



# XPAY BACK-OFFICE USER MANUAL

for Merchant

## Review

<i>Version</i>	<i>Update description</i>	<i>Data</i>
<i>Version 1.0</i>	<i>First version of the document</i>	<i>25/07/2023</i>

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## 1. Introduction

XPay system provides merchants with a secure, multi-channel platform for e-commerce, Pay by link Plus and M.O.TO. (Mail order - Telephone order) sales, enabling them to accept and manage payments easily and securely.

The Back Office Portal is a comprehensive and functional tool for configuring the services offered by the XPay Payment Gateway. The URL to access the production environment is:

- <https://xpaydashboard.nexigroup.com/login>

An e-mail will be sent by Nexi (XPay) to the merchant including the reference to the merchant Back Office portal (URL) and directions on how to access the portal itself and change password at first log-in.

This email could also include reference to the XPay developer portal: <https://developer.nexigroup.com/en-EU/>.

This document provides instructions on how to use the Back Office for the various users. It contains a functional description of the Interface and is divided into the following sections:

- language
- instructions on how to access the Back Office
- Back Office structure
- detailed descriptions of each functionality

## 2. Language

The Back Office is available in English.

## 3. Access

For the first access to the Back Office, Nexi will send a welcome e-mail with access instructions and a link to reset the password.

The link is valid for 24 hours, after which it will be necessary to reset the password from the portal login page.

The e-mail indicated during contract subscription will be registered as an Admin profile. Then, the Admin has the possibility to create both other users and other Admins.

### 3.1 Profiles

Users with access to the Back Office will be identified through their credentials and linked to a specific profile with a set of functionalities:

- **Admin:** this profile can:
  - view orders/transactions
  - do captures/refunds on operations
  - do M.O.T.O. transactions (if enabled, as a merchant should have signed only for MOTO service)
  - create Pay by Link Plus (if enabled, as a merchant should have signed only for Pay by Link Plus service)
  - create/manage users
  - generate API keys

- configure terminal
- **Operator:** can do what the Admin profile does, except:
  - create/manage users
  - generate API keys
  - configure terminal
- **Reporter:** can do what the Operator profile does except:
  - do captures/refunds on operations
  - do M.O.T.O. transactions
  - create Pay by Link Plus

In a nutshell:

Main functionalities	Admin	Operator	Reporter
View orders/transactions	X	X	X
Do capture/ refund/ void on operations	X	X	-
Do M.O.T.O. transactions	X	X	-
Create Pay by Link Plus	X	X	-
Create/manage users	X	-	-
Generate API keys	X	-	-
Configure terminal	X	-	-

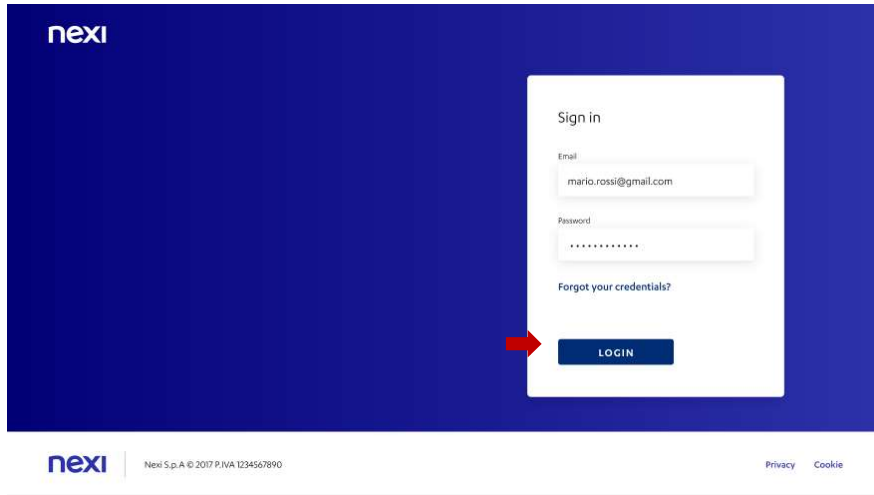
Features not available to the various profiles will not be displayed or clickable.

### 3.2 Login

A pre-login page is shown and by clicking on 'Login' in the upper right corner, it takes you to the login interface.



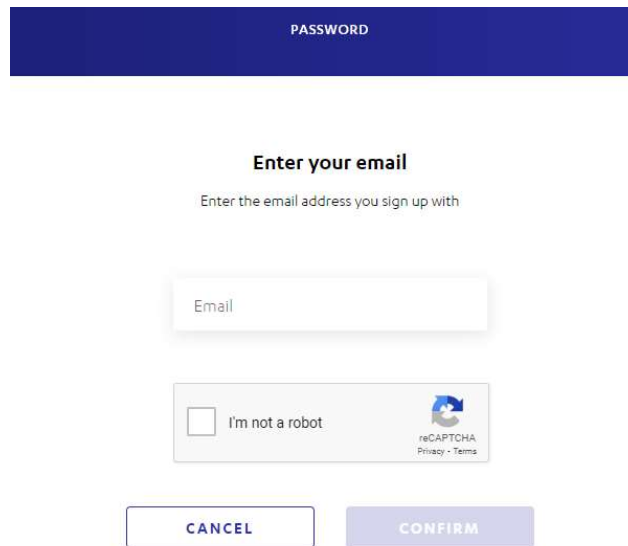
To access the portal, simply enter Username (e-mail address that has been declared during the onboarding for the first access or the one defined in the Backoffice) and password as in the image below:



### 3.3 Retrieve credentials

To retrieve the password, you need to perform the following steps:

1. Click the 'Forgot your credentials?' link on the Login Page
2. Enter the email address you sign up with
3. Click on 'I'm not a robot' and confirm



An email will be sent to reset the password. Once changed, you can login to the portal using the new password from next time.

