



DASHBOARD - USER GUIDE

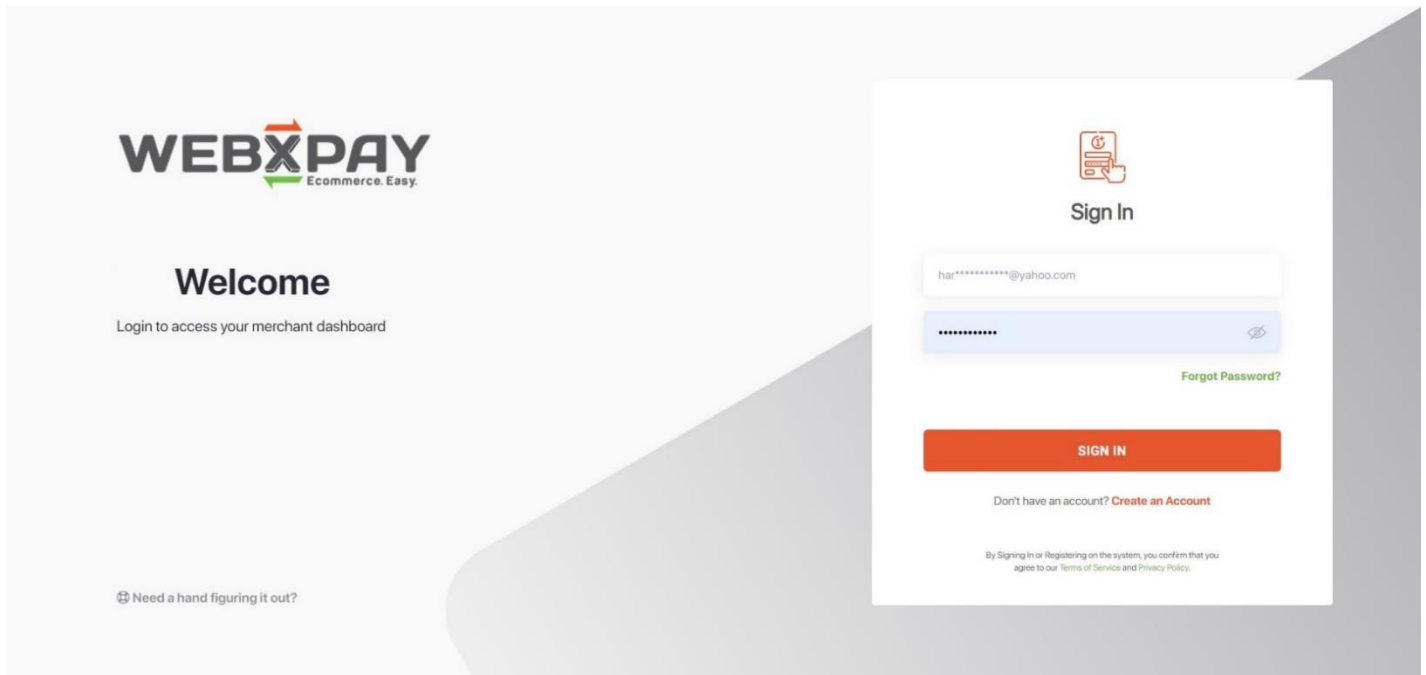
V.1.3

CONTENT

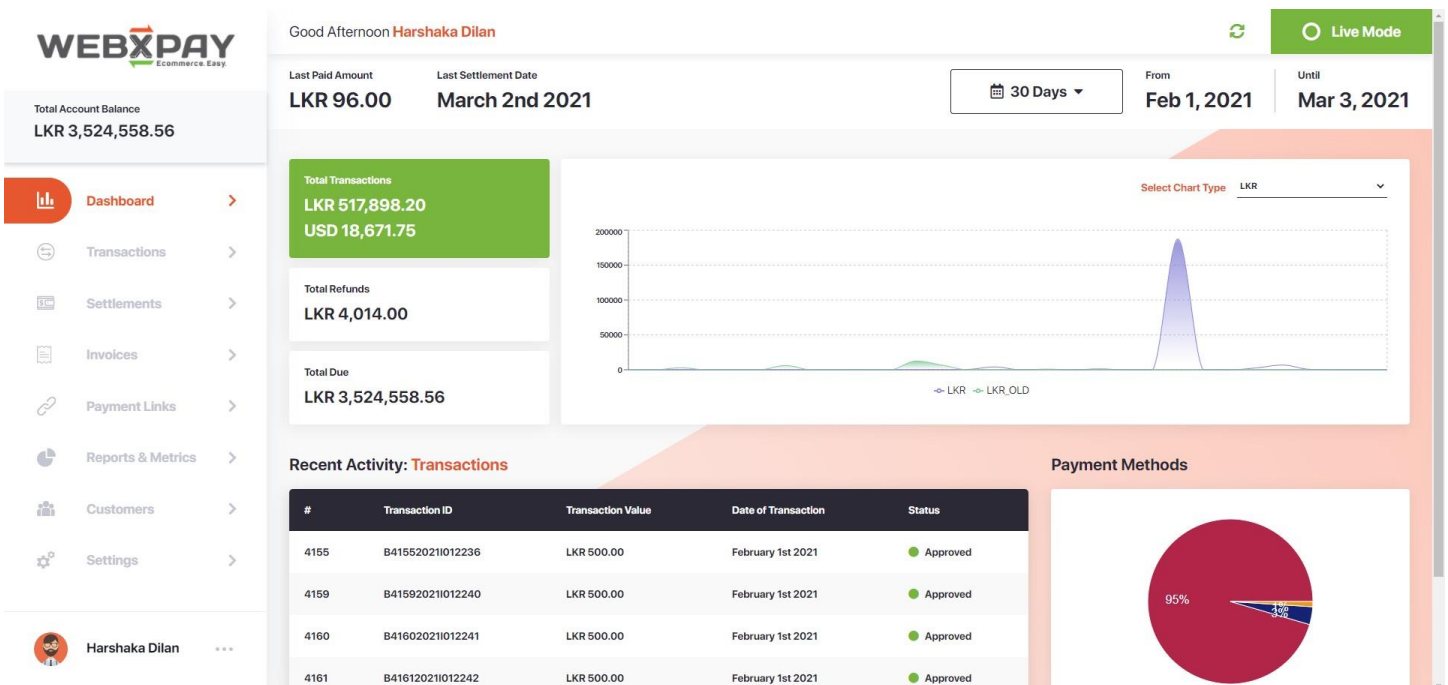
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- User Sign In

Merchant can login to WEBXPAY DASHBOARD through <https://webxapi.online/> with the Username and Password, provided at the initial stage.

