

PayPal Integration

Using our Webshop feature, Standard ERP users can sell and receive payments using PayPal as a payment gateway. This document will describe technical requirements about this topic, including all settings necessary to enable the feature.

Register on PayPal and get Credentials

The first step to being able to offer PayPal as a payment option is to register an account on PayPal as a business customer and get the API credentials.

Go to www.paypal.com website and create a new business account for your company. After creating the account follow those steps to get API credentials:

1. Go to <https://www.paypal.com/businessmanager/credentials/apiAccess> and click on "Manage API credentials".
2. Request Signature
3. Save the username, password and signature for later

Settings in Standard ERP

1. Go to **System module >> Settings >> Countries**. Specify the two character ISO-3166-1 code for each country using the field ISO Code. On "Misc" card select the "Show on web" option for the countries you want customers to be able to register on your website. Make sure the Country is added to the Invoice and Delivery Addresses in your Contact cards and if you have **Sales Order module >> Settings >> Delivery Addresses**. If registrations are allowed on the web, make the Country a required field.

Sample: Country: Update

Code GBR

Text United Kingdom

Duty Codes _____

Region _____ Nationality _____

Currency GB ISO Code GB

Tax Code _____ VAT Reg. No. _____

Text Misc

Freight Code _____

Price List _____

Discount Matrix _____

Sales Tags/Objects _____

VAT Zone

- Domestic
- Inside EU
- Inside EU (Post VAT)
- Outside EU
- Outside EU (Post VAT)

Show on web

2. Go to **Webshop module >> Settings >> Merchant ID**. Create a new record where Partner = Paypal. Choose the Live option when you are ready to receive payments from customers through the webshop.

Sample: Merchant ID: New

Code PAYPAL

Comment _____

Partner Paypal

Type

- Test
- Live

3. Go to **Webshop module >> Settings >> Payment Gateways**. Create a new record, add a Code and Comment and fill in the fields as described:

On "Misc" Card:

- > Currency: The currency that will be used for PayPal payments. Currency code can be downloaded from <https://www.currency-iso.org/en/home/tables/table-a1.html>
- > Merchant ID: The Merchant ID created on step 2
- > Type radiobutton: Web

Sample: Payment Gateway: Inspect

Code PAYPAL

Comment PayPal

Misc SOP Swish PayPal M-Pesa Costs

Account No./Phone No. _____

Local Machine _____

Currency GBP

Refund Password _____

Merchant ID PAYPAL

Key _____

URL _____

Serial No. _____

Terminal ID _____

Seconds _____ for disallowing duplicate transactions

Options

- Send Invoice Address
- Send Delivery Address
- Send Invoice Information
- Send Data for Corporate Cards

PayPal Integration

On “PayPal” Card:

Fill in the fields with the API credentials obtained on your PayPal registration.

Sample: Payment Gateway: Inspect

Code PAYPAL

Comment PayPal

Misc SOP Swish **PayPal** M-Pesa Costs

PayPal API Credentials

Username _____

Password _____

Signature _____

Use the Element field in case you want explanatory text or image to display next to “Pay with PayPal” on the website.

Sample: Web Payment Method: Inspect

Code PAYPAL Method Paypal

Comment _____

Pay Term CC Pay Mode GB

Element _____

Classification _____

Excl. Classif. _____

Paying with PayPal

When a customer selects the “Pay with PayPal” option on the webshop, what happens in Standard ERP is described below:

- A new record will be created in the Payment Sessions settings and marked as Completed.
- Customers will be taken to the PayPal website where they can pay.
- Invoice, Order or Receipt will be created depending on your “Create after Payment” option.
- An email confirmation will be sent if that has been set up in Standard ERP.
- The record in the Webshop Baskets setting will be deleted.

4. Go to **Webshop and CMS module >> Settings >> Web Payment Methods**. Create a new record. In the Method field choose PayPal from paste special.

You can also define in this window Payment Methods and Terms if you want to create an Invoice and/or Order after the Payment, or a Pre-payment receipt.