FX BACK OFFICE
THE ULTIMATE FOREX CRM

INFORMATION REQUIRED FOR THE **MT5** INSTALLATION

Information required for the MT5 Installation

Server Requirements

1. Access to the server where your data and Clients documents will be stored.

   Server's minimal suggested parameters:

   - OS: Windows server 2016
   - CPU: 2 cores
   - RAM: 4GB
   - DISK: 100GB SSD for System and Database
   - DISK: 200GB SATA for Files
   - DISK: 500GB SATA for Backup

2. In the server mentioned in the Clause 1 above, the following ports have to be opened:
   - Allow port 5985 to be opened for IP: **139.162.132.223**
   - Allow port 3389 to be opened for IP: **139.162.132.223 (RDP access)**
   - Allow TCP ports 139 and 445 and UDP ports 137 and 138 to be opened for IP: will be provided by FX Back Office.
   - Allow the port 3306 from you server to be opened for IP: will be provided by FX Back Office.

3. MySQL Credentials (should be without SSL):
   - Sql Login limited by 32 symbols
   - Sql Password limited by 16 symbols

Domain

4. Sub domain name for the client cabinet (e.g. my. companywebsite.com, secure.companywebsite.com, cabinet.companywebsite.com)

5. SSL certificate which for the sub domain mentioned in the Clause 4

Email

6. Email which will be used by the system to send notifications. We recommend using a no-reply email (e.g. noreply@companywebsite.com, noreply@companywebsite.com)

7. Smtp access to the email mentioned in the clause (6) above. Details should contain the following information:
    - mailer_transport: smtp
    - mailer_host:
    - mailer_port:
    - mailer_encryption:
    - mailer_user:
    - mailer_password:

Trading Platform

8. MTM manager for Demo and Live servers (refer to the Appendix 1 for detailed manager settings):
    - Login
    - Web API Password
    - Server

9. Trading account types. Their names and the groups where accounts should be opened for each name including Demo. For example:
    - Standard: ST-USD-xxxxxx – Default group for Standard accounts in USD
    - Standard: ST-EUR- xxxxxx – Default group for Standard accounts in EUR

10. MT5 Trading Platform link for Desktop and Mobile devices.

Other

11. Company logos:
    - Open new profile / Log in: max 750 pixels
    - Inside CRM and Client's cabinet: max 250*50
    - Small logo: max 50*50
    - Favicon (Icon for a browser tab)

12. The list of all PSPs (only the names) you are going to have including: Bank wire, cash etc. Credentials for those PSPs will be asked later.

