



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>
<i>Version 1.1</i>	<i>Version with the processing rules section</i>	<i>19/12/2023</i>
<i>Version 1.2</i>	<i>Fix and adjustments to processing rules</i>	<i>08/01/2024</i>
<i>Version 1.3</i>	<i>Update for back-office v1.7 version</i>	<i>03/06/2025</i>
<i>Version 1.4</i>	<i>Update for expired authorizations</i>	<i>20/06/2025</i>
<i>Version 1.5</i>	<i>Update developer portal URL</i>	<i>23/06/2025</i>
<i>Version 1.6</i>	<i>Adjustments on INDEX</i>	<i>29/07/2025</i>

<i>Version 1.7</i>	<i>Added IRIS Payments – Only for Greek Merchants</i>	<i>15/10/2025</i>
<i>Version 1.8</i>	<i>Corrections from Greece on Installments – Only for Greek Merchants - and updates with new features on Backoffice 1.7</i>	<i>19/12/2025</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.T.O. (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 CSEE 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 different languages and a merchant can change the language through the profile page, that allows to change languages.

The supported languages are:

- Bosnian
- Czech
- German

- Greek
- English
- Croatian
- Hungarian
- Italian
- Polish
- Romanian
- Slovak
- Slovenian
- Albanian
- Serbian

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

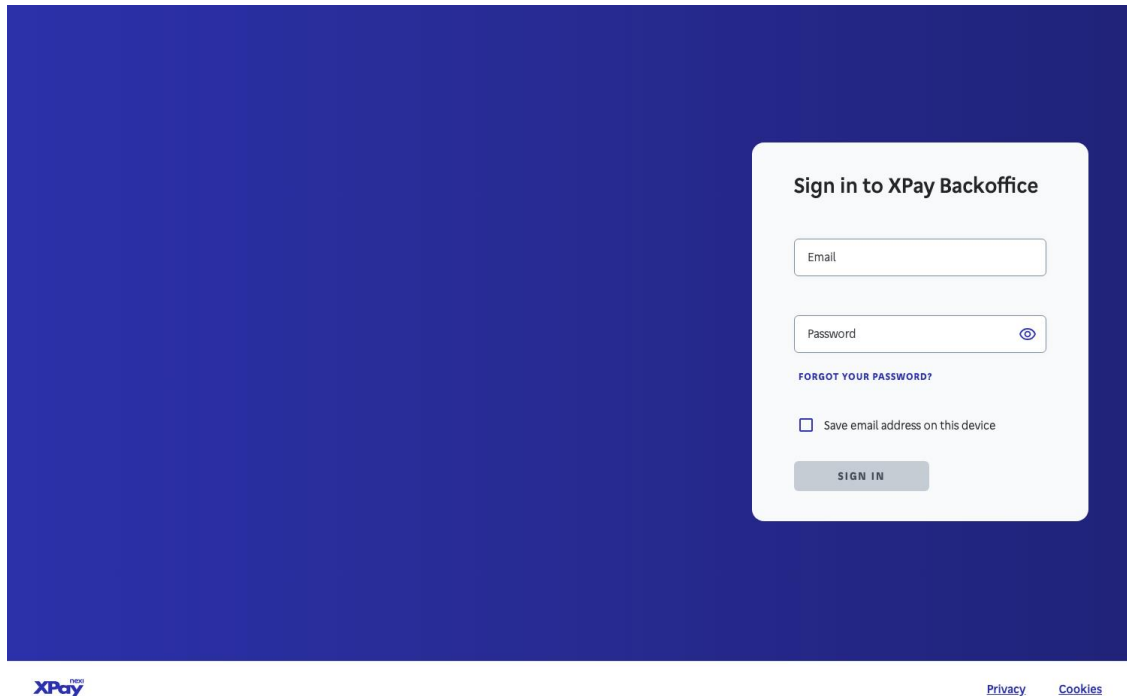
In a nutshell:

Main functionalities	Admin	Operator	Viewer
View orders/operations	X	X	X
Do capture/ refund/ void / cancel capture 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	-	-

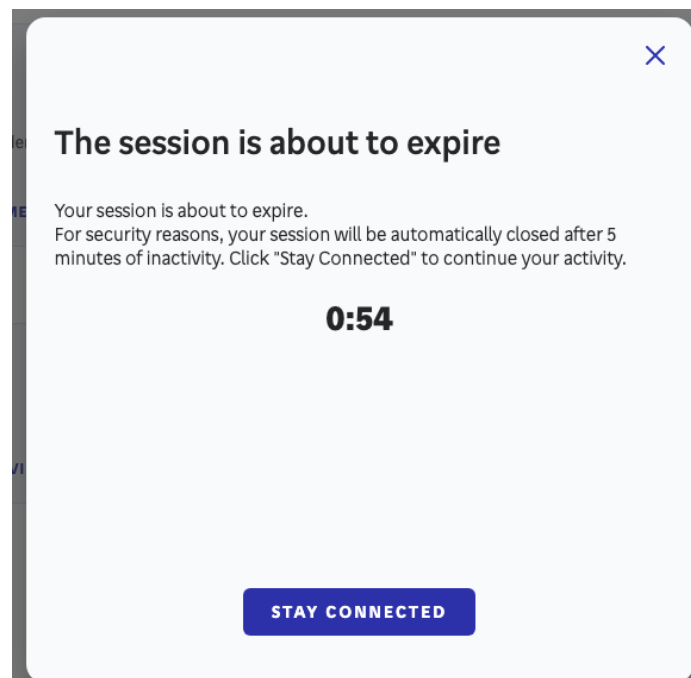
Features not available to the various profiles will not be displayed or clickable.

3.2 Login

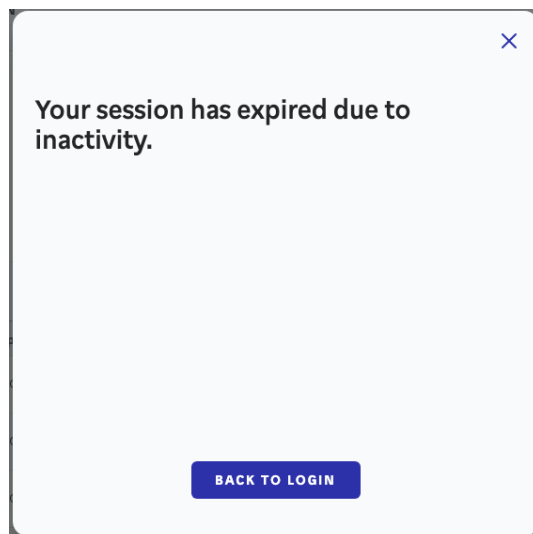
To access the portal, simply enter Username (e-mail address that has been declared during the onboarding for the first access or the one defined in the Backoffice) and password as in the image below:



If no operation is performed for 5 minutes, the Backoffice session will expire and will return to the login page. 1 minute before the expiration, a popup appears allowing you to restart the session.



After the minute has passed, a popup will appear warning the user that the session has expired



3.3 Retrieve credentials

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

1. Click the 'Forgot your password?' link on the Login Page
2. Enter the email address you sign up with
3. Click "Continue"

Reset Password CLOSE X


Reset your password

Enter the email address associated with your account and we'll send you a link to reset your password.

Email

CANCEL CONTINUE

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



Done!

We have sent an email to *****@gmail.com containing further instructions for resetting your password.

If you haven't received the email, please check your spam folder, try using a different email address, or contact customer support.

CLOSE

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

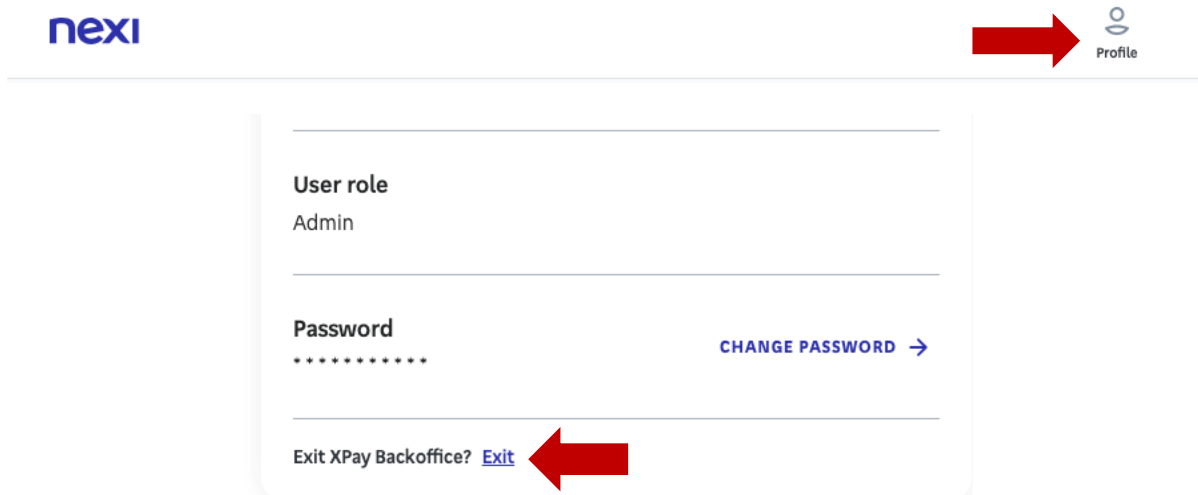
It is possible to make five login tries by entering the wrong password. After 5 incorrect login requests, the service is suspended for 3 hours (authentication is not allowed). If the password has expired, you will be redirected to the change password page when logging in.

3.4 Logout

The Logout Function allows you to log out of the Back Office.

To logout, you need to perform the following steps:

1. Click “Profile”
2. Click “Exit”

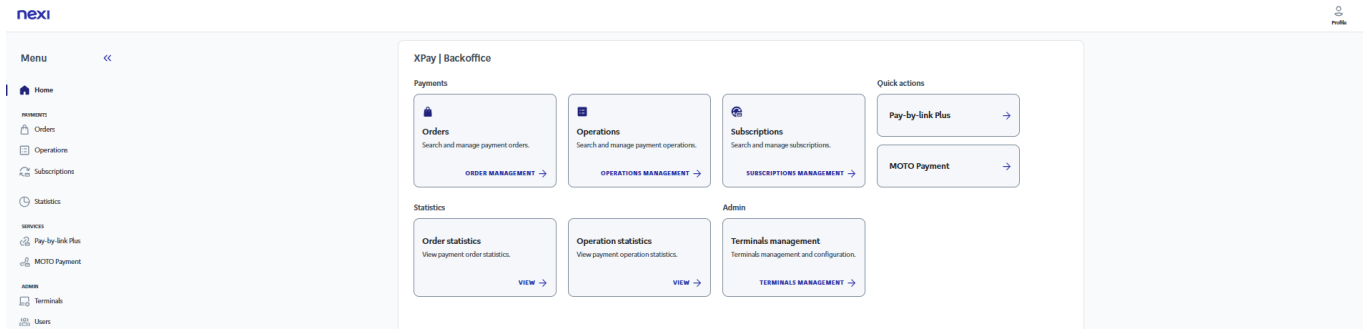


For shared PC/workstations it is recommended to logout to leave the Back Office. The session ends automatically after 5 minutes.

4. Back Office Structure

The Back Office allows authorized users to perform various functionalities, which are displayed in a vertical 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
- Payments
 - Orders
 - Operations
 - Subscriptions
 - Statistics
- Services
 - Pay-by-link Plus
 - MOTO Payment
- Admin
 - Terminals
 - Users
- Profile
 - User Profile
 - Language

5. Functionalities

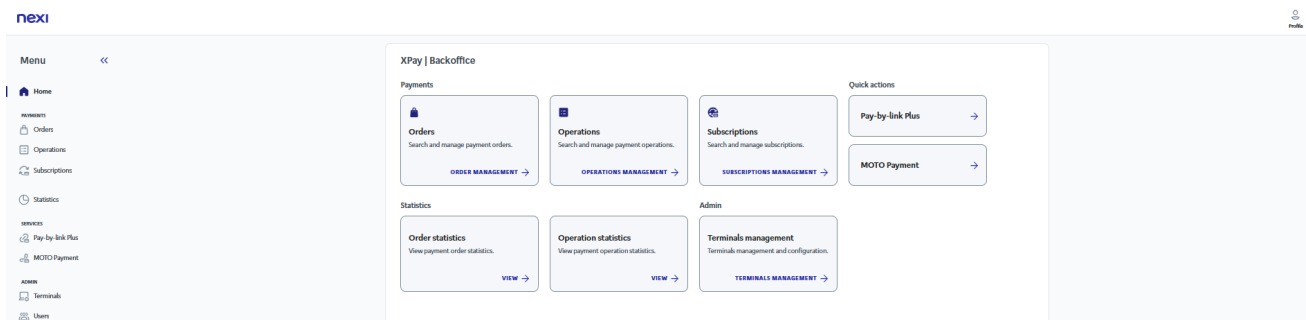
The following chapter provides a description of the features made available by the portal.

Some sections are only visible and clickable from specific profiles (refer to paragraph 3).

Menu	Sub-menu	Description
Home	-	It allows quick access to some parts of the backoffice, such as the order or operations page, the terminal section, and quick actions such as Pay-by-link Plus and MOTO
Payments	Orders	It allows the search of all orders, either via filters or in list form, and to view the details for each order.
Payments	Operations	It allows the search of all operations, either via filters or in list form, and to view the details for each operation.
Payments	Subscriptions	It allows to manage recurring payments, allowing customers to be charged at regular intervals without re-entering their card details.
Payments	Statistics	It allows merchants to have reported data on transaction such as order count, total authorized amount and total captured amount. Additionally, we have the tab 'Operations' where operations count is reported, subdivided for terminal.
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	MOTO Payment	It is intended for merchants who need to handle telephone or mail transactions via Back Office.
Admin	Terminals	It allows customize the terminal configurations.

Admin	Users	Settings and information associated with a user. From this section, the Admin can also create new users.
Profile	User Profile	It contains different informations on the profile such as profile name, email, user role and password.
Profile	Language	It gives the chance to choose the language of the Back Office.

5.1. Home



The homepage is composed of box's that provide quick access to sections of the backoffice.

