



Merchant Setup and Administration Guide

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PayPal Merchant Setup and Administration Guide

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Preface

About This Guide

The *Merchant Setup and Administration Guide* describes how to perform set-up, administrative, and other back-office tasks that let you manage your PayPal account.

The following table summarizes the contents of this guide.

TABLE P.1 Summary of the Contents of This Guide

Feature	Description	See
Credit Card Statement Name	Create a name that appears on the payer's credit card statements.	“Adding Your Credit Card Statement Name” on page 9
Block Payments	Choose options to block payments from certain payers, currencies, or funding sources.	“Blocking Certain Kinds of Payments” on page 10
Manage Users	Create separate user names for your account with different permission levels.	“Adding Users to Your PayPal Account” on page 17
Manage Multiple Currencies	Choose the currencies that your account will hold a balance and accept or deny cross-currency payments.	“Handling Multiple Currencies” on page 23
Custom Payment Pages	Brand the PayPal checkout pages with your own logo and colors.	“Co-Branding the PayPal Checkout Pages” on page 29
Payer Contact Telephone	Prompt people for their contact telephone numbers when they pay you on PayPal.	“Getting Contact Telephone Numbers” on page 35
Default Language and Character Encoding	Set the default language and character encoding to use for data exchange between your website and PayPal.	“Language Encoding Your Data” on page 41
Account History	Search and review account activity, activate monthly account statements, and download account history.	Chapter 3, “Viewing Your Account History”

Intended Audience

This guide is for merchants and secondary users who log in to PayPal accounts for a variety of set-up and on-going administrative tasks.

Revision History

The following table lists the revisions made to the *Merchant Setup and Administration Guide*.

TABLE P.2 Revision History for This Guide

Date Published	Description
January 2010	Added topics for “ Providing Your Customer Service Number ” on page 37, “ Handling Gift Purchases ” on page 37, “ Prompting Buyers for Marketing Messages ” on page 40, and “ Asking Buyers a Survey Question ” on page 40, which let you control the way your PayPal checkout pages operate.
October 2009	Updated “ Handling Multiple Currencies ” on page 23, “ Co-Branding the PayPal Checkout Pages ” on page 29, and Chapter 3, “ Viewing Your Account History ”. Added a field to “ Fields and Values in Downloadable History Logs ” on page 67.
September 2009	Updated “ Co-Branding the PayPal Checkout Pages ” on page 29 and Chapter 3, “ Viewing Your Account History ”.
June 2009	New guide.

Where to Go for More Information

- www.paypal.com/developer > [How To](#) > [Administration/Back Office](#) > [Recurring Payments Administration](#)
- [Fraud Management Filters](#)
- [Virtual Terminal User's Guide](#)

Documentation Feedback

Help us improve this guide by sending feedback to:

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1

Setting Up and Administering Your Account

Before you take your first payment on your PayPal account, consider the following:

- How do you want your name to appear on credit card statements?
- Will you accept payments from other countries?
- Do you want to grant account access to other users in your organization?
- What currencies will you accept?

Use your PayPal account profile to set and edit these options.

Read the following topics to learn about the profile settings:

- “Adding Your Credit Card Statement Name” on page 9
- “Blocking Certain Kinds of Payments” on page 10
- “Adding Users to Your PayPal Account” on page 17
- “Handling Multiple Currencies” on page 23

Adding Your Credit Card Statement Name

When PayPal members pay with credit cards on file with their PayPal accounts, the transaction descriptions appear on their credit card statements in the following format:

PAYPAL**MERCHANT*

By default, *MERCHANT* is:

- For premiere accounts, the mailbox name of the email address that you specified when you signed up your account.
- For business accounts, the business name that you specified when you signed up for your account.

The value you specified is converted to all upper-case letters, spaces are removed, and the result is truncated to eleven characters. The result is stored in your account profile as your Credit Card Statement Name.

The default value for your Credit Card Statement Name may be difficult for payers to understand. To reduce chargebacks and payer confusion, replace the default Credit Card Statement Name with one that accurately reflects your business or legal name. Use the **Payment Receiving Preferences** page to make this change.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down the page to the **Credit Card Statement Name** section, as shown below.

.....

The Credit Card Statement Name is the name that will appear on your customers' credit card statements.

The name can be 11 alpha-numeric characters in length, including spaces.

For some payments, the name can be extended to 19 alpha-numeric characters in length, including spaces. [Learn More](#)

Credit Card Statement Name: (11 Character Maximum)

Extended Credit Card Statement Name: (19 Character Maximum)

5. Change your credit card statement settings:

Setting	Action
Credit Card Statement Name	Enter up to 11 characters and spaces. Do not include special characters, such as "&," "#", or "_". The value is converted to all capital letters and might be truncated by some credit card processors.
Extended Credit Card Statement Name	Enter up to 19 characters and spaces. Do not include special characters, such as "&," "#", or "_". The value is converted to all capital letters and might be truncated by some credit card processors.

6. Scroll to the bottom of the page and click the **Save** button.

Blocking Certain Kinds of Payments

Use the **Payment Receiving Preferences** page to block payments from certain payers, currencies, or funding sources. For example, if your account maintains currency balances for U.S. dollars and Euros, you can block payments that are in other currencies.

The Payment Receiving Preferences page contains several options that you can set to block payments in certain situations.

Payment Receiving Preferences page

Payment Receiving Preferences [Back to Profile Summary](#)

Block Payments for the items not sold on eBay from U.S. users who **do not** provide a confirmed address:

☐ Yes
☒ No
☐ Ask Me

Block payments sent to me in a currency I do not hold:

☐ Yes
☐ No, accept them and convert them to U.S. Dollars
☒ Ask Me

Block accidental payments:
 You may prevent accidental payments by blocking duplicate invoice IDs

☒ Yes, block multiple payments per invoice ID
☐ No, allow multiple payments per invoice ID

Block payments from users who:

☐ Have non-U.S. PayPal accounts
☐ Initiate payments from the Pay Anyone subtab of the Send Money tab
 (If checked, you may enter an Alternate Payment URL for your buyers.)

Alternate Payment URL: [?](#)
 (optional)

Block the following payments:

☐ Pay with eCheck or German bank transfer for all website payments except eBay. **NOTE:** You may not block eCheck payments on eBay.

Display "Add Instructions to Seller" text input field:

☒ Yes
☐ No

The Credit Card Statement Name is the name that will appear on your customers' credit card statements.

The name can be 11 alpha-numeric characters in length, including spaces.

For some payments, the name can be extended to 19 alpha-numeric characters in length, including spaces. [Learn More](#)

Credit Card Statement Name: (11 Character Maximum)

Extended Credit Card Statement Name: (19 Character Maximum)

Read the following topics to learn more about blocking payments:

- [Blocking Payments From U.S. Payers Without a Confirmed Address](#)
- [Blocking Payments in Currencies That You Do Not Hold](#)
- [Blocking Accidental Payments](#)
- [Blocking Payments from Payers With Non-U.S. PayPal Accounts](#)
- [Blocking Payments Initiated Through the Pay Anyone Subtab](#)
- [Blocking Payments Funded With eChecks](#)

Blocking Payments From U.S. Payers Without a Confirmed Address

You can better manage your risk by blocking payments where the payer chooses not to share his Confirmed Address with you. PayPal provides Confirmed Addresses to help you make informed decisions when shipping goods. To be eligible for PayPal's Seller Protection Policy (SPP), and to help reduce your risk of dealing with fraudulent buyers, ship to a buyer's Confirmed Address.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Select an option from the **Block payments for items not sold on eBay from U.S. users who do not provide a confirmed address** section, as shown below:



Block Payments for the items not sold on eBay from U.S. users who do not provide a confirmed address:

☐ Yes

☒ No

☐ Ask Me

5. Select one of the following options:

- **Yes** – Block all payments from U.S. payers without a Confirmed Address. This option requires that all U.S. payers provide a Confirmed Address in order to pay you.
- **No** – Accept all payments. To maximize your sales, select this option.
- **Ask Me** – Choose whether to accept or deny payment without a Confirmed Address on a transaction-by-transaction basis. This option lets you decide whether to take on the risk of not having the payer's Confirmed Address for each transaction. If you accept the payment, it becomes a completed transaction. If you deny a particular payment, PayPal notifies the payment sender that their payment was denied and credits the sender with the payment amount. PayPal does not charge fees for denied payments.

6. Scroll to the bottom of the page and click **Save**.

Blocking Payments in Currencies That You Do Not Hold

When you receive a payment in a currency you do not hold, PayPal prompts you to open a balance for that currency, convert it to your primary balance, or deny the payment. Payments

in currencies for which you hold a balance are applied to the appropriate balance. You see a summary of each currency balance in your Account Overview page.

For more information about currencies associated with your account, see “[Managing Currency Balances](#)” on page 24.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

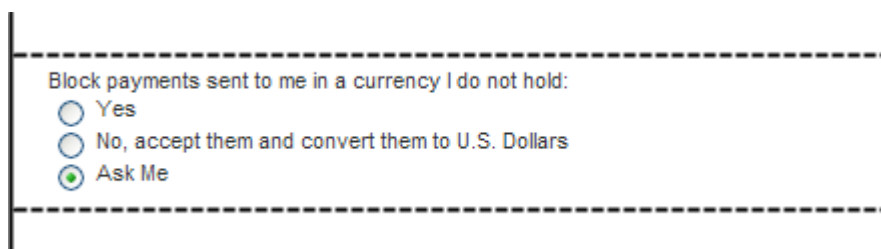
2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down the page to the **Block payments sent to me in a currency I do not hold** section as shown below.



Block payments sent to me in a currency I do not hold:

☐ Yes

☐ No, accept them and convert them to U.S. Dollars

☒ Ask Me

5. Select one of the following options:

- **Yes** – Accept the payment regardless of the currency in which the payment is made.
- **No, accept them and convert them to U.S. Dollars** – Accept the payment, but automatically converts to U.S. Dollars.
- **Ask Me** – Choose whether to accept or deny payment in a currency you do not currently hold on a transaction-by-transaction basis. If you accept the payment, it becomes a completed transaction. If you deny a particular payment, the sender of the payment is notified that the payment has been denied and is credited with the payment amount. PayPal does not charge fees for denied payments.

6. Scroll to the bottom of the page and click **Save**.

Blocking Accidental Payments

You can choose whether to accept payments with the same Invoice ID or to block payments when the Invoice ID was already used.

When you receive payments from buyers, you can include an optional **Invoice ID** field to track payments; buyers will not see this ID. A buyer's Invoice ID must be unique for each transaction. If PayPal receives a payment with an Invoice ID that was used for another payment, PayPal will not accept the transaction.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

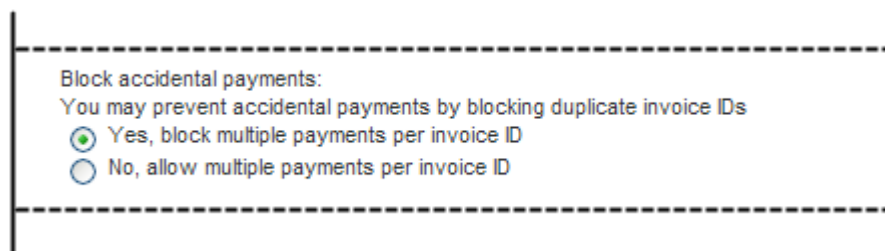
2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down the page to the **Block accidental payments** section as shown below.



Block accidental payments:
You may prevent accidental payments by blocking duplicate invoice IDs

☒ Yes, block multiple payments per invoice ID
☐ No, allow multiple payments per invoice ID

5. Select one of the following options:

- **Yes, block multiple payments per invoice ID** – Do not accept more than one payment per invoice. This option prevents duplicate payments that you must refund.
- **No, allow multiple payments per invoice ID** – Do not limit the number of payments received for an invoice. Choosing this option might result in duplicate payments that require a refund.

