

Filtering settlement data

If you want to view settlements within a certain date range or time period, you can do so using the filter options in Verofy® Cloud.

To begin, head to the **Settlements** tab.



As default, the date range filter will be preset to the current month (the example below shows what the preset date range filter would show as on 14th May 2024).

Dashboard > Settlements

Last login: 14 May 2024 09:57:50
You will be logged out in: 29:33 minutes

Settlement summary: 14th April 2024 - 14th May 2024

Awaiting data
Expected 9:30 am tomorrow

£1,231.18
Previous settlement

£594.46
Average settlement

£433,361.60
Total settled

Settlements for the period of 14th April 2024 - 14th May 2024

Advanced searchExport

Transactions date	Settled amount	Settlement reference	Payment date
14 May 2024 - 09:30	£1,231.18	VER.	14 May 2024 10:32 Settled
12 May 2024 - 09:30	£1,069.60	VER.	13 May 2024 10:39 Settled
11 May 2024 - 09:30	£916.99	VER.	13 May 2024 10:33 Settled
10 May 2024 - 09:30	£435.02	VER.	10 May 2024 10:38 Settled

The summary data at the top of the screen is not dynamically updated based on filtered date range, it shows an overview of yesterdays settlement (*previous settlement*), average settlement amount, and the total settled to you for this location since you onboarded with us.

We're working on adding an extra summary value that will display the settlements total for the date range selected. This will be available soon.

You can click the calendar icon from this page to filter to a different date range.

Settlement summary: 14th April 2024 - 14th May 2024

Expected 9:30 am tomorrow

Previous settlement

Average settlement

Total settled

Settlements for the period of 14th April 2024 - 14th May 2024 [Advanced search](#)

Export

Transactions date	<div><div><April2024</div><div>May2024></div></div>	
14 May 2024 - 09:30	<div><div>MonTueWedThuFriSatSun</div><div>1234567</div><div>891011121314</div><div>15161718192021</div><div>22232425262728</div></div>	<div>Settled</div> <div>...</div>
12 May 2024 - 09:30	<div><div>MonTueWedThuFriSatSun</div><div>293012345</div><div>6789101112</div><div>13141516171819</div><div>20212223242526</div></div>	<div>Settled</div> <div>...</div>
11 May 2024 - 09:30		<div>Settled</div> <div>...</div>
10 May 2024 - 09:30		<div>Settled</div> <div>...</div>
9 May 2024 - 09:30		<div>Settled</div> <div>...</div>

If you have lots of records, you can choose how many settlements to view per page (up to 100) and can select the page you need from the drop down. This bar is located at the bottom of the list of settlements.

Page 1 of 4 (86 total items)

Showing 25 items per page

Page 1 Next > End >>

If you need to export your filtered settlements, click [here](#) to see how you can do this.

Revision #3

Created 13 May 2024 13:56:35 by Verofy® Support

Updated 14 May 2024 10:48:31 by Verofy® Support