



Integration Requirements for Partners 2009

PayPal Integration Requirements for Partners 2009

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Preface

About This Publication

Over the last several years, PayPal has put a significant amount of effort into studying the practices of the most successful PayPal merchants and partners. From these studies, PayPal has put together a set of best practices for each of its payment gateway options that have been shown to increase sales conversion. Many of these best practices have now become partner integration requirements. In creating these best practices, PayPal's goal is to make sure that the buyer has:

- A faster, safer, and easier online shopping experience
- The best possible checkout experience

This publication contains the integration requirements for PayPal products. PayPal partners who want to participate in the PayPal Partner Program must implement all necessary integration requirements, as outlined in this publication. Partners that do not integrate these requirements by the deadline will not benefit from the PayPal Partner Programs.

For partners in the PayPal Partner Program, the requirements will be updated each year and will be published during the first quarter of the year. The integration/certification deadline for 2009 and 2010 are December 15, 2009 and June 15, 2010, respectively.

NOTE: Please plan on several weeks lead-time for the certification process. See [“Integrate and Certify All Relevant PayPal Products You Offer Merchants” on page 9](#) for more information about certification.

Intended Audience

This publication is intended for all PayPal partners who are integrating PayPal products, especially those planning to participate in the PayPal Partner Program. These partner types include, but are not limited to, shopping cart, web hosting, and eCommerce platform providers.

The content within this guide is appropriate for both website designers as well as the developers who will integrate with the PayPal APIs.

Where to Go for More Information

Product	Resources
All products	https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/howto_overview
Website Payments Standard	https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_html_cart_upload
Express Checkout	https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_api_ECGettingStarted
PayPal Partner Program	https://www.paypal-marketing.com/emarketing/partner/portal/
PayPal Product Certification	https://www.paypal-marketing.com/emarketing/partner/portal/

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Requirements Checklist

This chapter contains checklists to help you meet the integration requirements for the PayPal 2009 Partner Program. You must complete all items in the following checklists. Exceptions are marked as recommended. More details about each of these requirements are found at the indicated pages.

General Requirements Checklist

- ☐ “Integrate and Certify All Relevant PayPal Products You Offer Merchants” on page 9
- ☐ “Provide Access to Your eCommerce Site Software and Administration Tool” on page 9
- ☐ “Build Notation Code Requirements for Partner Identification” on page 10
- ☐ “Implement Product Selection Flow (Recommended)” on page 11
- ☐ “Integrate Partner Onboarding Flow (Recommended)” on page 11

Website Payments Standard Checklist

- ☐ “Integrate Website Payments Standard Payment Processing Functionality” on page 12
- ☐ “Implement Payment Processing” on page 14
- ☐ “Implement Website Payments Standard from the Shopping Cart Page” on page 16
- ☐ “Implement “Buy Now” or “Add to Cart” Buttons (Hosting Providers Only)” on page 18
- ☐ “Implement Buyer Experience Requirements on PayPal Checkout Pages” on page 22
- ☐ “Implement Instant Payment Notification (Recommended)” on page 27

Express Checkout Checklist

- ☐ “Integrate the Express Checkout API” on page 28
- ☐ “Integrate Express Checkout Flow Requirements” on page 29
- ☐ “Display Order Details Requirements” on page 31
- ☐ “Optimize Your Checkout Flow with Instant Update API (Recommended)” on page 32

- ☐ “Integrate PayPal Express Checkout Button” on page 34
- ☐ “Place PayPal Acceptance Mark on Payment Methods Page” on page 37
- ☐ “Place Additional Options Banner on the Home Page and Product Details Page (Recommended)” on page 39
- ☐ “Offer Express Checkout to Your Merchants” on page 41
- ☐ “Enable Your Merchants to Configure Express Checkout” on page 43

Transaction Management

- ☐ “Integrating PayPal into Your Back Office (recommended)” on page 50

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General Requirements

This chapter contains requirements that PayPal Partners must implement for all relevant products. You must implement the following general requirements:

- ❑ “Integrate and Certify All Relevant PayPal Products You Offer Merchants” on page 9
- ❑ “Provide Access to Your eCommerce Site Software and Administration Tool” on page 9
- ❑ “Build Notation Code Requirements for Partner Identification” on page 10
- ❑ “Implement Product Selection Flow (Recommended)” on page 11
- ❑ “Integrate Partner Onboarding Flow (Recommended)” on page 11

Integrate and Certify All Relevant PayPal Products You Offer Merchants

You must integrate and certify any of the PayPal products that you offer to merchants:

- PayPal Website Payments Standard
- PayPal Express Checkout

Download the PayPal Product Certification Guidelines from <https://www.paypal-marketing.com/emarketing/partner/portal/>

NOTE: Partner Program members must integrate and certify all PayPal products offered to their merchants to be eligible for Gold or Platinum program status. Find more information about the PayPal Partner Program at <https://www.paypal-marketing.com/emarketing/partner/portal/landing.page?uid=be09b28aLhtzkz>

Provide Access to Your eCommerce Site Software and Administration Tool

To ensure that your integration meets PayPal requirements as described in this publication, you must provide PayPal with access to a fully functioning site similar to those offered to your customers. You must also provide a URL, username, and password to the site’s administration tool that allows configuration of components of the site, including the web site look and feel, payment options, and checkout experience. If you offer multiple versions of your software, such as Basic, Professional, and Premium versions, you must provide PayPal with access to the version that offers maximum flexibility in terms of payments options and buyer and checkout experience.

The test site and account must be available by November 1, 2009. At that time, PayPal will start testing partner integrations to ensure that they meet integration requirements.

Build Notation Code Requirements for Partner Identification

PayPal provides a build notation (BN) code to identify PayPal partners. The BN code alerts PayPal when partner software submits a transaction.

Requirements

You must submit the BN code with every transaction that you process with PayPal products. Request for your BN code from your PayPal representative.

Sample Code for Website Payments Standard

Enter the BN code in the bn variable as shown in the following sample code for a Checkout button that performs a cart upload for U.S. merchants:

```
<form action="https://www.paypal.com/cgi-bin/webscr" method="post">
  <input type="hidden" name="cmd" value="_cart">
  <input type="hidden" name="upload" value="1">
  <input type="hidden" name="business"
value="merchants@samplemerchant.com">
  <input type="hidden" name="item_name_1" value="Item Name 1">
  <input type="hidden" name="amount_1" value="1.00">
  <input type="hidden" name="item_number_1" value="12345" />
  <input type="hidden" name="shipping_1" value="0.50" />
  <input type="hidden" name="tax_1" value="0.15" />
  <input type="hidden" name="item_name_2" value="Item Name 2">
  <input type="hidden" name="amount_2" value="2.00">
  <input type="hidden" name="item_number_2" value="67890" />
  <input type="hidden" name="paymentaction" value="sale" />
  <input type="hidden" name="bn" value="HipKarts_ShoppingCart_WPS_US">
  <input type="submit" value="Checkout">
</form>
```

Sample Code for Express Checkout

In the DoExpressCheckoutPayment API request, the BN code is the value of the BUTTONSOURCE parameter. The following example shows BUTTONSOURCE in DoExpressCheckoutPayment:

```
requiredSecurityParameters]&
METHOD=DoExpressCheckoutPayment&
TOKEN=EC-0E881823PA052770A&
AMT=10.00&
```

```
PAYERID=95HR9CM6D56Q2&  
PAYMENTACTION=Sale&  
BUTTONSOURCE= HipKarts_ShoppingCart_EC_US
```

Implement Product Selection Flow (Recommended)

In 2008, PayPal conducted a partner usability research study to identify ways to eliminate confusion associated with merchants selecting the right payment options for their business. Based on the findings of this study, PayPal has created a best-in-class Product Selection Flow that increases conversion for partners by making it easy for merchants to select the right payment option (PayPal or non-PayPal) for their online stores.

To see the detailed research findings, visit <https://www.paypal-marketing.com/url/2092380250>.

Integrate Partner Onboarding Flow (Recommended)

PayPal recommends new Onboarding Flow processes for your new PayPal merchants. The Partner Onboarding Flow processes provide clear instructions to merchants about how to open a PayPal account when they reach PayPal from the Partner's site. Messaging within this new flow process helps reduce merchant abandonment and is expected to have a positive revenue impact for partners.

To get more details go to <https://www.paypal-marketing.com/url/2092380251>.

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Website Payments Standard Requirements

This chapter contains the requirements for offering Website Payments Standard to your customers in need of a credit card processing solution. These requirements will help ensure that:

- The merchant is able to understand the benefits and choose Website Payments Standard as their payment processing solution.
- The buyer has the best possible checkout experience with Website Payments Standard.

Requirements

You must meet the following Website Payments Standard integration requirements:

- ☐ “Integrate Website Payments Standard Payment Processing Functionality” on page 12
- ☐ Provide Website Payments Standard as a payment processing choice to your merchants.
 - “Website Payments Standard Messaging” on page 13
 - “Allow Merchants to Configure Website Payments Standard” on page 13
- ☐ Implement checkout flow requirements.
 - “Implement Payment Processing” on page 14
 - “Implement Website Payments Standard from the Shopping Cart Page” on page 16
 - “Implement “Buy Now” or “Add to Cart” Buttons (Hosting Providers Only)” on page 18

PayPal strongly encourages you to meet the following recommendation:

- ☐ “Implement Instant Payment Notification (Recommended)” on page 27

NOTE: For more information about Website Payments Standard, see https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/howto_html_wp_standard_overview.

