Digibilly™ Cloud Pay 1.00.F

Obtaining A PayPal® Application ID

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INTRODUCTION

PayPal™ requires anyone using the Adaptive Payments API to Register the Application being used and to obtain an Application ID (APP ID) for it, before they can begin accepting live payments.

This guide also assumes that you have a Verified Premier or Business Account in good standing, which PayPal™ requires to use the Adaptive Payments API.

On the following pages, we'll walk you through the Application process step-by-step. While it seems a bit daunting on the surface, it's actually quite easy and should only take about 20 minutes or so to complete.

Before getting started, we need to familiarize you with a couple of terms that PayPal™ uses, to avoid any confusion:

- **Primary Receiver** - You, as the Merchant, are the Primary Receiver. PayPal™ sometimes also refers to this role as the API Caller.

- **Secondary Receiver** - This role is filled by your Affiliates and JV Partners, if any.

- **Sender** - This is your Customer who is buying a product or service from you.

Now we're ready to get started - navigate to the PayPal™ Developer Site using the link below:

https://www.paypal-apps.com

You're going to log into this site using your Primary PayPal™ Email Address. Once you've logged in, you'll see a menu (shown on the right) and will click the New App menu item to load the Application.

Each section of the Application is described in detail on the following pages. We've also provided some text for you to edit and copy/paste into the relevant sections to help expedite the process.

My Applications

My Applications

New App

View/Manage My Apps

My Messages

APP INFORMATION

This first section of the Application is used to provide a Title and Description of what the Application does as well as it's Operating Platform.

You'll start by giving the App a unique Title - you cannot use Digibilly™ Cloud Pay (this is a quirk of PayPal's system) as we're already using it. Instead, name it something simple, i.e.; Bill's Cloud Pay or something similar, that you'll easily recognize.

App Information

Title *

On what platform does your app run? *

Web

Please describe what your application does in detail and how each of the API features will be used by your application *

Next for this section, leave the drop-down list asking, "On what platform does your app run?" set to **Web**. While it is accessible by Mobile Devices operating on those other Platforms, it is designed specifically for the Web.

Lastly, for the Description, you will copy and paste the text listed on the next page in blue italics - you will need to modify the words in the square brackets (the Title you selected and the Live Sales Page URL) in order to ensure its customized to your specific website.

⚠ Please do not modify any other portions of the text - doing so may cause delays in obtaining your APP ID.

DESCRIPTION TEMPLATE

Please describe what your application does in detail and how each of the API features will be used by your application (copy and paste):

*[**APP TITLE**] is a PHP script (application) I am going to use on my website to manage order processing and fulfillment of Digital Products I've developed. It makes use of the PayPal Adaptive Payments API (Chained Payments) so that I may automatically pay Commissions to my Affiliates upon the successful completion of each transaction.*

Once the script is live, Affiliates "Apply" to work for me to promote my products. Once vetted, they may then refer potential customers to my website using a typical affiliate referral link mechanism controlled by the script.

*When a customer clicks the order button on my sales page ([**LIVE SALES PAGE URL**]), the application submits the details of the pending transaction to PayPal for a Pay Key and then forwards the customer to PayPal to complete the transaction. If an Affiliate was involved, the payment is automatically split between my account (Primary Receiver) and the Affiliate's account (Secondary Receiver) using Chained Payments.*

Upon successfully completing the payment, the customer is returned to my website's Thank You page. The customer in turn, receives an email with the instructions for downloading the Digital Product from a secure storage area online.

If the customer cancels the transaction at PayPal before completing it, he or she is returned to the Cancellation page on my website.

If the customer requests a refund, the script allows me to do so from within the application, using the Refunds API. That automates the process of refunding the Affiliate payment to my account and the payment I received back to the customer. As the API caller, I will be the only person involved in processing refunds.

INDUSTRY AND USE CASES

As shown below, the next step is to indicate the Industry Use Cases this application is designed for. Be sure to tick "None of the Below" - ticking any other option will require you to provide supporting documentation under "Additional Info" and will significantly delay approval for an APP ID.

Lastly, from the drop-down list for "Select from the Use Cases Below", choose "Digital Goods". Again, choosing any other option will require you to provide supporting documentation under "Additional Info" and will significantly delay approval for an APP ID.

