

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:

The screenshot shows the Keap Payments UK Dashboard Home Page. The dashboard features a sidebar on the left with navigation options: Main, Home (selected), Reporting, Settings, Security, and Help. The main content area is titled 'Recent Activity' and displays three summary cards:

- Last Settlement:** £0.00
- Net Balance:** £0.00
- Next Settlement:** N/A

Below these cards is a table with columns: Date, From/To, Status, and Amount. A 'More Detail' button is located to the right of the table. On the right side of the dashboard, there are three informational sections:

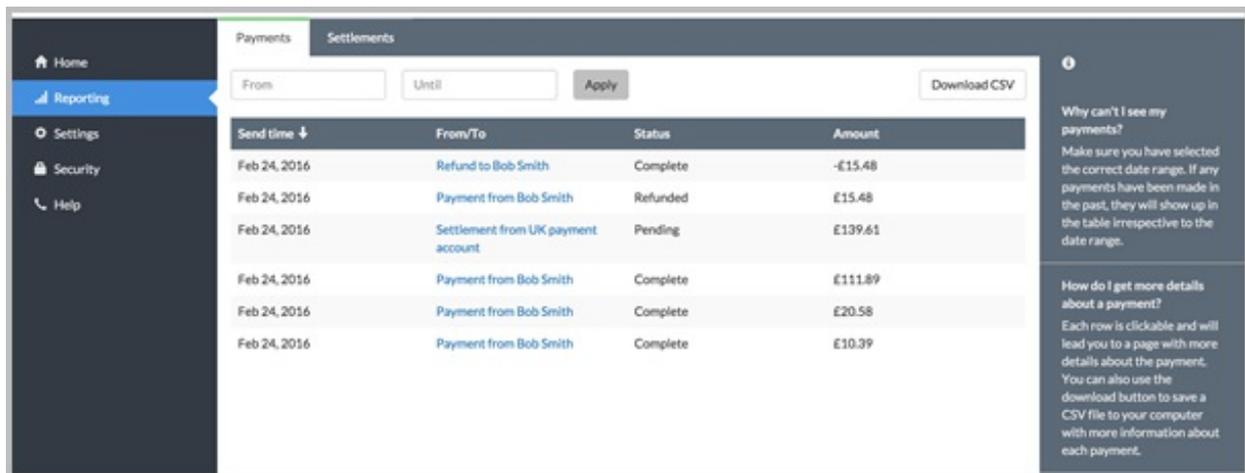
- When will I get my money?** The settlement amount typically appears in your bank account 2-5 days after the transfer is initiated.
- How much money will I receive?** Your available balance as of 2:30pm GMT will be sent to your bank account the next day.
- Why isn't my balance fully available?** A few reasons why your 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.

