

WP Affiliate Manager – PayPal Mass Pay

Step-by-Step Tutorial

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Requirements

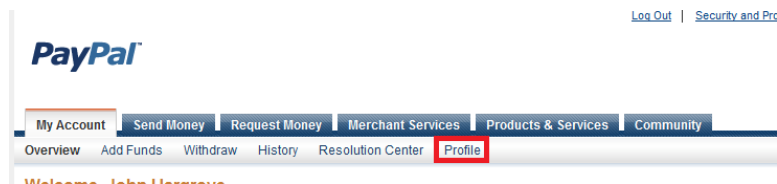
To perform PayPal Mass Payments, you will need the following:

- WP Affiliate Manager 1.3 or greater
- A PayPal Premier or Business account
- PayPal API credentials – explained below

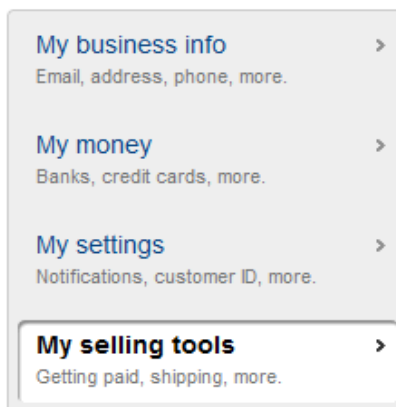
Step 1: Acquiring Your API Credentials

In order for the WP Affiliate Manager (WPAM) to communicate with PayPal, it needs access to your account via the PayPal API. This allows WPAM to access your account and process transactions without knowing your PayPal username and password. The credentials can be revoked at any time by you, allowing you to protect your account.

To begin, login to your PayPal account, and go to the My Account tab. You should have a link on the link bar named **Profile**.



Click Profile and you will be taken to another page information about your Paypal account. On the left menu, click **My selling tools**.



On the following page, you will be presented with a list of options. Click the **Update** link next to **API Access**.

API access	Manage API credentials to integrate my PayPal account with my online store or shopping cart.	Update
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Next you'll be shown the API Access page where you'll be presented with two options. You'll want to select Option 2, **Request API Signature**. (Note, it may also say View API Signature if you've already completed the request process.)

Option 1 - Grant API permissions to a third party to use certain PayPal APIs on your behalf.

Choose this option if:

- You are using a pre-integrated shopping cart, hosted by a third party
- Your website is hosted and managed by a third-party service provider

[Grant API permission](#)

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

[Request API credentials](#)

The next page will ask you whether you want an "API Signature" or an "API certificate". WPAM currently only supports the "API Signature" option. Select **Request API Signature**, and then click **Agree and Submit**.

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.

Request API signature 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.

Request API certificate if your shopping cart or solution provider requires a file-based certificate.

Need help deciding which credential is right for your needs? [Learn more](#)

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

Agree and Submit

You should be brought to a page containing your personal API credentials that looks something like this:

Credential	API Signature
API Username	[REDACTED]
API Password	[REDACTED]
Signature	[REDACTED]
Request Date	Jan 22, 2011 12:25:20 PST

Save these values somewhere and move on to Step 2.

Step 2: Configuring WPAM

Out of the box, WPAM has PayPal Mass Pay disabled. If you try to use PayPal Mass Pay, you will see this screen:

PayPal Mass Pay

Not configured

You have not configured the Affiliate Manager with your PayPal account information. You can do so in the [Payment Settings page](#).

Click the link, and you'll be brought to the PayPal Settings. This is where we'll enter our credentials PayPal gave us before. Check the **Enable PayPal Mass Pay** checkbox, and fill in the values. For the **API End Point** dropdown, select **LIVE**, unless you are using the PayPal Sandbox. If you are unsure, select **LIVE**.

Enable PayPal Mass Pay™

NOTE: Requires a PayPal Premier or PayPal Business account

PayPal API Configuration

API Username	<input type="text" value="castor_1294111788_biz_"/>
API Password	<input type="password" value="••••••••"/>
Signature	<input type="text" value="AsaT6blQoEKAqTh8yzrIjl"/>
API End Point	<input type="text" value="Live (https://api-3t.paypal.com/nvp)"/>

WARNING: Set to LIVE if you don't know what this is for!

[Save Settings](#)

Click **Save Settings** and move on to Step 3.

Step 3: Making a Payment

Now that WPAM is configured for PayPal Mass Payments, you should see the following screen when you go to the PayPal Mass Pay page in the WPAM admin menu.

PayPal Mass Pay

PayPal Mass Pay allows you to pay multiple paypal accounts at a time. To use this feature, you must have a **PayPal Premier** or **Business** level account.