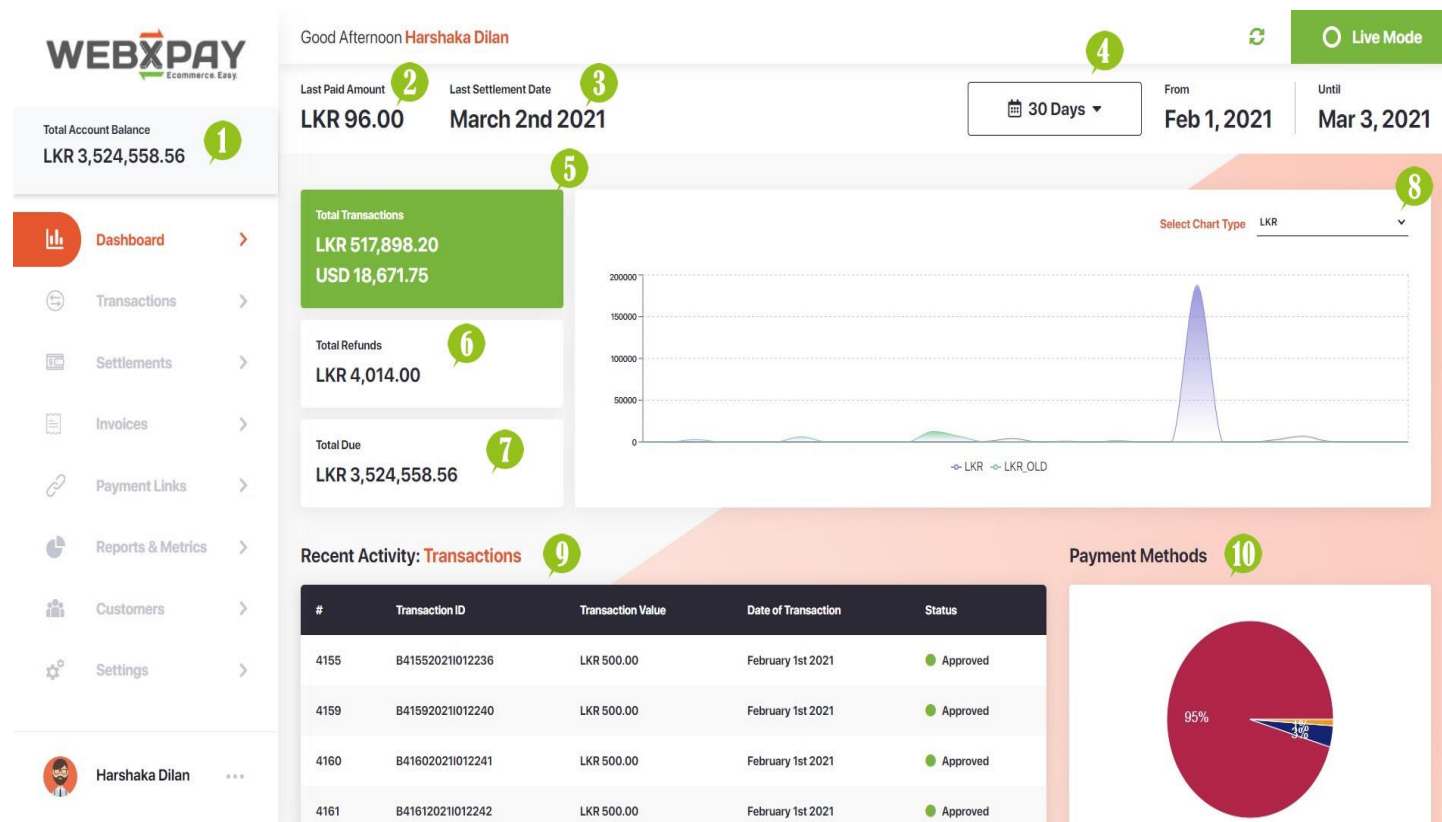


Once you have signed in you will be redirect to the WEBXPAY Dashboard as shown in the illustration below.



• Merchant Dashboard

The merchant dashboard will provide an information such as total transaction, last settled amount, last settled date and total, transaction, data comparison chart and payment methods for the last 30 days as default. If required, you will be able to filter by dates using the date range option.



The Items marked in numbers are explained in detail and as follows.

1. Total Account Balance: The total due balance as of today will be shown on this
2. Last Paid Amount: The last settled amount by WEBXPAY
3. Last Settlement Date: The last settlement date in which the funds were deposited to your bank account
4. Date Range: You can select the date range you wish to view by filtering the data. You can choose the Date/Months as per your wish.

When the data is set such as Total Transaction (Illustrated as 5) and Total Refunds (6) will get filtered based on the date selected.

By default, the data shown will be for the last 30 Days.

8. Data Comparison Graph: Based on the filtered dates, the merchant will be able to view the flow of the transaction and as the comparison in transactions.
9. Recent Activity: The Most Recent 5 transactions will be listed on this data grid.
10. Payment Methods: This payment type that were used by the customers will be denoted via the PIE Chart

• Transactions

Transaction view will provide information pertaining to transactions that was performed along with refund related information.

Good Morning Harshaka Dilan

Live Mode

Total Account Balance
LKR 3,980,852.68

Total Transactions
LKR 714,835.20 | USD 19,410.90

Total Refunds
LKR 19,114.00

Transaction ID: Enter ID
Status: Select Status
Transaction Amount: Enter Value
Transaction Currency: Select Currency
SEARCH
CLEAR

Filters & Reports
31 Days
User Icon

#	Transaction ID	Store Reference	Transaction Amount	Date of Transaction	Payment Status
4371	B437120211152426		LKR 12.30	Mar 15, 2021	Approved
4370	D437020211152425		LKR 1.00	Mar 15, 2021	Approved
4369	D436920211152424		LKR 200.00	Mar 15, 2021	Approved
4364	T436420211152423	41	LKR 180,000.00	Mar 15, 2021	Approved
4362	T436220211152422	40	LKR 15,000.00	Mar 15, 2021	Approved
4358	T435820211152420	39	USD 566.00	Mar 15, 2021	Approved
4349	T434920211112417	75.80078959848534	LKR 2.00	Mar 11, 2021	Declined

Each module is explained further as follows.

