

# UPTRADER

Cutting edge CRM for Forex and CFD Brokers



General

# ABOUT UPTRADER

UpTrader is a team of **30 professionals** whose goals are identical to those of brokers — our customers:

- Maximized profit
- Tailored conditions
- Effective acquisition and retention of clients.

For **over 10 years** we have been creating software of any complexity to meet the most demanding requirements. We offer both custom **software development** as well as our state-of-the-art SaaS products such as **UpTrader CRM**.

10

years  
experience

30

professionals  
in the team

1 mln

traders use  
UpTrader Solutions

190

countries are home  
to UpTrader clients





General

# UPTRADER CRM

Main structure



## Admin

You

Payment systems   ■   Management   ■   Departments  
7 languages   ■   Google analytics   ■   Notification  
Trading platforms   ■   Specification   ■   KYC  
Partnership rewards



## Back office

Your staff

Bonuses management  
Advertising campaigns management   ■   Client support  
Deposit/withdrawal   ■   Partnership program management



## Client interface

Your customers

Trading and financial tools   ■   Comprehensive data



## Sales module

Your perfect sales team

Very friendly interface   ■   Good structure  
Planning deposits   ■   Charts   ■   Mails   ■   Calls  
Well organized clients' data



## Investment service

MT4, MT5

PAMM   ■   MAM   ■   Social trading

# UPTRADER CRM FEATURES

We describe all features for different users.

We would like to show how CRM features work from different sides: Clients interface, Back Office, Administrator, Partners.

1 | Registration/KYC

2 | Deposit/Withdrawal/ Wallet

3 | Easy account management

4 | Partners

5 | Free technical analysis, calendar, news

6 | Bonuses

7 | Statuses

8 | Trading platforms

9 | Investment service

10 | Sales module

11 | Prices

12 | Contacts





Client

# REGISTRATION /KYC


**Client/Partner**

- Smooth registration
- Instant verification in a few clicks
- No routine processes for clients or partners

UPTRADER

CLIENT INTERFACE

BALANCE  
\$0.00

 **Johnathan Golden**  
UNVERIFIED

Wallet

Accounts

RAMM Rating

Statuses

FINANCES

Deposit

Withdraw

Internal transfer

PARTNERSHIP

Partner tools

IB Program

Personal information

Documents

Personal profile

My cards

Security

Notification settings

Agreements

General information

First name  
Admin

Middle name  
Admin

Last name  
Admin

Tax residence  
Tax tax tax

Birthday  
11.08.1992

Nationality  
Русский

Rus

Phone  
+7 999 000 99 99

E-mail  
e.korkornikova@yandex.ru

☒ I am not US citizen or US person for tax purposes

Address

Country  
Russia

State / province  
Moscow

City  
Moscow

Adress  
Soyznyi pr. 14/9

The most amazing  
bonus ever!

Up to 200% to each  
deposit. Don't miss!

LET'S GET IT!

Back office

# REGISTRATION /KYC



## Back office

- Email confirmation

Do you want clients to confirm their emails or not? You can switch it on or off if you don't want them to get stuck while registering.

- List of all clients/partners

Your staff can see all new clients and partners in a list. They can filter them by registration date, region, status, partner's code and so on. New leads show up on top of the list with all crucial information like name, phone number, email, partners' code, status, country, utm.

The screenshot shows the 'UPTRADER BACK OFFICE' interface. At the top, there's a header with the logo, navigation links, and a user profile for Johnathan Golden. The main section is titled 'Users' and includes a search bar, filters for status and profile validity, and a table of users. The table has columns for Full Name, Email, Phone, Date Joined, Manager, Partner, IB Account, Status, and IS Active. Below the table, there's a 'Get a client' button and a count of 134 free clients. A modal window titled 'User' is open, showing detailed information for a specific user.

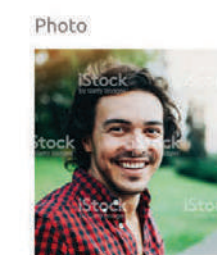
FULL NAME	EMAIL	PHONE	DATE JOINED	MANAGER	PARTNER	IB ACCOUNT	STATUS	IS ACTIVE
Dustin Morton	nora.steuber@sch...	+7 915 248 99 63	06/25/2018	Manager Manager	Manager Manager	5548752	VERIFIED	●
Leonard Hofstadter	carlo.murray@gm...	+7 915 248 99 63	12/17/2018	Harry Potter	Harry Potter	8022487	FAILED	●
Trevor Joseph	hag							
Lucile Matthews	lea							

### User

Information Accounts Payments Bonuses History Notes All sessions

#### Personal information

Email	nora.steuber@schmitt.me	Verification status	VERIFIED
Phone	342-162-2227	Profile validity	VALID
Registration date	01/17/2020	Activity	WAS TODAY
Last name	User	Partner code	NONE
First name	Analyzed	Password	*****
Manager	John Silver	Status	classic



#### Last UTM mark

Campaign	Winter 2020_CPC	Medium	Organic
Type	Banner	Device	Desktop



Client

# DEPOSIT/ WITHDRAWAL/ WALLET



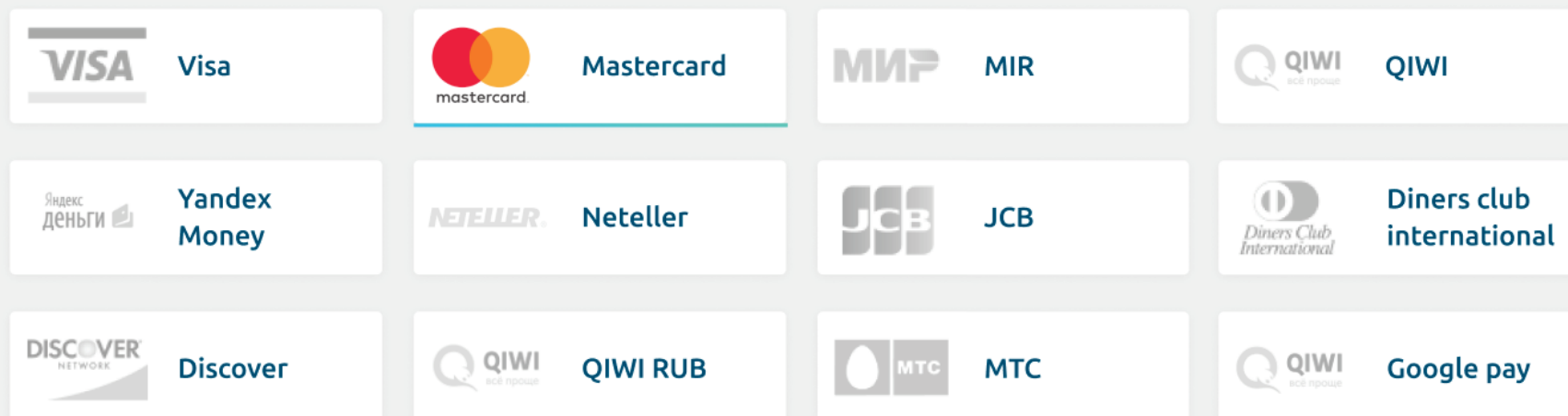
## Client

Payment system selection

Clients from different regions can choose using which payment system they want to deposit their trading accounts or wallet. They can see commissions and fees right away. Only verified clients can make deposits.