Integrate Website Payments Standard Payment Processing Functionality

You must integrate the Website Payments Standard features that allow your merchants to accept payments. Please remember that you must submit the BN code with every transaction that you process with PayPal products.

NOTE: For integration details, see the [Website Payments Standard Integration Guide](#).

Website Payments Standard Messaging

To better inform your merchants about PayPal, use messaging that describes Website Payments Standard to your merchants in the payment provider section of your administration tool. Please use one of the following two options when you describe Website Payments Standard:

- *Option 1 (34 words):* **PayPal Website Payments Standard** is a fast, affordable way to start accepting credit cards and PayPal payments online. Your buyers pay on secure PayPal pages, but *do not* need a PayPal account to pay you.
- *Option 2 (65 words):* **PayPal Website Payments Standard.** Now there's a fast, affordable way to start accepting credit cards and PayPal payments online. Buyers pay by entering their credit card information on secure PayPal pages and promptly return to your site. Your buyers *do not* need a PayPal account. Start selling immediately – you don't need to go through a lengthy approval process or pay any setup or monthly fees.

Additional Benefits for Website Payments Standard

PayPal strongly recommends that you make use of these PayPal benefit messages on your site.

- **Easy to manage**
 - PayPal sends automatic order confirmation email messages to both you and your customers.
 - Get simple sales activity and accounting reports that you can export to Intuit QuickBooks or Microsoft Excel.
 - Sell internationally with automatic currency conversion.
- **Fraud protection**
 - PayPal includes some of the industry's best automatic fraud screening technology.
 - Eligible transactions are covered against unauthorized payments, charge-backs, and reversals through PayPal's Seller Protection Policy.
 - You don't need to store or transmit sensitive payment data, because your customers pay on secure pages hosted by PayPal.
- **Affordable pricing**
 - You don't pay a thing until you get paid — no setup fees, monthly fees, or cancellation fees.
 - Low per-transaction fees typically range from 1.9% to 2.9% plus \$.30, depending on how much revenue you take-in each month. The higher your volume, the lower your rate.

Allow Merchants to Configure Website Payments Standard

- ☐ On the page where your merchants configure or select Website Payments Standard as a payment solution, provide a field for the email address where your merchant will receive

payments from customers. Pre-populate that field with your merchant's email address. Allow your merchant to edit this email address as needed. To receive payment to a PayPal account that they already have, your merchant must provide the email address of that account.

- ☐ Provide a **More** link to the additional benefits information about Website Payments Standard (see “[Website Payments Standard Messaging](#)” on page 13).
- Provide a **See demo** link to the Website Payments Standard demo. The URL for the demo is: <http://www.paypal-marketing.com/html/partner/portal/standard.html>

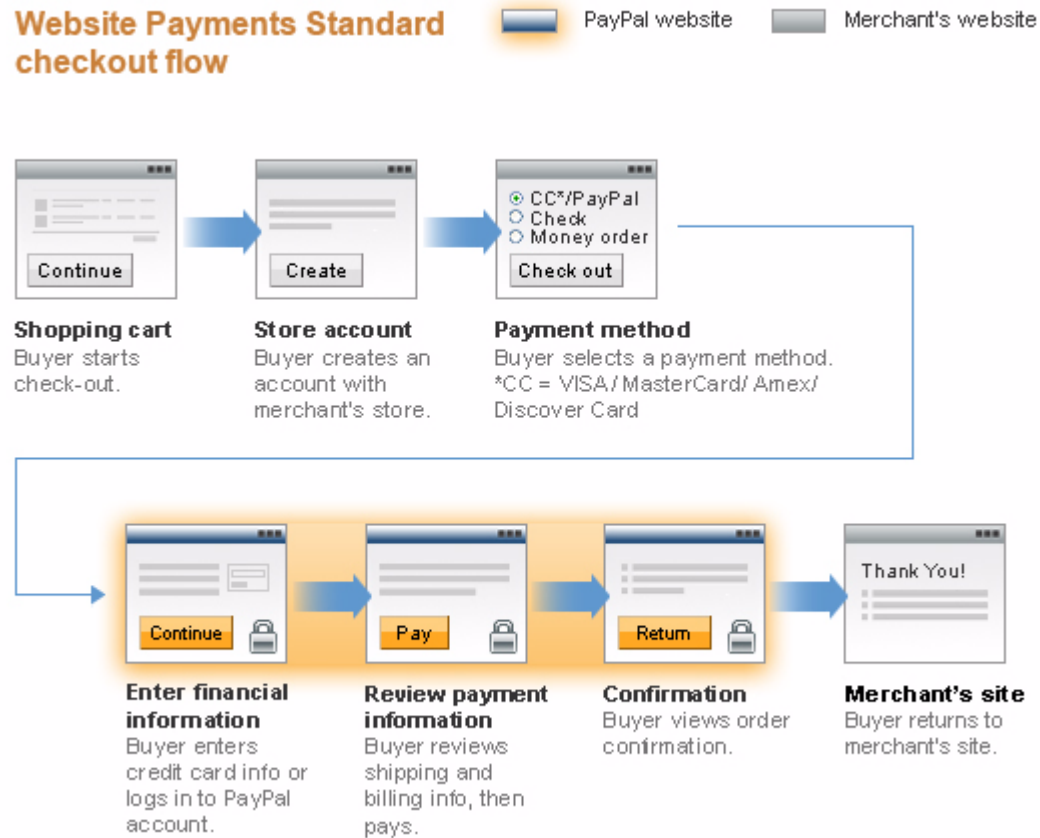
Implement Payment Processing

This section describes the requirements for the payment methods page. You must implement the following requirements:

- ☐ “[Enable Checkout from the Payment Methods Page](#)” on page 14
- ☐ “[Payment Methods Page Requirements](#)” on page 15

Enable Checkout from the Payment Methods Page

- ☐ Enable buyers to check out from the payment methods page, after creating a store account (if you offer these) or selecting shipping options. If you plan to offer payment methods in addition to credit or debit cards and PayPal, enable buyers to select additional payment methods such as check or money order.
- ☐ Do not add pages or pop-ups between your payment method page and the first PayPal page.
- ☐ Do not add warnings or legal text in the checkout experience.

Website Payments Standard checkout flow**Website Payments Standard checkout flow****Payment Methods Page Requirements**

- ☐ Group Visa, MasterCard, American Express, Discover, debit cards, and PayPal.
 - Group other payment options separately. For example, group check, cash, and money order separately.
- ☐ Display the Visa, MasterCard, American Express, Discover, debit cards, and PayPal payment option as the default option.

IMPORTANT: PayPal does not recommend the use of a drop-down menu to select a payment option.

Payment methods page

The screenshot shows a shopping cart page for 'WebsiteName.com'. At the top, there's a search bar and links for 'My Account' and 'Help'. Below the search bar, there's a 'Sign In' link and a 'New User? Sign up' link. The main section is titled 'Your shopping cart' and is divided into two columns: 'Shipping Address' and 'Shipping Method'. The shipping address is 'John Smith, 123 Main Street, Mountain View, CA 94043, USA'. The shipping methods are '1 Day Air via DHL (\$26.00)', '2 Day Air via DHL (\$16.00)', and 'UPS Ground (\$6.00)'. Below this, there's a 'Payment Options' section with radio buttons for 'Credit/debit card/PayPal', 'Check', and 'Money order'. The 'Credit/debit card/PayPal' option is selected, and there are logos for MasterCard, VISA, American Express, Discover, and PayPal. The bottom section is a table with three columns: 'Item(s)', 'Shipping', and 'Price'. It lists two items: 'Tea Set' (item #: 122548636) and 'Stiletto-Heeled Shoes' (item #: 225425635). The 'Tea Set' is priced at \$59.95 (was \$98.00) and the 'Stiletto-Heeled Shoes' are priced at \$15.95 (was \$25.00). Both items usually ship within 1 to 2 days. At the bottom right, there's a summary: 'Items Total: \$75.90', 'Shipping: \$19.95', and 'Sub-Total: \$95.85'. A green button labeled 'Proceed to Checkout' is located below the summary. At the very bottom, there's a copyright notice: 'Copyright @ websiteName. All rights reserved.'

