Step 1: Generate PayPal API Credentials

To enable the Printer's Plan integration with Paypal you will need to generate API Credentials for your Paypal account. The following link outlines how to create these credentials:

https://www.paypal.com/us/smarthelp/article/How-do-I-create-REST-API-credentials-ts1949

Step 2: Configure Printer's Plan

After you generate the credentials, in Printer's Plan go to the **Settings** tab, open the **Third Party Integrations** folder and select **Paypal**.

In the PayPal Settings window you will need to fill in the following fields:

Enable Test Mode (Sandbox Mode)

> You can run the PayPal integration in a test mode, to do this, check-in the **Enable Test Mode** option. This will prevent live invoices from being created on the PayPal site. Additionally, if you are using the PayPal Delivery method, emails will not be sent to the customer

> Uncheck this option to run the integration in **Live** mode.

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Rest API Client ID (Required)

      In this field enter the Rest API Client ID created in Step 1 of this document.

Rest API Client Secret (Required)

      In this field enter the Rest API Client Secret created in Step 1 of this document.

Merchant Email Address (Required)

      Enter the email address that is linked to your PayPal account.

Merchant First Name, Last Name (Required)
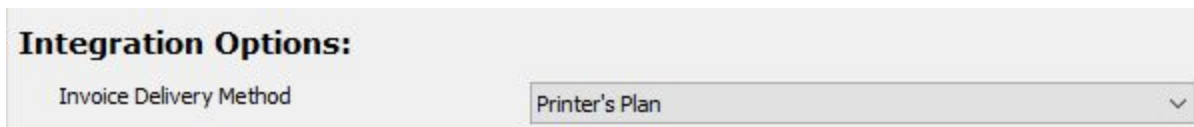
      Enter the name that you would like to appear at the top of the PayPal invoice.

Logo URL (Optional)

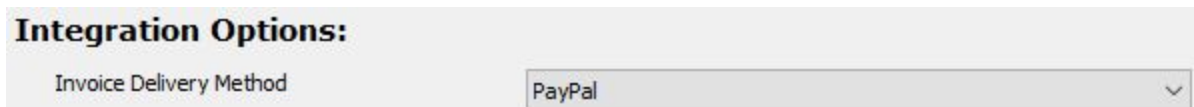   Enter the URL address of your company logo image file, this logo must use an HTTPS address.

Invoice Delivery Method (Required)

To send email notification via Printer's Plan set the **Invoice Delivery Method** field to Printer's Plan:

To send email notification via PayPal set the **Invoice Delivery Method** field to PayPal:

Webhook ID and Payment Type

If you are running the Printer's Plan API (Web2Plan), or PlanWeb solution, payments entered online can automatically be recorded in Printer's Plan. For this to work your Web2Plan/PlanWeb solution will need to have an SSL Certificate and you will need to create a Webhook ID.

If you are not running these solutions, invoices paid online will have to be manually entered into Printer's Plan.

To enable the payment integration you will need to create a **Webhook ID**, this is done on the PayPal Developer site for your PayPal business account: https://developer.paypal.com

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When you log in to the developer account go to the **PayPal DashBoard** and select **My Apps & Credentials**. In this window, under the **REST API apps** section, you should see the app created in Step 1 of this document.

Click on the App, and on the next page click the **Add Webhook** button. In the **Webhook Url** field enter the address of the PayPalListener. It should look similar to the following with your domain replacing the "mywebsite.com" portion:

After entering the Url, under the **Event types** section, check in the **Invoicing invoice paid** option:

Click the **Save** button to save these changes and a **Webhook ID** will be generated:

Enter this Webhook ID in the Printer's Plan **PayPal Settings** window.

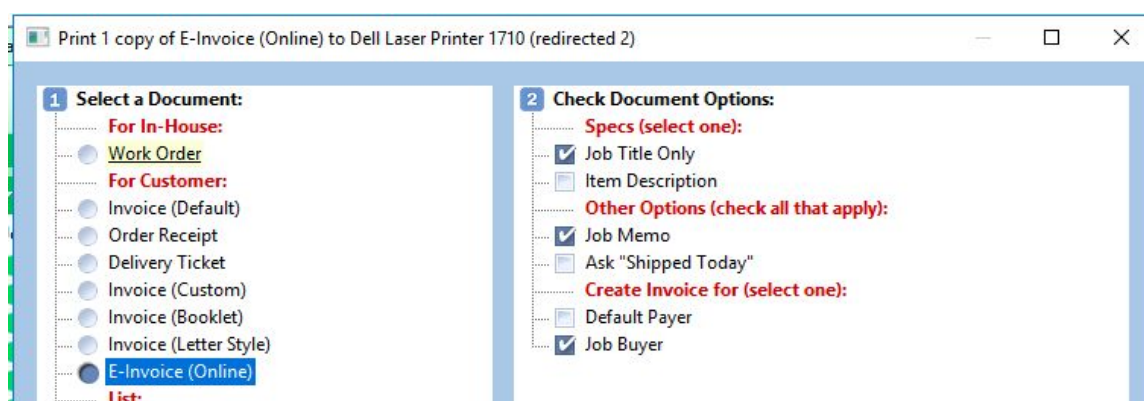---

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All payments sent from PayPal to Printer's Plan will be classified with the same payment type. In the Printer's Plan **PayPal Settings** window, in the **Payment Type** field select the default payment type:

Payment Type	Paypal	⌄

Please note, you can create payment types in the **Settings | Accounting | Payment Types** window.