5.2. Orders

5.2.1. Orders Management

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 by clicking the “Filter” button, opening a popup

Order Management

							EXPORT	FILTER
Date and time	Order ID	Order amount	Authorized amount	Captured amount	Description	Additional info		
10/12/2025 23:14:23	MOTO-1411202509193	€1.00	€1.00	€1.00	-	-		→
10/12/2025 23:14:23	MOTO-1411202509193	€1.00	€1.00	€0.00	-	-		→

Filters Orders ✕

Period of Time


From To

Order

Order ID

Custom Field

Status

RESET SEARCH 


APPLY FILTERS

Amount

Min

Max

Amount Type

RESET SEARCH 

APPLY FILTERS

The popup 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.
Status	Combo box	It can be: <ul style="list-style-type: none"> - To Capture - Captured
Min	Numeric	Minimum value in the range within which to search for the order. This field is related to the amount type specified.
Max	Numeric	Maximum value in the range within which to search for the order. This field is related to the amount type specified.
Amount Type	Combo box	It can be: <ul style="list-style-type: none"> - Order amount - Authorized amount - Captured amount <p>It is disabled until both Min and Max are entered</p>

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

Once the “Apply Filters” button is clicked, the system will display all orders that match the selected criteria.

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”)
- Additional info


Date ↕	Order ID ^	Order amount ↕	Authorized amount ↕	Captured amount ↕	Description ↕	Custom fields ↕	
21/05/2025 02:19:16	CC-21052025011831-657677785	€0.00	€0.00	€0.00	-	-	→
21/05/2025 02:21:41	CC-21052025012041-567408262	€0.00	€0.00	€0.00	Test BackOffice	Test Pastabar	→
20/05/2025 14:02:43	MOTO-20052025010155-853261	€10.00	€10.00	€10.00	-	-	→

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 ↕
26/11/2025 11:58:32	PBL-26112025115822
24/11/2025 11:49:35	PBL-24112025114916
19/11/2025 18:48:16	PBL-19112025064750000000
19/11/2025 18:46:24	PBL-19112025064605

The list may consist of up to 10 highlights per page; if there are more, the user can upload more through pagination

27/05/2025 15:17:23	oid2025527161723	€10.00	€0.00	€0.00	test GRPC	weekend promotion	→
27/05/2025 08:09:01	oid2025527991	€10.00	€0.00	€0.00	test GRPC	weekend promotion	→
							

21/05/2025 02:30:28	MOTO-21052025012941-101135	€10.00	€0.00	€0.00	-	-	→
21/05/2025 02:32:55	MOTO-21052025013154-126955	€1.00	€0.00	€0.00	Test BackOffice	Test BackOffice	→
							

If no order matches the Search criteria entered in the Search fields, an image will be displayed.



- - No results found with the current filters - -

- - Try again with different filters - -

5.2.2 Order Details

26/05/2025 10:31:53 oid2025526113153 €10.00 €0.00 €0.00 test GRPC weekend pro 

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

- Order summary
- Customer info
- Plan

5.2.2.1 Order Summary

[← ORDERS](#) Order Detail

Order - MOTO-02122025094527-179316

[ORDER SUMMARY](#) [CUSTOMER INFO](#) [PLAN](#)

Order Summary

Date	Order amount	Authorized amount	Captured amount	Description
02/12/2025 09:47:12	€1.00	€1.00	€1.00	-

Custom fields

No data available

Operations


Channel	Date	Operation Type	Amount	Payment Instrument	Status
BACKOFFICE	02/12/2025 09:47:12	AUTHORIZATION	€1.00	VISA 459598*****4993	EXECUTED ... →

This section shows the custom fields set by the merchant during the order creation. If the merchant haven't set any custom field, 'No data available' is reported.

[ORDER SUMMARY](#) [CUSTOMER INFO](#) [PLAN](#)

Order Summary

Date	Order amount	Authorized amount	Captured amount	Description
02/12/2025 09:47:12	€1.00	€1.00	€1.00	-

Custom fields 

No data available

Operations

Channel	Date	Operation Type	Amount	Payment Instrument	Status
---------	------	----------------	--------	--------------------	--------

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"> • ECOMMERCE - cardholder initiated operation through an online channel • BACKOFFICE - merchant initiated operation. It includes post operations and MIT
Date and Time	Operation Time
Operation	It indicates the purpose of the request: <ul style="list-style-type: none"> • AUTHORIZATION¹ - any authorization with explicit capture • CAPTURE - a captured authorization or an implicit captured payment • VOID - reversal of an authorization • REFUND - refund of a captured amount • CANCEL - the rollback of a capture
Amount	Operation amount in the payment currency
Payment Instrument	PAN
Status	Transaction output: <ul style="list-style-type: none"> • AUTHORIZED - Payment authorized • EXECUTED - Payment confirmed, verification successfully executed • DECLINED - Declined by the Issuer during the authorization phase • DENIED_BY_RISK - Negative outcome of the transaction risk analysis • THREEDS_VALIDATED - 3DS authentication OK or frictionless • THREEDS_FAILED - cancellation or authentication failure during 3DS • PENDING - Payment ongoing. Follow up notifications are expected • CANCELED - Canceled by the cardholder • VOIDED - Online reversal of the full authorized amount • REFUNDED - Full amount refunded • FAILED - Payment failed due to technical reasons
Action	It can be:

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

	<ul style="list-style-type: none"> • Capture • Refund • Cancel Refund • Void • Cancel capture
Details	Clicking on the arrow it's possible to view the details of the operation

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"> • Capture • Void
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
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.

Operations						
Channel	Date	Operation Type	Amount	Payment Instrument	Status	
BACKOFFICE	22/05/2025 14:44:04	AUTHORIZATION	CZK 33.00	VISA 401200*****0089	FAILED	...
BACKOFFICE	22/05/2025 14:44:36	AUTHORIZATION	CZK 33.00	VISA 401200*****0089	FAILED	...
BACKOFFICE	22/05/2025 14:44:43	AUTHORIZATION	CZK 33.00	VISA 401200*****0089	AUTHORIZED	...

CAPTURE
VOID

If the status operation is "failed", no action can be performed.

Operations						
Channel	Date and time	Operation	Amount	Payment Instrument	Status	Action Details
ECOMMERCE	04/12/2025 15:54:31	AUTHORIZATION	€1.00	-	NO ACTION AVAILABLE	...

Clicking on the arrow 'Details' it's possible to view the details of the operation in the popup:

- Summary**, the following data are displayed:
 - Terminal ID (TML)
 - Order ID
 - OID - Omnichannel ID
 - Channel
 - Operation
 - Status
 - Date and time
 - Payment Method
 - Payment Instrument
 - End to End ID - It is defined by the schemes to uniquely identify the transaction. Required for schemes reconciliation purposes.
 - Operation Amount
- Additional info**, contains further information about operations (such as: Masked Pan / Authorization Code / Authorization Result Code / Description / Card Country / 3DS / RRN / ISO Message Code, Schema TID, Status, Transaction ID (Unique identifier of the third-party transaction, useful for reconciliation and support), Invoice ID and Number of Installments..

3. **Security Warnings**, notify to the merchant that create the orders that some field could not be compliant with schemes security.

Operation - 528090407753851429

Summary

Terminal ID	Order	OID
OE000004	MOTO-22052025034351-119222	528090407753851429
Channel	Operation Type	Status
BACKOFFICE	AUTHORIZATION	AUTHORIZED
Date	Payment Method	Payment Instrument
22/05/2025 14:44:43	CARD	VISA ***0089
End to End ID	Operation Amount	
528090407753851429	CZK 33.00	

Security Warnings

No data available

IRIS Payment – Additional Information (Greek Market)

For the Greek market, when **IRIS Payment** is used, the application displays two additional informational fields:

- **Section: SUMMARY**
End-to-End ID – A unique identifier assigned to each IRIS transaction.
This ID is used to trace and track the payment throughout the entire processing flow.
- **Section: ADDITIONAL INFO**
Transaction ID – A unique identifier assigned by the system to each transaction.
This value is primarily used by reconciliation and back-office teams for matching and reporting purposes.

- Failed transaction with IRIS

Operation - 19d9a6ba-404b-4835-88dc-7b6ec7f5c589				
Summary				
Terminal ID 97000799	Order 1760430185611	OID 19d9a6ba-404b-4835-88dc-7b6ec7f5c589	Channel -	Operation Type AUTHORIZATION
Status FAILED	Date 14/10/2025 11:23:34	Payment Method APM	Payment Instrument IBIS	End to End ID -
Operation Amount €0.30				
Additional Info				
MaskedPan -	AuthorizationCode -	Authorization Result Code -	Description -	CardCountry -
3DS -	Rrn -	MessageReasonCode -	Schema TID -	Status -
Transaction ID ⓘ				
-				
Security Warnings				
No data available				

- Canceled transaction with IRIS

OPERATIONS

Operation Detail

Operation - 763781385065952869

Summary

Terminal ID	Order	OID	Channel	Operation Type
97000799	vsale-4077	763781385065952869	ECOMMERCE	AUTHORIZATION
Status	Date	Payment Method	Payment Instrument	End to End ID
CANCELED	11/10/2025 13:02:00	APM	NOT_DEFINED NOT_DEFINED	-
Operation Amount				
€9.85				

Additional Info

MaskedPin	AuthorizationCode	Authorization Result Code	Description	CardCountry
-	-	-	-	-
3DS	BIN	MessageReasonCode	Schema ID	Status
-	-	-	-	-
Transaction ID				
-				

Security Warnings

No data available

XPAY

Privacy

Cookies

5.2.2.1.1 Capture

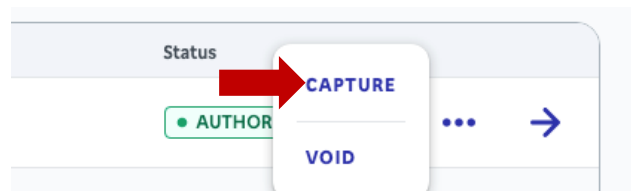
It allows you to request the payment schemes to account for the defined amount, i.e. to arrange for the crediting of the purchase order amount to the merchant (with the simultaneous debiting, to the consumer, of the current account linked to the card used).

This action can be performed on “Authorized orders”.

Authorized transactions that are not finalized (accounted for) within six days from the initial authorization date are automatically cancelled by a scheduled process. This process runs during the subsequent night after the last accounting day from the authorization date, cancelling authorizations for which the six-day validity period has expired.

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: 0.01
- Max Amount: authorized Amount
- Default Amount: max Amount/ authorized Amount

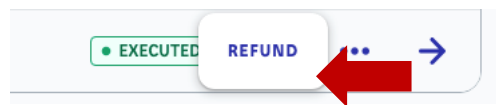
A screenshot of a 'Capture' dialog box. The title is 'Capture'. Below the title, it says 'After confirmation it will no longer be available to capture the order'. There is a text input field labeled 'Capture Amount' with the value '0,10'. At the bottom, there are two buttons: 'CLOSE' and 'CONFIRM'. A red arrow points up to the 'Capture Amount' field, and another red arrow points left to the 'CONFIRM' button.

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.

5.2.2.1.2 Refund

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 11 months.

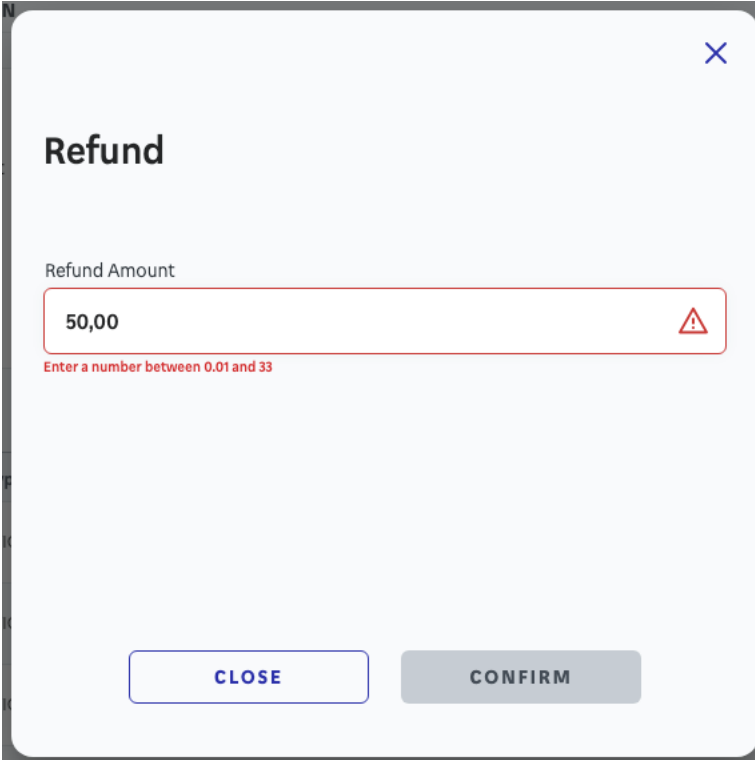


Once the order is selected, click on "Refund" and fill in the "transaction amount" field with the amount to be accounted for. Please consider:

- Min Amount: 0.1
- Max Amount: captured Amount
- Default Amount: max Amount/ captured Amount

A modal dialog box titled 'Refund' with a close button (X) in the top right corner. Below the title is the label 'Refund Amount' followed by a text input field containing the value '0,10'. A large red arrow points upwards to the input field. At the bottom of the dialog, there are two buttons: 'CLOSE' and 'CONFIRM'. A red arrow points from the 'CLOSE' button towards the 'CONFIRM' button.

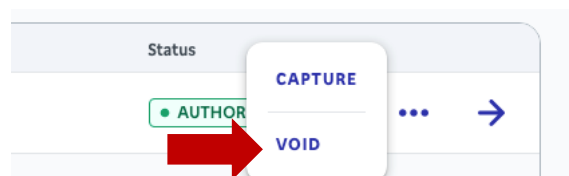
It is not possible to enter an amount greater than the residual captured amount. An error message with the correct range will be displayed in this case.



The image shows a 'Refund' modal dialog. At the top right is a close button (X). The title 'Refund' is centered. Below it, the label 'Refund Amount' is followed by a text input field containing '50,00'. To the right of the input field is a red warning triangle icon. Below the input field, a red error message reads: 'Enter a number between 0.01 and 33'. At the bottom, there are two buttons: 'CLOSE' (outlined) and 'CONFIRM' (solid grey).

