Keap Pay - Deposits

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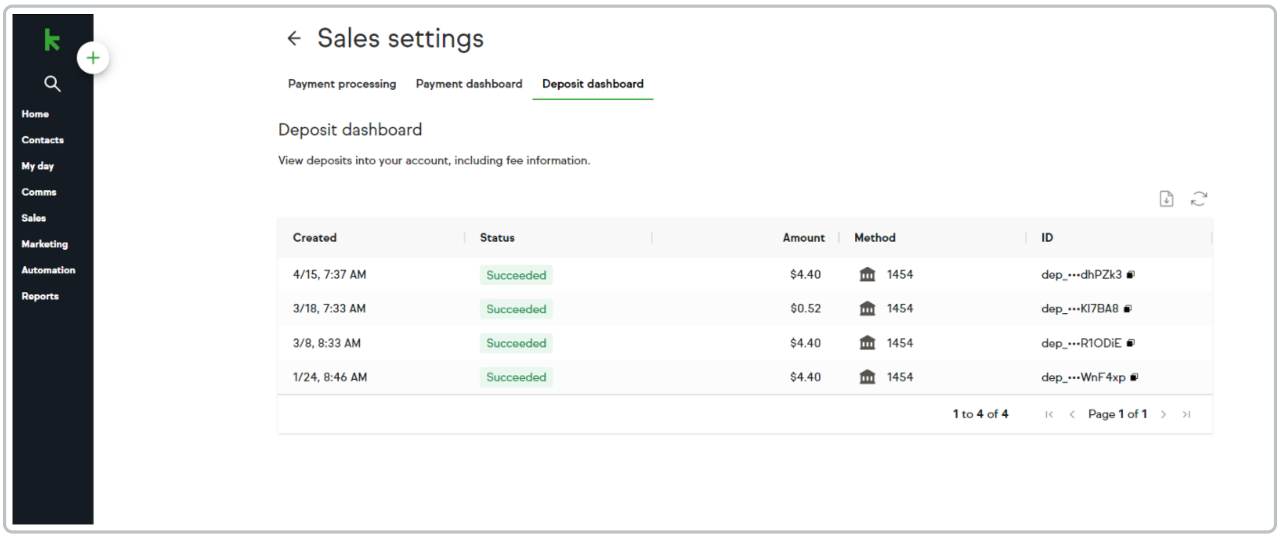
Tags: Keap-Pro Keap-Max Max-Classic

Keap Pay is Keap's very own payment solution that helps businesses streamline the payment experience for their customers, obtain clearer financial business insights and follow the entire customer journey directly within their Keap App. Plus, with Keap Pay's concierge support, businesses will be able to handle all of their payment needs directly with Keap. No more logging in and out of different software to piece together your customer journey.

Deposit Dashboard

Keap Pay's embedded Deposit Dashboard will allow you to see your Deposits in real time. What payments made up those Deposits, Export a CSV of the Payments that made up a Deposit, and Deposit IDs if support help is required.

NOTE: Keap Pay dashboards are only available in **Keap Pro/Max and Keap Ultimate**. If you're currently using the Keap Max Classic interface, you must toggle to Keap Ultimate in order to access the dashboards.



Items on the Dashboard:

- Date the Deposit was created
- Status of Deposit
- Deposit Amount
- Method of Deposit (What Bank account was it sent to)
- Deposit ID

To Access

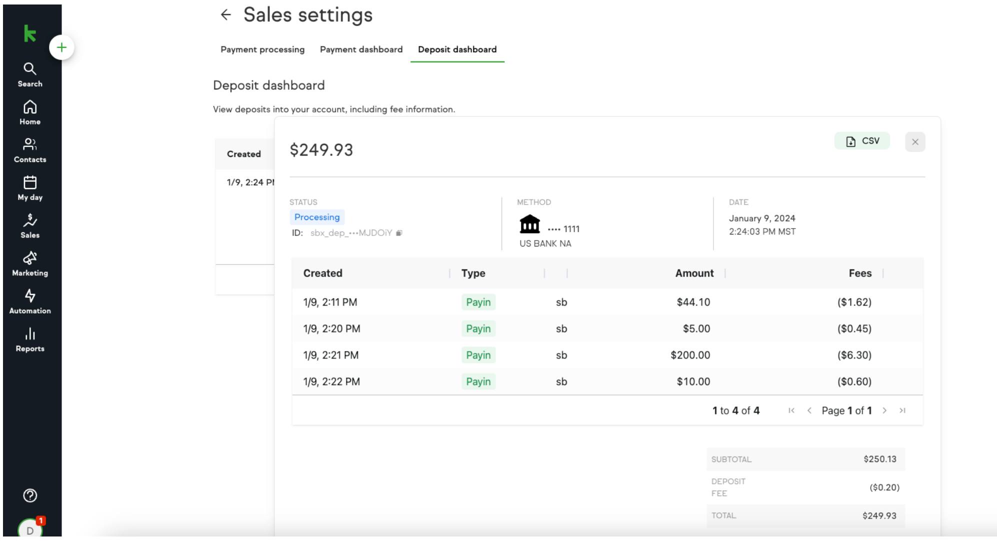
1. Navigate to Sales
2. Under Related Shortcuts you will see Deposit Dashboard