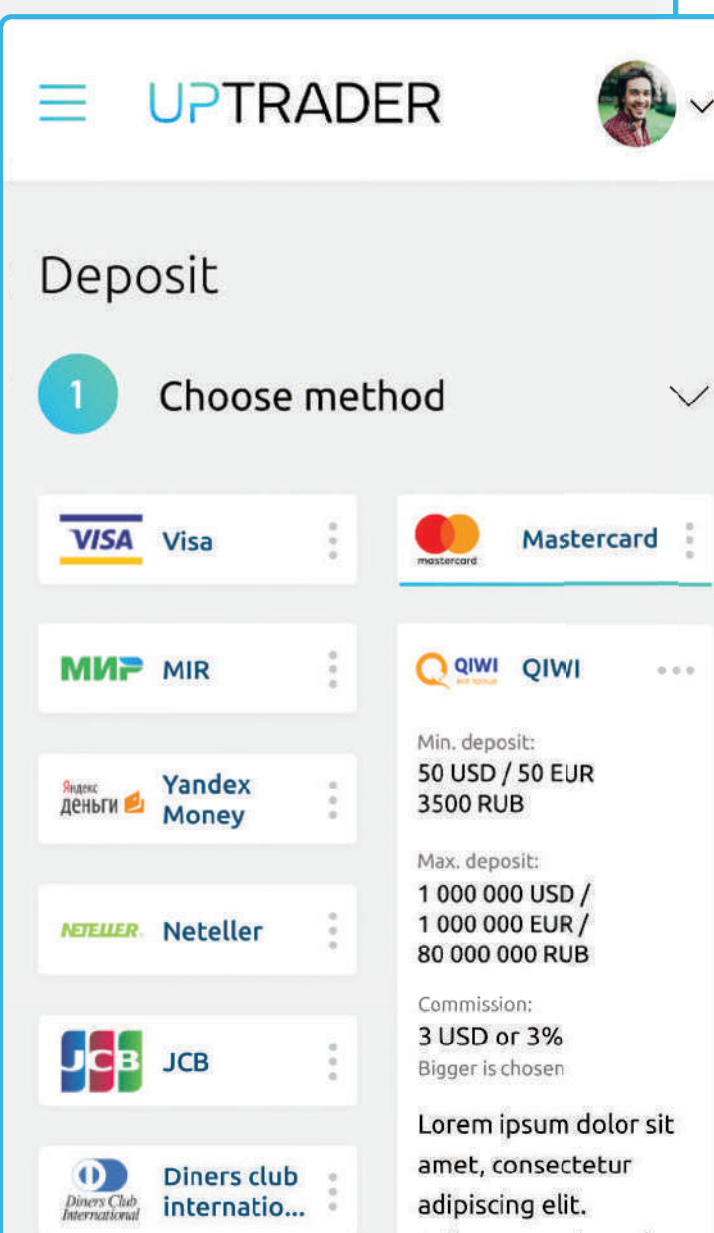
## Deposit

### 1 Choose payment method



### 2 Enter the sum

### 3 Enter additional info



Back office

# DEPOSIT/ WITHDRAWAL/ WALLET



## Back office

Approval of deposits/withdrawals, KYC

Your staff can see and process all deposit and withdrawal requests. Notification system alerts clients about every step of KYC and deposits/withdrawals progress.

### Withdrawals approving

Search

Amount  
From 1 to 1000000

USD

Select assignment

Select status

FULL NAME

E-MAIL

AMOUNT

ASSIGNED

STATUS

Peter Shamoway

[mr.Peter\\_Sh99@gmail.com](mailto:mr.Peter_Sh99@gmail.com)

1 866 000.00 USD

To me

IN PROGRESS

Mukesh Dhirubhai Ambani

[Mukesh\\_Dhirubhai07@gmail.com](mailto:Mukesh_Dhirubhai07@gmail.com)

2 460.00 USD

All

APPROVED

Smith Jackson

[Jackson\\_Cucumbercity@uptrad...](mailto:Jackson_Cucumbercity@uptrad...)

12.00 USD

To me

REJECTED

Taiwo Afolabi

[Taiwo\\_Afolabi@gmail.com](mailto:Taiwo_Afolabi@gmail.com)

1 866 000.00 USD

T

Hubert Blaine

Wolfeschlegel-Bergerdorff

[Wolfeschlegel@gmail.com](mailto:Wolfeschlegel@gmail.com)

2 460.00 USD

A

ID

Account

Commission

Conversion course

Amount

Payment

Show all requests

### Withdraw request approval

Step 1

Managers

Step 2

Chief manager

Risk management

Step 3

Financial department

Auditors:

Financial department

Iron bank

Free cities

Reasons:

New requisites

Withdraw amount more than 1000 USD

Internal comment

Trading history OK

Approve

Reject

### User's withdraw requests

ID

ACCOUNT

COMMISSION

CONVERTATION  
COURSEPAYMENT  
SYSTEM

CREATE

[891](#)

101117634

10%

1 USD = 0.9 EUR

Mastercard

09/10/2

[199](#)

101117635

5 USD

1 USD = 0.9 EUR

QIWI

09/10/2

[891](#)

101117634

10%

1 USD = 0.9 EUR

Mastercard

09/10/2

[199](#)

101117635

5 USD

1 USD = 0.9 EUR

QIWI

09/10/2018

540 USD

Reject

[891](#)

101117634

10%

1 USD = 0.9 EUR

Mastercard

09/10/2018

14 000.00 USD

Reject

[199](#)

101117635

5 USD

1 USD = 0.9 EUR

QIWI

09/10/2018

540 USD

Reject

Total

for all the time

Total amount

43 620 USD



Partner

# DEPOSIT/ WITHDRAWAL/ WALLET



## Partner

Can see all client money in reports

Your partners can see client's money in the reports or visual charts on the dashboard.





Admin

# DEPOSIT/ WITHDRAWAL/ WALLET











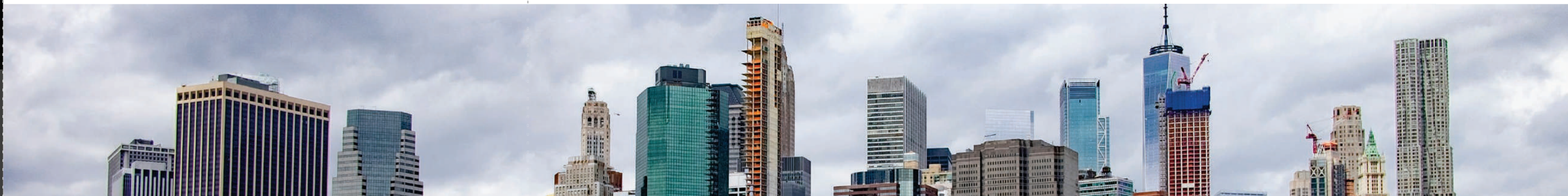
Admin

Adding new payment methods

## Payment System Settings

[+ Create](#)

ID	TITLE	PAYMENT SYSTEM TITLE	
4	Manual Indian Exchanger	ManualIndianExchanger	 
3	FNB Namibia	ManualFBNamibia	 
2	FNB South Africa	ManualFNBSouthAfrica	 
1	manual	Manual	 





Client

# WALLETS




Client

The wallet is your non-trading account used to deposit funds, to distribute them to your trading accounts and withdraw them back.

Admin chooses the way to deposit money. It can be directly to a trading account, through a wallet, or both ways.

### Wallet

Wallet number

 125488921

Balance

\$2345

Deposit

Withdraw

Internal transfer

In-out requests

Internal transfers

Search

Status

Transfer type

ID	E-MAIL	STATUS	AMOUNT	TRANSFER TYPE	CREATED
18966154	<a href="mailto:ekaterina.kornikova@uptrader.io">ekaterina.kornikova@uptrader.io</a>	● FAILED	\$10000	To another trader	16:30 10/09/2019
18966154	<a href="mailto:v.rustee@gmail.com">v.rustee@gmail.com</a>	● APPROVED	\$2460	Internal transfer	09:11 10/09/2019
18966154	<a href="mailto:yurii_podpodustenko@uptader.io">yurii_podpodustenko@uptader.io</a>	● REJECTED	\$2460	To another trader	16:11 10/09/2019
18966154	<a href="mailto:holy_sipher@mail.ru">holy_sipher@mail.ru</a>	● WAITING FOR APPROVAL	\$15000	Internal transfer	09:11 10/09/2019
18966154	<a href="mailto:beatrix_84@gmail.com">beatrix_84@gmail.com</a>	● FAILED	\$10000	To another trader	16:30 10/09/2019

The wallet is designed to make it easier for you to manage your finances. This is especially true if you use more than one trading account. In order not to deposit each account separately through payment systems, and also not to withdraw funds from each account separately. You use only the wallet.

