



ANTOS PINNACLES

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) GUIDE – REPORT

<https://member.antos.io/#/user/login>



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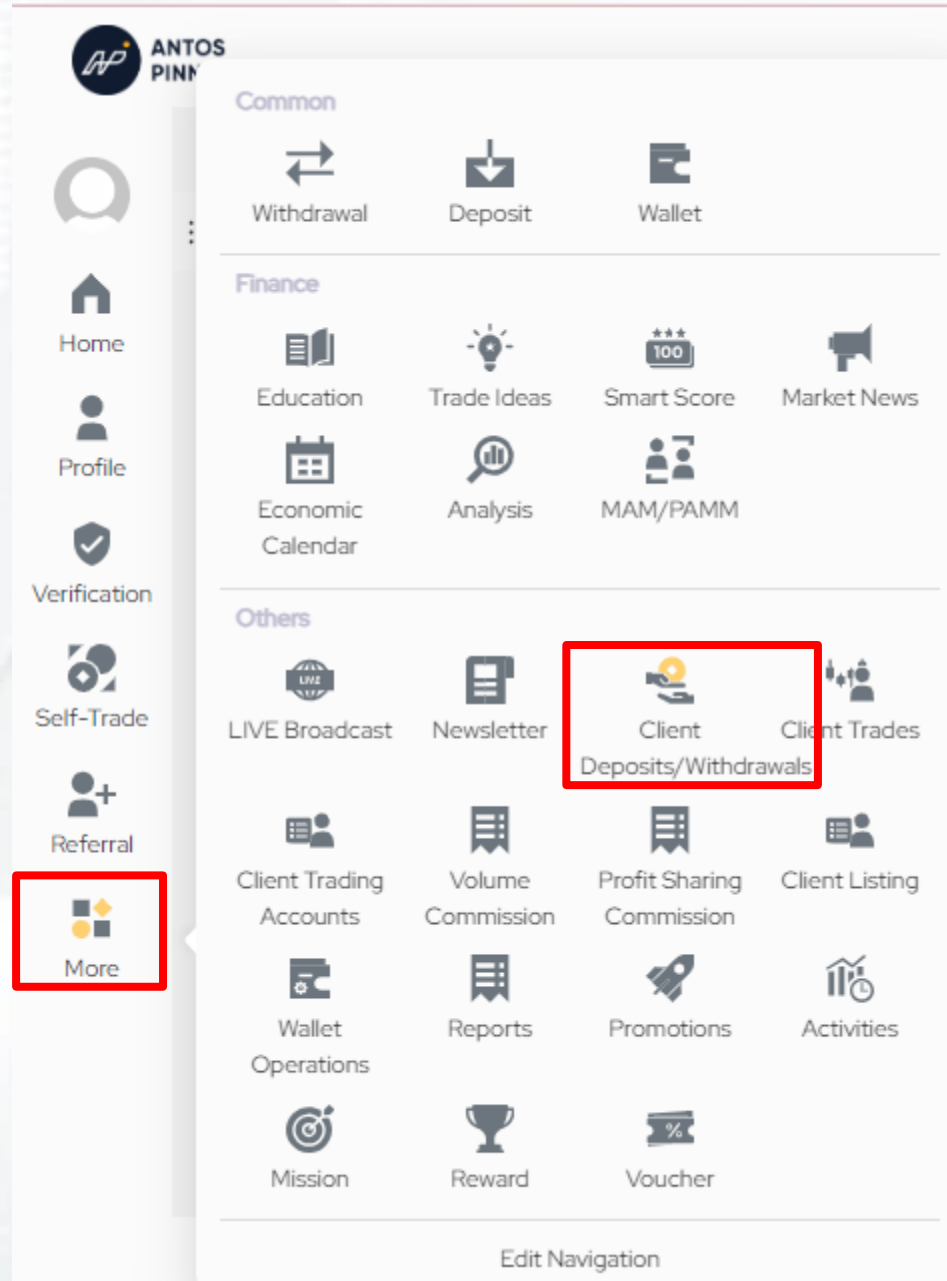
Client Deposit / Withdrawal (Guide)