1. Total Transactions: Shows the total processed Transactions Values according to your Selection of the date range as illustrated on No.4. In an event if both USD and LKR currencies are enabled these values will be separated by a Pipeline indicator.
2. Total Refunds: Shows the total Refund Values according to your selection of the date range.
3. Filters: You can filter your transactions by using Transaction ID, Transaction Value, and store reference and the Statuses (Approved, Decline) along with the currency selection drop down.

4. Filters & Reports: Date range based search option.
5. Download: You can download a CSV report of your Transactions.
6. Results: Shows the Transaction Results according to your Filters / Date Range.
5. View Transaction: In order to view more information pertaining to an individual transaction, You do have an option to view more information by clicking the Eye icon. When clicked users will be taken to a detailed view as illustrated below;

WEBXPAY
Ecommerce Easy

Total Account Balance
LKR 3,717,542.80

Transaction ID: Enter ID
Status: Select Status
Transaction Value: Enter Value
SEARCH CLEAR

Filters & Reports
31 Days

Transaction Details

Transaction Value: **LKR 306,003.00**
Date of Transaction: **Mar 2, 2021**
Transaction ID: **T43012021022370**
Clearance Status: **Settlement Pending**
Point of Transaction: **X GATEWAY**

REFUND AMOUNT
Need a hand figuring it out?

Transaction Timeline

Payment Initiated (Mar 2, 2021)
Payment Successful (Mar 2, 2021)
Settlement Pending (Your Funds will be credited to your account on Mar 8, 2021)

Payee Details

Payee Name: **Yuga Nava**
Payee Telephone: **777478913**
Payee Address: **No 7, Bathiyapura, Kotagala**

Payment Breakdown

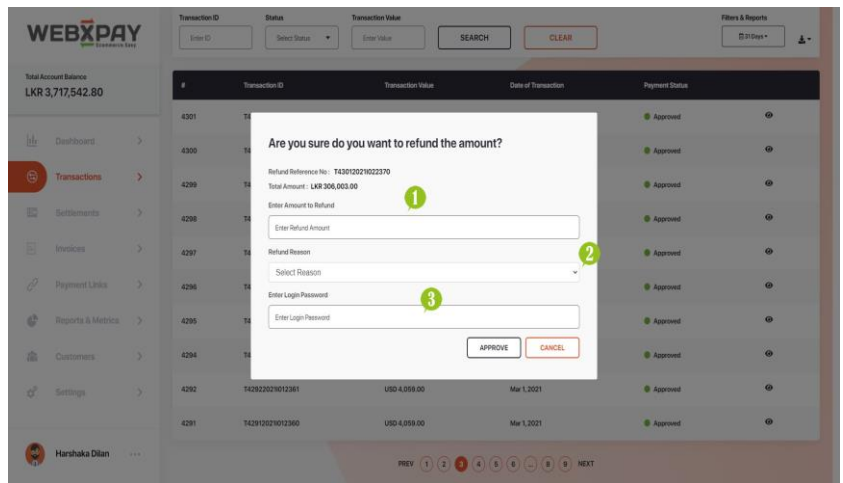
Total Amount: **LKR 306,003.00**
Webxpay Fees: **- LKR 12,240.12 (4.00 %)**
Settlement Amount: **LKR 293,762.88**

PREV 1 2 3 4 5 6 ... 8 9 NEXT

Detailed View of the Transaction

1. Transaction Value : Total Transaction Amount
2. Date of Transaction : Transacted Date
3. Transaction ID : The Unique ID generated by WEBXPAY for Transaction Tracking
4. Clearance Status : Indicated the status of the payment
5. Point of Transaction: Indicates from which source the transaction was made. Ex: X-Gateway, X- Sell or X - Direct
6. Refund Amount: Request Refund or Refund Status view

1. Enter amount wish to refund
2. Set the reason for the refund Request
3. Place your Dashboard login Password for the confirmation Of the refund request.



7. Shows the Payment Initiated Date.
8. Shows the Payment Successful Date.
9. Shows the Settlement status and forecast of the settlement deposit date to the account Number that was shared during the on boarding process.
10. Payee Details: Customer details are shows here.
11. Payment Breakdown: Shows the Transaction Amount, Transaction Fees and settlement values.

Total Refunds:

Refunds view will enable users to view the status of their Refund requests.

Good Morning Harshaka Dilan

This Account is now Live. Please replace Sandbox API with Live API to start live payment transactions.

Total Transactions: LKR 517,515.00 | USD 18,844.90

Total Refunds: LKR 4,014.00

Transaction ID: Enter ID, Refund Value: Enter Value, Status: Select Status

SEARCH, CLEAR

Filters & Reports: 31 Days

#	Transaction ID	Transaction Value	Refund Value	Date of Transaction	Status
4246	T424620211222315	LKR 2,082.50	LKR 2,000.00	Feb 22, 2021	Rejected
4247	T424720211222316	LKR 2,082.50	LKR 222.00	Feb 22, 2021	Rejected
4251	T425120211222320	LKR 170,000.00	LKR 100.00	Feb 22, 2021	Rejected
4244	T424420211222313	LKR 2,082.50	LKR 2,000.00	Feb 22, 2021	Pending
4241	T424120211222310	LKR 850.00	LKR 850.00	Feb 22, 2021	Pending
4219	B421920211182295	USD 12.30	USD 12.30	Feb 18, 2021	Rejected
4217	T421720211172293	LKR 817.50	LKR 800.00	Feb 17, 2021	Refunded

1. Filters: You can filter here by Transaction ID, Refund Value and by the status of the refund.
2. Date Filter for date wise sorting
3. Report – For CSV download of the Total refunds
4. All Total refunds shows in here according to the Date range you have picked.
5. Status – Shows the status of your Refund request.

There are 3 Statuses and those are,

Refunded: Your refund request was approved and done.

Rejected: Your refund request was rejected from the WEBXPAY end.

Pending: Still your refund request was not got the permission from WEBXPAY.

• Settlements

Settlement related information from the status of the settlement batch to what transactions that was settled along with the total due to be paid for merchants can be viewed on this section of the page.

