manager, you are in Test status (the Home page of PayPal Manager indicates this). This means that you can run mock or test transactions to familiarize yourself with PayPal Manager and make sure your account is set up correctly. These test transactions are not sent to financial institutions for processing, and no money trades hands.

## Working in Live Status

When you are ready to run actual transactions, you will change to Active, or Live status. To change to Active status or see which status you are in, go to the Home page of PayPal Manager and look at the **Your Account Status** section on the right side. Even after your account is active, you can still perform test transactions if necessary.

At any time, you can activate your account (change to Live status) by clicking the **Activate Your Account** button on the Home page.

Make sure you have an internet merchant account before you activate your PayPal services account. Otherwise, your live transactions will fail.

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## Using PayPal Manager

Normally, when your customers make purchases at your web store, the transactions are handled in an automated fashion from the customer to PayPal to the processor to the bank. When the bank authorizes or declines a transaction, the receipt information is sent to the customer and the activity information is sent to you. You will review your transaction activity regularly by going to the **Reports** section of PayPal Manager and generating a report for the day, or a longer period, to see how your business is doing.

However, as a new customer, you don't have any transactions yet, so we will perform some manual transactions to get started. The following examples are all manual and in test status to allow you to get a feel for the PayPal Manager without using real data. You will complete live transactions in exactly the same manner.

First you will submit a sale transaction, then credit that transaction back to the customer, and finally run a report of your daily activity.

## Submitting a Sale Transaction

A manual sales transaction is used when you take orders by telephone or mail, for example.

1. Click the **Virtual Terminal** tab at the top of PayPal Manager, then click the **Single Transaction** tab on the left side of the page. On the Perform Transaction - - Step 1 page, select or fill in the fields:
  - Transaction Method: **Credit Card**
  - Transaction Type: **Sale**
  - Credit Card Number: **5105105105105100**. This is one of the test credit card numbers.
  - Transaction Mode. **Test**
2. Click **Submit** to go to the second part of Perform Transaction - - Step 2 page. On this page, you specify the transaction, billing, and shipping information:
  - Expiration Date: **01/2008**
  - Card Security Code: **555**
  - Amount: **20.00**
  - Comment 1: **test**
  - Billing Information: Any sample information
  - Shipping Information: Any sample information
  - Purchase Card Level -2 Information: Any sample information
3. Click **Submit**. On the next page, you'll see the Perform Transaction -- Result page with information about your test sale transaction. Make a note of the **Transaction ID**. You will use that ID later.

## Crediting a Transaction

In the following procedure, you will credit back the \$20.00 sale transaction you made.

1. To credit a transaction, you need the transaction ID of that transaction. For this example, you made a note of the **Transaction ID** of the previous sale transaction. At other times, you may want to run a report to find out what the transaction ID is.
2. Click the **Virtual Terminal** tab at the top of PayPal Manager, then click the **Single Transaction** tab on the left side of the page. The Perform Transaction - - Step 1 page appears. Again, you will specify information such as the type of transaction you would like to perform. Because it is a credit, you will also need the original transaction ID and the number of the credit card you are to credit back.
  - Transaction Method: **Credit Card**
  - Transaction Type: **Credit**
  - Credit Card Number: **5105105105105100**. This is the test credit card number you used to complete the previous sale transaction.
  - Transaction Mode. **Test**

- Original Transaction ID: Enter the Transaction ID you noted from the previous transaction.
- 3. Click **Submit** to go to the second part of Perform Transaction -- Step 2 page. On this page, enter the dollar amount you are crediting back (**20.00**). You can also enter a sample Comment and Purchase Card Level -2 information.
- 4. Click **Submit** to credit the transaction. The Perform Transaction -- Result page appears to verify your transaction.

## Generating a Daily Activity Report

Now that you have a couple of transactions, you can generate a report to review them.

1. Click the **Reports** tab at the top of PayPal Manager, then click the **Standard** tab and then **Daily Activity** tab on the left side of the page.
2. The default settings will show you a summary of today's activities. For this example, accept the default settings. Later, you can try specifying different days and different ways to sort the transactions.
3. Click **Run Report**. The Daily Activity Transaction Report page appears, and displays all the transactions conducted of the selected day; in this case, the sale and credit transactions from the previous examples. You can click on the Transaction ID number to bring up the details of an individual transaction.

Later, when you are regularly doing business, you can use the Transaction Summary Report, or create your own report type. Refer to PayPal Manager online help for details.

Congratulations! You are now ready to activate your account, and perform live transactions. Remember, online help is always available from the PayPal Manager if you need and want more information.