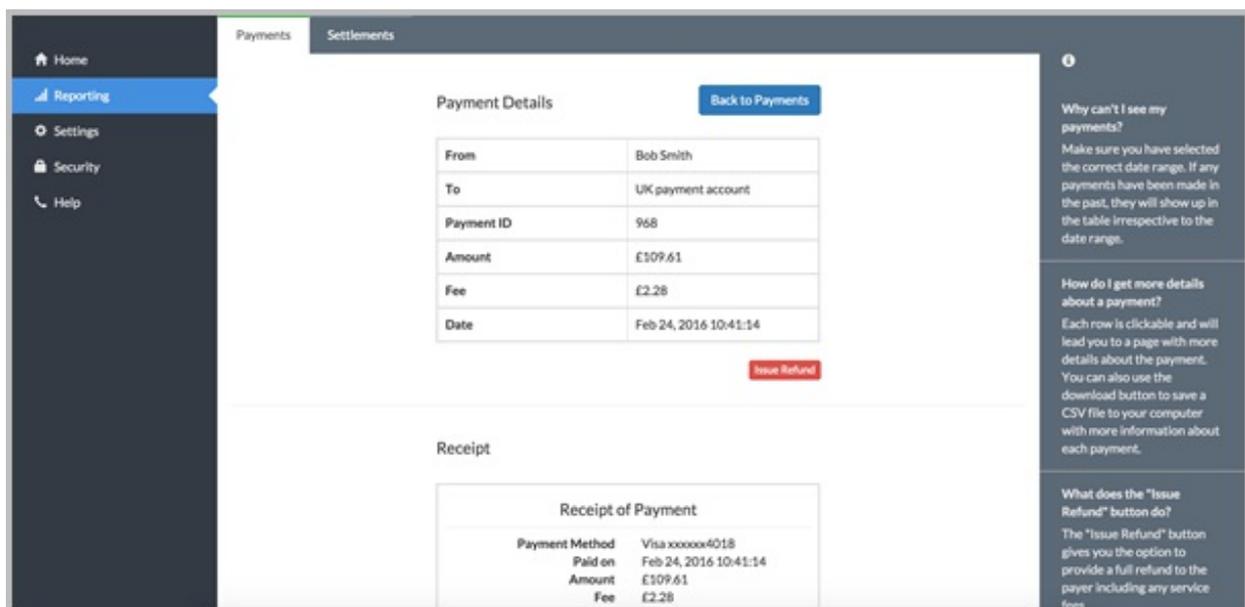
Reporting

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



Payments

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



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.

Payments Settlements

Home Reporting Settings Security Help

Payment Details [Back to Payments](#)

From	Bob Smith
To	UK payment account
Payment ID	968
Amount	£109.61
Fee	£2.28
Date	Feb 24, 2016 10:41:14

Confirm Refund

Are you sure you want to refund this payment?

Bob Smith will receive a full refund of £111.89

[Confirm](#) [Cancel](#)

Why can't I see my payments?
Make sure you have selected the correct date range. If any payments have been made in the past, they will show up in the table irrespective to the date range.

How do I get more details about a payment?
Each row is clickable and will lead you to a page with more details about the payment. You can also use the download button to save a CSV file to your computer with more information about each payment.

What does the "Issue Refund" button do?
The "Issue Refund" button gives you the option to provide a full refund to the payer including any service fees.

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

Home Reporting Settings Security Help

From Until [Apply](#)

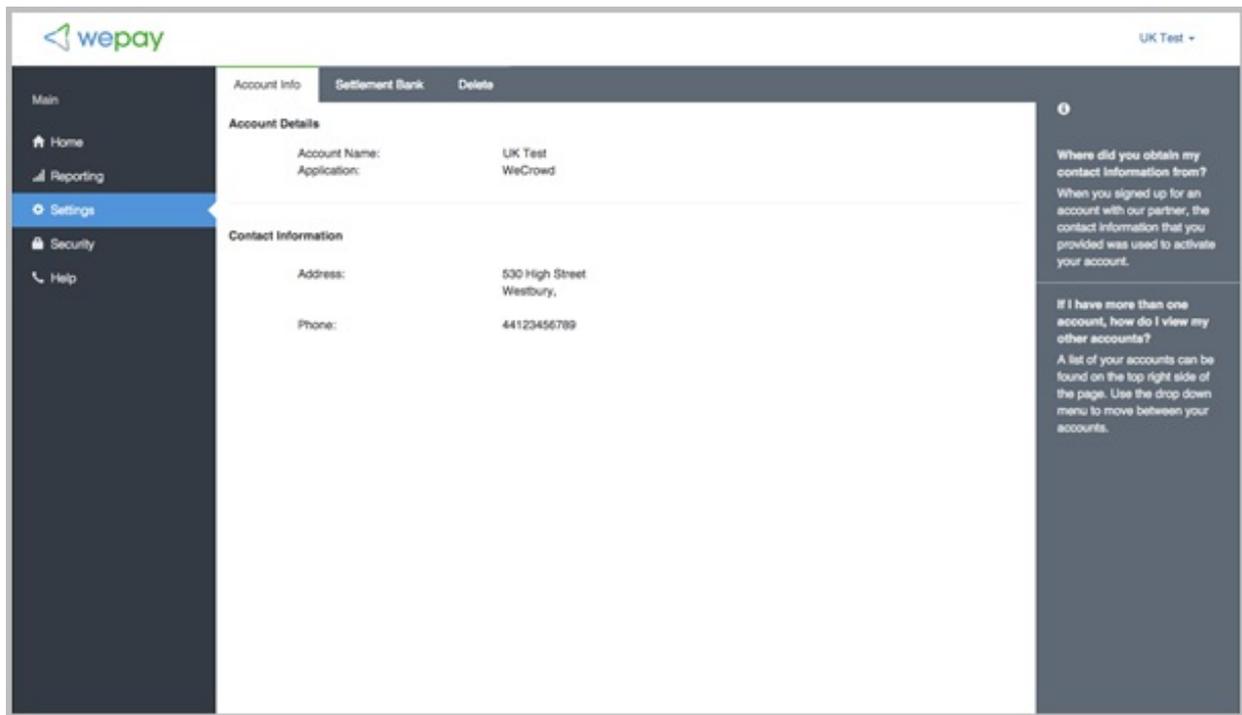
Settlement ID	Send time ↓	Amount	Status
6522466	Feb 24, 2016 10:43:00	£139.61	Started

