CUSTOMER RELATIONSHIP MANAGEMENT

(CRM) GUIDE – REPORT

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

ANTOS PINNACLES

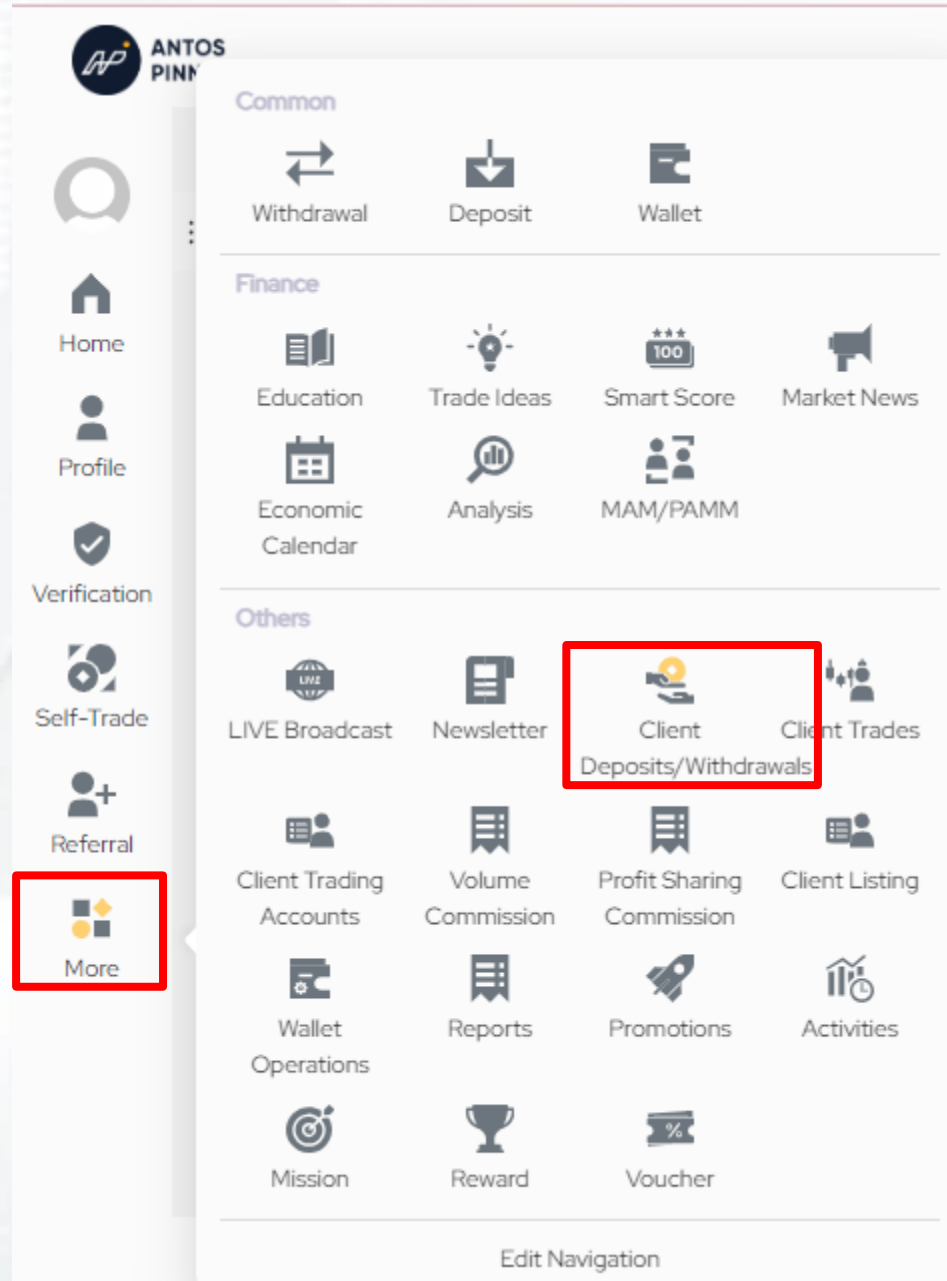# Client Deposit / Withdrawal (Guide)

