

## How to activate PayPal to work with Tradebox Cash Manager.

### STEP 1

**Adjust the settings in your PayPal account to work with Tradebox Cash Manager.**

(i) Log in to your PayPal account.



(ii) Once you have logged in select **Profile** from the options under **My Account**.



What's New

- Learn about important updates to Recent Activity
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- Security Tips
- Policy Updates
- 14 March 2008

**My Account Overview**

Welcome, **Mr Test** (someone@somewhere.com) [Edit profile](#)

Business Name: **Mr Test's Test Store**

Account holder since 2008

Account type: Business

Status: **UK - Verified (New)**

PayPal balance		<a href="#">View Limits</a>   <a href="#">Manage Currency</a>
Currency	Balance	
British Pound (Primary):	£200.00 GBP	
Euro:	€0.00 EUR	
<b>Current Total in GBP:</b>	<b>£200.00 GBP</b>	



(iii) Select the tab under **Account Information** on the far left hand side of the page called **API Access**.

The screenshot shows the 'Profile Summary' page with three columns of links: Account Information, Financial Information, and Selling Preferences. The 'API Access' link in the Account Information column is highlighted with a mouse cursor.

Account Information	Financial Information	Selling Preferences
<a href="#">Email</a>	<a href="#">Credit/Debit Cards</a>	<a href="#">Value Added Tax</a>
<a href="#">Postal Address</a>	<a href="#">Bank Accounts</a>	<a href="#">Postage Calculations</a>
<a href="#">Password</a>	<a href="#">Currency Balances</a>	<a href="#">Payment Receiving Preferences</a>
<a href="#">Notifications</a>	<a href="#">Gifts and Discounts</a>	<a href="#">Instant Payment Notification Preferences</a>
<a href="#">Time Zone</a>	<a href="#">Recurring Payments</a>	<a href="#">Reputation</a>
<a href="#">Multi-User Access</a>	<a href="#">Pay List</a>	<a href="#">Customer Service Message</a>
<b><a href="#">API Access</a></b>		<a href="#">Website Payment Preferences</a>
<a href="#">Remove Merchant Permissions</a>		<a href="#">Encrypted Payment Settings</a>
<a href="#">Business Information</a>		<a href="#">Custom Payment Pages</a>
		<a href="#">Invoice Templates</a>
		<a href="#">Language Encoding</a>

(iv) Select the option to **Request API Credentials** in the right hand box.

The screenshot shows the 'Setting up PayPal API Credentials and Permissions' page. It contains two boxes with options to grant API permission or request API credentials. A link to learn more about PayPal API concepts is also present.

[Grant API Permission](#) to your shopping cart or solution provider if the cart will make API calls on your behalf.

[Request API Credentials](#) to create an API username and password for either your preintegrated shopping cart or a custom solution that you are developing.

[Learn more about PayPal API concepts and terminology](#)



(v) Select the option to **Request API Signature** in the left hand box then select the **Agree and Submit** button.

My Account | Send Money | Request Money | Merchant Services | Auction Tools | Products & Services

### Request API Credentials [Back to Profile Summary](#)

API credentials consist of three elements:

- An API username
- An API password
- Either an API signature or an API SSL client-side certificate

If you're using a shopping cart or solution provider, ask whether you need an API signature or a certificate.

<input checked="" type="radio"/> <b>Request API signature</b> if your shopping cart or solution provider has asked for an API username, password and signature, or if you're developing a custom shopping cart.	<input type="radio"/> <b>Request API certificate</b> if your shopping cart or solution provider requires a file-based certificate.
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Need help deciding which credential is right for your needs? [Learn more](#)

By clicking **Agree and Submit**, I agree to the [API Licence Agreement and Terms of Use](#).

