# Keap Payments UK Dashboard 🗞

# Home Page

When you first sign in to your dashboard, you will see three information boxes on the middle of the page:

⊲ wepay				UK Test -
Main	Recent Activity			0
A Home al Reporting O Settings				When will I get my money? The settlement amount typically appears in your bank account 2-5 days sitter the transfer is initiated.
tep	£0.00 Last Settlement	£0.00 Net Balance	N/A Next Settlement Next Settlement: N/A	How much money will I receive? Your available balance as of 2:30pm GM/T will be sent to your bank account the next day.
			More Detail	Why isn't my balance fully available? A few reasons why your
	Data From/To	Status	Amount	balance isn't fully available: 1. One or more payments have not been fully processed 2. Your bank account was not confirmed 3. There are reserves on the account

- Last Settlement: If there is a value listed here, it will also give a date as well.
- Net balance: This will show the current account balance.
- Next settlement: This may be different than the Net Balance depending on a few things.

If you would like to view more detailed information (such as fees and other information) click the **More Details** button on the page to gain some additional insight.

### Reporting

Click on the **Reporting** tab to access Payments and Settlements reporting.

	Payments Settlem	ents		
A Home	From	Until Apph	e	Download C
al Reporting			-	
O Settings	Send time +	From/To	Status	Amount
Security	Feb 24, 2016	Refund to Bob Smith	Complete	-£15.48
L Help	Feb 24, 2016	Payment from Bob Smith	Refunded	£15.48
	Feb 24, 2016	Settlement from UK payment account	Pending	£139.61
	Feb 24, 2016	Payment from Bob Smith	Complete	£111.89
	Feb 24, 2016	Payment from Bob Smith	Complete	£20.58
	Feb 24, 2016	Payment from Bob Smith	Complete	£10.39

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# Payments

Under the Payments tab, we provide both the payment details and the receipt on the same page.

	Payments Settlements			
A Home				0
al Reporting		Payment Details	Back to Payments	Why can't I see my
O Settings				payments?
Security		From	Bob Smith	Make sure you have selected the correct date range. If any
L Help		То	UK payment account	payments have been made in the past they will show up in
		Payment ID	968	the table irrespective to the data races
		Amount	£109.61	
		Fee	62.28	How do I get more details about a payment?
		Date	Feb 24, 2016 10:41:14	Each row is clickable and will lead up to a page with more
			Issue Refund	details about the payment.
			1000000	download button to save a
				CSV file to your computer with more information about
		Receipt		each payment.
		Receipt of	of Payment	What does the "Issue Refund" button do?
		Payment Method Paid on Amount	Vita xxxxxx4018 Feb 24, 2016 10:41:14 C109 64	The "Issue Refund" button gives you the option to provide a full refund to the
		Fee	(2.28	payer including any service fees.

# Refunds

Each payment will give you the ability to issue a refund. The refund option will be available for 90 days from the date of the transaction. If your account does not have a balance to support the refund amount request, you will be presented with a screen that will allow you to make the refund by entering in a debit (not credit) card for the payment.

Paymer	Settlements		
A Home			0
al Reporting	Payment Details	Back to Payments	100
Settings			payments?
A Security	From	Bob Smith	Make sure you have select
<ul> <li>accuracy</li> </ul>	То	UK payment account	payments have been mad
✓ Help	Payment ID	968	the past, they will show u the table irrespective to t
	Amount	£109.61	date range.
	Fee	£2.28	How do I get more details
	Date	Feb 24, 2016 10:41:14	Each row is clickable and
			lead you to a page with m details about the payment
			You can also use the
	Confirm Refund		download button to save CSV file to your compute with more information ab each payment.
	Are you sure you want	to refund this payment?	What does the "Issue
	Bob Smith will receive a	a full refund of £111.89	Refund" button do?
		Confirm Cancel	The "Issue Refund" butto gives you the option to provide a full refund to th
and the second			payer including any service frees

### Settlements

This section provides you access to a list of all your withdrawals. You can look for a specific one by changing your date range and applying the changes.

