

Braintree/PayPal® account setup guide

It's easy to get set-up with our trusted partner and the world's largest payment provider, PayPal/Braintree. Once your business is connected, you can start accepting online payments and mobile quickpay. It may take 3-5 business days to establish your new Braintree/PayPal account.

Choose the process that describes you.

1

Login using your
Existing Braintree Account

2

Login by creating a
**New Account, No existing
Braintree Account**

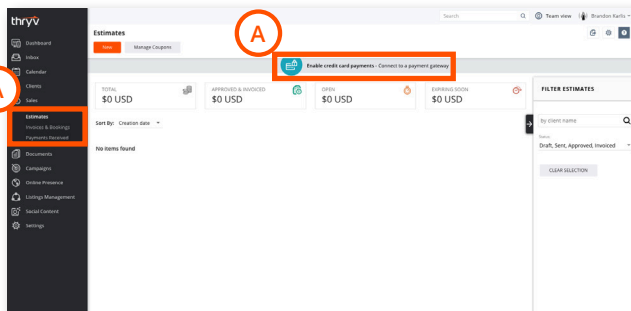
Contact Info: [833.80.THRyv](tel:833.80.THRyv) (833.808.4798), Monday - Friday, 7 a.m. to 7 p.m. CT

- Press 1 for existing Braintree account or if you have submitted an application
- Press 2 for New Braintree account, then press 2 when prompted (Notify agent you are establishing a Thryv account with Braintree).
- Press 3 to speak to a Thryv Service Expert

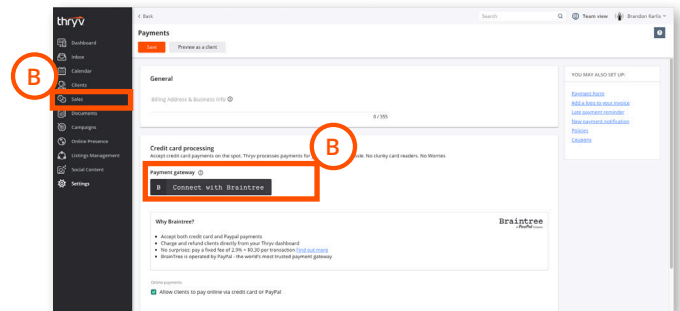
Process 1: Braintree Authorization if you Login using your Existing Account

1 Login to Thryv: Click on Home OR Sales

A. Home: Select Dashboard, then select Black button: Connect with Braintree

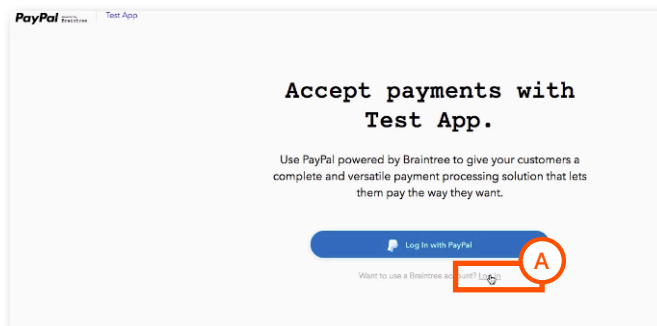


B. Sales: Top of page select Gray button: Connect with Braintree



2 Accept payments with Test App:

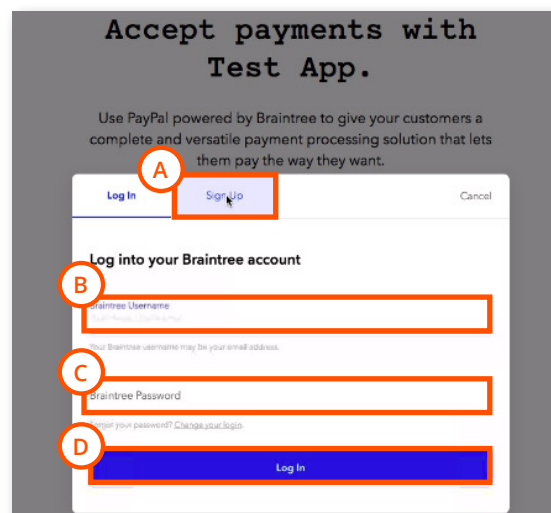
A. Click on Log In for Braintree account (Not PayPal). Braintree is free, PayPal is not.