(vi) The next page will provide you with your PayPal:

- API Username
- API Password
- Signature

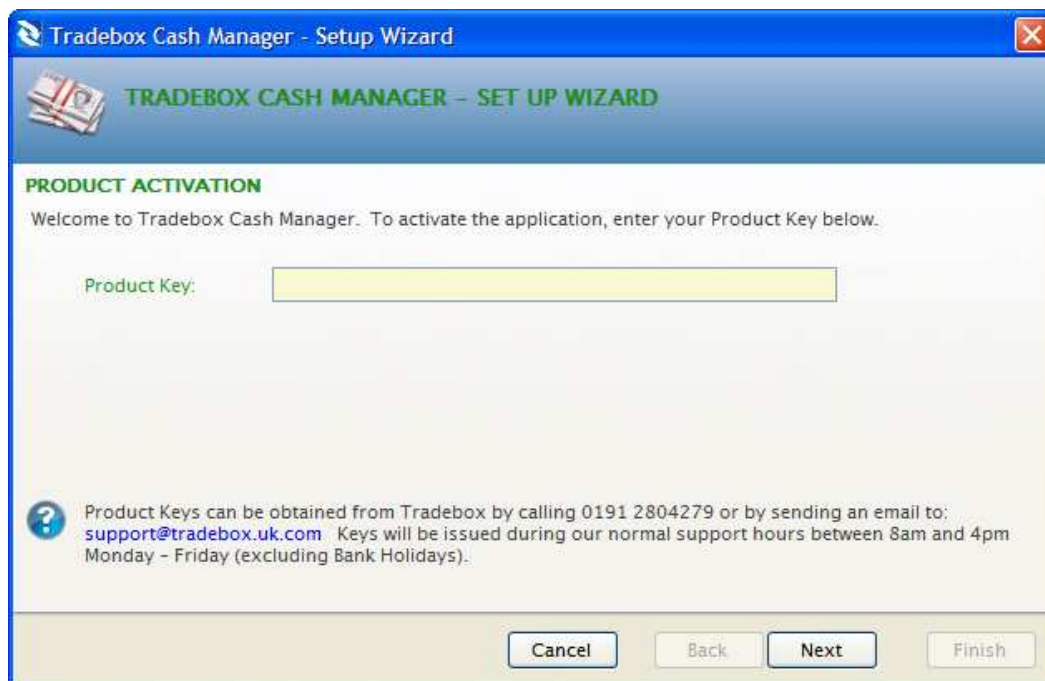
Take a copy of these credentials.



## STEP 2

### **Establish Settings in Tradebox Cash Manager.**

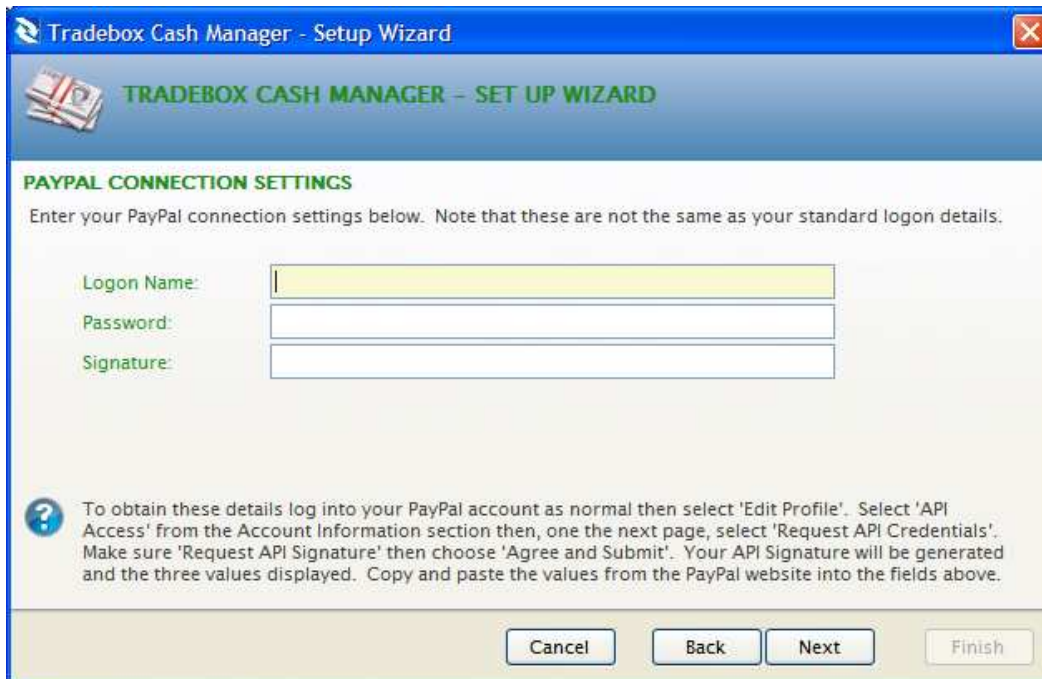
- (i) Open Cash Manager by selecting **Start – Programs – Tradebox – Tradebox Cash Manager**.
  