The screenshot shows the WEBXPAY interface with the following elements:

- 1:** Total Settlements: LKR 18,309.00
- 2:** Total Due: LKR 730,666.25
- 3:** Search filters: Settlement ID, Settlement Value, Bank Account.
- 4:** Filters & Reports: 31 Days, Download icon.
- 5:** User profile: Harshaka Dilan.
- 6:** Settlement table header.
- 7:** Settlement table body.

#	Settlement ID	Total Settlement	Deductions	Amount Settled	Settlement Date	Account Deposited
1	64-202102181316-1	LKR 850.00	LKR 34.00	LKR 816.00	Feb 18, 2021	Com Bank
2	64-202102221232-1	LKR 4,700.00	LKR 188.00	LKR 4,512.00	Feb 22, 2021	Com Bank
3	64-202102241237-1	LKR 20.00	LKR 0.60	LKR 19.40	Feb 24, 2021	Com Bank
4	64-202102241239-2	LKR 50.50	LKR 1.52	LKR 48.98	Feb 24, 2021	Com Bank
5	64-202102241326-3	LKR 12,240.00	LKR 489.60	LKR 11,750.40	Feb 24, 2021	Com Bank
6	64-202102241348-4	LKR 0.00	LKR 0.00	LKR 3,406.81	Feb 24, 2021	Com Bank
7	64-202103042040-2	LKR 378.00	LKR 15.12	LKR 362.88	Mar 4, 2021	Com Bank
8	64-202103051155-1	LKR 70.50	LKR 2.12	LKR 68.38	Mar 5, 2021	Com Bank

1. Total Settlements: Shows the total settlement to your Account according to the date range You have selected as per the Date range set value (on No: 4).
2. Total Due: In here you can check the Total amount which WEBXPAY is required to settle.
3. Filters: You can set and filter settlements as follows.
Settlement ID, Settlement Values and Bank Account for which your payments are deposited
4. Filter & Reports: You can set the date range which you wish to see the settlement data.
5. Download: In Here you can click and download a CSV report of your Settlements
6. Settlements: Shows the data of your settlements
7. Show Details: You can click and check each and individual data of settlements. Once you Click the view icon the following Settlement view page will appear.

WEBXPAY Good Morning Harshaka Dilan

Total Account Balance
LKR 3,717,542.80

Dashboard > Transactions > **Settlements** > Invoices > Payment Links > Reports & Metrics > Customers > Settings >

Harshaka Dilan

Settlement Details

Settlement Value **LKR 816.00**

Total Sales Amount **LKR 850.00**

Total Refunds **LKR 0.00**

WEBXPAY Fees **- LKR 34.00**

Date of Settlement **Feb 18, 2021**

Settlement ID **64-202102181316-1**

Clearance Status **Settlement In progress**

Need Help with the System?

Settlement Timeline

Settlement Initiated Feb 18, 2021

Settlement In Progress Feb 22, 2021

Account Details

Settlement Account **Com Bank**

Account Number **8500025475**

Settlement Summary

Total Transactions **01**

Total Refunds **00**

Transactions List

ID	Settlement ID	Date	Name
1	T421620211152292	Mar 8, 2021	Sayatheesan Suresh

Settlement Details

1. Settlement Value: Settlement amount which will be deposited to your Account.
2. Total Sales Amount: Amount of the transaction which was done by your customer
3. Total Refunds: Shows the refund amount if exists
4. WEBXPAY Charges: Shows the Transaction fee of that particular transaction
5. Date of Settlement: Settlement date to your account
6. Settlement ID: Auto generated Settlement ID will be shown here for the tracking purpose

7. Clearance Status: Shows the status of the settlement. Ex: settlement in progress, Settled
8. Settlement Initiated: Shows the settlement Initiated Date
9. Settlement Status: Shows the settlement in progress/Settled date
10. Account Details: Shows the account Details which the settlements are deposited.
11. Settlement Summary: Shows a summary of your settlement with the no of Transactions And no of refunds
12. Transaction List: Shows each transactions and refunds which includes on the settlement. You can download a report which contains transaction data and the settlements.

Total Due

The screenshot displays the Webxpay interface for a user named Harshaka Dilan. The left sidebar contains navigation links: Dashboard, Transactions, Settlements (highlighted), Invoices, Payment Links, Reports & Metrics, Customers, and Settings. The main content area shows the 'Settlements' page with a green header indicating 'Live Mode' and a message to replace the Sandbox API with the Live API. Below this, two summary cards are shown: 'Total Settlements LKR 18,309.00' and 'Total Due LKR 730,666.25'. A red arrow points to the 'Total Due' card. Below the summary cards is a table of transactions. A green circle with the number '1' points to the table header, and another green circle with the number '2' points to a download icon in the top right corner of the table area.

Transaction Date	Customer Name	Order Reference No	Payment Currency	Refund Charge	Payment Amount	Type	Merchant Payment Status
Oct 25, 2020	Harshaka Dilan	T38922020I251990	LKR	LKR0.00	LKR48.48	order	Pending
Nov 4, 2020	Test Webxpay	T38982020I041991	LKR	LKR0.00	LKR19.20	order	Pending
Nov 4, 2020	Test Webxpay	T39012020I041994	LKR	LKR0.00	LKR19.20	order	Pending
Nov 4, 2020	Test Webxpay	T39032020I041996	LKR	LKR0.00	LKR19.20	order	Pending
Nov 4, 2020	Test Webxpay	T39082020I042001	LKR	LKR0.00	LKR19.20	order	Pending
Nov 5, 2020	Test testloccgo	T39192020I052012	LKR	LKR0.00	LKR10.56	order	Pending
Nov 5, 2020	Test testloccgo	T39202020I052013	LKR	LKR0.00	LKR10.56	order	Pending
Nov 5, 2020	Test testloccgo	T39212020I052014	LKR	LKR0.00	LKR10.56	order	Pending

1. Shows the due that's for settlement here
2. You can download a CSV report of Due payments

- Invoices (X Direct)

As merchants, you will have the option of creating invoices and share among your customers for online payment collection.

1. All the Invoice Values shown here are according to the date range you have picked using The date range (On No.5)
2. Products and Services: You can Create and store Products for later use.