Implement Website Payments Standard from the Shopping Cart Page

This section describes the requirements for the shopping cart page. You must implement the following requirements:

- ☐ “Enable Checkout from the Shopping Cart Page” on page 16
- ☐ “Shopping Cart Page Requirements” on page 17

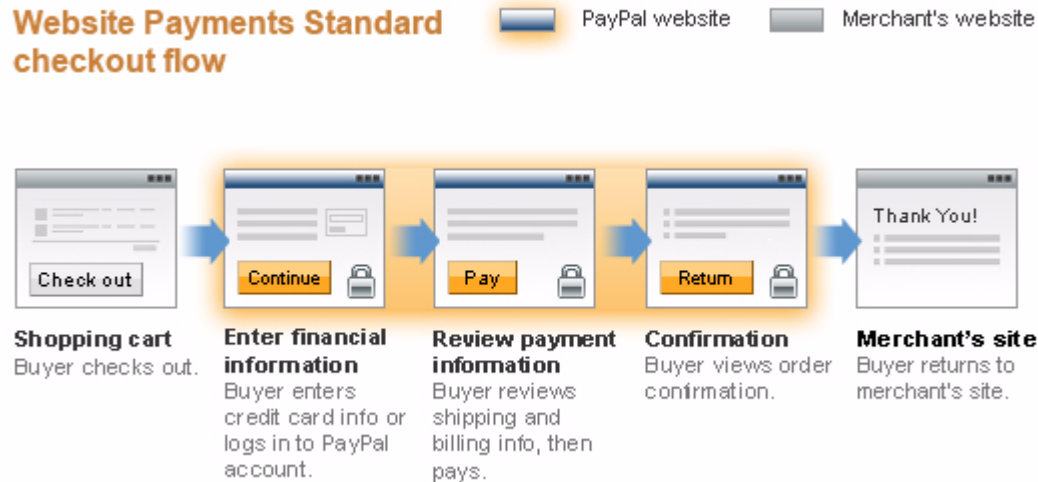
Enable Checkout from the Shopping Cart Page

- ☐ Optimize the buyer experience by enabling buyers to checkout directly from the merchant’s shopping cart page.
- ☐ Do not add pages or pop-ups between your shopping cart page and the first PayPal page.

- ☐ Do not add warnings or legal text in the checkout experience.

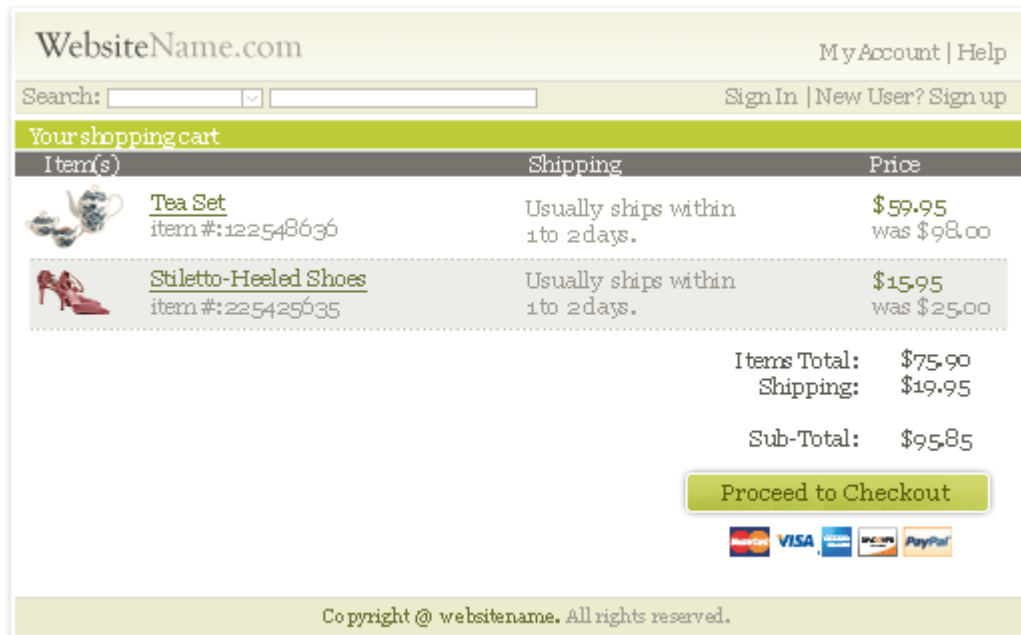
Checkout flow from merchants page

Website Payments Standard checkout flow



Shopping Cart Page Requirements


- ☐ Display a checkout button and enable buyers to immediately go to the PayPal-hosted payment pages to complete the checkout.
- ☐ Do not add potentially confusing text or images around the checkout button.
- ☐ List accepted payment options and display the corresponding logos: Visa, MasterCard, American Express, Discover, and PayPal.

Shopping cart page


WebsiteName.com My Account | Help






Search: Sign In | New User? Sign up

Your shopping cart

Item(s)	Shipping	Price
 <u>Tea Set</u> item #: 122548636	Usually ships within 1 to 2 days.	\$59.95 was \$98.00
 <u>Stiletto-Heeled Shoes</u> item #: 225425635	Usually ships within 1 to 2 days.	\$15.95 was \$25.00

Items Total: \$75.90
 Shipping: \$19.95
 Sub-Total: \$95.85

[Proceed to Checkout](#)

Copyright @ websitename. All rights reserved.

Implement “Buy Now” or “Add to Cart” Buttons (Hosting Providers Only)


Buy Now buttons allow customers to sell single items from their website. They are easy to implement and provide an excellent buyer experience. **Add to Cart** buttons provide an easy way to specify a button for each item that is for sale. This section describes the message and requirements for these buttons. These buttons only apply to hosting providers.

Buy Now button example

WebsiteName.com [My Account](#) | [Help](#)

Search: [Sign In](#) | [New User? Sign up](#)

Phones



V3 Silver

The new V3 Silver is expertly crafted to deliver exceptional performance. Ultra-thin design.

- Mobile instant messaging
- Integrated VGA digital camera

User Rating **4.06**


Item Price:	\$175.85
Shipping:	\$19.95
Sub-Total:	\$195.80

[**Buy Now**](#)

Copyright © websitename. All rights reserved.

Add to Cart button example

WebsiteName.com [My Account](#) | [Help](#)

Search: [Sign In](#) | [New User? Sign up](#)

Household appliances



English Tea Set

There's nothing ordinary about this tea set. It offers an authentic vintage pattern and has great thermal qualities to keep tea warmer and fresher for preserving taste longer.

Item Price:	\$37.99
Shipping:	\$9.95
Sub-Total:	\$47.94

[**Add to Cart**](#)

[**View Cart**](#)

Copyright © websitename. All rights reserved.

“Buy Now” and “Add to Cart” Messaging

Please use the following description when describing these buttons to your merchants.

- *Brief Description (31 words):* PayPal's “Buy Now” and “Add to Cart” buttons make it easy to turn your website into an online store. And your buyers don't need a PayPal account to pay you.

How it works

- Choose the right button for you:
 - To sell multiple items at once using the PayPal shopping cart, create “Add to Cart” buttons for each item in your store.
 - If you want to sell one item at a time, create a “Buy Now” button.
 - Or, if you are selling subscriptions or memberships, create a “Subscribe” button.
- Place the button(s) on your site using the HTML code provided.
- When customers want to buy from you, they click the button and pay by entering their credit card information on secure PayPal pages, and can promptly return to your site.
- Meanwhile, we process their transaction, and the money moves to your PayPal account where you can spend it, transfer it to your bank, or withdraw it from an ATM with the PayPal Debit MasterCard.

Additional Benefits for Buy Now and Add to Cart Buttons

PayPal strongly recommends that you make use of these PayPal benefit messages on your site :

- **Easy to set up**
 - No advanced programming skills required.
 - No shopping cart required – it's included with the service.
- **Easy to manage**
 - PayPal sends automatic order confirmation email messages to both you and your customers.
 - Get simple sales reports that you can export to QuickBooks or Microsoft Excel.
 - PayPal offers some of the industry's best automatic fraud screening technology.
- **Affordable**
 - You don't pay a thing until you get paid — no setup fees, monthly fees, or cancellation fees.
 - Low per-transaction fees typically range from 1.9% to 2.9% plus \$.30, depending on how much revenue you take in each month. The higher your volume, the lower your rate.

“Buy Now” and “Add to Cart” Button Requirements

Please implement the following requirements when using these buttons.

- ☐ Display the **Buy Now** or **Add to Cart** button below or to the right of the item.
- ☐ If the merchant is integrating the PayPal Cart, display the **View Cart** button on every page.
- ☐ Do not add text or images around the **Buy Now** or **Add to Cart** button.

Always Use Images Hosted by PayPal

To ensure a consistent PayPal experience from website to website, all PayPal images must be hosted on secure PayPal servers. That way, if PayPal updates its images, they will appear automatically on the merchant website.

The following table provides URLs to some of the U.S. English PayPal-hosted buttons:

Button	Description	URL
Buy Now	Primary	https://www.paypal.com/en_US/i/btn/btn_buynow_LG.gif
	With credit card logos	https://www.paypal.com/en_US/i/btn/btn_buynowCC_LG.gif
	Small	https://www.paypal.com/en_US/i/btn/btn_buynow_SM.gif
Pay Now	Primary	https://www.paypal.com/en_US/i/btn/btn_paynow_LG.gif
	With credit card logos	https://www.paypal.com/en_US/i/btn/btn_paynowCC_LG.gif
	Small	https://www.paypal.com/en_US/i/btn/btn_paynow_SM.gif
Add to Cart	Primary	https://www.paypal.com/en_US/i/btn/btn_cart_LG.gif
	Small	https://www.paypal.com/en_US/i/btn/btn_cart_SM.gif
View Cart	Primary	https://www.paypal.com/en_US/i/btn/btn_viewcart_LG.gif
	Small	https://www.paypal.com/en_US/i/btn/btn_viewcart_SM.gif
Donations	Primary	https://www.paypal.com/en_US/i/btn/btn_donate_LG.gif
	With credit card logos	https://www.paypal.com/en_US/i/btn/btn_donateCC_LG.gif
	Small	https://www.paypal.com/en_US/i/btn/btn_donate_SM.gif

If you want to get URLs for a button in other languages, please visit https://www.paypal.com/cgi-bin/webscr?cmd=_button-designer. Click on **Customize appearance** and then choose the desired language of the button. You can then copy the source code of the button shown on the right-hand side.