6. Scroll to the bottom of the page and click **Save**.

Blocking Payments from Payers With Non-U.S. PayPal Accounts

Because many international addresses cannot be confirmed, you may choose to block payments from users with non-U.S. PayPal accounts in order to qualify for the Seller Protection Policy.

NOTE: By choosing this preference, you will deny non-U.S. users the ability to send you payments. This may significantly reduce your sales volume.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

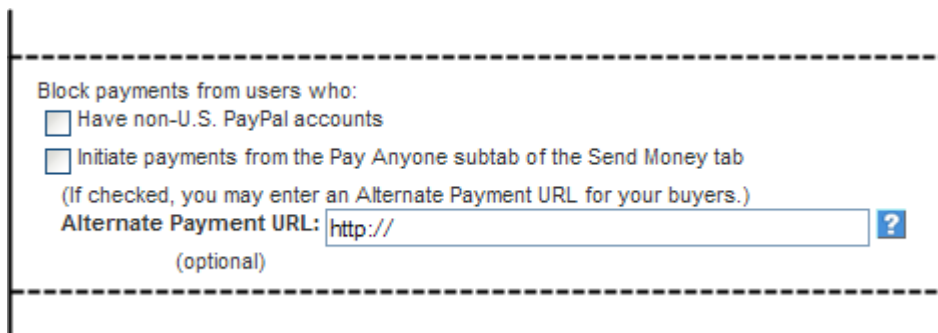
2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down to the **Block payments from users who** section, as shown below.



The screenshot shows a section titled "Block payments from users who:" with two checkboxes: "Have non-U.S. PayPal accounts" and "Initiate payments from the Pay Anyone subtab of the Send Money tab". Below these is a text input field for "Alternate Payment URL:" with the value "http://" and a question mark icon. The text "(optional)" is centered below the input field.

5. Select **Have non-U.S. PayPal accounts**.
6. Scroll to the bottom of the page and click **Save**.

Blocking Payments Initiated Through the Pay Anyone Subtab

You can choose whether or not to receive payments initiated via the **Pay Anyone** subtab of the **Send Money** tab on the PayPal website. Selecting this option might help you manage your account, because the payments you receive will be associated with a specific item or transaction that you defined.

If you block these payments, you accept only payments initiated from **Buy Now**, **PayPal Shopping Cart**, **Gift Certificate**, **Subscription**, and **Donate** buttons, as well as Winning Buyer Notification, Mass Payments, Money Requests, Smart Logos, or eBay Checkout Payments.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down to the **Block payments from users who** section, as shown below

Block payments from users who:

☐ Have non-U.S. PayPal accounts

☐ Initiate payments from the Pay Anyone subtab of the Send Money tab

(If checked, you may enter an Alternate Payment URL for your buyers.)

Alternate Payment URL: ?

(optional)

5. Select **Initiate payments from the Pay Anyone subtab of the Send Money tab**.
6. Scroll to the bottom of the page and click **Save**.

Blocking Payments Funded With eChecks

You can block payments from PayPal members who pay with eChecks. Because eCheck payments take three to four business days to clear, you might want to block them for your **Instant Purchase** and **Buy Now** buttons.

If you choose to block these payments, users who attempt to pay via eCheck are prompted to add a credit card to their account before completing the transaction.

If you choose not to block these payments, you can receive eCheck payments through PayPal Website Payments or Auction Logos. eCheck payments are listed as Pending and are not credited to your PayPal account for three to four business days.

NOTE: You may not block eCheck payments on eBay.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Payment Receiving Preferences** link.

The **Payment Receiving Preferences** page opens.

4. Scroll down to the **Block the following payments** section, as shown below.

Block the following payments:

☐ Pay with eCheck or German bank transfer for all website payments except eBay. **NOTE:** You may not block eCheck payments on eBay.

5. Select the option in the **Block following payments** section.
6. Scroll to the bottom of the page and click **Save**.

Adding Users to Your PayPal Account

If you have a PayPal Business account, you can let people in your organization access your account by adding them as users and granting them specific access privileges. This chapter describes how to determine which privileges to set for users and how to add, edit, and remove users of your account.

Read the following topics to learn more about managing users:

- [Managing Users of Your Account](#)
- [Determining Access Privileges](#)
- [Granting Administrative Access to Another User](#)
- [About PayPal Account Access Privileges](#)
- [Adding a User to Your Account](#)
- [Resetting the Password for a User](#)
- [Removing a User](#)

Managing Users of Your Account

As the holder of a PayPal Business account, you are the *primary* user of the account. You automatically receive all access privileges for your account. One of those privileges is to add users to your account.

To have people in your organization complete tasks for you, add them as *secondary* users to your account by using the **Manage users** function page. For example, you can grant privileges to your accountant to manage funds in your account.

Manage Users lets you add and remove users, add and edit access privileges granted to users, and change user's passwords. Access the **Manage users** page using a link in your account profile.

NOTE: You can add up to 200 users to your PayPal account.

Determining Access Privileges


When you add users to your account, grant them access to different account areas based on their business roles. For example, grant your developers the API Activation & Authorization privilege so they can help complete your account's implementation.

Before adding users to your account, determine which account areas and functions they should access. By granting access only to the information or features they need, you can maintain better control of your account.

When you add a user or modify a user's access, you must select which privileges to grant; PayPal does not set them. You can change the privileges that you grant later, if necessary.

The following chart recommends privileges for different roles in your organization.

NOTE: If your account does not have one of the PayPal features listed, you cannot assign access privileges for it.

 Privileges and roles We recommend that these privileges be assigned to a person in these roles to help run your business <small>Note: The PayPal products that the primary account holder uses determine which privileges are available to be assigned.</small>					
Privileges	Accountant	Administrator	Developer	Virtual Agent	Shipping Agent
Send money	✓	✓			✓
Mass payments	✓	✓			
Request money	✓	✓			
Add funds	✓	✓			
Refunds	✓	✓			
Withdraw funds	✓	✓			
Cancel payments	✓	✓			✓
Recurring payments	✓	✓			
View balance	✓	✓			
View profile	✓	✓			
Bill pay	✓				
Reference transactions	✓				
Virtual terminal	✓				
Edit Profile		✓			
Discuss account with customer service		✓			
Handle authorizations & settlements		✓			
Use PayPal shipping <small>(Note: Send money and Cancel payments are automatically included with this privilege.)</small>		✓			✓
Activate & authorize API			✓		
Schedule and download Transaction History, and run Settlement Report <small>(must be only permission given to this user)</small>				✓	
Close Window					

NOTE: If you assign the **Schedule and download Transaction History, and run Settlement Report** privilege to a user, it must be the only privilege assigned to that user.

When you are adding or editing a user, you can display a popup that contains this chart by clicking the **What privileges do we recommend?** link on the **Add Users** or **Edit user access** pages.

For more details about access privileges, see [“About PayPal Account Access Privileges”](#) on page 19.

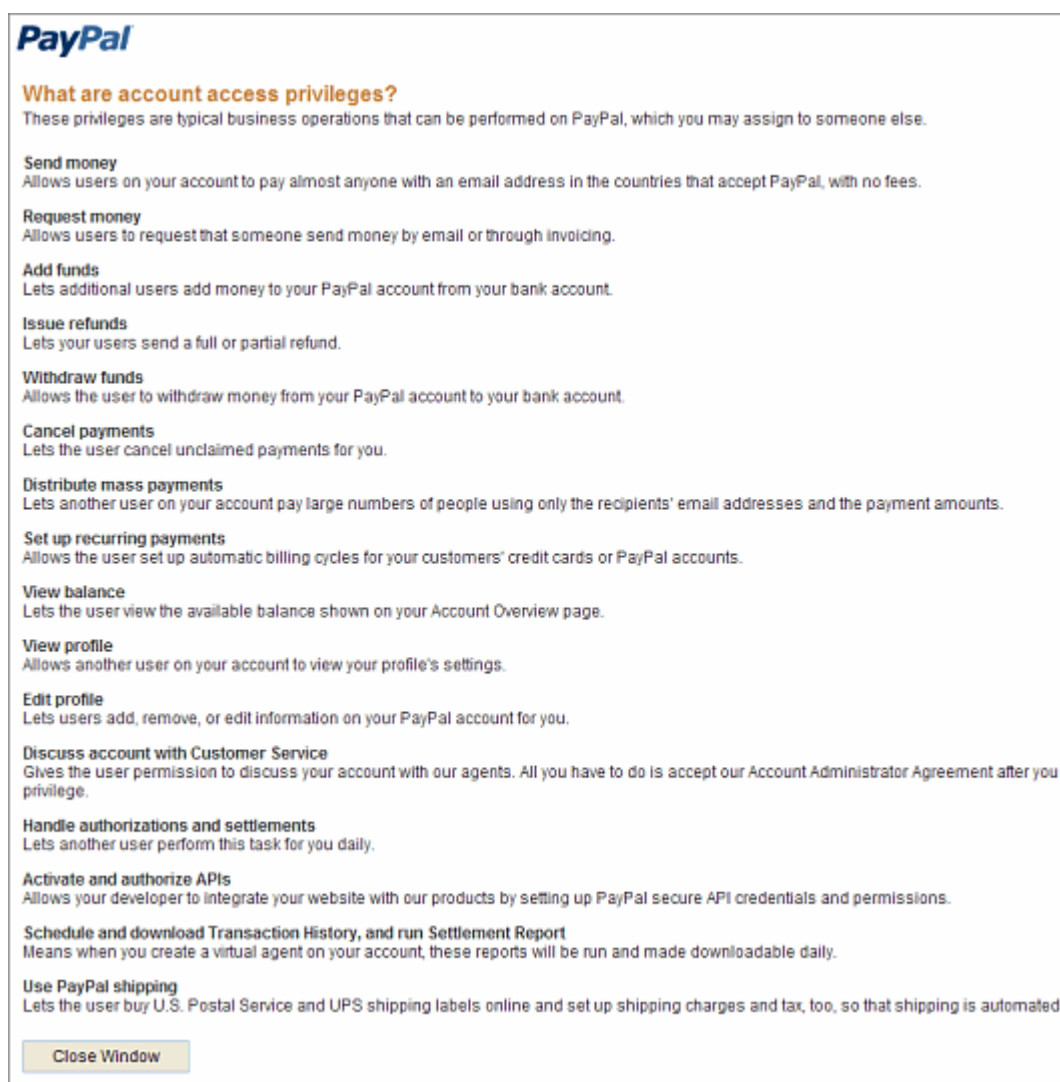
Granting Administrative Access to Another User

When you select the **Discuss account with customer service** privilege, the **Account administrator agreement** page displays. This page outlines the terms that you must accept to grant administrative access to a secondary user.

Read the terms and click **Accept** to grant administrative access to the user. If you click **Decline**, the privilege will not be granted to the user.

About PayPal Account Access Privileges

To help you determine which privileges to grant a user, you can display a popup that describes the access privileges. Each description tell you which tasks are included for the access privilege. For example, if you grant the **Request money** privilege, the user can request money from someone by email or through invoicing.