Step 3: Creating a PayPal Invoice and Notifying the Customer.

In Printer's Plan, when a job is complete, open the order and click the Print button. In the Print window select the option **E-Invoice (PayPal)**.

On the right side of the Print window you can select the document options. The selections in this window will determine which data is populated on the Paypal version of the invoice. You can set defaults for these options in in the **Settings | Printing | Document** options window.

It is important to note that these options are only used when you initially send the invoice to PayPal. Any changes made to the job in Printer's Plan will not be automatically updated on PayPal. Instead you would have to manually edit the invoice on your PayPal site.
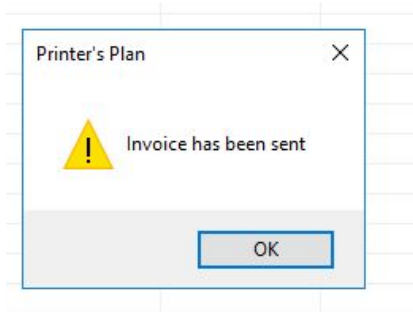
For the '**Create Invoice for (select one)'** document option, this selection determines the name that will be inserted in the **Bill To** portion of the PayPal invoice. Once the job has been sent to Paypal this selection cannot be changed.

Once the options are set click the **Send** button to generate the Invoice online.
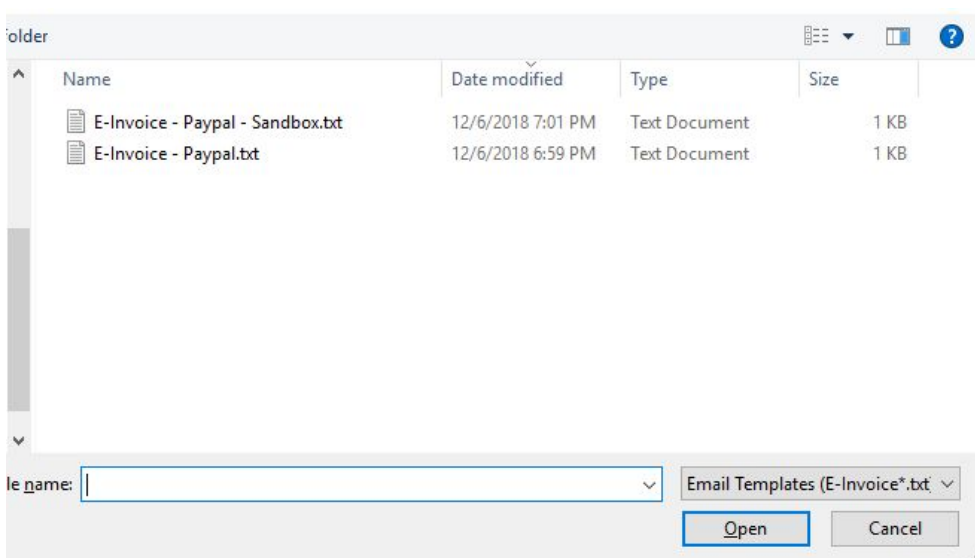

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After clicking the **Send** button, if you are using the **PayPal Delivery Method**, the **Create Invoice for (select one)** selection will determine the email address that will be sent the email notification. This email will be automatically sent from PayPal and Printer's Plan will display a successful **Invoice has been sent** alert message.

If you are using the **Printer's Plan Delivery Method**, after clicking the **Send** button an **Options** window will appear allowing you to select the contact that will receive the email notification:
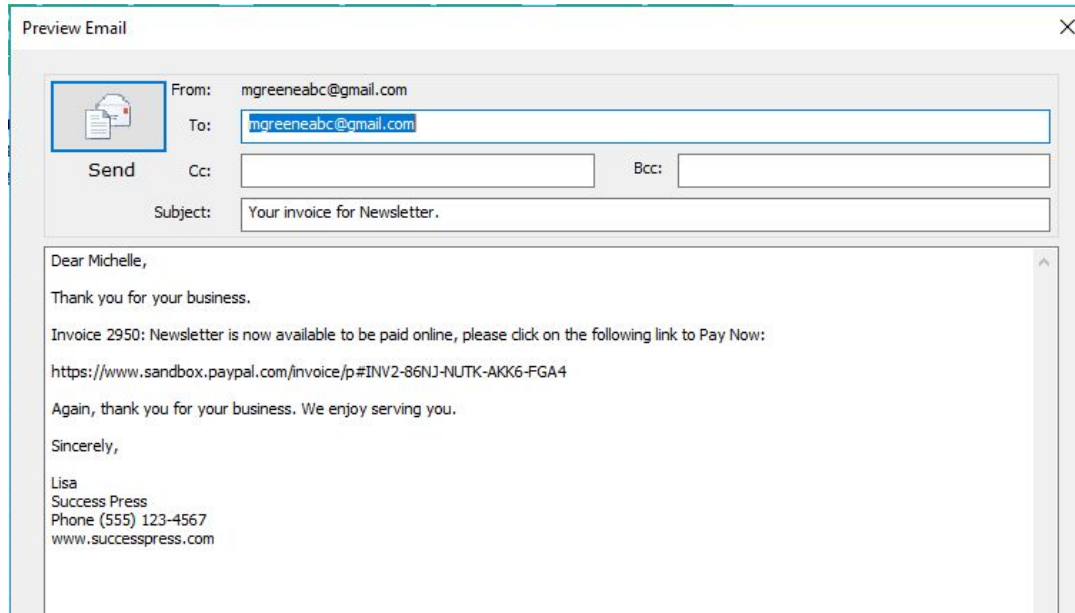