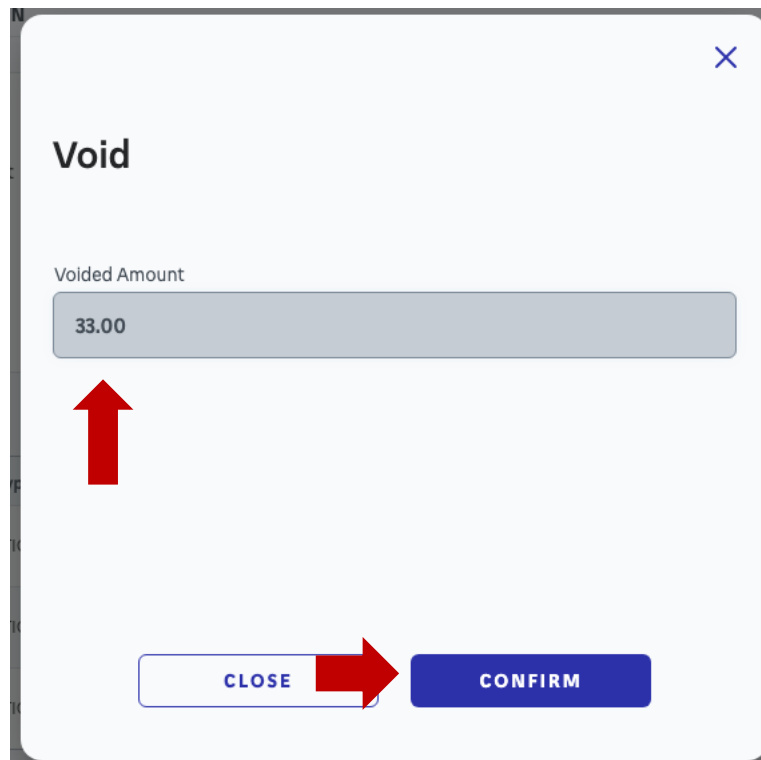
5.2.2.1.3 Void

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:

- Default Amount: authorized Amount



Void

Voided Amount

33.00

CLOSE CONFIRM

5.2.2.2 Customer

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

- Name
- Email
- Mobile phone
- Business phone

Order - MOTO-1411202509193

ORDER **CUSTOMER**

Customer info

Name	Email	Mobile Phone	Business Phone
-	-	-	-

Billing address

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

Shipping address

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

5.2.2.2.1 Shipping Address

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

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

Order - btid2384999

ORDER SUMMARY **CUSTOMER INFO**

Customer info

Name	Email	Mobile Phone	Business Phone
Mario	mario@nexi.it	3200000000	3200000000

Billing address

Name	Street	Additional info	City	Postal code
Giuseppe Rossi	Via Roma, 1	Piano terra, Scala A	Bormio	40124
Province	Country			
VA	ITA			

Shipping address

Name	Street	Additional info	City	Postal code
Giuseppe Verdi	Via Roma, 1	Piano terra, Scala B	Bologna	40124
Province	Country			
BO	ITA			



5.2.2.2.2 Billing Address

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

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

Order - btid2384999

ORDER SUMMARY CUSTOMER INFO

Customer info

Name	Email	Mobile Phone	Business Phone
Mario	mario@nexi.it	3200000000	3200000000

Billing address

Name	Street	Additional info	City	Postal code
Giuseppe Rossi	Via Roma, 1	Piano terra, Scala A	Bormio	40124
Province	Country			
VA	ITA			

Shipping address

Name	Street	Additional info	City	Postal code
Giuseppe Verdi	Via Roma, 1	Piano terra, Scala B	Bologna	40124
Province	Country			
BO	ITA			

5.2.2.3 Plan

The plan section reports information on subscription payment plans.

If no subscription has been offered by the merchant, this section display 'There are no subscription payment plans for this order.'

Order - PBL-04122025035438

[ORDER](#) [CUSTOMER](#) [PLAN](#)

There are no subscription payment plan for this order.

[Privacy](#)[Cookies](#)

5.3 Operations

5.3.1 Operations 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 by clicking the “Filter” button, opening a popup.

Operations Management

[EXPORT](#) [FILTER](#)

Date and time	Order ID	Operation	Amount	Status	
11/12/2025 09:47:20	MOTO-1411202509193	REFUND	€1.00	REFUNDED	...
05/12/2025 14:58:54	MOTO-05122025025217-149479	AUTHORIZATION	€1.00	EXECUTED	...

Operation filters

Date range

From

DD/MM/YYYY

To

DD/MM/YYYY

Operation

Operation ID

Order ID

Operation

RESET CRITERIA

APPLY FILTERS

Amount

Min

Max

Status

Advanced Filters

RESET CRITERIA

APPLY FILTERS

The popup 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.
Operation ID	Max 27crt alpha numeric	Merchant operation id, unique in the merchant domain.
Order ID	Max 27crt alpha numeric	Merchant order id, unique in the merchant domain.
Operation	Combo box	Here the operation type can be set among the following: <ul style="list-style-type: none"> - Authorization - Capture - Refund - Cancel - No show - Incremental - Delay charge - Card verification - Card check - Void
Status	Combo box	It can be: <ul style="list-style-type: none"> - Authorized - Executed - Declined - Denied by risk - Denied - Threeds validated - Threeds failed - Pending - Canceled - Voided - Refunded - Failed

Min	Numeric	Minimum value in the range within which to search for the order. This field is related to the amount type specified.
Max	Numeric	Maximum value in the range within which to search for the order. This field is related to the amount type specified.
Amount Type	Combo box	

There is also a subsection entitled 'Advanced Filters' which gives to the merchant the possibility to set additional filters.

Here the merchant can set the following fields:

- Channel (Ecommerce, POS, Backoffice)
- Channel Detail
- Payment Method (All, APM, Apple Pay, Google Pay, Cards, Visa, Mastercard, Amex, JCB)
- Contract ID
- Acquirer Agreement

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

Filters Orders [X]

Period of Time

From To

Order

Order ID Custom Field

Status

RESET SEARCH [refresh icon] **APPLY FILTERS**

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

Operation filters

Amount

Min

Max

Status

Advanced Filters

RESET CRITERIA

APPLY FILTERS

The following are the details available for each operation:

- Date and time in which the order has been created
- Order ID
- Operation
- Amount
- Status

Operations Management

[EXPORT](#)[FILTER](#)

Date and time	Order ID	Operation	Amount	Status	
11/12/2025 09:47:20	MOTO-1411202509193	REFUND	€1.00	REFUNDED	...
05/12/2025 14:58:54	MOTO-05122025025217-149479	AUTHORIZATION	€1.00	EXECUTED	...
05/12/2025 14:46:21	MOTO-05122025024442-305645	AUTHORIZATION	€5.00	EXECUTED	...
05/12/2025 08:47:08	MOTO-05122025084509-463181	AUTHORIZATION	€5.12	EXECUTED	...

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.

The list may consist of up to 10 highlights per page; if there are more, the user can upload more through pagination

26/11/2025 12:05:01	PBL-26112025115822	AUTHORIZATION	€0.01	CANCELED	...	→
24/11/2025 11:56:00	PBL-24112025114916	AUTHORIZATION	€0.10	CANCELED	...	→
<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>→</div> </div>						

If no order matches the Search criteria entered in the Search fields, an image will be displayed.



-- No results found with the current filters --

-- Try again with different filters --

5.3.2 Operations details

Date and time	Order ID	Operation	Amount	Status	
11/12/2025 09:47:20	MOTO-1411202509193	REFUND	€1.00	REFUNDED	→

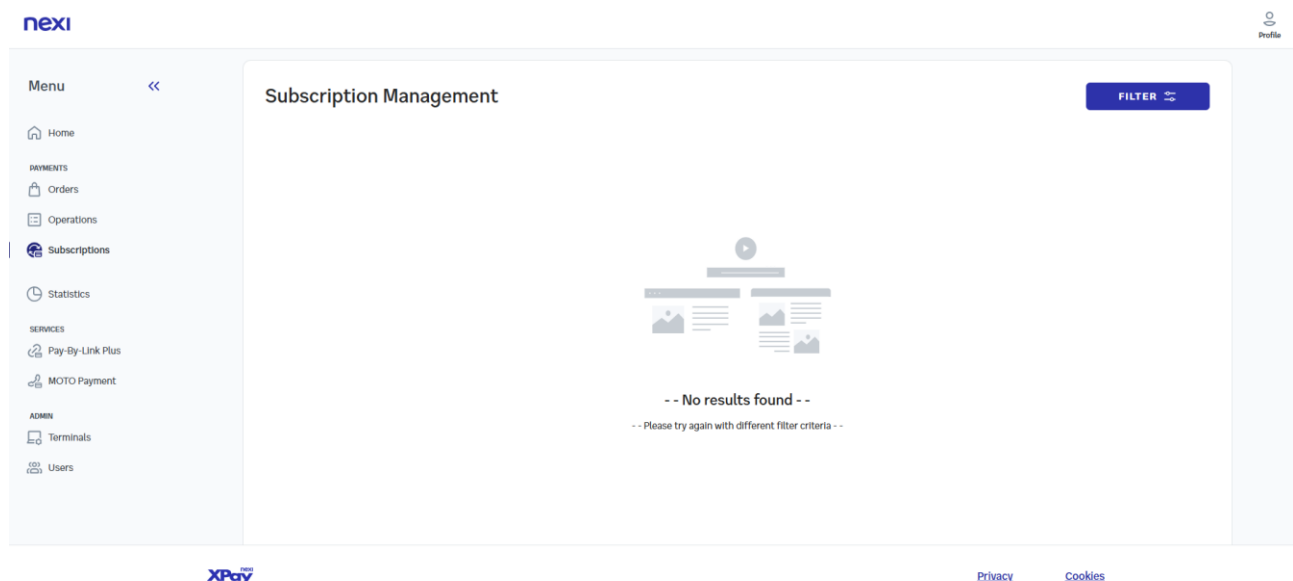
From the list of orders, by selecting the arrow, it is possible to view the following details per operation:

1. **Summary**, the following data are displayed:
 - a. Terminal ID (TML)
 - b. Order ID
 - c. OID - Omnichannel ID
 - d. Channel
 - e. Operation
 - f. Status
 - g. Date and time
 - 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. **Additional info**, contains further information about operations (such as: Masked Pan / Authorization Code / Authorization Result Code / Description / Card Country / 3DS / RRN / ISO Message Code, Schema TID, Status, Transaction ID (Unique identifier of the third-party transaction, useful for reconciliation and support), Invoice ID and Number of Installments..
3. **Security Warnings**, notify to the merchant that create the orders that some field could not be compliant with schemes security.

5.4 Subscriptions

This section allows the merchant to manage the subscriptions.



The Subscription Management section gives the possibility to filter the subscription with the button 'Filter', selecting them by Creation date, Order details and Amount.

Subscription filters ✕

Order

Order ID

Contract ID


Recurrence Type

Recurrence Status

Amount

Min

Max

RESET CRITERIA 

APPLY FILTERS

5.5 Statistics

The section statistics allows merchants to have reported data on transactions. This section is divided in two subsections, which are 'Orders' and 'Operations'.

5.5.1 Orders

In this section the orders are reported and the related fields displayed:

- Terminal
- Order count
- Total Authorized Amount
- Total Captured Amount

Statistics

ORDERS OPERATIONS

EXPORT FILTER

Terminal	Order Count	Total Authorized Amount	Total Captured Amount
T0000297	2	€0.00	€0.00

XPay Privacy Cookies

The merchant can also export the file in .xls format by clicking the button EXPORT. The file will be downloaded once the merchant have clicked on it.

Statistics

Statistics

ORDERS OPERATIONS

EXPORT FILTER

Terminal	Order Count	Total Authorized Amount	Total Captured Amount
T0000297	2	€0.00	€0.00

With the button 'Filter', the merchant can filter out the subscriptions based on the time period.

Order Filters

Time Period

From To

04/12/2025 - 04/12/2025

Order

Terminal ID
T0000297

RESET CRITERIA

APPLY FILTERS

5.5.2 Operations

In this section, The terminals are reported and the related fields displayed:

- Operation Type
- Number of Operations

The screenshot shows the 'Statistics' section of the Nexi Back Office Portal. The 'OPERATIONS' tab is selected, displaying a table with the following data:

Terminal	Operation Type	Number Of Operations
T0000297	AUTHORIZATION	2

The merchant can also export the file in .xls format by clicking the button EXPORT. The file will be downloaded once the merchant have clicked on it.

Statistics

The close-up view highlights the 'EXPORT' and 'FILTER' buttons. A red arrow points to the 'EXPORT' button, which is used to download the data in .xls format.

Terminal	Operation Type	Number Of Operations
T0000297	AUTHORIZATION	2

With the button 'Filter', the merchant can filter out the subscriptions based on the time period and on the Operation Type.

Operation Filters

Time Period

From

To

04/12/2025

04/12/2025

Operations

Terminal ID

T0000297

Operation Type

ALL

RESET CRITERIA

APPLY FILTERS

5.6 Admin

5.6.1 Terminals

The view of information changes based on the terminal that is selected within the select terminal id

Menu

Home

PAYMENTS

Orders

Operations

Subscriptions

Statistics

SERVICES

Pay-By-Link Plus

MOTO Payment

ADMIN

Terminals

Users

Terminal Management

Terminal ID: T0000297

SETTINGS

API KEYS

APM

VAS

PROCESSING RULES

Terminal ID (TML) T0000297 - E-COMMERCE

Payment Notifications

Send payment notifications

Enabled

Notification email

kalimero888@yopmail.com

Send customer payment notifications

Enabled

Payment capture

Capture type

Automatic

XPay

Privacy

Cookies

5.6.1.1 Settings

The following are the details available for each terminal:

Field	Description
Terminal ID	Unique Terminal identifier that made the authorization request

Payment notifications	<p>It can be:</p> <ul style="list-style-type: none"> - DISABLED - ENABLED <p>The payment notification can be set at terminal level and sent to a Merchant user email, indicated if enabled, in the next field.</p>
Notification Email	<p>Merchant email on which receive notifications. Only one email can be set.</p>
Send customer payment notifications	<p>It can be:</p> <ul style="list-style-type: none"> - DISABLED - ENABLED <p>Select whether you want to have the customer receive an email notification in case of payment confirmation.</p>
Payment Capture	<p>Configure the terminal's default accounting mode:</p> <ul style="list-style-type: none"> - Automatic: implicit confirmation of operations - Manual: explicit confirmation of operations - Deferred: automatic confirmation of transactions after the indicated number of days, maximum 7

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 “MANAGE”.