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Client Deposit / Withdrawal

- Click “More” on the left menu
- Click “Client Deposit / Withdrawal”





Client Deposit / Withdrawal

- **You can view your client's transaction history at the bottom of the page.**
- **Alternatively, you can filter your clients by searching for their username, payment method, transaction number, type of transaction (Deposit/Withdrawal), and date.**

[Home](#) / [Reports](#) / [Client Deposits/Withdrawals](#)

Username

Payment Method

Transaction No

Type


▼

Date

Start date

→

End date



Search

0

Clients

0


Transactions

0

Nett Deposit

0

Pending transactions

Date	Payment Method	Type	Transaction No	Username	Transacted Amount	Transacted Currency	Amount (USD)	Status
<div><div></div><div>No Data</div></div>								



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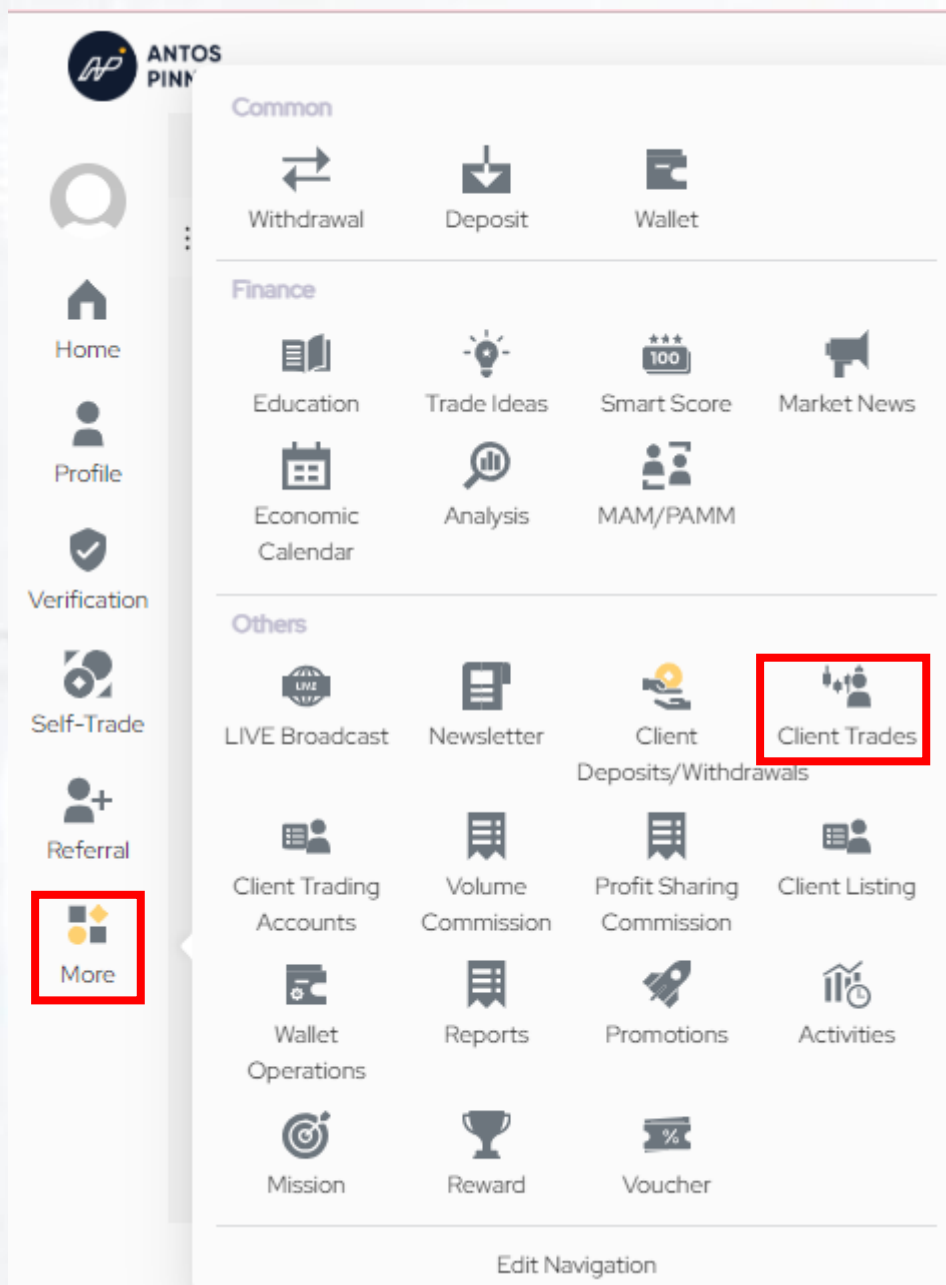
Client Trades (Guide)