The screenshot shows a PayPal popup window titled "What are account access privileges?". It lists various privileges and their descriptions:

- Send money**: Allows users on your account to pay almost anyone with an email address in the countries that accept PayPal, with no fees.
- Request money**: Allows users to request that someone send money by email or through invoicing.
- Add funds**: Lets additional users add money to your PayPal account from your bank account.
- Issue refunds**: Lets your users send a full or partial refund.
- Withdraw funds**: Allows the user to withdraw money from your PayPal account to your bank account.
- Cancel payments**: Lets the user cancel unclaimed payments for you.
- Distribute mass payments**: Lets another user on your account pay large numbers of people using only the recipients' email addresses and the payment amounts.
- Set up recurring payments**: Allows the user set up automatic billing cycles for your customers' credit cards or PayPal accounts.
- View balance**: Lets the user view the available balance shown on your Account Overview page.
- View profile**: Allows another user on your account to view your profile's settings.
- Edit profile**: Lets users add, remove, or edit information on your PayPal account for you.
- Discuss account with Customer Service**: Gives the user permission to discuss your account with our agents. All you have to do is accept our Account Administrator Agreement after you privilege.
- Handle authorizations and settlements**: Lets another user perform this task for you daily.
- Activate and authorize APIs**: Allows your developer to integrate your website with our products by setting up PayPal secure API credentials and permissions.
- Schedule and download Transaction History, and run Settlement Report**: Means when you create a virtual agent on your account, these reports will be run and made downloadable daily.
- Use PayPal shipping**: Lets the user buy U.S. Postal Service and UPS shipping labels online and set up shipping charges and tax, too, so that shipping is automated.

At the bottom of the popup is a "Close Window" button.

To display the popup, click the **What are PayPal account privileges?** link on the **Add Users** or **Edit user access** pages.

Adding a User to Your Account

When you add a user to your account, you must provide the following information:

- **User ID** – A unique ID that is 8 to 16 characters long and contains only letters and numbers. Choose the user ID carefully; once assigned, you cannot change it.
NOTE: Do not use an email address as the user ID. User IDs for secondary users do not permit special characters.
- **Password** – A combination of 8-20 characters that contains letters, numbers, and special characters. You can change the password, as needed.
- **User Access** – Select one or more privileges from the list on the page. To help you choose, the recommended privileges are grouped by common roles in an organization.

For more information, see “[Determining Access Privileges](#)” on page 17.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Account Information** column, click the **Manage Users** link.

The **Manage users** page opens.

4. Click the **Add User** button.

The **Add Users** page opens.

5. Change the user settings:

Setting	Action
User's first and last name	Enter the first and last name of the person to whom you want to give access to your account.
User ID	Enter a combination of 8-16 characters. Special characters are not allowed.
Password	Enter a combination of 8-20 letters, numbers, and special characters. Letters in the password are case-sensitive.
Re-enter User ID	Enter the same combination of characters that you entered for User ID .
User Access	<p>Select any of the checkboxes to grant the user specific privileges within your account. Privileges are grouped by user role; each role lists its recommended privileges.</p> <p>Accounting</p> <ul style="list-style-type: none"> – Send money – Request money – Add funds – Refunds – Withdraw funds – Cancel payments – Recurring payments – Mass payments – Bill pay – Reference transactions – Virtual terminal <p>Administration</p> <ul style="list-style-type: none"> – View balance – View profile – Edit profile – Discuss account with Customer Service – Handle authorizations & settlements <p>Integration</p> <ul style="list-style-type: none"> – Activate & authorize APIs <p>Virtual Agent</p> <ul style="list-style-type: none"> – Schedule and download Transaction History and run Settlement Report <p>Shipping Agent</p> <ul style="list-style-type: none"> – Use PayPal shipping

6. Click the **Save** button.

Editing Access Privileges for a User

After you add a user, you can change the user's access privileges. You cannot change the user's name or user ID.

For example, when a user's responsibilities in your organization change, you can add or remove access privileges to reflect the user's adjusted role. Use the **Edit user access** page to make these adjustments.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Account Information** column, click the **Manage Users** link.

The **Manage Users** page opens:

User Name	User ID
<input type="radio"/> Mary Smith	MARYSMITH12
<input type="radio"/> Ed Jones	EDJONES4

4. Select the radio button next to the **User Name**, and click the **Edit** button.

The **Edit user access** page opens, with the **User Name** and **User ID** displayed as read-only text.

5. Select and deselect checkboxes for the access privileges that you want to grant or revoke.
6. Click the **Save** button.

Resetting the Password for a User

If users forget their passwords, you can reset them by using the **Change user password** page.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Account Information** column, click the **Manage Users** link.

The **Manage users** page opens.

4. Select the radio button next to the **User Name** for the user, and click the **Change Password** button.

The **Change user password** page opens, with the **User Name** and **User ID** displayed as read-only text.

5. Change the password settings:

Setting	Action
Password	Enter a combination of 8-20 letters, numbers, and special characters. Letters in the password are case-sensitive.
Re-enter Password	Enter the same combination of characters and special characters that you entered for Password .

6. Click the **Save** button.

Removing a User

When people leave your organization or change to roles that do not need account access, you should remove them from your account. Use the **Remove user** page to remove a user from your account. This page asks for confirmation before removing the user.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Account Information** column, click the **Manage Users** link.

The **Manage users** page opens.

4. Select the radio button next to the **User Name** for the user, and click the **Remove** button.

The **Remove user** page opens, with the **User Name** and **User ID** displayed as read-only text.

5. Click the **Yes** button to permanently remove the user from your account.

Handling Multiple Currencies

PayPal helps you handle multiple currencies in the following ways:

- [Managing Currency Balances](#)
- [Accepting or Denying Cross-Currency Payments](#)

Managing Currency Balances

Use the **Currency Balances** section of your account profile to manage your currency balances, including:

- Opening or closing currency balances
- Selecting your primary currency balance
- Converting funds from one currency balance to funds in another currency balance.

People can pay you in the following currencies; you maintain PayPal balances only in those currencies that you specify.

Currencies and Currency Codes Supported by PayPal

Currency	Currency Code
Australian Dollar	AUD
Brazilian Real	BRL
NOTE: This currency is supported as a payment currency and a currency balance for in-country PayPal accounts only.	
Canadian Dollar	CAD
Czech Koruna	CZK
Danish Krone	DKK
Euro	EUR
Hong Kong Dollar	HKD
Hungarian Forint	HUF
Israeli New Sheqel	ILS
Japanese Yen	JPY
Malaysian Ringgit	MYR
NOTE: This currency is supported as a payment currency and a currency balance for in-country PayPal accounts only.	
Mexican Peso	MXN
Norwegian Krone	NOK
New Zealand Dollar	NZD
Philippine Peso	PHP
Polish Zloty	PLN
Pound Sterling	GBP
Singapore Dollar	SGD
Swedish Krona	SEK
Swiss Franc	CHF
Taiwan New Dollar	TWD
Thai Baht	THB
U.S. Dollar	USD

NOTE: Use the ISO-4217 code for the `currency_code` HTML variable of HTML buttons with monetary amounts in currencies in other than USD.

Selecting Your Primary Currency

Your primary currency is the default currency for sending and requesting payments. If your account has multiple currency balances, you can change which currency is the primary.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Financial Information** column, click the **Currency Balances** link.

The **Manage Currencies** page opens.

4. Click the radio button next to the currency you want to use as the default and click the **Make Primary** button

The **Manage Currencies** page confirms that you changed your primary currency displays (Primary) after the currency name.

Adding Currency Balances

If you want to accept payments in a particular currency, you must add that currency to your account. When you add the new currency, all future payments that you receive in this currency are automatically credited to this balance.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Financial Information** column, click the **Currency Balances** link.

The **Manage Currencies** page opens.

4. Select a currency name from the **Select new currency** dropdown menu and click the **Add Currency** button.

The **Manage Currencies** page confirms that you added a currency balance and displays it in the **Currency** list.

Transferring Amounts Between Currency Balances

Use the Manage Currencies page to move amounts from one currency balance to another. Before confirming the transfer, you can see the currency exchange rate that PayPal will use.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Financial Information** column, click the **Currency Balances** link.

The **Manage Currencies** page opens.

4. Type the amount that you want to transfer in the **From** field and select the currency name from the dropdown menu.
5. Select the currency name that you want to receive the amount from the **To** dropdown menu.
6. Click the **Calculate** button to see the amount in the new currency that will be transferred and the exchange rate used to calculate that amount.
7. Click the **Review Exchange** button to see the details of your transfer.
8. Click the **Exchange Currency** button to complete the transfer.

The **Manage Currencies** page displays the updated balances for the two currencies you used.

Closing Currency Balances

You can close a currency only if there are no funds in that balance. If you still have available funds in that currency, you must transfer those funds to a different currency before you continue. If you receive any future payments in a closed currency, you will be given an option to accept or deny each payment.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Financial Information** column, click the **Currency Balances** link.

The **Manage Currencies** page opens.

4. Click the radio button next to the currency that you want to close.

Note: If the currency does not have a zero balance, you must transfer all funds to another currency before you can remove it.

5. Click the **Close Currency** button.

The **Manage Currencies** page confirms the removal and displays an updated currency list.

Accepting or Denying Cross-Currency Payments

You choose which currencies you accept and how you want to accept them. You can set your **Payment Receiving Preferences** to handle cross-currency payments in different ways.

For more information, see [“Blocking Certain Kinds of Payments”](#) on page 10.

When people make payments in currencies that you hold, the funds appear in your account in the balance of that currency. When people make payments in currencies that you do not hold, you choose whether to accept or deny the payments. These transaction display an **Accept** dropdown menu in the **Order status/Actions** column.

If you accept a payment, receiving fees are assessed in the currency in which the funds were sent. Payments converted to your primary currency are converted at a competitive exchange rate.

1. In the **Order status/Actions** column for the transaction, select **Accept** or **Deny**.

My recent activity Last 7 days (May 5, 2009-May 12, 2009) Last updated 5/12/2009 17:29 PDT [View my transactions](#)

[Archive](#) [What's this](#)

<input type="checkbox"/>	Date	Type	Name/Email	Payment status	Details	Order status/Actions	Gross
<input type="checkbox"/>	May 12, 2009	Payment From	Pat Frommer	Unclaimed	Details	Accept Deny	35.00

[Archive](#) [What's this](#)

Accept or Deny this Payment

Pat Frommer - [Verified Personal Member \(new\)](#) has sent you €35.00 EUR. You will receive €33.63 EUR after a recipient fee of €1.37 EUR is deducted. Please select what you would like to do with this payment:

☒ Accept this payment and convert it to **\$44.68 USD**.

☐ Accept this payment in Euros and create a balance in this currency.

☐ Deny this payment and return the money to the sender.

[Submit](#) [Decide Later](#)

The **Accept or Deny this Payment** page opens.

2. Select what to do with the payment:
 - **Accept the payment and convert it...**
 - **Accept the payment and create a balance...**
 - **Deny this payment and return the money to the sender.**
3. Click the **Submit** button.

2

Setting Controls for PayPal Checkout Pages

Your PayPal account profile lets you set options to control the way your PayPal checkout pages look and operate. These options control the PayPal checkout pages regardless of which PayPal payment solutions you use as a PayPal merchant.

Read the following topics to learn about controlling the PayPal checkout pages:

- [“Co-Branding the PayPal Checkout Pages” on page 29](#)
- [“Getting Contact Telephone Numbers” on page 35](#)
- [“Providing Your Customer Service Number” on page 37](#)
- [“Handling Gift Purchases” on page 37](#)
- [“Prompting Buyers for Marketing Messages” on page 40](#)
- [“Asking Buyers a Survey Question” on page 40](#)
- [“Language Encoding Your Data” on page 41](#)

Co-Branding the PayPal Checkout Pages

Custom payment pages let you co-brand the PayPal checkout pages with your own logo and colors. You can add up to three custom payment page styles.

Read the following topics to learn about co-branding the PayPal checkout pages:

- [“About Custom Payment Pages” on page 29](#)
- [“Accessing Your Custom Payment Pages” on page 31](#)
- [“Adding or Editing a Page Style” on page 32](#)
- [“Making a Page Style Primary” on page 33](#)
- [“Removing a Page Style” on page 34](#)

About Custom Payment Pages

When your account is created, PayPal sets up the default PayPal payment page style in your account profile. Add your own custom payment page styles to co-brand the PayPal checkout pages with your logo and colors.