The following popup will be displayed:

Terminal Management

Terminal ID (TML) T0000297 - E-COMMERCE

Payment Notifications

Set the email address for receiving payment notifications (only one allowed) ⓘ

☐ NO ☒ YES

Notification email

kalimero888@yopmail.com

Send customers an email receipt after payment. ⓘ

☐ Disabled ☒ Enabled

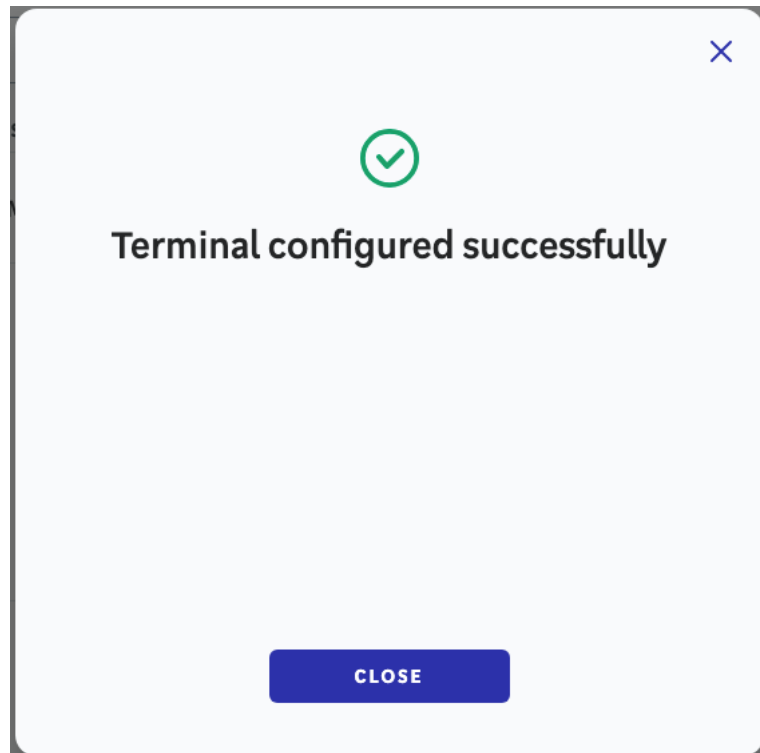
Payment capture

Capture type ⓘ

Automatic

SAVE

Once the configurations have been modified, click on “CONFIRM” to save the changes. A confirmation popup is displayed.



5.6.1.2 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
- Actions (Manage / Delete)

Manage Terminals

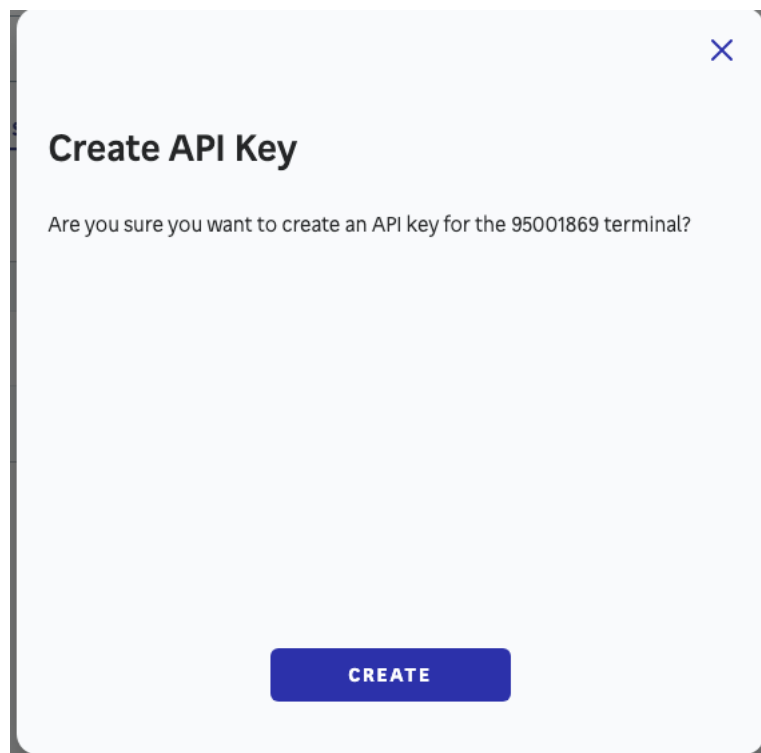
Terminal ID

95001869

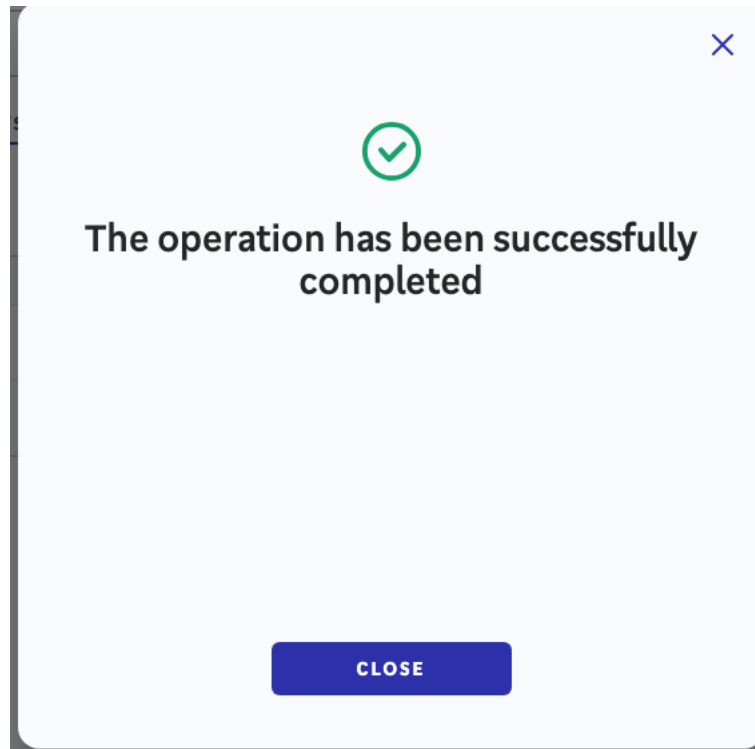
CONFIGURATIONS **API KEYS** PROCESSING RULES [CREATE NEW API KEY →](#)

ID	Actions
1	...
2	...

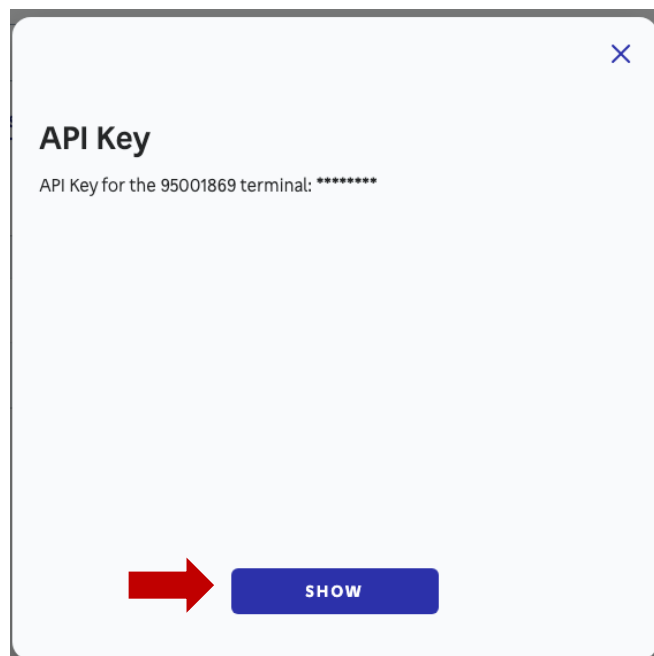
At the top right there is a “Create New Api Key” button for the creation of a new API Key. To create a new API Key, you click on ‘Confirm’.



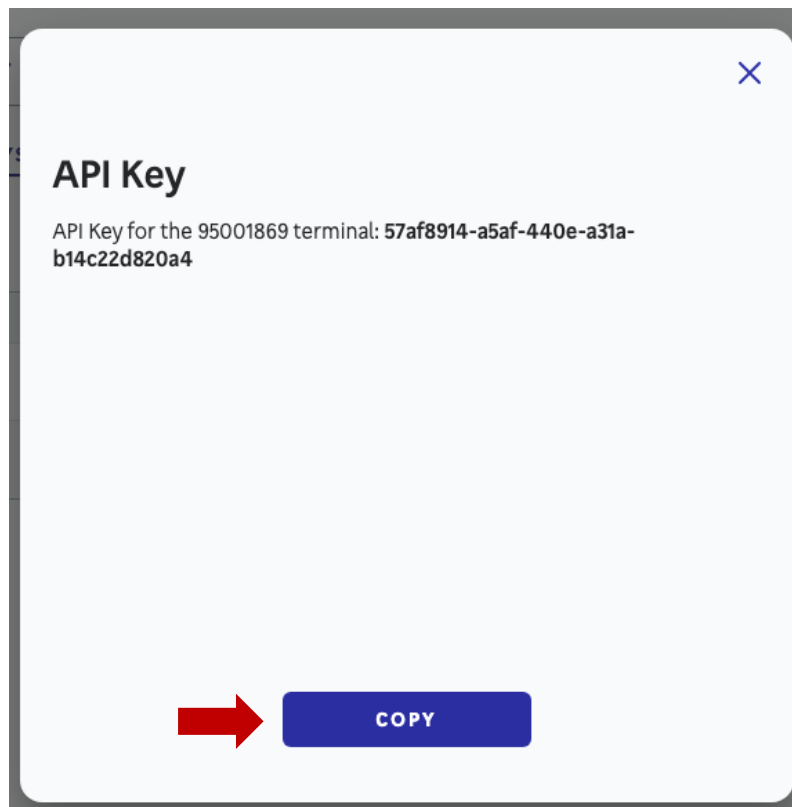
Once confirmed, a confirmation popup is displayed.



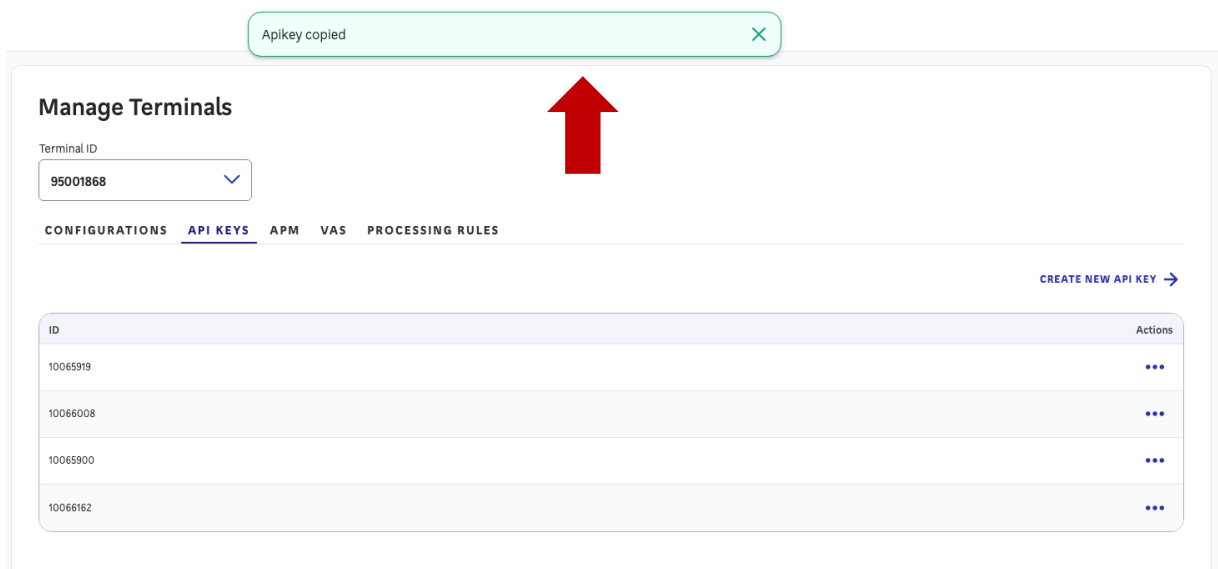
As the first action, there is an option to copy the api key, clicking on “Manage”



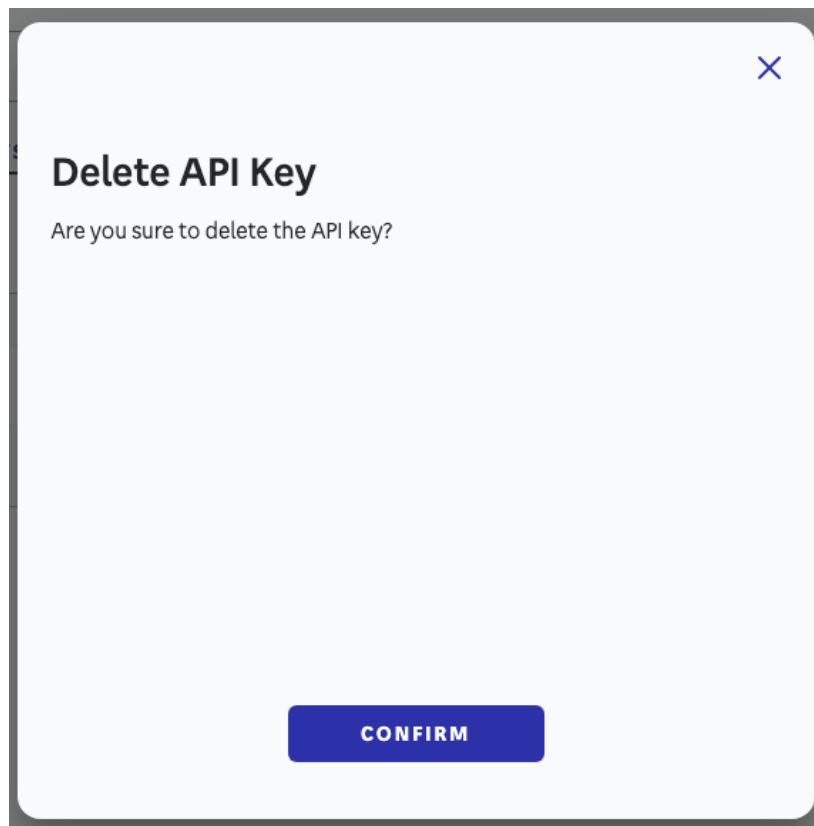
Click on “Show”