3 Sign Up:

Please fill out the following information:

- Click Sign Up
- Enter your Username
- Enter your Password
- Click Login



4 Your Information: Please fill out the following information:

- A. First name; Last name, Birthday, Phone, Social Security Number, Home Address
- B. Once finished inserting your information click Next Step: Business

Your Information

Your identity will be verified by answering a few questions before proceeding to the next step. All fields are required.

A

First Name	Last Name	Birthdate
Phone	(201) 555-0123	Social Security
Required for identity verification and credit check.		
Home Address		

B Next Step: Business

[Finish Later](#)

5 Your Business: Please fill out the following information:

Your Business

We like to know what products and services our merchants offer. These details will help us understand how to best facilitate your business.

A

Industry Retail/Physical Goods	Business Type	Established On
Business Name Mike's Plumbing	Legal Name Mike's Plumbing	
Phone USA +1 (201) 555-0123	Website	
Business Description <small>Learn more about permitted use of Braintree services in the Acceptable Use Policy.</small>		
Street Address	Line 2	
Postal Code	City or Town	State

B Next Step: Processing

[Finish Later](#) [Previous Step](#)

- A. Industry, Business Type, Established On Date, Business Name, Legal Name, Phone, Website, Tax Identification, Business Description and Business Address

- B. Click Next Step: Processing Button

6 Processing Information: Please fill out the following information.

- A. Subscriptions, Projected Annual Credit and/or Debit Card Volume, Average Transaction, Largest Transaction
- B. Once finished inserting your information click Next Step: Delivery

7 Delivery Details: Please fill out the following information.

- A. When do you charge? *(Select One)*
- B. When do you deliver? *(Select One)*
 Subscription Breakdown: *(Need to get to 100/100%)*
 - Monthly
 - Quarterly
 - Semi-annual
 - Annually
- C. Click Next Step: Funding

8 **Banking Information:** Please fill out the following information.

- A. Routing Number and Account Number
- B. Once finished inserting your information click Next Step: PayPal

Banking Information

Most banks will present your routing and account numbers when you sign into your account.

A

Routing Number

Account Number

The account submitted must be a checking account. Savings, deposit-only, and prepaid debit accounts will not be funded by Braintree.

Finish Later

Previous Step **B** Next Step: PayPal

9 **Link with PayPal:**

- A. Click Last Step: Authorize

Link with PayPal

Accept payments with major credit cards and PayPal Checkout on your Test App site.

Your PayPal Account

test@paypal.com ✓

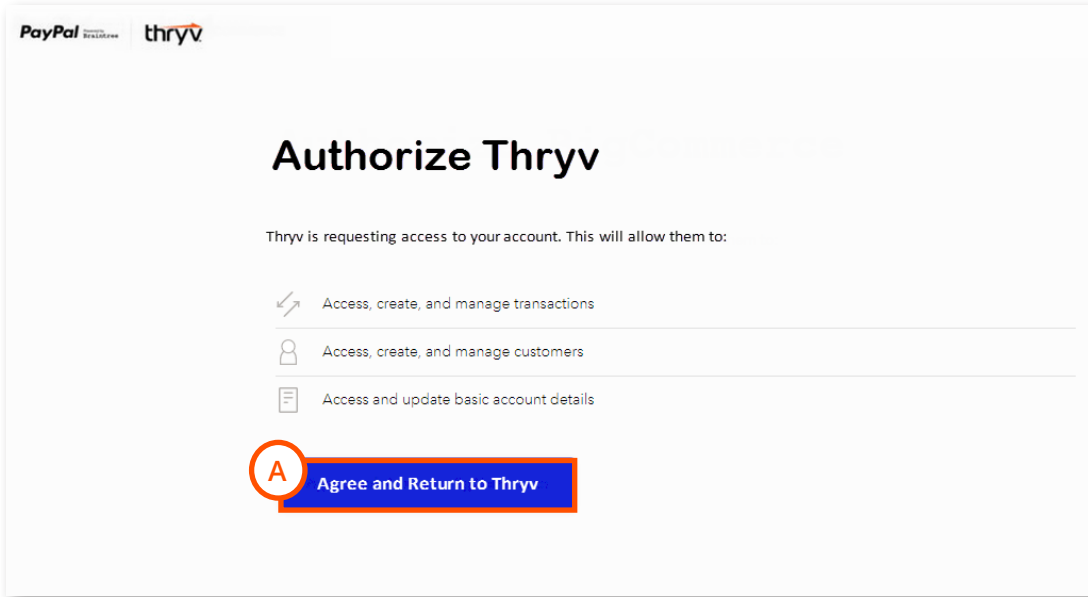
To ensure PayPal Checkout is available for your Test App site, please confirm your email address with PayPal.