The password must have the following characteristics:

- Max password length: 20
- Min password length: 8
- Password history of last 5
- Password age: 90 days

The password must contain at least one occurrence for three out of four of the following categories:

- ABCDEFGHIJKLMNOPQRSTUVWXYZ
- abcdefghijklmnopqrstuvwxyz
- 0123456789
- ~!@#\$%^&\*()-\_+=+[]{}|;:.,<>/?'""

It is possible to make five login tries by entering the wrong password. After 5 incorrect login requests, the service is suspended for 3 hours (authentication is not allowed). If the password has expired, you will be redirected to the change password page when logging in.

### 3.4 Logout

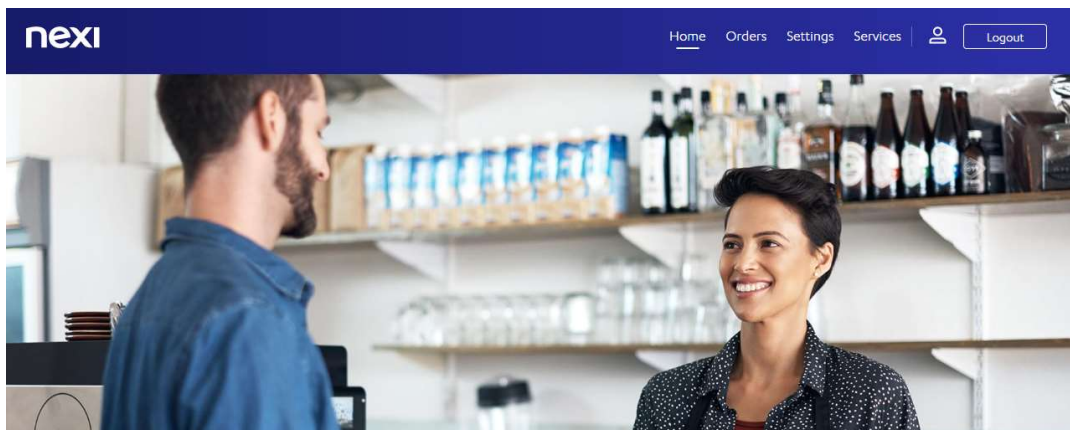
The Logout Function allows you to log out of the Back Office. From the main page, the choice in the top right-hand corner must be selected as detailed below:



For shared PC/workstations it is recommended to logout to leave the Back Office. The session ends automatically after 5 minutes.

## 4. Back Office structure

The Back Office allows authorized users to perform various functionalities, which are displayed in a horizontal menu, as in the image below. Depending on the User's profile, a different list of Functions will appear.



Once the choice has been made, a specific drop-down menu appears for some functionalities. The toolbar will show the following sections:

- Home
- Orders
- Settings
- Services
  - Pay by Link Plus
  - M.O.T.O.
- Profile (Change password)

## 5. Functionalities

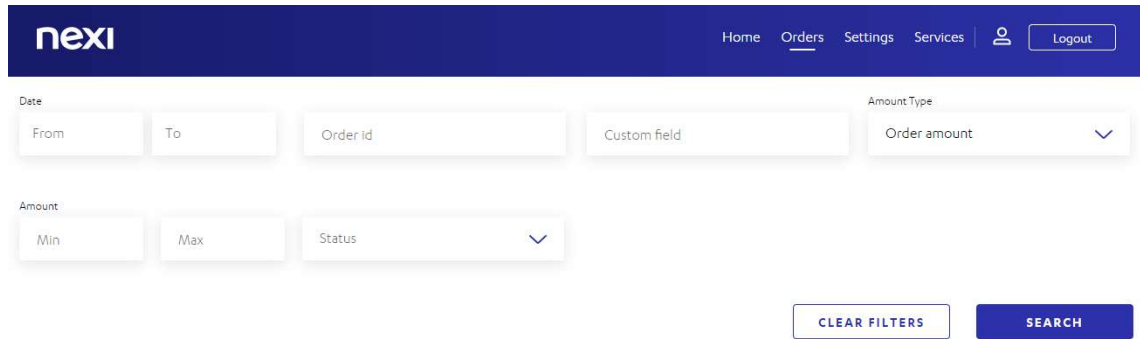
The following chapter provides a description of the features made available by the portal. Some sections are only visible and clickable from specific profiles (refer to paragraph 3).

Menu	Sub-menu	Description
Orders	-	It allows the search of all orders, either via filters or in list form, and to view the details for each order.
Settings	-	It contains 3 sections: <ul style="list-style-type: none"> <li>• Terminals Configuration, to customize the terminal configurations.</li> <li>• Users: settings and information associated with a user. From this section, the Admin can also create new users.</li> <li>• API Keys: shows the list of API keys and allows the admin to create new ones.</li> </ul>
Services	Pay by Link Plus	It allows the Merchants to provide a link to their customers (e.g. in an email invoice). Through the link the customers are redirected to a webpage where they can securely make the payment with their preferred payment method.
Services	M.O.T.O.	It is intended for merchants who need to handle telephone or mail transactions via Back Office.
Profile	Change Password	It shows the user’s email address and the user type (e. g. Admin). It also allows the user to change the password.

### 5.1 Orders

#### 5.1.1 Orders List

This is the highest-level view of the orders list. A research function is available to check the status of generated payment requests in real time. It is possible to filter the search results based on the fields displayed.