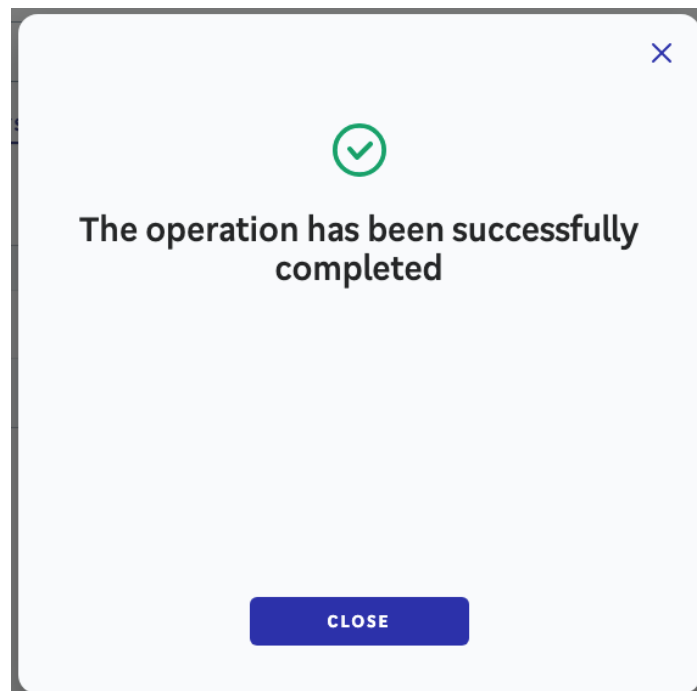
Click on “Copy” displays a message that says “Api key copied”



As the second action, there is an option to delete the api key, clicking on “Delete”



Once confirmed, a confirmation popup is displayed.



5.6.1.3 APM

This section display the available APMs for the merchant.

Each APM is displayed with:

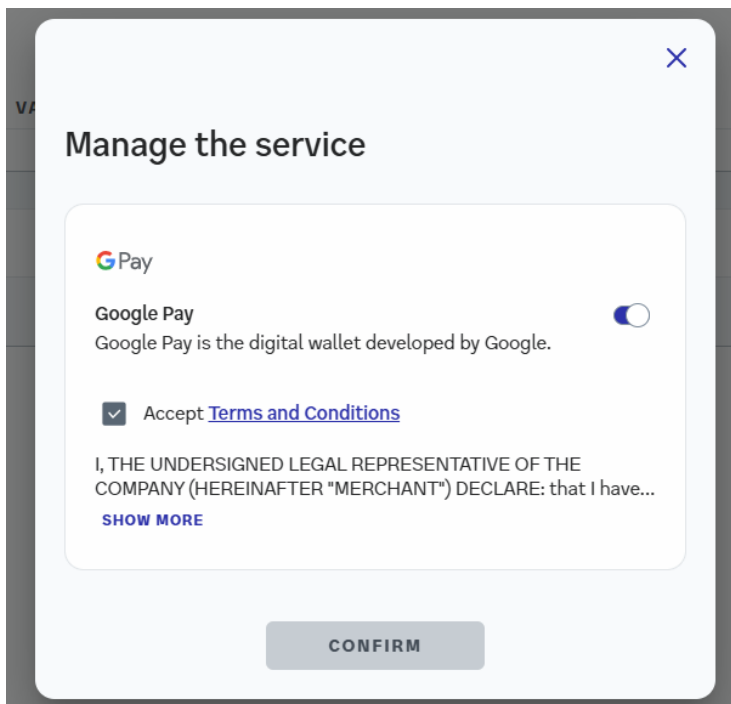
- Status – Enabled/Disabled
- Action – Enable/Manage

The screenshot shows the 'Terminal Management' page in the Nexi Back Office Portal. The page has a sidebar menu on the left with categories like 'Menu', 'PAYMENTS', 'SERVICES', and 'ADMIN'. The main content area is titled 'Terminal Management' and shows the 'Terminal ID: T0000297'. Below this, there are tabs for 'SETTINGS', 'API KEYS', 'APM', 'VAS', and 'PROCESSING RULES'. The 'APM' tab is active, displaying a table of available APMs.

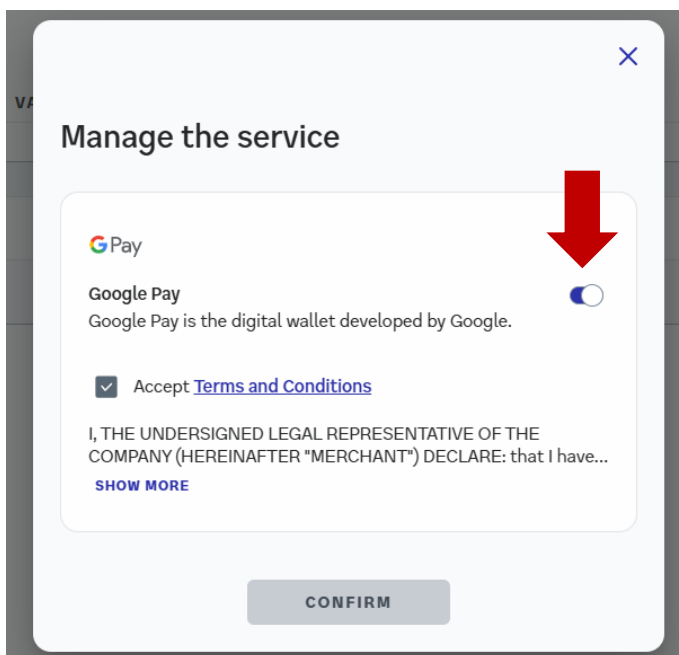
APM	Status	Action
Google Pay	DISABLED	ENABLE →
Apple Pay	ENABLED	MANAGE →

At the bottom of the page, there are links for 'Privacy' and 'Cookies'.

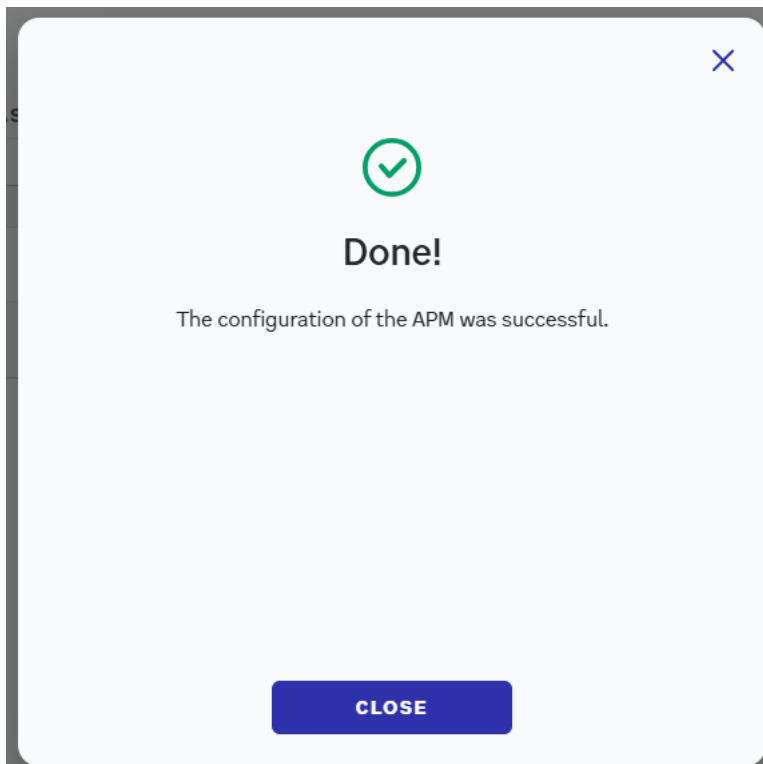
By clicking on the button 'Manage', a pop-up appears where the merchant can decide to enable or disable the APM.



Here, the merchant can enable or disable the APM by clicking on the button at the right of the APM chosen. When the merchant wants to activate an APM with status 'disabled' , 'Terms and Conditions' button has also to be ticked in order to confirm the operation.



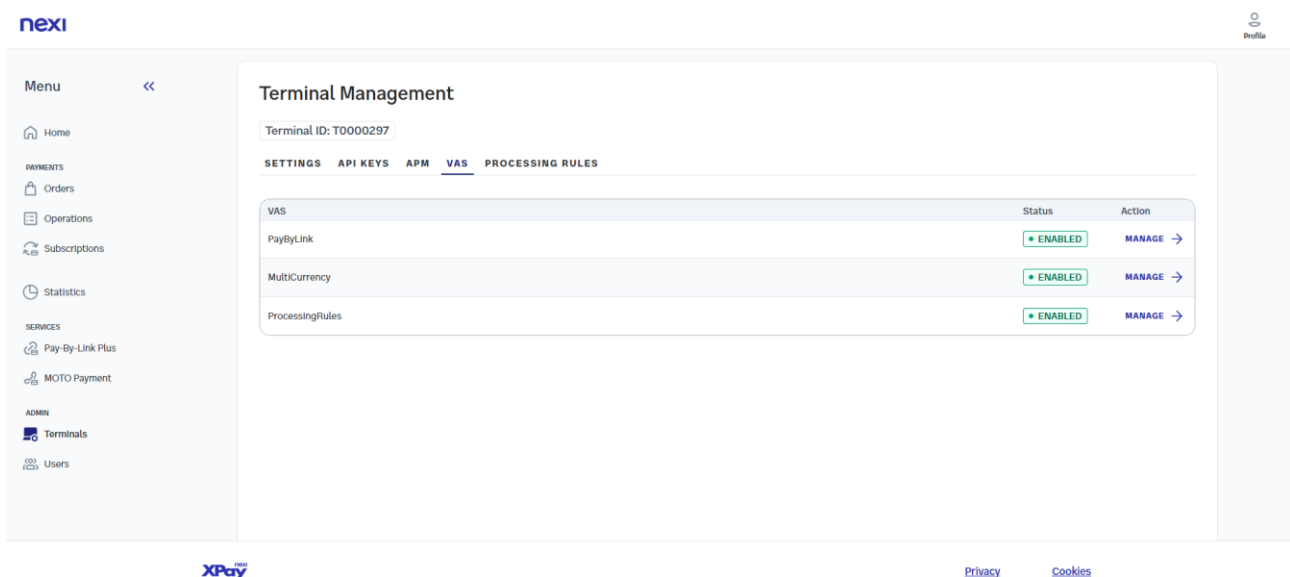
By clicking on 'Confirm', a confirmation pop-up is displayed.



5.6.1.4 VAS

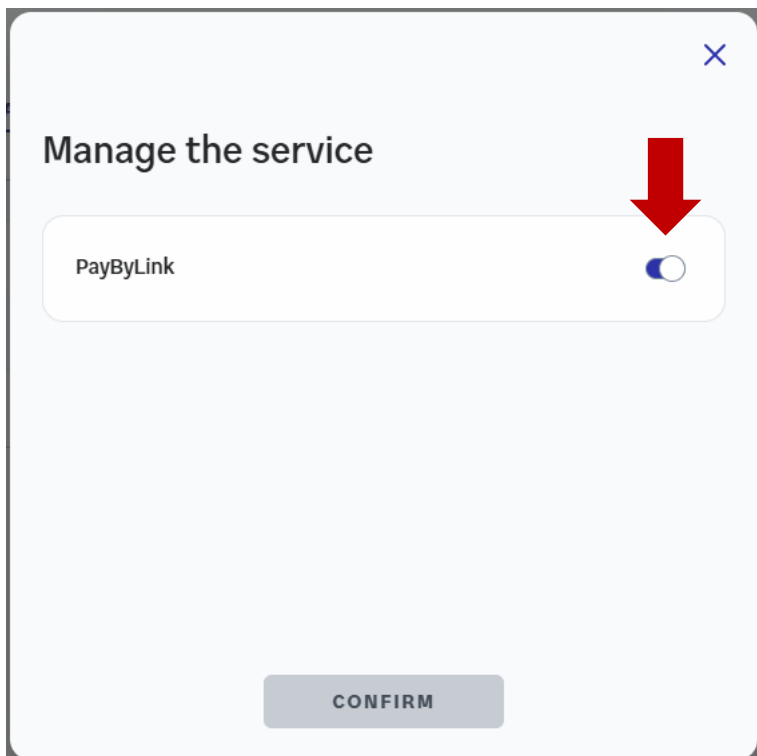
This section displays all the VAS available for the merchant. Each VAS is displayed with:

- Status - Enabled/Disabled
- Action – Manage/Enable

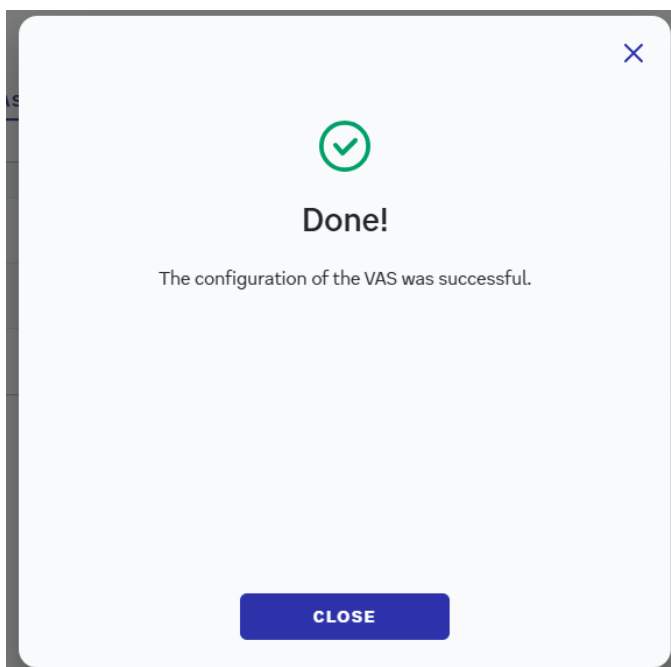


By clicking on the action 'manage', the merchant can disable the VAS.

