Investo
Investment Platform

ADMIN GUIDE

Running your platform from the admin panel

Every page of the admin panel, what each control does, and step by step instructions with screenshots. Market Controls and Social Proof are covered in full detail.

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SECTION 1

Getting started

This guide explains every page of the admin panel. Each section says what the page is for, what every button does, and how to do common jobs step by step. The screenshots use sample customers, so your numbers and names will be different.

> **WHERE TO FIND IT**
> The admin panel is at your website address followed by **/admin**, for example **yourbusiness.com/admin**. Customers never see it.

Signing in

1. Open **yourbusiness.com/admin** in your browser.
2. Type the email and password of your admin account, then click **Log In**.
3. The first time you sign in, the panel asks you to set up two-factor sign-in. Scan the QR code with an authenticator app such as Google Authenticator, Microsoft Authenticator or Authy, then type the 6 digit code it shows.
4. From then on, every sign-in asks for your password and a fresh 6 digit code from the app.

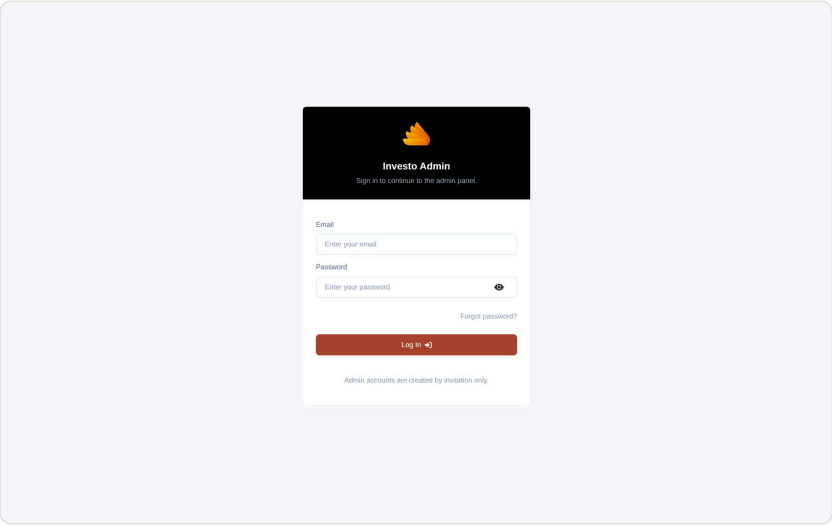


Figure 1. The admin sign-in page.

> **GOOD TO KNOW**
> Admin accounts are created by invitation only. Nobody can sign up as an admin from this page.

Finding your way around

The menu on the left lists every page, grouped by job. The groups are **Main**, **Customers**, **Money**, **Support and Engagement** and **System**. Click **System** to open its pages.

Each admin sees only the pages their role allows. A support admin, for example, does not see Treasury or Market Controls.

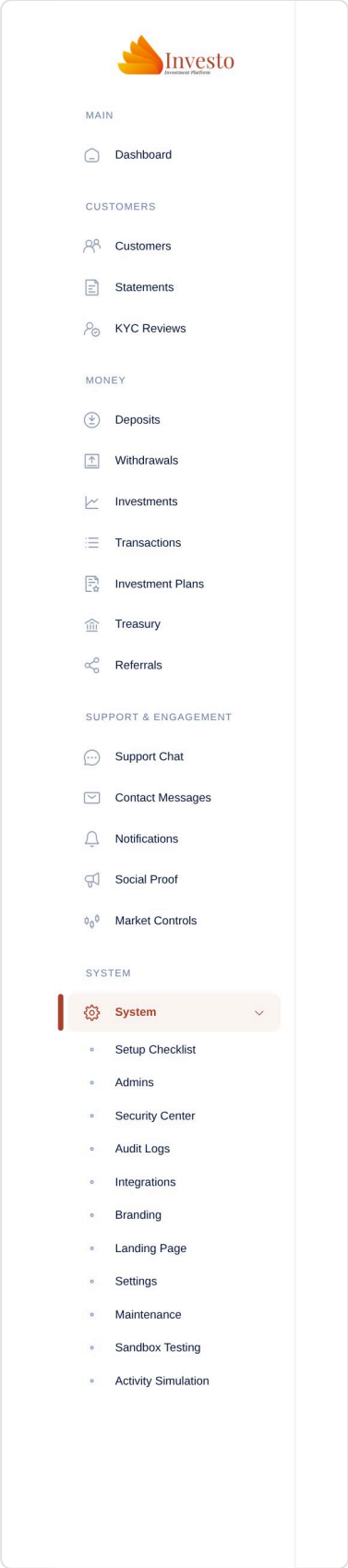


Figure 2. The full menu with System opened.

The bar at the top has a menu button that hides or shows the side menu, a customer search box, a light and dark mode switch, and your profile picture. Click your picture to open **My Profile** or to sign out.