The page presents a series of fields that the user can fill in:

Field	Type	Description
Date – from	dd/mm/yyyy	Retrieve orders created from this time. The field must be valorized from the calendar that appears by selecting the field. The search can be carried out in a range of 1 month, going back up to 13 months.
Date – to	dd/mm/yyyy	Retrieve orders up to this time. The field must be valorized from the calendar that appears by selecting the field.
Order ID	Max 27crt alpha numeric	Merchant order id, unique in the merchant domain.
Custom Field	Max 255crt alpha numeric	Additional order description.
Amount Type	Combo box	It can be: <ul style="list-style-type: none"> <li>- Order amount</li> <li>- Authorized amount</li> <li>- Captured amount</li> </ul>
Amount minimum	Numeric	Minimum value in the range within which to search for the order. This field is related to the amount type specified.
Amount maximum	Numeric	Maximum value in the range within which to search for the order. This field is related to the amount type specified.
Status	Combo box	It can be: <ul style="list-style-type: none"> <li>- To capture</li> <li>- Captured</li> </ul>

It is also possible to reset filters by clicking on the "clear filters" button, as in the image below.



nexi Home Orders Settings Services Logout

Date From To Order id Custom field Amount Type Order amount

Amount Min Max Status

CLEAR FILTERS SEARCH

Once the Search button is clicked, the system will display all orders that match the selected criteria.

nexi Home Orders Settings Services Logout

Date From To Order id Custom field Amount Type Order amount

Amount Min Max Status

CLEAR FILTERS SEARCH

The following are the details available for each order:

- Date in which the order has been created
- Order ID
- Order Amount
- Authorized Amount
- Captured Amount, shows up-to-date information on the actions that have been performed on the order
- Description, descriptive field inserted by the merchant (different from the following “custom field”)
- Custom Fields

Date: 01/01/2023, 01/31/2023, Order id, Custom field, Amount Type: Order amount

Amount: 1, 10, Status

CLEAR FILTERS SEARCH

DATE	ORDER ID	ORDER AMOUNT	AUTHORIZED AMOUNT	CAPTURED AMOUNT	DESCRIPTION	CUSTOM FIELDS
01/31/2023, 13:02:05	1675166503464	€0.10	€0.00	€0.00	TV LC 3423	WEEKEND PROMOTION
01/31/2023, 12:58:23	BTID12354698523651478452134	€0.02	€0.02	€0.00	TV LC 3423	WEEKEND PROMOTION
01/31/2023, 12:37:55	1675165062809	€0.10	€0.00	€0.00	TV LC 3423	WEEKEND PROMOTION

By default, all orders are shown in chronological order, from most recent to oldest. For each of these fields it is possible to sort them in ascending or descending order.

DATE	ORDER ID
01/31/2023, 12:23:20	1675164200857
01/31/2023, 12:37:55	1675165062809
01/31/2023, 13:02:05	1675166503464

The list may consist of up to 20 highlights per page; if there are more, the user can load more through the button at the end of the page.

01/31/2023, 12:58:23	BTID12354698523651478452134	€0.02	€0.02	€0.00	TV LC 3423	WEEKEND PROMOTION
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LOAD MORE

If no order matches the Search criteria entered in the Search fields, a chart without any results will be displayed.

Date: From To Order.id Custom field example Amount.Type Order amount

Amount: Min Max Status

CLEAR FILTERS SEARCH

DATE	ORDER ID	ORDER AMOUNT	AUTHORIZED AMOUNT	CAPTURED AMOUNT	DESCRIPTION	CUSTOM FIELDS
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### 5.1.2 Order Summary

From the list of orders, by selecting the lens, it is possible to view the following details per order:

- Order summary
- Custom Fields
- Customer Info
- Shipping Address
- Billing Address

← ORDERS ORDER DETAIL

Order - 1675166503464

ORDER SUMMARY CUSTOM FIELDS CUSTOMER INFO SHIPPING ADDRESS BILLING ADDRESS

Date	Order amount	Authorized amount	Captured amount	Description
01/31/2023, 13:02:05	€0.10	€0.00	€0.00	TV LG 3423

OPERATIONS

CHANNEL	DATE	TYPE	AMOUNT	PAYMENT INSTRUMENT	STATUS	ACTION	DETAILS
ECOMMERCE	01/31/2023, 13:02:05	AUTHORIZATION	€0.10	VISA 434994*****0906	DECLINED	:	🔍

In the section Order Summary – Operations, there are details available for each order.

Field	Description
Channel	It can be: <ul style="list-style-type: none"> <li>• ECOMMERCE - cardholder initiated operation through an online channel</li> <li>• BACKOFFICE - merchant initiated operation. It includes post operations and MIT</li> </ul>
Date	Operation Time

Type	<p>It indicates the purpose of the request:</p> <ul style="list-style-type: none"> <li>• Authorization<sup>1</sup> - any authorization with explicit capture</li> <li>• Capture - a captured authorization or an implicit captured payment</li> <li>• Void - reversal of an authorization</li> <li>• Refund - refund of a captured amount</li> <li>• Cancel - the rollback of a capture</li> </ul>
Amount	Operation amount in the payment currency
Payment Instrument	PAN
Status	<p>Transaction output:</p> <ul style="list-style-type: none"> <li>• AUTHORIZED - Payment authorized</li> <li>• EXECUTED - Payment confirmed, verification successfully executed</li> <li>• DECLINED - Declined by the Issuer during the authorization phase</li> <li>• DENIED_BY_RISK - Negative outcome of the transaction risk analysis</li> <li>• THREEEDS_VALIDATED - 3DS authentication OK or 3DS skipped (non-secure payment)</li> <li>• THREEEDS_FAILED - cancellation or authentication failure during 3DS</li> <li>• PENDING - Payment ongoing. Follow up notifications are expected</li> <li>• CANCELED - Canceled by the cardholder</li> <li>• VOIDED - Online reversal of the full authorized amount</li> <li>• REFUNDED - Full or partial amount refunded</li> <li>• FAILED - Payment failed due to technical reasons</li> </ul>
Action	<p>It can be:</p> <ul style="list-style-type: none"> <li>• Capture</li> <li>• Refund</li> <li>• Void</li> </ul>
Details	Clicking on the lens it's possible to view the details of the operation

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<sup>1</sup> Preauthorization is available only via API (generation and visualization). On the Backoffice the type 'Preauthorization' is included in the authorization one.

