

Using PayPal

Ubersmith can accept, automatically apply payments received, and refund payments through your PayPal account.



Signing up for a PayPal account is outside of the scope of this document, but more information is available at: <http://www.paypal.com>

Enabling PayPal Instant Payment Notification (IPN)

Ubersmith uses PayPal's Instant Payment Notification (IPN) system to stay informed of activity on your PayPal account.

1. Configure your PayPal IPN. Instructions are available [here](#).
2. [Access the Payment Processing Options page](#).
3. Complete the PayPal section.

Applying Automatic PayPal Payments

PayPal payments are only automatically applied when the incoming payment email address matches the client's email in Ubersmith, and the payment exactly matches the invoice amount. If these conditions are not met, the email address specified in the PayPal Notification Address configured in the Payment Processing page receives an email that the automatic payment did not receive and the payment is issued as an account credit. See [Managing Invoices](#) to apply the credit to the specific invoice.

Issuing PayPal Refunds

To process a refund for a PayPal payment, you have the option to automatically reverse the payment back to the client or to mark it as a manual refund. When you reverse the payment, Ubersmith connects to PayPal and directly immediately refunds the payment back to the client. Marking a manual refund only reverses the payment in Ubersmith, and returning any funds to the client needs to be done manually through PayPal.

Viewing Billing Agreement Pending Payments

Invoices paid with a PayPal billing agreement are marked as pending payments, until the payment clears. Ubersmith checks PayPal every hour to see if the payment has been processed. If several different forms of payment are used, the PayPal billing agreement amount is set aside as pending, and the rest of the invoice processes. If the payment does not clear within seven days, or the payment is denied for other reasons, the payment is deleted and the invoice balance is still due.

Related Topics

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