The PayPal payment page style has PayPal branding only. Depending on your account type, your business name or email address appears in the upper left of the pages.

Example of the Default PayPal Payment Page Style

Designer Fotos Payments by **PayPal**

[Login](#) [Review](#) [Done](#)

Enter Payment Information

PayPal securely processes payments for your merchant, **Designer Fotos**. To continue, please enter the required information below. [Learn more](#) about PayPal.

* indicates required fields Secure Transaction

Payment For	Quantity	Amount
Orchid (32" x 32")	<input type="text" value="1"/>	\$250.00 USD
Subtotal:		\$250.00 USD
Total Amount:		\$250.00 USD

PayPal Checkout

If you already have a PayPal account, enter your login details below.

***Email Address:** [Forgot your email address?](#)

***PayPal Password:** [Forgot your password?](#)

Don't have a PayPal account? [Click here](#)

[Continue](#)

You can add custom payment pages to your account to add the below co-branding features:

- **Header image** – you own logo image, in place of your business name or email address
- **Header background** – a fill color of your choice, above the main page area
- **Header border** – a line color of your choice, above the main page area
- **Background** – a fill color of your choice, surrounding the main page area

Example of a Custom Payment Page Style with Co-Branding Options

Header image Header background Header border

Payments by **PayPal**

DesignerFotos

Login Review Done

Enter Payment Information

PayPal securely processes payments for your merchant, **Designer Fotos**. To continue, please enter the required information below. [Learn more](#) about PayPal.

* indicates required fields [Secure Transaction](#)

Payment For	Quantity	Amount
Orchid (32" x 32")	1	\$250.00 USD
Subtotal:		\$250.00 USD
Total Amount:		\$250.00 USD

PayPal Checkout

If you already have a PayPal account, enter your login details below.

*Email Address: [Forgot your email address?](#)

*PayPal Password: [Forgot your password?](#)

Don't have a PayPal account? [Click here](#)

Continue

Background

Accessing Your Custom Payment Pages

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

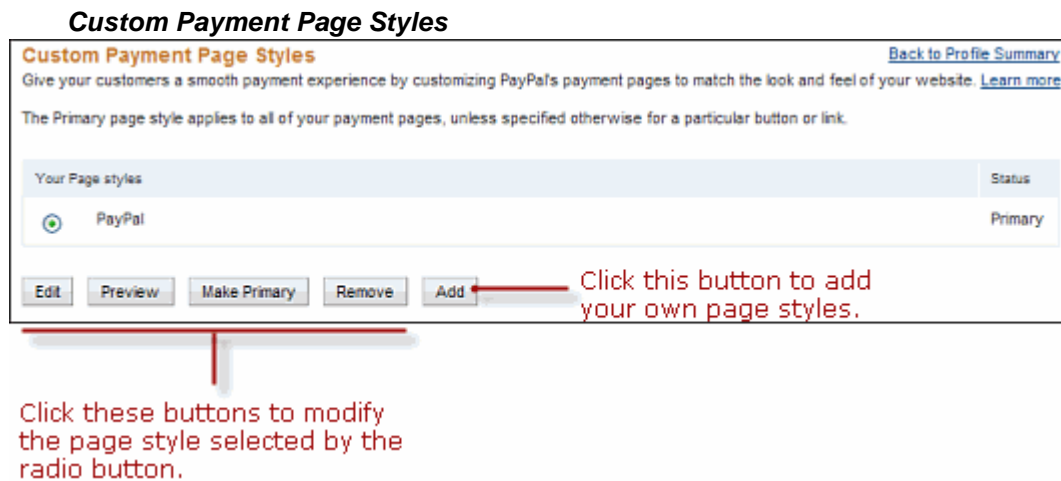
The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Custom Payment Page Styles** page opens.

Result:

From **Custom Payment Page Styles** page, you can add, edit, preview, and remove page styles, as well as making one of the page styles the primary page style.



NOTE: The PayPal page style is a permanent page style. You cannot edit or remove it.

Adding or Editing a Page Style

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Custom Payment Page Styles** page opens.

4. Click the **Add** button or the **Edit** button.

The **Edit Custom Page Style** page opens.

5. Enter your custom page style preferences.

Setting	Action
Page Style Name (required)	Enter a name up to 30 characters long. The name can contain letters, numbers, and underscores, but no other symbols or spaces. The Page Style Name is used to refer to the page style in your PayPal account and in the <code>page_style</code> HTML variable for your Website Payment buttons.
Header Image URL (optional)	Enter the URL for an image that should appear at the top left of the payment page. Maximum size of the image is 750 pixels wide by 90 pixels high; larger images are reduced to this size. The image must be in a valid graphics format such as gif, jpg, or png.
<p>NOTE: PayPal recommends that you enter an image URL only if the image is stored on a secure (https) server. Otherwise, your payer's web browser displays a message that the payment page contains insecure items.</p>	

Setting	Action
Header Background Color (optional)	Enter the border color for the header using HTML hex code. The color code must be six digits long and should not contain the # symbol. The header border is a two-pixel perimeter around the header space.
Header Border Color (optional)	Enter the border color for the header using HTML hex code. The color code must be six digits long and should not contain the # symbol. The header border is a two-pixel perimeter around the header space.
Payment Flow Background Color (optional)	Enter the background color for the payment page using HTML hex code. The color code must be six digits long and should not contain the # symbol.

6. Click the **Preview** button to view a mock-up of your page style.
7. Click the **Save** button to save it.

Making a Page Style Primary

When you make a page style primary, it is applied to all checkout pages unless you specify otherwise in the programming code of individual payment transactions. If you do not designate a page style as primary, the PayPal page style is used.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Custom Payment Page Styles** page opens.

4. Click the radio button next to the page style you that want to make your primary style.

5. Click the **Make Primary** button.

The **Make Custom Page Style Primary** page opens.

- Click the **Make Primary** button to confirm your choice. The designated primary page moves to the top of the Custom Payment Page Styles list.

Custom Payment Page Styles [Back to Profile Summary](#)

Give your customers a smooth payment experience by customizing PayPal's payment pages to match the look and feel of your website. [Learn more](#)

The Primary page style applies to all of your payment pages, unless specified otherwise for a particular button or link.

Your Page styles	Status
<input checked="" type="radio"/> DesignerPageStyle	Primary
<input type="radio"/> PayPal	

[Edit](#)
[Preview](#)
[Make Primary](#)
[Remove](#)
[Add](#)

Removing a Page Style

- Log in to your PayPal website at <https://www.paypal.com>.
The **My Account Overview** page opens.
- Click the **Profile** subtab.
The **Profile Summary** page opens.
- In the **Selling Preferences** column, click the **Custom Payment Pages** link.
The **Custom Payment Page Styles** page opens.
- Click the radio button next to the page style you that want to remove.
- Click the **Remove** button.
- The **Remove Custom Page Style** page opens.
- Click the **Remove** button to confirm your choice.

The designated page no longer appears in the Custom Payment Page Styles list.

Custom Payment Page Styles [Back to Profile Summary](#)

The page style has been removed.

Give your customers a smooth payment experience by customizing PayPal's payment pages to match the look and feel of your website. [Learn more](#)

The Primary page style applies to all of your payment pages, unless specified otherwise for a particular button or link.

Your Page styles	Status
<input type="radio"/> PayPal	Primary

[Edit](#)
[Preview](#)
[Make Primary](#)
[Remove](#)
[Add](#)

Getting Contact Telephone Numbers

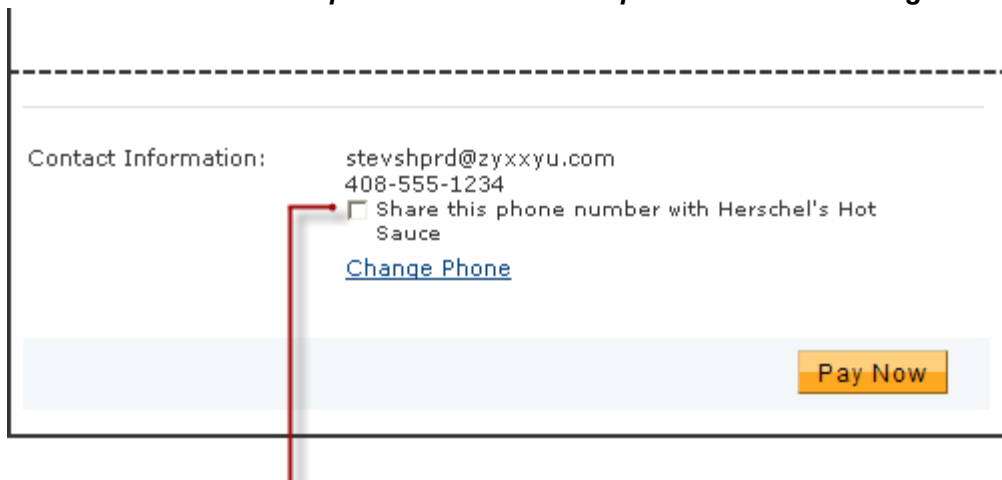
Contact Telephone Number is a feature that lets you obtain the contact telephone numbers that PayPal collects from people who pay you. Contact Telephone Number is off by default.

PayPal always collects contact telephone numbers from people when they sign up for PayPal accounts. PayPal collects telephone numbers to help confirm the identities of account holders and to contact them if necessary to help them with problems on their accounts.

You can turn on Contact Telephone Number in one of two ways:

- **On (Optional Field)** – During checkout PayPal gives people the option of sharing their contact telephone numbers with you.

Merchants Allow People to Share Their Telephone Numbers During Checkout



The screenshot shows a checkout form with the following elements:

- Contact Information:** A label on the left.
- stevshprd@zyxxxyu.com**: The email address.
- 408-555-1234**: The phone number.
- ☐ **Share this phone number with Herschel's Hot Sauce**: A checkbox with a red arrow pointing to it.
- [Change Phone](#): A blue link.
- Pay Now**: An orange button.

Payers select the checkbox to share their contact phone numbers with merchants who turn Contact Phone Number on as an option.

- **On (Required Field)** – During checkout PayPal informs people that their contact telephone numbers will be shared with you because you require it.

Merchants Require People To Share Their Telephone Numbers During Checkout

Contact Information: stevshprd@zyxxxyu.com
408-555-1234
(Herschel's Hot Sauce requires a phone number to complete this order.)
[Change Phone](#)

Pay Now

Payers see a message that their contact phone numbers will be shared with merchants who turn Contact Phone Number on as a requirement.

When people share their contact telephone numbers with you, PayPal includes their shared numbers in the transaction details section of payment authorization notices sent by email. Also, PayPal displays the shared numbers in the Transaction Details page for transactions in which contact telephone numbers were shared. These actions let you and your payers know that contact telephone numbers were shared as part of the transaction.

IMPORTANT: In accordance with the PayPal user agreement, you may use contact telephone numbers only to communicate with the payer about the related transaction. You may **not** use them for unsolicited communication.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Website Payment Preferences** link.

4. Scroll down the page to the **Contact Telephone Number** section.

5. Select one of the following options:

- **On (Optional Field)** – PayPal lets payers share their telephone numbers with you, as an option.
- **On (Required Field)** – PayPal informs payers that their telephone numbers will be shared with you because you require it.
- **Off (PayPal recommends this option)** – PayPal does not share payers' telephone numbers with you.

6. Scroll to the bottom of the page and click **Save**.

Providing Your Customer Service Number

If you offer buyers customer service by phone, you can provide your customer service phone number on the PayPal checkout pages. Buyers who have questions during checkout can talk to customer service agents before completing their purchases.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.

5. Under the **Merchant service options** heading, select the **Display your phone number to customers** checkbox.

The page expands to show your current phone number.

6. Click the **Save** button.

Handling Gift Purchases

If your buyers purchase items to give as gifts, you can enable support for gift purchases in the PayPal checkout pages. Often, buyers want to add gift messages, gift wrap, and gift receipts to their online gift purchases.