Through the field 'Action' it is possible to perform action on orders, depending on the Status (see the table below).

Operation Type	Operation Result-Status	Actions allowed
Authorization	Authorized	<ul style="list-style-type: none"> <li>• Capture</li> <li>• Void</li> </ul>
Authorization	Executed	Refund
Authorization	Declined	No actions allowed
Authorization	Pending	No actions allowed
Authorization	Denied_by_risk	No actions allowed
Authorization	Threeds_validated	No actions allowed
Authorization	Threeds_failed	No actions allowed
Authorization	Failed	No actions allowed
Capture	Executed	Refund <sup>2</sup>
Capture	Failed	No actions allowed
Refund	Refunded	No actions allowed
Refund	Voided	No actions allowed
Refund	Failed	No actions allowed
Cancel	Canceled	No actions allowed

The operation type 'pre-authorization' will be shown as an 'authorization' but it's correctly managed as pre-authorization.

If the status operation is 'authorized', clicking on 'Action' a set of possible actions will be shown.

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<sup>2</sup> A partial refunded operation, in status Executed, can be refunded again till captured amount.

OPERATIONS

CHANNEL	DATE	TYPE	AMOUNT	PAYMENT INSTRUMENT	STATUS	ACTION	DETAILS
ECOMMERCE	04/12/2023, 16:25:00	AUTHORIZATION	€5.00	VISA 401200****1112	AUTHORIZED	CAPTURE VOID	🔍

If the status operation is 'declined', no action can be performed.

OPERATIONS

CHANNEL	DATE	TYPE	AMOUNT	PAYMENT INSTRUMENT	STATUS	ACTION	DETAILS
ECOMMERCE	04/18/2023, 10:48:37	AUTHORIZATION	€500.00	374245****1007	DECLINED	Action not found	🔍

Clicking on the lens 'Details' it's possible to view the details of the operation:

1. **Summary**, the following data are displayed:
  - a. Terminal ID
  - b. Order
  - c. OID - Omnichannel ID
  - d. Channel
  - e. Operation Type
  - f. Status
  - g. Date
  - h. Payment Method
  - i. Payment Instrument
  - j. End to End ID - It is defined by the schemes to uniquely identify the transaction. Required for schemes reconciliation purposes.
  - k. Operation Amount
2. **Security Warnings**, notify to the merchant that create the orders that some field could not be compliant with schemes security.
3. **Additional info**, contains further information about operations (such as: Masked Pan / Authorization Code / Card Country / 3DS / Rrn / Message Reason Code / Schema TID / Status).

5.1.2.1 CAPTURE

It allows you to request the payment schemes to account for the defined amount, i.e. to arrange for the crediting of the purchase order amount to the merchant (with the simultaneous debiting, to the consumer, of the current account linked to the card used).

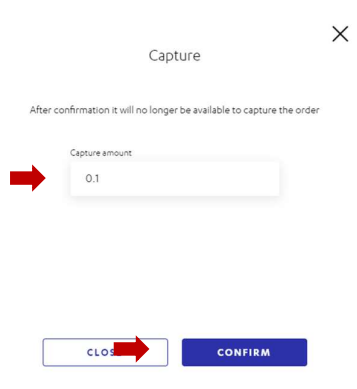
This action can be performed on “Authorized orders”.

According to scheme rules:

- “PAY” (final amount) transaction must be captured until 7 days from authorization, after that it will be voided
- “PREAUTH” (estimated amount, for explicit captures) transaction must be captured until 30 days from authorization

Once the order is selected, click on “Capture”, the amount to be accounted for is entered – in the field “operation amount”. Please consider:

- Min Amount:1
- Max Amount: authorized Amount – captured Amount
- Default Amount: max Amount/ authorized Amount – captured Amount



In this way it is possible to capture the payment totally, indicating the full amount, or partially, indicating the amount to be accounted for. After confirmation it will no longer be available to capture the order; if the amount captured is partial to the initial amount, a second capture with the rest of the authorized amount is not possible.

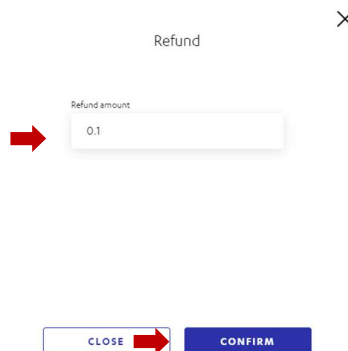
#### 5.1.2.2 REFUND OF CAPTURED AMOUNT

It is possible to make a full or partial refund of an order meaning full or partial re-credit to the consumer of the refunded amount. An executed operation can be refunded; on a refunded amount no further operation by the merchant is possible.

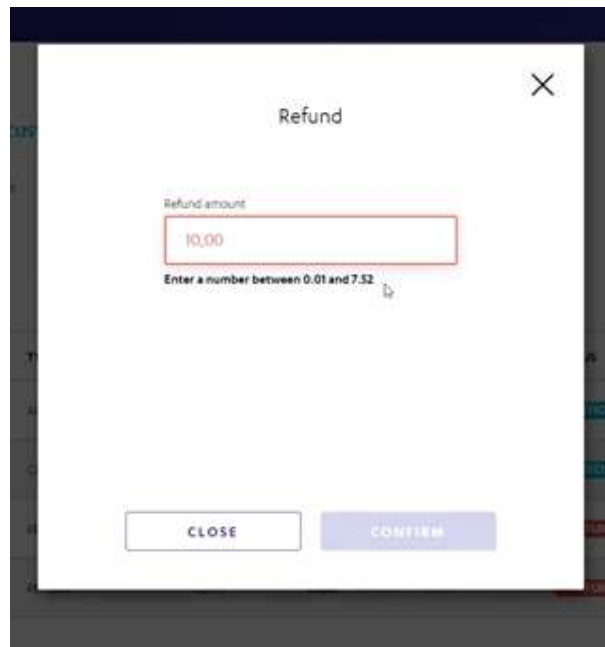
It is possible to make several partial refunds up to the total captured amount of the payment and until 13 months.