⚠ If you need to pursue an "Advanced Use Case" for your implementation of Digibilly™ Cloud Pay, you will need to discuss that directly with PayPal™.

ADAPTIVE PAYMENTS

Now you need to define the type of Adaptive Payments you'll be using with this script. Tick the "Chained Payments" checkbox only - Digibilly™ Cloud Pay does NOT support Basic Payments or Preapprovals at this time.

When you tick the "Chained Payments" checkbox, additional fields will be displayed. Leave the "Instant" radio button ticked and under "Who pays the fee?" tick "Primary Receiver".

Next, in the textbox labeled, "Who is the primary receiver?", enter your Primary PayPal™ Email Address. In the next textbox labeled, "Who is (are) the secondary receiver(s)?", enter "Affiliates and JV Partners".

⚠️ Whether or not you choose to modify the Funding Sources is entirely up to you. Minimally, you must keep the PayPal™ checkbox ticked.

This is more or less a permanent decision, so if you do not want to support Credit Card or E-Check payments un-tick them now. If you change your mind, you will need to re-apply for an APP ID, so we recommend that you leave them all ticked.

The next part you need to consider carefully - what do you anticipate your "Monthly Payment Volume" being? In other words, are you doing $5K a month, $10K a month, etc.? I recommend you set this to twice what your present volume is - it leaves room for growth.

After entering that amount, then enter what the "Average Transaction Amount" is per sale. In other words, what is the average price of your products? This is usually going to be a low figure like $7.77, $19.95, $97, etc.

Tick the "Yes" radio button under, "Do you have an Acceptable Use Policy?" and in the textbox labeled, "Where can we find it?", you'll enter "We hotlink directly to PayPal's AUP". This means that you will need to add a link to the footer of your sales and other pages that point to it. The link to use is:

https://cms.paypal.com/us/cgi-bin/marketingweb?cmd=_render-content&content_ID=ua/AcceptableUse_full&locale.x=en_US

In the "Who is Responsible for Chargebacks and Refunds?" textbox, enter the phrase, "Primary Receiver". You, as the Merchant, are the Primary Receiver, while your Affiliate is the Secondary Receiver.

ADAPTIVE ACCOUNTS

Digibilly™ Cloud Pay does not use Adaptive Accounts - this section is only mentioned for you to ensure that NONE of the checkboxes shown below are ticked:

▼ Adaptive Accounts Create and manage PayPal Personal, Premier, and Business accounts.
    What Adaptive Account features will the app use?
    ☐ Create Personal and Premier Accounts Only
    ☐ Create Business Accounts
    ☐ Add Bank Account
    ☐ Add Credit Card
    ☐ Get Verified Status

3RD PARTY PERMISSIONS

In this section, you're going to tick the "Refund A Transaction On Your Behalf" checkbox.

The purpose of this is to ensure that when you Refund a Payment to a Customer, the Affiliate's Commission is automatically Refunded back to you as well.

After you approve an Affiliate, the first time they log in to get their Affiliate links, they are forced to Grant Refund Permissions to you on their PayPal™ account. Until they do that, they cannot do anything in the script.

After they Grant Refund Permissions to you, if they subsequently "Un-Grant" or remove them through their PayPal™ account, they will not be paid Commissions for any other referrals made until they log into the script and Grant the Permissions again.

INVOICING

Digibilly™ Cloud Pay does not use Invoicing - this section is only mentioned for you to ensure that the checkbox for Online Invoicing shown below is NOT ticked:

TESTING INFORMATION

For the "Step-By-Step Payment Flows instructions" you will copy and paste the text below in blue italics.

For the test URL, you're going to enter the URL to the location where you installed Digibilly™ Cloud Pay. Then enter your PayPal™ Email Address and Password used to log into the script.

PAYMENT FLOWS TEMPLATE

Step-By-Step Payment Flows instructions (copy and paste):

In this test scenario, the word "My" refers to the Primary Receiver and API Caller (me), the word Affiliate refers to the Secondary Receiver and the word Customer refers to the Sender.

In a typical payment flow, an Affiliate refers a Customer to the my sales page using a link. When this link is clicked by the Customer, he or she is taken to the location where the script is installed. The script sets a cookie to track the Affiliate and then redirects the Customer to the actual sales page with a Buy Now button.