Read the following topics to learn more about handling gift purchases:

- “Prompting Buyers for Gift Messages” on page 38
- “Prompting Buyers for Gift Wrapping” on page 38
- “Prompting Buyers for Gift Receipts” on page 39

NOTE: If you are an Express Checkout or a Website Payments Pro merchant, your developers can control these settings through API programming.

Prompting Buyers for Gift Messages

Buyers of gift purchases may want to include a message to their gift recipients. Enable the PayPal checkout pages to prompt buyers for gift messages, because buyers often ship their gift purchases directly to recipients.

When you prompt buyers for gift messages during checkout, they can enter messages up to 150 characters in length.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.

5. Under the **Gift options** heading, select the **Allow gift messages** checkbox.

6. Click the **Save** button.

Prompting Buyers for Gift Wrapping

Buyers may want their gift purchases gift wrapped. Enable the PayPal checkout pages to prompt buyers for gift wrapping if you offer that service.

When you prompt buyers for gift wrapping during checkout, you specify the description of your gift wrapping option. Also, you can specify an amount to charge buyers for the extra service.

NOTE: PayPal displays the prompt to buyers only when the payment is in the same currency as your primary balance.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.
5. Under the **Gift options** heading, select the **Offer gift wrap** checkbox.
6. Enter your gift wrap settings:

Setting	Action
Enter gift wrap description here	Type a description of no more than 25 characters.
Amount	Enter the amount you charge for give wrap, priced in the currency of your primary balance.

7. Click the **Save** button.

Prompting Buyers for Gift Receipts

Buyers of gift purchases may want to include a gift receipt so that recipients can return gift items to you. Enable the PayPal checkout pages to prompt buyers for gift receipts if you allow gift returns.

Gift receipts allow recipients to return or exchange gifts directly, without showing the prices of items.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.
5. Under the **Gift options** heading, select the **Send gift receipts** checkbox.
6. Click the **Save** button.

Prompting Buyers for Marketing Messages

You can increase sales by sending marketing messages to buyers. Enable the PayPal checkout pages to prompt buyers for accepting marketing messages if you run a marketing program.

When you prompt buyers for marketing messages and they accept, you can send them promotional information like sale announcements or newsletters by email. If you choose this option, you also need to offer an unsubscribe service.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.

5. Under the **Merchant service options** heading, select the **Offer promotional emails** checkbox.

6. Click the **Save** button.

Asking Buyers a Survey Question

You can better understanding your buyers by asking them a survey question during checkout. Enable the PayPal checkout pages to ask buyers a survey question so you can find out how to improve your products and services.

When you ask buyers a survey question during checkout, your question can be up to 50 characters long. Buyers answer by selecting choices from a dropdown menu. You can specify up to 5 answers. Each answer can be up to 15 characters long.

For merchants who use Website Payments Standard, this option affects only Buy Now, Add to Cart, and Cart Upload checkout pages.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Custom Payment Pages** link.

The **Customize Your Payment Page** page opens.

4. Click the **Options** tab.

5. Under the **Merchant service options** heading, select the **Add a customer service survey** checkbox.

6. Enter your survey settings:

Setting	Action
Question	Enter the question that you want to ask buyers, up to 50 characters in length. For example, you might ask, "How did you hear about us?"
Answers	Enter up to 5 answers. Each answer can be up to 15 characters in length. For example, your answers might be: "the web" "email" "radio or TV add" "someone I know" "other"

7. Click the **Save** button.

Language Encoding Your Data

Websites that use PayPal in different parts of the world work with different languages and different character encoding schemes. Use your account profile settings to match the character encoding of the PayPal checkout pages with the character encoding of your website.

PayPal refers collectively to differences between languages and character encoding as *language encoding*. You can specify default settings in your account profile for the language encoding that your website uses to exchange data with PayPal. These settings are used for all transactions sent from your website to PayPal and all automated notifications sent from PayPal to your website. However, you can override the default settings on individual transactions.

Character Sets

A *character set* is a defined set of individual letters and symbols used in a particular language. For instance, the ASCII character is commonly used to define the characters in written American English. The Big 5 character set is commonly used to define the characters in written Chinese.

In your account profile, the character set for your default language encoding preferences is known as *your website's language*.

Character Encoding

Character encoding is the way a computer system represents internally the letters and symbols of a particular character set. Computers use the internal representation to store, transmit, and process data.

Different character encoding schemes define the number of bytes each character requires and the pattern of on/off bits that identify a particular character. For example, single-byte encoding schemes, such as ANSI and extended ASCII, allocate one byte for each character or symbol in character set for Western European languages. Other encoding schemes, such as Unicode and UTF-8, allocate several bytes for each character in their multiple-language character sets.

In your account profile, the character encoding for your default language encoding preferences is known simply as *encoding*.

Your Default Language Encoding

When you sign up for a PayPal account, the system determines your default language encoding based on your country of origin. For example, if you sign up with a French postal address, your language encoding preferences are set as:

- **Your website's language** – Western European
- **Encoding** – ANSI

Generally, the default language encoding preferences selected by PayPal is appropriate. In some cases, particularly in Asian countries or with certain operating systems, your website language and/or encoding preferences may not match those used by your website. If not, you must set your language encoding preferences to match the language and encoding that your website uses. Otherwise, data cannot be exchanged with PayPal.

Changing Your Default Website Language

Changing your website language changes the character set used on your website, such as Western European, Japanese, or Russian.

1. Log in to your PayPal account at <https://www.paypal.com>.

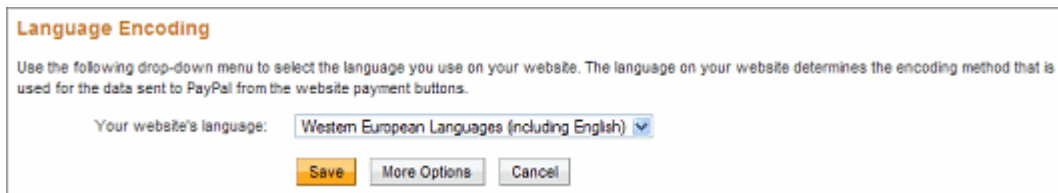
The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Language Encoding** link.

The **Language Encoding** page opens, as shown below.



4. From the **Your website's language** dropdown menu, select an appropriate setting.
5. Click the **Save** button.

Changing the Encoding Used by Your Website

Changing your encoding changes the character encoding scheme used on your website, such as UTF-8, EUC-JP, or KOI8-R.

You might need to select the encoding for data that your website sends to PayPal with Website Payments Standard buttons separately from the data sent by PayPal through Instant Payment Notification, downloadable history logs, and email notifications.

1. Log in to your PayPal account at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

The **Profile Summary** page opens.

3. In the **Selling Preferences** column, click the **Language Encoding** link.

The **Language Encoding** page opens.

4. Ensure that setting for **Your website's language** is correct.

5. Click the **More Options** button.

The **More Encoding Options** page opens.

Integration Guide.' Below this are two buttons: 'Save' (highlighted in orange) and 'Cancel'." data-bbox="162 656 829 839"/>

6. From the **Encoding** dropdown menu, select the appropriate character encoding scheme for data that your website sends to PayPal.

- If you want to use the same encoding scheme for receiving data that PayPal sends to your website, ensure that the **Yes** radio button is selected.
 - If you want to use a different encoding scheme, click the **No** radio button and select the encoding scheme you want to use to receive data from PayPal from the **No, use** dropdown menu.
7. Click the **Save** button to preserve both the encoding options that you selected on this page and the website language you selected on the previous page.

NOTE: You can click the **Cancel** button to return to the previous page and review your choice for website language. However, selections that you made on the **More Encoding Options** page are lost.

3

Viewing Your Account History

With account history and reporting tools, you can access monthly account statements, search your account history for different kinds payments and transactions, download history to your local computer, and access reports about disputed transactions.

Read the following topics to learn about using your account history:

- [“Using Monthly Account Statements” on page 45](#)
- [“Accessing Your Account History” on page 50](#)
- [“Searching History” on page 51](#)
- [“Monitoring Disputed Transactions” on page 63](#)

Using Monthly Account Statements

Monthly account statements list the totals of the payments received, payments sent, fees charged, and other credits and debits that occurred in your account. You must activate monthly account statements to see this information. You activate and view monthly account statements from the **Profile Summary** page. New statements become available on the 15th of each month. Up to three past monthly statements are available at one time. You can print the monthly statement or download it to a spreadsheet.

The monthly account statement displays one line for each date included in the statement. When you first open the statement, account activity amounts display in your default currency; you can view other currencies that your account uses by selecting a currency type.

Viewing Your Account History

Using Monthly Account Statements

Monthly Account Statement

Apr. 2009 Monthly Account Statement

To print your Monthly Account Statement, click [Get Printable Version](#) below.

Currency Type:

Balance	
Beginning Apr. 1, 2009	\$113.54 USD
Ending Apr. 30, 2009	\$40.01 USD

Date	Number of Payments Received	Value of Payments Received	Number of Payments Sent	Value of Payments Sent	Fees	Other Credits	Other Debits	Net
Apr. 1, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 2, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 3, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 4, 2009	0	0.00	1	-59.75	0.00	0.00	0.00	-59.75
Apr. 5, 2009	1	8.15	0	0.00	-0.54	0.00	0.00	7.61
Apr. 6, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 7, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 8, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 9, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 10, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 11, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 12, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 13, 2009	1	8.15	0	0.00	-0.54	0.00	0.00	7.61
Apr. 14, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 15, 2009	0	0.00	1	-29.00	0.00	0.00	0.00	-29.00
Apr. 16, 2009	0	0.00	1	-51.26	0.00	51.26	0.00	0.00
Apr. 17, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 18, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 19, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 20, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 21, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 22, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 23, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 24, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 25, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 26, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 27, 2009	0	0.00	1	-40.00	0.00	40.00	0.00	0.00
Apr. 28, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 29, 2009	0	0.00	0	0.00	0.00	0.00	0.00	0.00
Apr. 30, 2009	0	0.00	1	-62.49	0.00	62.49	0.00	0.00
Totals	2	16.30	5	-242.50	-1.08	153.75	0.00	-73.53

For a copy of PayPal's error resolution notice, [click here](#).

[Get Printable Version](#)
[Download](#)
[Done](#)

Activating Monthly Account Statements

1. Log in to your PayPal website at <https://www.paypal.com>.
The **My Account Overview** page opens.
2. Click the **Profile** subtab.
The **Profile Summary** page opens.
3. In the **Financial Information** column, click the **Monthly Account Statements** link.
The **Monthly Account Statements** page opens.
4. On the **Monthly Account Statements** page, click the **Yes** radio button.



5. Click the **Save** button.

Viewing Monthly Account Statements

You can view and print each statement for three months before it is removed from PayPal's servers. You select a statement from a dropdown menu by its month and year.

1. Log in to your PayPal website at <https://www.paypal.com>.
The **My Account Overview** page opens.
2. Click the **Profile** subtab.
The **Profile Summary** page opens.
3. In the **Financial Information** column, click the **Monthly Account Statements** link.
The **Monthly Account Statements** page opens.

Monthly Account Statements

[Back to Profile Summary](#)

You are currently receiving Monthly Account Statements. Your next statement will be ready by Jun. 15, 2009. You can view and print each statement for 3 months before it is removed from PayPal's servers.

Please select one of your available Monthly Account Statements from the list below:

Apr. 2009

View

To change your Monthly Account Statements preference, make a selection below and click Save.

Would you like to receive Monthly Account Statements?

☒ Yes
 ☐ No

Save

Cancel

4. On the **Monthly Account Statements** page, select a report from the dropdown menu.
5. Click the **View** button.

The **Monthly Account Statement** page opens for the month and year you selected.