Why can't I see my settlements?
Make sure you have selected the correct date range. If any payments have been made in the past, they will show up in the table irrespective to the date range.

How do I get more details about a settlement?
Each row is clickable and will lead you to a page with more details about the settlement. You can also use the download button to save a CSV file to your computer with more information about each settlement.

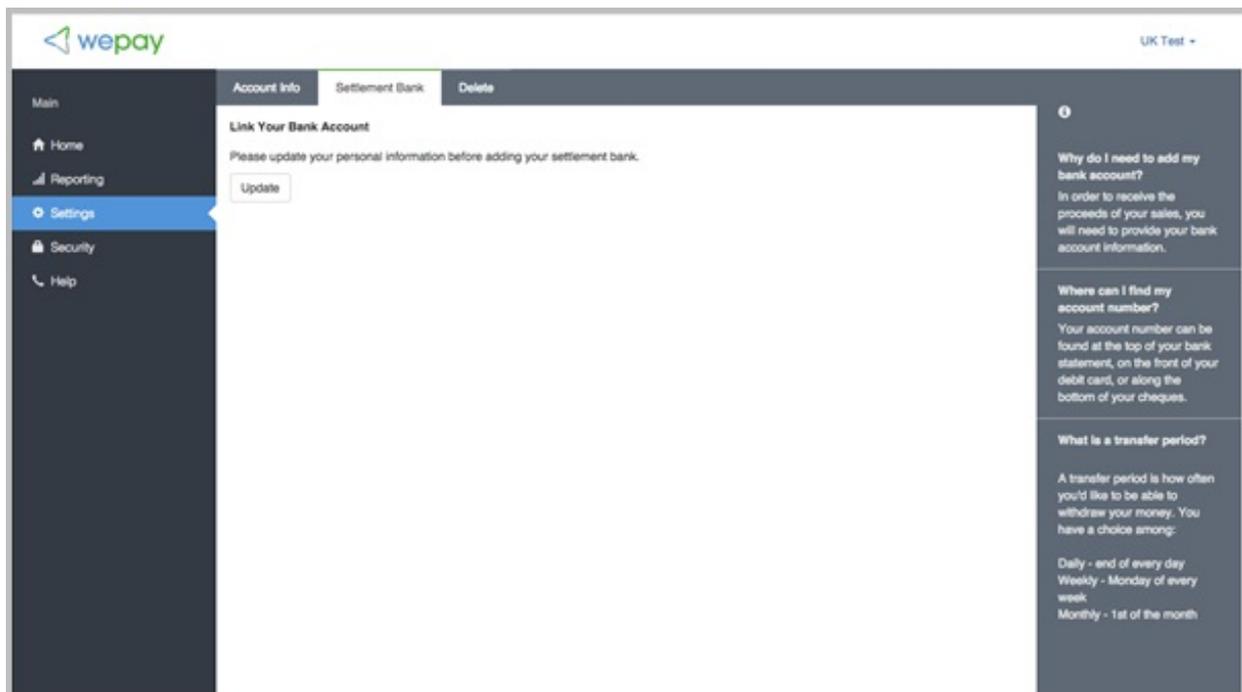
Account Info

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.