A pop-up is displayed where, by clicking the button next to the VAS and clicking on button 'Confirm', the merchant can perform this action.



Once confirmed, a pop-up is displayed reporting the operation result.



5.6.1.5 Processing Rules

In that TAB, the Merchant can see all active/disable rules by creation date, rule name, rule type and status, as it follows:

Terminal Management

Terminal ID: E0000013

SETTINGS API KEYS APM VAS PROCESSING RULES

CREATE NEW RULE →

In addition, the Merchant can create, edit or delete any specific rule. Creating a new rule and modifying an existing rule have the same process.

By clicking on “Create New Rule”, it will open a new popup where it will be required to indicate the Rule Name, the Rule Type and the Status set to Enabled

Rule Settings ×

ENABLED ☒

Rule Name

Rule Type

▼

CREATE

When the Rule Type is entered, the Rule Details is displayed, a field in which to enter the value that corresponds to the Rule Type entered.

The screenshot shows a 'Rule Settings' modal window. At the top right is a close button (X). Below the title bar, there is a section with an 'ENABLED' toggle switch. Underneath, there are two input fields: 'Rule Name' and 'Rule Type'. The 'Rule Type' dropdown menu is open, showing 'Card Bin Block' as the selected option. Below the 'Rule Type' field, there is another input field labeled 'Card Bin Block'. At the bottom center of the modal is a 'CREATE' button.

Rule Name is a free field where it can be put any value. The field must be filled in order to enable the “Create” button

Rule Type is a menu composed by following choice:

- a) **Card Bin Block:** by selecting this rule type, it will open a new field called “Card Bin Block” where the merchant can insert the Bin number (First digits from the payment card number) to block, disabling transaction from it. Only numbers are accepted in the new field;
- b) **Single Pan Block:** by selecting this rule type, it will open a new field called “Single pan block” where the merchant can insert the PAN number (Card number, can be 16-19 digits long) to block, disabling transaction from it. Only numbers are accepted in the new field and there is a formal control over the field;
- c) **Masked Pan:** by selecting this rule type, it will open a new field called “Masked Pan” where the merchant can insert the masked PAN number to block, disabling transaction from it. Only numbers are accepted in the new field and there is a formal control over the field (i.e. the format should be 123456*****1234)
- d) **Card Type:** by selecting this rule type, it will open a new field called “Card Type” where the merchant can select the option from Credit, Debit or Prepaid, disabling transaction for the card type selected
- e) **IP Block:** by selecting this rule type, it will open a new field called “Ip block” where the merchant insert the IP number to block, disabling transaction from it when particular cardholder name is entered on payment page or send via API.
- f) **Block Card Holder:** by selecting this rule type, it will open a new field called “Block card holder” where the merchant insert the card holder name, disabling transaction from it.
- g) **Setting Autolockout Times:** by selecting this rule type, it will open a new field called “Setting Auto Lockout Times” where the merchant insert hours, minutes and seconds (hh:mm:ss). Auto lockout time is the amount of time that automatically blocked transactions are prohibited from trying transactions at the store again. When a transaction is declined for any reason with a specific PAN, then it won’t be possible to retry another time the same PAN until the “auto lockout time” is passed.

- h) **Setting Duplicate Lockout Times:** by selecting this rule type, it will open a new field called “Setting Duplicate Lockout Times” where the merchant insert hours, minutes and seconds (hh:mm:ss). Duplicate lockout time is the length of time that duplicate transactions are restricted from your store. That is, if two transactions are identical and they both occur within a length of time less than the specified duplicate lockout time, they will be automatically blocked as duplicate transactions. When a transaction is declined for any reason then it is not possible to retry another time the same transaction until the “duplicate lockout time” is passed. For the “same transaction” the intended same amount and PAN.

Date	Rule Name	Rule Type	
15/06/2023	nameCardRule1	Card Bin Block	 <div>MANAGE DELETE</div>
16/06/2023	nameCardRule2	IP Block	<div>Enabled</div> <div></div>

By clicking on “Manage”, it will open a new popup where it will be the Rule Name already filled in, the Rule Type already filled in and not editable, the Rule Type already filled in and the Status

Processing Rule

DISABLED ☐

Rule Name

nameCardRule1

Rule Type

Card Bin Block

Card Bin Block

123456

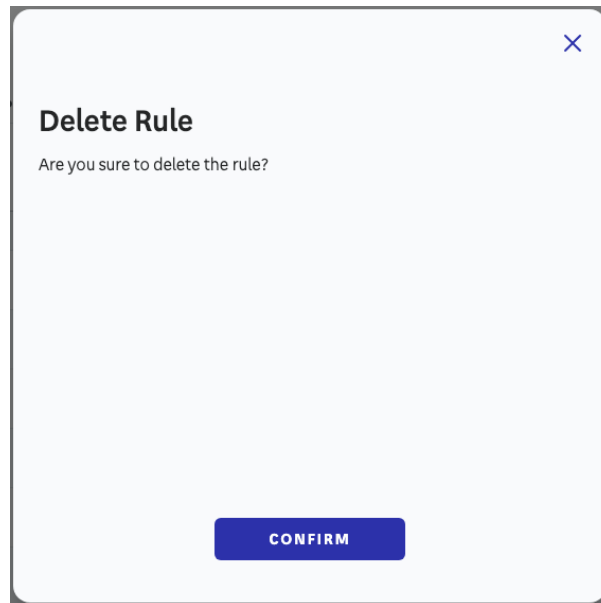
CONFIRM

Finally, the Merchant can also delete an existing rule by clicking “Delete” :

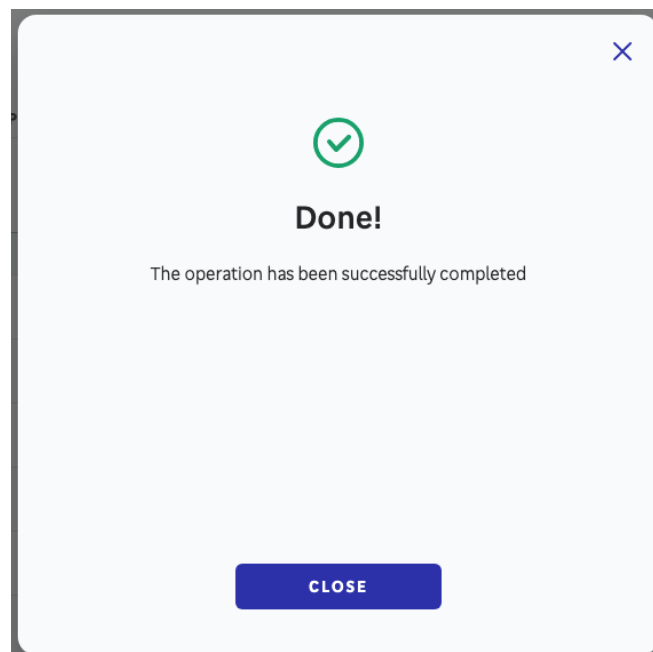
CONFIGURATIONS API KEYS PROCESSING RULES

CREATE NEW RULE →

Date	Rule Name	Rule Type	Status	
15/06/2023	nameCardRule1	Card Bin Block	Enabled	<div>MANAGE DELETE</div>
16/06/2023	nameCardRule2	IP Block	Enabled	...



Once confirmed, a confirmation popup is displayed.



Note: Only enabled user will have visibility on processing rules in the dedicated tenant.

5.6.2 Users

The Admin profile can see the list of users configured to access the Back Office.

Each user is displayed with:

- Email
- Name
- User role – Admin, Operator or Viewer
- Status – Activated or Deactivated

User management

[ADD USER →](#)

Email	Name	User role	Status	
kristijan.plese_t0000297@yopmail.com	Kristijan Plese T0000297	admin	• DEACTIVATED	MANAGE →
kalimero888@yopmail.com	Tomo	admin	• ACTIVATED	MANAGE →
vub-test-user@yopmail.com	Test	admin	• ACTIVATED	MANAGE →

If the Admin clicks on “Manage”, it can change the name and the role of the selected user and Confirm. The email field is not editable.

Manage User

User data

DISABLE ☐

Email

adrian.mcdonalid@example.com

Name

Adrian

User role ⓘ

Admin

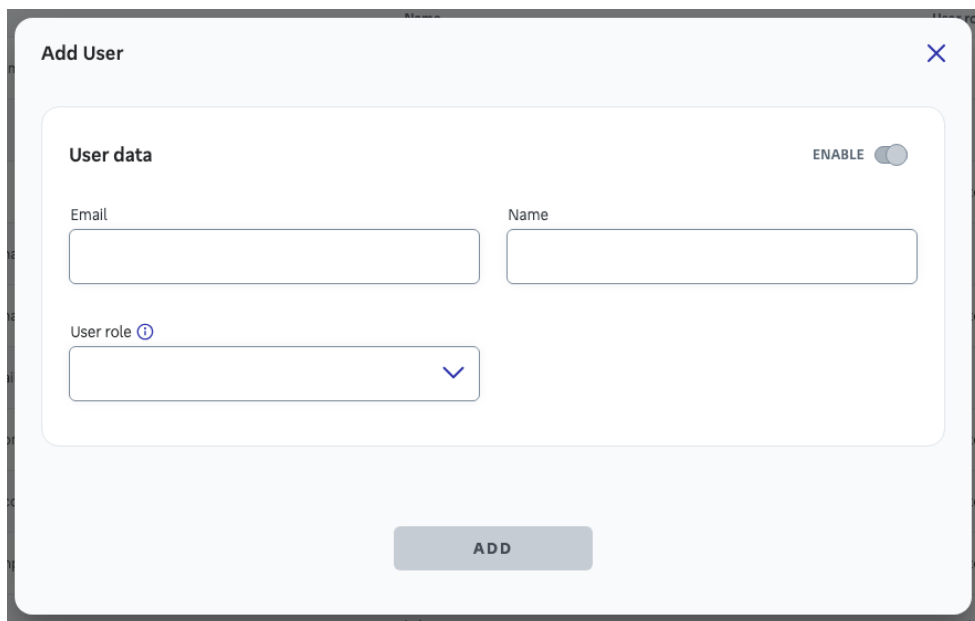
CONFIRM

The Admin can also “Add User” by clicking on the appropriate button and entering the following data: Name, User Role – Admin, Operator or Viewer, and Email.
It is not possible to create two users with the same e-mail.

User management

 [ADD USER →](#)

Email	Name	User role	Status	
kristijan.plese_t0000297@yopmail.com	Kristijan Plese T0000297	admin	• DEACTIVATED	MANAGE →
kalimero888@yopmail.com	Tomo	admin	• ACTIVATED	MANAGE →
vub-test-user@yopmail.com	Test	admin	• ACTIVATED	MANAGE →



Add User [X]

User data ENABLE ☐

Email

Name

User role ⓘ

ADD

5.7 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.

5.7.1 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.

5.7.1.1 Simple Request

There are two types of request, the simple and the advanced.

With the simple one, a single payment can be made by filling in the request fields with:

Field	Description
Amount	Transaction amount. It cannot be modified by the customer receiving the link.
Expiration 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)
Expiration time	Latest time 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)
Description	Order description. This text will appear on the customer's checkout page. Optional
Custom Field	This text will not be shown on the payment page to the customer, but it will be visible in the Order details of the Back Office Optional

Create a payment request

Configure a new Pay-by-link Plus payment request for customers

Pay-by-link Plus settings

Request type ⓘ

☒ Simple request
 ☐ Advanced request

Terminal ID*
T0000297

Order ID* ⓘ
PBL-05122025115506

Expiration date* ⓘ
20/12/2025

Expiration time* ⓘ
23 : 59

Description (optional) ⓘ

50 remaining characters

Custom field (optional) ⓘ

255 remaining characters

* Required field

Amount settings

Amount (euro)*

* Required field

CONFIRM

5.7.1.2 Advanced Request

With the advanced one, a single payment or multiple payments can be made by selecting “Advanced Request”, filling in the following required fields:

Field	Description
Amount	Transaction amount. It cannot be modified by the customer receiving the link.
Expiration 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)

Expiration time	Latest time 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)
Description	Order description. This text will appear on the customer's checkout page. Optional
Customer field	This will not be shown on the payment page to the customer, but will be visible in the order details on the backoffice. Optional
Amount Settings section	
Amount Type	It gives the chance to the user to pay with different amount type: <ul style="list-style-type: none"> • Single Amount • Amount chosen by the customer • Multiple Predefined Amounts
Max number of uses	It specifies the max number of times the link can be used. It can be left blank for unlimited usage.
Amount	Amount to be paid by the customer.

Create a payment request
Configure a new Pay-by-link Plus payment request for customers

Pay-by-link Plus settings

Request type ⓘ

☐ Simple request ☒ Advanced request

Terminal ID*
T0000297

Order ID* ⓘ
PBL-05122025120012

Expiration date* ⓘ
20/12/2025

Expiration time* ⓘ
23 : 59

Description (optional) ⓘ
50 remaining characters

Custom field (optional) ⓘ
255 remaining characters

* Required field


Amount settings

Amount Type*
Single amount

Max number of uses ⓘ
1

Amount (euro)*

* Required field

 **CONFIRM**

Once confirmed, the first page is the Informative Page settings. The Informative page is a single page that functions as a mini website. On this page, the merchant can insert an image, a title, and text in multiple languages, which will be shown to the customer before payment. This section is skipped when the amount is equal to 0.


Order PBL-05122025120012
Amount: €1.00


Informative page settings


The informative page is a single page that functions as a mini website. On this page, you can insert an image, a title, and text in multiple languages, which will be shown to the customer before payment.

Upload image


Max size 600*250 pixels, max 500KB, supported formats: .jpg, .png, .webp

Select language 



Title 

255 remaining characters

Description 

1000 remaining characters

ADD LANGUAGE

NEXT

The second step is the Payment Settings page that allows to enter the type of payment, the method to make the payment, and the type of capture.