- (ii) In the **Product Activation** page from the **Set Up Wizard** enter the **Product Key** provided by Tradebox.



Then select **Next**.

(iii) In the **PayPal Connection Settings** page from the **Set Up Wizard** copy the **PayPal credentials** into the relevant boxes as follows:

- API Username = Logon Name
- API Password = Password
- Signature = Signature



The screenshot shows a window titled "Tradebox Cash Manager - Setup Wizard". The main heading is "TRADEBOX CASH MANAGER - SET UP WIZARD". Below this is the section "PAYPAL CONNECTION SETTINGS". A note reads: "Enter your PayPal connection settings below. Note that these are not the same as your standard logon details." There are three input fields: "Logon Name:", "Password:", and "Signature:". At the bottom, there are four buttons: "Cancel", "Back", "Next", and "Finish". A help icon with a question mark is located to the left of a detailed instruction paragraph.

**PAYPAL CONNECTION SETTINGS**

Enter your PayPal connection settings below. Note that these are not the same as your standard logon details.

Logon Name:

Password:

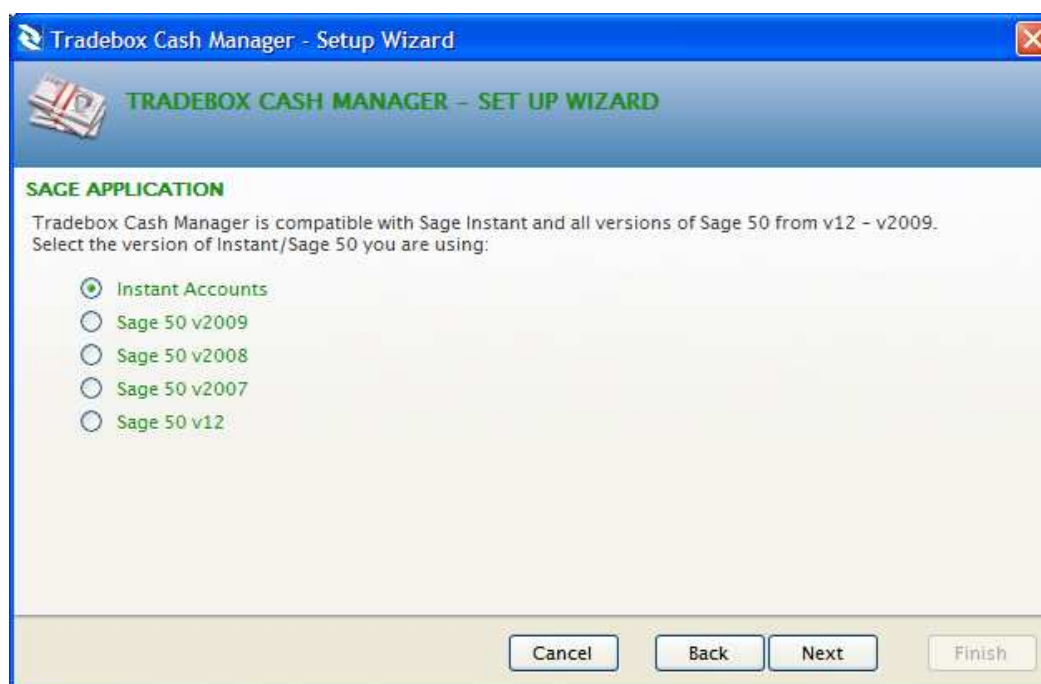
Signature:

**?** To obtain these details log into your PayPal account as normal then select 'Edit Profile'. Select 'API Access' from the Account Information section then, on the next page, select 'Request API Credentials'. Make sure 'Request API Signature' then choose 'Agree and Submit'. Your API Signature will be generated and the three values displayed. Copy and paste the values from the PayPal website into the fields above.

Cancel Back Next Finish

Then select **Next**.

- (iv) In the **Sage Application** page from the **Set Up Wizard** select which Sage accountancy solution you wish to post PayPal transactions to.