Once the order is selected, click on "Refund" and fill in the "transaction amount" field with the amount to be accounted for. Please consider:

- Min Amount: 1
- Max Amount: captured Amount
- Default Amount: max Amount/ captured Amount



It is not possible to enter an amount greater than the residual captured amount. An error message with the correct range will be displayed in this case.



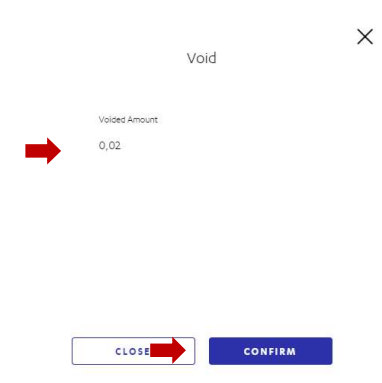
### 5.1.2.3 VOID OF AUTHORIZED AMOUNT

It is possible to make a request to reverse the entire amount of an authorization, in the same day (before clearing), that will free up the card holder plafond on his card.

When visualizing the order details, by clicking the action "Void" a popup let you confirm your choice.

Please consider:

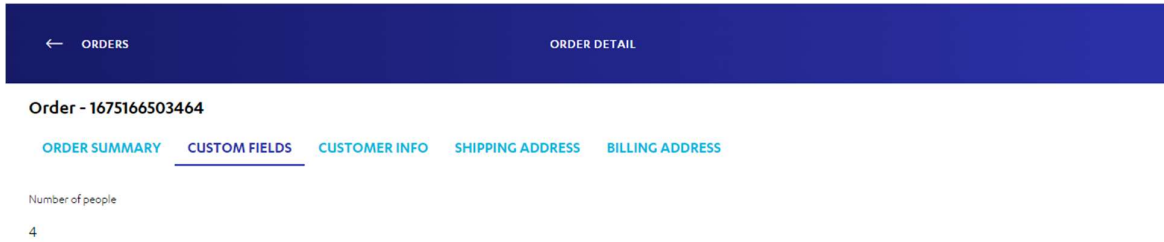
- Min Amount: authorized Amount
- Max Amount: authorized Amount
- Default Amount: max Amount/ authorized Amount





### 5.1.3 Custom Fields

This section shows the custom fields set by the merchant during the order creation.

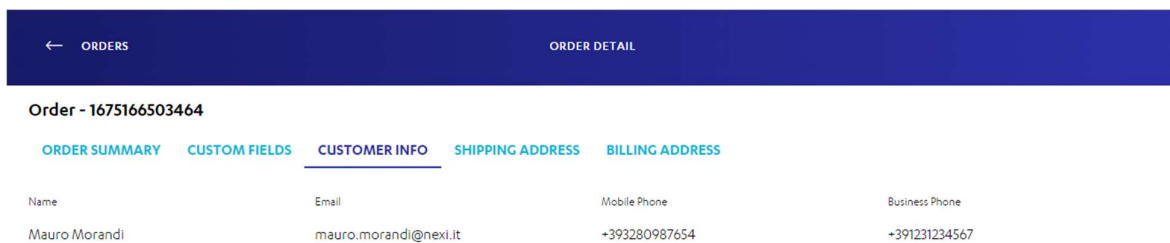


The screenshot shows a dark blue header with a left arrow and 'ORDERS' on the left, and 'ORDER DETAIL' on the right. Below the header, the order ID 'Order - 1675166503464' is displayed. A navigation bar contains five tabs: 'ORDER SUMMARY', 'CUSTOM FIELDS' (which is underlined), 'CUSTOMER INFO', 'SHIPPING ADDRESS', and 'BILLING ADDRESS'. Below the tabs, the text 'Number of people' is followed by the value '4'.

### 5.1.4 Customer info

This section contains information related to the customer of that order:

- Name
- Email
- Mobile phone
- Business phone



The screenshot shows a dark blue header with a left arrow and 'ORDERS' on the left, and 'ORDER DETAIL' on the right. Below the header, the order ID 'Order - 1675166503464' is displayed. A navigation bar contains five tabs: 'ORDER SUMMARY', 'CUSTOM FIELDS', 'CUSTOMER INFO' (which is underlined), 'SHIPPING ADDRESS', and 'BILLING ADDRESS'. Below the tabs, a table displays customer information:

Name	Email	Mobile Phone	Business Phone
Mauro Morandi	mauro.morandi@nexi.it	+393280987654	+391231234567

### 5.1.5 Shipping Address

This section contains the information related to shipping address of that order.

- Name
- Street
- Additional info
- City
- Postal code
- Province
- Country

← ORDERS
ORDER DETAIL

**Order - 1675166503464**

[ORDER SUMMARY](#)
[CUSTOM FIELDS](#)
[CUSTOMER INFO](#)
[SHIPPING ADDRESS](#)
[BILLING ADDRESS](#)

Name	Street	Additional info	City
Mario Rossi	Piazza Maggiore, 1	Quinto Piano, Scala B	Bologna

Postal code	Province	Country
40124	BO	ITA

### 5.1.6 Billing Address

This section contains the information related to billing address of that order.

