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 Upradercients

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 managment 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

General

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

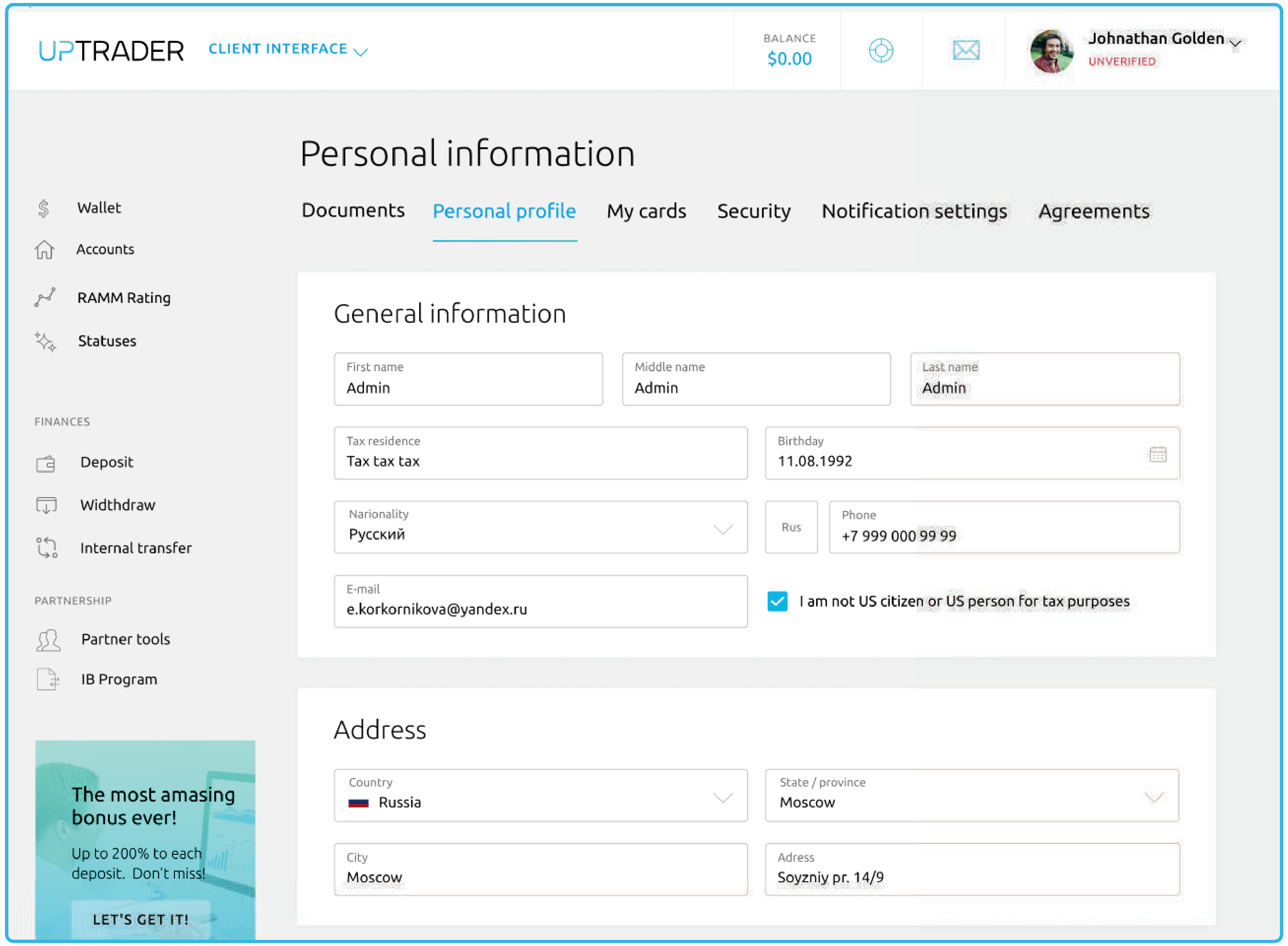
12 | Contacts

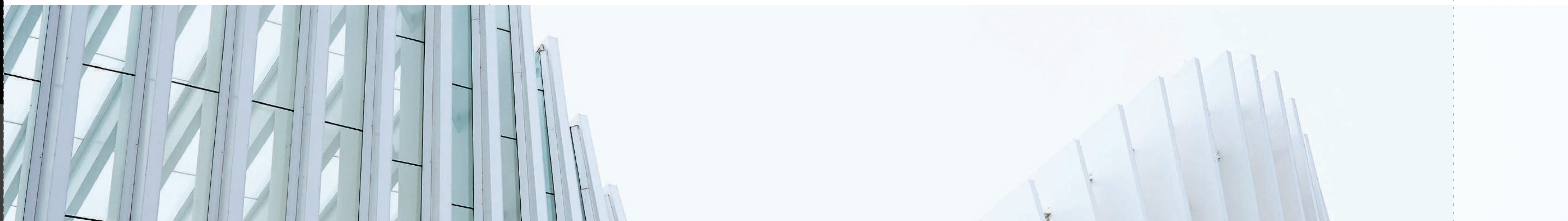
Client

REGISTRATION /KYC

Client/Partner

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





Back office

REGISTRATION /KYC

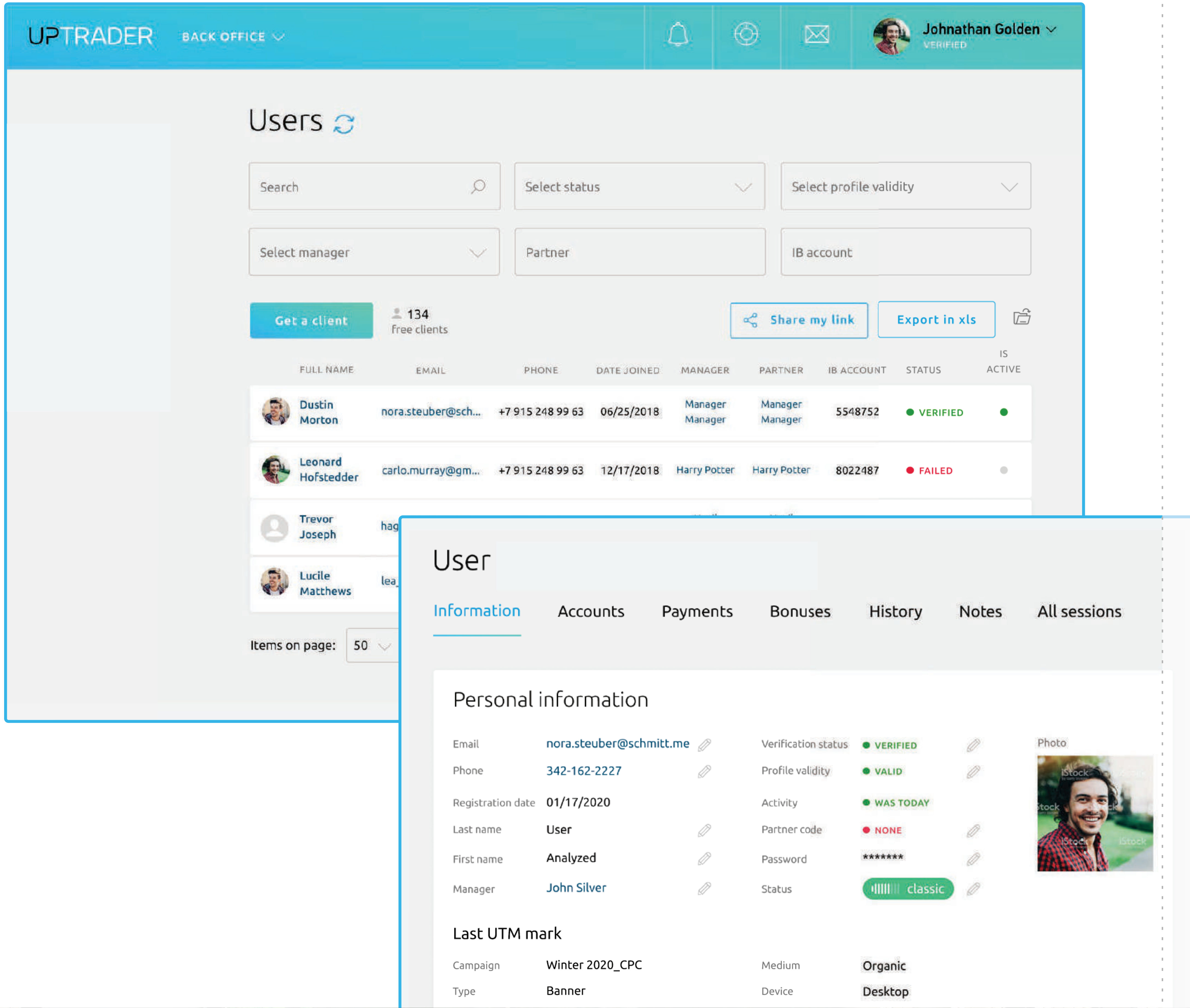
Back office

- **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.



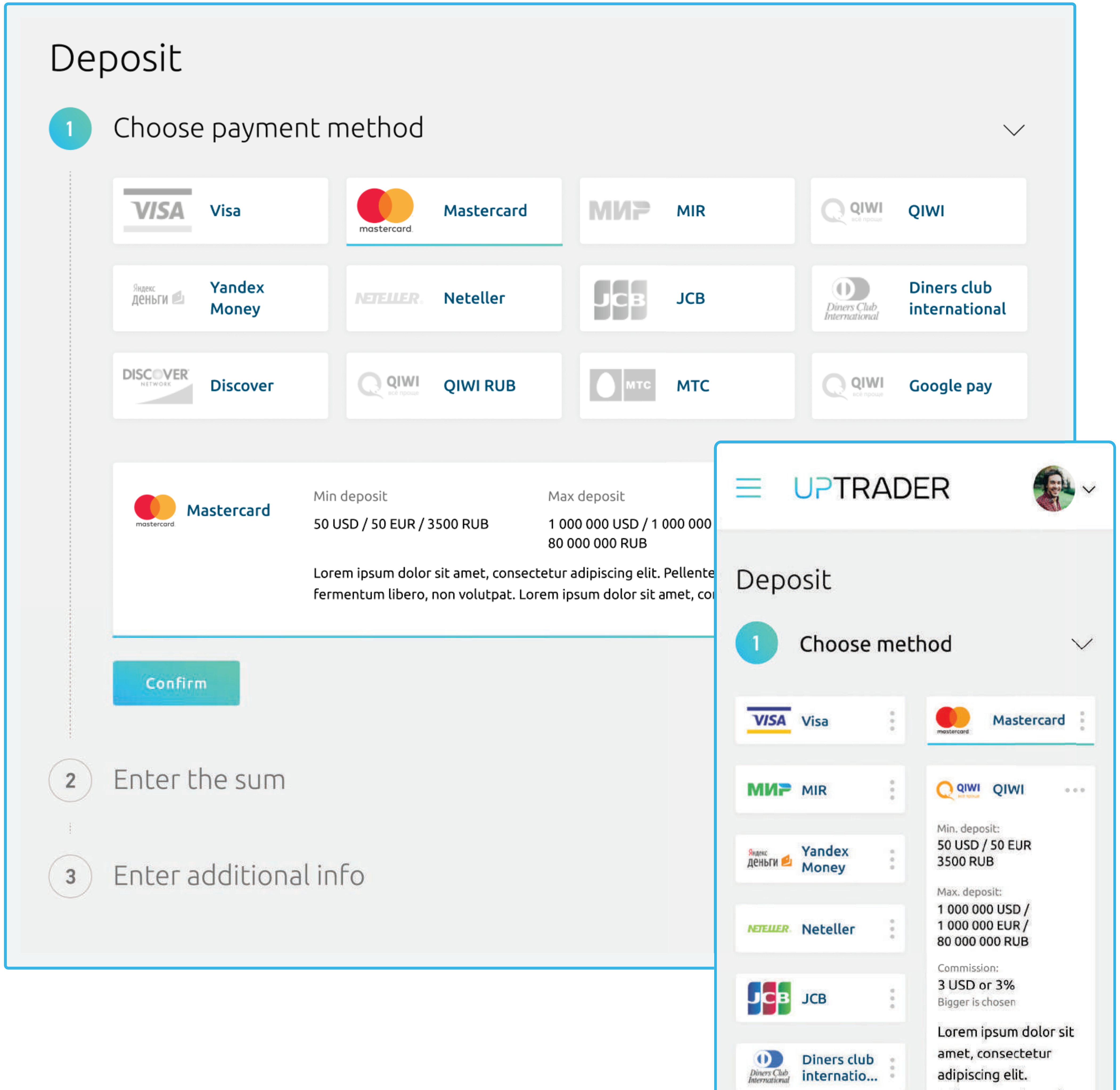
Client

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.



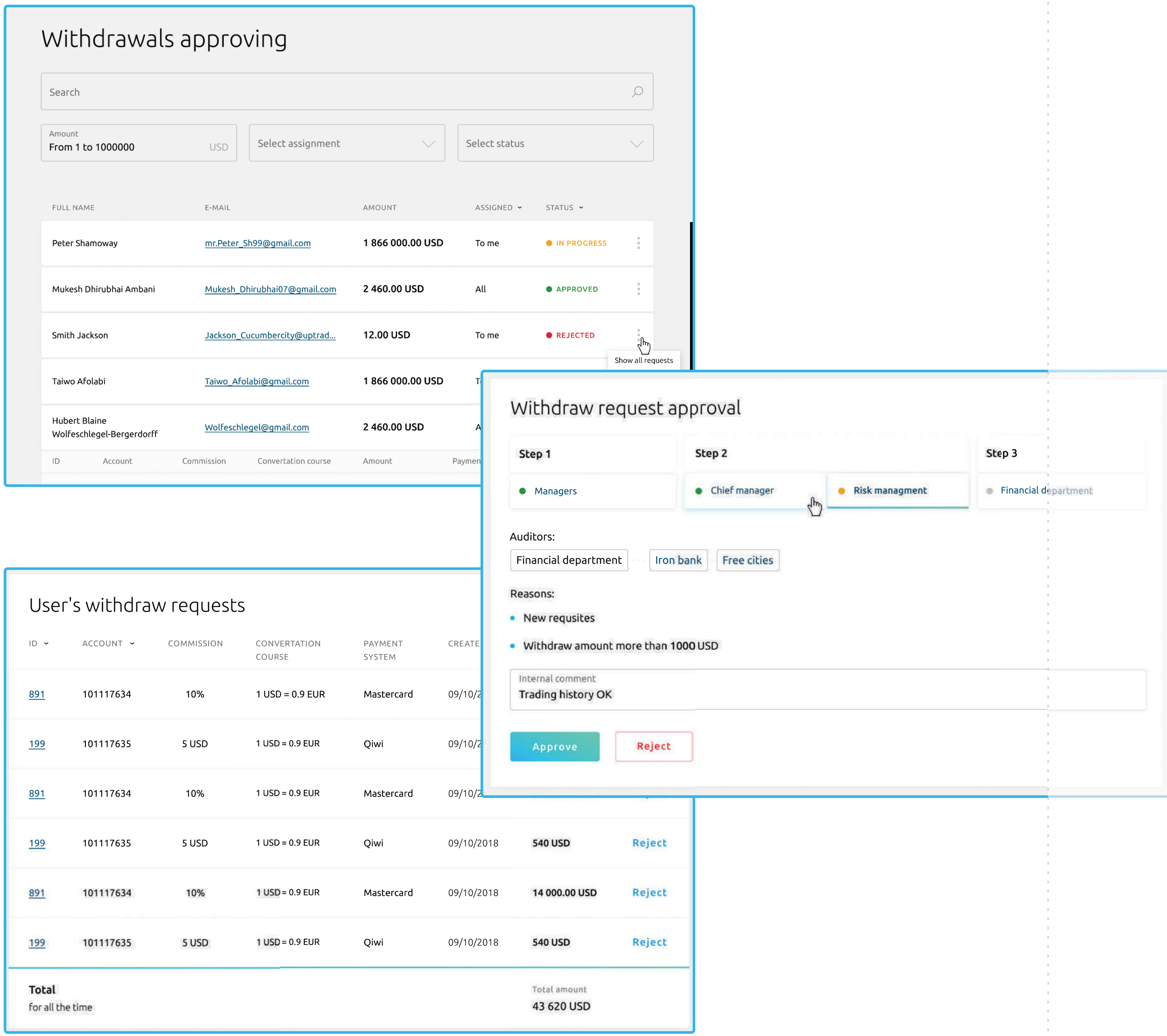
Back office

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.



Partner

DEPOSIT/ WITHDRAWAL/ WALLET

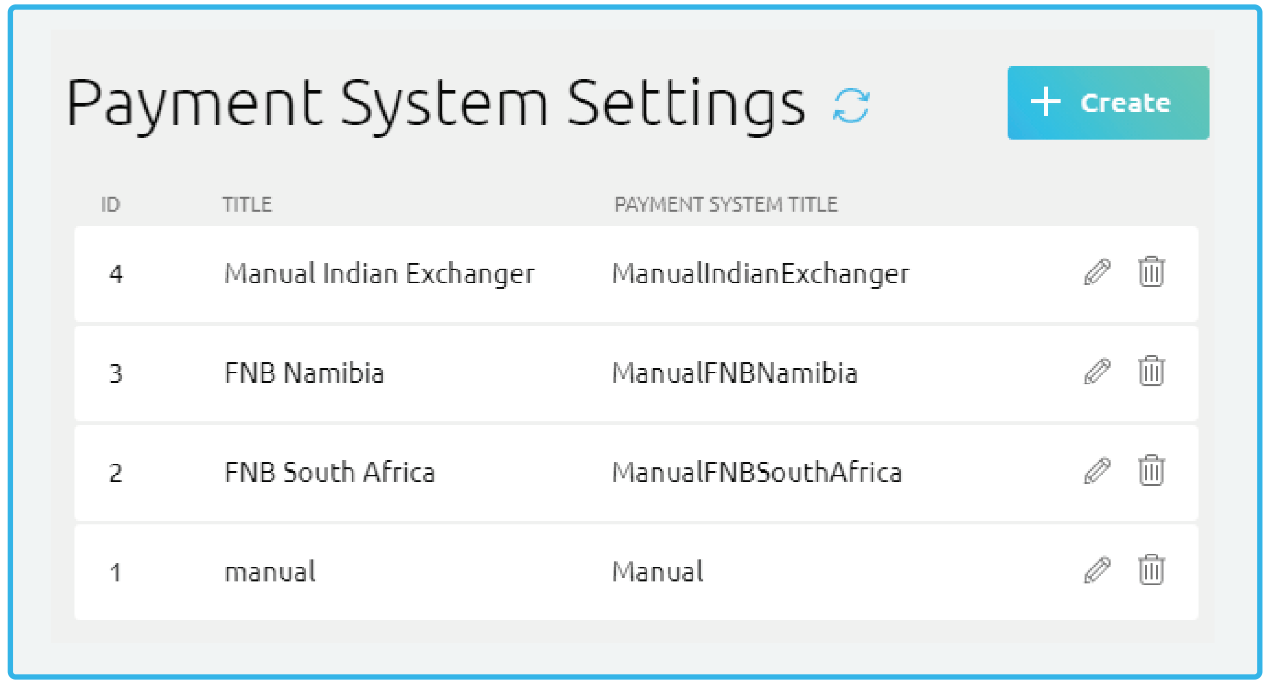
Partner
Can see all client money in reports

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

Admin

DEPOSIT/ WITHDRAWAL/ WALLET

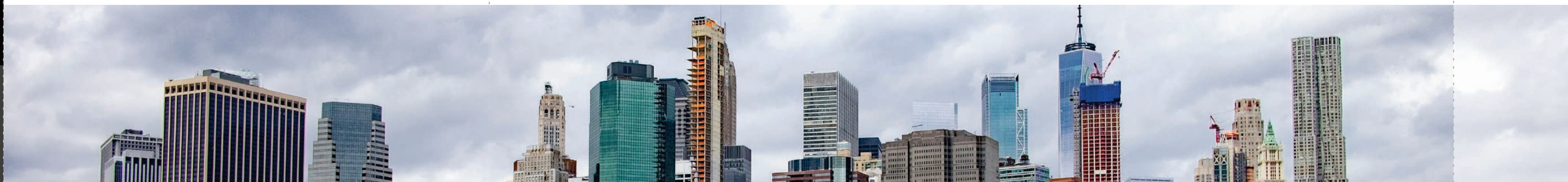
Admin
Adding new payment methods


Payment System Settings

Create

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

mastercard VISA bitcoin tether NETELLER Skrill

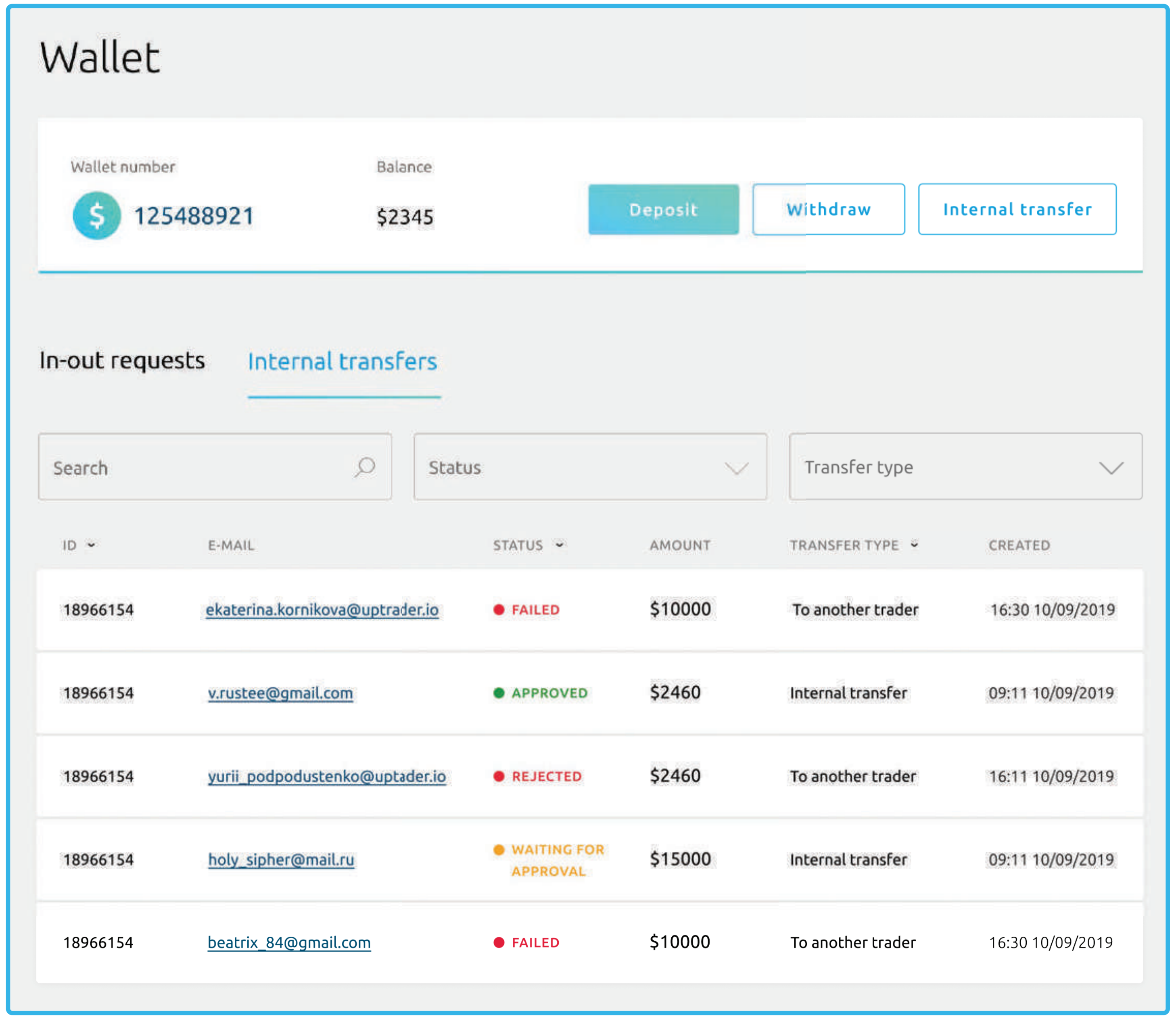


WALLETS

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.



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.

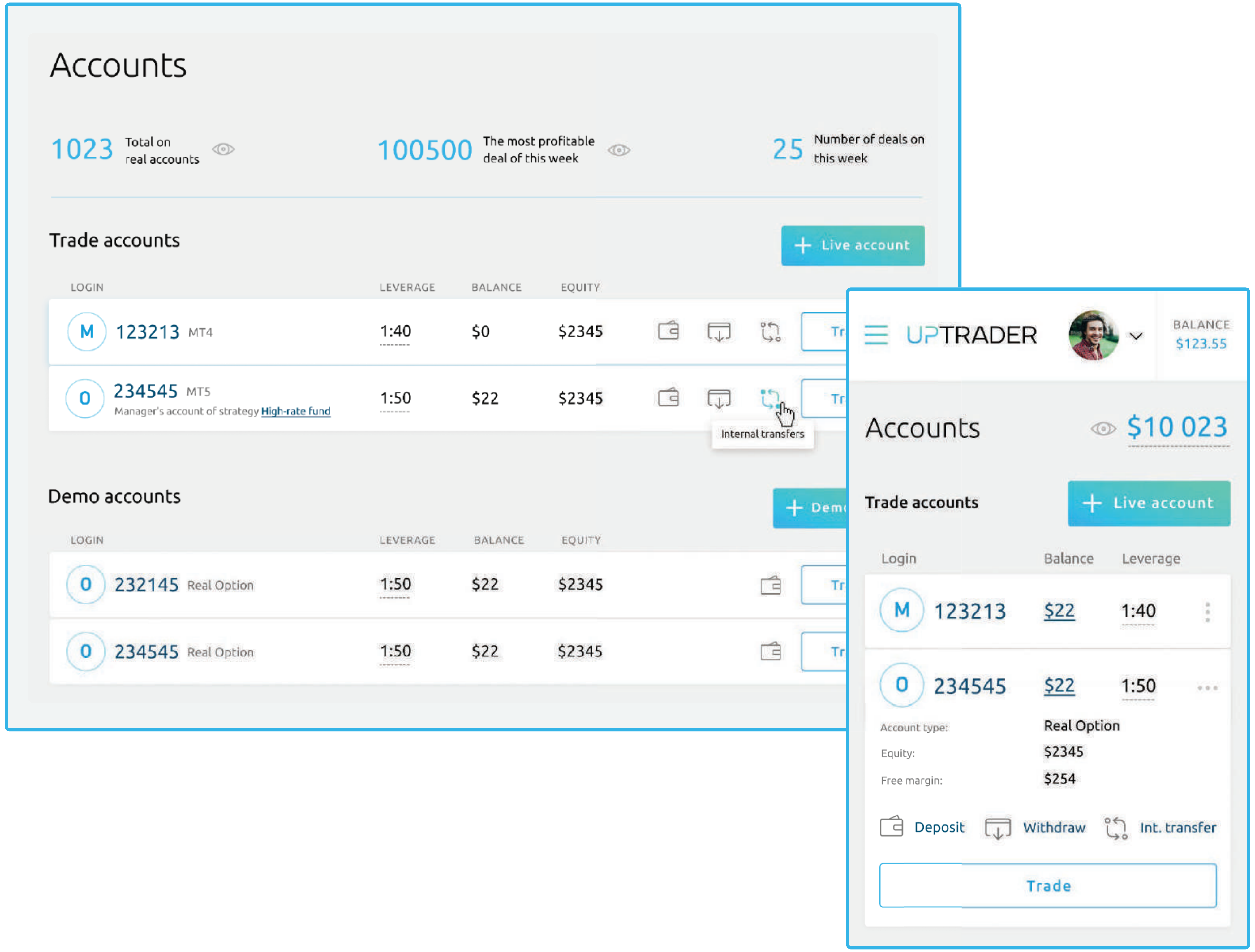
Client

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



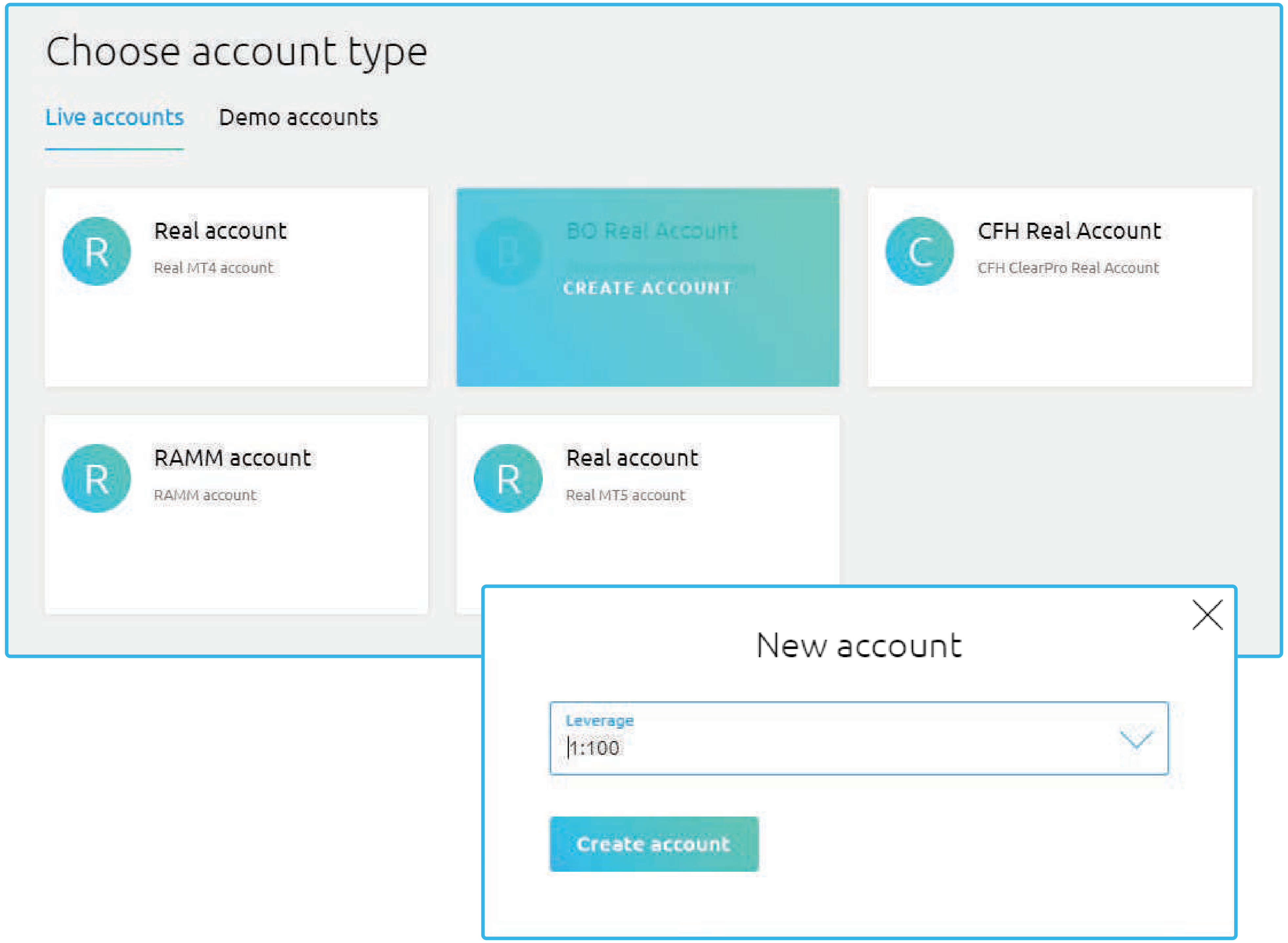
Client

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.



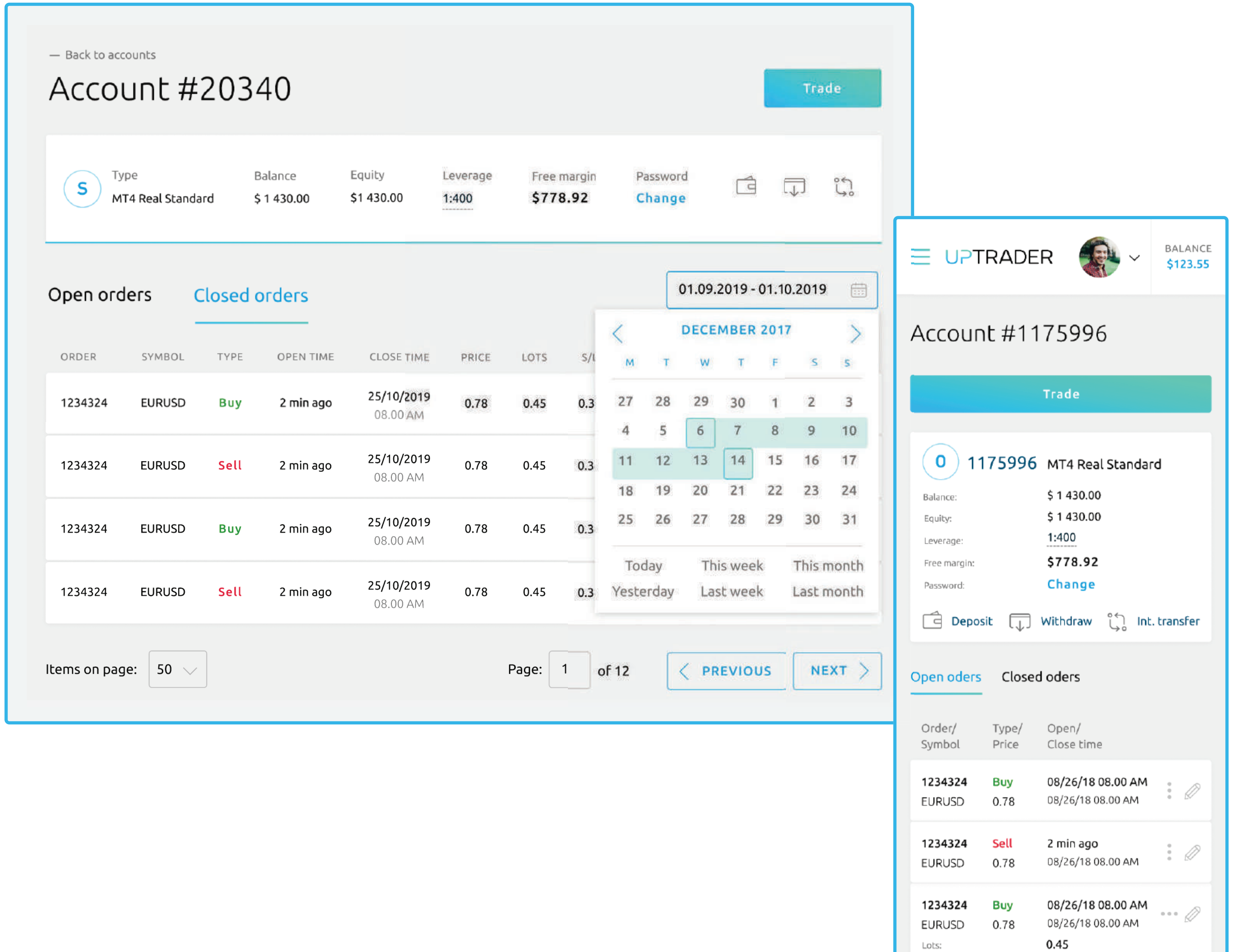
Client

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



Admin

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**

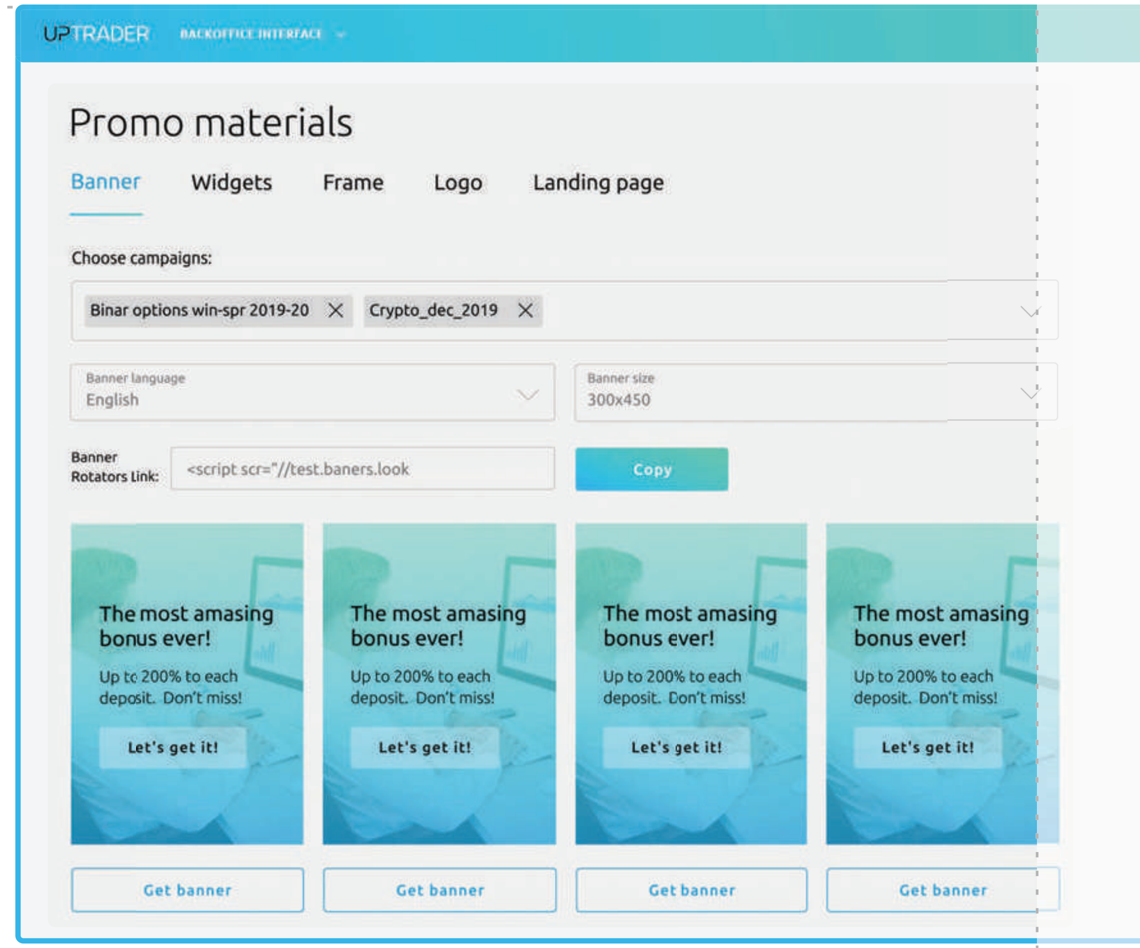
  Your partners can see all of their clients, all trading details, their money and their activity.

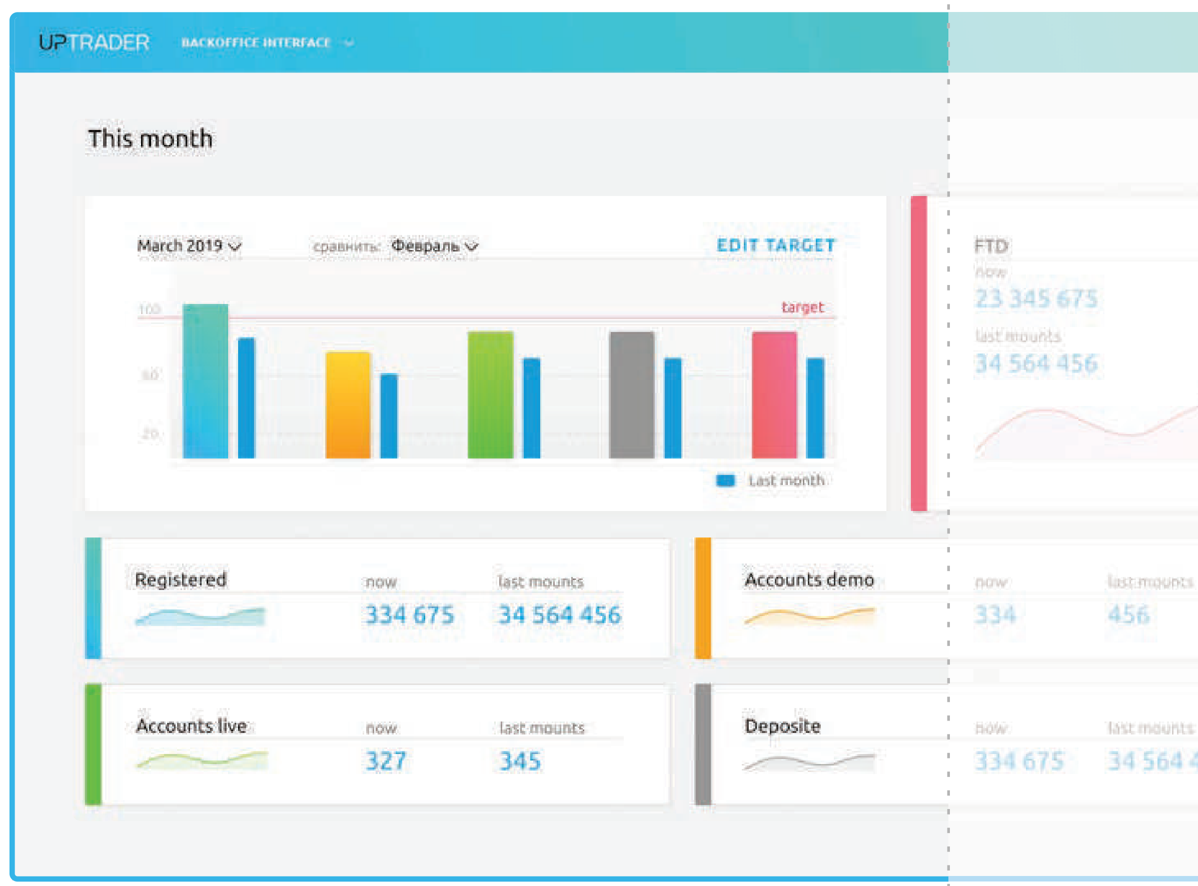
- **Dashboard with charts**

  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**

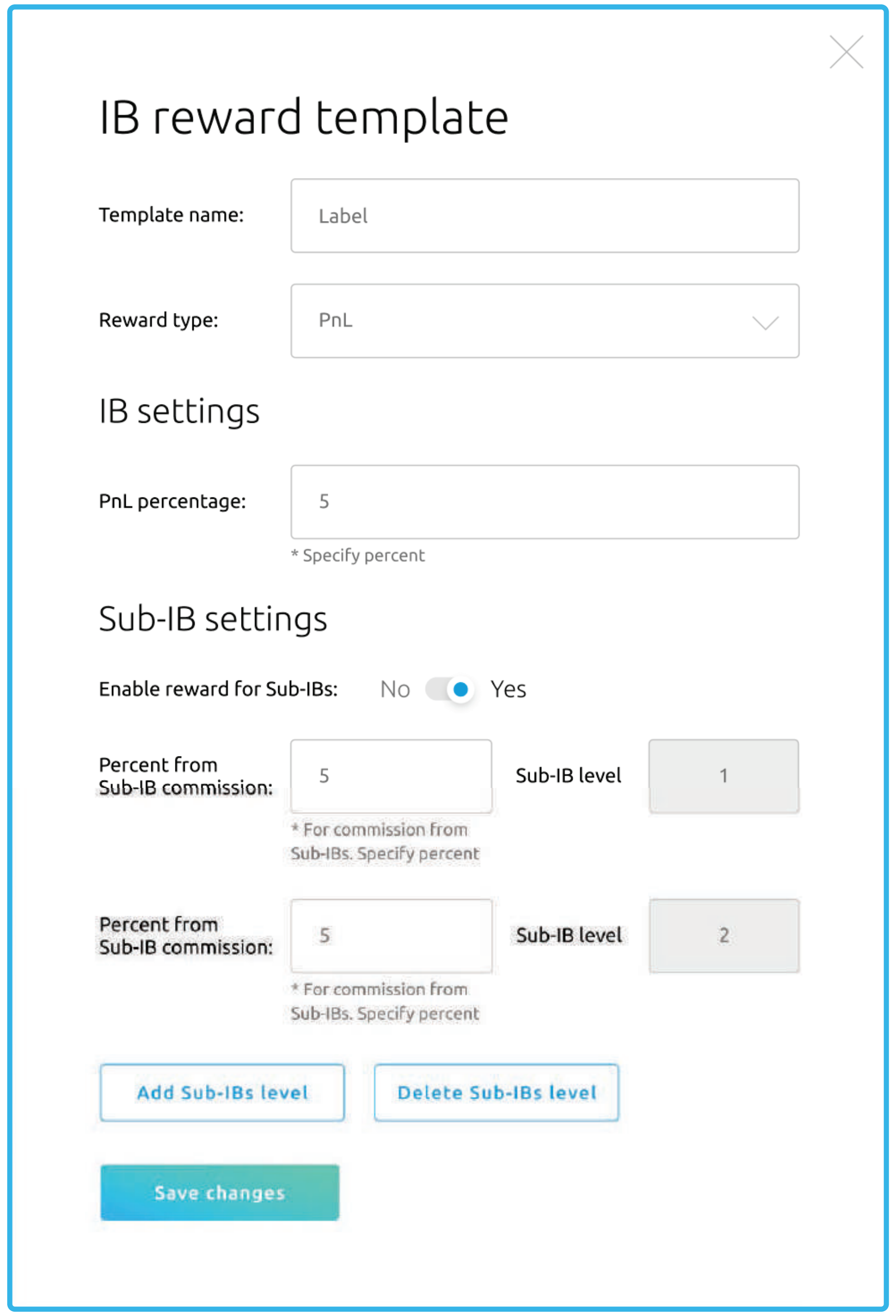
  Get reports about every partner as often as you want. Be aware of all events.

- **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



UP

Admin

PARTNERS

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**

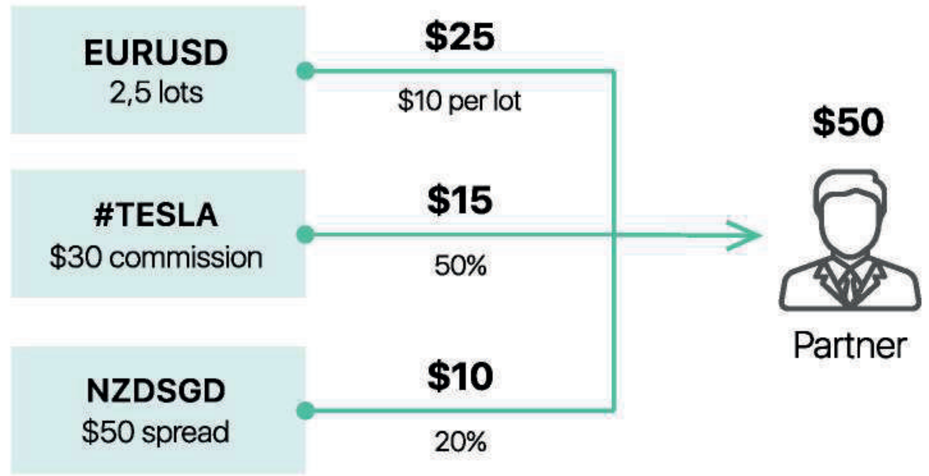
  It's all on you what kind of reports your partners can get.

General

PARTNERS

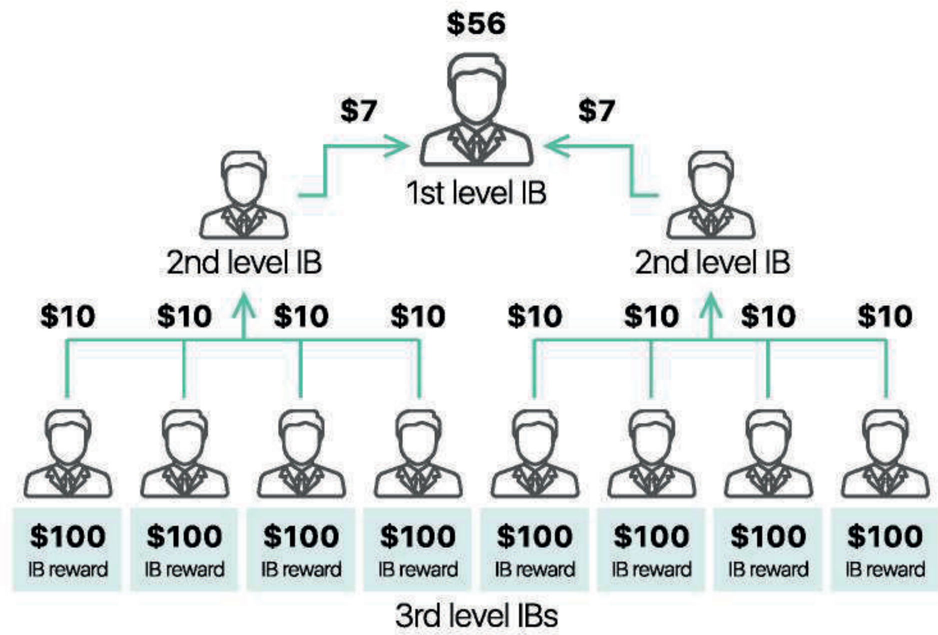
Partnership rewards

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.



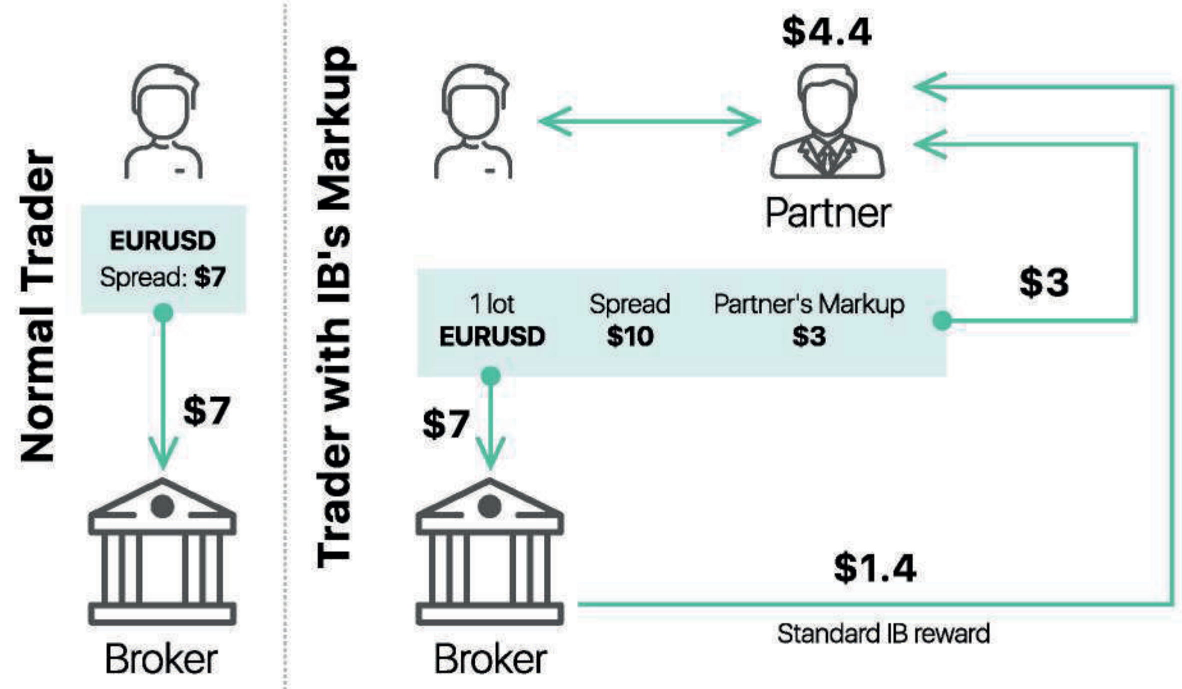
Multilevel partnership

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

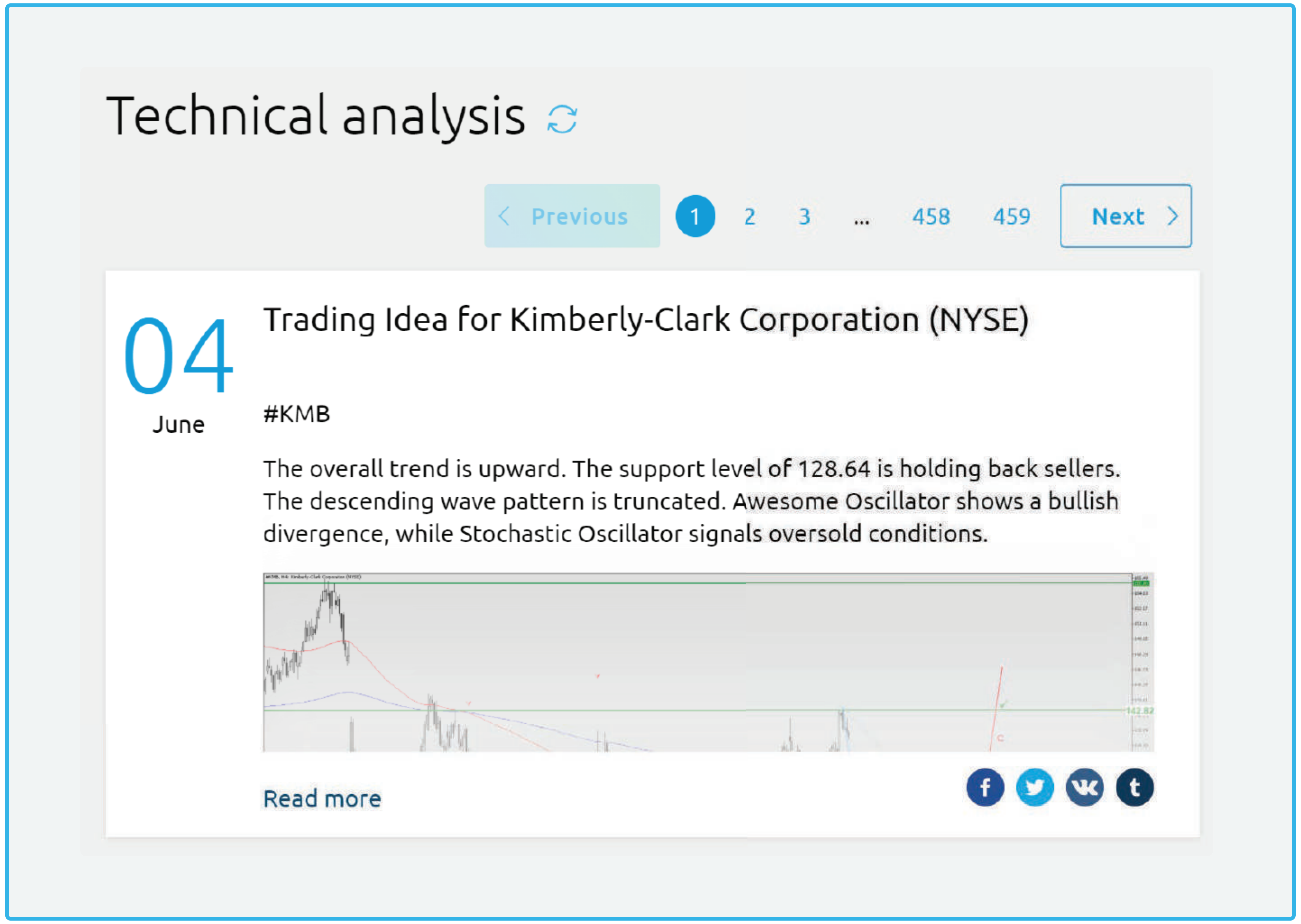
Client

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!



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

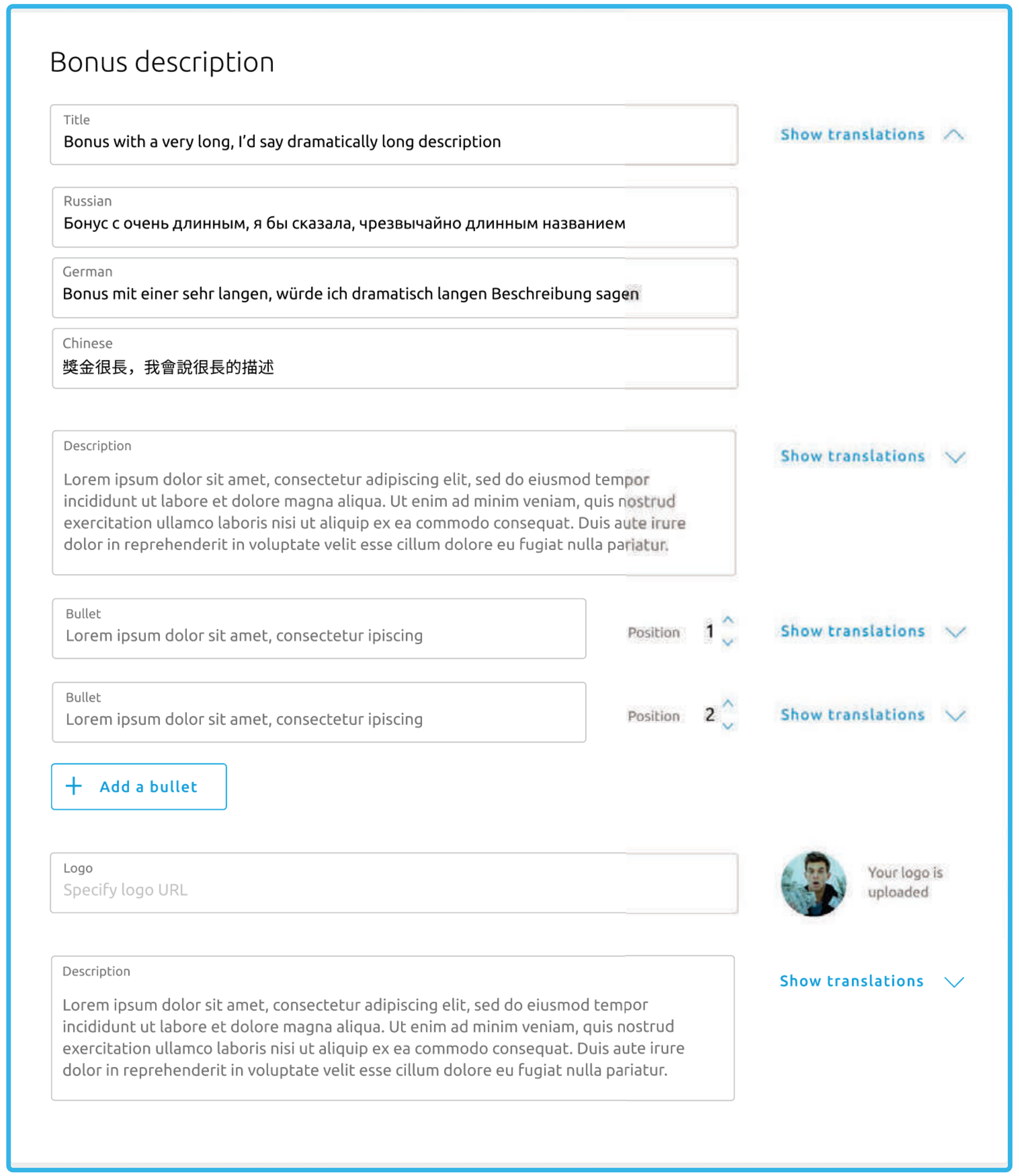
- **Allow or disable bonuses**
- **Decide how bonuses are deposited:**

  Balance - depositing user balance

  Credit - Depositing user credit.

Manage general settings

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



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**

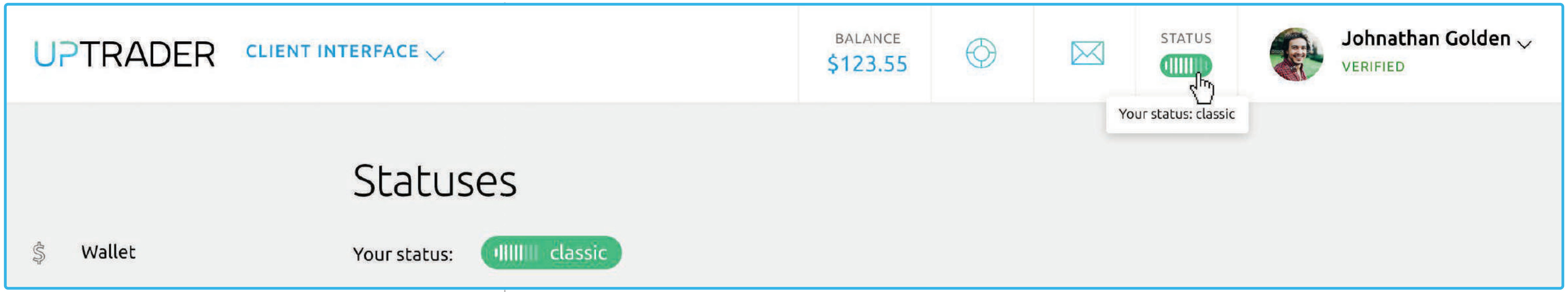
Profi

- All bonuses
- Personal manager

Client
Deposit **$1000**

VIP

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



Back office | Admin

STATUSES

Admin/Back office

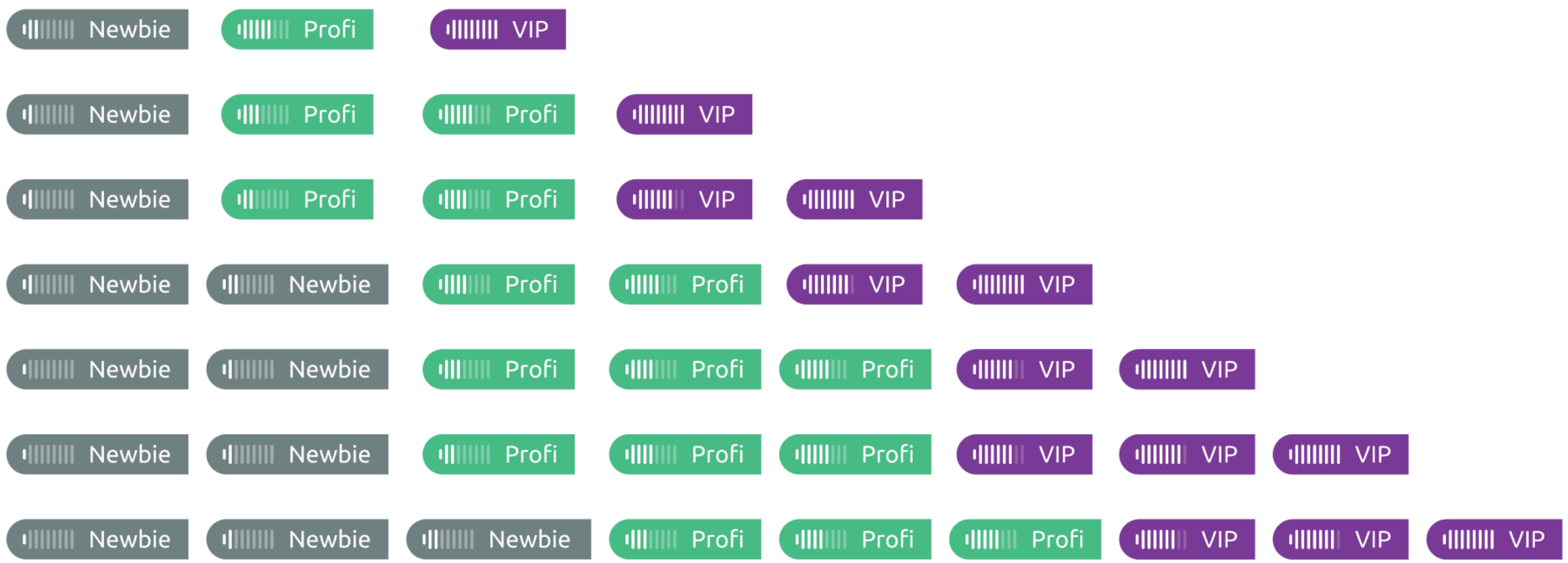
- Setting up any types of statuses. For example:

> ***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



Admin

TRADING PLATFORMS

Admin

On each platform we support:

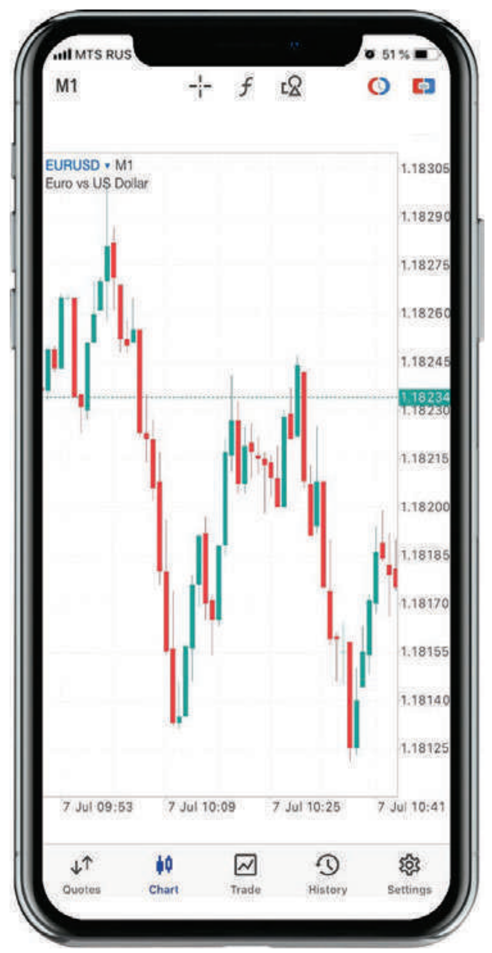
- Opening new trading accounts
- Deposits and withdrawals
- Viewing trading history and balance operations
- IB calculations and reports
- Bonuses
- Blocking and unblocking accounts

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:

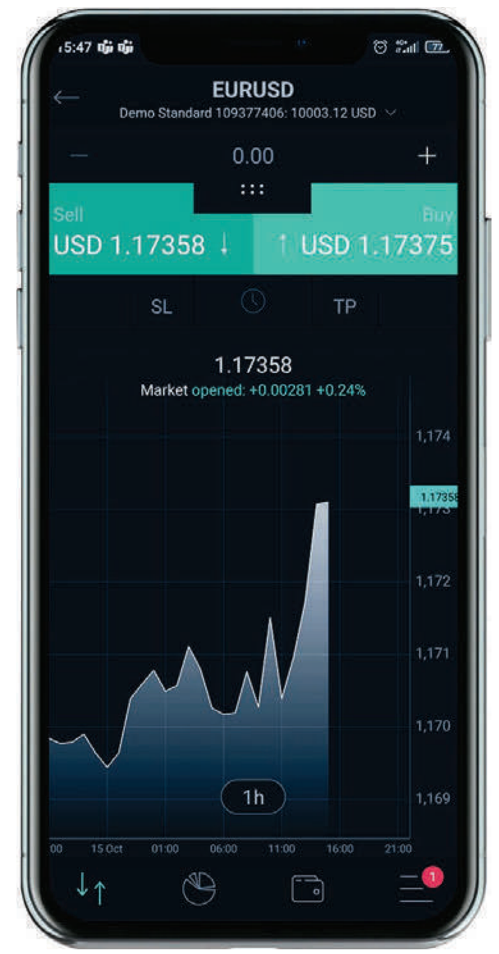
MetaTrader 4

MetaTrader 5



Finalto (CFH) ClearPro

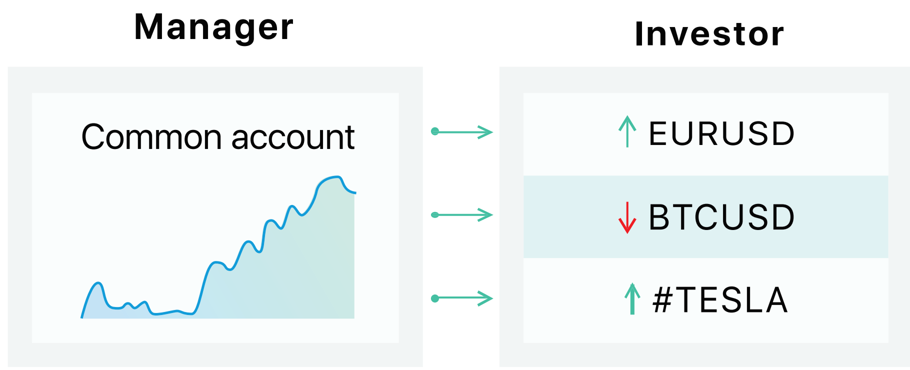
Any other platform can be added on demand



General

INVESTMENT SERVICE

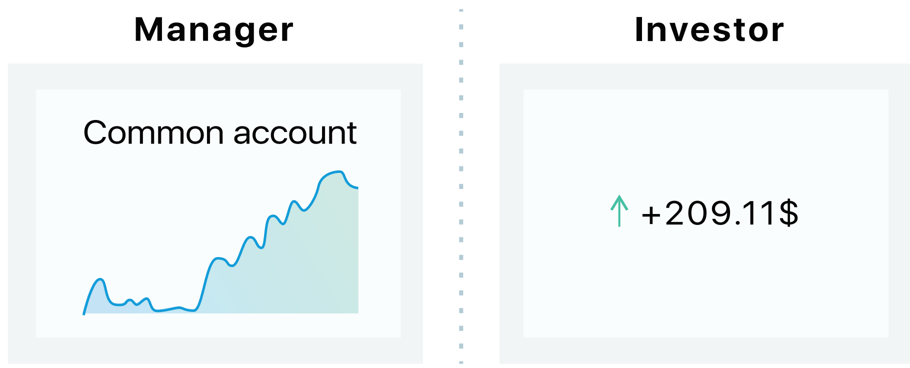
UpTrader Invest can function as any of these systems. Brokers can choose whatever mode they prefer, or enable all three at the same time.



MAM

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

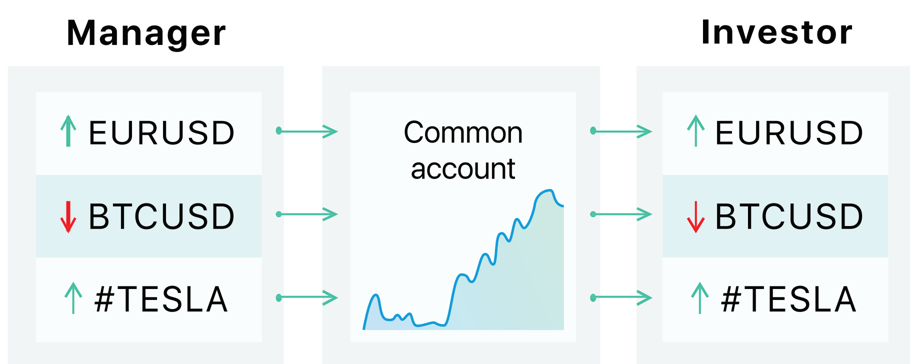
+ Master sees all the funds
+ Investors see individual trades



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

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

SALES MODULE

Admin

Manage your sales department efficiently!

- **Analyze the work of sales department**

  Use visual charts on dashboards

- **Percentage commissions**

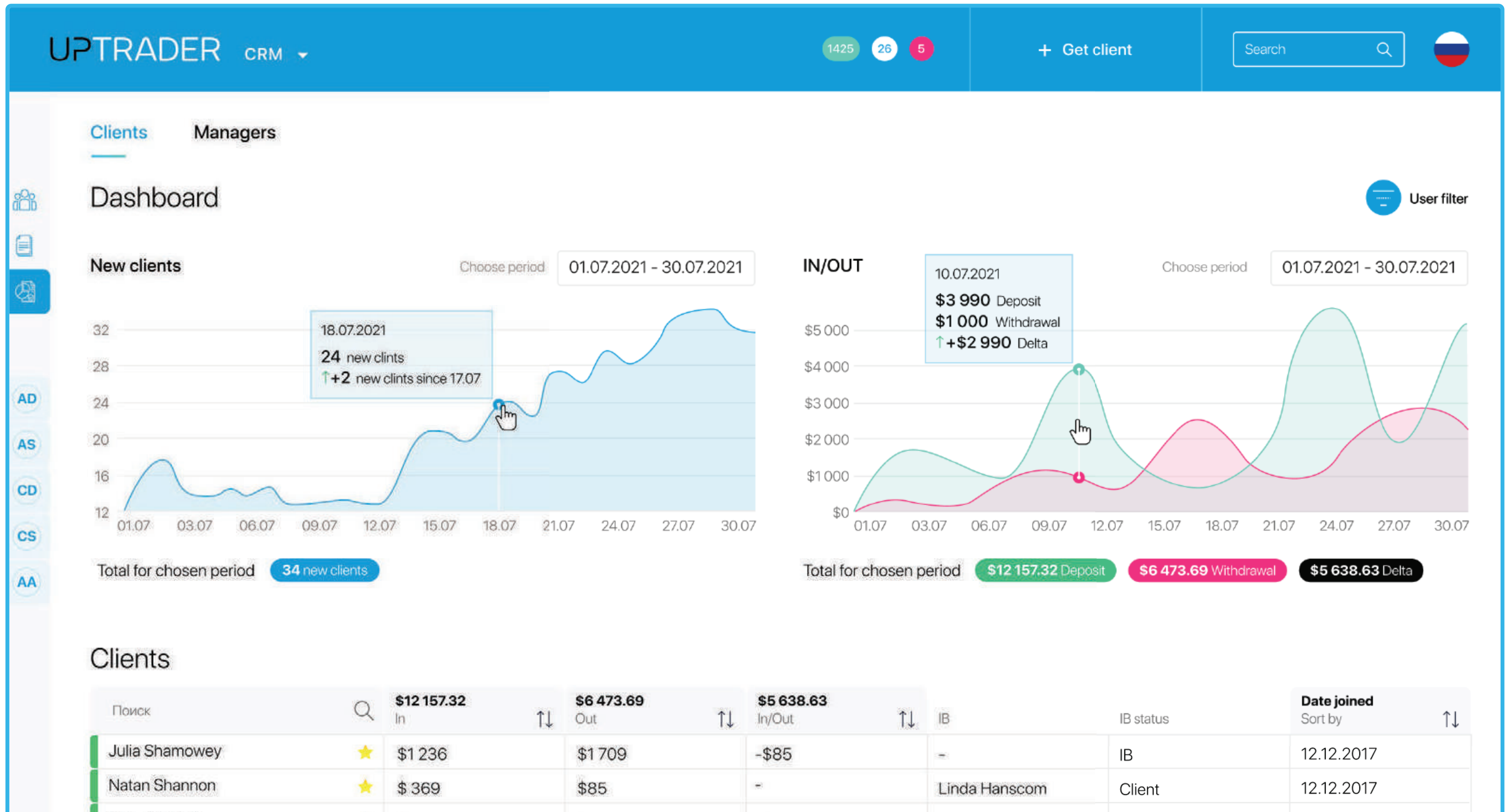
  Motivate your sales team by individual commissions

- **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.

- **Logging**

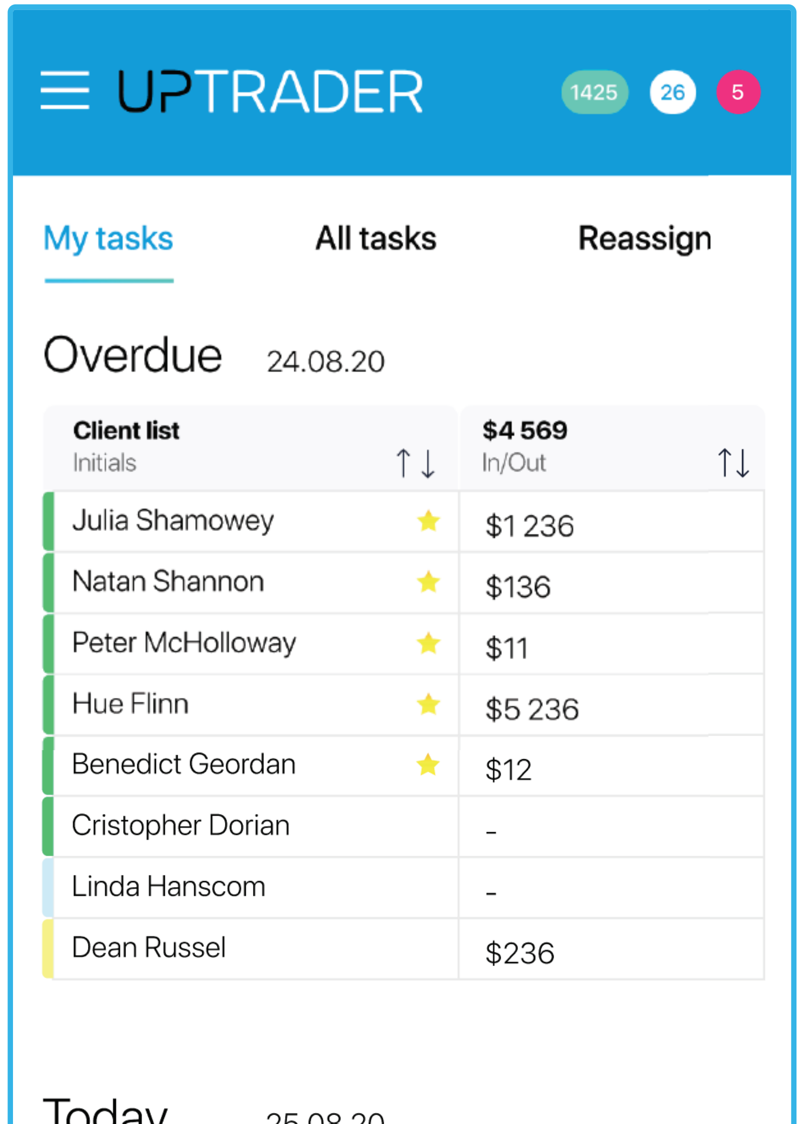
  We let you keep all client history, like deposit/trade history, conversation threads with the support team, historical personal information like phone numbers, emails, addresses, documents etc.



Sales

SALES MODULE

Sales manager



- **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

SALES MODULE

- **Distribute clients to managers**

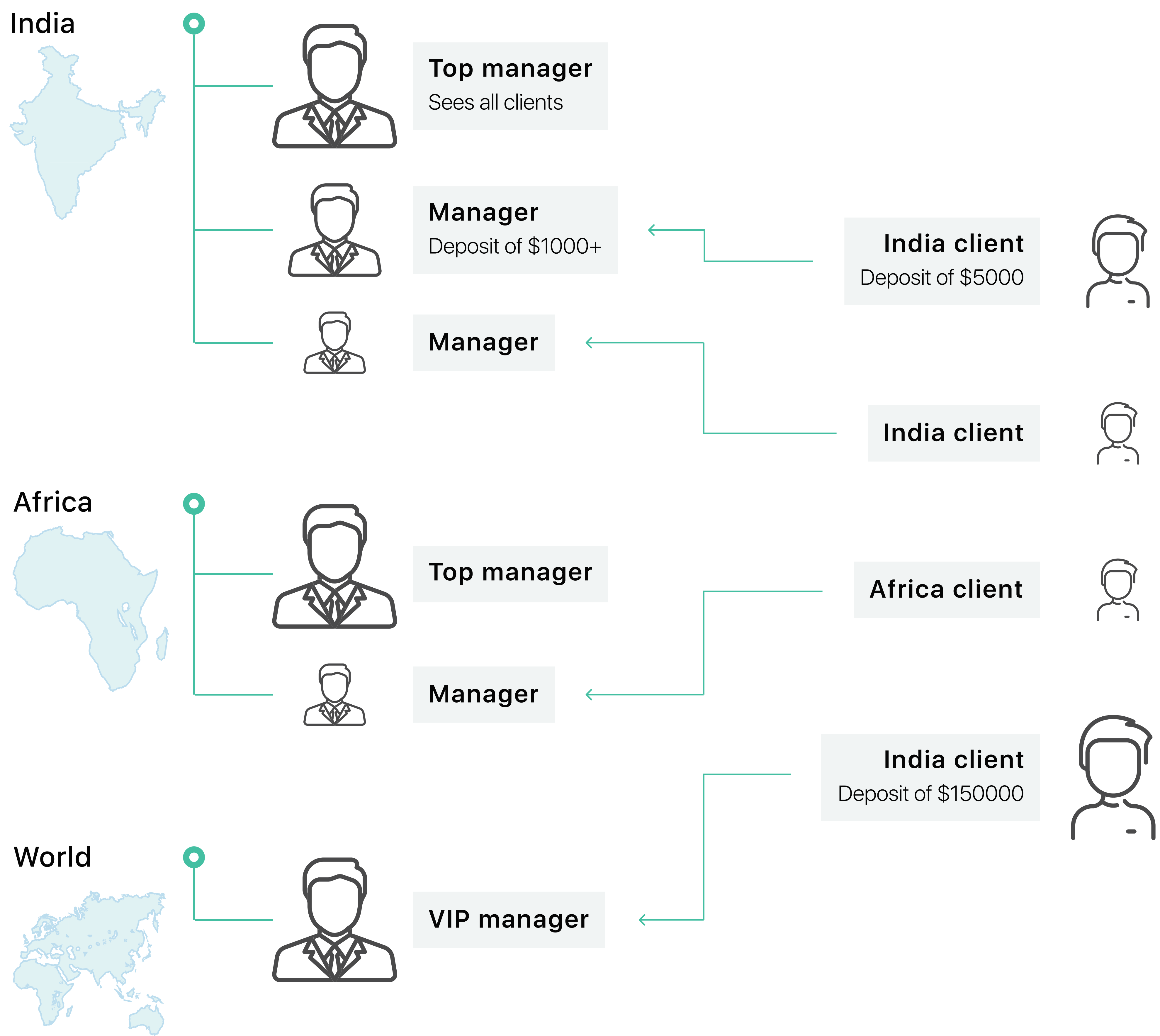
  Depending on which regions they come from, from which partners.

- **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.



PRICES

	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

Get started with your brokerage company today!

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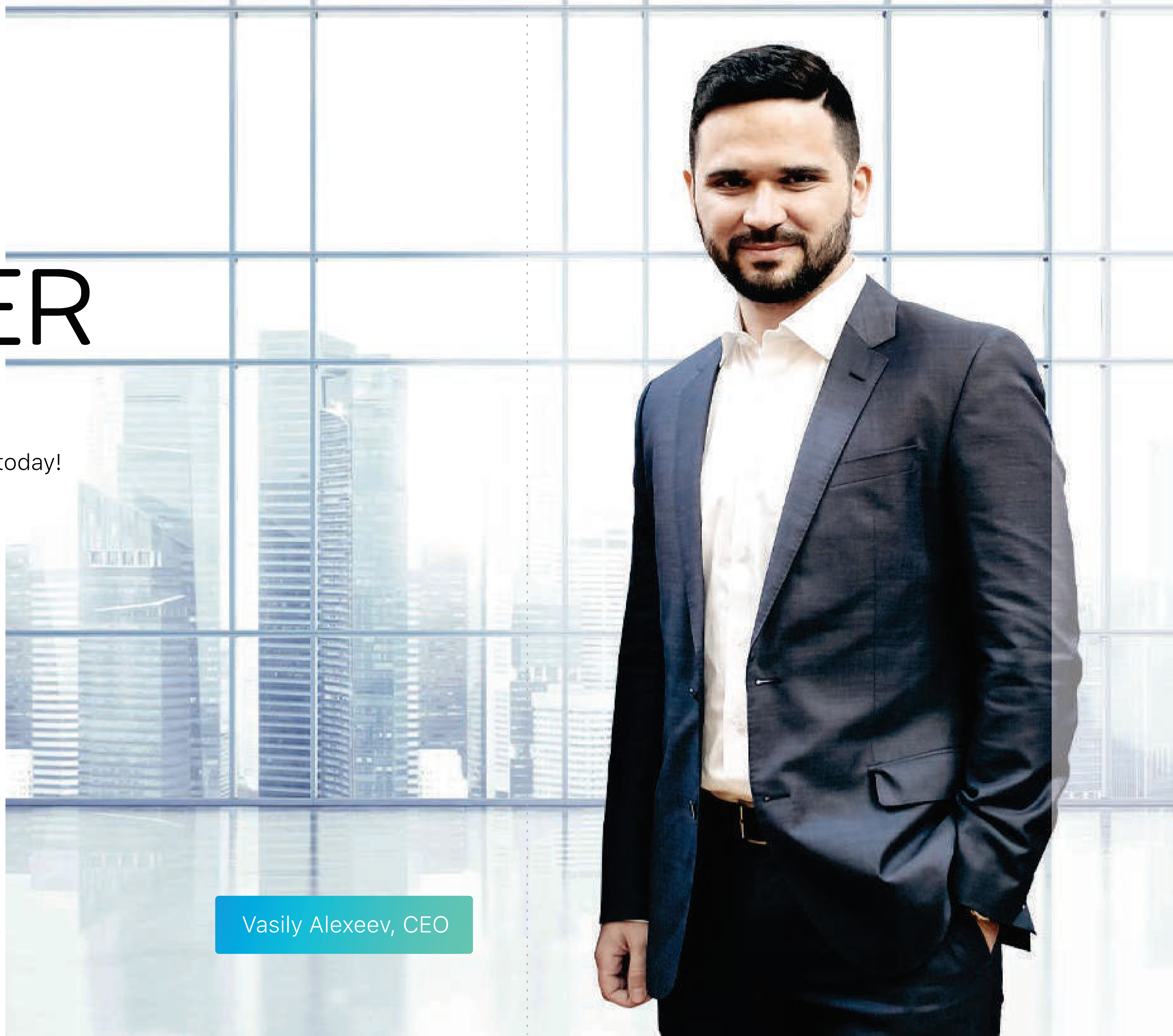
https://uptrader.io



Vasily Alexeev, CEO