Implement Buyer Experience Requirements on PayPal Checkout Pages

This section describes the buyer experience requirements on the PayPal site. Follow these requirements to improve the buyer experience and increase cart conversion rates:

- ☐ [“Website Payments Standard – Payment Form” on page 22](#)
- ☐ [“Website Payments Standard – Payment Review Page” on page 24](#)
- ☐ [“Website Payments Standard – Payment Confirmation Page” on page 26](#)

Website Payments Standard – Payment Form

After the buyer clicks on the checkout button from the shopping cart page or selects credit cards or PayPal from the payment methods page, the buyer is redirected to PayPal.

The following illustration shows the PayPal checkout page with a billing form for buyers who do not have a PayPal account, and the PayPal login fields for buyers who have a PayPal account.

PayPal checkout page with billing form

1 WebsiteName.com

Description	Unit Price	Quantity	Amount
Toddler Boy's Diego - Size 6	\$15.95	<input type="text" value="1"/>	\$15.95 Remove
Powershot Camera	\$99.95	<input type="text" value="1"/>	\$99.95 Remove
Discount			-\$10.00
Item total:			\$105.90
Shipping and handling:			\$16.99
Total:			\$122.89 USD
<input type="button" value="Update Totals"/>			

Pay with Credit Card or Log In

[Learn more](#) about PayPal - the safer, easier way to pay.

Enter your billing information

Country:

Credit Card Number:

Payment Type:

VISA

MasterCard

Discover

AMERICAN EXPRESS

Expiration Date: / CSC: [What's this?](#)

First Name:

Last Name:

2 Billing Address Line 1:

Billing Address Line 2:

(optional)

City:

State:

ZIP Code:

Home Telephone:

555-555-1234

Email:

Review Order and Continue

3 Return to WebsiteName.com

PayPal. The safer, easier way to pay.
For more information, read our [User Agreement](#) and [Privacy Policy](#).

Already have a PayPal account?

Please log in

Email:

Password:

Forgot [email](#) or [password](#)?

Programming Requirements

- ☐ For (1) in previous graphic: Provide a URL to an image hosted on a secure server. The image should contain the merchant's company logo so that the buyer is assured that the PayPal checkout is associated with the merchant website.
- ☐ For (2) in previous graphic: If you collect shipping address information, use the address variables to send the address to PayPal. PayPal will use this to pre-populate the billing address fields. If the billing address is different than the shipping address, the buyer can change it.
- ☐ For (3) in previous graphic: Provide a return URL for buyers who choose to cancel payment.
- ☐ Integrate with the appropriate integration option using these general guidelines:
 - Cart partners should use the **Cart Upload** method of integration.
 - Hosting partners should use the **Buy Now** or PayPal cart integration.

For more information on how to use each of these options, visit

https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_html_Appx_websitestandard_htmlvariables

NOTE: You may also refer to the [Website Payments Standard Integration Guide](#) for more information.

Website Payments Standard – Payment Review Page

After logging into their PayPal account or completing the billing form, the buyer can review the payment and make changes to the payment method and shipping address.

Review payment page

WebsiteName.com

Review your payment

If the information below is correct, click **Pay Now** to complete your payment.

Description	Unit Price	Quantity	Amount
Toddler Boy's Diego - Size 6	\$15.95	1	\$15.95
Powershot Camera	\$99.95	1	\$99.95
Discount			-\$10.00

[Add special instructions to the seller](#)

Item total: \$105.90
Shipping and handling: \$16.99
Total: \$122.89 USD

Payment Method: Credit/Debit Card : Visa XXXX-XXXX-XXXX-8448 \$122.89 USD
This credit card transaction will appear on your bill as "WINGSAVIATT".
[Change](#)

Ship to: John Doe
123 New Street
San Jose, CA 95134
United States
[Change](#)

Contact Information: johndoe@yahoo.com

Pay Now

[Return to WebsiteName.com](#)

PayPal. The safer, easier way to pay.
For more information, read our [User Agreement](#) and [Privacy Policy](#).

Programming Requirements

- ❑ For (1) in previous graphic: Populate the variables for cart item details, quantities, and optional fields.
- ❑ For (2) in previous graphic: Populate the variables for item shipping, handling, tax, and discount amounts if you are calculating shipping, tax, or discounts before the buyer is transferred to the PayPal site.

NOTE: For more information, see the [Website Payments Standard Integration Guide](#).

Website Payments Standard – Payment Confirmation Page

After the buyer completes the payment, a payment confirmation page is displayed.

Payment confirmation page

WebsiteName.com

John, thank you for your payment

PayPal Secure Payments

Receipt ID: 5622-6018-4818-8399
An email with your order summary has been sent to johndoe@yahoo.com

YOUR ORDER IS BEING SHIPPED TO
123 New Street
San Jose, CA 95131
United States

MERCHANT CONTACT INFORMATION
WebSiteName.com
orders@websitename.com
904-981-6246

Return to Wings Aviation Service 1

[View Printable Receipt](#)

Save Your Information

Email Address: johndoe@yahoo.com

Create PayPal Password:
(8 characters minimum)

Confirm Password:

By clicking the button below, I agree with PayPal's [User Agreement](#) and [Privacy Policy](#)

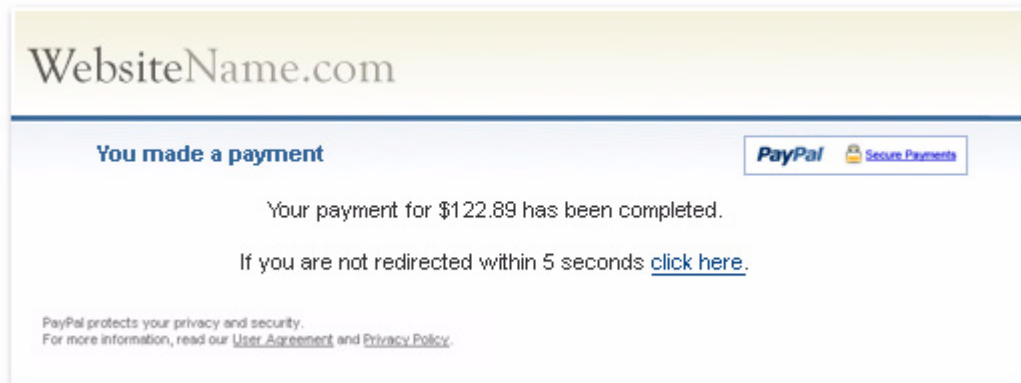
Create PayPal Account

[Site Feedback](#) W
PayPal. The safer, easier way to pay.
For more information, read our [User Agreement](#) and [Privacy Policy](#).

- ❑ For (1) in previous graphic: Provide PayPal with a URL to return to, so that the confirmation page can have a button that returns to the merchant's website.

If the buyer is a PayPal account holder, this page replaces the confirmation page, and the buyer is redirected to the merchant website.

Confirmation page replacement for PayPal account holder



Programming Requirements

- ☐ Use the `rm` variable and provide a URL on the merchant site that displays a “thank you for your payment” page.

NOTE: For more information, see the [Website Payments Standard Integration Guide](#).

Implement Instant Payment Notification (Recommended)

In order to deliver a better order processing experience to your merchants, you are **strongly encouraged** to implement Instant Payment Notification (IPN). IPN allows you to automate back-end operations such as order fulfillment, updating of databases with new customer orders, and sending confirmation emails. IPN provides your merchants with immediate notification and confirmation of payments processed by PayPal. With IPN, your merchant does not have to check email or log into PayPal for order notifications.

Your merchant can use IPN to:

- Automate order processing upon receipt of an IPN from PayPal
- Update their online inventory
- Send a digital product to the buyer
- Prevent fraudulent transactions by comparing the value of the goods purchased with the amount received. The PayPal IPN system posts the variables as they were originally submitted to PayPal, so a spoofed price will be reflected in the IPN postback from PayPal.

NOTE: For more information, see the [Order Management Integration Guide](#).

4

Express Checkout Requirements

Express Checkout enables merchants to accept PayPal payments in addition to credit cards. With Express Checkout, merchants can use the credit card processor of their choice, and receive the benefits of offering PayPal as an additional payment option.

There are three major areas of requirements and recommendations associated with Express Checkout. You must accomplish all three activities:

- ❑ “Integrate the Express Checkout API” on page 28
- ❑ “Integrate Front-end User Experience of Express Checkout” on page 28
- ❑ “Offer Express Checkout to Your Merchants” on page 41

The rest of this chapter describes these requirements in detail.

