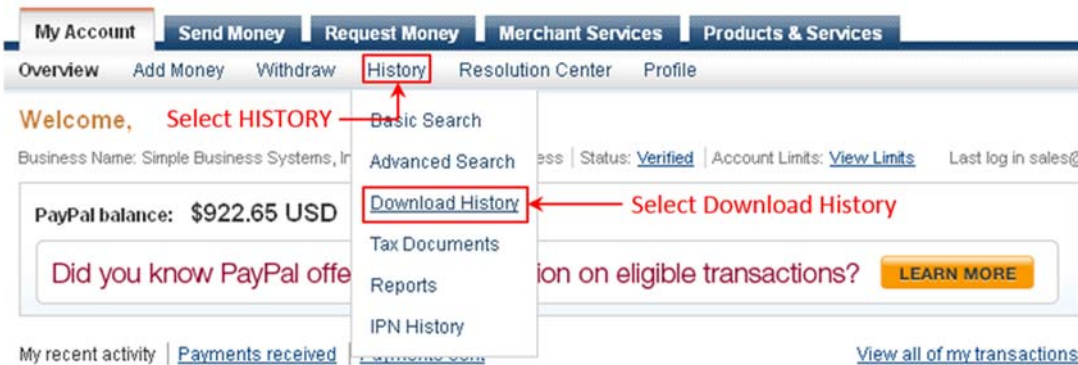


An accurate data import requires the PayPal download transaction history file include all data fields. This process takes about 30 seconds to complete. It is done once, saved and never needs to be done again.

**IMPORTANT** - If you are not the primary PayPal account holder and are using an authorized access account login for the PayPal account, you will not have the ability to complete this requirement. The primary account holder's access must be used to customize the download fields and complete the data download. Authorized access users will not have this capability.

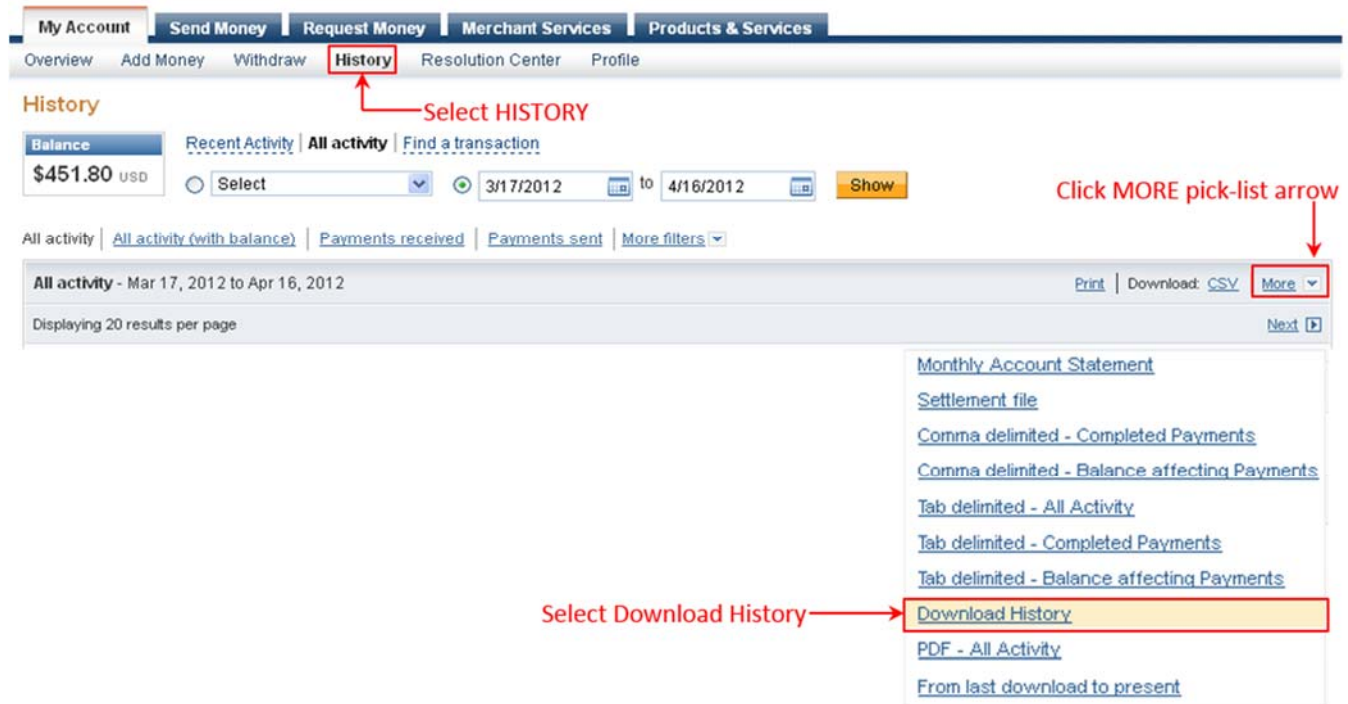
There are four different methods for accessing the **Download History** page (depends on the user interface PayPal has assigned to your account). Yes, PayPal has four different user interface displays, and we have no way of knowing which display will be presented to you...

**Method 1:** Log onto PayPal, mouse-over the **History** link on the **Overview** toolbar > click the **Download History** link



If you are not presented with a History pick-list, then follow the **Method 2** directions.

