

# WePay Setup

This article applies to:

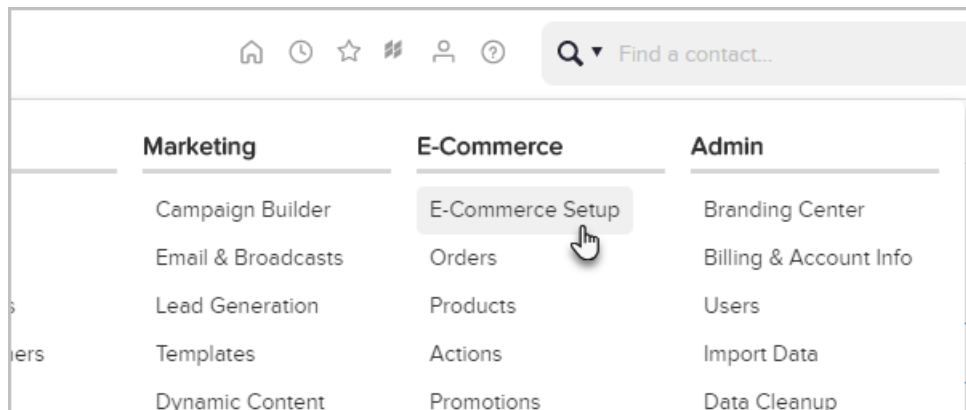
WePay closed its UK operations in August 2023. Customers will not be able to add a new WePay connection to their Keap account. There will be more information to come.

WePay is a US based online payment service provider that Keap partners with to offer an integrated payments solution. Customers use the WePay Merchant Portal to manage their merchant account. With WePay, it's easy to accept credit cards in minutes. Take the stress out of getting paid and get back to running your business. Please also refer to the [WePay Help Center](#).

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## Create a WePay login

- Navigate to E-Commerce > E-Commerce Setup.





- Under the Payment heading, click **Payment processing**.
- Select the email address of the financial administrator of your Infusionsoft by Keap account. Only Administrators in your Infusionsoft by Keap account have access to sign up with WePay.
- Choose your country and click **Get Started**.


## Get started

Choose the account user you want to manage Keap Payments:

Hannah Parks (HannahSParks@) ▼

Keap Payments is available in the following countries. Select the country your bank is located in:

 United States   Canada

 United Kingdom

*\* The default currency will be set to USD*

[Get Started](#)

5. You will receive an email titled, Please set up your WePay account. In the email, click **Set Up Your Account**.

Once you confirm your email, make sure you also log in and provide accurate identification information about yourself and your bank account. If you do not provide this information, Keap Payments will refund all payments to your payers 30 days after you accept your first payment.

[Set Up Your Account](#)

6. Fill out the form to create your login. For increased security, your WePay account password is separate from your Infusionsoft by Keap account password.

Please enter a password below to secure your Keap Payments account. For increased security, we recommend using a different password from your Keap ID.

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**Don Smith**  
DonTSmith@alwayshelpful.org

Set password

.....

I agree to [Terms of Service](#) and [Privacy Policy](#).

**Continue**

## Set up your account

1. Select your Entity Type.
2. Specify the legal structure of your trust.
3. Select your Industry category & Industry type (see table below).
4. Tell us about yourself.
5. Click **Submit** to acknowledge the Terms of Service and Privacy Policy.

Industry Category examples	Industry Type examples
<ul style="list-style-type: none"> <li>• Amusement and Entertainment</li> <li>• Associations</li> <li>• Bars and Restaurants</li> <li>• Business Services</li> <li>• Charity and Social Service</li> <li>• Clothing and Accessories</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising Services</li> <li>• Business Services - Not Elsewhere Classified</li> <li>• Cleaning, Maintenance &amp; Janitorial Services</li> <li>• Commercial Photography, Art, and Graphics</li> </ul>

### Add settlement details

1. Choose to either link your bank account for balance transfer or paper checks.
2. Enter your information and click **Save**.
3. Click **Finish**.