Seeing What Payments Make Up a Deposit

When on the Deposit Dashboard you can click on any individual Deposit and a pop up will appear showing a list of each payment that make up that deposit. This list will show the following about each payment in that deposit

- Date the Payment was created
- Type of Transaction
- Payment ID
- Payment Amount
- Fees

- Net after Fees



NOTE the total deposited will also include any/all fees (Deposit, Chargeback, Updater etc).

Sticker Pricing

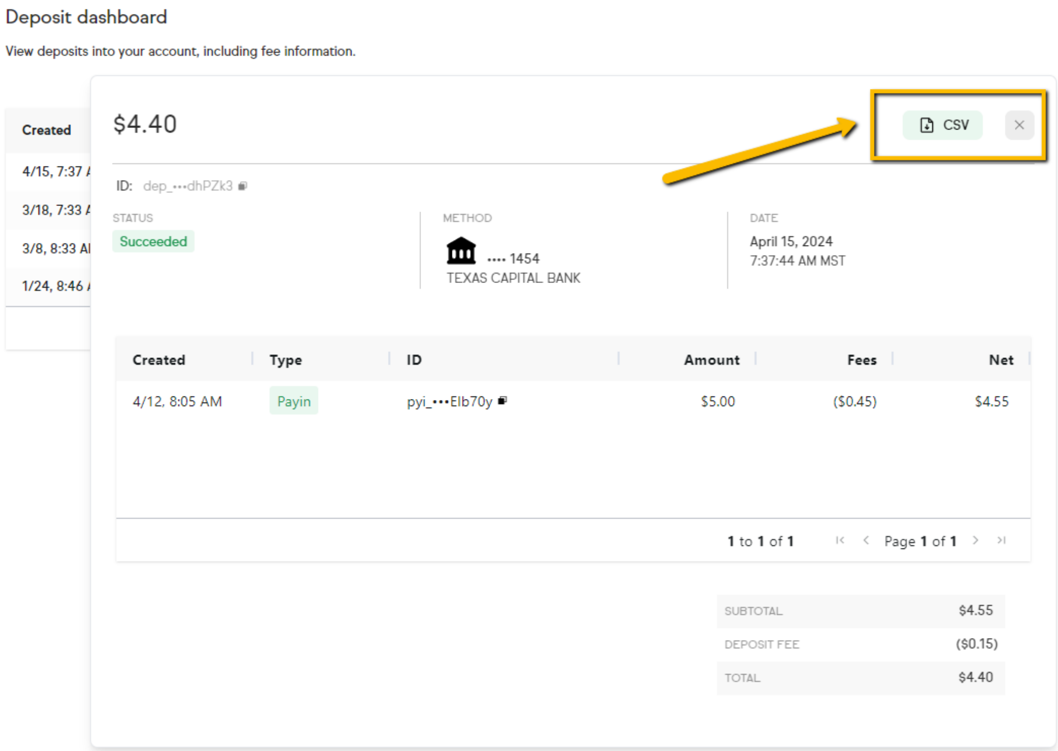
Card Processing Fees - Applies to all credit card payments and refunds	
Card Transaction Volume Fee	2.99%
Card Transaction Per item Fee	$0.30
ACH Processing Fees (Coming Soon) - Applies to All ACH payments and refunds	
ACH Volume Rate	1% up to $10
ACH Transaction Per Item Fee	$0.30
Payout (Deposit) Fees	
Standard ACH Payout (Per batch)	$0.15
Additional Fees	
Account Updater	$0.50
Card/ ACH Refund	$0.30
ACH Return	$15.00
Chargeback (Card or ACH Dispute)	$15.00

Exporting Deposit Reports

There are two ways to export a Deposit report, you can export deposits individually or by exporting all deposits contained in a customer date range.