1. Filters
2. Download Product list
3. Created Products on your Account
4. Add New Product to your Inventory

3. Templates: Template creation for future references

1. Filters

2. Templates Already Created on your account

3. Edit Template

4. Create Template

#	Template Name	Inclusive Items	Amount
1	My Template 01	laptop X 3 (LKR 195,000.00) Pen Drive X 2 (LKR 5,000.00)	200,000.00
2	My Template 02	iphone X 3 (LKR 360,000.00)	360,000.00
3	My Template 03	laptop X 30 (LKR 1,950,000.00)	1,950,000.00
4	My Template 04	Pen Drive X 33 (LKR 59,400.00)	59,400.00
5	My Template 05	Pen Drive X 5 (LKR 12,500.00) laptop X 8 (LKR 520,000.00)	532,500.00

Create Template

1. Template Name

2. Add Template Items – Here You have to add products To your template

3. Edit Product

Template Detail

Template Name
My Template 06

Total Invoice Value
1,625,000.00

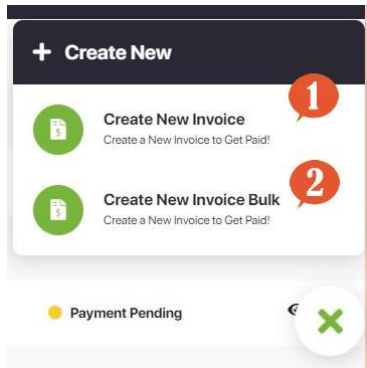
SAVE TEMPLATE

Need Help with the System?

Add Template Items

#	TITLE & DESCRIPTION	RATE/ITEM	QTY	TOTAL
1	laptop	LKR 65000	25	1,625,000.00
			Total	1,625,000.00

4. Filters: You can set and search by filter
5. Filters & Reports: You can set the date range of your filters
6. Download: You can download a CSV report of your invoices
7. Filtered Data: You can see the Invoices with the statuses, Amount, and some useful data.
8. View Invoice: By clicking you can view the detailed invoice.



1. Create a New Invoice and send to a single Customer.
2. Create a New Invoice and send Bulk invoice to multiple Customers.

Create New Invoice

Customer Details

Currency Type: LKR

Client Details

Select Customer

+ Add New Customer Details

Invoice Number

Enter or Generate Invoice #

Date of Issuance: Select Date

Date of Expiry: Select Date

Total Invoice Value: LKR 243,500.00

GENERATE INVOICE

SAVE INVOICE

Need Help with the System?

Add Invoice Line Items

#	TITLE & DESCRIPTION	RATE/ITEM	QTY	TOTAL
1	iphone	LKR 120,000.00	2	LKR 240,000.00
2	iphone charger	LKR 3,500.00	1	LKR 3,500.00
				Add Additional Charges
				Total Payable: LKR 243,500.00

Customer Notes

Add Customer Notes

Terms & Conditions

Add or Select Terms & Conditions

1. Currency Type: You can set the Invoice currency using this Drop down (Please Note the currencies assigned might differ based on the set base currencies)
2. Select Customer: You can select a customer which you have created earlier
3. Add new customer: You can create a new customer.

Fill and save the customer information to whom you wish to send the invoice to.

Once this is filled the customer Name will get pre populated to the Invoice client details > Select Customer area.

4. Invoice No: You can place a custom invoice Number or can generate an auto generated Unique Number.
5. Date of Issuance/Date of Expiry: Can set the Invoice Creation date and Invoice expiry date Here.
6. Add Invoice Line Items – Here you can add Products for the Invoice which you are creating.

1. Add Product Name
2. Enter Product Price
3. Enter the Quantity of your Product

7. Select Template: You can select Pre-Created Invoice templates which pre fill based on the products and items defined previously.
8. Edit/Delete: You can Edit or delete existing Product(s)
9. Add Additional Chargers: You can set Taxes or other Extra chargers here. (Please note, to Assign Additional chargers first you have to create additional chargers under Settings > Invoice, Payment links Taxes area)
10. Add Customer Notes: Can set here some Texts/Notes to show in the Invoice to your Customer.
11. Terms and Conditions: You can assign Terms and conditions for the Invoice (Please Note, to assign first you have to create Terms & Conditions on Settings > Invoice, Payment links Taxes)
12. Generate Invoice/ Save Invoice: If you click Generate Invoice it will create a invoice and will be sent to your customer and if you click save invoice the created invoice will be stored for you to send at a later date.

Create Bulk Invoices

Good Morning Harshaka Dilan

This Account is now Live. Please replace Sandbox API with Live API to start live payment transactions

Live Mode

Collapse Notification X

Total Account Balance
LKR 3,717,542.80

Dashboard >

Transactions >

Settlements >

Invoices >

Payment Links >

Reports & Metrics >

Customers >

Settings >

Harshaka Dilan

Customer Details

Currency Type **1**
LKR

Client Name **2**

Select Customer Group **3**

Invoice Number

Enter or Generate Invoice #

Date of Issuance **4** Date of Expiry

Select Date Select Date

Total Invoice Value
LKR 200,000.00

SAVE BULK INVOICE

Need Help with the System?

Add Invoice Line Items

My Template 01 **6**

#	TITLE & DESCRIPTION	RATE/ITEM	QTY	TOTAL
1	Laptop	LKR 65,000.00	3	LKR 195,000.00
2	Pen Drive	LKR 2,500.00	2	LKR 5,000.00
Total Payable				LKR 200,000.00

Add Additional Charges

Customer Notes

Add Customer Notes **8**

Terms & Conditions

Add or Select Terms & Conditions

Filters & Reports

Past 30 Days

Status

- Paid
- Payment Pending
- Payment Pending
- Payment Pending
- Payment Pending
- Payment Pending
- Payment Pending
- Payment Pending

6 INV-001230-00027 Mar 2, 2021 USD 11,660 Yuga Nava https://webxapi.online/invoice_detail/6

7 INV-001230-00026 Mar 2, 2021 LKR 240,100 paala aiya https://webxapi.online/invoice_detail/5

1. Currency Type: You can set the Invoice creation currency on this Drop down (Please note The currencies assigned might differ based on the set base currencies)

