

A quick reference guide for the SimplePort “Account Interview” option:

Please take a few minutes to complete this simple interview so our service team can start building your account settings.

Step 1: Business Information Step 2: PayPal Data Step 3: QuickBooks Lists Step 4: Finishing Touches

Please tell us a little about your business

Merchant account date format	<input type="text" value="MM/DD/YYYY"/>	← Complete these fields, modify default settings as necessary
QB date format	<input type="text" value="MM/DD/YYYY"/>	
QB Currency	<input type="text" value="USD"/>	
Sales Tax Enabled	<input type="text" value="Yes"/>	
Business Country	<input type="text" value="United States"/>	
Business Location	<input type="text" value="CA"/>	

Click Next link or Step 2 link

Next

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Download sample PayPal data

To download the PayPal transaction file in the correct format you need to:

1. Setup the PayPal field customizations: [Read this FAQ article](#), or [watch this video](#)
2. Download your PayPal data: [Read this FAQ article](#), or [watch this video](#), Link to PayPal data > [PayPal Website](#)
3. Upload PayPal Data File

PayPal Tab Delimited All Activity .TXT download file

No file chosen

Required

First Back

First, upload your PayPal data file, be sure to set the one-time PayPal field customizations for this file

Next

Click Next link or Step 3 link



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Step 1: Business Information Step 2: PayPal Data **Step 3: QuickBooks Lists** Step 4: Finishing Touches

Export your QB chart of accounts and item lists

To export the Chart of Accounts and Item List:

1. Click the File button on the QuickBooks toolbar
2. Click Utilities > Export > Lists to IIF Files
3. In the QB EXPORT window check the boxes next to Chart of Accounts and Item List > click the OK button
4. Save the file as CoAltem.IIF to your desktop

Or watch this video: [QB Lists Export](#) which walks you through these steps

4. Upload CoAltem.IIF No file chosen
QuickBooks Export Lists .IIF File Required

[First](#) [Back](#) [Next](#)

First, upload your QuickBooks Chart of Accounts and Item list iif export file

Click Next link or Step 3 link

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A few final details before we are finished

Do you have more than one merchant account? Select option if you have more than one PayPal merchant account

Any questions or hints for us about your business?
Tell us anything more about this account setting, this is a free-form text entry field

[Click to read EUL Terms and Conditions](#)
Simpleport End User License Agreement I agree with the Terms and Conditions.

[First](#) [Back](#)

Click checkbox.

Click the SUBMIT button to send us the new account setting information.
We will build the new settings and let you know when it is complete.