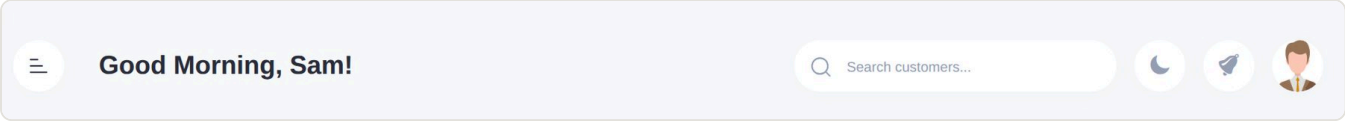


Figure 3. The top bar.

Admin roles

Every admin has one role. The role decides which pages they can open and what they can change.

Role	What they can do
Super Admin	Everything, including admins, security, integrations, keys and settings. Only a Super Admin can change or suspend another admin.
Finance Admin	View customers, confirm or reject deposits, approve and pay withdrawals, view investments, transactions and treasury.
Support Admin	Support chat, contact messages, sending notifications, and viewing customers and transactions.
Operations Admin	Announcements, branding, the landing page, investment plans, social proof, and viewing the market.
Demo Admin	A safe account for showing the panel to others. It can run customers, money, support, social proof and markets, but cannot touch admins, security, keys, integrations or settings.

SECTION 2

Dashboard

The dashboard is the first page after you sign in. It gives you the state of the business at a glance.

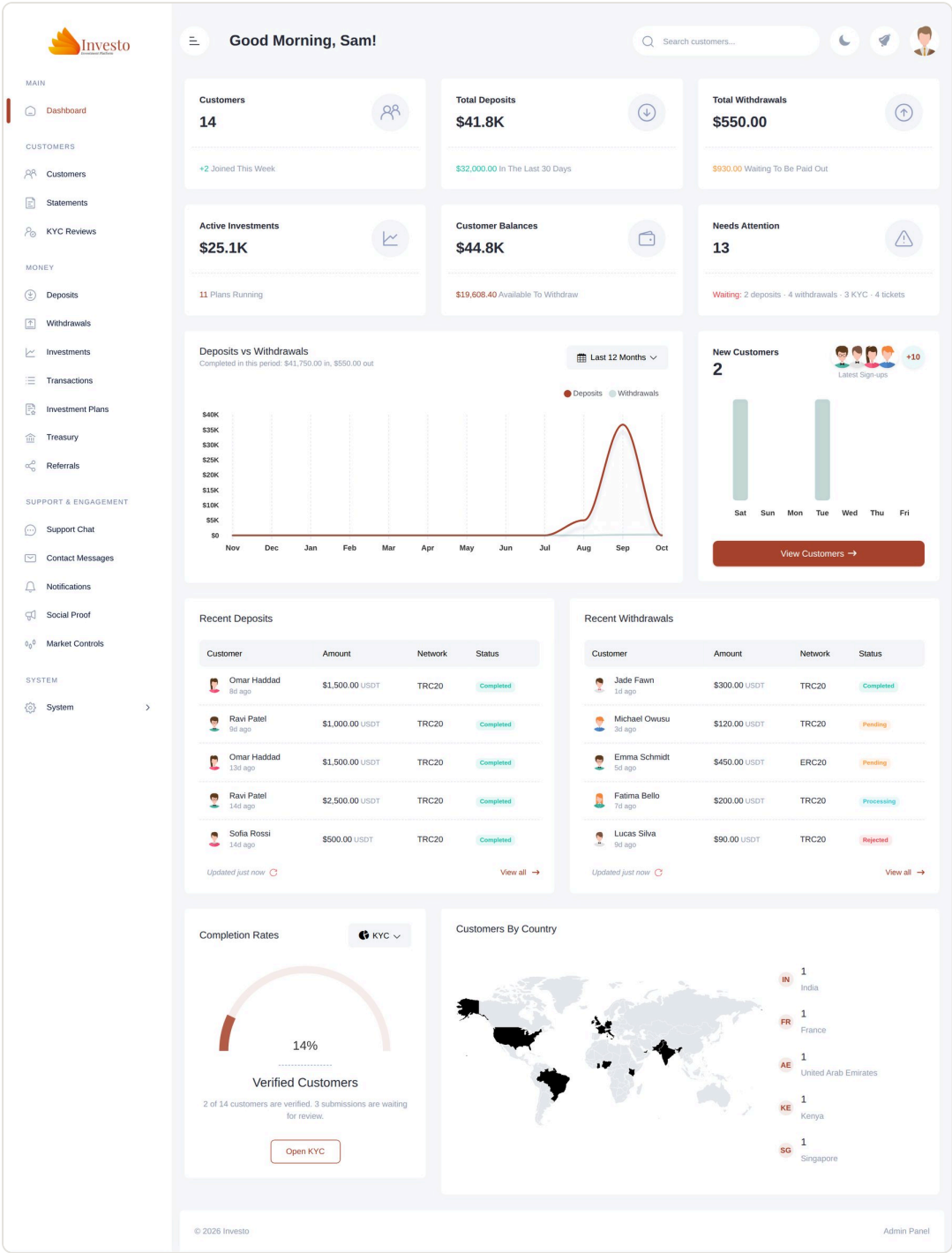


Figure 4. The dashboard.

