

# PayPal Express Recurring Billing Setup🔗

Recurring Billing which PayPal refers to as a **Reference Transaction** takes existing billing information already gathered from a previously authorized transaction and reuses it to charge the buyer in a subsequent transaction, both **PayPal Express Checkout & PayFlow Pro** can enable **Reference Transactions**.

**Reference Transactions is not a standard product and approval is subject to a fully underwritten application.** This can include reviewing your business model and finances to determine your suitability.

This FAQ answers common questions about getting your PayPal account approved for **Reference Transactions**

## How do I get Reference Transactions Enabled with PayPal?

To request that PayPal turn on **Reference Transactions**, call your local PayPal Support Help Center. Find the [phone number at Contact](#) .

Tell PayPal that you are specifically calling so a **PayPal Specialist can enable Reference Transactions** on your account. They may try to help you set up recurring payments with a button — that is *not* what you want. They need to transfer you to a specialist who will ask you for your PayPal account information (email address), and then tell you that they filed a ticket, and you will hear back from PayPal via email on whether Reference Transactions have been enabled or not.

## Email Application

You can also contact PayPal via email.

1. [Log into](#) your PayPal account.
2. Go to the [Email Contact Form](#) .
3. Choose topic: **Business solutions**.
4. Choose sub-topic: **PayPal Payment solutions**.
5. Choose second sub-topic: **PayPal Express Checkout**
6. Copy and paste the message below, inserting your PayPal email address and name.
7. Wait for a reply.

## Example Message to send to PayPal

Hello,

Could you please enable Reference Transactions on my PayPal account (email: paypal@example.com) ?

I need this feature to sell recurring subscription products via Infusionsoft .

Kind regards,

Your Name

Summary Money Activity Reports Tools More Help

Hi Rosel How can we help?

Help Center Ask the Community Resolution Center Contact Customer Service

### Email Us

Thanks for reaching out to us. Please select the topic and sub-topic that best match your reason for contacting us.

Business solutions

PayPal payment solutions

PayPal Express Checkout

Message

Send

### Find Quick Answers

- How do I set up PayPal Marketing Solutions on my website?
- How do I set up PayPal Marketing Solutions for BigCommerce?
- How do I add a PayPal Credit banner to the footer of my Yahoo! Merchant Solutions cart?
- Is there a fee for late PayPal Credit payments?
- Can I cancel a PayPal payment?
- What are Smart Payment Buttons in PayPal Checkout?
- Why is a spoof payment still processed by PayPal?
- Why are my PayPal PLUS payments being declined?
- Are there any backup payment methods for the PayPal Cash Card?
- How will my PayPal Credit payments be applied?

## Respond to the Autoresponder

In an effort to reduce support, PayPal may send you a response from an auto-response message with some links to documentation.

Hidden in this auto-response is the following:

*If we haven't answered your question, please reply to this email and our team will answer you as soon as possible.*

You also need to respond to the auto-response before your support ticket is submitted to PayPal.

## Will My Account Qualify for Reference Transactions?

PayPal does have a set a requirements that need to be met before they enable support for Reference Transactions on your account.

Unfortunately, PayPal does not publish these requirements and based on anecdotes from customers, the requirements can be different for different businesses.

Some things that store owners have mentioned PayPal require are:

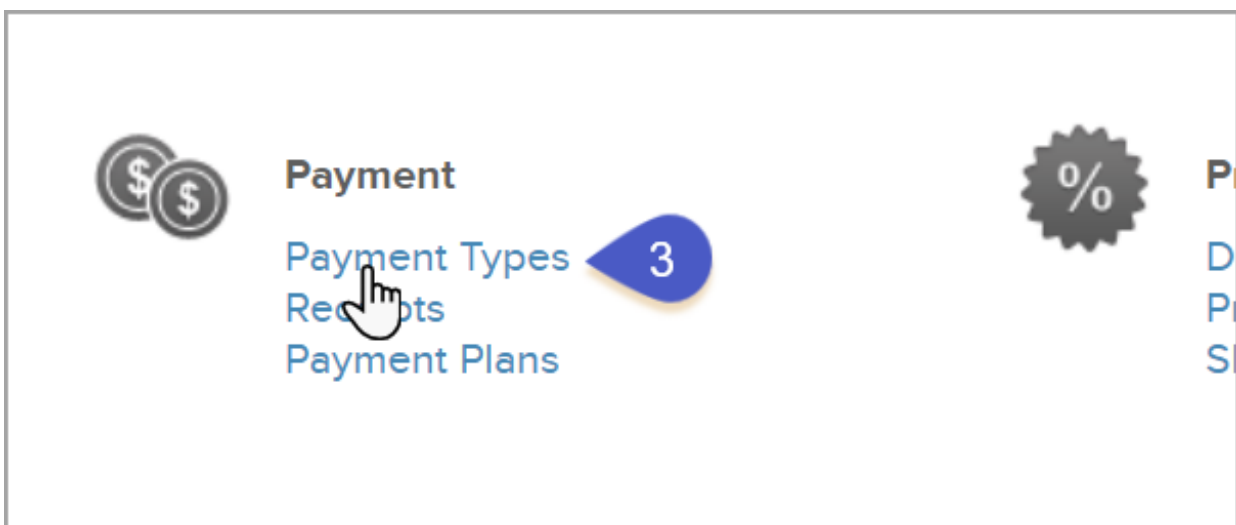
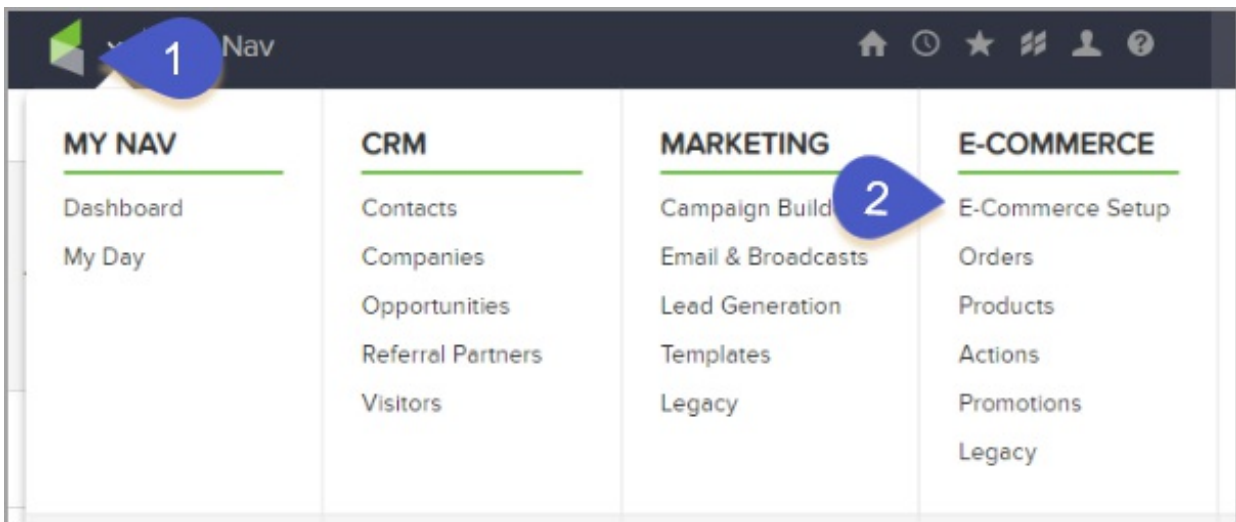
- High personal credit (FICO) score for US based PayPal Business accounts
- Business plan
- Average transaction price
- Number of repeat customers
- Number of Reference Transactions per customer
- Revenue forecast and/or projected total revenue volume from Reference Transactions
- Demonstrate a clear business rationale behind the request
- Show the signup flow for customers in regards to Reference Transactions.
- Proof that you will show clear terms and conditions for customers in regards to Reference Transactions and how to cancel once they sign up.
- Written statement as to why you need Reference Transactions and how you will use it for your business.

In terms of revenue forecasts, we have had reports that UK based PayPal accounts may require minimum forecast of £6,000 month or more revenue.

