

convio**US**



CONVIOUS GUIDE:

PayPal Commerce Platform integration

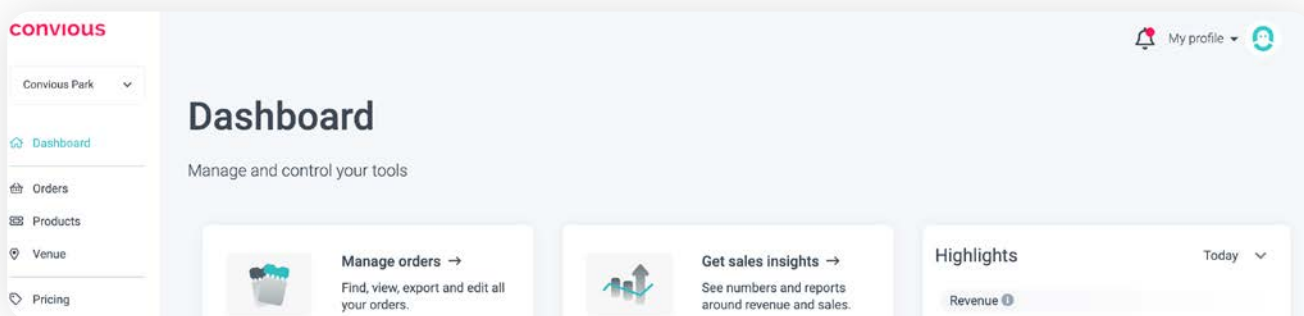
This guide is here to help you if you want to start using the PayPal Commerce Platform with ConvioUS. We recommend using a separate PayPal Business account for your ticketshop transactions.

Connect your PayPal account via the ConvioUS Control Panel

Follow these steps:

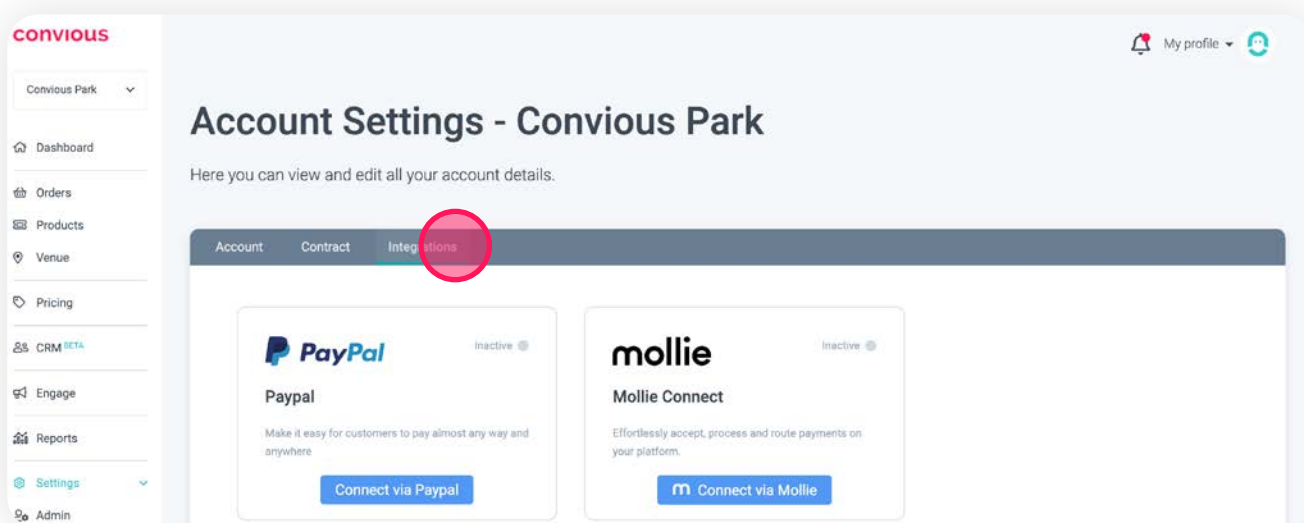
01

Log into your Control Panel



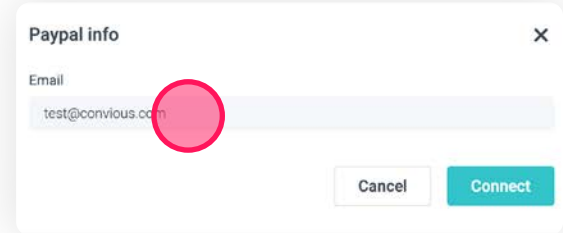
02

Click Settings > Accounts > Integrations



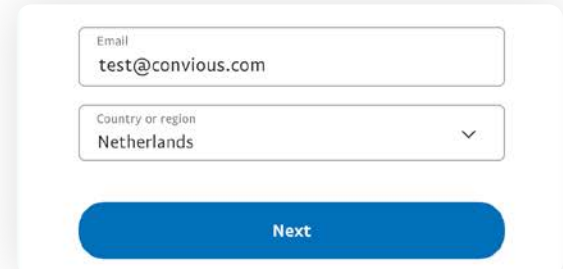
03

Click 'Connect via PayPal' and fill in the same email address that is used for the PayPal account