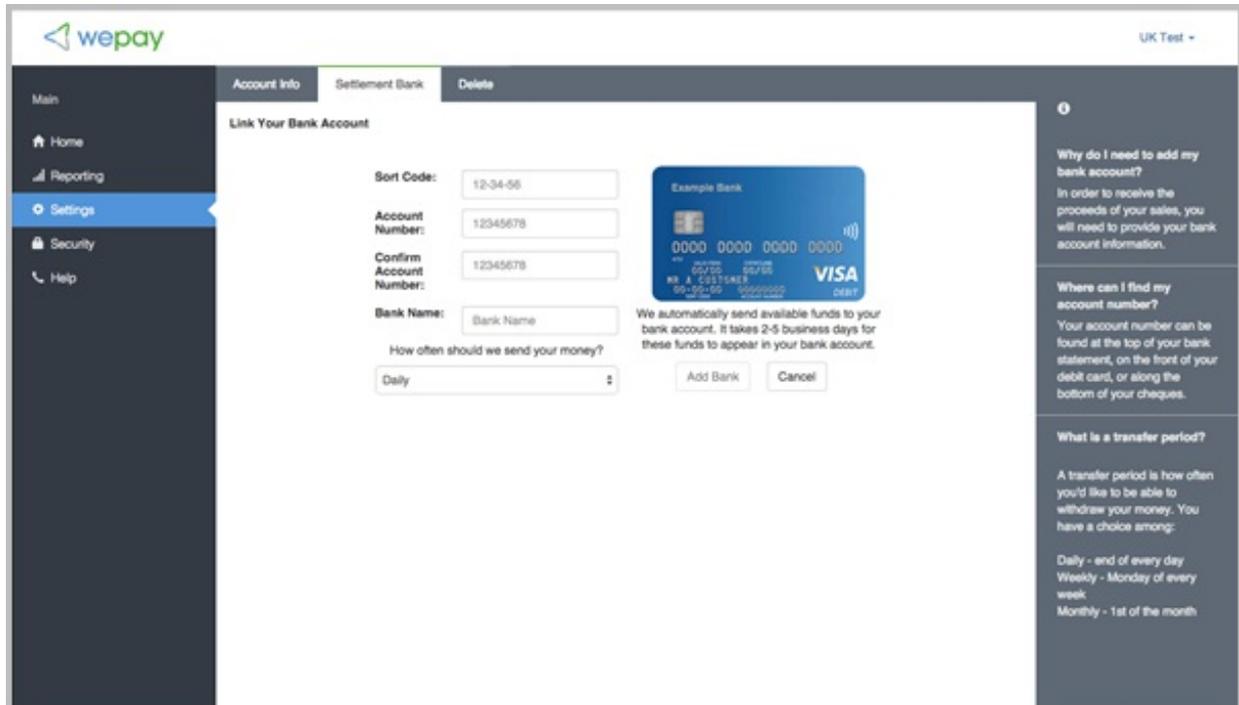
Settlement Bank

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.



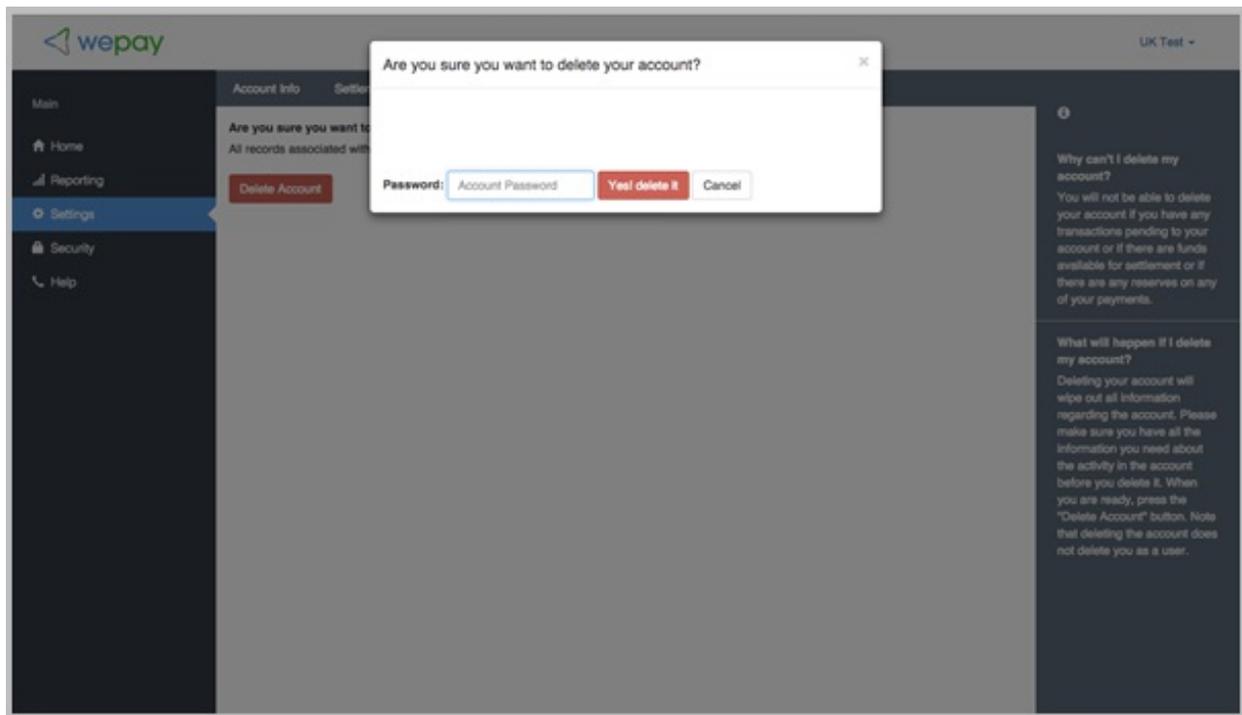
When updating your settlement bank information, you will be asked to enter your