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.**

Client Trades (Guide)

Client Trades

- Click "More" on the left menu

- Click "Client Trades"
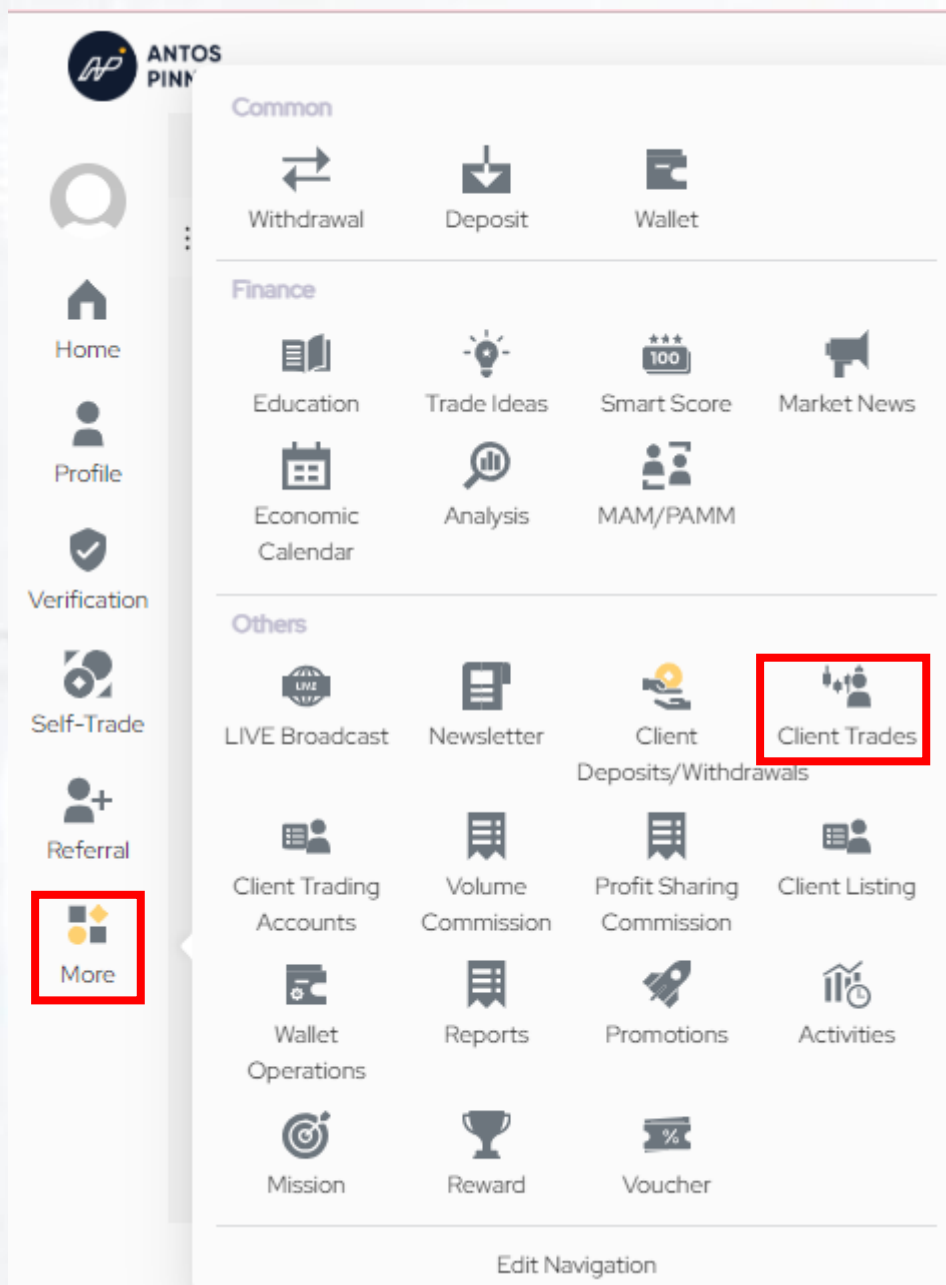
Client Trades

- **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).**

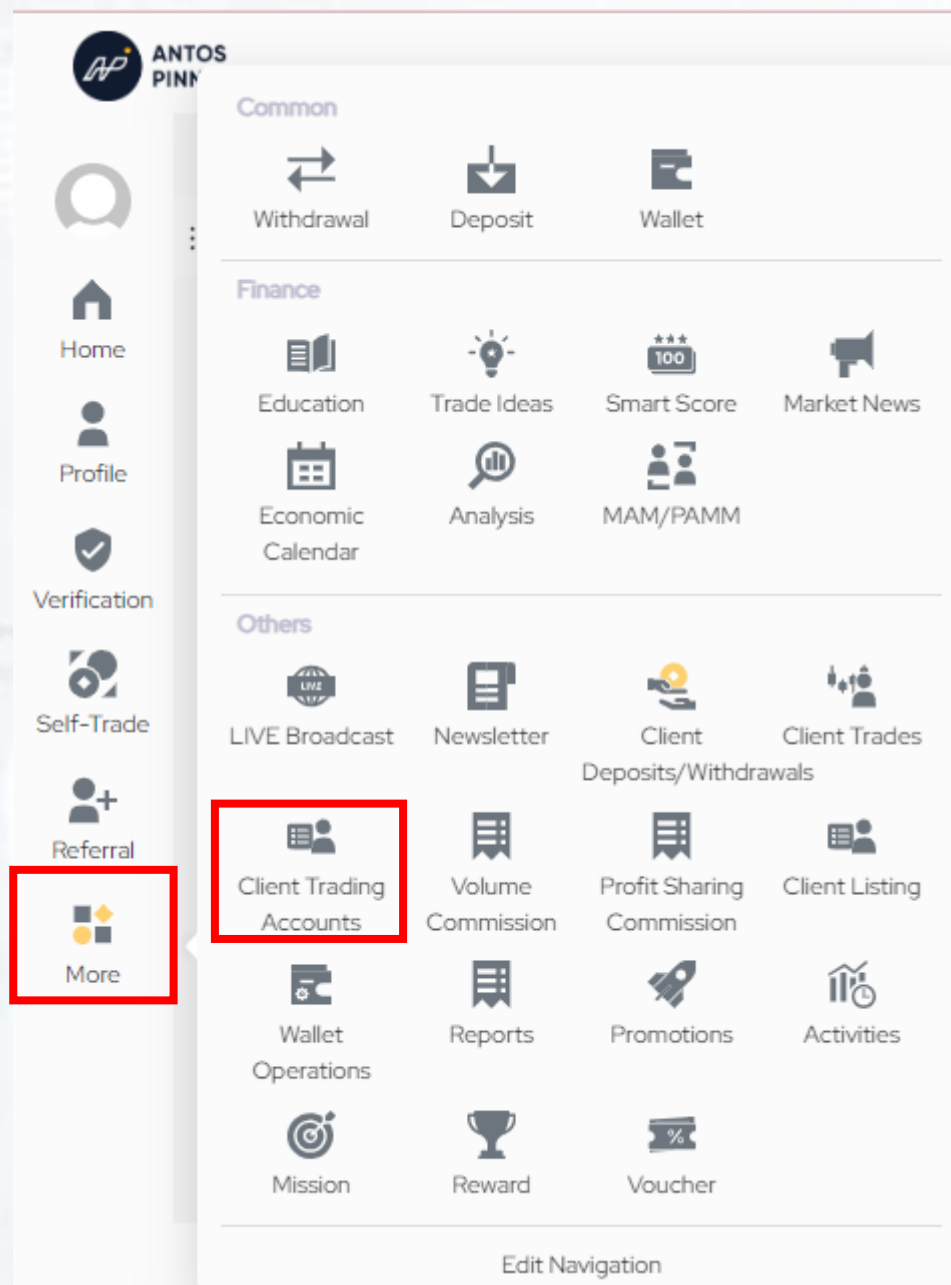# Client Trading Account (Guide)