04

Login to PayPal with email address and password



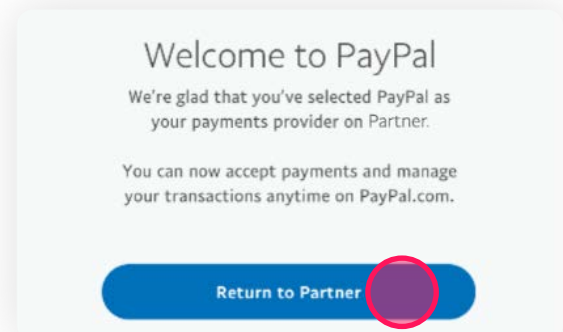
05

You then see the permissions, click on 'Agree and continue'



06

Click on 'Return to Partner' and you will be redirected to Convious



07

Reach out to your customer success manager at Convious so they can enable the connection on their side

Need more guidance?

Watch our step by step video to connect to PayPal via your Convious Control Panel

[WATCH VIDEO](#)

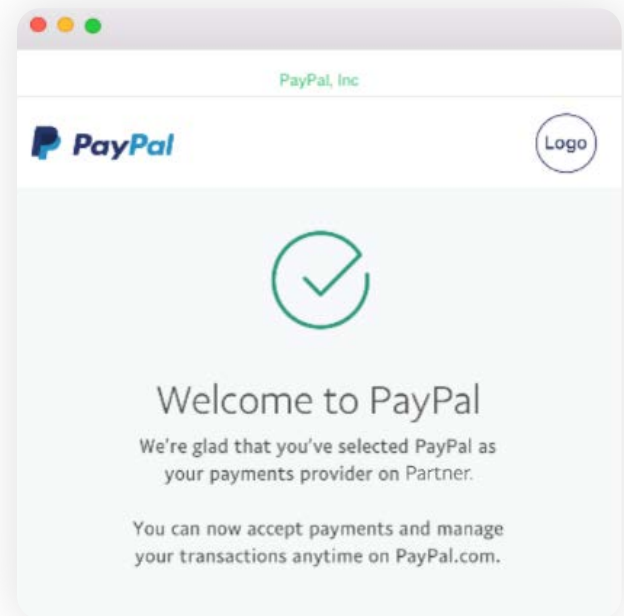
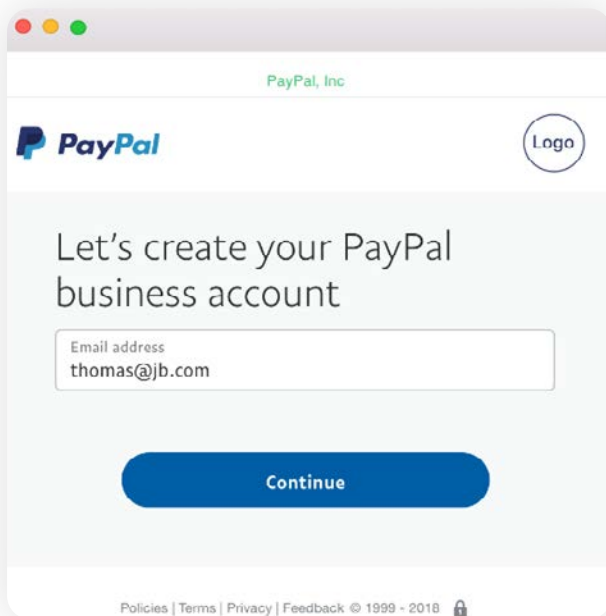
Create a new PayPal account

Start by creating a PayPal account via your Control Panel

1. Log into your Convios Control Panel
2. Click settings > accounts > integrations
3. Click 'Connect via PayPal' and fill in the same email address that you want to use for the PayPal account


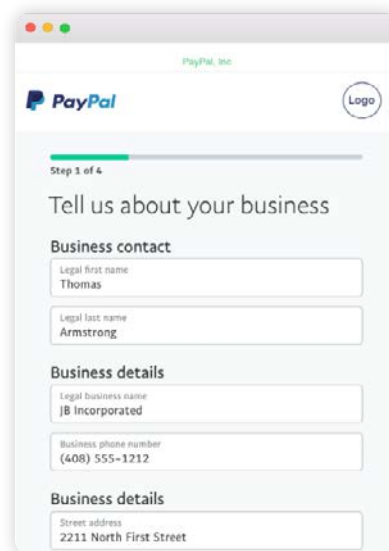
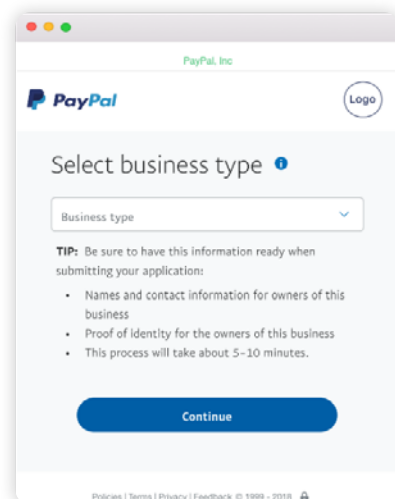
01

Create your password



02

Enter the business information



03

Enter personal information

PayPal, Inc

PayPal

Logo

Step 3 of 4

Tell us about you

We'll confirm your information to help keep your account secure, so make sure it matches what's on your legal ID.