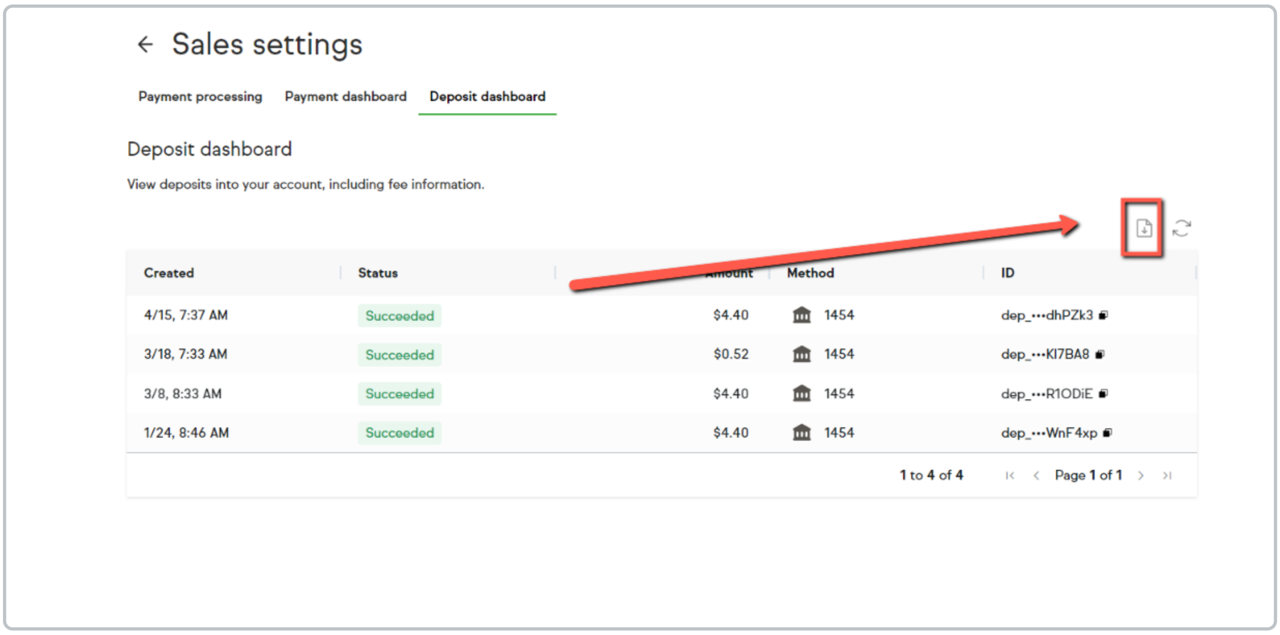
Individual Exporting

When on the Deposit Dashboard you can click on any individual Deposit and a pop up will appear showing all the details that make up that deposit. In the top right hand corner, click the “CSV” button to download the deposit as a CSV file.