NOTE: For general information about Express Checkout, see https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_api_ECGettingStarted.

Integrate the Express Checkout API

If you are going to provide Express Checkout as an option to your merchants, you must integrate the Express Checkout API functionality necessary to process payments in your checkout flow. This is an extensive topic.

For more information about this topic, see the [Express Checkout Integration Guide](#), [Name-Value Pair Developer Guide](#), and [SOAP API Developer Reference](#).

NOTE: Please remember that you must submit the BN code with every transaction that you process with PayPal products.

Integrate Front-end User Experience of Express Checkout

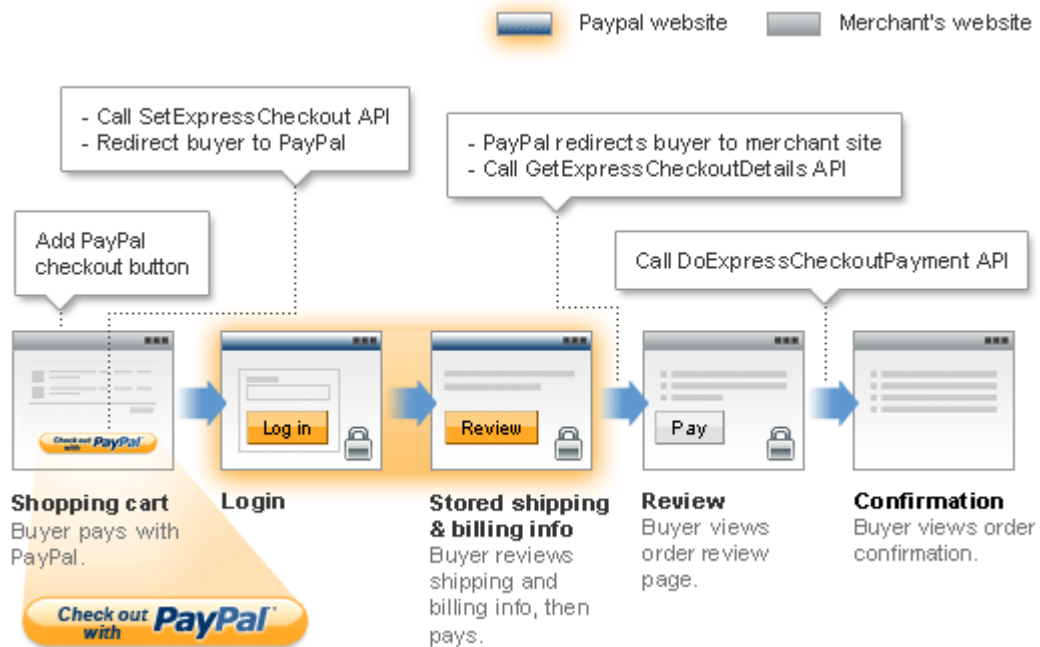
The following sections list implementation requirements associated with providing PayPal Express Checkout in your flow. For more information about this topic, see the [Express Checkout Integration Guide](#). The requirements cover topics such as:

- ❑ “Integrate Express Checkout Flow Requirements” on page 29
- ❑ “Display Order Details Requirements” on page 31
- ❑ “Optimize Your Checkout Flow with Instant Update API (Recommended)” on page 32
- ❑ “Integrate PayPal Express Checkout Button” on page 34

- ❑ “Place PayPal Acceptance Mark on Payment Methods Page” on page 37
- ❑ “Place Additional Options Banner on the Home Page and Product Details Page (Recommended)” on page 39

Integrate Express Checkout Flow Requirements

PayPal Express Checkout flow



You must meet the following checkout flow requirements:

- ❑ Do not add pages or pop-ups between your shopping cart page and the first PayPal page.
- ❑ Do not add pages or pop-ups between your payment methods page and the first PayPal page.
- ❑ Do not add warnings or legal text in the checkout experience.
- ❑ After the order review page, buyers must see one of two pages:
 - The final confirmation page, if a final confirmation is required.
 - The receipt page, when a final confirmation is not required. In this case, useraction must be set to commit.

NOTE: For additional information, see the [Express Checkout Integration Guide](#).

- ☐ If you want to display a receipt page rather than an order review page after returning from PayPal, send `useraction=commit` to PayPal, and include the final amount you will charge.

The button on the final PayPal page displays **Pay Now** rather than **Continue Checkout**, making it appear as if the checkout was completed on the PayPal site.

- ☐ Do not add a merchant login when the user returns from PayPal. If a store account page is shown, utilize a guest checkout option to streamline the PayPal customer through the process.

Programming Requirements

When the buyer clicks the PayPal Express Checkout button:

- ☐ Call `SetExpressCheckout` to initiate the transaction.
- ☐ After receiving the `SetExpressCheckout` response, redirect the buyer to PayPal.

NOTE: For more information, see the [Express Checkout Integration Guide](#), [Name-Value Pair Developer Guide and Reference](#), and [SOAP API Developer Reference](#).



Display Order Details Requirements

By passing the following additional parameters in the **SetExpressCheckout** request, the buyers are better informed throughout the checkout process and are more likely to complete the transaction.

- ☐ Pass the order, including critical checkout-relevant information, such as order details, shipping, tax and other fees, and price adjustments on the PayPal Review page.
- ☐ Use negative line items to display merchant promotions.

Example of passing in relevant line items and fees

WebsiteName.com

Review your information  

If the information below is correct, click **Continue**. You will confirm your payment on the next page.
[View PayPal policies](#) and your payment source rights.

Description	Unit Price	Quantity	Amount
10% Decaf Kona Blend Coffee Item # 623083 Size: 8.8-oz	\$9.95	2	\$19.90
Coffee Filter bags Item # 523083 Size: Two 24 piece boxes	\$39.70	2	\$79.40

[Add special instructions to merchant](#)

Item total:	\$99.30
Tax:	\$2.59
Shipping and handling:	\$8.00
Shipping discount:	-\$3.00
Insurance:	\$1.00
Total:	\$107.89 USD

[Enter gift certificate, reward, or discount](#)

Payment Method: Credit/Debit Card : Visa XXXX-XXXX-XXXX-2477
 This credit card transaction will appear on your bill as "SAMPLE TRANSACTION"
[Change](#)

Ship to: J. Doe
 2211 N Sixth St
 San Jose, CA 95434
 United States
[Change](#)

Contact Information: johndoe@yahoo.com
 408-555-7032

[Continue](#)

Cancel and return to [WebsiteName.com](#)

PayPal. The safer, easier way to pay.
 For more information, read our [User Agreement](#) and [Privacy Policy](#).

Optimize Your Checkout Flow with Instant Update API (Recommended)

For better checkout experience, PayPal **recommends** that you reduce the checkout flow length by integrating PayPal's Instant Update API.

Once integrated, you can pass shipping, insurance options and tax information to PayPal in real time, and it will be displayed on the Review page. You may reduce overall checkout flow length as a result.

To illustrate this concept more clearly, if your current checkout flow includes a step where the customer chooses shipping options or needs to review tax information, you can have these options and information presented on the PayPal site within the checkout flow. Then, the customer can complete these checkout steps and authorize payment all in one step, making it an easier and more tightly integrated flow.

- ☐ To eliminate redundant steps after integration, you should eliminate the options to select shipping and insurance from your flow.
- ☐ If there are no further user steps required in your checkout flow after users return from PayPal to your site, PayPal recommends that you to use the `useraction=commit` setting and pass in the final amount in the Set call, so that buyers can commit to the transaction on the PayPal Review Your Payment page, and include the final amount you will charge. Buyers will then be redirected back to the merchant's receipt page. This will further shorten the checkout flow.


With the Instant Update API feature, buyers will be able to make informed decisions earlier in the checkout flow, and buyers can also enjoy a shorter and easier experience. Better buyer experience will drive a higher checkout conversion rate.

You can control what options are presented to the buyer as the options can be instantly updated on the page.

NOTE: For more information read the [Instant Update API Guidelines](#).

Instant Update API streamlines user experience

WebsiteName.com

Review your information 

If the information below is correct, click **Continue**. You will confirm your payment on the next page.
[View PayPal policies](#) and your payment source rights.

Description	Unit Price	Quantity	Amount
10% Decaf Kona Blend Coffee Item # 623083 Size: 8.8-oz	\$9.95	2	\$19.90
Coffee Filter bags Item # 523083 Size: Two 24 piece boxes	\$39.70	2	\$79.40

[Add special instructions to merchant](#)

Item total:	\$99.30
Tax:	\$2.00
Shipping and handling:	\$10.00
UPS Express 2 Days \$10.00 USD	
UPS Next Day Air Freight \$20.00 USD	-\$3.00
UPS Express 2 Days \$10.00 USD	\$1.35
UPS Ground 2 to 7 Days \$9.99 USD	
Yes \$1.35 USD	
Total:	\$109.65 USD

[Enter gift certificate, reward, or discount](#)

Payment Method: Credit/Debit Card : Visa XXXX-XXXX-XXXX-2477
 This credit card transaction will appear on your bill as "SAMPLE TRANSACTION"
[Change](#)

Ship to: J. Doe
 2211 N Sixth St
 San Jose, CA 95434
 United States
[Change](#)

Contact Information: johndoe@yahoo.com
 408-555-7032

Continue

Cancel and return to [WebsiteName.com](#)

PayPal. The safer, easier way to pay.
 For more information, read our [User Agreement](#) and [Privacy Policy](#).