Finish Later

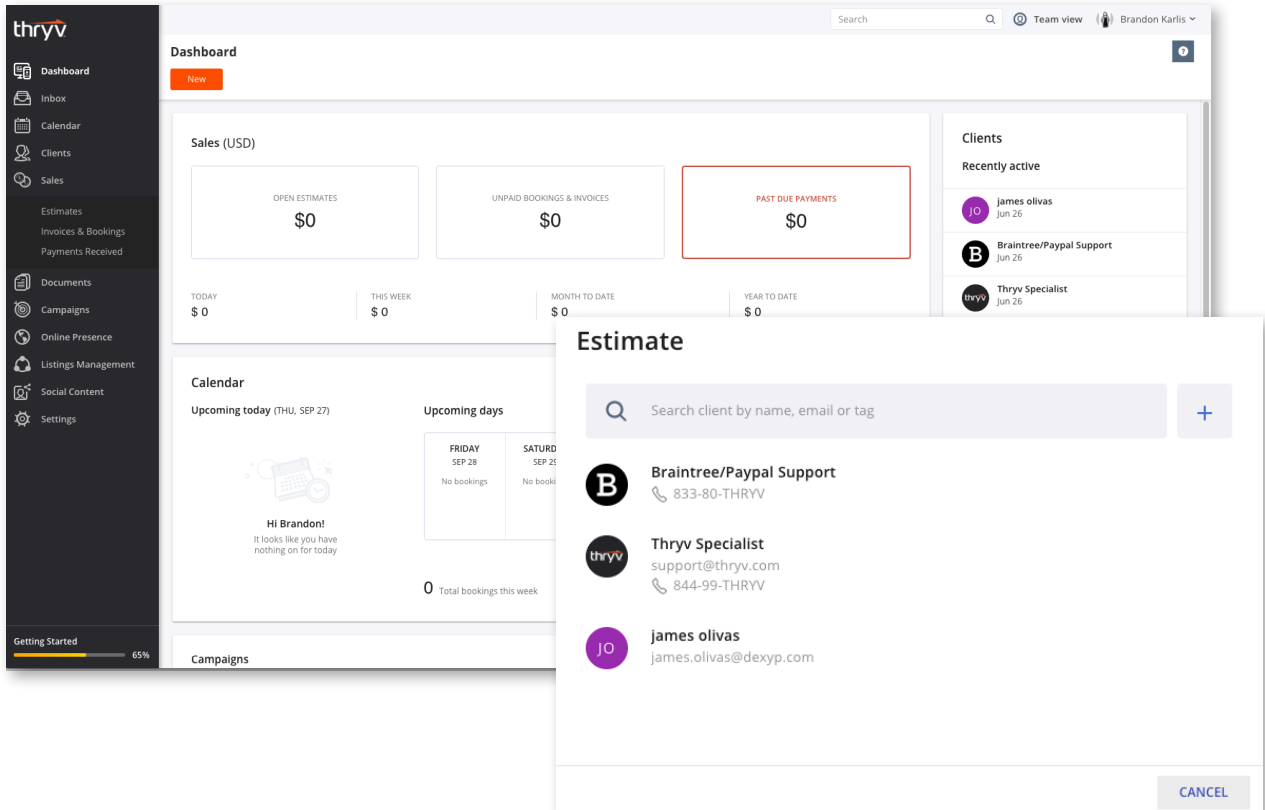
Previous Step **A** Last Step: Authorize

10 Authorize Test App:

A. Click Agree and Return to Thryv



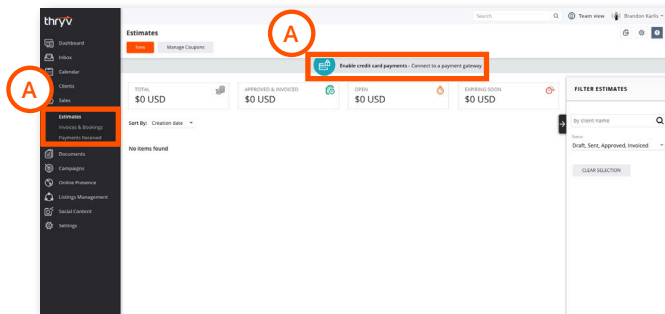
11 Redirected to Thryv:



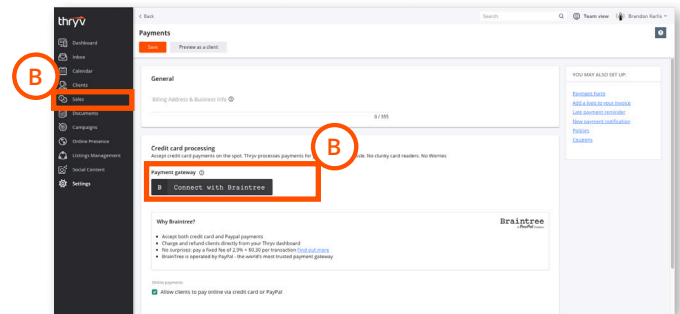
Process 2: Braintree Authorization - New Account, NO Existing Account

1 Login to Thryv: Click on Home or Sales

A. Home: Select Dashboard, then select Black button: Connect with Braintree

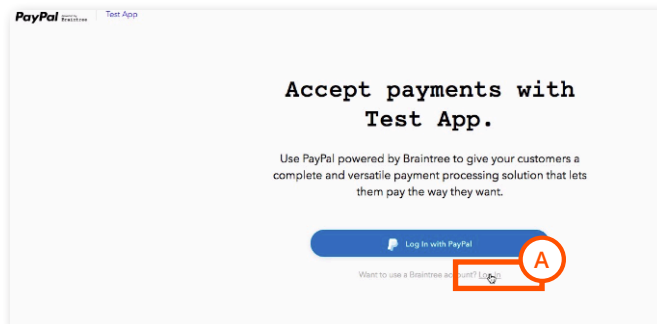


B. Sales: Top of page select Gray button: Connect with Braintree



2 Accept payments with Test App:

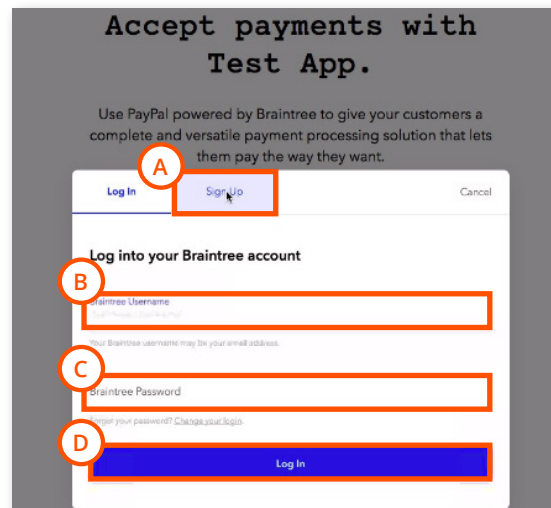
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Street Address	Line 2	
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B Next Step: Processing

Finish Later

Previous Step

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- A. Click Last Step: Authorize