## PayPal had enabled Reference Transactions, is there anything I need to do through Infusionsoft?

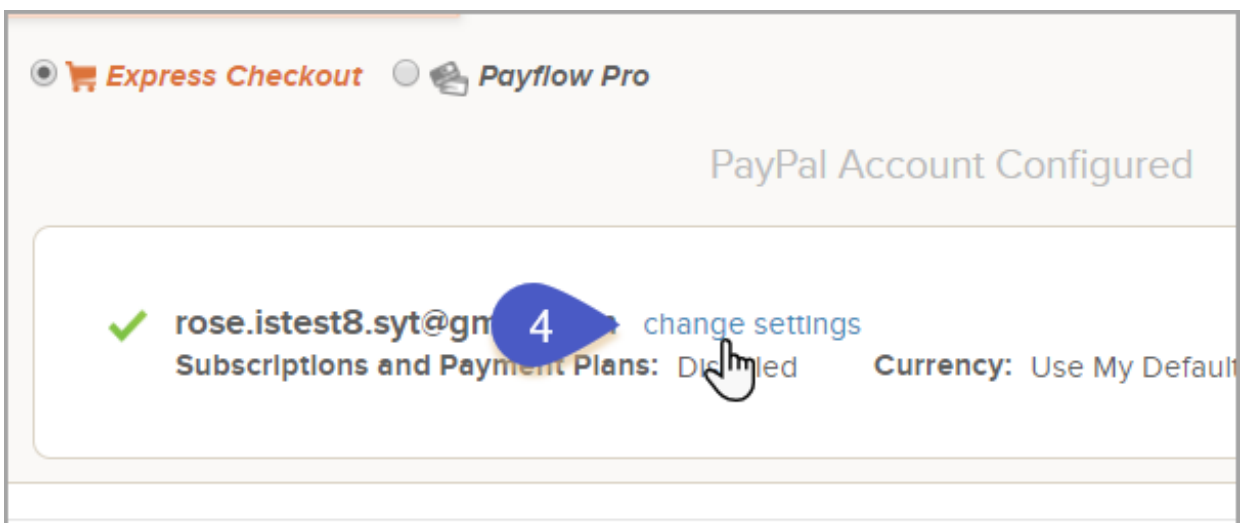
Yes, you need to check the box that you will be using Subscriptions through PayPal. To do this go to

1. E-Commerce Setup > Payment Types



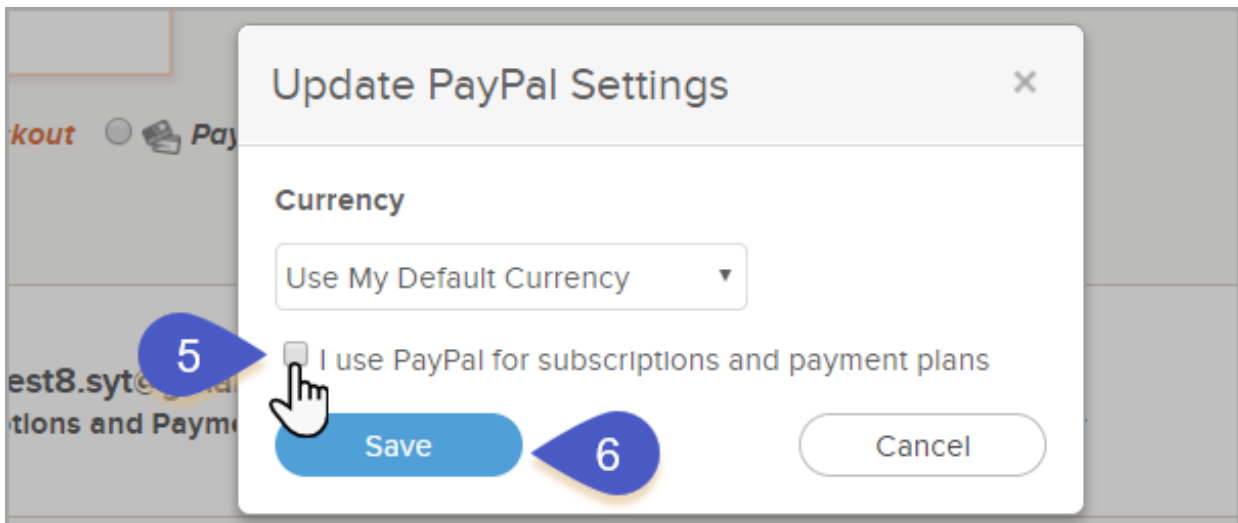
For Express Checkout

2. Click "Change Settings"



3. Check the box next to "I use PayPal for subscriptions and payment plans"

4. Click Save



For PayFlow Pro

Check box next to "I use PayPal for subscriptions and payment plans" > Scroll down and click "Save"

A screenshot of a web application showing the PayPal integration settings page. At the top, the "PayPal" logo is checked and highlighted with an orange box. Below it, there are radio buttons for "Express Checkout" and "Payflow Pro", with "Payflow Pro" selected. Under the heading "Where do I find my credentials?", there are input fields for "User", "Vendor", "Partner", and "Password". Below these is a "Currency" section showing "United States Dollar" with a "Change" link. At the bottom, a blue callout bubble with the number "4" points to a checked checkbox labeled "I use PayPal for subscriptions and payment plans".



If **Reference Transactions** has not been enabled by PayPal you will receive this message