Integrate PayPal Express Checkout Button

Requirements associated with the PayPal Express Checkout button include using the right button graphic, and then making sure that the graphic is placed correctly on the pages and displayed in a way that is recognized by your customers.

Express Checkout Button Placement and Display Requirements

PayPal Express Checkout button



You must meet the following requirements:


- ☐ **On all pages that have a checkout button that is used to start the checkout process,** display the dynamic Express Checkout button right next to your usual checkout button. This requirement applies to shopping cart pages with a checkout button and, in some cases, product detail pages with a checkout button.
- ☐ You can choose a side-by-side or stacked (above or below) placement of the Express Checkout button with respect to your checkout button, as shown in the following images.

Side by side placement



WebsiteName.com My Account | Help

Search: Sign In | New User? Sign up

Your shopping cart

 -OR- [Proceed to Checkout](#)


The safer, easier way to pay

Item(s)	Shipping	Price
 <u>Tea Set</u> item #:122548636	Usually ships within 1 to 2 days.	\$59.95 was \$98.00
 <u>Stiletto-Heeled Shoes</u> item #:225425635	Usually ships within 1 to 2 days.	\$15.95 was \$25.00

Items Total: \$75.90

Shipping: \$19.95

Sub-Total: \$95.85

 -OR- [Proceed to Checkout](#)

The safer, easier way to pay


Copyright @ websiteName. All rights reserved.

Stacked placement

WebsiteName.com My Account | Help

Search: Sign In | New User? Sign up

Your shopping cart

Item(s)	Shipping	Price
 <u>Dinner Set</u> item #:122548636	Usually ships within 1 to 2 days.	\$59.95 was \$98.00
 <u>Toddler Boys' Diego</u> item #:225425635	Usually ships within 1 to 2 days.	\$15.95 was \$25.00

Items Total: \$175.85

Shipping: \$19.95

Sub-Total: \$195.80

[Proceed to Checkout](#)

-OR-



The safer, easier way to pay

Copyright @ websiteName. All rights reserved.

- ☐ Include the word “or” between your checkout button and the PayPal Express Checkout button (as shown in the previous images).
- ☐ Do not add text or images around the PayPal Checkout button.
- ☐ Display this button before the merchant website collects any billing or shipping details or displays any other payment methods.
- ☐ Do not display any hover-over text for the Express Checkout button.
- ☐ Make sure that the Express Checkout button is always active (can be clicked by the user).

Use the Dynamic Express Checkout Button

To ensure a consistent PayPal experience from website to website, all PayPal images must be hosted on secure PayPal servers. That way, if PayPal updates its images, they will appear automatically on the merchant website.

Dynamic images enable PayPal to change the appearance of the logo dynamically. If, for example, you have signed up to participate in a PayPal marketing campaign (such as free shipping when you use PayPal), PayPal can change the appearance of the image dynamically for the duration of that campaign based on parameter information you append to the image URL. By default, the Express Checkout image appears as the standard static image.

Static images cannot be changed dynamically. To participate in PayPal marketing promotions, you would have to manually update the image code to change the image displayed and restore the default image when the campaign is over. The only way you can automate image management is to replace static images in your implementation with dynamic images.

- For an introduction on how to set up the dynamic Express Checkout button go to the following URL: https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_api_ECButtonIntegration#id0872G0000YK
- A more complete description of this process can be found in the chapter on Button Integration in the [Express Checkout Integration Guide](#).
- Find the U.S. dynamic Express Checkout button at: https://fpdbs.paypal.com/dynamicimageweb?cmd=_dynamic-

Place PayPal Acceptance Mark on Payment Methods Page

You must display the PayPal Acceptance Mark near other payment options on the payment methods page. There are several requirements associated with the Acceptance Mark.

NOTE: Partners must offer merchants the following Acceptance Mark requirements as the “default” settings in the process. Merchants have the option to change these default settings.

Acceptance Mark Display and Placement Requirements

- ❑ To ensure a consistent PayPal experience from website to website, use images hosted on secure PayPal servers in accordance with the PayPal Usage Guidelines. That way, if PayPal updates its images, they will appear automatically on the merchant website.

HTML code for the dynamic PayPal acceptance marks is available from the PayPal Online Logo Center at <https://www.paypal.com/us/cgi-bin/webscr?cmd=xpt/cps/general/OnlineLogoCenter-outside>.

- ❑ Display PayPal on the payment methods page above other alternative payment options, credit cards, and other non-private label or merchant-branded payment options, as shown in the following figure.

Acceptance mark display example

The screenshot shows a website checkout page for 'WebsiteName.com'. The page includes a search bar, a shopping cart summary, shipping address, shipping methods, and payment options. The PayPal acceptance mark is highlighted with a blue bracket and a label 'Paypal Acceptance Mark'.


WebsiteName.com MyAccount | Help





Search: Sign In | New User? Sign up

Your shopping cart



Shipping Address	Shipping Method
John Smith 123 Main Street Mountain View, CA 94043 USA	<input checked="" type="radio"/> 1 Day Air via DHL (\$26.00) <input type="radio"/> 2 Day Air via DHL (\$16.00) <input type="radio"/> UPS Ground (\$6.00)

Payment Options

☒ PayPal 

☐ Credit/debit card    

Item(s) **Shipping** **Price**

 <u>Tea Set</u> item #:122548636	Usually ships within 1 to 2 days.	\$59.95 was \$98.00
 <u>Stiletto-Heeled Shoes</u> item #:225425635	Usually ships within 1 to 2 days.	\$15.95 was \$25.00

Items Total: \$75.90
 Shipping: \$19.95
 Sub-Total: \$95.85

[Confirm Order](#)

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- ❑ Add a **Learn More** link next to the PayPal acceptance mark to allow users to understand the value of PayPal. Use the following URL for this link: <https://www.paypal.com/au/cgi-bin/webscr?cmd=xpt/popup/OLCWhatIsPayPal-outside>

- ☐ Do not set credit card or any other payment options as the default payment method on the page.
- ☐ Hide credit card fields until the credit card radio button is selected; or, if you must show credit card fields, the fields should be dimmed until the credit card radio button is selected.
- ☐ On the payment methods page, use the placement sample (shown in the three following figures) that most closely resembles the way you display payment options on the merchant website.

Radio button – vertical alignment

Mountain view, CA 94043
USA ☐ UPS Ground (\$6.00)

Payment Options

☒ PayPal

☐ Credit/debit card

Item(s)	Shipping	Price
Tea Set	Usually ships within	\$59.95

Radio button – horizontal alignment

Mountain view, CA 94043
USA ☐ UPS Ground (\$6.00)

Payment Options

☒ PayPal ☐ Credit/debit card

Item(s)	Shipping	Price
Tea Set	Usually ships within	\$59.95

IMPORTANT: PayPal strongly recommends the use of radio buttons to display payment choices instead of a drop-down list. PayPal usability studies have shown that users prefer radio buttons because drop-down lists require an extra click and because drop-down list options are not initially visible.

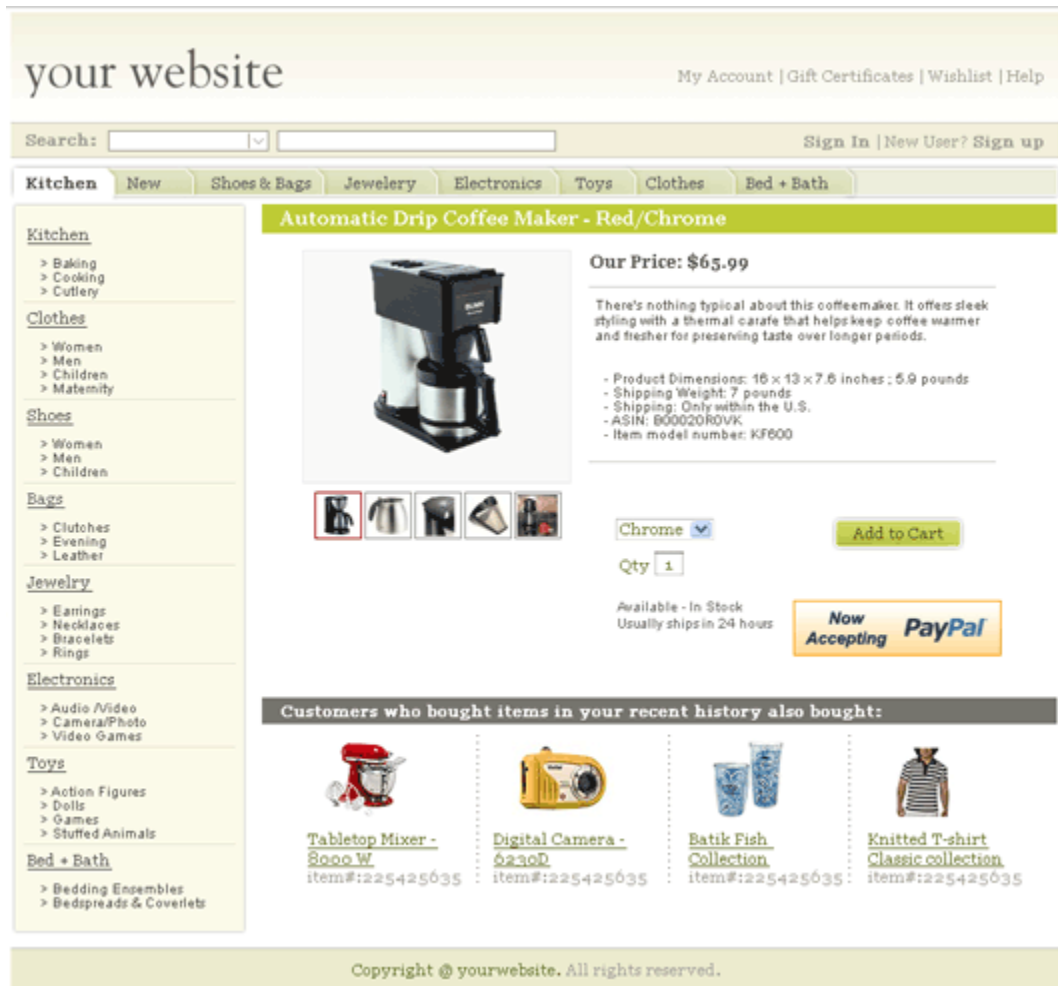
Place Additional Options Banner on the Home Page and Product Details Page (Recommended)