13. Questionnaire and Appropriateness test in Doc file (if applicable).

14. List of Prohibited Countries (the countries you don't want receive registrations from).

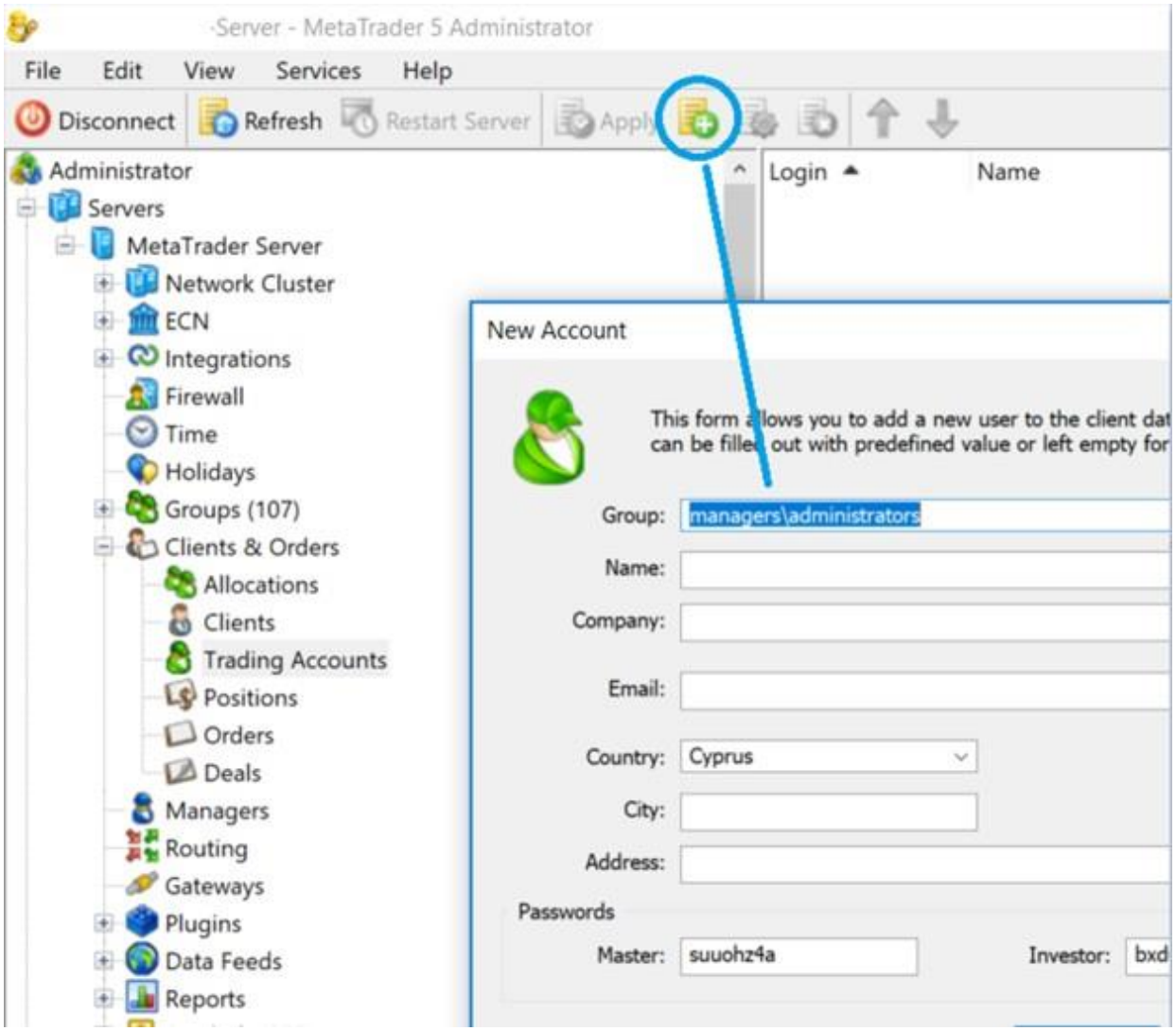
15. Company documents in pdf file, which the Clients will accept at the registration stage.

APPENDIX 1 - MT5 Web API Setup

To get started using the MetaTrader 5 Web API, you must prepare a special account on the trading server. This account will be used to authorize the Web client.

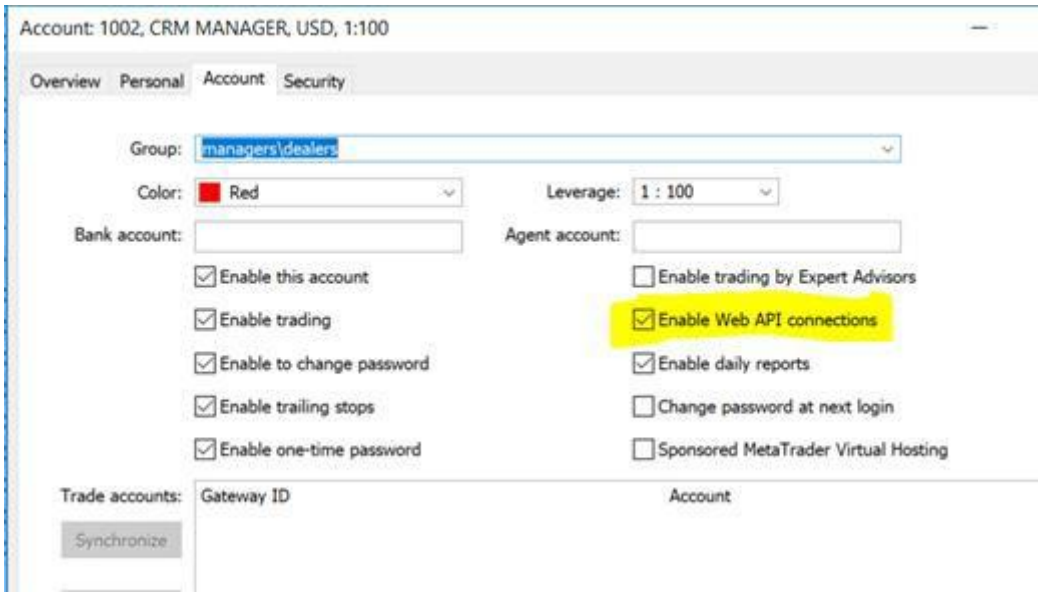
Create an account

To create an account in MetaTrader 5 Administrator, you must go to the appropriate section and execute the command "Add"