Not all card types are accepted by all merchants. Make sure that your merchant accepts the same cards that

you accept and in the same manner; e.g., Master vs. MasterCard. WePay processes with Master so if you use multiple merchants, make sure they accept Master.

## Login to the WePay Merchant Center

If you use WePay to process payments in Infusionsoft by Keap, you have access to the WePay Merchant Center. The WePay Merchant Center lets you generate reports, view activity, process refunds, and address any charge-backs. You will create your log-in credentials during your initial setup of WePay.

To access your WePay Merchant Portal, use the direct [link](#) or access via your Infusionsoft by Keap application.

1. Navigate to E-commerce > E-commerce setup > Payment Types.
2. Click **Manage Account** under WePay.
3. Login using with the credentials that you created when signing up for your WePay Account. If you are unable to remember your login information, click **Forgot your password**.

**Note:** Your email and password for the WePay Merchant Center should be different than the your Infusionsoft by Keap login.

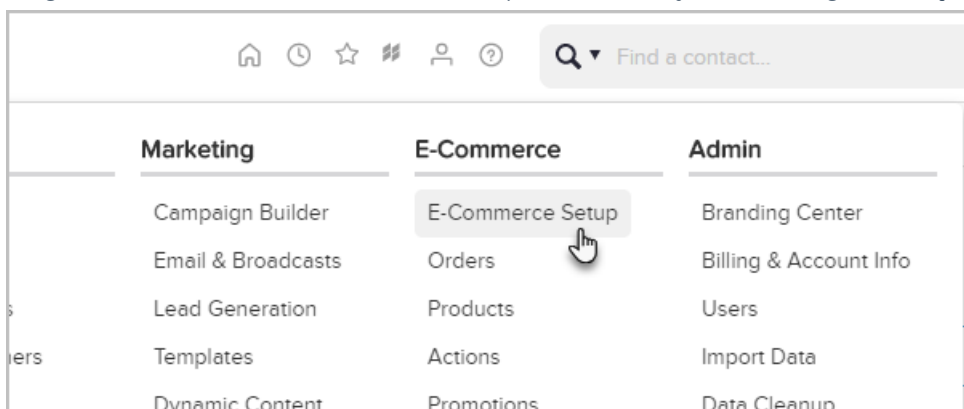
## Migrate from a merchant account to WePay

If you need to migrate from an existing merchant account, check out the [WePay Migration Guide](#) article.

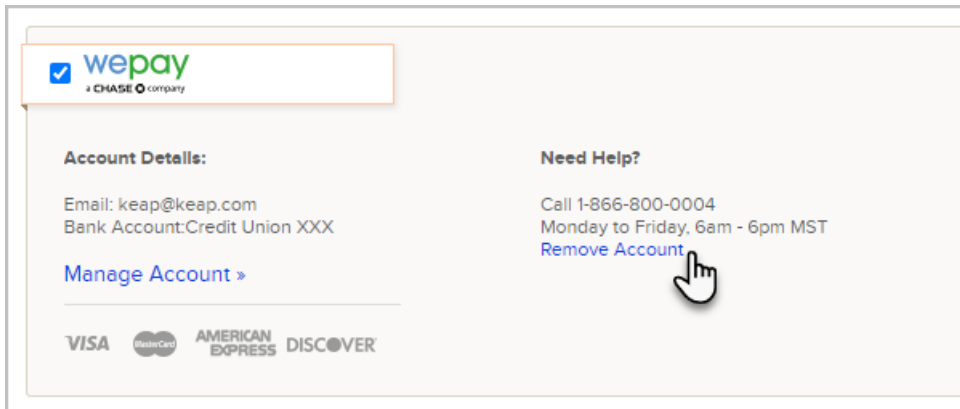
## Remove a WePay account

Only users with the Admin role are able to remove a WePay account.