- Name
- Street
- Additional info
- City
- Postal code
- Province
- Country

← ORDERS
ORDER DETAIL

**Order - 1675166503464**

[ORDER SUMMARY](#)
[CUSTOM FIELDS](#)
[CUSTOMER INFO](#)
[SHIPPING ADDRESS](#)
[BILLING ADDRESS](#)

Name	Street	Additional info	City
Mario Rossi	Piazza Maggiore, 1	Quinto Piano, Scala B	Bologna

Postal code	Province	Country
40124	BO	ITA

## 5.2 Settings

### 5.2.1 Terminals configuration

The user can see the list of terminals associated to the merchant created in onboarding phase.

TERMINALS CONFIGURATION   [USERS](#)   [API KEYS](#)

TERMINAL ID	PAYMENT NOTIFICATIONS	EMAIL	CUSTOMER PAYMENT NOTIFICATIONS	CONFIRMATION TYPE	
95001867	DISABLED	STEFANO.ANTINORI@NEXIGROUP.COM	DISABLED	MANUAL	<a href="#">EDIT</a>
95001868	ENABLED	STEFANO.ANTINORI@NEXIGROUP.COM	ENABLED	MANUAL	<a href="#">EDIT</a>
95001869	ENABLED	TEST@TEST.COM	DISABLED	MANUAL	<a href="#">EDIT</a>

The following are the details available for each terminal:

Field	Description
Terminal ID	Unique Terminal identifier that made the authorization request
Payment notifications	It can be: <ul style="list-style-type: none"> <li>- DISABLED</li> <li>- ENABLED</li> </ul> The payment notification can be set at terminal level and sent to a Merchant user email, indicated if enabled, in the next field.
Email	Merchant email on which receive notifications. Only one email can be set.
Customer payment notifications	It can be: <ul style="list-style-type: none"> <li>- DISABLED</li> <li>- ENABLED</li> </ul> Select whether you want to have the customer receive an email notification in case of payment confirmation.
Confirmation type	Configure the terminal's default accounting mode: <ul style="list-style-type: none"> <li>- Automatic: implicit confirmation of operations</li> <li>- Manual: explicit confirmation of operations</li> <li>- Deferred: automatic confirmation of transactions after the indicated number of days, maximum 4</li> </ul>

When an Admin User accesses the terminal configuration page, he sees the updated situation of that terminal regardless of who edited it. The Admin User is created at merchant level and has visibility over all terminals belonging to that merchant. These settings can be changed by clicking on 'EDIT'.

The following page will be displayed:

**TERMINAL ID 95001867 - E- COMMERCE**

**PAYMENT NOTIFICATIONS**

Would you like to receive payment notifications to your email address?  No  Yes ⓘ Email

Would you like to send payment notifications to your customers?  No  Yes ⓘ

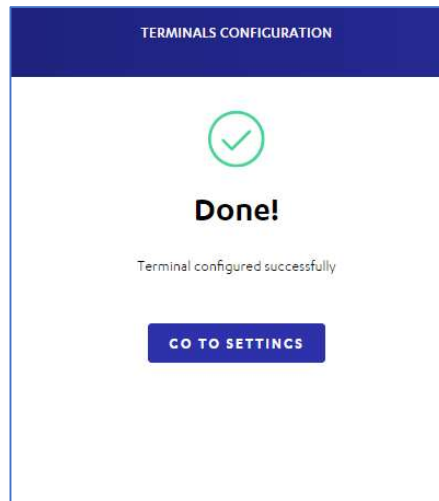
**PAYMENT EXECUTION**

Confirmation Type  
Automatic  ⓘ

CANCEL

SAVE

Once the configurations have been modified, click on 'SAVE' to save the changes. A confirmation page is displayed.



**5.2.2 Users**

The Admin profile can see the list of users configured to access the Back Office. Each user is displayed with:

- User ID - unique identifier of the user
- Name
- Role – Admin, Operator or Reported
- State – Activated or Deactivated

CREATE

USERNAME	NAME	ROLE	STATE
VAWITAC252@V255R.COM	FRANCESCO	ADMIN	ACTIVATED
-	SAM SMITH PROVA	OPERATOR	DEACTIVATED
-	SAM SMITH PROVA	OPERATOR	ACTIVATED
-	AMANDA	ADMIN	ACTIVATED

On an activated user, the Admin can block or Edit the selected one.

CREATE

USERNAME	NAME	ROLE	STATE
VAWITAC252@V255R.COM	FRANCESCO	ADMIN	ACTIVATED
-	SAM SMITH PROVA	OPERATOR	DEACTIVATED
-	SAM SMITH PROVA	OPERATOR	ACTIVATED

Deactive  
Edit

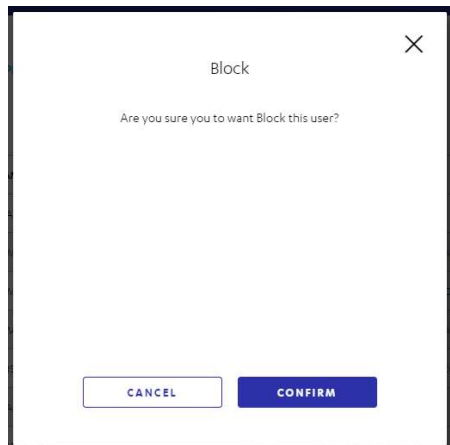
On a deactivated user, the Admin can unblock or edit it.

CREATE

USERNAME	NAME	ROLE	STATE
VAWITAC252@V255R.COM	FRANCESCO	ADMIN	ACTIVATED
-	SAM SMITH PROVA	OPERATOR	DEACTIVATED
-	SAM SMITH PROVA	OPERATOR	ACTIVATED

Activate  
Edit

If the Admin clicks on block /unblock, the following confirmation page is displayed.



If the Admin clicks on edit, it can change the name and the role of the selected user and Save.