Field	Description
Action	<p>It allows to enter the type of payment.</p> <ul style="list-style-type: none"> Payment (with Amount > 0) Pre-Authorization (with Amount > 0) Card Verification (with Amount = 0) <p>They are also shown based on the terminal settings.</p>
Method	<p>It allows to enter the method to make the payment. It can be an APM, such as Google Pay or Apple Pay. Or even a type of card, such as VISA or Mastercard.</p> <p>They are also shown based on the terminal settings.</p> <p>Is disabled until an action is entered</p>
Capture	<p>It allows to enter the capture type:</p> <ul style="list-style-type: none"> Implicit Explicit


They are also shown based on the terminal settings.

Is disabled until an method is entered.

When the action is a “Card Verification”, the capture Is disabled

Pay-by-Link Advanced Request - Step 2/4

Order PBL-18122025023325
Amount: €1.00



Payment Settings

Action ⓘ

Payment

Method ⓘ

Select Method

Capture ⓘ

Select Capture

NEXT

Clicking on “Type”, a list of options is displayed:

[← BACK](#)

Pay-by-Link Advanced Request - Step 2/4

[CLOSE X](#)**Order PBL-29052025044735-OE000003**

Amount: €5.00

Payment type

Type

Single payment

**NEXT**

Field	Description
Single Payment	<p>It allows to continue without filling in any specific fields and directly land in the next section.</p> <p>Is visible when the amount > 0</p>
Payment with recurring data	<p>It allows to access the “Contract Settings” section that allows to create a new contract or link an existing one</p>
Payment by subscription/installments	<p>It allows to access the “Subscription and Installment Settings” section that allows to create an installment payment plan</p> <p>Is visible when the amount > 0</p>

Order PBL-29052025051156-OE000003

Amount: €0.00



Payment type

Type

Payment with recurring data



Payment with recurring data

Clicking “Payment with recurring data”, view a “Contract Settings” section. It is required.

Order PBL-29052025051156-OE000003

Amount: €0.00

Payment type

Type

Payment with recurring data



Contract Settings

Recurring Action ⓘ

Select Recurring Action



Contract ID ⓘ

Contract type ⓘ

Select Contract Type



Contract expiration date

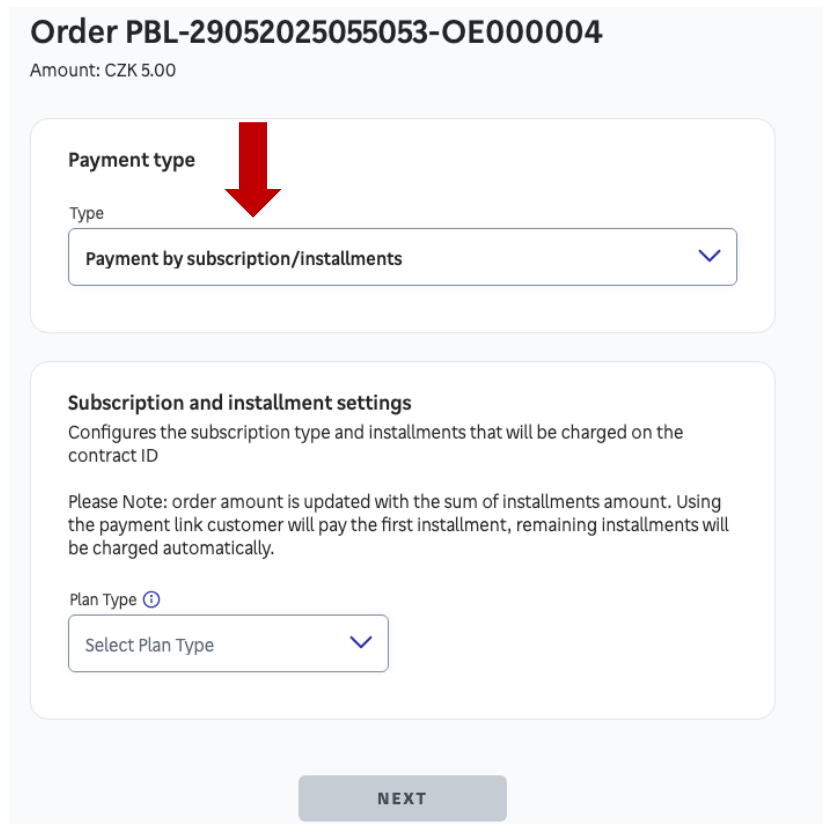
DD/MM/YYYY



NEXT

Field	Description
Recurring Action	<ul style="list-style-type: none"> Contract Creation – creates a new contract ID by saving the data of the card or payment instrument used Card Substitution - replaces the card or payment instrument data associated with an existing Contract ID Subsequent Payment – Sets an existing Contract ID as the card or payment instrument for the transactions
Contract ID	<p>It allows to insert a Contract ID.</p> <p>It is randomly generated if the Recurring Action is “Contract Creation” otherwise the field must be filled by merchant</p>
Contract Type	<ul style="list-style-type: none"> Scheduled (is prefilled and not modifiable when the Recurring Action is “Card Substitution”) Unscheduled (is prefilled when the Recurring Action is “Contract Creation”) One Click (is prefilled and not modifiable when the Recurring Action is “Card Substitution”)
Contract Expiration Date	<p>It allows to enter the expiration day of the created contract.</p> <ul style="list-style-type: none"> Is optional when the Recurring Action is “Contract Creation” and the Contract Type is “Unscheduled” or “One Click” Is required when the Recurring Action is “Contract Creation” and the Contract Type is “Scheduled” Is optional when the Recurring Action is “Card Substitution” Is not visible when the Recurring Action is “Subsequent Payment”
Contract Frequency	<p>Is composed of the label “Every”.</p> <ul style="list-style-type: none"> Days – From 1 to 365 Weeks – From 1 to 52 Months – From 1 to 12 <p>If the user inserts values not valid, an error message shall appear: “Billing period must be between 1 day and 1 year”</p>

Clicking “Payment by subscription/installments”, view a “Subscription and installment settings” section. It is required.



Order PBL-29052025055053-OE000004
Amount: CZK 5.00

Payment type

Type

Payment by subscription/installments

Subscription and installment settings
Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ

Select Plan Type

NEXT

The Plan Type are: (After entering the Plan, under this section, the “Contract Settings” section is also shown (it is required))

- Fixed (Only for CEE)
- Variable (Only for CEE)
- Acquirer Agreement (Only for Greece)

Subscription and installment settings

Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ

Fixed

▼

Number of installments ⓘ

Frequency ⓘ

Select Frequency

▼

Amount

Total: €0.00

Field	Description
Number of installments	It represents the total number of transactions, including the first transaction, from 1 to 999.
Frequency	<div>It represents the frequency with which the payment occurs.</div> <div><div><div>▪</div>Daily</div><div><div>▪</div>Weekly</div><div><div>▪</div>Monthly</div><div><div>▪</div>Yearly</div></div>

Subscription and installment settings


Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ
Variable ▼

Down payment ⓘ

Installment 1

Date
DD/MM/YYYY 

Amount

ADD RATE

Total: €0.00

Field	Description
Down payment	It represent the amount that the merchant pays for the first transaction. If the field is not filled in, a card verification shall be performed.
Date	It indicated the date on which the payment is to be made,
Amount	It indicated the amount on which the payment is to be made,
Add Rate	It allows to add one or more installments

Clicking “Add Rate”

Subscription and installment settings

Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ


Down payment ⓘ

Variable ✓

Installment 1

Date


Amount


DD/MM/YYYY 

Installment 2

Date

Amount

DD/MM/YYYY 

DELETE 

ADD RATE

Total: €0.00

By setting 'Acquirer Agreement' as a Plan Type, the merchant have displayed the following step:

Pay-by-Link Advanced Request - Step 1/5

Order PBL-20112025041701

Amount: €0.10

Payment type

Type

Payment by subscription/installments

Subscription and installment settings

Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ

Acquirer Agreement

Number of Tranches ⓘ



This field is required

NEXT

Field	Description
Acquirer Agreement	This Plan Type let the merchant set a recurring payment with a fixed number of tranches for the cardholder.
Number of Tranches	It represents the total number of installments for the related payment.

If the amount entered in the “Subscription and installment settings” section exceeds the amount entered on the first page of the pay-by-link plus, becomes red

Order PBL-29052025064830-OE000003
Amount: €4.00

Payment type
Type
Payment by subscription/installments

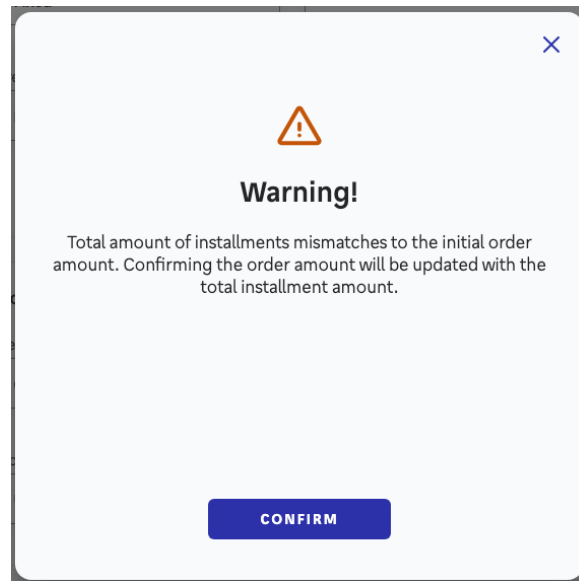
Subscription and installment settings
Configures the subscription type and installments that will be charged on the contract ID

Please Note: order amount is updated with the sum of installments amount. Using the payment link customer will pay the first installment, remaining installments will be charged automatically.

Plan Type ⓘ	Number of Installments ⓘ
Fixed	2
Frequency ⓘ	Amount
Daily	3,00

Total: €6.00 ⚠

Clicking “Next”, view a popup informing that the amount entered on the first page of the pay-by-link plus will be overwritten by the amount entered in the “Subscription and installment settings” section



After this step, view the third step. It is composed of “Customer Information” section.

Order PBL-29052025070339-OE000003
Amount: €5.00

Customer information
Client ID ⓘ

Client name

Client e-mail

Country code
Select Country Code ▼
Mobile


Country code
Select Country Code ▼
Home phone

Country code
Select Country Code ▼
Office phone

Billing address (optional) ▼

Customer information, with the following fields:

- Client ID - This code can help to identify the customer in other sections of the Back Office, uniquely
- Client name
- Client e-mail
- Country code
- Mobile
- Country code
- Home phone
- Country code
- Office phone

Billing address (optional) 

Name

Street

City

Postcode

Province


Country

Additional information

50 remaining characters

Shipping address (optional)

☒ Shipping Address same as billing address



Open an accordion Billing Address (optional), with the following fields:

- Name
- Street
- City
- Postcode
- Province
- Country
- Additional Information

The section Shipping Address is not visible. Clicking “Shipping Address same as billing address”, the shipping address section will be shown, otherwise the same values will be entered for the shipping address section as in the billing address.

Shipping address (optional)

☐ Shipping Address same as billing address

Name

Street

City

Postcode

Province

Country

Additional information

50 remaining characters

NEXT

Shipping address (optional), with the following fields:

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

Clicking “Next”, view the last step. Is composed of all the information entered during creation.

SUMMARY

Order summary and Pay-by-link expiry

Terminal ID	Order ID
OE000003	PBL-29052025070339-OE000003
Amount	Expiration date
2,00 EUR	13/06/2025
Description	Language
BackOffice	ENG
Additional description	
BackOffice	

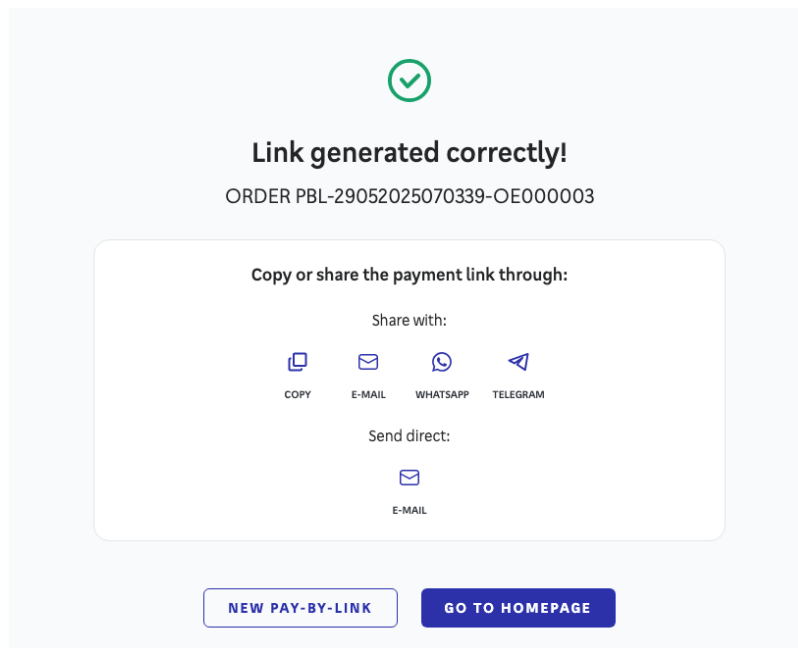
Payment Settings

Recurring Payments

Customer information

CONFIRM

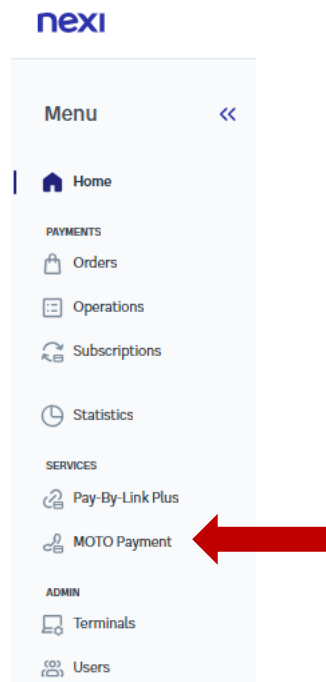
By clicking on “Confirm”, the link is generated and ready to be copied or to be sent by e-mail or other sharing channels to the customer. The choices available are: Copy, e-mail, Whatsapp, Telegram.