Client

# EASY ACCOUNT MANAGEMENT



Client

## Opening accounts

A client sees the list of account types available at a brokerage and can choose the best one for them

The screenshot displays the 'Accounts' section of the UPTRADER platform. It features summary statistics at the top: 1023 total real accounts, 100500 as the most profitable deal of the week, and 25 deals on this week. Below this, there are two main sections: 'Trade accounts' and 'Demo accounts'. The 'Trade accounts' section includes a table with columns for LOGIN, LEVERAGE, BALANCE, and EQUITY. It lists two accounts: 123213 MT4 with a leverage of 1:40 and balance of \$0, and 234545 MT5 with a leverage of 1:50 and balance of \$22. A tooltip for 'Internal transfers' is visible over the second account. The 'Demo accounts' section also has a table with columns for LOGIN, LEVERAGE, BALANCE, and EQUITY, listing two accounts: 232145 Real Option with a leverage of 1:50 and balance of \$22, and 234545 Real Option with a leverage of 1:50 and balance of \$22. A modal window is open on the right, showing a detailed view of the account 234545, including its type (Real Option), equity (\$2345), free margin (\$254), and options for Deposit, Withdraw, and Int. transfer.

**Accounts**

1023 Total on real accounts

100500 The most profitable deal of this week

25 Number of deals on this week

**Trade accounts** [+ Live account](#)

LOGIN	LEVERAGE	BALANCE	EQUITY	
123213 MT4	1:40	\$0	\$2345	
234545 MT5 Manager's account of strategy <a href="#">High-rate fund</a>	1:50	\$22	\$2345	

**Demo accounts** [+ Demo](#)

LOGIN	LEVERAGE	BALANCE	EQUITY	
232145 Real Option	1:50	\$22	\$2345	
234545 Real Option	1:50	\$22	\$2345	

**Accounts** \$10 023

**Trade accounts** [+ Live account](#)

Login	Balance	Leverage	
123213	\$22	1:40	
234545	\$22	1:50	

Account type: Real Option  
Equity: \$2345  
Free margin: \$254

Deposit Withdraw Int. transfer

[Trade](#)



Client

# EASY ACCOUNT MANAGEMENT



Client

## Account settings

A client can choose an account leverage from the list approved by a brokerage, an execution type, and so on.

### Choose account type

Live accounts Demo accounts

R

Real account  
Real MT4 account

BO Real Account

CREATE ACCOUNT

C

CFH Real Account  
CFH ClearPro Real Account

R

RAMM account  
RAMM account

R

Real account  
Real MT5 account

### New account

Leverage  
1:100

Create account

Client

# EASY ACCOUNT MANAGEMENT



Client

## Account history

A client can view all of their trading history, including balance operations and pending orders without having to log in to the trading terminal

— Back to accounts

### Account #20340

Trade

	Type	Balance	Equity	Leverage	Free margin	Password			
	MT4 Real Standard	\$ 1 430.00	\$1 430.00	1:400	\$778.92	Change			

Open orders Closed orders

01.09.2019 - 01.10.2019

ORDER	SYMBOL	TYPE	OPEN TIME	CLOSE TIME	PRICE	LOTS	S/L
1234324	EURUSD	Buy	2 min ago	25/10/2019 08.00 AM	0.78	0.45	0.3
1234324	EURUSD	Sell	2 min ago	25/10/2019 08.00 AM	0.78	0.45	0.3
1234324	EURUSD	Buy	2 min ago	25/10/2019 08.00 AM	0.78	0.45	0.3
1234324	EURUSD	Sell	2 min ago	25/10/2019 08.00 AM	0.78	0.45	0.3

Items on page: 50 ▾ Page: 1 of 12

PREVIOUS NEXT

UPTRADER BALANCE \$123.55

### Account #1175996

Trade

	1175996	MT4 Real Standard
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Balance: \$ 1 430.00  
Equity: \$ 1 430.00  
Leverage: 1:400  
Free margin: \$778.92  
Password: Change

Deposit Withdraw Int. transfer

Open orders Closed orders

Order/ Symbol	Type/ Price	Open/ Close time	
1234324 EURUSD	Buy 0.78	08/26/18 08.00 AM 08/26/18 08.00 AM	...
1234324 EURUSD	Sell 0.78	2 min ago 08/26/18 08.00 AM	...
1234324 EURUSD	Buy 0.78	08/26/18 08.00 AM 08/26/18 08.00 AM	...

Lots: 0.45



# EASY ACCOUNT MANAGEMENT



Admin

## Trading accounts setting

- Admin decides whether to open a trading account for all new users or only for verified clients
- You can choose whether to allow demo trading or only live trading
- Just decide which settings of trading account types to have? What are your leverage levels, which minimal and maximal deposit amount are allowed? What account currencies are available?

## Agreements

Create and upload any agreements you want clients to accept.





Partner

# PARTNERS



Partner



- **Bonuses**

- **Excel reports**

Your partners can get different excel reports, detailing trading volumes of their clients and other data important for their IB rewards. Also you can set up frequency for different types of reports.

- **Promo**

Your partners can motivate their clients by using promo banners to attract new clients.

- **List of clients**

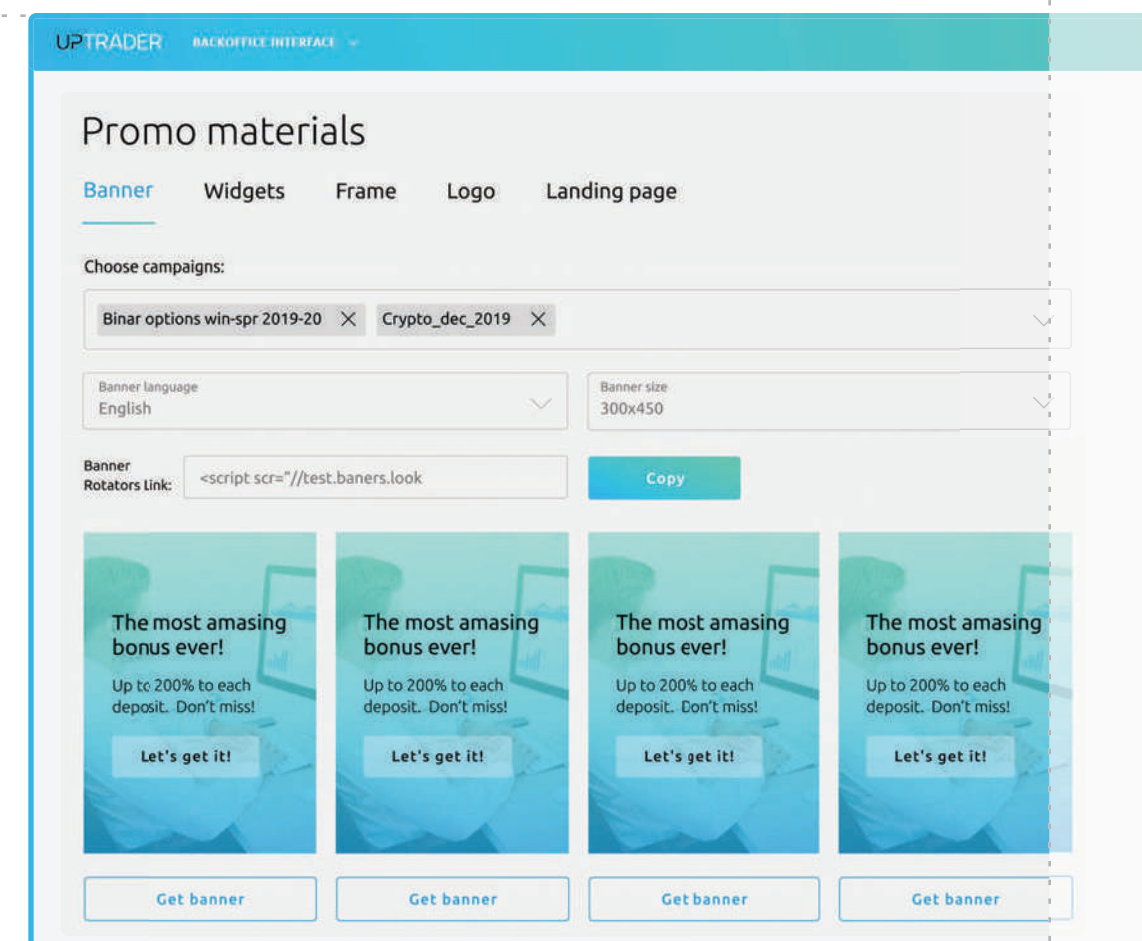
Your partners can see all of their clients, all trading details, their money and their activity.

- **Dashboard with charts**

Charts show efficiency of an IB from month to month.

- **Partnership rewards**

Your partners can see their rewards.





Back office

# PARTNERS



Back office

## ■ Partnership rewards

You can decide whether to pay rewards automatically or approve/reject them manually. Decide which commission you want to pay. Pay every day or every month. Set up conditions individually for every partner.

## ■ Reports

Get reports about every partner as often as you want. Be aware of all events.

## ■ Access to all partner's client's information

Your staff has access to all the partner's client's information and can manage it.

## ■ Dashboards, charts

Use dashboards, charts for easy management

### IB reward template

Template name:

Label

Reward type:

PnL

#### IB settings

PnL percentage:

5

\* Specify percent

#### Sub-IB settings

Enable reward for Sub-IBs: No ☒ YesPercent from  
Sub-IB commission:

5

Sub-IB level

1

\* For commission from  
Sub-IBs. Specify percentPercent from  
Sub-IB commission:

5

Sub-IB level

2

\* For commission from  
Sub-IBs. Specify percent

Add Sub-IBs level

Delete Sub-IBs level

Save changes





Admin

# PARTNERS

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Admin

- **General settings**

You can decide whether you **want** to have a partnership program or not.

Do you want to have **simple** settings or **sophisticated** ones?

Do you allow your partners to see **client phone numbers and emails** or not?

Is it okay for your partners to have a **sub-IB-tree**?

Do you want to process partner awards **automatically or manually**?

- **Settings of partnership rewards**

You decide whether you pay rewards based on trading volume, commissions or spread.

**What percentage** are you ready to pay to IBs and sub IBs?

- **Choose configuration of reports**

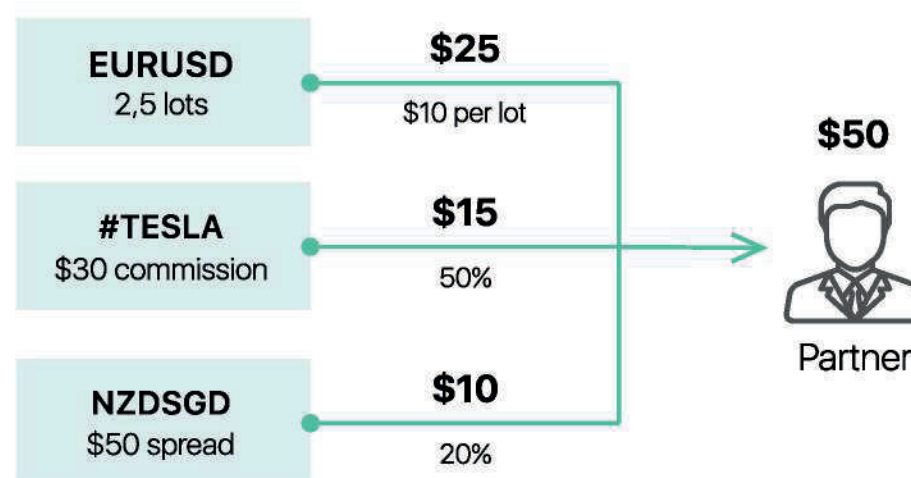
It's all on you what kind of reports your partners can get.



# PARTNERS

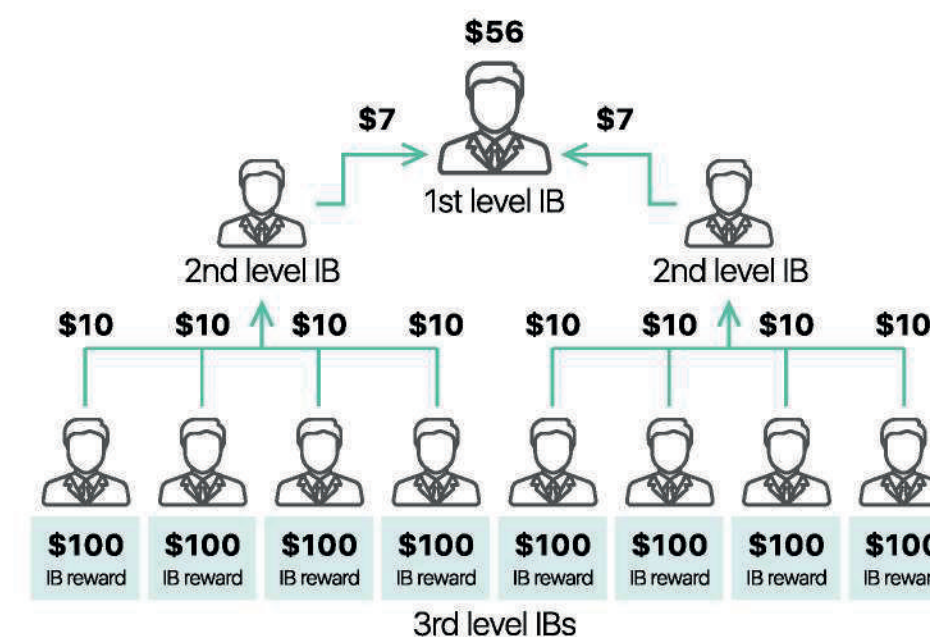
## Partnership rewards

A separate partner payout plan can be implemented for each category of instruments, or a separate plan for each partner: for example, fixed commission for the volume or a percentage of the spread.



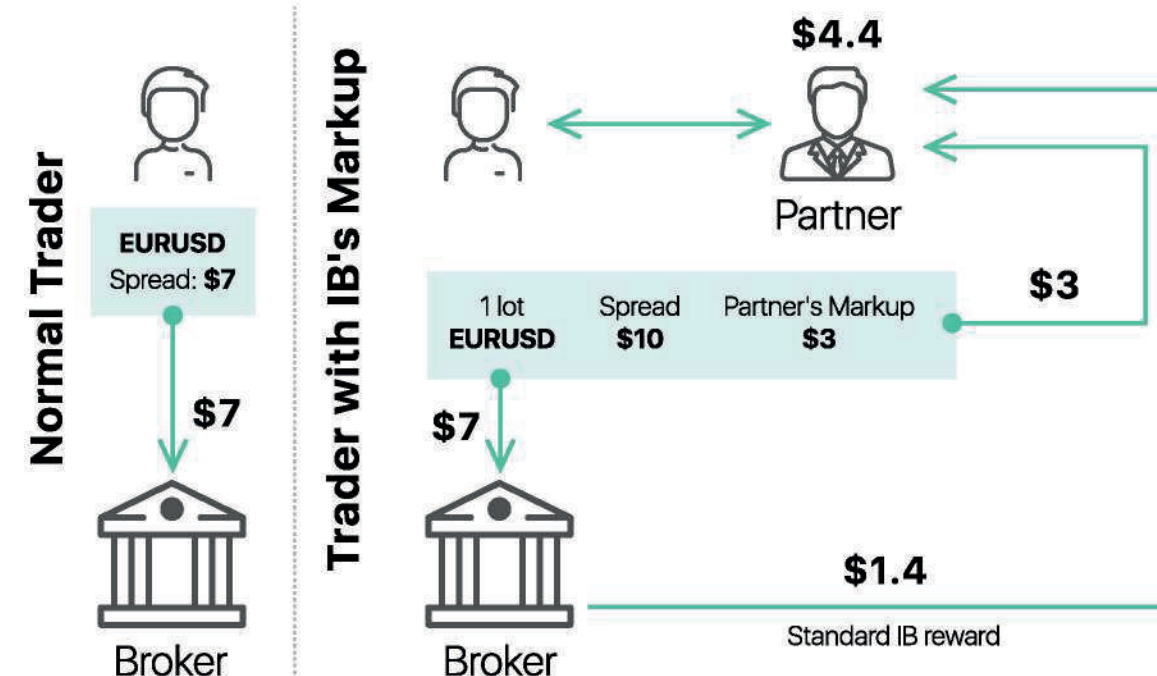
## Multilevel partnership

Partners can now create networks of any depth, while brokers set reward conditions for each level individually. Partners can follow the growth of their network in the personal area and keep track of the clients of their subpartners.



## Partners have access to flexible settings of spread for their clients

Spread increase is very relevant to partners of brokers whose main income is based on commissions. The same plan is also useful to money managers who receive clients' funds for management and earn from the spreads and commissions for the trades. The brokers themselves can use CRM to cap the possible increase of service prices by their partners, or disable this feature completely.



Client

# FREE TECHNICAL ANALYSIS, ECONOMIC CALENDAR, NEWS



Client

Access to daily technical or  
fundamental analysis for your clients  
in the Trader's Room.

News ▪ Technical analysis ▪ Calendar ▪ Special offers

All important information in one place!

Your client can have an analytics feed, important company news, special offers all in their trader's room, without having to go to other websites. Your clients can find everything they need right on your website!

## Technical analysis ↻

[< Previous](#)

1

2

3

...

458

459

[Next >](#)

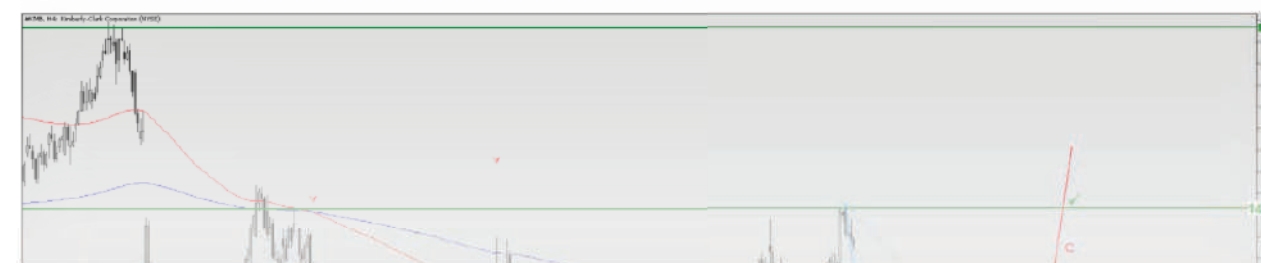
04

June

### Trading Idea for Kimberly-Clark Corporation (NYSE)

#KMB

The overall trend is upward. The support level of 128.64 is holding back sellers. The descending wave pattern is truncated. Awesome Oscillator shows a bullish divergence, while Stochastic Oscillator signals oversold conditions.

[Read more](#)



Back office

Admin

# FREE TECHNICAL ANALYSIS, ECONOMIC CALENDAR, NEWS



Admin/Back office

## Technical analysis

Free feed for the first 3 months!

This is a really good marketing tool. Just use this information to motivate your client to trade more.

## Your staff can publish any news in the Trader's Room!

Having a fresh daily analysis and publishing important company news allows you to attract your client's attention to trading, especially if your clients are newbies.

Marketing tools (adding banners, setting up special offers)

Create good marketing offers, give benefits to your clients. All this can help make your clients loyal to the company.

### Calendar

5 - 11 Jul, 2021

Current time: 14:17 (GMT +3:00)

Time	Currency	Event	Act	Fcst	Prev
10:30	EUR	Markit Construction PMI	50.3		50.3
11:10	EUR	ECB Vice President de Guindos Speech			
11:30	GBP	Markit/CIPS Construction PMI	66.3	55.6	64.2
11:48	EUR	6-Month Letras Auction	-0.586%		-0.576%
11:48	EUR	12-Month Letras Auction	-0.541%		-0.531%
12:00	EUR	Retail Sales m/m	4.6%	0.2%	-3.9%
12:00	EUR	Retail Sales y/y	9.0%	16.5%	23.3%
12:05	EUR	ZEW Economic Sentiment Indicator	63.3	84.1	79.8
12:05	EUR	ZEW Economic Situation	21.9	12.7	-9.1
12:05	EUR	ZEW Economic Sentiment Indicator	61.2	84.4	81.3
12:30	GBP	10-Year Treasury Gilt Auction	0.819%		0.941%
14:00	MXN	Gross Fixed Investments m/m	-0.9%	-0.7%	2.3%
14:00	MXN	Gross Fixed Investments n.s.a. y/y	43.1%	-1.5%	1.4%
14:00	EUR	ECB Supervisory Board Chair Enria Speech			
16:45	USD	Markit Services PMI		64.8	64.8

[Use MetaTrader economic calendar](#)


Back office

# BONUSES



## Back office

Make them stand out: create promo materials and banners, publish news and articles, make them visible to attract client's attention.

You can run all types of bonuses, and create your own!



## Welcome bonus

Usually brokerage companies use this bonus to attract new clients and interest them in trading.

New client > Welcome bonus \$100 > 1 week trading > Ask client to deposit to redeem profit



## Deposit bonus

Use this bonus to motivate your clients to make the first deposit, or deposit more, or deposit more often.

New client/Old client > Deposit from \$100 > Bonus +50% > Your client has \$150 for trading



## Monthly interest

Motivate clients to have money on their accounts permanently. Just offer them an annual interest on the balance.

New client/Old client > Monthly interest 20% on a balance which is more than \$1000



## Manual bonus (any settings)

Use flexible settings to create your own bonuses. You can decide what type, what conditions, what a name and so on you want your bonus to have.

Sales manager > Gives personal offer to make a quick sale > Manual bonus settings



Admin

# BONUSES



Admin

## Manage general settings

- Allow or disable bonuses
- Decide how bonuses are deposited:


Balance - depositing user balance

Credit - Depositing user credit.

## Manage general settings

Let managers give clients individual bonuses right away as they make a sale.

### Bonus description

Title	Bonus with a very long, I'd say dramatically long description	Show translations
Russian	Бонус с очень длинным, я бы сказала, чрезвычайно длинным названием	
German	Bonus mit einer sehr langen, würde ich dramatisch langen Beschreibung sagen	
Chinese	獎金很長，我會說很長的描述	
Description	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.	Show translations
Bullet	Position 1	Show translations
Bullet	Position 2	Show translations
<a href="#">+ Add a bullet</a>		
Logo	Specify logo URL	 Your logo is uploaded
Description	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.	Show translations

Client

# STATUSES



Client

Your client can choose a deposit amount based on status advantages. For example:



Client

Deposit \$100

Newbie

- No bonuses



Client

Deposit \$500

Profi

- All bonuses
- Personal manager



Client

Deposit \$1000

VIP

- All bonuses
- Personal manager
- Reduced swaps
- No commision

UPTRADER

CLIENT INTERFACE

BALANCE  
\$123.55

STATUS



Your status: classic



Johnathan Golden

VERIFIED

## Statuses



Wallet

Your status:

classic



Back office

Admin

# STATUSES



## Admin/Back office

- Setting up any types of statuses. For example:

*Motivate your clients to deposit more by using status advantages: newbie, profi, VIP*

- Or you can assign status based on a client's onboarding progress

*Registration, deposit, trading*

- Or create any types of statuses you like



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Admin

# TRADING PLATFORMS



Admin

On each platform we support:

- Opening new trading accounts
- Deposits and withdrawals
- Viewing trading history and balance operations
- IB calculations and reports
- Bonuses
- Blocking and unblocking accounts

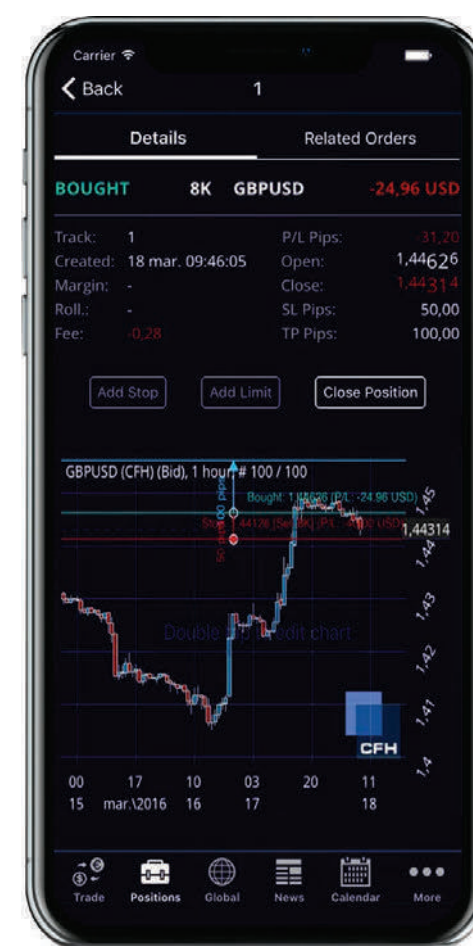
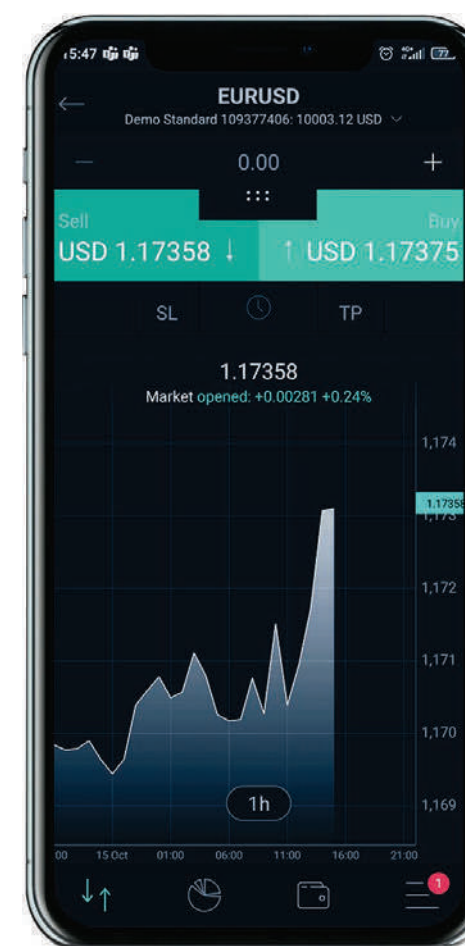
As the **admin**, you can add any trading platform right from your administration interface. All that is needed is just login and password for a manager account at the platform. You can add as many servers as you need, including mixing different platform types, and your clients will see all their account data in one place.

We support the following platforms:

MetaTrader 4



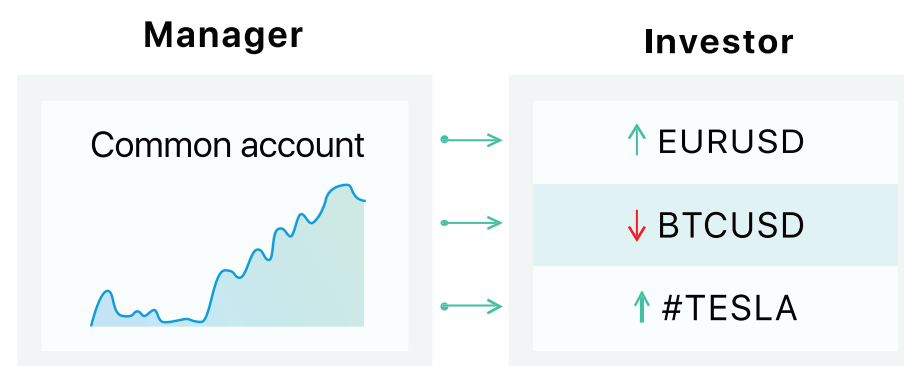
MetaTrader 5

Finalto (CFH)  
ClearProAny other platform  
can be added on  
demand



# INVESTMENT SERVICE

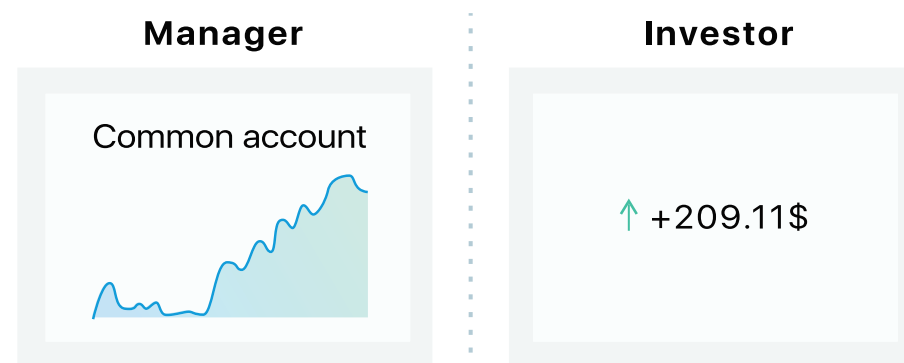
UpTrader Invest can function as any of these systems. Brokers can choose whatever mode they prefer, or enable all three at the same time.



## MAM

Standard mode: the manager trades in a common account, while investors monitor the transactions and see changes in their personal account's balance.

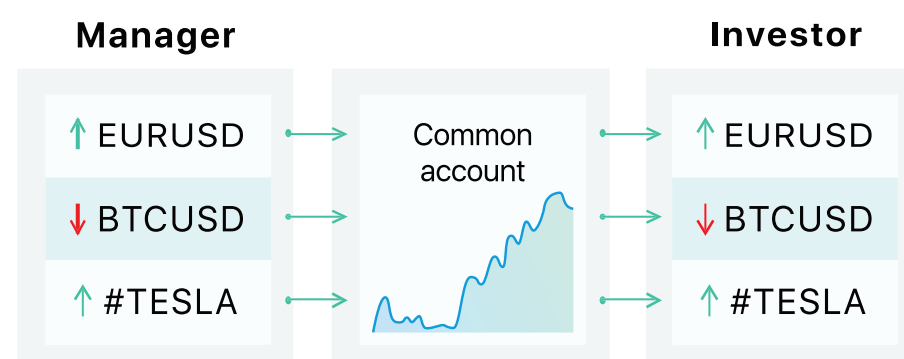
- + Master sees all the funds
- + Investors see individual trades



## PAMM

Similarly to MAM, the manager trades in a common account, while investors have access only to indicative accounts—they can see changes in the account balance, but not trading operations themselves.

- + Master sees all the funds
- Investors don't see individual trades



## Social trading, or copy trading

The trader operates with their personal funds in their personal account, while transactions are copied to the accounts of investors.

- Master doesn't see all the funds
- + Investors see individual trades

General

# INVESTMENT SERVICE



## Master decides

- Master decides **at what time** their investors can deposit and withdraw funds from their investment.
- Approve or reject** an investment in their strategy
- Set up their funds management **reward rate**

## Master can:

- Invest** in their own strategy
- Use automated **trading advisors**
- Choose whether to **allow to withdraw** money from strategy with or without approval, or on a periodical rollovers.

## Investor:

- Can't trade on investment accounts.
- Can follow trading results in the Trader room / Metatrader / Metatrader App.
- Can invest in different strategies at the same time.



# SALES MODULE



## Admin

Manage your sales department efficiently!

## Client distribution settings

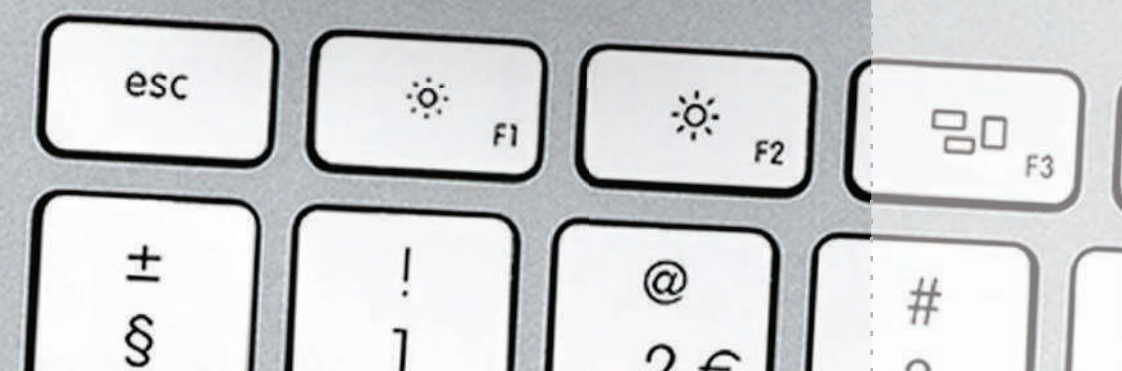
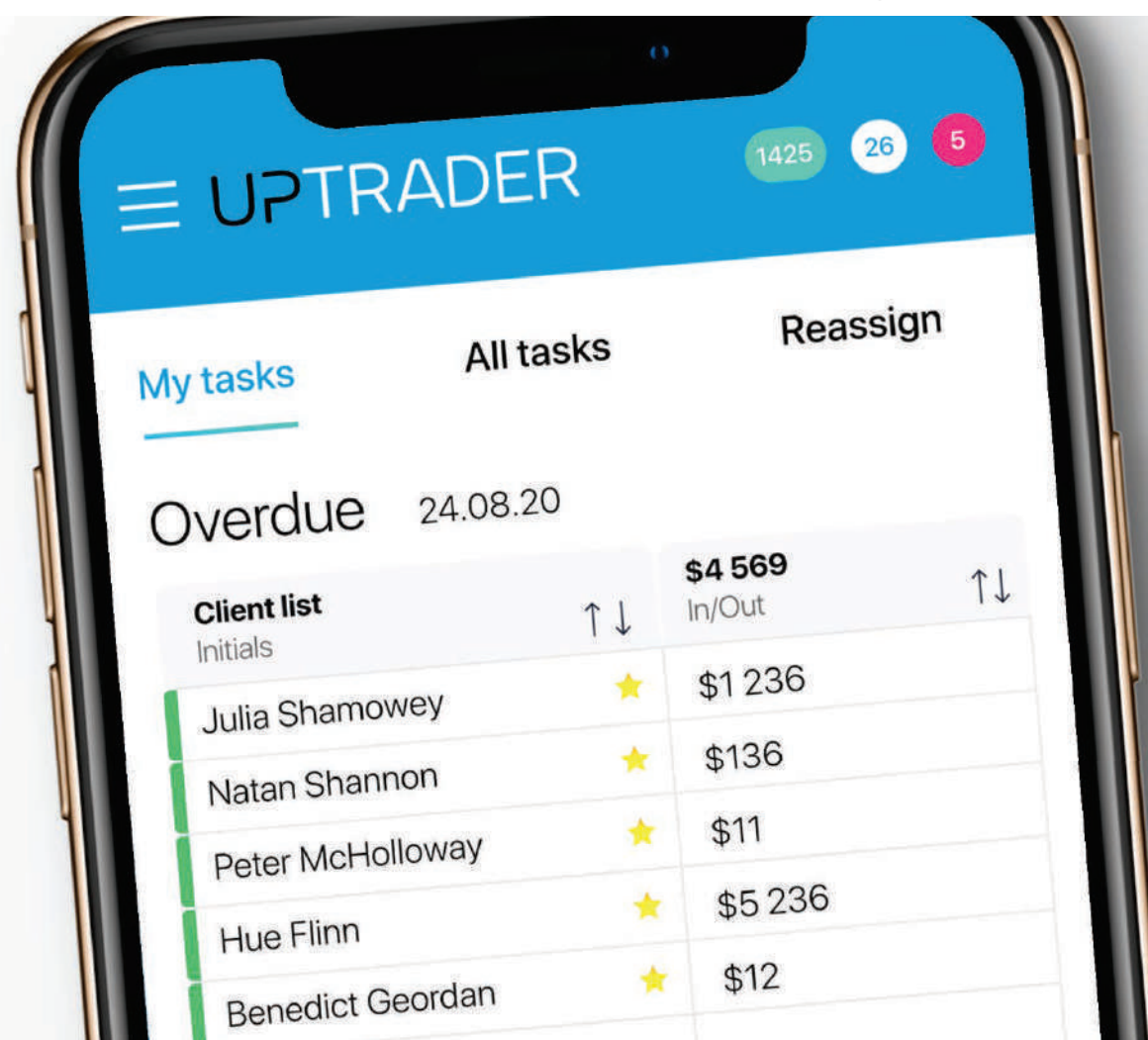
You can distribute clients from different countries with different deposit amounts to different managers or partners.

**Make service different for small and big clients!**

## Managers access setting

- Can your managers give personal bonuses to clients or not?
- Must they approve withdrawals or not?
- Can they see partners' reports or not?

**You decide!**



# SALES MODULE



## Admin

Manage your sales department efficiently!

- **Analyze the work of sales department**

Use visual charts on dashboards

- **Planned deposits**

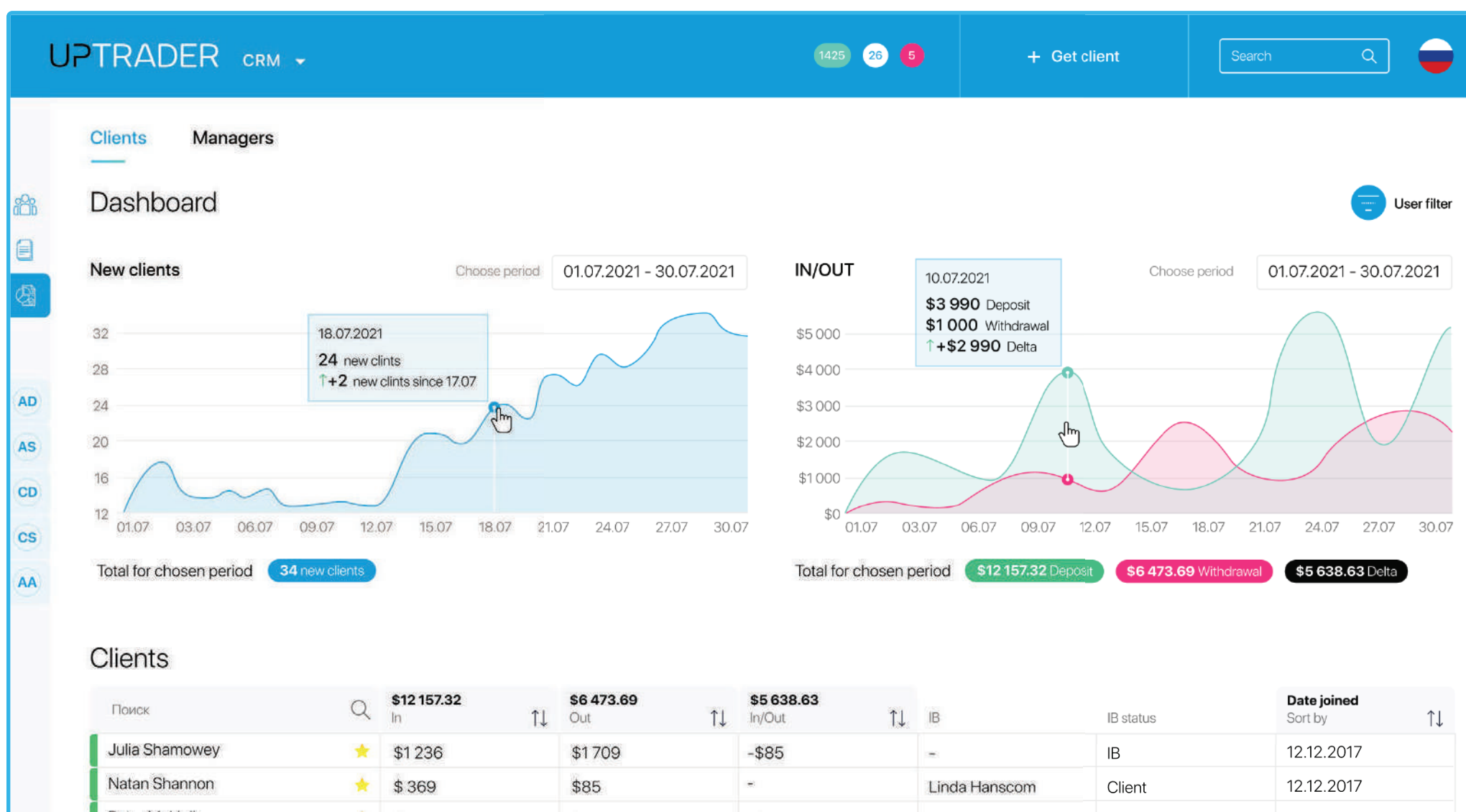
This feature helps management to see a clear picture of the possibilities and then, at the end of the month, to estimate whether the goals have been met or not.

- **Percentage commissions**

Motivate your sales team by individual commissions

- **Logging**

We let you keep all client history, like deposit/trade history, conversation threads with the support team, historical personal information like phone numbers, emails, addresses, documents etc.





# SALES MODULE



## Sales manager

UPTRADER			
1425		26	5
My tasks All tasks Reassign			
Overdue		24.08.20	
Client list		\$4 569	
Initials	↑ ↓	In/Out	↑ ↓
Julia Shamowey	★	\$1 236	
Natan Shannon	★	\$136	
Peter McHolloway	★	\$11	
Hue Flinn	★	\$5 236	
Benedict Geordan	★	\$12	
Cristopher Dorian		-	
Linda Hanscom		-	
Dean Russel		\$236	
Today		25.08.20	

### Quick calls

It lets a manager call from the main list of clients. This important little thing saves your manager a bit of their precious time, it means that they will work quicker.

### Retention of old conversations

It helps any manager to find out how to speak with clients and what to expect from them.

### Deposit attempts

System creates a task for a manager when a client attempts to make a deposit.

Managers can see all key marketing stuff like UTM, special offer, registration page on a client's profile. It helps them figure out why a client is here and what to sell him.

### Manual bonuses

To make a successful sale right away a manager should have a certain freedom in their actions. So a manager can offer individual bonuses just for certain clients to help them make decisions right away.

### Estimate of lead quality

Managers can mark clients interested or not. It helps not spend too much time with a not motivated client in the future.

### Postponing tasks

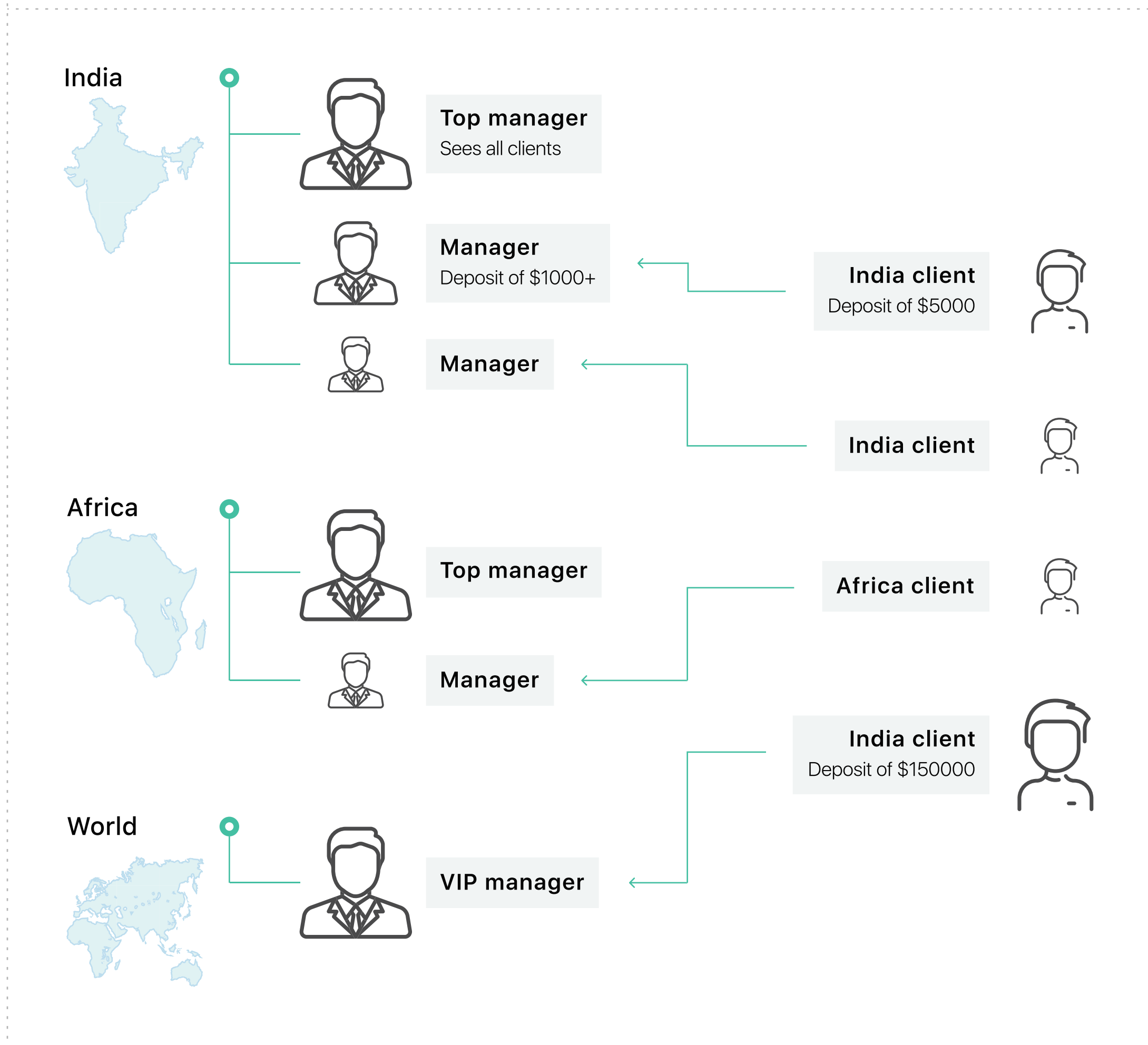
It's pretty difficult to keep all tasks in mind. So managers can postpone some tasks if they don't have enough time to do it now, or they plan future calls with clients.

### Planned deposits

This feature helps to achieve goals.

# SALES MODULE

- **Distribute clients to managers**  
Depending on which regions they come from, from which partners.
- **Build a hierarchy of managers**  
For example, a head office in a region is run by a top manager who sees all clients and partners. There are partner offices under it, and local managers who see clients only from their level and below.
- **Assign managers according to the status of your clients**  
VIP, newbie, and so on.





	Self-Service Plan	Small Business Plan	Enterprise Plan
Price (monthly)	\$1000	\$1500	\$2500
FEATURE PACKS			
Invest service	Not available	\$1000/month per MT server	\$1000/month per MT server
Sales automation module	Not available	Not available	Not available
Bonus module	\$200/month	Included	Included
Statuses module	\$200/month	Included	Included
Advanced IB features	Not available	\$300/month	Included
Full White-Label (remove UpTrader branding from staff-only interfaces)	Not available	Not available	Included
SUPPORT			
Guided setup and onboarding with UpTrader experts	\$500	Included	Included
Support	Email support 24h response time	Personal support via messengers (WhatsApp, Telegram, Skype)	Personal messenger & phone support
SLA	None	99% uptime guarantee	99,9% uptime guarantee x10 credits in case of downtime
ADDITIONAL CUSTOMIZATION			
PSP Integration	\$200 per PSP	\$200 per PSP	\$200 per PSP 1 PSP integration included each month
Non-standard CRM Customization	\$30/hour	\$30/hour	\$30/hour 20 hours included each month

# UPTRADER

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Get started with your brokerage company today!



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<https://uptrader.io>

Vasily Alexeev, CEO