To offer your merchants an optimal checkout experience, display PayPal early and often in the flow. In particular, we strongly encourage you to implement the following recommendations:

- ☐ Place an options banner (for example, “Now accepting PayPal”) on your home page.
- ☐ Place an additional options banner (for example, “Now accepting PayPal”) outside the footer area and above the fold to get high visibility.

- ☐ Place “Now accepting PayPal” or another one of the Additional Options banners on the product details page, near the “Add to Cart” button.
- ☐ Encourage your merchants to put a footer image of PayPal along with other payment methods on their product details page.

“Now accepting PayPal” banner example



Always Use Images Hosted by PayPal

To ensure a consistent PayPal experience from website to website, use PayPal images that are hosted on secure PayPal servers in accordance with the PayPal Usage Guidelines. That way, if PayPal updates its images, they will appear automatically on the merchant website.

All PayPal banners should link to the “What is PayPal” content found at <https://www.paypal.com/au/cgi-bin/webscr?cmd=xpt/popup/OLCWhatIsPayPal-outside>

HTML code for Additional Options banners is available from the PayPal Online Logo Center at <https://www.paypal.com/us/cgi-bin/webscr?cmd=xpt/cps/general/AdditionalOptionsLogoCenter-outside>.

Offer Express Checkout to Your Merchants

Express Checkout allows merchants to accept PayPal payments with a faster and easier checkout experience, regardless of their credit card processor. It is a general requirement for you to provide Express Checkout to your merchants as a payment option.

The following sections describe the requirements and recommendations associated with offering Express Checkout to your merchants:

- ☐ [“Express Checkout Messaging” on page 41](#)
- ☐ [“Enable your Merchants to Turn On Express Checkout” on page 42](#)
- ☐ [“Enable Your Merchants to Configure Express Checkout” on page 43](#)

Express Checkout Messaging

To help you market Express Checkout to your merchants, we provide the following promotion text. Please choose from the following two options when describing Express Checkout to your merchants:

- *Option 1 (36 words plus footnote):* **PayPal: Proven to increase sales.** According to Jupiter Research, 23% of online shoppers like to pay with PayPal.* If you offer your visitors the choice to pay with PayPal, they may be more likely to buy.

* September 2007 Jupiter Research study of payment preferences online.

- *Option 2 (59 words plus footnotes):* **PayPal: Proven to increase sales.** If you currently accept credit cards online, offering PayPal as a payment option helps turn visitors into buyers. In fact, it's actually proven to increase sales.* According to a survey by Jupiter Research, 23% of online shoppers like to pay with PayPal.** Exactly why some of the world's top online retailers now accept PayPal.

* Applies to online businesses doing up to \$10 million/year in online sales. Based on a Q4 2007 survey of PayPal shoppers conducted by Northstar Research and PayPal internal data on Express Checkout transactions.

** September 2007 Jupiter Research study of payment preferences online.

PayPal also recommends that you use the following additional information:

Why shoppers like PayPal

- Online shoppers trust PayPal. They also like the convenience of not having to type their information into your site — it's already stored with PayPal, and we pass their payment and shipping details directly to you. Additionally, many online shoppers have money in their PayPal accounts: At any given time, PayPal accounts combined contain \$3 billion, and PayPal shoppers collectively spend that amount every two weeks.

Why businesses like PayPal

- **Seamless integration**
 - Integrates easily with your backend systems so you can automate fulfillment, track sales, and record orders in your database.
 - Detailed online reporting whenever you want it – monthly, weekly, even daily.
 - Downloadable logs are compatible with Intuit QuickBooks and Microsoft Excel.
- **Fraud protection**
 - Includes some of the industry's best automatic fraud screening technology, plus custom filters that you control.
 - Eligible transactions are covered against unauthorized payments, chargebacks, and reversals through PayPal's Seller Protection Policy.
- **Affordable pricing**
 - No setup fees, no monthly fees and no long-term contracts.
 - Low per-transaction fees, which typically range from 1.9% to 2.9% plus \$0.30, are probably comparable to what you'd pay to process credit cards elsewhere.

Enable your Merchants to Turn On Express Checkout

You must provide the following items to your merchants in your help section, FAQs, and other appropriate documentation about how to turn on Express Checkout:

- ☐ Provide the long description (Option 2, see [“Express Checkout Messaging” on page 41](#)) for Express Checkout and the additional benefits information of Express Checkout.
- ☐ Provide step-by-step instructions about how to navigate to the place where merchants can turn on Express Checkout on your site.
- ☐ Provide a link from your administration panel section to a page with the step-by-step instructions.

You must provide the following items to your merchants on the place where your merchants can turn on Express Checkout:

- ☐ Present Express Checkout as a selection on the processor configuration page or pages. Your merchant's choice of payment solution determines how you present the option:
 - If your merchant selects a non-PayPal credit card processor (including PayPal Payflow Pro Gateway), you must offer Express Checkout as an option.
 - If you integrate with PayPal using the third-party API model and your merchant selects a non-PayPal credit card processor, you must turn Express Checkout on by default.
 - If your merchant selects PayPal Website Payments Pro, your merchant *must* enable Express Checkout.
- ☐ Provide either a short description (Option 1) or a long description (Option 2) of Express Checkout (see [“Express Checkout Messaging” on page 41](#)) next to the option to turn it on, including legal disclaimers.

- ☐ Provide a **More** link to the additional benefits information about Express Checkout (see “Express Checkout Messaging” on page 41).
- Provide a **See demo** link to the Express Checkout demo. The URL to use for the demo is: http://www.paypal.com/en_US/m/demo/18077_ec.html
- Include the graphic with PayPal Express Checkout button next to the option to turn it on. Reference the graphic at this URL: http://www.paypal.com/en_US/i/btn/btn_xpressCheckout.gif

NOTE: Reference this image from the secure PayPal servers. That way, if PayPal updates the image, it will update automatically in your administration tool.

Enable Your Merchants to Configure Express Checkout

Once you allow your merchants to turn on Express Checkout, they must also be able to configure it. The configuration details depend on the type of API credentials that will be used. There are four different options for providing Express Checkout credentials. Each type of credential requires slightly different instructions and interface. The four types of credentials are:

- ☐ “Third-party API Permission Configuration Requirements” on page 44
- ☐ “API Certificate Configuration Requirements” on page 46
- ☐ “API Signature Configuration Requirements” on page 48
- ☐ “Offer Payflow Pro as a Payment Gateway” on page 58

Please review both the general requirements and recommendations that apply to all four of these options, as well as the specific requirements and recommendations that are specific to each option as described in their respective sections.

General Express Checkout Configuration Requirements and Recommendations

There are a set of general requirements that must be met no matter what type of integration mode is being used.

- ☐ In your help section, FAQs, and other appropriate documentation, provide step-by-step instructions about how to configure Express Checkout on your site and on PayPal, including navigation paths, values for partner-specific configuration fields, and fields for merchant-specific configuration details.
- ☐ On the page where your merchants can turn on Express Checkout, provide a link to a page with the instructions about how to configure Express Checkout.

There are a set of general recommendations about Express Checkout configuration regardless of the type of integration mode:

- ☐ On the page where your merchants provide PayPal-related configuration details, provide a sandbox mode in addition to a production mode. Provide radio buttons to switch between the two operational modes. When the corresponding mode is inactive, dim its related configuration fields.

- ❑ Before a merchant saves the configuration setting, provide a page to confirm configuration, where your merchant can review or modify Express Checkout acceptance, operational mode, and other configuration details such as their PayPal email address.

Third-party API Permission Configuration Requirements

In the third-party API permissions integration mode, you make the API calls to PayPal on your merchants' behalf using your own API credentials.

