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Overview

This article is for the customers who've decided to go with **PayPal Payments Pro** as the <u>merchant gateway</u> option to use with **Trail Blazer** for processing money (contributions, and event ticket/product sales).

It walks through the steps on how to generate your <u>PayPal Payments Pro</u> **API Username**, **Password**, and **Signature**, and from there how to plug that information into your database.

Many of the steps this article references comes from PayPal's help resources in regards to the generation of the API credentials. The related resources at the bottom contain other relevant topics regarding the processing of money.



Tip: Call or email **PayPal Payments Pro Live Support** if you have any trouble going through the steps related to your PayPal Payments Pro account (<u>https://www.paypal.com/us/webapps/helpcenter/helphub/home/</u>) or **1-888-818-3922**.

Steps to Request the API Credentials

IMPORTANT! You'll need appropriate <u>security clearance</u> to complete this task, if you don't currently have it, one of your database administrators will need to provide it.

First, you'll need to **apply** for your PayPal Payments Pro account to get it setup, and **activated** (*this will likely require that you provide a variety of personal and banking information to accomplish these steps*).

Apply by Phone: <u>https://www.paypal.com/us/webapps/mpp/pro-telesales-signup</u> Apply Online: <u>https://www.paypal.com/us/webapps/mpp/pro-telesales-signup</u> ---Taken directly from the PayPal Developer help article---

https://developer.paypal.com/webapps/developer/docs/classic/api/apiCredentials/#creating-classic-api-credentials



1. Log in to PayPal.com

You must have a PayPal Business account. The url to log in is located at https://www.paypal.com

2. Navigate to the API Access page

Click the profile (person) icon in the top right and select **Profile and Settings** from the drop-down menu. Then navigate to **My Selling Tools** > **API Access** and click **Update**.

NOTE: if you do not see the profile (person) icon in the top right, navigate to the API Access page by clicking **My Account > Profile > My Selling Tools > API Access**

3. Generate the Certificate Set

1. Click Request API Credentials on the API Access page:



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Option 2 - Request API credentials to create your own API username and password.

This option applies to:

- Custom websites and online stores
- · Pre-integrated shopping carts running on your own server



Note: If you've already generated a set of API credentials, you'll have to delete your existing set before you can generate a new set of credentials.

2. Select Request API signature and click Agree and Submit to generate a set of Signature credentials.

Here's an example showing a set of Signature credentials (for <u>Certificate</u> credentials, see the section below):



/iew or Remove API Signature								
Developers: Do not share your credential information with anyone. Store in a secure location with limited access.								
F or preconfigured shopping carts: Copy and paste the API username, password, and signature into your shopping cart configuration or administration screen.								
For building custom shopping carts: Store the following credential information in a secure location with limited access.								
	Credential	API Signature						
	API Username	krich_api1.ebay.com						
	API Password	R2CV5XCLEYEMQ7RH						
	Signature	ACxwNDtvkO2nsXs2fa4ldAjRq98TA204gsd2ODrvR4mTZY.e.nYU15Sh						
	Request Date	Mar 29, 2013 08:48:34 PDT						
		Done Remove						



Steps to Add the Credentials to your Trail Blazer Database

Log into Trail Blazer and navigate to the Payment Gateway screen by following Application Menu > System Manger > Settings > Payment Gateway.

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Customize Labels
Website Configuration
Update Unique Search Values (Drop Downs)



Select **PayPal Payments Pro** as the merchant option, input your API credentials into the corresponding fields in the upper-right, and then click **[save-and-close]**.

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Application Menu « Application Menu « Tasks Tasks Calendar/Tasks Calendar/Tasks Canvassing Contact Communications Financial System Manager System Gallery Customize Labels Payment Gateway Vebsite Configuration Website Configuration Update Unique Search Values (Drop Downs) Tools	 File ▼ Edit ▼ Ø (No Gateway) Enable For Testing Note: Test transactions WILL post to database. Authorize.Net Payjunction ICSAccess Vanco PayPal Payments Pro PayPal Payflow (Requires 3rd Party Merchant Account) I PayPal Payflow (Requires 3rd Party Merchant Account) I PayPal Payflow (Requires 3rd Party Merchant Account) I ACH eCheck 	 PayPal User PayPal Password PayPal Password PayPal Signature Ctore ID: Isc ID: Vanco User ID: Vanco Client ID: Vanco Client ID: Vanco Password: Displayed Card Typ ✓ visa Visa ✓ = American Ex Notes Create on 11/9/200 	ikrist_api1.ebay.com ACxwNDtvkO2nsXs2fa4ldAjRq98 fake fake fake fake fake fake jake 09 3:19:53 PM, System message.	
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Once that's complete, navigate to the Website Configuration screen, and click the blue hyperlink in the upper-right to refresh your web settings.



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System Manager	Is Enderal (Employer (Occupation) *Required			Include Disclaimer A Default Disclaimer Incort Security Text					
	is rederal (Employer / Occupation) Required				Include *Required Confirm Eligibility Checkbox				
Settings	Is Email Address "Required								
Customize Labels	V Disable Captcha			<pre> <br <="" th=""/></pre>					
	Include Comments								
Website Configuration	Include Honor of								
	Include Middle Name								
	Include Nick Name								
	Include Lawn Sign Component								
	☑ Include Donation Other Amount								
	☑ Include Donation Level Description(s)					e.aspx and a button that allows you to display Trail Blazer's secure certificate information. dr>			
	Include Donation Ticker								
	Ticker Size: 10								
	Ticker Start Date:								



You're now finished with the steps. Next you'll want to integrate your donation form with your website, and process a test donation. The related resources below link to relevant articles, videos, and a few 3rd party resources.

Tip: Your **Trail Blazer Web Services Application Menu** is located at <u>www.trailblz.info/YourDatabaseName</u> and should be a site that you bookmark because it's how you can quickly view/link your events, donation form, etc.





- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

- Article: Linking your Website to your Database with Configurable iFrame Forms
- Article: Website Configuration
- Article: How to Put your Trail Blazer Donation Page on your Facebook Page
- Link: The Entire List of Merchant Gateways Trail Blazer Supports w/Price Calculator

Video: Iframes



Video: Attributes, Add to Donation Page

- 3rd Party Resource: PayPal Developers Site How to Generate API Credentials (PayPal Payments Pro)
- 3rd Party Resource: PayPal's Help Article on API Configurations
- 3rd Party Resource: PayPal Payment Pro API Error Codes
- 3rd Party Website: <u>PayPal Payments Pro Home Page</u>

Trail Blazer Live Support

- C Phone: 1-866-909-8700
- Email: <u>support@trailblz.com</u>
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>



* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.