You can also only pay your affiliates that have a PayPal account from which to receive funds. Affiliates do **not** require a Premier or Business level account to receive funds this way.

New Mass Payment

View Previous Mass Payments

Click **New Mass Payment** and you will be shown a page that shows all of your affiliates that have selected PayPal as their preferred method of receiving money, as well as their balances.

Select Affiliates to Pay

Not showing 0 affiliates that do not have a PayPal account on file.

Date Range: from to

<input checked="" type="checkbox"/>	AID	First Name	Last Name	Company	PayPal E-Mail	Balance	Payment Amount
<input checked="" type="checkbox"/>	3	Dave	Grohl	some co	████████.com	+\$101.25	<input type="text" value="101.25"/>
<input checked="" type="checkbox"/>	1	Bob	Denver	My co name	████████.com	+\$50.00	<input type="text" value="50.00"/>
<input type="checkbox"/>	2	Steve	Perry	any	████████.com	+\$7.00	<input type="text" value="7.00"/>

Sub-Total	\$151.25
PayPal Fee	\$2.00
<small>2% per payment, max \$1 per payment</small>	
Estimated Total	\$153.25

Continue with these payments

By default, only affiliates who have earned more than the minimum payment requirement will have a check box next to them. However, you can add a check next to any of the affiliates who have not reached the payment minimum to send them a payment if you choose.

The Payment Amount column allows you to specify the amount you wish to pay each affiliate, which defaults to the affiliate's current standing. The totals at the bottom will update automatically when you modify the payments in the table. Once you've selected the payments you'd like to send, you'll be asked to review the payments before submitting to PayPal.

Affiliates who have been marked as inactive and have an unpaid balance will be displayed in red.

Review Your Mass Payment

AID	First Name	Last Name	Company	PayPal E-Mail	Balance	Payment	New Balance
3	Dave	Grohl	some co	█.com	\$+101.25	- \$101.25	= \$0
1	Bob	Denver	My co name	█.com	\$+50.00	- \$50.00	= \$0

Sub-Total	\$151.25
PayPal Fee 2% per payment, max \$1 per payment	\$2.00
Estimated Total	\$153.25

[Submit Mass Payment to PayPal](#)

As you can see above, I entered a \$101.25 payment to Dave Grohl and a \$50.00 payment to Bob Denver. WPAM will estimate the fees for this mass payment. This is subject to PayPal's whims. The current formula is 2% per payment up to a maximum of \$1 per payment. Additional fees may apply for international transactions and will **NOT** be shown here.

WPAM will show you the current balance of your affiliates, the payment you're going to send them, and the expected new balance. Click **Submit Mass Payment to PayPal** to send this payment.

If the payment is successful, you'll be presented with a success screen. The payments will be applied to your affiliates as a pending transaction. They will remain pending until the results of the mass payment are known. When you get to this success screen, it simply means that PayPal accepts your list of payees and will try to get the money to them. The status of each individual payment is reconciled later.

Payment Submitted

Success! Your Mass Payment was submitted to PayPal. Your reference ID is **5b3917d8d0ca3**

Please note that the payment has been applied to your affiliates as a **PENDING** payment.

PayPal has not yet reported whether or not these payments were successful, and they need to be reconciled properly. You may [view this pending payment here](#).

The payment has been submitted and now we wait.

Step 4-A: Reconciling Payments Automatically

WPAM keeps a record of every payment you've ever sent using PayPal Mass Pay.

PayPal Mass Pay

PayPal Mass Pay allows you to pay multiple paypal accounts at a time. To use this feature, you must have a **PayPal Premier** or **Business** level account.

You can also only pay your affiliates that have a PayPal account from which to receive funds. Affiliates do **not** require a Premier or Business level account to receive funds this way.

New Mass Payment

View Previous Mass Payments

Click **View Previous Mass Payments** to view a list of all payments processed by WPAM.

View Existing Payments

	ID	Date Posted	PayPal ID	Amount	Fee	Total	Status
View	58	01/22/2011 21:05:46	5b3917d8d0ca3	5.00	0.10	5.10	pending
View	57	01/22/2011 21:05:16	459a27003c04f	5.00	0.10	5.10	failed
View	49	01/22/2011 19:52:49	7e99db70119bc	2.00	0.04	2.04	failed
View	48	01/22/2011 19:52:16	4ad561e5fe5e	1.00	0.02	1.02	reconciled
View	47	01/22/2011 19:51:29	bdd529c0dbced	1.00	0.02	1.02	reconciled

Here we can see a couple failed payments (my API configuration was incorrect), a couple completed payments, and the \$5.00 payment we issued in this tutorial. Let's view that by clicking **View** next to the \$5.00 payment.