When the Customer clicks the "Buy Now" button on the sales page, the Customer is transparently returned to the location where the script is installed. The script preprocesses the transaction, submitting the relevant information to PayPal to obtain a "Pay Key".

Upon the successful receipt of the Pay Key, the Customer is redirected to PayPal to complete the transaction. If the Customer successfully completed the transaction he or she is returned to my Thank You page. If the Customer cancelled the transaction before completing it, he or she is returned to my Cancellation page.

In this test scenario, the payment is split between the Affiliate and the myself, with the me paying the PayPal fees and the Affiliate receiving a percentage of the gross payment.

To execute a Refund, click the Sales menu item and allow the page to reload. Then locate the transaction you wish to refund in the table, click the Refund link and the Refund page will load.

This page displays the basic transaction details - clicking the Refund Payment button, executes the process, which may take up to 20 seconds or so. When complete, the page will reload with the transaction details disabled, and a message indicating the status of the refund.

In this process, if the payment involved an Affiliate, the Affiliate's payment or "Share" of the Chained Payment is refunded to the me. The customer's payment is then refunded in full automatically. The remainder of the script's features are unrelated to PayPal, in that they facilitate back office management of Affiliates, Products, Secure Downloads etc.

BUSINESS INFORMATION

This last section you will configure as shown below - you will NOT put the Application in their App Gallery, nor will you provide a Live URL.

Business Information

To speed up the review process, please upload any relevant business documents (eg. business registration, proof of address, ID card).

Add a new file

[Choose File] No file chosen   Upload

Files must be less than **2 MB**.
Allowed file types: **pdf png jpg jpeg doc docx.**

Would you like your application considered for listing in our App Gallery?

● No
○ Yes

Please Provide your live URL if available

[   ]

[Submit App] [Save Draft] [Cancel]

In the, "Please Provide your live URL if Available" textbox, the URL to the location where you installed Digibilly™ Cloud Pay.

The only thing you need to do at this point is click the Submit App button. Assuming everything was entered properly, the page will reload and display your APP ID with Conditional Approval as shown in the example below:

Digibilly Cloud Pay Basic   Submit Time: 4/7/13

Sandbox ID: APP-80W284485P519543T   Retire App
Live App ID: ████████████████   Manage Users

Status: Approved Conditionally

[Status Messages] [View History]

You may now copy your Live App ID and paste it into Digibilly™ Cloud Pay in the PayPal™ API Credentials section.

If there were any errors, the page will reload the Application, highlighting which fields need to be corrected.

WHAT TO DO NEXT

With Digibilly™ Cloud Pay configured (and presumably Activated), you're now ready to add Products, Approve Affiliates and start selling. To do this, you should review the following PDF:

[Digibilly™ Cloud Pay User Guide](#)

Please contact us via email at support@digibilly.com if you have any questions, suggestions for improvements or wish to arrange for installation or maintenance.

All The Best,

The Digibilly Development Team

June 26, 2017
November 3, 2016
August 20, 2014
June 24, 2014
March 15, 2014
November 1, 2013

CONDITIONAL APPROVAL NOTES

As mentioned on page 12, once you submit your App, you're automatically given "Conditional Approval" for it and issued a Live App ID. You then copy this Live App ID and paste it into Digibilly™ Cloud Pay in the PayPal™ API Credentials section.

While you're testing Digibilly™ Cloud Pay with your Live App ID, if you encounter any problems, the first thing to do is to log into the PayPal™ Developer Site using the link below:

https://www.paypal-apps.com

Check to make sure that your Conditional Approval is still active. If PayPal™ had any questions for you, they will be listed here and meanwhile, your Live App ID will have been deactivated. Once you submit a response to their questions, you will automatically receive Conditional Approval.

You may have to go through this process several times, until PayPal™ is satisfied with your answers. Be patient and do your best to ensure that you communicate your response to them without delay.

Several customers originally reported problems to us regarding this process that turned out to be caused by their filling out the application incorrectly. Once they re-applied with the correct settings, they quickly received approval and their APP ID.

⚠ As mentioned throughout this document, it's critically important that you not deviate from completing the application with the choices we've provided, including which checkboxes you've ticked or other options you may have selected. Doing so will only prompt PayPal™ to ask a lot of questions about features and functionality that you won't actually be using with Digibilly™ Cloud Pay and will cause significant delays in obtaining your App ID.