**Method 2:** Log onto PayPal, click the **History** link on the **Overview** toolbar > Click the **More** selection arrow to display the pick-list  
Click the **Download History** link



**Method 3:** If you have one of the NEW PayPal User Interfaces, log onto PayPal, click the **Transactions** link, then from the **Activity** display click the **Download** link

Select Transactions

PayPal Money Transactions Customers Tools More

Activity Bookkeeping Charts & Graphs

Activity

Download

Select Download

**Method 4:** If you have one of the NEW PayPal User Interface, once logged into your account click the **Activity** link, then click the Download link

PayPal Summary Money Activity Customers Tools More

Activity

Activity (including balance & fees) Charts & Graphs

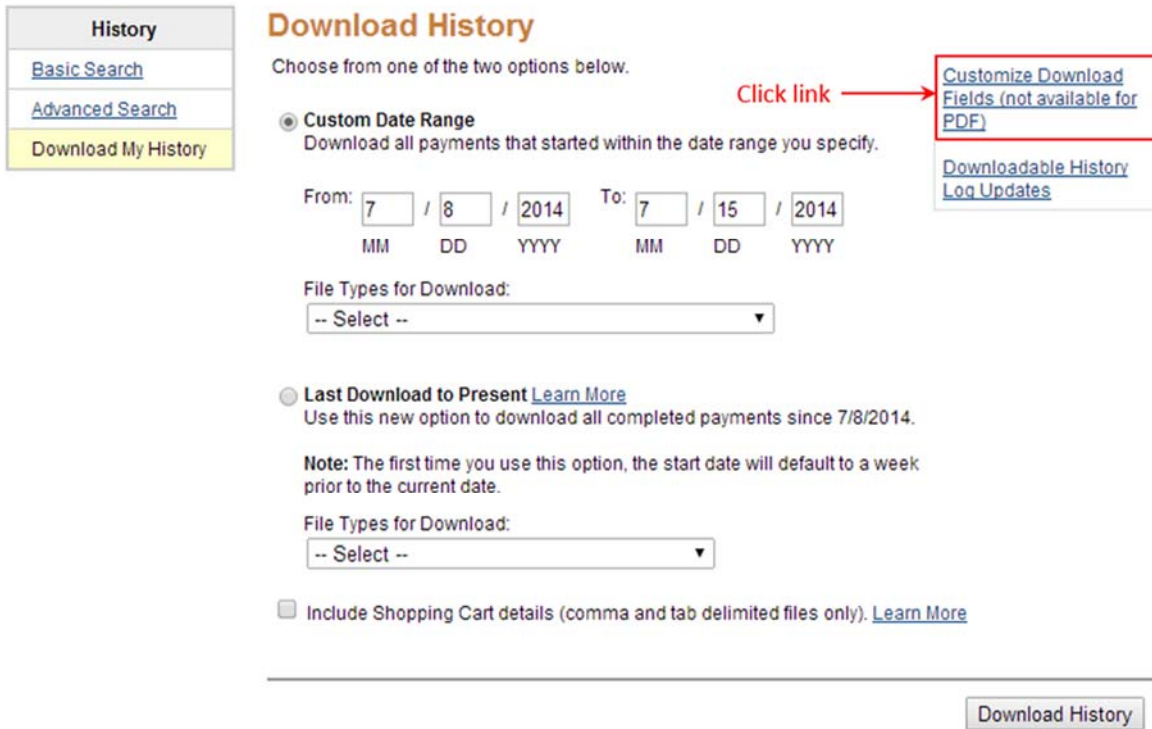
Activity

Download

Select Download

Any of these four access methods will display the **Download History** Page, see the next page in this PDF guide for completing the one-time PayPal data field customizations.

On the **Download History** page click the **Customize Download Fields (not available for PDF)** link



**History**

- [Basic Search](#)
- [Advanced Search](#)
- [Download My History](#)**

### Download History

Choose from one of the two options below.

**Custom Date Range**  
Download all payments that started within the date range you specify.

From:  /  /  To:  /  /   
MM DD YYYY MM DD YYYY

File Types for Download:

**Last Download to Present** [Learn More](#)  
Use this new option to download all completed payments since 7/8/2014.

**Note:** The first time you use this option, the start date will default to a week prior to the current date.

File Types for Download:

Include Shopping Cart details (comma and tab delimited files only). [Learn More](#)

[Download History](#)

On the **Customize My History Download** page, check all Field Label Checkboxes (don't skip any) even if you do not use these fields the "one-size fits all" approach for SimplePort requires they all be checked, then click the **Save** button at the bottom of the page.

See the next page of this PDF guide for an example of the **Customize My History Download** checked field labels.



### Customize My History Download

Check the boxes next to the fields you want to download. All checked fields will be included in your downloadable log.

#### Default Fields

Date, Time, Time Zone, Name, Type, Status, Currency, Gross, Fee, Net, From Email Address, To Email Address, Transaction ID, Reference Transaction ID, Receipt ID

#### PayPal Website Payments

- Item ID
- Item Title
- Invoice Number
- Custom Number
- Shipping Amount
- Insurance Amount
- Single Column Shipping Address (Address will be displayed in a single column)
- Multi-Column Shipping Address (Address will be displayed in separate columns)
- Counter Party Status (Verified vs. Unverified)
- Address Status (Confirmed vs. Unconfirmed)
- Sales Tax
- Option Names and Values
- Contact Phone Number

#### Auction Payments

- Item ID
- Item Title
- Shipping Amount
- Insurance Amount
- Auction Site
- Buyer ID
- Item URL
- Closing Date
- Single Column Shipping Address (Address will be displayed in a single column)
- Multi-Column Shipping Address (Address will be displayed in separate columns)
- Counter Party Status (Verified vs. Unverified)
- Address Status (Confirmed vs. Unconfirmed)
- Sales Tax

#### Other Fields

- Subject
- Note
- Subscription Number
- Payment Type
- Balance Impact (Any transaction that affects account balance)
- Tip
- Discount
- Seller Id

Check Field  
Label Boxes

Click Save

Once the field selections are saved you will be returned to the Download History page, the one-time PayPal settings are now complete and will not require re-selecting or re-saving.