Then select **Next**.



- (v) In the **Receipts, Payments & Fees** page select which **nominal codes** and **bank accounts** in Sage you wish to post your receipts, fees and payments against.

The screenshot shows a software window titled "Tradebox Cash Manager - Setup Wizard". The main heading is "TRADEBOX CASH MANAGER - SET UP WIZARD". Below this, the section is titled "RECEIPTS, PAYMENTS & FEES". The instruction reads: "Select the Sage accounts/settings you want to use for posting Receipts, Payments and Fees into Sage:". The form contains the following fields:

Receipt Bank:	1200	Payment Bank:	1200
Receipt Nominal:	4000	Payment Nominal:	5000
Receipt Dept.:	0	Payment Dept.:	0
Receipt Details:	Item Details	Payment Details:	Item Details
Fees Bank:	1200		
Fees Nominal:	7901		
Fees Dept.:	0		

At the bottom of the window, there are four buttons: "Cancel", "Back", "Next", and "Finish".

Then select **Next**.

- (vi) In the **Tax Codes & Rates** page establish the Sage **Tax Codes** and applicable **VAT rates** for UK, EU and Rest of World sales, purchases and fees.

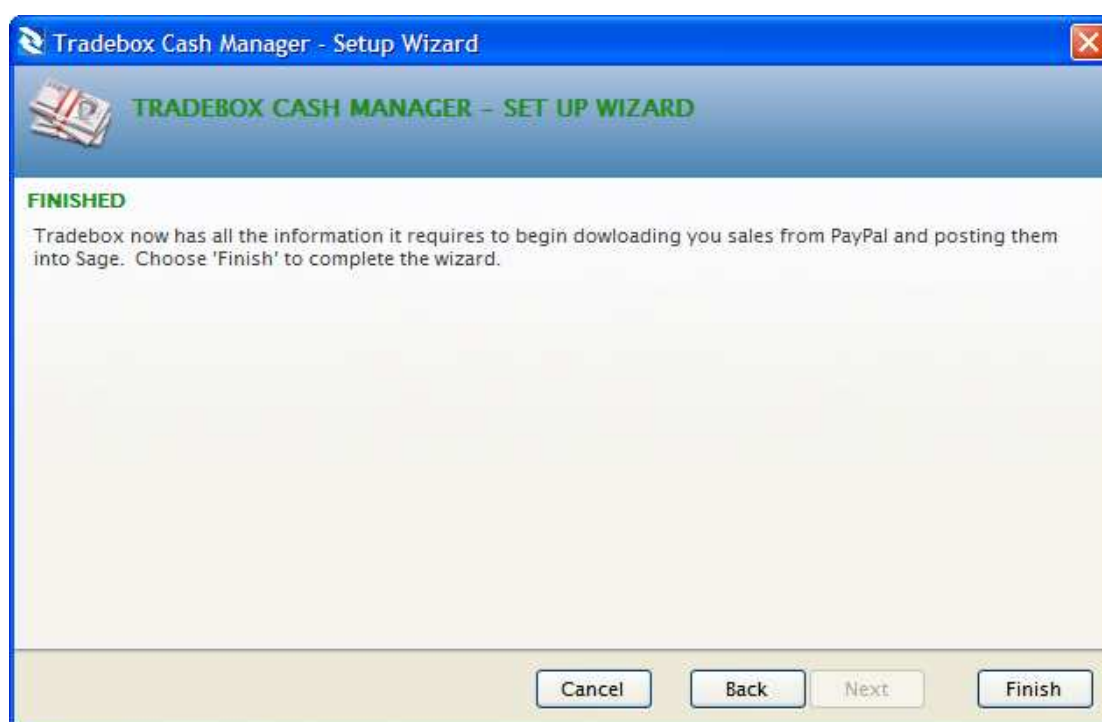


Label	Code	Rate
UK Sales Code:	T1	15.00
EU Sales Code:	T1	15.00
ROW Sales Code:	T0	0.00
UK Purchase Code:	T1	15.00
EU Purchase Code:	T1	15.00
ROW Purchase Code:	T0	0.00
Fees Code:	T9	

Then select **Next**.



(v) Complete the Set Up Wizard by selecting Finish.



You are now ready to start downloading Transactions from PayPal into Tradebox Cash Manager.