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Client Trades

- Click “More” on the left menu
- Click “Client Trades”





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Client Trades

- You can view your client's trades history at the bottom of the page.
- Alternatively, you can filter your clients by searching for their client's name, account number, deal ID, direction, execution time, and trade duration.
- In between the two steps above, you can view your client's transaction amount, trading volume (Lots), and profits (USD).

Home / Reports / Client Trades

Client

Account No

Deal ID

Direction

Execution Time

Trade Duration (mins)

Start date

→ End date

mins

Search

0

0

0

TransactionsVolume (Lots)Profit (USD)

Client

Account No

Symbol

Deal ID

Trade Side

Trade Duration

Direction

Volume (Lots)

Price

Execution Time Stamp

Profit

Deal Status

No Data



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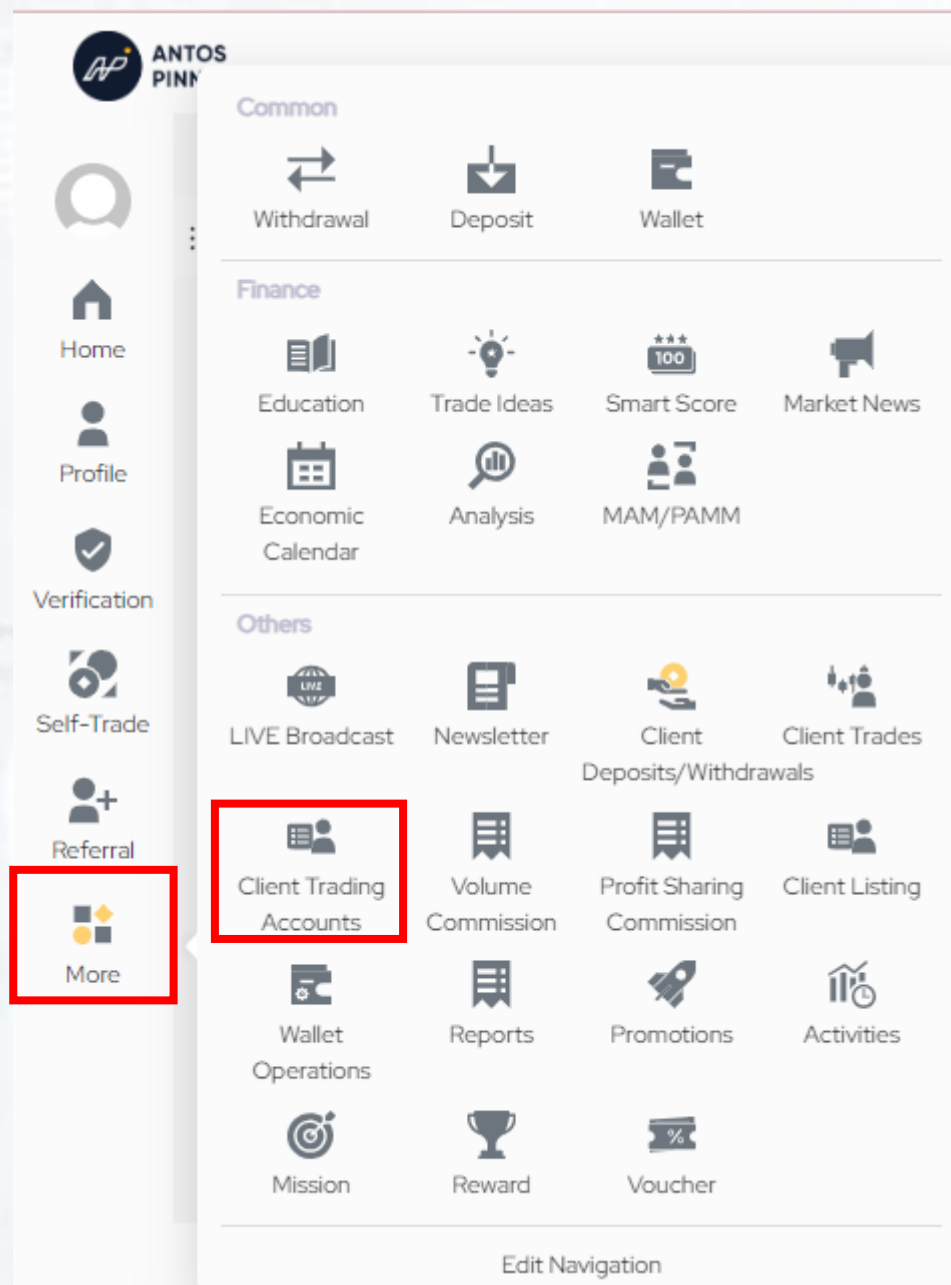
Client Trading Account (Guide)