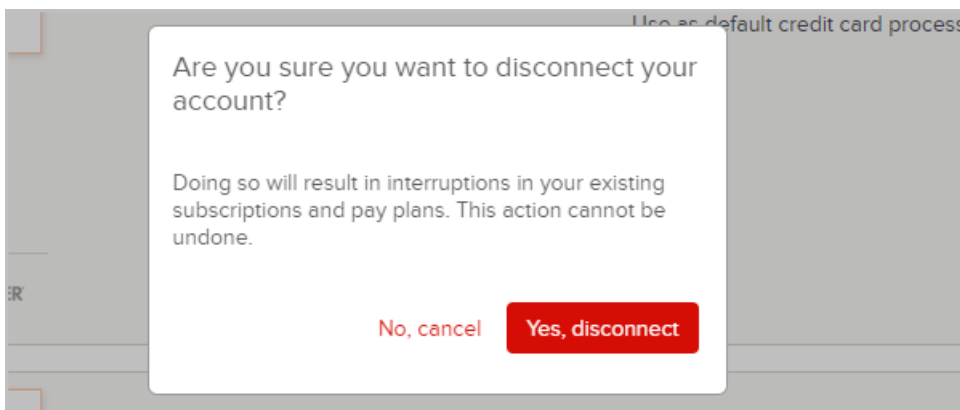
1. Navigate to E-Commerce > E-Commerce Setup. Under the Payment heading, click **Payment processing**.



2. Select **Remove Account**.



3. Confirm that you would like to remove the account.



4. You will receive confirmation that your account was removed.

## WePay Setup FAQs

### Why is action needed to complete my account?

Know your customer (KYC) is the process of verifying the identity of a customers / merchants and their business. Check out this [article](#) for more information.

### How soon after sign up can I begin taking payments?

You can begin taking payments through WePay immediately after completing the WePay setup.

Note that new accounts will not be able to process until our Trust and Safety team review and verify the account. Their team will review your account within 1-2 business days and should any additional information be needed to verify, they will reach out to you directly via email.

### I have a question about WePay, should I contact WePay or Keap?

[WePay](#) can provide you with direct assistance.

### Who is eligible to sign up for WePay?

Any admin user in your Infusionsoft by Keap account can sign up for WePay. The person who signs up must be a

financial representative of your company and must be an account holder on the bank account you plan to receive your funds into.

#### **Can I set up more than one WePay account?**

Only one WePay account can be set up per account.

#### **How do I set WePay to be my default merchant account?**

If this is the first merchant account you've set up in your Infusionsoft by Keap app, then WePay will automatically be set as the default merchant account to process credit cards. If you already have a different merchant account setup, you will see a new radio button option on the payment types page allowing you to select whether you want WePay or your other merchant account to be the default merchant account for your app.

#### **Is WePay available in my country?**

WePay is currently only accepting new customers with bank accounts in the United States, the United Kingdom and Canada.

#### **I'm using WePay for my business, why do I have to provide my personal information?**

We are required by law to collect and verify certain information about our customers. Your personal information such as your Social Security number and date of birth is used to confirm that you're authorized to act on behalf of the business. This prevents unauthorized people from creating an account on behalf of your business.

#### **Is my information safe?**

Protecting your information and your privacy is above and beyond our top priority. All sensitive information is encrypted and stored in a PCI Compliant environment.

#### **Does using WePay affect my taxes?**

Please refer to the article [How does WePay affect my taxes?](#)

#### **What's an EIN?**

An Employer Identification Number (EIN) is a Federal Tax Identification Number used to identify a business. Your EIN can be found on the paperwork you filed with the IRS to legally form your business. If you did not file with the IRS, you likely don't have an EIN.

#### **Where can I find my business type?**

This can be found on the paperwork you filed with the IRS to legally form your business. If you did not file with the IRS, you are likely a sole proprietor or independent contractor.

#### **Does WePay have a required risk reserve minimum balance?**

Reserves are sometimes held to protect your business against chargebacks or disputes. We do not have a set reserve amount for our customers, instead any possible reserves will be set automatically based on the transaction history in your account as well as the information you provide in your profile, your industry, and how you're using WePay.

#### **What credit cards can I accept with WePay?**

When using WePay you can accept Visa, Mastercard, American Express and Discover cards. Debit cards backed by Visa or Mastercard are accepted as well.

What do I need to know about sales tax?

Check out this [sales tax article](#).

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