Legal Full Name
Thomas Armstrong

9-digit SSN
123-45-6789

We'll use this SSN to run a credit check only if we are unable to verify your organizations EIN.

Date of birth
04/07/76

Nationality
United States

Home address

04

Enter beneficial owner information

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PayPal

Logo

Step 4 of 4

Provide management info

Identify one person who has controlling influence of your business. You'll need to provide the name, home address and date of birth for a manager or an executive, and beneficial owners of this company.

Does <Thomas Armstrong>, the primary authorized user, have controlling influence on the business?

☐ Yes ☒ No

Manager or executive [Add](#)

Provide beneficial owner info

US anti-money laundering laws require financial institutions to verify the identities of beneficial owners (individuals who own, directly or indirectly, 25% or more of a business).

Does your organisation have beneficial owners?

☐ Yes ☐ No

[Continue](#)

[I'll do this later](#)

PayPal, Inc

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Logo

Step 4 of 4

Provide management info

Identify one person who has controlling influence of your business. You'll need to provide the name, home address and date of birth for a manager or an executive, and beneficial owners of this company.

Does <Thomas Armstrong>, the primary authorized user, have controlling influence on the business?

☐ Yes ☒ No

John Jones [Edit](#)

Provide beneficial owner info

US anti-money laundering laws require financial institutions to verify the identities of beneficial owners (individuals who own, directly or indirectly, 25% or more of a business).

Do you have additional beneficial owners?

☒ Yes ☐ No

Is <Thomas Armstrong, PAU> a beneficial owner?

☐ Yes ☒ No

Is <John Jones, Manager> a beneficial owner?

☒ Yes ☐ No

John Jones	Ownership percentage: 40%	Edit
Jennifer Black	Ownership percentage: 30%	Edit
Angus Young	Ownership percentage: 30%	Edit

[Continue](#)

[I'll do this later](#)

PayPal, Inc

PayPal

Close

Provide beneficial owner info

Provide information for any individual who holds 25% or more equity ownership in this business.

Ownership amount

Percentage of ownership
30%

Business owner

Legal first name
Jennifer

Legal last name
Black

Date of birth
07/24/1980

Government identification type
Social security number

9-Digit SSN
987-65-4321

Home address

Country
United States

Street address
2211 North First Street

City
San Jose

State
California

Zip Code
95128

[Continue](#)

05

Upload the requested documents (ID)

The first screenshot shows the 'Provide ID documentation' page. It lists the Primary User as Thomas Armstrong (VERIFIED), the Business Manager as John Jones (with a 'Verify with ID documents' button), and the Business Owner(s) as John Jones (with a 'Verify with ID documents' button), Jennifer Black (VERIFIED), and Angus Young (VERIFIED). A link 'I'll do this later' is at the bottom.

The second screenshot shows the 'Upload identity documents' page for John Jones. It prompts for a 'Photo ID' and shows a 'Military ID.pdf' file being uploaded. A 'Submit' button is at the bottom. A link 'I'll do this later' is also present.

The third screenshot shows the 'Thanks for submitting your documents' page, indicating that documents have been received and will be reviewed. It includes a 'Return to Partner' button and a note about receiving payments and withdrawing funds.

Need more guidance in creating your PayPal account?
Here is a complete guide to help you:

SEE THE GUIDE

06

Check your PayPal account

Make sure to check your PayPal account after you've completed all the steps in order to make sure you've completed all the steps (you will get a notification from PayPal if you've missed something).

After that, you should be able to follow the process described in the first section of this document, after PayPal has confirmed the creation of your account.

FAQ

QUESTION	ANSWER
Will I get a PayPal login?	<ul style="list-style-type: none">▶ Yes, you get your own PayPal account which allows you to track all transactions
What are my advantages?	<ul style="list-style-type: none">▶ Payout goes directly to your account, so you receive your money sooner, and you can select the frequency of payouts▶ More insights into transactions, as you can login into the PayPal platform▶ Frequency of payouts (e.g. to daily) can be changed in your PayPal account
How can I handle my refunds?	<ul style="list-style-type: none">▶ Preferably through Control Panel, like you should be doing now
What about chargebacks?	<ul style="list-style-type: none">▶ Chargebacks will be deducted from your account
When will the transactions be visible in the PayPal account?	<ul style="list-style-type: none">▶ Please check in with PayPal's customer service regarding this topic
When will the payout to my bank account take place?	<ul style="list-style-type: none">▶ Please check in with PayPal's customer service regarding this topic
Where will I see my transactions?	<ul style="list-style-type: none">▶ PayPal transactions will be visible in your Control Panel and in your PayPal account

DO YOU NEED MORE HELP?

Feel free to reach out to our support team
(support@convious.com) anytime, we're always
happy to give you a hand!