Payment Detail						
ID	Date Occurred	Affiliate	PayPal E-Mail	Status	Description	Amount
58	01/22/2011 21:05:46	Billy Bob	castor_1294112124_per@gmail.com	pending	PAYOUT via PAYPAL MASS PAY	-\$5.00

This view shows the status of the overall mass payment and all of the associated transactions. In this case, I just have one associated transaction.

How do we reconcile this payment? Well, first we need to find out if the mass payment is actually complete. We can do this by logging into our PayPal account. Go to **My Account** and select **History**.



You will be shown a list of transactions on your account. Find the row for the mass payment we sent. Mine looked like this:

Jan 22, 2011	Mass Payment Sent To	Mass Payment	Completed	Details	-\$5.00	-\$0.10	-\$5.10 USD
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Notice that the status is **Completed**. This means PayPal is done processing the payments, and this mass payment can be reconciled with WPAM. Click **Details**. You will be shown a summary of the payment results.

Near the bottom of this page is a link to download a comma-separated values (CSV) file. This is what we're going to use to reconcile the payment in WPAM.

[Review all of your payments](#)

Download the payment log to view all the individual payments within a Mass Payment.

[Download Log \(CSV\)](#)

Click **Download Log (CSV)**. Save the file somewhere on your computer and remember the location. Head back over to WPAM. We should still be on the Payment Detail screen. Click Reconcile using **PayPal Mass Payment results file**. You will be brought to a page with a file upload field. Use this field to select the file we downloaded from PayPal, and click **Reconcile with this file**.

Manual Reconciliation

Database ID	58
Date Occurred	01/22/2011 21:05:46
PayPal Timestamp	01/22/2011 21:05:41
PayPal Correlation ID	5b3917d8d0ca3
Amount	5.00
Fee	0.10
Total Amount	5.10
Status	pending

Please upload the results file.

Results File: No file chosen

If the file you uploaded is valid, you will be given the opportunity to review the outcomes contained within the results file.

Please confirm the results of the file

ID	Date Occurred	Affiliate	PayPal E-Mail	Status	Description	Amount	Outcome
133	01/22/2011	Billy Bob	castor_1294112124_per@gmail.com	pending	PAYOUT via PAYPAL MASS PAY	\$-5.00	pending → confirmed

[Reconcile Mass Payment](#)

In my case, according to the file, the payment was successfully deposited to Billy Bob's account. I agree with this, so I'm going to click **Reconcile Mass Payment**. The transaction will be changed to 'confirmed', and the mass payment will be marked 'reconciled'. This mass payment is complete.

Payment Detail

Database ID	58
Date Occurred	01/22/2011 21:05:46
PayPal Timestamp	01/22/2011 21:05:41
PayPal Correlation ID	5b3917d8d0ca3
Amount	5.00
Fee	0.10
Total Amount	5.10
Status	reconciled

Associated Transactions

ID	Date Occurred	Affiliate	PayPal E-Mail	Status	Description	Amount
133	01/22/2011	Billy Bob	castor_1294112124_per@gmail.com	confirmed	PAYOUT via PAYPAL MASS PAY	\$-5.00

Step 4-B: Manually Reconcile

If you are unable to reconcile the payment using the results file, there is an alternative method. Let's go back to that page with the pending \$5.00 payment to Billy Bob.

This time, we're going to click **Manually reconcile payments**.

Payment Detail

Database ID	59
Date Occurred	01/22/2011 21:47:38
PayPal Timestamp	01/22/2011 21:47:33
PayPal Correlation ID	1628d9fb5897
Amount	5.00
Fee	0.10
Total Amount	5.10
Status	pending

Reconciliation

[Manually reconcile payments ...](#)

[Reconcile using PayPal Mass Payment results file ...](#)

Associated Transactions

ID	Date Occurred	Affiliate	PayPal E-Mail	Status	Description	Amount
134	01/22/2011	Billy Bob	castor_1294112124_per@gmail.com	pending	PAYOUT via PAYPAL MASS PAY	\$-5.00

This will take you to a page where you can manually select the outcome of each transaction.

Please select the outcome for each transaction.

ID	Date Occurred	Affiliate	PayPal E-Mail	Status	Description	Amount	Outcome
134	01/22/2011	Billy Bob	castor_1294112124_per@gmail.com	pending	PAYOUT via PAYPAL MASS PAY	\$-5.00	<input type="text" value="Success"/>

[Reconcile](#) [Failed](#) [Cancel](#)

I know Billy Bob received the money (my PayPal account tells me so), so I will select **Success** from the dropdown menu next to his transaction. Once I have selected an outcome for all transactions, I click **Reconcile Mass Payment**, completing this mass payment.