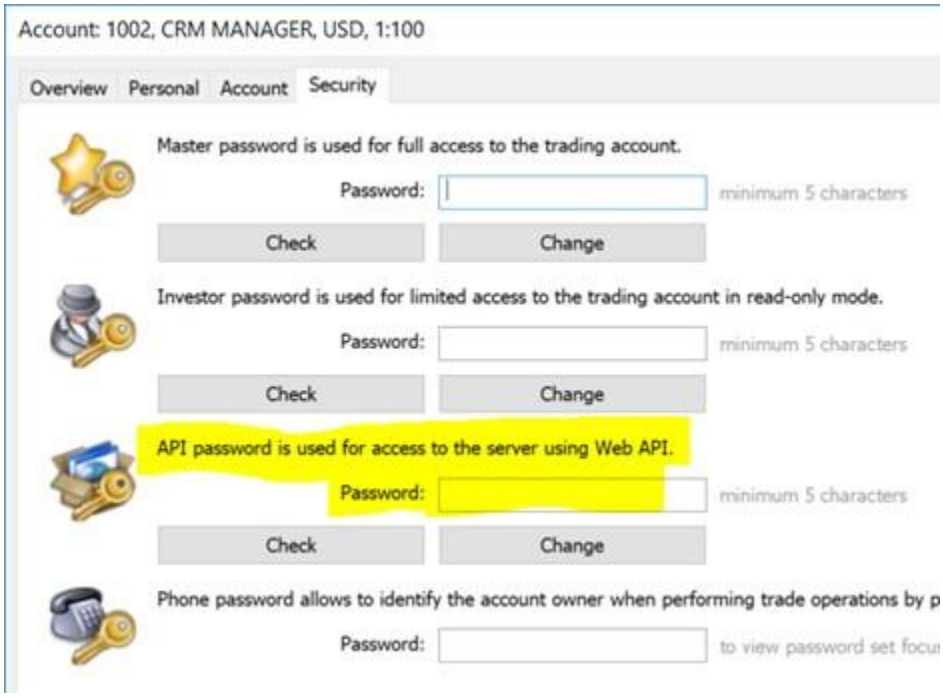


Account setup

After creating an account, you need to configure it. The "Allow account via API / FIX" option must be enabled on the tab "Account":



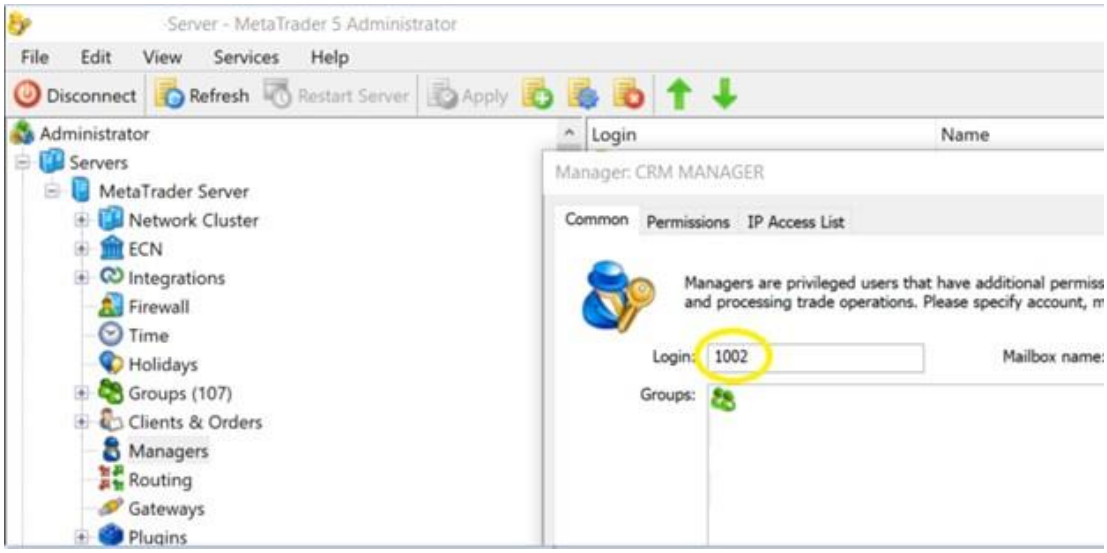
On the Security tab, you must set the API password:



Enter the password in the appropriate field and click the "Change" button. This password will be used to connect the Web client to the trading server.