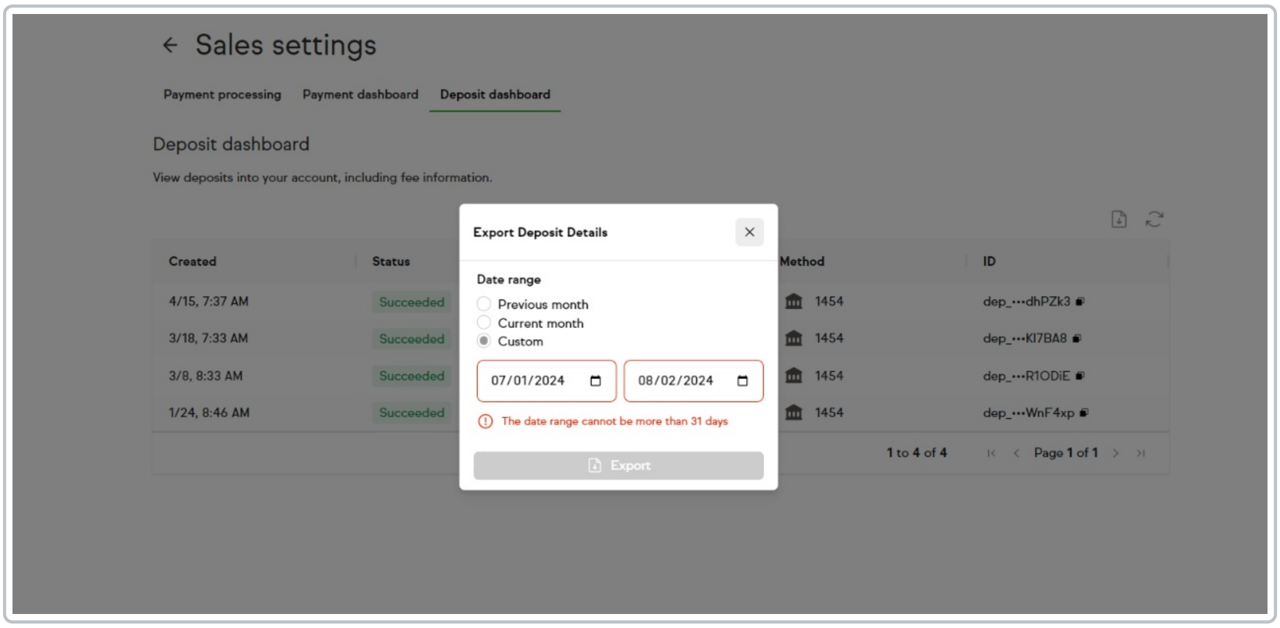
Mass Exporting

When on the Deposits Dashboard, click on the icon in the top right-hand corner and a pop-up will appear. In the pop up you can export deposits from the previous month, current month, or over a custom period of time. Once the date range has been set, click the "Export" button to download the report as a CSV file.



Please note that any filters applied to the deposits dashboard when exporting will be applied and when using a custom time period filter, you can export up to 31 days worth of data at a time.

i.e. exporting the deposits dashboard between 7/01/2024 to 8/01/2024 will work, but 7/01/20024 to 8/02/2024 will not.



Deposit Timing

Deposits are made from the date of the Transaction plus 1 business day for all Card Transactions, and from the date of the Transaction plus 4 business days for all ACH transactions (coming soon). This will be impacted by bank holidays and weekends.

Card Transactions - 11PM ET Cutoff	
Day of Transaction	**Day of Deposit**
Monday	Tuesday
Tuesday	Wednesday
Wednesday	Thursday
Thursday	Friday
Friday	Monday
Saturday	Monday
Sunday	Monday
ACH Transactions - 9PM ET Cutoff (coming soon)	
Day of Transaction	**Day of Deposit**
Monday (Includes Transactions entered on Saturday, Sunday, or Monday)	Friday
Tuesday	Monday
Wednesday	Tuesday
Thursday	Wednesday
Friday	Thursday

FAQ's

Q - Are there any businesses that are prohibited from using Keap Pay?

A - Yes there are some business types that we prohibit from using Keap Pay. Many of these business types are also against our AUP. Here is a comprehensive list of our prohibited businesses for Keap Pay. If you see your business type on this list but you are allowed to send emails via Keap please contact support to see if we can make an exception.

Q - I want to use Keap Pay but I'm looking for a lower rate than what's posted?

A - With Keap Pay we may have some flexibility in our pricing depending on a few factors. If you would like to review please contact your CSM or the payments team using payments@keap.com.

Q - I filled out my Onboarding Form but I'm still not active yet and heard nothing.

A - It can take up to 3 business days for onboarding to complete. Your application may require additional documents or information required for verification, please check your email to see if you received communication from the Payments team using payments@keap.com. If 3 business days have passed and you have not received an email, please contact support.

Q - I got a Payment but I'm not seeing it in my Deposit Report

A - First make sure the payment is in the "succeeded" status. Then check the date of the transaction and compare it to the deposit timing. If it's been past that time and it's showing the "succeeded" status, please contact support.

Q - I got a Deposit but its not in my bank account

A - First make sure the Deposit is in the "succeeded" status. If the deposit was made less than 1 business day ago, please allow for that time to pass. Then connect with your bank to see if there is any block on their end. If the deposit payment is still not showing, please contact support.

Q - How do I update the Business Information for my Keap Pay Account

A - If there is a change in your business ownership, name, address, or tax IDs please reach out to the payments team right away using payments@keap.com and we can get those updates done for you.

NOTE updating your business information may require a new application to be submitted, this is subjected to the information needing to be updated.

Q - How do I update my Bank Account for Deposits

A - If you need to update your bank account for deposits please reach out to the payments team using payments@keap.com.