	Payments Settlements				
A Home					•
al Reporting	From	Appy			Why can't I see my
• Settings	Settlement ID	Send time 4	Amount	Status	settlements?
A Security	6522466	Feb 24, 2016 10:43:00	£139.61	Started	the correct date range. If any
C Help					the past, they will show up in the table invested the to the
					date range.

# Account Info

Click the **Settings** tab to view your account information. Here, you'll see the account name you're viewing as well as the application that it's tied to.

⊲ wepay			UK Test +
Main ♠ Home _al Reporting	Account Info Account Details Account Name: Application:	Delete UK Test WeCrowd	O Where did you obtain my contact information from? When you signed up to rain
Settings     Security     Listels	Contact Information	530 High Street	account with our partner, the contact information that you provided was used to activate your account.
	Phone:	Westbury, 44123456709	If I have more than one account, how do I view my other accounts? A list of your accounts can be found on the top right side of the page. Use the drop down memo to move between your accounts.

### Settlement Bank

On the **Settlement Bank** tab, you have the ability to modify your linked bank account as well as your withdrawal frequency. If you haven't linked your bank account, you'll be prompted with an **Update** button.

<) wepay		UK Test +
Main  Home A Home A Reporting  Security  Hain	Account Info Settlement Bank Delete Link Your Bank Account Please update your personal information before adding your settlement bank. Update	O Why do I need to add my bank account? In order to receive the proceeds of your sales, you will need to provide your bank account information.
		Where can I find my account number? Your account number? Your account number can be found at the top of your bank statement, on the tont of your debit cark, or along the bottom of your cheques. What is a transfer period? A transfer period is how often you'd like to be able to withdraw your money. You have a choice among: Daily - end of every day
		Weekly - Monday of every week Monthly - 1st of the month

When updating your settlement bank information, you will be asked to enter your

account number twice to help to ensure that accidental mistypes are minimized. UK bank accounts are typically denoted by a routing number called a 'sort code' which is six digits split into three groups (i.e. 20-30-40) and an account number that can be between 6 and 9 digits and can begin with zeros. You can find this information on the card itself as well.

<) wepay					UK Test +
Main	Account into	Settlement Bank	Celete		0
Main  Ali Home  Ali Reporting  Settings  Security  Help	Link Your Bank	Account Sort Code: Account Number: Confirm Account Number: Bank Name: How often Daily	12:34-56 12:34:5678 12:34:5678 Bank Name thould we send your money?	Add Bank Cancel	O Why do I need to add my bank account? In order to receive the proceeds of yoor sales, you allow you bank account information. Where can I find my account number? Your account number can be found at the top of your bank at the top of your bank account number? What is a transfer period? What is a transfer period? Mitid is to be able to you'd like to be able to y

#### Delete

Clicking on the **Delete tab** will provide you access to the **Delete Account** option.



**Warning!** It's important to note that while you can click the **Delete Account** button, you will be allowed to proceed even if there are funds pending withdrawal. If you should choose to delete, you will be prompted with an additional level of verification. You will need to re-enter your account password and confirm "Yes! Delete it" to complete the action.

# Security

Under **Security**, you will find the email and password associated with the account. You can update your password in this section.

<) wepay			UK Test -
Main  Home Home Reporting Security Help	identity Email: Old Password: New Password: Confirm Password:	nehaw+20160201a@wepay.com Old Password New Password Confirm Password Update Cancel	UK Test - O How do I reset my password? To change Password button and input your correct password as well as your new password. What if I don't remember my password? To reset the password for your account, click on the following this and enter in your event of word.
L Hep	Confirm Password:	Confirm Password Update Cancel	What if I don't remember m password. What if I don't remember m password? To reset the password for your account, click on the following link and enter in you email address: You will receive a password reset email in your inbox. If you don't nocive the aparts holder or add trusted senders list.

# More Questions?

- The primary Keap Payments FAQ which can be found here .
- The Keap Payments UK FAQ can be found here .