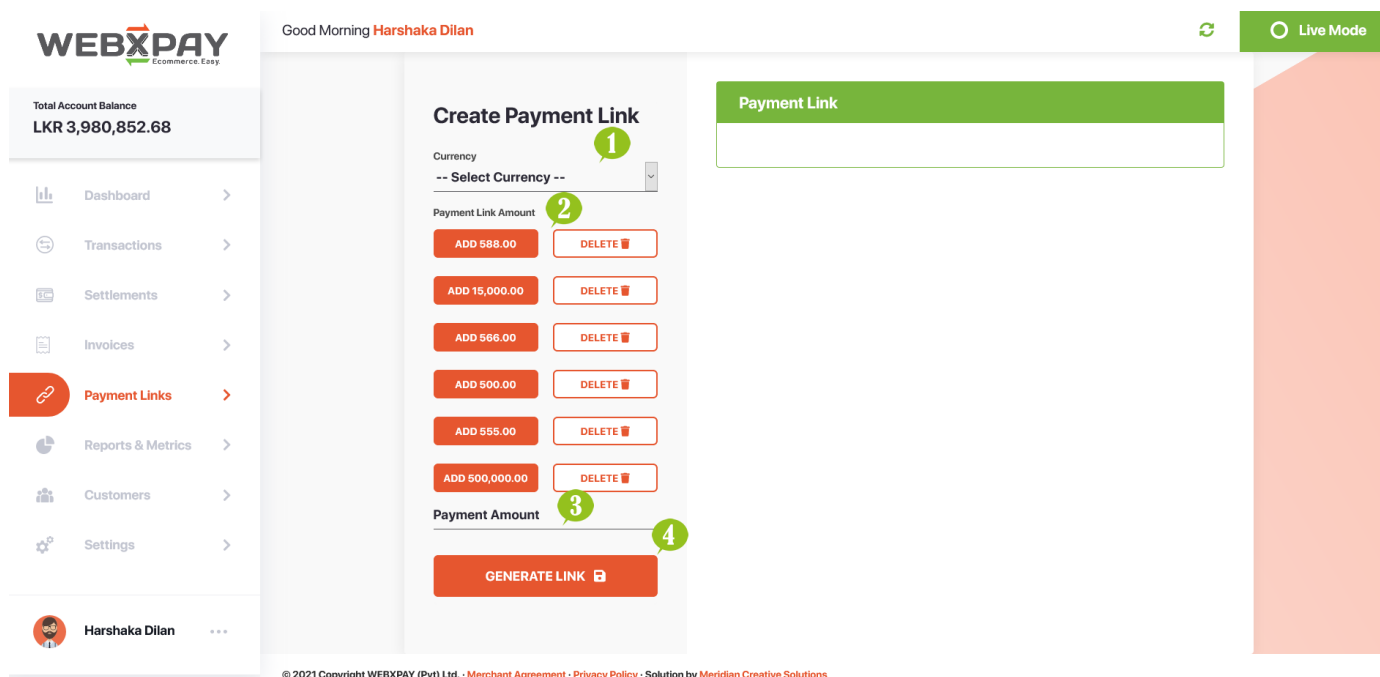
2. Select Customer group: You can add predefined customer Groups here

*** Adding Customer Groups will show on Customers Tab ***

3.4.5.6.7 And 8 options are same as the [Create New Invoice](#)

- **Payment Links (X-SELL)**

X-SELL will enable merchants to generate payments links with click of a button. You will only require to select the currency type, and enter the amount and system will generate a link which can be shared on social media channels or via other platforms.



Please find below the steps to be taken during the creation of the links

1. Currency: You can select the currency type here for your creating link. (Please note the Currencies assigned might differ based on the set base currencies)
2. Payment link Amount: This will act as a history for the past links that are already generated. If required, it can be deleted by clicking on the delete button.
3. Payment Amount
4. Generate Link: Once step 1,2 or 3 have been clicked you can generate the payment link.

Create Payment Link

Currency
LKR


Payment Link Amount

ADD 588.00	DELETE
ADD 15,000.00	DELETE
ADD 566.00	DELETE
ADD 500.00	DELETE
ADD 555.00	DELETE
ADD 500,000.00	DELETE

15000.00








GENERATE LINK

Payment Link



LKR 15,000.00

Share



PAY NOW

Once you click the generate Link above screen will appear.

1. Generated QR code: You can share this QR code manually to your customer or can use this for on shop scan and pay.
2. Amount the link was generated and the currency
3. Sharing options: You can choose any method shown here to share the link Payment link. You just have to click the Social sharing button for which you wish to share the link
4. Pay Now – This button can be used for the instant payment option as a POS system.

Once you share the payment link with your customer by any of the methods, the customers can easily click and pay.

• Reports & Metrics

This section of the system would enable merchants to download the required reports as per the selection of their choice. The reports also accommodates smart filter features for ease of use.

Good Morning Harshaka Dilan

Live Mode

WEBXPAY
Ecommerce. Easy

Total Account Balance
LKR 3,980,852.68

Dashboard >

Transactions >

Settlements >

Invoices >

Payment Links >

Reports & Metrics >

Customers >

Settings >

Harshaka Dilan

Reports & Metrics

Generate Reports

Select Report Type (1)
Transaction Report

What is a Combined Report?
This report provides all transactions (Transactions, Settlements, Refunds, etc.) that were made in the selected date range.

Transaction ID

Transaction Status (2)
Select Status

Transaction Value

Transaction Date Range Filter (4)
31 Days

Download CSV (5)

GENERATE REPORT (3) CLEAR FILTERS

#	Transaction ID	Transaction Value	Date of Transaction	Status
4371	B437120211152426	LKR 12.30	Mar 15, 2021	Approved
4370	D437020211152425	LKR 1.00	Mar 15, 2021	Approved
4369	D436920211152424	LKR 200.00	Mar 15, 2021	Approved
4364	T436420211152423	LKR 180,000.00	Mar 15, 2021	Approved
4362	T436220211152422	LKR 15,000.00	Mar 15, 2021	Approved
4358	T435820211152420	USD 566.00	Mar 15, 2021	Approved

The features;

1. Select Report Type: You can select the report type you require. In here and you can select the Following reports.
 - ***Customer Report** – You can download a full list of Customers who you have created using the invoice Feature
 - ***Transaction Report** – Can populate a full list of Transactions here
 - ***Refund Report** – Can get a full data sheet of Refunds here
 - ***Due Report** – Here you can get a full list of Due payments
 - ***Settlement Report** - Here you can get a full list of Settlements that have been done by WEBXPAY to Your bank account
 - ***Invoice Report** – You can get a detailed Report of invoices (X Direct) you have used.
 - ***Promotional Transaction Report** – Can get a full report of your Promotions (BIN's).