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.



Delete

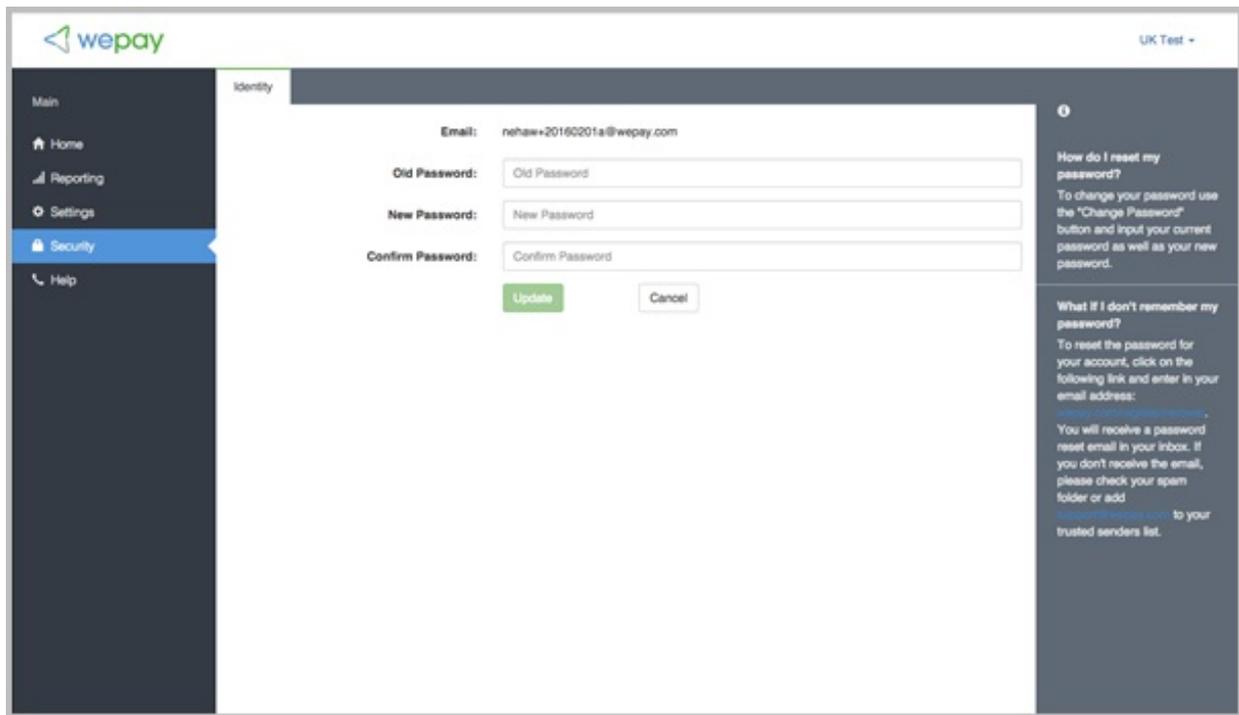
Clicking on the **Delete tab** will provide you access to the **Delete Account** option.



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.



More Questions?

- The primary Keap Payments FAQ which can be found [here](#) .
 - The Keap Payments UK FAQ can be found [here](#) .
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