6. To view monthly account information for another currency, select a currency from the **Currency Type** dropdown menu.
7. Click the **Done** button to close the statement.

Printing Monthly Account Statements

The monthly account statement displays a button at the bottom of the page that lets you open a printable version of the statement.

0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
-40.00	0.00	40.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00
-62.49	0.00	62.49	0.00	0.00
-242.50	-1.08	153.75	0.00	-73.53

Get Printable Version

Download

Done

Click to display the monthly account statement in a printable window.

Click to download the monthly account statement into Excel.

1. Log in to your PayPal website at <https://www.paypal.com>.
The **My Account Overview** page opens.
2. Click the **Profile** subtab.
The **Profile Summary** page opens.
3. In the **Financial Information** column, click the **Monthly Account Statements** link.
The **Monthly Account Statements** page opens.
4. On the **Monthly Account Statements** page, select a report from the dropdown menu.
5. Click the **View** button.
The **Monthly Account Statement** page opens for the month and year you selected.
6. Click the **Get Printable Version** button at the bottom of the page.
A printable version of the statement opens in a separate window.
7. Click the **Print** button to print the statement.
8. Click the **Close Window** button to close the printable version.
9. Click the **Done** button to close the statement.

Downloading Monthly Account Statements

The monthly account statement displays a button at the bottom of the page that lets you download the statement information to a comma-delimited value (CSV) file.

1. Log in to your PayPal website at <https://www.paypal.com>.
The **My Account Overview** page opens.
2. Click the **Profile** subtab.
The **Profile Summary** page opens.
3. In the **Financial Information** column, click the **Monthly Account Statements** link.
The **Monthly Account Statements** page opens.
4. On the **Monthly Account Statements** page, select a report from the dropdown menu.
5. Click the **View** button.
The **Monthly Account Statement** page opens for the month and year you selected.
6. Click the **Download** button at the bottom of the page.
The **Opening Download.csv** dialog box opens.
7. When prompted, select whether to open the file or to save it on your local computer.

8. Click the **Done** button to close the statement.

Deactivating Monthly Account Statements

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **Profile** subtab.

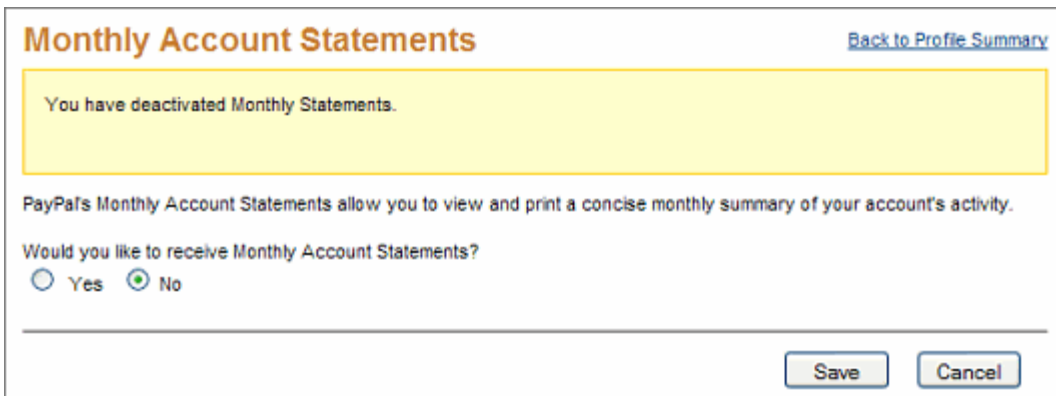
The **Profile Summary** page opens.

3. In the **Financial Information** column, click the **Monthly Account Statements** link.

The **Monthly Account Statements** page opens.

4. On the **Monthly Account Statements** page, click the **No** radio button.

The **Monthly Account Statements** page displays a message indicating that you have deactivated monthly reports. You can reactivate the reports at a later time, if desired.



The screenshot shows the 'Monthly Account Statements' page. At the top, there is a title 'Monthly Account Statements' and a link 'Back to Profile Summary'. Below this is a yellow box with the message 'You have deactivated Monthly Statements.' Underneath the box, it says 'PayPal's Monthly Account Statements allow you to view and print a concise monthly summary of your account's activity.' Then, it asks 'Would you like to receive Monthly Account Statements?' with two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. At the bottom right, there are 'Save' and 'Cancel' buttons.

5. Click the **Back to Profile Summary** link.

Accessing Your Account History

Use the **History** page to see the transactions for your account. When you first open the page, the **History** page displays your current account balance and a list of the transactions that occurred in the last 30 days.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Click the **History** subtab.

The **History** page opens.

History

Balance: \$2,045.14 USD

Recent Activity | All activity | Find a transaction

Today 4/1/2009 to 5/21/2009 Show

All activity | All activity (with balance) | Payments received | Payments sent | Items to ship | More filters

All activity - Apr. 1, 2009 to May 21, 2009

Unarchive What's this

Date	Type	Name/Email	Payment status	Details	Gross	Fee	Net amount
May 21, 2009	Payment From	TempCo	Completed	Details	100.00	-3.20	\$96.80 USD
May 19, 2009	Bill To	TempCo	Paid	Details	1.00	0.00	\$1.00 USD
May 12, 2009	Payment From	TempCo	Completed	Details	35.00	-1.37	€33.63 EUR
May 12, 2009	Payment From	Pat Frommer	Completed	Details	35.00	-1.32	\$33.68 AUD

Unarchive What's this

– or –

To go to a specific area of your account history, place the cursor over the **History** subtab and select one of the following options from the displayed list:

- Basic Search
- Advanced Search
- Download History
- Reports
- IPN History

For more information about searching history, see “[Searching History](#)” on page 51.

Searching History

Search your account history for payments and other activity using date ranges, activity types, or field values. There are two ways to search your account history:

- [Basic Searching by Activity](#)
- [Advanced Searching by Field Value](#)

Use Basic Search to search your transaction history by specifying the kind of account activity you want to view. In Basic Search, the **History** page displays date fields, and links for frequently-used activity types to let you quickly filter your account information. It also contains a **More filters** dropdown menu with additional activity options that you can use.

History

Balance: **\$2,045.14 USD**

Recent Activity | **All activity** | Find a transaction

Today | 4/1/2009 | to 5/21/2009 | Show

All activity | All activity (with balance) | Payments received | Payments sent | Items to ship | More filters

All activity - Apr. 1, 2009 to May 21, 2009

Unarchive | What's this

Date	Type	Name/Email	Payment status	Details	Gross	Fee	Net amount
May 21, 2009	Payment From	TempCo	Completed	Details	100.00	-3.20	\$96.80 USD
May 19, 2009	Bill To	TempCo	Paid	Details	1.00	0.00	\$1.00 USD
May 12, 2009	Payment From	TempCo	Completed	Details	35.00	-1.37	€33.63 EUR
May 12, 2009	Payment From	Pat Frommer	Completed	Details	35.00	-1.32	\$33.68 AUD

Unarchive | What's this

Use Advanced Search to search your transaction history by entering a value or a pattern of values in a specific transaction field and specifying a date range. In Advanced Search, the **History** page displays a search value field, a transaction field dropdown menu, and date range fields.

History

Balance: **\$1,875.00 USD**

Recent Activity | All activity | Find a transaction

Thornton | In Last Name | USD

9/6/2009 | to 9/30/2009 | Search

Search results for 'Thornton' in Last Name from Sep. 6, 2009 - Sep. 30, 2009

Date	Type	Name/Email	Payment status	Details	Gross	Fee	Net amount
Sep. 24, 2009	Payment From	Robert Thornton	Completed	Details	255.00	-7.70	\$247.30 USD
Sep. 23, 2009	Payment From	Robert Thornton	Completed	Details	255.00	-7.70	\$247.30 USD
Sep. 23, 2009	Payment From	Robert Thornton	Completed	Details	255.00	-7.70	\$247.30 USD
Sep. 22, 2009	Payment From	Robert Thornton	Completed	Details	255.00	-7.70	\$247.30 USD

Basic Searching by Activity

Use Basic Search to find transactions by account activity within a specific date range. When you first open the **History** page, it uses the default choice of **All Activity** and displays your account activity for the last 30 days. **All Activity** displays all transactions for any currency you accept in your account. Select another activity type, time frame, or currency type to filter the information you see.

For example, click **All Activity (with balance)** to display a Balance column to show how each transaction affected your balance. Transactions that do not affect your account balance show an ellipsis (. . .) in the column.

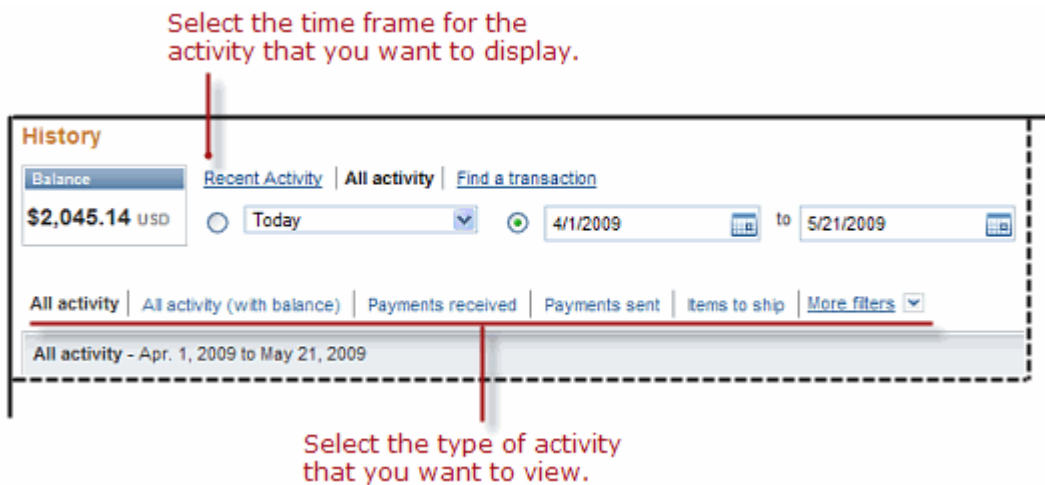
1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Select **Basic Search** from the **History** subtab.

The **History** page opens.

3. Select the time frame for the activity you want to display.



- To search through recent transactions, click **Recent Activity** and select one of the predefined date ranges from the dropdown menu:
- To search through all transactions, click **All Activity**. Type the dates to use or select one of the predefined date ranges from the dropdown menu. Click the **Show** button.

The **History** page displays the transactions that meet your selection criteria.

For detailed information on how to specify a time frame, see [“Specifying Date Ranges for Basic and Advanced History Search”](#) on page 56.

4. To filter the information you see, click one of the activity links:

- Recent Activity
- All Activity
- All Activity (with balance)
- Payments Received
- Payments Sent
- Items to ship

- Or -

Select a filter from the **More filters** dropdown list. The table below shows a list of the options you might see in the dropdown menu.

Basic Search: Selectable Activity Type

Credits	Financial products and services: Reward voucher	Payments on hold: Under PayPal review	Shipping: Items shipped
Currency Conversions	Fraud protection	Payments received: To: <i>email address</i>	Subscriptions and agreements: Billing agreements
eChecks	Money added and withdrawn: Mass payments	Payments received: via: PayPal mobile	Subscriptions and agreements: Pay list: Payments received
Financial products and services: Gift cards	Money added and withdrawn: Money added	Referrals	Subscriptions and agreements: Pay list: Payments sent
Financial products and services: Gift cards (aged)	Money added and withdrawn: Money withdrawn	Refunds	Subscriptions and agreements: Recurring payments: Transactions
Financial products and services: PayPal credit	Money requests	Reversals	Subscriptions and agreements: Recurring payments: My profiles
Financial products and services: PayPal credit payment	Payments on hold: eBay reserves	Shipping: Items to ship	Subscriptions and agreements: Subscriptions

5. To display the transactions in a particular currency, select a currency name from the **All Currencies** dropdown menu.