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)**

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)

Client Listing

- **Click "More" on the left menu**

- **Click "Client Listing"**
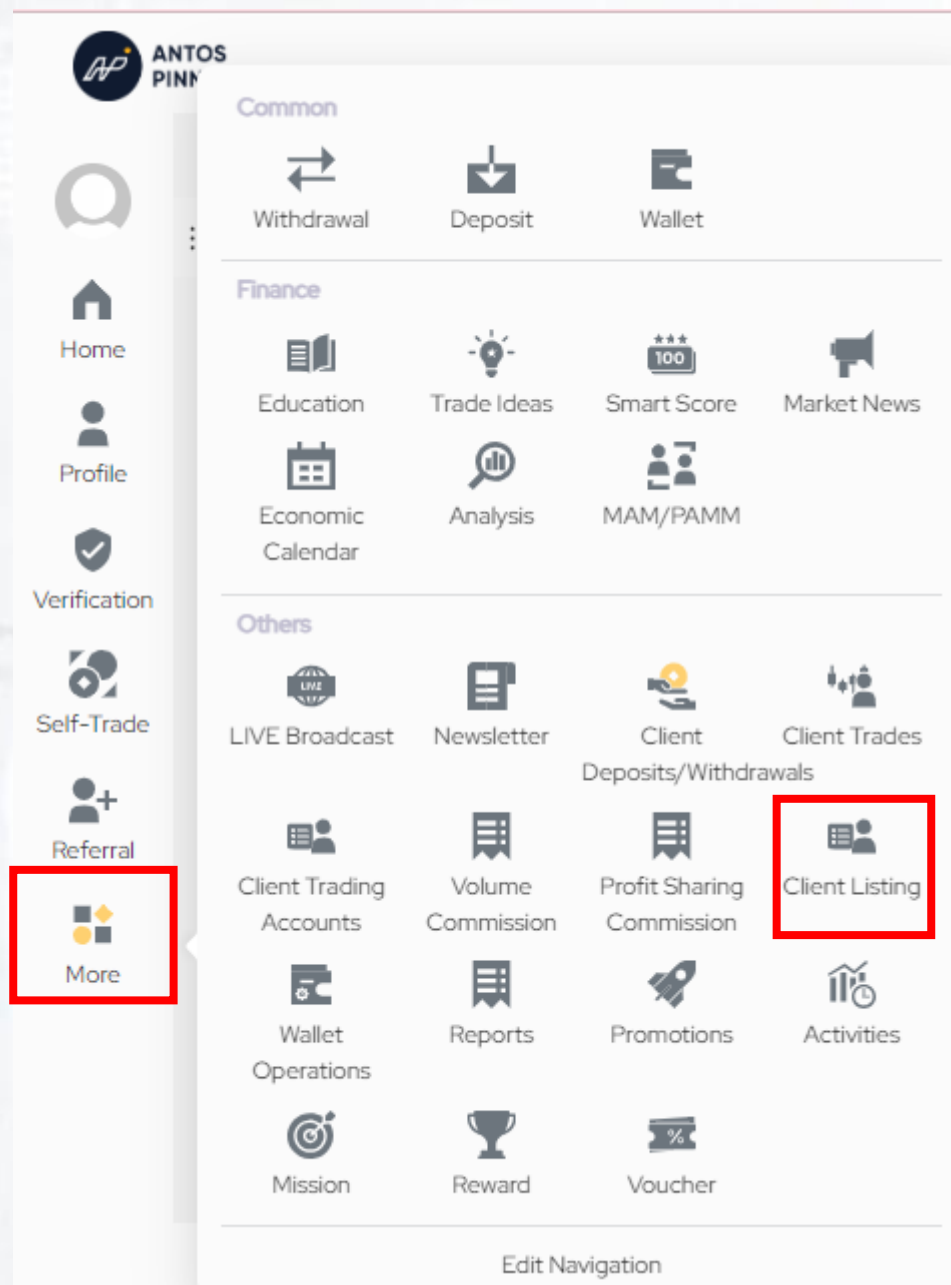
Client Listing

- **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	-

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