Sample Configuration page for API Permissions option

The screenshot shows a web interface for 'ShoppingCartProvider'. At the top, there's a navigation bar with 'Sales', 'Inventory', 'Payments' (selected), 'Site Settings', and 'Help'. A 'Log out' link is in the top right. Below the navigation bar, a breadcrumb trail reads 'Home > Operations > Control Panel > Payments >'. The main heading is 'Processor Configuration', followed by the text 'You can configure the processor to accept credit card transactions from your customers.' There are two input fields: 'Username' and 'Transaction Key'. Below these is a yellow box titled 'Accept PayPal Express Checkout' with a checked checkbox. Inside this box, there's a PayPal logo with the text 'Check out with PayPal' and 'The safer, easier way to pay'. Below the logo, it says 'PayPal: Proven to Increase Sales. According to Jupiter Research, 23% of online shoppers like to pay with PayPal.* If you offer your visitors the choice to pay with PayPal, they will be more likely to buy.' and '*September 2007 Jupiter Research study of payment preferences online.' There are two links: 'See Demo' and 'Simple Setup'. Below this, there are two radio button options: 'Production Mode' (selected) and 'Sandbox Mode'. Each has an associated input field for 'E-mail address to receive PayPal payment:', both containing 'johndoe@yahoo.com'. At the bottom of the yellow box are 'Save and Continue' and 'Cancel' buttons. At the very bottom of the page, it says 'Copyright 1996 - 2009. All rights reserved.'

You are required to do the following things:

- ❑ Implement Accelerated Boarding for Express Checkout so that your merchants can accept payments before setting up their PayPal account. Refer to the Accelerated Boarding Integration Guide for details, which can be found at:
https://cms.paypal.com/cms_content/US/en_US/files/developer/PP_AcceleratedBoarding_Guide.pdf

- ❑ In your help section, FAQs, and other appropriate documentation, provide step-by-step instructions about how to configure Express Checkout before receiving payments:
 - Instruct your merchants on how to navigate to your administration panel page where the merchant can configure Express Checkout.
 - Provide a link to information about how to grant third-party API permissions at PayPal. The URL to use for this link is: https://www.paypal.com/IntegrationCenter/ic_api-thirdparty.html

IMPORTANT: Provide links to API permissions instructions rather than provide instructions on your site, because PayPal revises the way users configure API permissions from time to time. By linking to instructions hosted by PayPal, you ensure that the instructions will always be up to date.

- Specify your PayPal API account username for the **API account username** field.
 - Instruct your merchants to select **Express Checkout** in your API access level section.
- ❑ In your help section, FAQs, and other appropriate documentation, provide step-by-step instructions on how to configure Express Checkout after receiving payments, including:
 - How to navigate to the place where your merchant configures Express Checkout at your Administration Panel section.
 - How to complete setup at PayPal. Please ask your PayPal Integration Manager or Merchant Technical Support to provide the step-by-step instructions named “Setting up PayPal Express Checkout with Accelerated Boarding.”

NOTE: Your merchants can set up Express Checkout at PayPal either before or after receiving payments. They do not need to do both.

- ❑ On the page where your merchants configure Express Checkout, provide a field for the email address where your merchant will receive PayPal payments from customers, and pre-populate that field with your merchant’s email address. Allow your merchant to edit this email address as necessary. To receive payment to a PayPal account that they already have, your merchant must provide the email address of that account.
- ❑ After your merchant completes the configuration, remind them to sign up for a PayPal Business account, either on the complete configuration page or in an email message. Configuring Express Checkout at PayPal before receiving payments allows your merchants to further customize their customer experience; for example, adding a company logo on the PayPal review page.

API Certificate Configuration Requirements

The API certificate integration mode is used when your merchants use their own PayPal API certificate and their own API credentials.

Sample Configuration page for API Certificate option

The screenshot shows the 'ShoppingCartProvider' control panel. The top navigation bar includes 'Sales', 'Inventory', 'Payments' (selected), 'Site Settings', and 'Help'. A 'Log out' link is in the top right. The breadcrumb trail is 'Home > Operations > Control Panel > Payments >'. The section is titled 'Processor Configuration' with the instruction: 'You can configure the processor to accept credit card transactions from your customers.' Below this are input fields for 'Username' and 'Transaction Key'. A large yellow box contains the 'Accept PayPal Express Checkout' section. It starts with an unchecked checkbox and a 'Check out with PayPal' button. Text describes the benefits of PayPal and includes a reference to a 2007 Jupiter Research study. Below this are two radio buttons: 'Production Mode' (selected) and 'Sandbox Mode'. Each mode has input fields for 'API Username', 'API Password', and 'API Certificate', with a 'Browse...' button next to the certificate field. At the bottom of the yellow box are 'Save and Continue' and 'Cancel' buttons. The footer states 'Copyright 1996 - 2009. All rights reserved.'

You are required to implement the following items:

- ☐ In your help section, FAQs, and other appropriate documentation, provide step-by-step instructions about how to configure Express Checkout, including:
 - Provide a link to instructions about requesting an API certificate from PayPal. The URL to use for this link is: https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/apicertificates

IMPORTANT: It is important that you provide links to PayPal's API Certificate instructions rather than provide instructions on your site, because PayPal revises the way users configure API credentials from time to time. By linking to instructions hosted by PayPal, you ensure that the instructions will always be up to date.

- Instruct your merchants on how to navigate to your administration panel page where they can configure Express Checkout, and provide instructions about how to complete the setup.
- On the page where your merchants configure Express Checkout, provide the following three fields to collect API credential information from your merchant:

API Signature Configuration Requirements

The API Signature mode is used when your merchants use their own PayPal API signatures and their own API credentials.

Sample Configuration page for API Signature option

The screenshot shows a web interface for 'ShoppingCartProvider'. At the top, there's a navigation bar with links for 'Sales', 'Inventory', 'Payments', 'Site Settings', and 'Help'. A 'Log out' link is in the top right. Below the navigation bar, a breadcrumb trail reads 'Home > Operations > Control Panel > Payments >'. The main section is titled 'Processor Configuration' and contains a description: 'You can configure the processor to accept credit card transactions from your customers.' Below this are input fields for 'Username' and 'Transaction Key'. A large yellow box contains the 'Accept PayPal Express Checkout' section. It starts with a checkbox and a 'PayPal' logo. Text inside the box states: 'PayPal: Proven to Increase Sales. According to Jupiter Research, 23% of online shoppers like to pay with PayPal.* If you offer your visitors the choice to pay with PayPal, they will be more likely to buy.' A footnote mentions '*September 2007 Jupiter Research study of payment preferences online.' and provides links for 'See Demo' and 'Setup'. There are two radio button options: 'Production Mode' (selected) and 'Sandbox Mode'. Each mode has three input fields: 'API Username', 'API Password', and 'API Signature'. The 'Production Mode' fields contain 'USER_API_DOMAIN.COM', 'P4ssw0rd', and 'a318gh579mh43rt09fan1' respectively. The 'Sandbox Mode' fields contain 'TEST_API_DOMAIN.COM', 'P4ssw0rd', and 'a318gh579mh43rt09fan1' respectively. At the bottom of the yellow box are 'Save and Continue' and 'Cancel' buttons. The footer of the page reads 'Copyright 1996 - 2009. All rights reserved.'

You are required to implement the following items:

- ☐ In your help section, FAQs, and other appropriate documentation, provide step-by-step instructions on how to configure Express Checkout, including:

- Provide a link to instructions about requesting an API signature from PayPal. The URL to use for this link is: https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_api_NVPAPIBasics#id084E30I30RO

IMPORTANT: Provide links to PayPal’s API signature instructions rather than provide instructions on your site, because PayPal revises the way users configure API signatures from time to time. By linking to instructions hosted by PayPal, you ensure that the instructions will always be up to date.

- Instruct your merchants on how to navigate to your administration panel page where they can configure Express Checkout and provide instructions about how to complete the setup.
- On the page where your merchants configure Express Checkout, provide the following three fields to collect API signature information from your merchant.

5

Transaction Management

Integrating PayPal into Your Back Office (recommended)

PayPal recommends that you provide transaction management capability for your merchants to perform post-checkout operations such as delayed capture and refund. Features of such a management capability are described below:

- Provide a summary page that lists all transactions. Provide search capability for merchants to identify a transaction with specific attributes.
- After your merchant selects a transaction on the summary page, display details about the transaction.
- Depending on the type of transaction, your merchant can perform certain post-checkout operations, as indicated in the following table.

TABLE 5.1 *Valid post-checkout operations based upon transaction type*

Transaction Type	Post-Checkout Operation					Reference Transaction*
	Authorization	Re-authorization	Capture	Void	Refund	
Order	Yes	No	Yes	Yes	No	No
Authorization	No	Yes #	Yes	Yes	No	No
Sale	No	No	No	No	Yes	Yes*
Capture	No	No	No	No	Yes	Yes*

Re-authorisation does not work for authorizations that are generated from orders.

* Reference Transaction only works for merchants eligible for this feature.

- Depending on the post-checkout operation selected, allow your merchants to enter an amount and a note to their customer.

Transaction management summary, detail, and management pages