5.7.2 MOTO Payment

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 “MOTO Payment” menu, the following page appears, where the merchant must enter:

- Amount (euro) (required)
- Credit card information:
 - PAN (required)
 - Expiring Date (required)
 - CVV (required or optional depending on the terminal setup)

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

MOTO

CLOSE X

Create a MOTO payment

Enter payment information

Terminal ID*

Select Terminal ID



Order ID* ⓘ

Amount*

*Field is Required

Enter card information

PAN*

e.g. 1234 5678 9101 2131

Expiring date*

mm/yy

CVV

e.g. 123

*Field is Required

Cardholder information (optional)



Cardholder information (optional)



Other Info (optional)



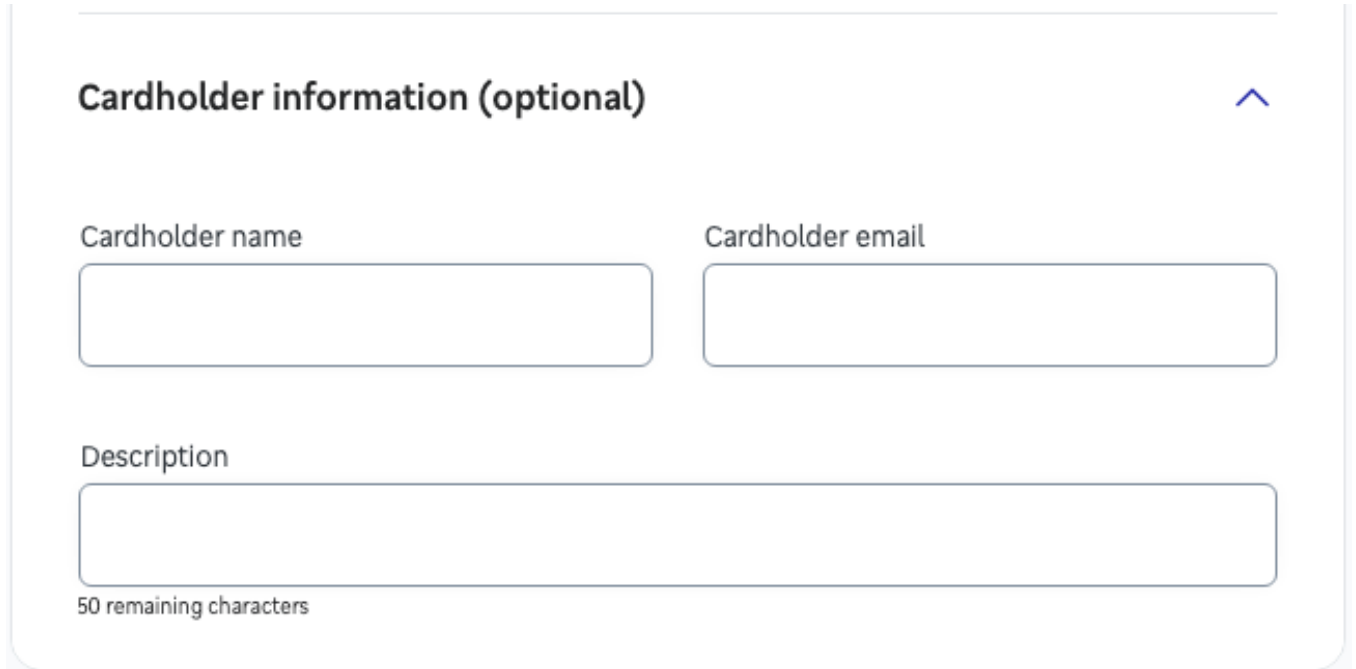
Billing address (optional)



CONFIRM

Cardholder information (optional). Opening the accordion, the following fields will be shown:

- Cardholder name
- Cardholder email
- Description



The screenshot shows an accordion titled "Cardholder information (optional)" with a blue upward arrow icon on the right. Inside the accordion, there are three input fields: "Cardholder name" and "Cardholder email" are side-by-side at the top, and "Description" is a larger field below them. At the bottom left of the "Description" field, it says "50 remaining characters".

Other info (optional). Opening this section, the following fields will be shown:

- Action (Payment / Pre-authorization)
- Capture Type (Explicit / Implicit)
- Client ID
- Custom field
- Country code
- Number
- Country code
- Number
- Country code
- Number

Other Info (optional) ^

Action

Payment ▾

Capture Type

Automatic ▾

Client ID ⓘ

Custom Field ⓘ

255 remaining characters

Country code

Select ▾

Enter number

Country code

Select ▾

Enter number


Country code

Select ▾

Enter number

Billing address (optional). Opening the accordion, the following fields will be shown:

- Name
- Street
- City
- Postocde
- Province
- Country
- Additional Information


Billing address (optional) 

Name

Street

City

Postcode

Province 

Country

Additional information

50 remaining characters

Shipping address (optional)

☒ Shipping Address same as billing address

The section Shipping Address is not visible. Clicking “Shipping Address same as billing address”, the shipping address section will be shown, otherwise the same values will be entered for the shipping address section as in the billing address.

Shipping address (optional)


☐ Shipping Address same as billing address

Name

Street

City

Postcode

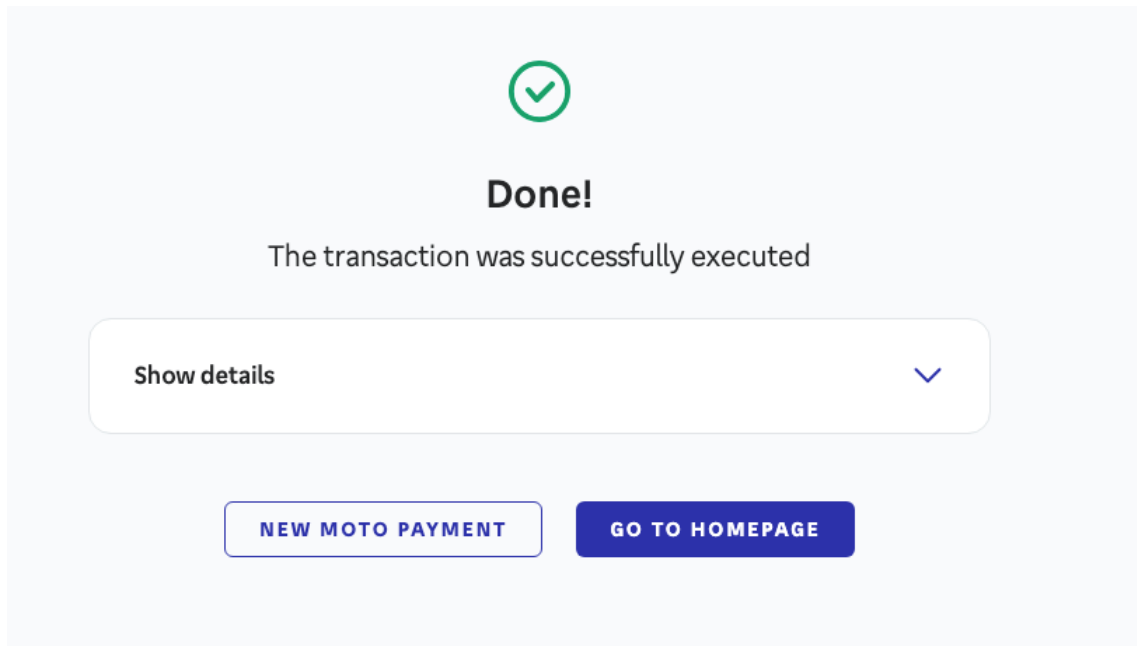
Province 

Country

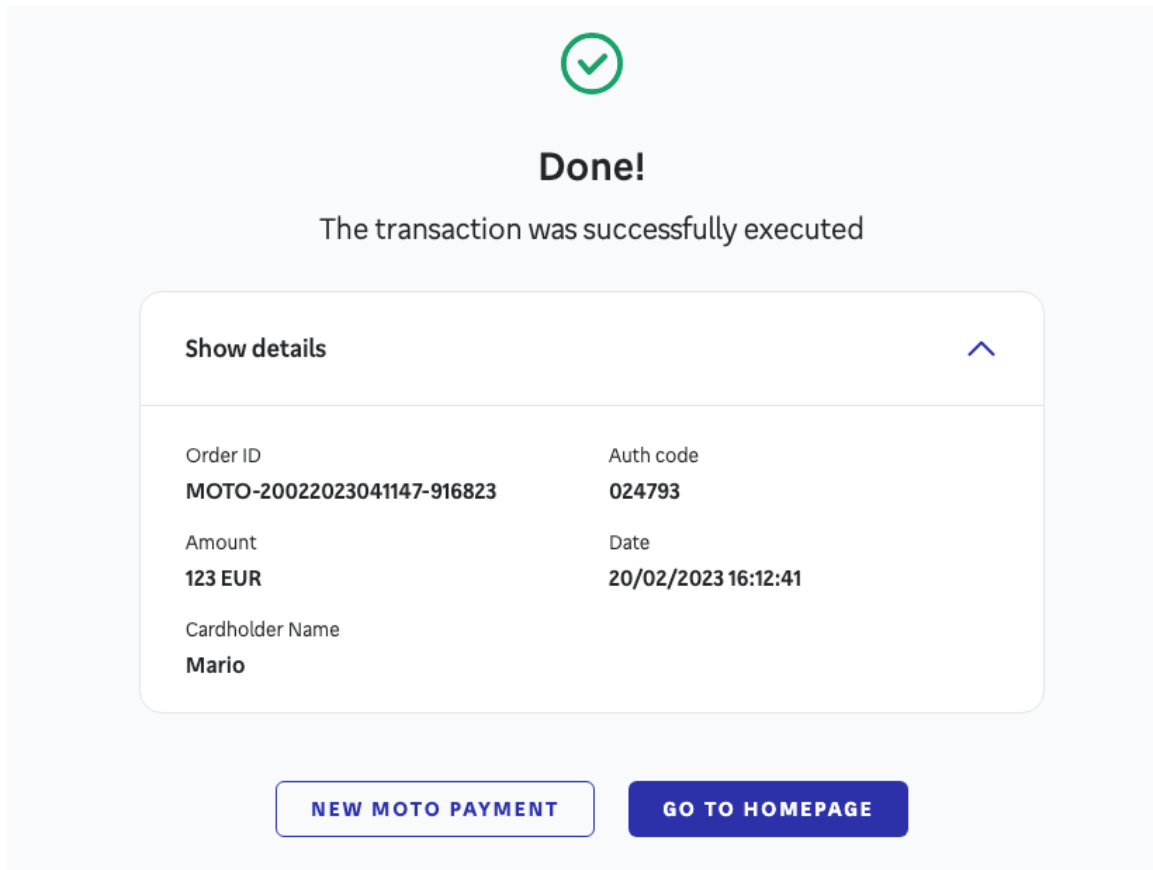
Additional information

50 remaining characters

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

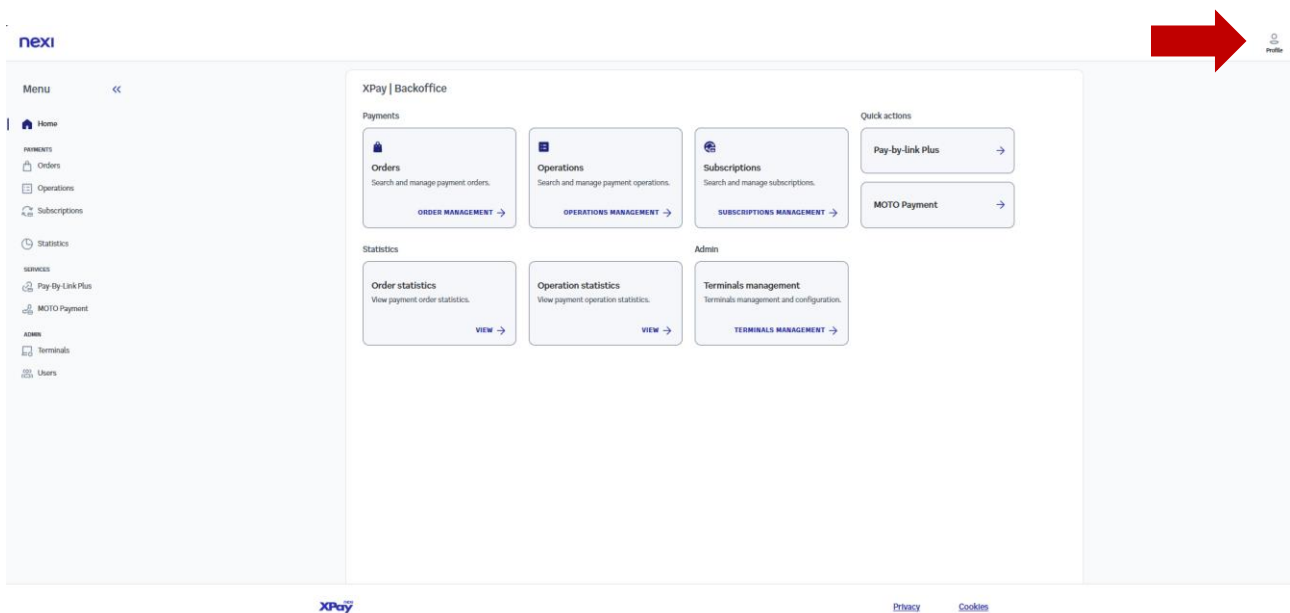


Opening the accordion, the following fields will be shown:



5.8 Profile

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



A page with name, e-mail, user role, masked password is shown and from this section you can change your password, change the backoffice language and logout

The screenshot displays two side-by-side panels. The left panel, titled 'User profile', has a dark blue header with the name 'Minerva Douglas'. Below the header, it shows the email 'zefallissicru-4885@yopmail.com', the user role 'Admin', and a masked password '*****'. A 'CHANGE PASSWORD →' link is positioned to the right of the password field. At the bottom of the panel, there is a link 'Exit XPay Backoffice? Exit'. The right panel, titled 'Language', features a 'Select language' dropdown menu with 'Auto-detect' selected and a downward arrow icon.

To perform the password change, it's necessary to follow the process described:

1. Click to "CHANGE PASSWORD"
2. Insert a Current Password
3. Insert a New Password
4. Insert a Retype New Password

Change password

CLOSE X

Change password

Password must be 8–20 characters



- at least one uppercase character
- at least one lowercase character
- at least one number
- at least one special character



CONFIRM

Once confirmed, a confirmation page is displayed.



Done!

Password changed successfully

[GO TO PROFILE](#)