EDIT USER

User - 86622c2d-0317-4ce5-bce5-  
650da2bb3f00

Name	Role	Email
<input type="text" value="verodigiorgio@gmail.com"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="Admin"/>	<input type="text" value="verodigiorgio@gmail.com"/>

CANCEL

SAVE

The Admin can also create a new User by clicking on the appropriate button and entering the following data: Name, Role – Admin, Operator or Reported, and username (e-mail). It is not possible to create two users with the same e-mail.

CREATE USER

Name	Role	Username
<input type="text"/>	<input style="border-bottom: 1px solid #ccc;" type="text"/>	<input type="text"/>

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### 5.2.3 API Keys

The Admin profile can see the list of API keys and create a new API key.

An API key is the authentication mechanism that allow the merchant to integrate XPay APIs for the different integration options.

The page shows the list that may consist of up to 30 highlights per page. From the list of the API Keys, it is possible to view the following details:

- ID
- Terminal ID
- Expiring Date - suggested date by XPay on which execute the renew of the API Keys on system

On a single record it is possible to:

- See the API key, by clicking “Show” - It remains visible for a limited time
- Once shown, copy the API Key, by clicking “Copy”
- Delete the API Key, by clicking on the basket icon

TERMINALS CONFIGURATION    USERS    API KEYS

**CREATE**

ID	EXPIRING DATE	TERMINAL ID		
1	06/12/2023, 12:54:48	95001868	SHOW	
2	06/12/2023, 15:19:56	95001867	SHOW	
3	06/12/2023, 13:35:18	95001869	SHOW	

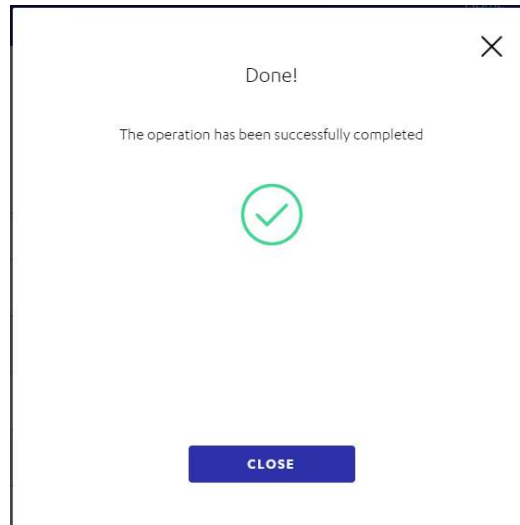
At the top right there is a 'CREATE' button for the creation of a new API Key. To create a new API Key, you have to choose a terminal ID and then click on 'Confirm'.

Create API Key

Terminal Id

95001868

Once confirmed, a confirmation page is displayed.



### 5.3 Services

In addition to complying with the profiling rules to operate the specific functionalities, terminals must be enabled below for the functionalities described. For example, the Pay By Link Plus section will only be visible if there is at least one terminal of that merchant enabled for this service.

#### 5.3.1 Pay by Link Plus

This solution allows to create payment links, which merchant can send via email or via the most famous messaging systems to customers.

The payment link can be generated both from the gateway Back Office, through the appropriate panel, and through a dedicated API, in case there is the need to integrate this service into a management system.

If there is only one Pay by Link-enabled terminal available, the page shows “Create a payment request” with two already filled fields, Terminal ID and Order ID.

If there is more than one Pay by Link-enabled terminal available, you will need to select the terminal for which you want to proceed via drop-down list.

The field Order ID is set by default by the system but can be modified by the merchant.

This way allows to make a single payment by filling in the request fields with:

Field	Description
Amount	Transaction amount. It cannot be modified by the customer receiving the link.
Expiring date	Latest date after which the link is no longer available. Defines the duration of the payment link within which the customer can make the payment. After this date, a new link must be created. (Max 90 days)
Name	Customer Name. Optional
E-mail	Customer E-mail. Optional



Description	Order description. This text will appear on the customer's checkout page. Optional
-------------	---

The merchant has the option to enter additional information, divided into 3 sections:

**Create payment request**

Terminal ID 95001867	Order id PBL-14032023044007-95001867	Amount (euro)	Expiring date 03/29/2023
Name (optional)	Email (optional)	Description (optional) <small>50 characters</small>	

**➔ -ADDITIONAL INFO**

**Other info** (optional), with the following fields:

- Customer ID - This code can help to identify the customer in other sections of the Back Office, uniquely
- Language - If you leave the field empty, the page automatically adapts to the language of the user's browser, otherwise the defined language will be used. Supported languages are: ITA, ENG, SPA, FRE, JPN, POR, DEU, ARA, RUS,ZHO.
- The language selected enables the customer to view the payment page in the specified language. In any case, the customer has the option of changing the language on the payment page and choosing the desired language.
- Custom field - This text will not be displayed on the customer's payment page but will be visible in the order details within the Back Office
- Country Code
- Mobile number
- Home number
- Office number

**-ADDITIONAL INFO**

**OTHER INFO (OPTIONAL)**

Customer id	Language	Custom field <small>255 characters</small>	Country code
Mobile number	Home number	Office number	

**Shipping address** (optional), with the following fields:

- Name
- Street
- City
- Postal Code
- Province

- Country
- Additional Information

SHIPPING ADDRESS (OPTIONAL)

Name	Street	City	Postal code
Province	Country	Additional info <small>50 characters</small>	

**Billing address** (optional), with the following fields:

- Name
- Street
- City
- Postal Code
- Province
- County
- Additional information

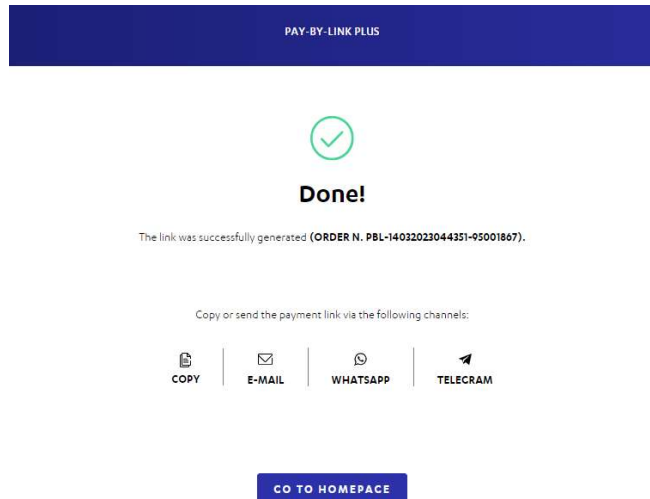
It's possible to set same fields of shipping data.