Advanced Searching by Field Value

Use Advanced Search to find transactions that match a value or a pattern of values in a specific field.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Select **Advanced Search** from the **History** subtab.

- or -

Click the **Find a transaction** link on the **History** page.

The **History** page opens.

If you have multiple currency balances, select one or more checkboxes to search by currency type.

Type a value and select a field to search transaction history by field values.

History

Balance: \$2,045.14 USD

Recent Activity | All activity | Find a transaction

Search for: In:

Currency: ☒ AUD ☒ EUR ☒ USD ☒ ALL

From: 8/11/2009 to: 9/10/2009

Search results for " " in from Aug. 11, 2009 - Sep. 10, 2009

Date	Type	Name/Email	Payment status
------	------	------------	----------------

3. Type the value or pattern in the **Search for** text box.
4. Select one of the following fields from the **In** dropdown menu.

Field	Matching Criteria
Email	The text you enter must exactly match an email address.
Transaction ID	Exact match.
Last Name	Any part of the text you enter can match. For example, the text mit matches Smith and Mitty.
Last Name, First Name	Any part of text can match.
Receipt ID	Exact match.
Invoice ID	Exact match.
Billing Agreement	Exact match.
Profile ID	Exact match.

5. Select one or more currency types in the **Currency** field.

6. Type the dates to use in the **From** and **To** date fields.

For detailed information on how to specify a date range, see [“Specifying Date Ranges for Basic and Advanced History Search”](#) on page 56.

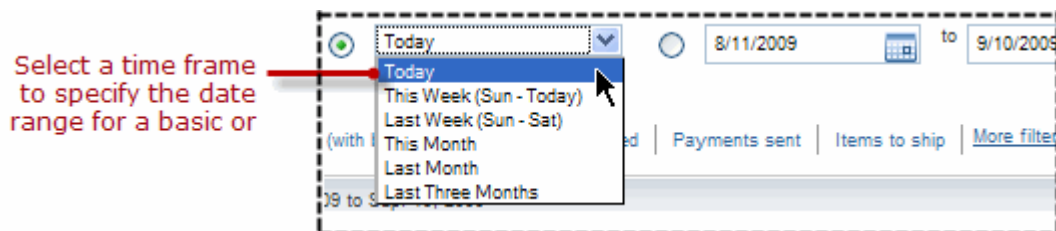
7. Click the **Search** button.

The **History** page displays the transactions that meet your selection criteria.

Selecting Predefined Time Frames for Basic History Search

You can confine your basic history search to a predefined time frame in one of the following ways:

- Click the **Recent Activity** link and select one of these time frames from the dropdown menu:
 - Today
 - This Week (Sun - Today)
 - Last Week (Sun - Sat)
 - This Month
 - Last Month
- Click the **All Activity** link and select the time frame (first) radio button. Select one of these time frames from the dropdown menu:
 - Today
 - This Week (Sun - Today)
 - Last Week (Sun - Sat)
 - This Month
 - Last Month
 - Last Three Months



When you select a predefined time frame, the search begins automatically. The Basic History page lists the transactions within your selected time frame.

Specifying Date Ranges for Basic and Advanced History Search

You can confine your basic and advanced history search to a specific date range in the following ways:

- In the default **History** page, click the **All Activity** link and select the date range (second) radio button.

Specify the beginning and ending dates of the date range using the text boxes or Calendar controls.

Specify the beginning and ending dates of the date range for a basic search.

- In the advanced search version of the **History** page, specify the **From** and **To** dates of the date range using the text boxes or Calendar controls.

IMPORTANT: The duration of the date range you specify affects how quickly you can view the search results. The longer the duration, the longer the search results take. For faster results, narrow the date range.

Downloading History

In addition to viewing payment and transaction information online, you can download the information and save it on your local computer using downloadable history logs. The **Download History** page lets you specify a time frame for payments and transactions to include in these logs. You can also specify the fields to include and the file format to use.

- Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Select **Download History** from the **History** subtab.

The **Download History** page opens.

The screenshot shows the 'Download History' page. It has a title 'Download History' and a sub-header 'Choose from one of the two options below.' There are two main sections: 'Custom Date Range' and 'Last Download to Present'. The 'Custom Date Range' section has a 'From' date field (9/3/2009) and a 'To' date field (9/10/2009). A red line points from the 'To' field to the text 'Enter the date range to use.' The 'Last Download to Present' section has a 'File Types for Download' dropdown menu. A red line points from the dropdown to the text 'Select the file format for your downloadable history log.' There is also a 'Download History' button at the bottom right. A red line points from the button to the text 'Click here to create the downloadable history file, after you specify all options.'

3. In the upper right area of the **History Download** page, click the **Customize Download Fields** link to select which fields you want to include in your downloadable history log.

For more information, see “[Selecting Which Fields to Include in the Download](#)” on page 59.

4. Specify a **Custom Date Range** for the history you want to download, and select an item from the **File Types for Download** dropdown menu.

Your file type choices are:

- Comma Delimited – All Activity
- Comma Delimited – Completed Payments
- Comma Delimited – Balance Affecting Payments
- Tab Delimited – All Activity
- Tab Delimited – Completed Payments
- Tab Delimited – Balance Affecting Payments
- Quicken (.qif file format)

– QuickBooks (.iif file format)

– or –

Select the **Last Download to Present** radio button to download transactions that occurred after the last time you downloaded history. Select an item from the **File Types for Download** dropdown menu.

Your file type choices are:

- Comma Delimited – Completed Payments
- Tab Delimited – Completed Payments
- Quicken (.qif file format)
- QuickBooks (.iif file format)

5. Select the **Include Shopping Cart details** checkbox if you want your downloadable history log to include a row of information for each item associated with shopping cart payments.
6. Click the **Download History** button.
7. When prompted, select whether to open the downloadable history log or to save it on your local computer.

Selecting Which Fields to Include in the Download

Downloadable history logs always contains these fields:

- Date, Time, and Time zone
- Name
- Type, Status, and Currency
- Gross, Fee, and Net
- From Email Address and To Email Address
- Transaction ID and Reference Transaction ID
- Receipt ID

For details about these default fields, see [Appendix A, “Downloadable History Log Fields.”](#)

In addition, you can select other fields to include, using the **Customize My History Download** page.

1. Log in to your PayPal website at <https://www.paypal.com>.

The **My Account Overview** page opens.

2. Select **Download History** from the **History** subtab.

The **Download History** page opens.

3. In the upper right area of the **History Download** page, click the **Customize Download Fields** link, as shown below.

The screenshot shows a web interface titled "History". Below the title, it says "of the two options below." and "Range" followed by "payments that started within the date range you specify." There are date input fields: "From: / 3 / 2009" and "To: 9 / 10 / 2009", with labels "DD", "YYYY", "MM", "DD", "YYYY" below them. Below the date fields is a "Download:" label and a dropdown menu. To the right of the date fields is a box containing links: "Customize Download Fields", "Downloadable History Log", and "Updates". A red arrow points from the text "Click here to select the fields to include." to the "Customize Download Fields" link. Below the links is a "Quicken Notice!" section with a link "View changes to 2005 .qif file format".

4. In the **Customize My History Download** page, select the checkboxes next to the fields that you want to include.

Customize My History Download

Check the boxes next to the fields you want to download. All checked fields will be included in your downloadable log.

Default Fields

Date, Time, Time Zone, Name, Type, Status, Currency, Gross, Fee, Net, From Email Address, To Email Address, Transaction ID, Reference Transaction ID, Receipt ID

PayPal Website Payments

- ☒ Item ID
- ☒ Item Title
- ☒ Invoice Number
- ☒ Custom Number
- ☒ Shipping Amount
- ☒ Insurance Amount
- ☐ Single Column Shipping Address (Address will be displayed in a single column)
- ☒ Multi-Column Shipping Address (Address will be displayed in separate columns)
- ☒ Counter Party Status (Verified vs. Unverified)
- ☒ Address Status (Confirmed vs. Unconfirmed)
- ☒ Sales Tax
- ☒ Option Names and Values
- ☒ Contact Phone Number

Auction Payments

- ☒ Item ID
- ☒ Item Title
- ☒ Shipping Amount
- ☒ Insurance Amount
- ☒ Auction Site
- ☒ Buyer ID
- ☒ Item URL
- ☒ Closing Date
- ☐ Single Column Shipping Address (Address will be displayed in a single column)
- ☒ Multi-Column Shipping Address (Address will be displayed in separate columns)
- ☒ Counter Party Status (Verified vs. Unverified)
- ☒ Address Status (Confirmed vs. Unconfirmed)
- ☒ Sales Tax

Other Fields

- ☐ Subject
- ☐ Note
- ☐ Subscription Number
- ☐ Payment Type
- ☐ Balance Impact (Any transaction that affects account balance)

For details about these optional fields, see [Appendix A, “Downloadable History Log Fields.”](#)

5. Click the **Save** button to preserve your choices for future downloadable history logs.

Understanding the Status and Life Cycle of Transactions

Each row in a downloadable history log shows a transaction, its status at the time of the download, and its effect on your balance.

Various types of transaction statuses and scenarios can have a negative, positive, or neutral balance effect. These statuses include:

- Pending
- Held
- Completed
- Denied
- Refunded
- Cancelled
- Reversed

For a complete list of possible transaction statuses, see [Appendix A, “Downloadable History Log Fields.”](#)

Pending to Cleared or Uncleared

When a pending payment, such as an eCheck, clears after the three to four business days, the transaction status changes from Uncleared to Cleared.

Status of Disputed Transactions

Transactions with a Placed status (for temporary holds) usually involve a customer dispute.

If you are found in favor in a dispute, the transaction will be updated with a new line-item to indicate a Credit. However, if the opposite is true, the Balance Impact column will not change from the Debit status for that transaction.

You can generate a dispute report that correlates the transaction to the customer and the reason for the dispute. For more information, see [“Monitoring Disputed Transactions” on page 63.](#)

Reconciling Transactions using the Balance Impact Column

The optional Balance Impact column shows the word “Credit” for a positive effect or the word “Debit” for a negative effect on your PayPal account balance.

Credit

When you receive an instant payment or credit card transaction, the Balance Impact column indicates a credit. Other possible credits to your account are refunds, reversals, and payments sent but never claimed.

In some cases, a credit line-item can update a debit for a transaction. For example, if you send a payment initially indicated as a debit, but it is denied by the recipient, a new line-item for that transaction will indicate a credit.

Debit

Debits are transactions that reduce your available balance. For example, refunded transactions are recorded as a debit in the Balance Impact column and as completed in the Status column.

Memo Entries

The Balance Impact column can display a Memo entry for transactions that do not affect your balance, such as unclaimed or uncleared transactions. These kinds of transactions have no effect on your balance, because they never become completed transactions.

Reconciling Transactions Using the Net Amount Column

The **Net amount** of a transaction can aid in faster reconciliation.

In most cases, the **Net amount** is the **Gross** minus **Fee**. When a History entry is updated (for example, in the case of a refund), the **Net amount** column indicates the current net value of the transaction on a separate line-item.

Gross, Fee, and Net Amount Calculations from History Log

E	F	G	H	I	J
	Status	Currency	Gross	Fee	Net
al	Refunded	USD	-1.00	0.33	-0.67
ent Received	Completed	USD	100.00	-3.20	96.80
ent Received	Canceled	USD	1.00	-0.33	0.67
ent Received	Completed	USD	44.68	0.00	44.68
ent Received	Completed	USD	35.00	-1.37	33.63

Monitoring Disputed Transactions

With Resolution Center case reports, you can focus only on transactions that are disputed by customers for some reason.