Reports & Metrics

Generate Reports

Select Report Type

Promotional Transaction Report

What is a Report?

This report provides all transactions (Transactions, Settlements, Refunds) that were made in the selected time range.

Transaction ID

Transaction Value

Download CSV

Store Reference

Customer

Customer Detail

Transaction Status

Select Status

Transaction Date Range Filter

31 Days

Transaction Currency

Select Currency

Payment Type

Payment Type

SEARCH

CLEAR FILTERS

On Download CSV button you can get the full report on CSV format and it consists of the breakdown of the Convenience / Bin / Discount fees as show as follows.

J13																
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2				Transaction Report -												
3																
4	Transaction Date	Store Order ID	Customer First Name	Customer Last Name	Transaction ID	Processing Currency	Order Amount	Convenience Fee / Discount	Transaction Amount	Gateway Discount	Transaction Net	Payment Gateway	Card Type	Card Number	Payment Status	
5																
6	19-Jul-21	12345	Yuga	Nawarathnan	T55382021119	LKR	10000	500	9500	380	9120	HNB Cybersource	Visa	411111***	Approved	
7	28-Jun-21	12346	Safna	Rahim	T512620211282730	LKR	20000	1000	19000	760	18240	HNB Cybersource	Visa	411111***	Approved	
8																
9																
10																

2. Filters: You can set the filters for your search criteria here
3. Generate Report: Once you have set the filters you can click Generate Report to populate Your report.
4. Transaction Date Range Filter: You can set date range you wish to populate your report.
5. Download: Here you can click and download your CSV file of the report

• Customers

Good Morning Harshaka Dilan

This Account is now Live. Please replace Sandbox API with Live API to start live payment transactions.

Live Mode

Collapse Notification X

Total Account Balance
LKR 3,717,542.80

Dashboard >

Transactions >

Settlements >

Invoices >

Payment Links >

Reports & Metrics >

Customers >

Settings >

Harshaka Dilan

All Customers
3 Customers

Customer Groups
3 Groups

Keywords
Enter Keyword(s) **1**

SEARCH CLEAR

#	First Name	Last Name	Email Address	Phone Number	Active Since
001	yugan	Nawarathnan	yuga@gmail.com	0773756035	Mar 2, 2021 ... 2
002	krishantha	Perera	krisha@gmail.com	0777478988	Feb 26, 2021 ...
003	Romello	Fernando	romelo@gmail.com	0777478913	Feb 26, 2021 ...

PREV **1** NEXT

+ **3**

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1. Filter area of you customer search. You can place anything
Ex. Name, Contact no, email to
filter your search.
2. Click to edit your existing customer details.
3. Create New Customer

You can fill the customer details on the window popup to add a customer once you click Create New Customer.

Customer Details

First Name
Enter Customer First Name

Last Name
Enter Customer Last Name

Email Address
Enter Email Address

Contact Number
Enter Phone Number

Website (Optional)
Enter Website URL

Address Line 1
Enter Street Address Line 1

Address Line 2
Enter Street Address Line 2

City
Enter City

Country
Select

SAVE

Need Help with the System?

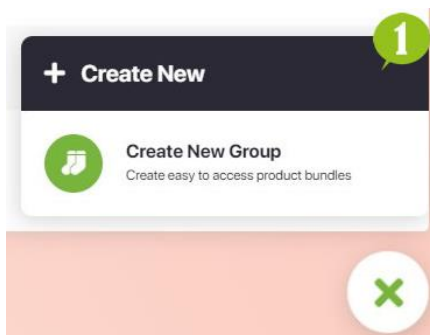
Customer Group

Customer groups is used to create a combined list of customers for bulk invoice sending

The screenshot shows the WEBXPAY dashboard with the 'Customers' section selected. The top navigation bar includes a greeting 'Good Morning Harshaka Dilan', a 'Live Mode' toggle, and a notification banner stating 'This Account is now Live. Please replace Sandbox API with Live API to start live payment transactions.' The left sidebar lists various dashboard functions, with 'Customers' highlighted. The main content area displays 'All Customers: 3 Customers' and 'Customer Groups: 3'. A search bar with a 'KEYWORDS' label and a 'SEARCH' button is present. Below the search bar is a table with columns: '#', 'Group Name', 'Customer Names', and 'Status'. The table lists three customer groups, each with a status of 'Active'. A 'PREV' button and a 'NEXT' button are located at the bottom of the table. A green circle with a plus sign is visible in the bottom right corner of the table area.

#	Group Name	Customer Names	Status
001	Customer Group 1	krishantha Perera,	Active
002	Customer Group 2	krishantha Perera,	Active
003	Customer Group 3	Romello Fernando, krishantha Perera,	Active

1. Filter area of you customer Group search. You can place anything Ex. Group Name, Customer Names to filter your search.
2. Click to edit your existing customer Group details.
3. Create New Customer Group.



1. Click Create New Group

2. Enter a Name for your Customer Group
3. Place a simple Description about Your Group
4. Type your customer names to add to the particular group and Click save Customer Group button to save the Group which you Have created.

• Settings

1. You can click and upload your store logo here

2. and 3. Business information tab – you can see the registered company details with WEBXPAY here.

You cannot do modifications here. If you need to change some here you have to contact WEBXPAY support team.

4. Social media accounts – Here you can place your social media links.

5. Invoice, Payment links and taxes

Business Configuration

General

Invoices, Payment Links & Taxes

Invoices

Additional Charges

Terms & Conditions

Additional Charges

Manage Additional Charges

#	Tax/Charge Name	Type	Rate	
1	gift wrap	Fixed Price	150 LKR	...
2	vat	Percentage	8 %	...

PREV 1 NEXT

1. You can add additional chargers here. Ex: Vat, NBT, Delivery chargers
2. Terms and conditions – Your company terms and conditions can place here and this terms and conditions will appear on your sending invoices.