Next, a window will open allowing you to select a template that will populate the body of the email message.
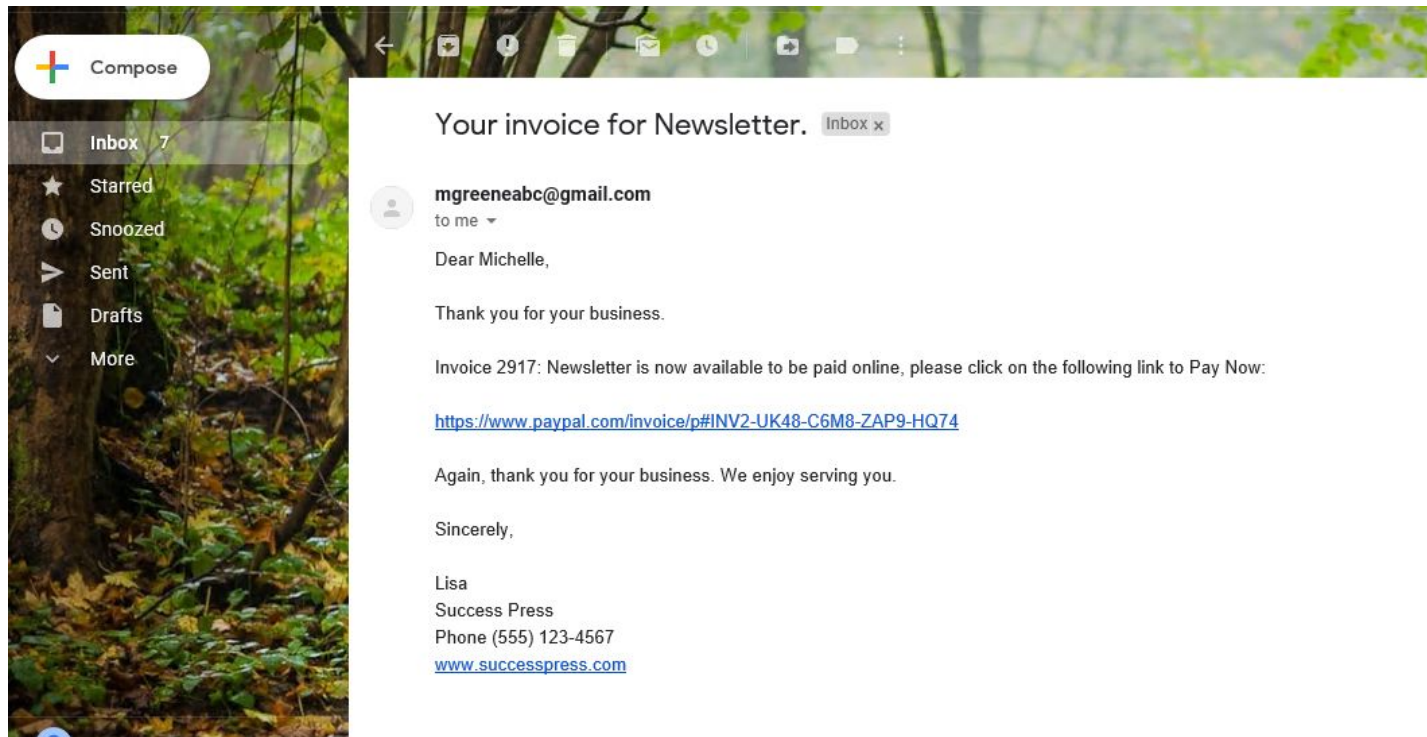
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These template files are stored in the Email folder where your database is located. You can customize and create additional template files in this folder. After selecting a template an email message will appear:

When you click the Send button the email will be sent to the customer:

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When the customer clicks on the **Pay Now** link on the email they will be taken to the PayPal site where they can pay for the invoice using any major credit card or their PayPal account.

When the client pays the invoice you will be sent an email notification, and if you are running the Printer's Plan API (Web2Plan) or customer facing website (PlanWeb) solution, the payment will automatically be recorded in Printer's Plan.