Resolution Center Case Report
Programmatic Access to Resolution Center Case Reports

The Downloadable Dispute Report (DDR) provides merchants with a regular report of newly created disputes and changes in the status of those cases that are already open and are in the midst of processing.

The report is designed for the merchant that processes large volumes of payments. Thus, while the report resembles the Resolution Center case report available via the Resolution Center within the PayPal site, the DDR differs in that it contains all open records and the invoice ID, which can be used to track dispute cases based on your transactional identifiers. The DDR cannot filter on open records.

NOTE: To use this feature, you must sign up for the report through your PayPal Account Manager.

About the DDR Report

The report contains information about all chargebacks and buyer complaints generated for your account. This report does not contain information about ACH returns of PayPal unauthorized complaints. PayPal maintains DDR reports for seven days after which the report is no longer be available.

When you first sign up for the DDR, the report contains:

- All open chargebacks, regardless of the date the case was created or the current status of the case
- All open buyer complaints, regardless of the date the case was created or the current status of the case

Use this report as a starting point against which you will read future DDR reports.

NOTE: If you need to regenerate the first report, contact your PayPal Account Manager and ask them to generate a first day DDR report for you.

Subsequent DDR reports are generated daily and contain information about dispute activity for your account in the past 24 hours, or since the last report was generated, including:

- New cases created
- Cases that were modified, including cases that were closed

The DDR is generated every day based on activity for the previous day. Days with no activity will generate an empty report.

To use the DDR you must:

1. Sign up for the report through your PayPal Account Manager.
2. Create a unique user to download the report.
3. Write code to download the report from a PayPal server.

Step 1. Sign up for the report via PayPal Account Management

Contact your PayPal Account Manager to sign up for the Downloadable Dispute Report.

Step 2. Create a Unique User on PayPal to Download the Report

To use the DDR, you must use PayPal's **Manage User** feature to create a unique user and assign the correct access privileges for downloading reports.

For step-by-step instructions on how to add users to your account, see [“Adding Users to Your PayPal Account” on page 17](#).

Step 3. Write Code to Download the Report from the PayPal Server

Write code to request the report from a PayPal server. The code must send an HTTP POST to the PayPal server. The POST must be sent from a secure server that uses HTTPS. PayPal does not accept requests from servers using HTTP.

You can automate which details you want to be prioritized in your Settlement File reports by assigning values as depicted in the sample HTML code.

The HTML code below is an example of the values that your DDR may contain. In the following example, the uname value is the **User Name** you created in the **Manage users** page.

```
<FORM ACTION="https://www.paypal.com/us/DISPUTE-REPORT-SCHED-LOGIN"
METHOD="post">
  <INPUT TYPE="hidden" NAME="day" VALUE="16">|
  <INPUT TYPE="hidden" NAME="month" VALUE="06">
  <INPUT TYPE="hidden" NAME="year" VALUE="2009">
  <INPUT TYPE="hidden" NAME="uname" VALUE="reportuser2">
  <INPUT TYPE="hidden" NAME="pword" VALUE="2222222">
  <INPUT TYPE="image" VALUE="Submit">
</FORM>
```

View the Report

You will receive an email when the report is ready. This email contains a link to the report that can you view in a browser.

You can also use the email as a trigger for your code to programmatically access the report.



Downloadable History Log Fields

Fields and Values in Downloadable History Logs

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Address Status	Status of counterparty's Shipping Address. Confirmed Non-confirmed	alphanumeric; 14-character limit		address_status
Auction Site	Name of Auction Site: <ul style="list-style-type: none">• eBay• Yahoo! Auctions• uBid.com• Amazon.com Auctions• MSN Auctions• BidVille• Other	alphanumeric; 20-character limit		
Balance	Account balance at time of transaction. Balance is reported in the currency of the transaction. The Balance column can show "..." in some instances, which indicates that showing a balance is not appropriate for these kinds of transaction.	signed decimal		
Balance Impact	Effect of the transaction on the account balance.			
Buyer ID	Unique PayPal customer account identification number.			
Closing Date	Close date of eBay/Auction Item (eBay/Auction-specific)	[M]M/[D]D/YY YY		
Contact Phone Number	Telephone number of the payer.			
Counter Party Status	Account status of buyer: International – Unverified International – Verified Unverified Verified	alphanumeric; 27-character limit		payer_status

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Currency	Currency of transaction	alphanumeric; three character limit	currency_ code	mc_currency settle_ currency exchange_ rate mc_gross
Custom Number	Specified by seller in any of the following button-creation fields: <ul style="list-style-type: none"> • PayPal Shopping Cart Custom Number • Buy Now Custom Number • Subscription Custom Number 	alphanumeric	custom	custom
Date	Date transaction was initiated (according to PayPal system time, US-Pacific time zone). Log sorted in reverse chronological order by Date (most recent first)	[M]M/[D]D/YY YY		payment_date subscr_date
Fee	Fee (if applicable) for transaction	signed decimal		payment_fee mc_fee
From Email Address	Email address of transaction sender	alphanumeric; 128-character limit		payer_email
Gross	Gross amount of transaction	signed decimal	amount	payment_ gross settle_ amount amount1 amount2 amount3
Insurance Amount	Specified by buyer in the website field: <ul style="list-style-type: none"> • eBay/Auction Insurance amount 	unsigned decimal		
Invoice Number	Specified by seller in any of the following button-creation fields: <ul style="list-style-type: none"> • PayPal Shopping Cart Invoice Number • Buy Now Invoice Number • Subscription Invoice Number 	alphanumeric	invoice	invoice

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Item ID	Specified by buyer in the website field: <ul style="list-style-type: none"> • Auction/Item Number Or by seller in any of the following button-creation fields: <ul style="list-style-type: none"> • PayPal Shopping Cart Item Number • Buy Now ID Number • Donations ID Number • Subscription Reference Number 	alphanumeric; 256-character limit	item_number	item_number
Item Title	Specified by buyer in the website field: <ul style="list-style-type: none"> • Auction/Item Title Or by seller in any of the following button-creation fields: <ul style="list-style-type: none"> • PayPal Shopping Cart Item Name • Buy Now Item Name • Donations Item Name • Subscriptions Name 	alphanumeric; 128-character limit	item_name	item_name
Item URL	URL of eBay/Auction Item (eBay/Auction-specific)	alphanumeric; 256-character limit		
Multi-Column Shipping Address	Address displays in separate columns. First line of shipping address as specified by counterparty Second line of shipping address as specified by counterparty (if applicable) Town/City of shipping address as specified by counterparty State/Province/Region/Territory/Prefecture/Republic of shipping address as specified by counterparty Zip/Postal Code of shipping address as specified by counterparty Country of shipping address as specified by counterparty	alphanumeric; 395-character limit alphanumeric; 395-character limit alphanumeric 		address_street1 address_street2 address_city address_state address_zip address_country

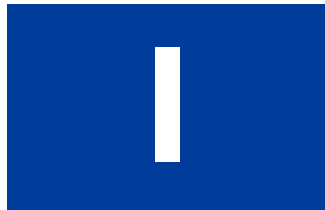
Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Name	Name of counterparty. If counterparty is a PayPal verified user, this field will contain the user's first and last name. If counterparty is not a verified user, field will contain the user's email address.	alphanumeric; 128-character limit	first_name last_name	
Net	Net amount of transaction	signed decimal		
Note	Note for transaction as entered by counterparty	alphanumeric; 2000-character limit		
Option Names and Values	Names: Specified by seller in any of the following button-creation fields: <ul style="list-style-type: none"> PayPal Shopping Cart Option 1[2] Name Buy Now Option 1[2] Name Subscription Option 1[2] Name 	alphanumeric; 60-character limit	on0 on1	option_name1 option_selection1
	Values: Entered by buyer in any of the following website fields: <ul style="list-style-type: none"> PayPal Shopping Cart Option 1[2] Value Buy Now Option 1[2] Value Subscription Option 1[2] Value Or specified by seller in any of the following button-creation fields: <ul style="list-style-type: none"> PayPal Shopping Cart Value 1[2] Choices Buy Now Value 1[2] Choices Subscription Value 1[2] Choices 	alphanumeric; 30-character limit	on1 os1	option_name2 option_selection2
Payment Type	Payment type used for transaction: eCheck Instant PayPal Funds	alphanumeric; 27-character limit		payment_type
Receipt ID	PayPal Account Optional receipt ID	16 digits in xxxx-xxxx- xxxx-xxxx format		receipt_id
Reference Txn ID	Transaction ID of parent transaction	alphanumeric; 17-character limit		

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Sales Tax	Sales Tax Amount specified in seller's button-creation process and Profile preferences	unsigned decimal	tax	
Shipping Amount	Specified by buyer in the website field: <ul style="list-style-type: none"> eBay/Auction Shipping amount Or by seller in any of the following button-creation fields: <ul style="list-style-type: none"> PayPal Shopping Cart Shipping amount Buy Now Shipping amount 	unsigned decimal	shipping shipping2 handling	
Single Column Shipping Address	Address displays in a single column.			
	First line of shipping address as specified by counterparty	alphanumeric; 395-character limit		address_street1
	Second line of shipping address as specified by counterparty (if applicable)	alphanumeric; 395-character limit		address_street2
	Town/City of shipping address as specified by counterparty	alphanumeric		address_city
	State/Province/Region/Territory/Prefecture/Republic of shipping address as specified by counterparty			address_state
	Zip/Postal Code of shipping address as specified by counterparty			address_zip
	Country of shipping address as specified by counterparty			address_country

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Status	Status of transaction at time of download: Canceled Cleared Completed Denied Expired Failed Pending Refunded Returned Reversed Unclaimed Uncleared	alphanumeric; 10-character limit		payment_ status pending_ reason
Subject	Subject of transaction as entered by counterparty	alphanumeric; 256-character limit		
Subscription Number	PayPal-generated Subscription Transaction ID Number S-xxxxxxxxxxxxxxxxxx where x is the transaction ID.	alphanumeric; 19-character limit		subscr_id
Time	Time transaction was initiated (according to PayPal system time, US-Pacific time zone).	HH:MM:SS		
Timezone	The time zone used for recording transactions in your PayPal account.	Alphanumeric; three-character codes		
To Email Address	Email address of transaction recipient	alphanumeric; 128-character limit	business	receiver_email
Transaction ID	PayPal-generated unique transaction ID	alphanumeric; 17-character limit		txn_id

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Type	Type of transaction: Add Funds from a Bank Account ATM Withdrawal ATM Withdrawal Reversal Auction Payment Received Auction Payment Sent Canceled Fee Canceled Payment Canceled Transfer Chargeback Settlement Check Withdrawal from PayPal Currency Conversion Debit Card Cash Advance Debit Card Purchase Dividend From PayPal Money Market Donation Received Donation Sent eCheck Received eCheck Sent continued...	alphanumeric; 39-character limit		txn_type

Field Name	Description	Format	Payment Button Variable	Related IPN Variable
Type (continued)	Funds Added with a Personal Check			
	Guarantee Reimbursement			
	Payment Received			
	Payment Sent			
	PayPal			
	PayPal Balance Adjustment			
	Referral Bonus			
	Refund			
	Shopping Cart Item			
	Shopping Cart Payment Received			
	Shopping Cart Payment Sent			
	Subscription Payment Received			
	Subscription Payment Sent			
	Transfer Update to Add Funds from a Bank Account			
	Update to Debit Card Credit			
	Update to eCheck Received			
	Update to Payment Received			
	Update to Payment Sent			
	Update to Reversal			
	Update to Web Accept Payment Received			
	Virtual Debit Card Authorization			
	Virtual Debit Card Credit Received			
	Virtual Debit Card Purchase			
	Virtual Debt Card Credit Received			
	Web Accept Payment Received			
	Web Accept Payment Sent			
	Withdraw Funds to a Bank Account			



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