How to Import PayPal Donations

- Someone with access to the PayPal account needs to log into the PayPal web site
- Click in Activity/All Reports
- Click on Activites
- Click on Activity Report
- Click on Activity download
- Select "Balance affecting"

- Select a date range for the data.
    - I would suggest doing this on a monthly basis and import the prior 2 months. The range doesn't matter as the system keeps track of the last transaction that it downloaded and will only import data after that date.

- Select CSV format
- Click on Create Report
- Under Activity reports you'll see see your requested report showing a status of something like "Requested". It will change to "Download" when it completes.
- Click on the Download button once it has completed.

- You should find a file named Download.CSV in your Downloads folder.
- Double-click on the Download.CSV file
    - This will cause it to open in Excel

- In Excel:
    - Change the name of the **sheet** to "Download" if necessary.
    - File/Save As
        - Change the name to "PayPal"
        - Change the "Save as type" to "XLXS"
        - Click on Save

- Start the Access database
- Go into the Administrative Tasks tab
- If you want to change the thank-you letter which will be e-mailed, click on the "Edit External Messages" button.
    - The interface to this is pretty clunky.
    - Use the Record buttons at the bottom of the screen to advance through the various messages.
    - The message that you want has a "messageType" of "DTY19"

    - Edit the text & when you're happy with it, press the "<" or ">" Record buttons to move to another record.
- Press the "Import PayPal" button
    - You'll see a pop-up message stating how many records it imported
    - It will ask if you want to delete the PayPal.XLS and PayPal.CSV file. Answer yes if everything worked as expected.
- The donation reports and thank-you letters will be e-mailed
- In Word:
    - Run the mail merge and print any hardcopy thank-you letters.

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