Manager Configuration

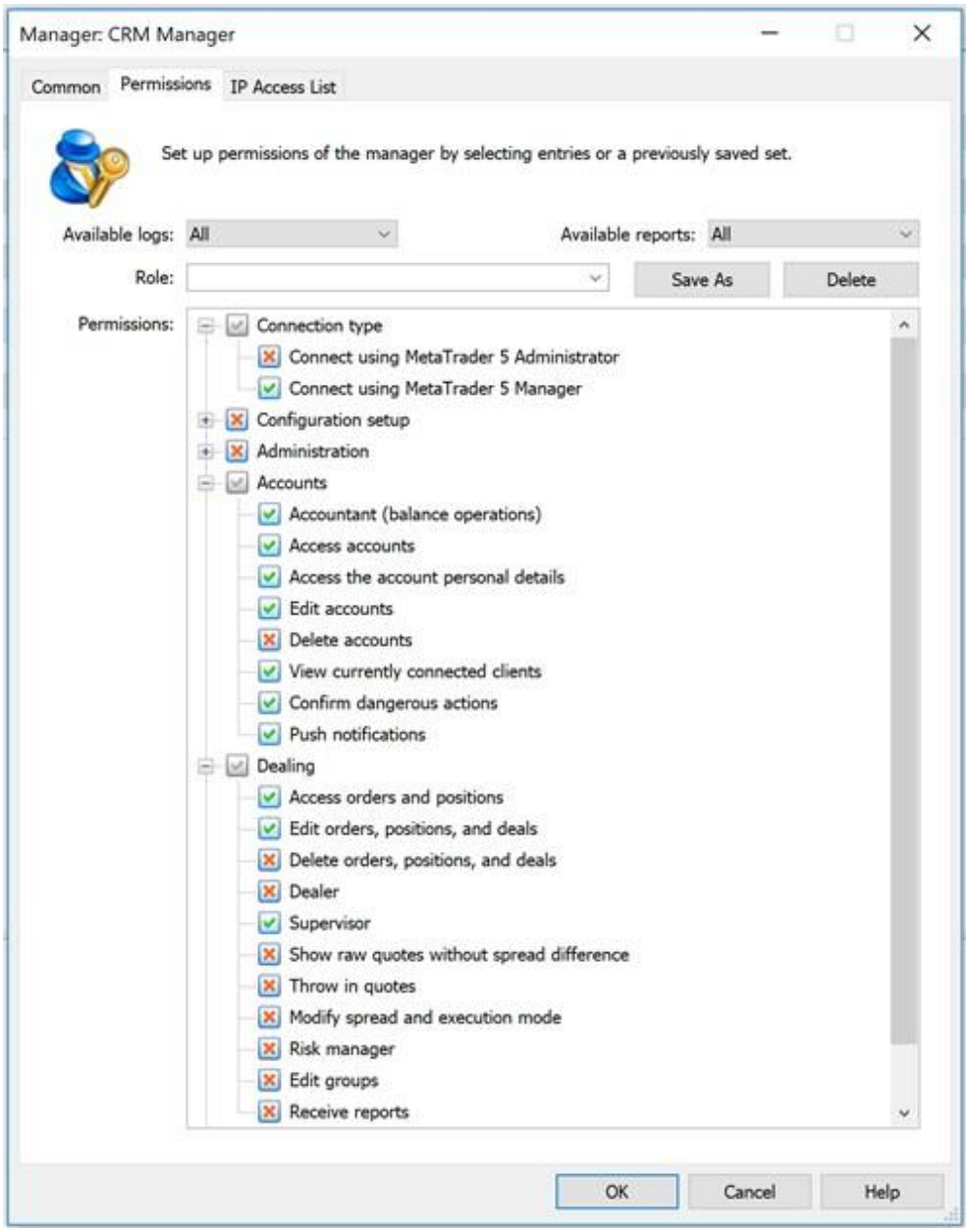
After setting up the created account, it is necessary to create a manager account on its basis. To do this, go to the appropriate section of MetaTrader 5 Administrator and run the command " Add. "



On the General tab, you need to set the following parameters:

- Login - in this field you must specify the login of the account you just created.
- Groups - this field specifies the groups with which the Web client can work.

On the Rights tab, you must configure access restrictions for the Web client.


Manager: CRM Manager
Common
Permissions
IP Access List
Set up permissions of the manager by selecting entries or a previously saved set.
Available logs:
All
Available reports:
All
Role:
Save As
Delete
Permissions:
Connection type
Connect using MetaTrader 5 Administrator
Connect using MetaTrader 5 Manager
Configuration setup
Administration
Accounts
Accountant (balance operations)
Access accounts
Access the account personal details
Edit accounts
Delete accounts
View currently connected clients
Confirm dangerous actions
Push notifications
Dealing
Access orders and positions
Edit orders, positions, and deals
Delete orders, positions, and deals
Dealer
Supervisor
Show raw quotes without spread difference
Throw in quotes
Modify spread and execution mode
Risk manager
Edit groups
Receive reports
OK
Cancel
Help