6. Website Integration

SAVE LOGO

REMOVE LOGO

Business Information

Website Integration

Bin Integration

Integration

Public Key

```
-----BEGIN PUBLIC KEY-----
MIGHMAOGCSqGSIb3DQEBAQUAA4GNADCBgQQCvLjaQKObisZfepcOkvUwDBr0z
QqcCtsfD29RtYdJ8IL5Wj+kmFBOiJXbQeSlgzmkdUejguTlS3PHqUjYb1EiFaLQ
CxW5oUWCwFSNYPUAve+6wa/j6JFTfx4lvJHDiWeIBDrZMZ/wS6YTU+BnMvFhFj
JaT9Q/mwtmXhD0dbQIDAQAB
-----END PUBLIC KEY-----
```

Secret Key

```
94078f01-cad2-4fd7-8f89-e523b6d06ddc
```

Add Return Uri

```
https://samppathipg.infinityfinder.com/response/
```

Convenience fee

Manage Convenience fee

Gateway	Discount / Convenience Fee (+/- in percentage value)	
HNB - LKR	0.00	
Commercial Bank - LKR	35.00	
Commercial Bank - USD	0.00	
HNB - USD	0.00	

SAVE RETURN URL

SAVE

1. You can get your unique Public and secret keys from here for your payment gateway Integration.
2. Add Return URL – Once the transaction completed from the gateway end, your customer wish to see the status of his/her transaction. To show that you have to place a Response link here.
3. Convenience fee – You can add an extra fee or a discount on based on the payment gateway used.

Update Discount / Convenience Fee (+/- in percentage value)

-10

SAVE

7. Bin Integration – Adding Promotional discounts based on the Card which the customer use is can be added on here

Bin Information

1

Status: --Select--

Bin Range Start:

Bin Range End:

Description:

Start Date:

Expiry Date:

SEARCH

CLEAR

2

ADD NEW BIN DISCOUNT

3

#	Description	Bin Range Start	Bin Range End	Discount(%)	Start Date	Expiry Date	Status	
1	NTB Promo	411109	411109	-20.00	2021-07-20	2021-07-23	Active	
2	Commercial Bank Promo	344545	754545	-45.00	2021-07-16	2021-07-22	Active	
3	Sampath Promo	4100000	4500000	-25.00	2021-06-25	2021-07-01	Active	

4

1. Filters for the previously added BIN's
2. Add new BIN Discount – To create new BIN with a Discount you have to click here

#	Description	Bin Range Start	Bin Range End	Discount (%)	Start Date	Expiry Date	Status
1	NTS Pre				2021-07-20	2021-07-20	Active
2	Comm				2021-07-16	2021-07-16	Active
3	Sampr				2021-06-25	2021-06-25	Active
4	highly				2021-06-02	2021-06-02	Active
5	JP				2021-06-25	2021-06-25	Active
6					2021-06-03	2021-06-03	Active
7					2021-06-02	2021-06-02	Active
8					2021-04-20	2021-04-20	Active
9	mail				2020-09-15	2022-09-15	Active

- On Description field add a simple description to identify your promotion. Ex: NTB Promotion, HSBC Promotion etc...
- Then Enter the Bin Range which you received from your bank. Ex: Bin Range Start = 444444, Bin Range End =555555
- Add promotion start dated and expiry Date
- Finally set the status of your promotion which is Active or Inactive.

3. Previously Added Bin Promotions.

4. Edit Previously added Bin Promotions. (Please Note you cannot edit BIN Ranges)

8. Roles, Profiles and Permissions

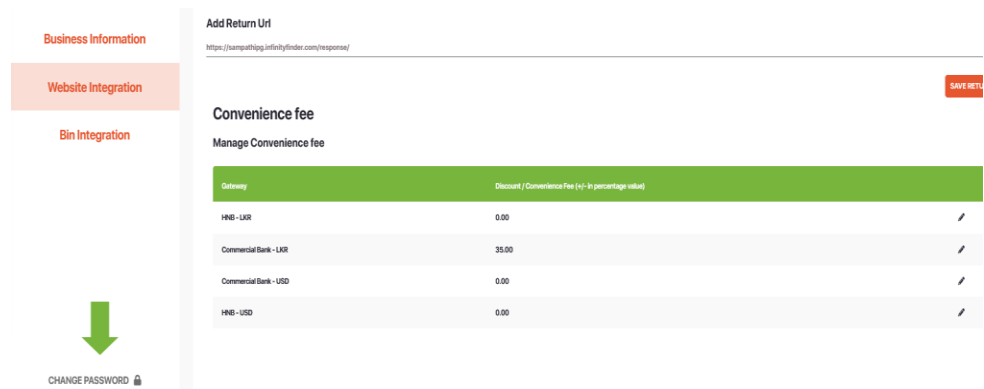
User Role Type	Created Date
Manager	Sep 16, 2021

First go to “User Roles & Permissions” and create a Role with the permissions and save.

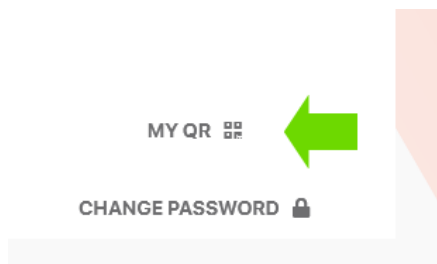
Then go to User Profiles and assign the created role to your staff member.

Change Existing WEBXPAY Dashboard Login Password

You can find the Change Password option on the bottom of the settings page - →→→



• MY QR



You can create a unique QR for your shop from here. So your customers can directly scan it on your shop premises and do the payment. →→→



Vegi Shop

Currency Type

Select

Payment Amount

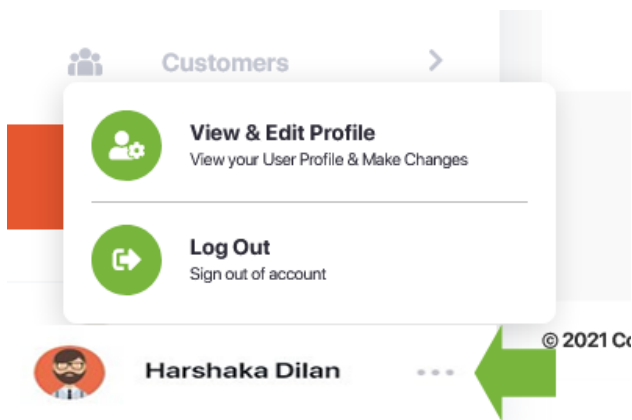
Payment Amount

Description

Payment Description

Submit

• Sign-out



To Sign-out from your dashboard you can click the small 3 dots near your Name at bottom left of your screen. Then click Log Out to fully sign out from your system.