Link with PayPal

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Your PayPal Account

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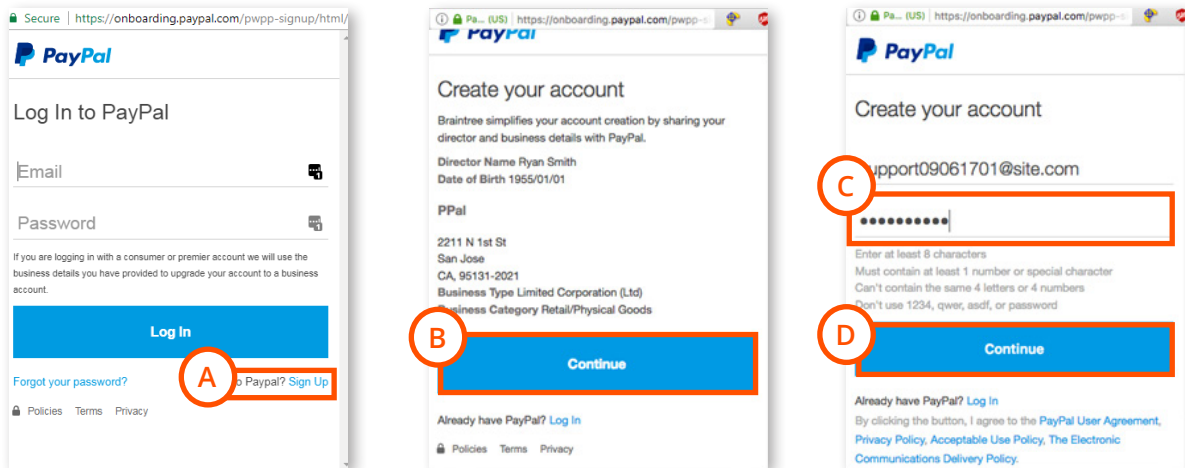
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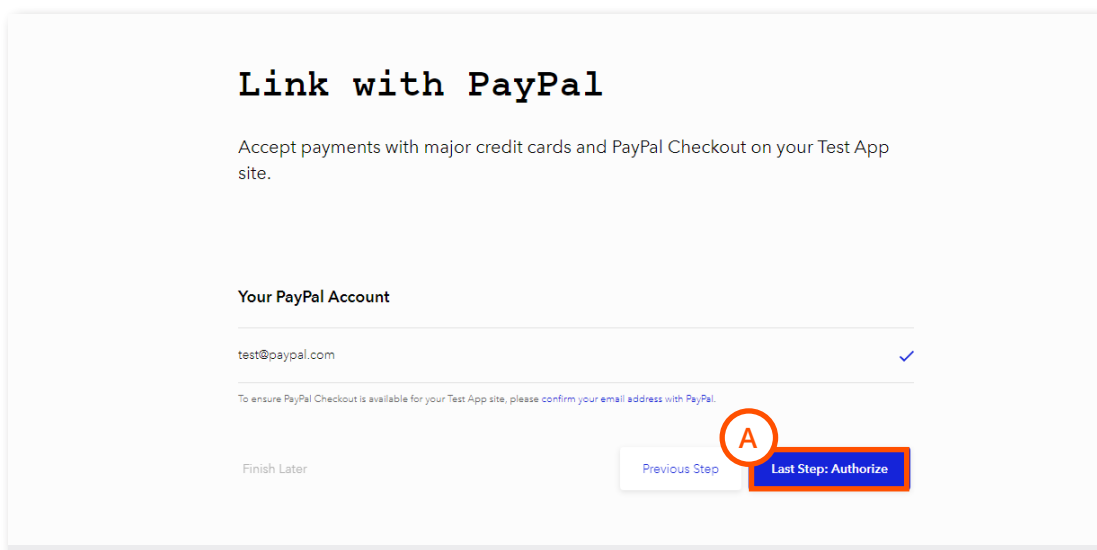
10 Authorize Test App:

- A. Click Sign up
- B. When Prompted, Click Continue
- C. When prompted create password
- D. Click Continue



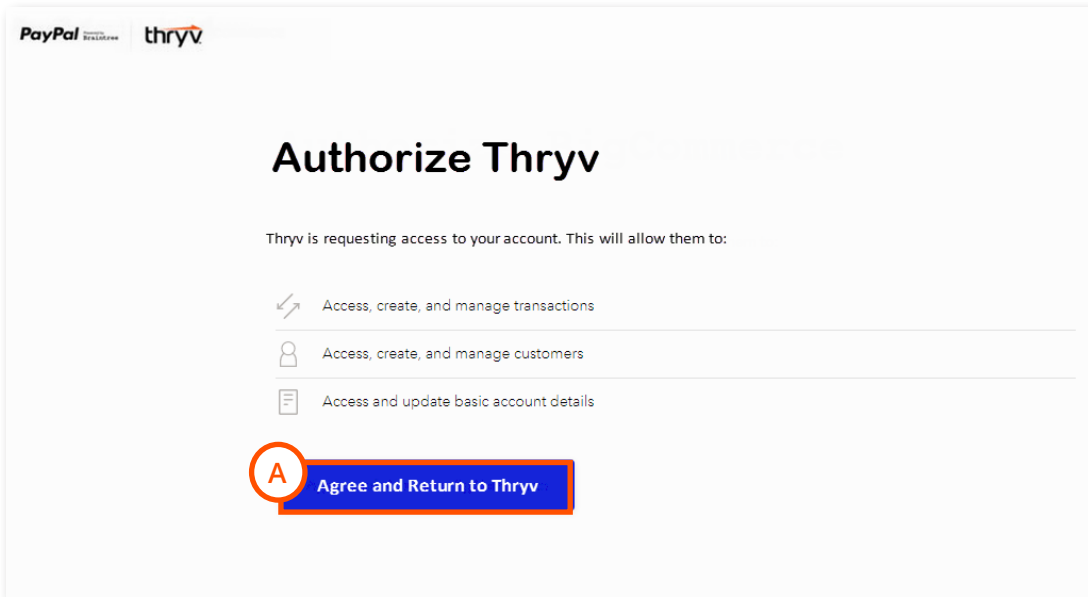
11 Link with PayPal:

- A. Click Last Step: Authorize



12 Authorize Test App:

A. Click Agree and Return to Thryv



13 Redirected to Thryv:

