

MANUAL FOR SERVICE PROVIDERS

This manual serves as a guide for the Business Development Management (BDM) Department at M4Markets, providing an overview of the roles and responsibilities of all departments. It is intended to help BDM team members identify the appropriate department to contact for specific needs or requests, thereby improving internal communication and operational efficiency.

Reporting Structure

- **Commercial Director: Sam Chaney**
 - All BDMs report to Sam either directly or indirectly.
 - Sam's email: schaney@m4markets.com
- **Commercial Team Coordinator: Adriana Eleftheriou**
 - Also responsible for Customer Support
 - Key intermediary between Sales and other departments
 - Adriana's email: aleleftheriou@m4markets.com

BDM Department Support – Adriana's Responsibilities

Intermediary for Team Requests (BDM's)

- Act as the point of contact for sales teams needs to relevant departments.
- Ensures smooth, cross-departmental communication and resolution of BDM-related tasks

1. Training & Onboarding-BDMS

- Conduct introductory training sessions for new and existing team members on, CRM systems, Loop, Teams, Slack, IB Forms and Live Agent
- Provide ongoing support and guidance for these platforms.

2. Security & Account Support for Client Portal

- Handle password reset requests for clients to ensure seamless access.

3. Client Account Management

- Facilitate and escalate KYC (Know Your Customer) verification by coordinating with the Back Office Team.

4. Travel Coordination

- Organize and coordinate travel arrangements for the Business Development Team to ensure smooth logistics.
- Manage expense reporting and receipt filing for the Finance Team to maintain accurate financial records.

CUSTOMER SUPPORT DEPARTMENT (Handled by Adriana)**1. Customer Assistance & Issue Resolution**

- Respond promptly to customer inquiries via email, chat.
- Troubleshoot technical issues and escalate complex cases to the appropriate teams.
- Provide accurate information about products, services, policies, and procedures.

2. Account & Transaction Support

- Assist customers with account setup, updates, and security concerns.
- Handle transaction (deposits & WDs) inquiries, verification, and login-related issues to MT4-MT5 or Brokeree.

For General Client Replies, any response to a client is handled by:

- Adriana Eleutheriou, aeleftheriou@m4markets.com
- Renata Reis Acauan, rreis@m4markets.com
- Francine Cotoski, fcotoski@m4markets.com
- Leonardo Zem Menegazzo De Oliveira, loliveira@m4markets.com

BACK-OFFICE DEPARTMENT

Responsible Person: Loucas Ioannou

Email: backoffice@m4markets.com

Responsibilities:**1. Client Account Management**

- Handling KYC (Know Your Customer) verification and documentation.
- Reviewing and updating client account information.
- Assisting with account-related queries and modifications.

2. Transaction Processing & Troubleshooting

- Managing withdrawals and deposits, ensuring timely processing.
- Verifying and approving financial transactions in line with company policies.
- Troubleshooting deposit and withdrawal issues, including failed transactions, incorrect details, or delays.
- Coordinating with relevant teams (Finance, Compliance, IT) to resolve transaction-related discrepancies.

3. Security & Account Support

- Handling password reset requests for clients.
- Assisting with account recovery and security updates.
- Ensuring compliance with security protocols for account modifications.

4. Compliance & Verification

- Ensuring all client documentation meets regulatory and internal requirements.
- Conducting periodic reviews to maintain compliance standards.
- Addressing discrepancies and coordinating with the compliance team when necessary.

PARTNERS DEPARTMENT:

Responsible Person: Christos Nikolaou

Emails:

- IB-related: partners@m4markets.com
- CRM & General: cnikolaou@m4markets.com

Responsibilities:

- Handling CRM-related issues and support.
- Managing CRM profiles for new hires and resigned employees.
- Facilitating wallet openings for BDMs to receive their salaries.
- Generating reports upon request.
- Processing IB requests and drafting new IB agreements.
- Calculating IB and BDMs commissions.
- Addressing inquiries from the dealing team regarding group structures and related matters.

PAYMENTS DEPARTMENT

Responsible Person: Argyro Koussiapa

Email: payments@m4markets.com

Responsibilities:

- Submit and handle PSP and bank applications for all group-related entities.
- Monitor and maintain relationships with banking partners, proactively updating them on any changes in the group's structure.
- Communicate with PSPs and banks to address and resolve any queries or issues.

- Troubleshoot PSP-related issues affecting payment processing, analyzing and identifying system problems.
- Take timely action in cases of PSP downtime or unscheduled emergency maintenance.
- Manage amendments to the client area, including updates to logos, limits, and wording.
- Handle chargeback and recall disputes, ensuring compliance with Visa and Mastercard regulations.
- Collaborate with the Development team to integrate new payment providers and improve payment solutions.

IT DEPARTMENT

Responsible Person: Petros Petrou

Email: it@m4markets.com

Responsibilities:

When a new team member is hired the IT is responsible for:

- Set up new service providers, including creating email accounts, Slack and Voiso accounts, setting up email signatures, and assisting with account configuration as needed.
- Provide remote user support, manage workstations, peripherals, and system maintenance.

Moreover, they are also responsible for:

- Manage system updates, root access, and user privileges (admins) for IT systems.
- Oversee inventory, purchases, and stock for IT-related software and hardware.
- Administer user accounts in Active Directory (Local / Azure Cloud) and manage requisitions and terminations.
- Handle software installations, backup of telephone communications, and system security (anti-virus, firewall, VPN).
- Manage communication platforms like Softphone/Hard Phone, 3CX, Voiso, and related services (Slack, Zoom, TeamViewer).
- Oversee Microsoft 365 accounts, Zimbra Admin Console, and LastPass password management.

DEALING DEPARTMENT**Responsible Person: Charalampos Charalambides**Email: dealing@m4markets.com**Responsibilities:**

- Monitor and manage liquidity in our LP counterparties to ensure efficient margins sustained.
- Actively managing risk of the company to mitigate all trading related risks through established procedures
- Manage all trading platforms to ensure smooth operation of daily trading activities
- Manage bridge to ensure smooth operation of daily trading activities
- Assist clients on advanced trading queries/requests on a daily basis
- Work closely with relevant departments to define/optimize company's product, regarding offers, instrument offerings, instrument specifications, IB/partners offerings

HR DEPARTMENT**Responsible Persons: Aliki Karmiotou & Emily Iakovidou**Email: hr@m4markets.com**Responsibilities:**

- Responsible for the full employee lifecycle, from recruitment to ongoing support.
- The team drafts and issues job offer, prepares employment or service agreements, and ensures all necessary documentation is collected, verified, and securely stored.
- Once a candidate is hired, HR facilitates the onboarding process and coordinating with the IT and CRM departments to provide access to internal systems such as email, CRM, and communication tools.
- Manages employee records, monitors annual leave, and handles all HR functions via the BambooHR system.
- In terms of employee support, HR serves as the primary contact for any HR-related inquiries or administrative assistance, ensuring smooth day-to-day operations.
- Payroll management is also part of their responsibilities, ensuring timely and accurate salary processing.
- When a new candidate is ready to be onboarded, an email must be sent to hr@m4markets.com, with the Commercial Director in CC. The email should include the candidate's passport copy, a recent utility bill, proposed monthly salary, starting date, job position, and CV. Upon receipt of this information, HR will issue the official offer and draft the necessary agreement.

MARKETING DEPARTMENT

Responsible Persons: Belinda Guga
Email: marketing@m4markets.com

Responsibilities:

- 1. Brand & Communications**
 - Development and adaptation of branded materials (presentations, brochures, brand identity)
 - Ensuring brand consistency across all communications
 - Creating templates (emails, documents, presentations) in line with brand guidelines
- 2. Sales Support**
 - Preparation of marketing materials for sales needs (flyers, landing pages, decks)
 - Development of custom commercial offers and case studies
 - Support in preparing for expos, summits, and client meetings
- 3. PR & Reputation**
 - Writing and distributing press releases
 - Organizing interviews and publications in media outlets
 - Monitoring and managing media mention and brand image
- 4. Social Media**
 - Managing and growing company accounts across platforms
 - Creating content (copywriting, design, video)
 - Running special formats, contests, and collaborations
- 5. ORM (Online Reputation Management)**
 - Monitoring reviews and mentions online
 - Responding to reviews and comments
 - Neutralizing or removing negative content when needed
- 6. Media Promotion**
 - Launching and optimizing ad campaigns (Google, Meta, YouTube, etc.)
 - Selecting platforms for banner placements, articles, and integrations
 - Analyzing ad channel performance
- 7. Events**
 - Organizing company booths at expos and forums
 - Supporting internal events and client meetups
 - Coordinating team participation in conferences
- 8. CRM & Client Communication**
 - Developing communication workflows for different customer types
 - Analyzing and segmenting client databases
 - Setting up funnels and triggers within the CRM

9. Website & Content

- Maintaining the website and keeping it up to date
- Publishing news, updating texts, visuals, and banners
- Writing and posting blogs, case studies, and articles

10. Email Campaigns

- Creating regular and automated email campaigns
- Designing email templates and writing content
- Segmenting audience and managing campaign delivery

11. Sponsorships & Partnerships

- Selecting relevant sponsorship opportunities
- Preparing materials and managing participation logistics
- Collaborating with partners on co-branded campaigns

12. Promotions & Special Campaigns

- Supporting the creation and launch of promotions
- Developing landing pages, banners, emails, and social media posts
- Analyzing results and improving future campaigns

Instructions for Setting Up and Withdrawing Your Salary

Once onboarded, you will receive an automatic email from our CRM system containing your login details for your CRM account, as well as a second email for your client area account. The client area account is where you can withdraw your salary each month.

To receive your salary, please follow these steps:

1. From the menu toolbar, go to the "Profile Verification" section.
2. Add proof of ID and address to verify your profile.
3. Next, click on "Payment Details" and complete the required information.
4. Finally, click on "Withdraw Funds," select your account, and click "Continue" to proceed.

1. Profile verification by completing below steps

TRADER'S MENU

- Accounts
- Funds
- Profile
- Downloads
- Contest
- Economic Calendar
- Trading Calculator

IB MENU

- Become a Partner

SOCIAL TRADING

- M4Markets Social Trading

EDUCATION

- Download Free eBook

Your profile has not yet been verified

Therefore some functionality may be limited. [Click here to see what exactly is missing](#)

Welcome to M4Markets. You are a few steps away from trading.

Your profile has not yet been verified - therefore some functionality may be limited.
Below is a list of what is required in order to become verified.

Proof of ID	Not Uploaded
Please attach a coloured copy of identification document (Passport, National Identity Card, Driving License or any other document issued by an independent and reliable source that carries your photo). Provided document must be valid and clearly show your Full Name, Date of Birth, Issue/ Expiry date and serial number.	
+ Complete	

Proof of Address	Not Uploaded
Please attach a proof of address (recent utility bill, recent bank or credit card statement, etc). Provided document must be full page, recently issued- within 3 months and clearly display the name, address (no PO Boxes allowed) and the Service provided this document.	
+ Complete	

Economic Profile Details	x
Please complete your economic profile. This is an overview of your e landscape.	
+ Complete	

2. Payment details uploading

TRADER'S MENU

- Accounts
- Funds
- Deposit Funds
- Withdraw Funds
- Transfer Funds
- Transactions History
- Payment Details**
- Profile
- Downloads
- Contest
- Economic Calendar
- Trading Calculator

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[+ Open Demo Account](#) [+ Open Live Account](#) [Deposit Funds](#)

Home / TRADER'S MENU / Funds / Payment Details

Upload Payment Details

I want to upload Select

Uploaded Payment Details

Nothing uploaded

3. Withdrawal request:

M4Markets

TRADER'S MENU

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Home / TRADER'S MENU / Funds / Withdraw Funds

1. INITIAL INFORMATION 2. TRANSFER DETAILS 3. CONFIRMATION

Withdraw From: Select an account

[Continue](#)