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Client Trading Account

- Click “More” on the left menu
- Click “Client Trading Account”





Client Trading Account

- You can view your client's trading account at the bottom of the page.
- Alternatively, you can filter your clients by searching for their client's name, account number, client's product, leverage, and registration date
- In between the two steps above, you can view your client's amount of account, trades, volume lots, client's balance, equity, amount of profit (USD)

Home / Reports / Client Trading Accounts

Client

Account No

Product

Leverage

Registration Date

Start date → End date

Search

3

0

0

7,000.00

7,000.00

0

Accounts

Trades

Volume Lots

Balance

Equity

Profit (USD)

Account No	Client	Product	Leverage	Balance	Credit	Equity	Trades	Volume Lots	Profit	Registration Date
662788	natasha_demo	julie investor pamm	1:200	2,000.00	-	2,000.00	0	0	-	2024-08-26
662742	natasha_demo	Testing Account	1:200	5,000.00	-	5,000.00	0	0	-	2024-08-21
662513	natasha_demo	Staff Account	1:200	-	-	-	0	0	-	2024-07-11

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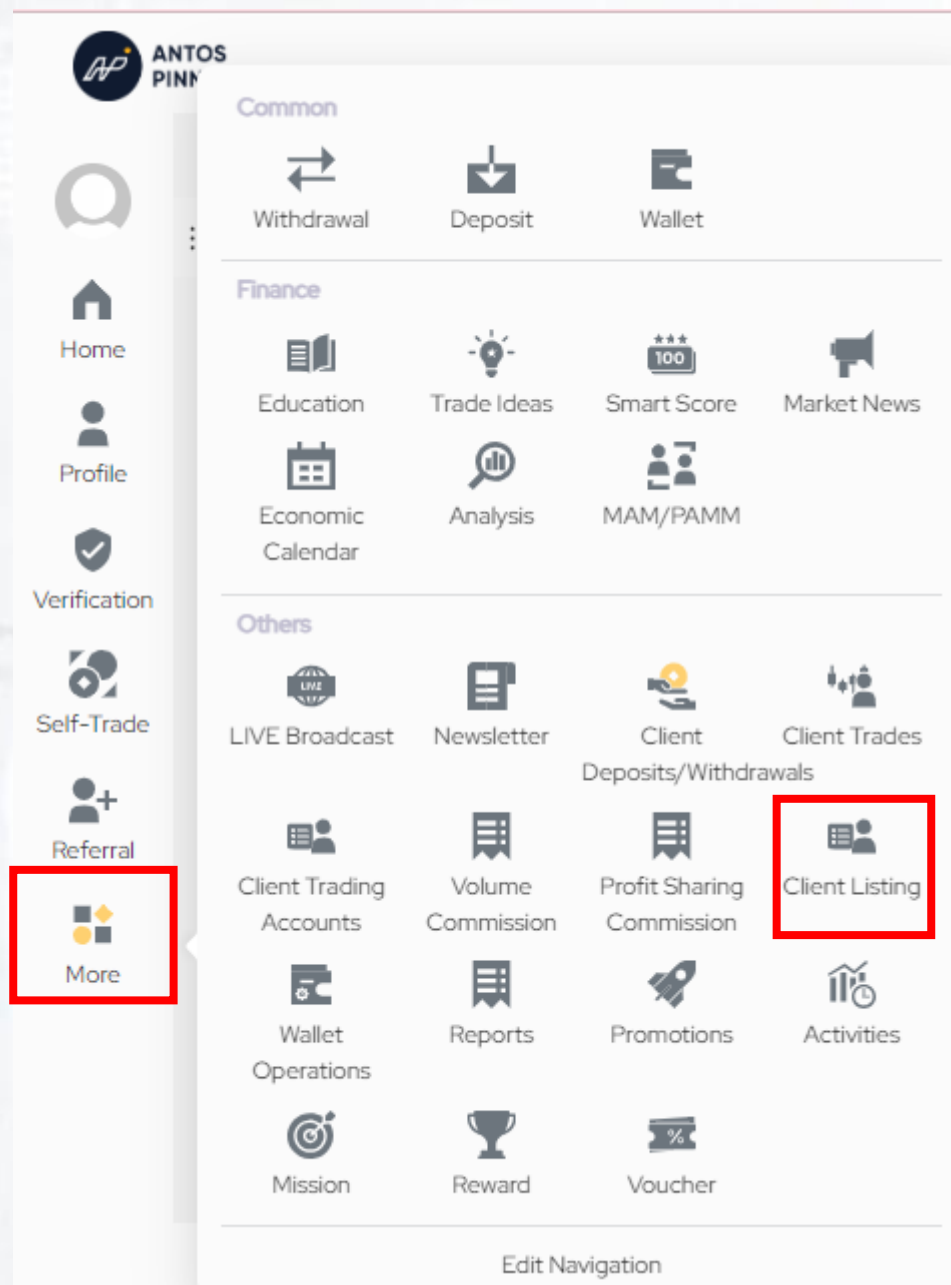
Client Listing (Guide)



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Client Listing

- Click “More” on the left menu
- Click “Client Listing”





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Client Listing

- You can view your client's listing at the bottom of the page.
- Alternatively, you can filter your clients by searching for their username, full name, email, and registration date
- In between the two steps above, you can view your client's trading account, volume lots, amount of profit (USD), & their nett deposit

Home / Reports / Client Listing

Username

Full Name

Email

Registration Date

Start date → End date

Search

1

3

0

0

0

Clients

Accounts

Volume Lots (USD)

Profit (USD)

Nett Deposit

Username	Full Name	Email	Registration Date	Number of Trading Account	Volume (Lots)	Profit
natasha_demo	Natasha	nsnatasha02@gmail.com	2024-07-10 03:07:45	3	0	-

Total 1 items < 1 > 10 / page