BILLING ADDRESS (OPTIONAL)

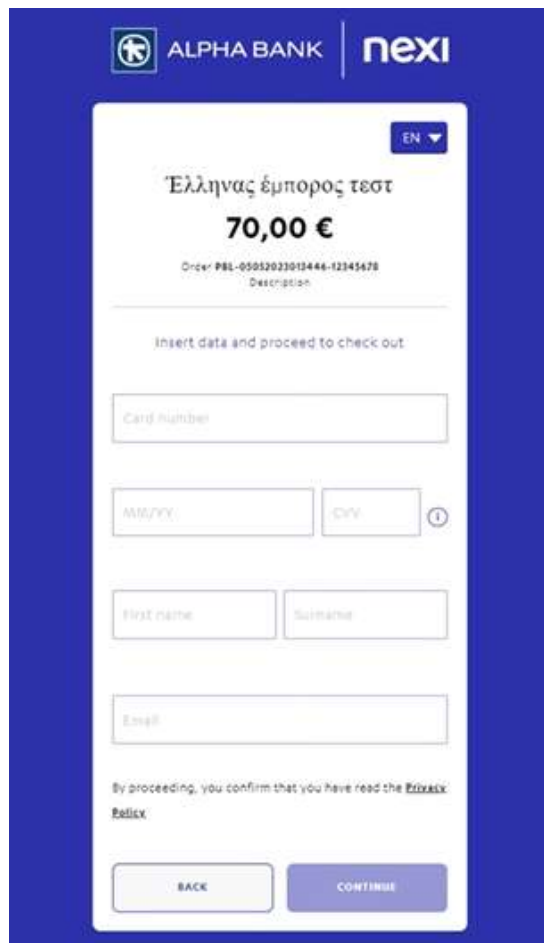
Set same fields of shipping data

Name	Street	City	Postal code
Province	Country	Additional info <small>50 characters</small>	

By clicking on “Confirm”, the link is generated and ready to be copied or to be sent by e-mail or other sharing channels to the customer. The choices available are: Copy, e-mail, Whatsapp, Telegram.



Below is an example of a hosted payment page (HPP) that is shown to the customer:



Once the customer has entered all the required data, a summary page is shown where he/she can confirm the payment:



### 5.3.2 M.O.T.O.

The merchant has the option of handling phone and/or mail orders with XPay (M.O.T.O. - Mail Order, Telephone Order).

For this solution, the Back Office framework is the same as before, except for the following difference: this type of sale requires the merchant to make the payment with credit card information received from the buyer.

After selecting “M.O.T.O.” menu, the following page appears, where the merchant must enter:

- Amount (euro)
- Credit card information:
  - PAN
  - expiring date
  - security no./CVV
  - name of cardholder (optional)
- Cardholder's e-mail address (optional).
- Description (optional)

The merchant can click on "Confirm" or enter additional information.

**Create a MOTO payment**

Terminal ID: 95001868

Order id: MOTO-01022023042740-190894 ⓘ Amount (euro)

Expiring date: mm/yyyy Cvv

PAN

Cardholder name (optional) Cardholder email (optional) Description (optional) 50 characters

➔ + ADDITIONAL INFO

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**Other info** (optional), with the following fields:

- Costumer ID
- Custom field
- Country code
- Mobile number
- Home number
- Office number

-ADDITIONAL INFO

OTHER INFO (OPTIONAL)

Customer id ⓘ Custom field ⓘ Country code Mobile number

Home number Office number

255 characters

**Shipping address** (optional), with the following fields:

- Name
- Street
- City
- Postal Code
- Province
- Country
- Additional Information

SHIPPING ADDRESS (OPTIONAL)

Name	Street	City	Postal code
Province	Country	Additional info <small>50 characters</small>	

**Billing address** (optional), with the following fields:

- Name
- Street
- City
- Postal Code
- Province
- County
- Additional information

It's possible to set same fields of shipping data.

BILLING ADDRESS (OPTIONAL)

Set same fields of shipping data

Name	Street	City	Postal code
Province	Country	Additional info <small>50 characters</small>	

By clicking on “Confirm”, the MOTO transaction is sent to Authorization.




**Done!**

The transaction was successfully executed

Order ID <b>MOTO-05052023014620-740325</b>	Auth code <b>951749</b>
Amount <b>50 EUR</b>	Date <b>05/05/2023-13:49:25</b>
Cardholder Name .	

**5.4 Profile**

It's possible to click on the button  to display information on the logged-in user.



A page with name, e-mail and masked password is shown and from this section you can change your password.

**Hello Victoria!**

Email	User type	Password
victoria.watkins@example.com	Admin	*****

[CHANGE PASSWORD](#)

It's necessary to follow the process described, enter your current password, new password and re-enter it again.

**Change password**

Current password

New password

**New password must contains from 8 to 20 characters:**

- at least one lowercase character
- at least one uppercase character
- at least one number
- at least one special character ( ~ ! @ # \$ % ^ \* ( ) - \_ = + { } | ; : , < > / ? " ' )

Retype new password

CANCEL

CONFIRM