Card	What it shows
Customers	How many customer accounts exist, and how many joined this week.
Total Deposits	All confirmed deposits, and the amount from the last 30 days.
Total Withdrawals	All paid withdrawals, and the amount still waiting to be paid.

Card	What it shows
Active Investments	Money in running plans, and how many plans are running.
Customer Balances	What customers hold in total, and how much of it they can withdraw now.
Needs Attention	Everything waiting for you: deposits to confirm, withdrawals to pay, ID checks and open support chats.

Below the cards you will find a chart of deposits against withdrawals, the newest customers, the latest deposits and withdrawals, how many customers are verified, and a map of where customers live.

> **TIP**
> Start each day with the **Needs Attention** card. It tells you exactly which pages have work waiting.

SECTION 3

Customers

The customer list

Open **Customers** to see every customer with their country, account status, balance, invested amount and join date. Type in the search box to find someone by name or email. Click **Export CSV** to download the list as a spreadsheet.

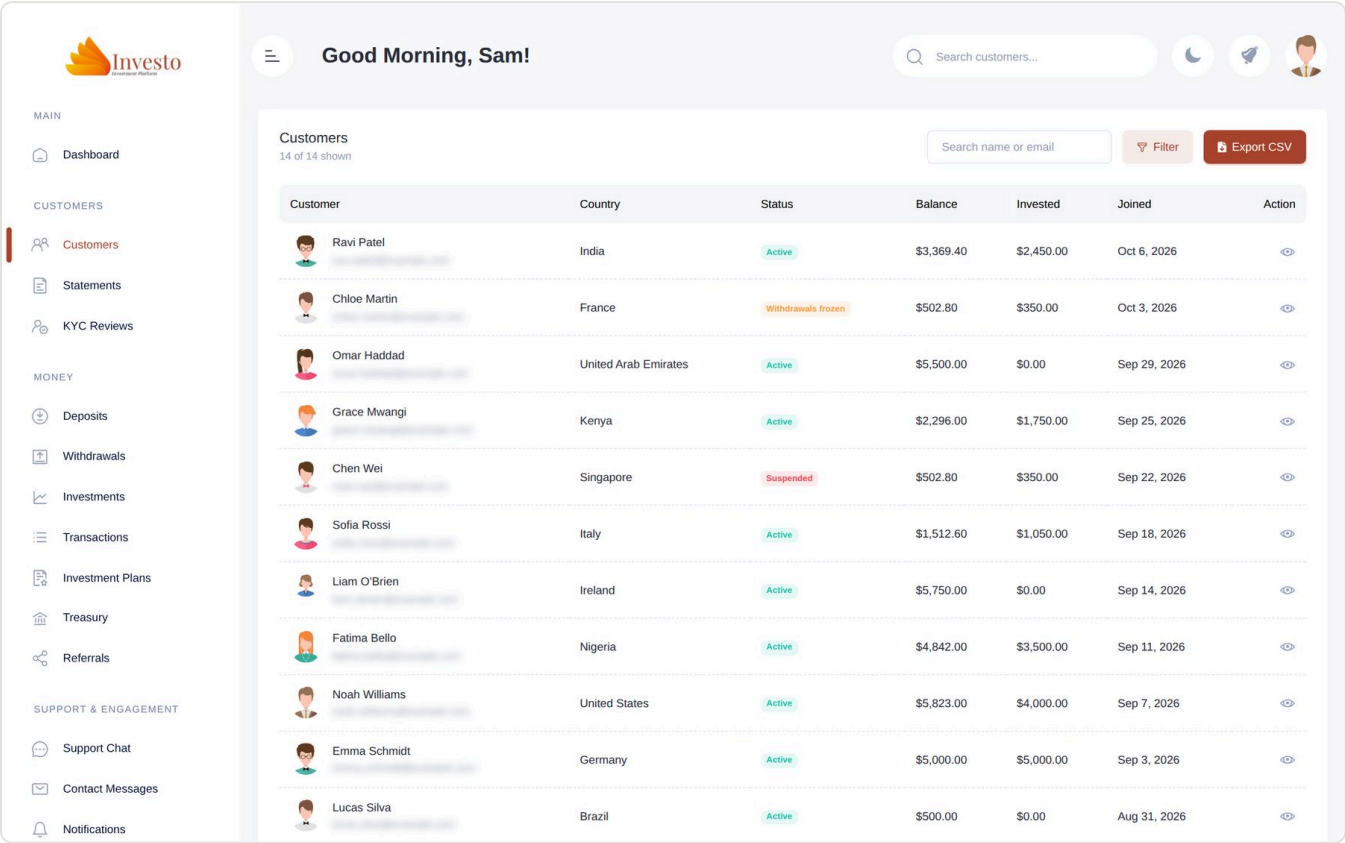


Figure 5. The customer list.

A customer profile

Click a customer to open their profile. The left card has their details and buttons. The right side shows their balances. Below that is all of their activity and, at the bottom, their chart projections.

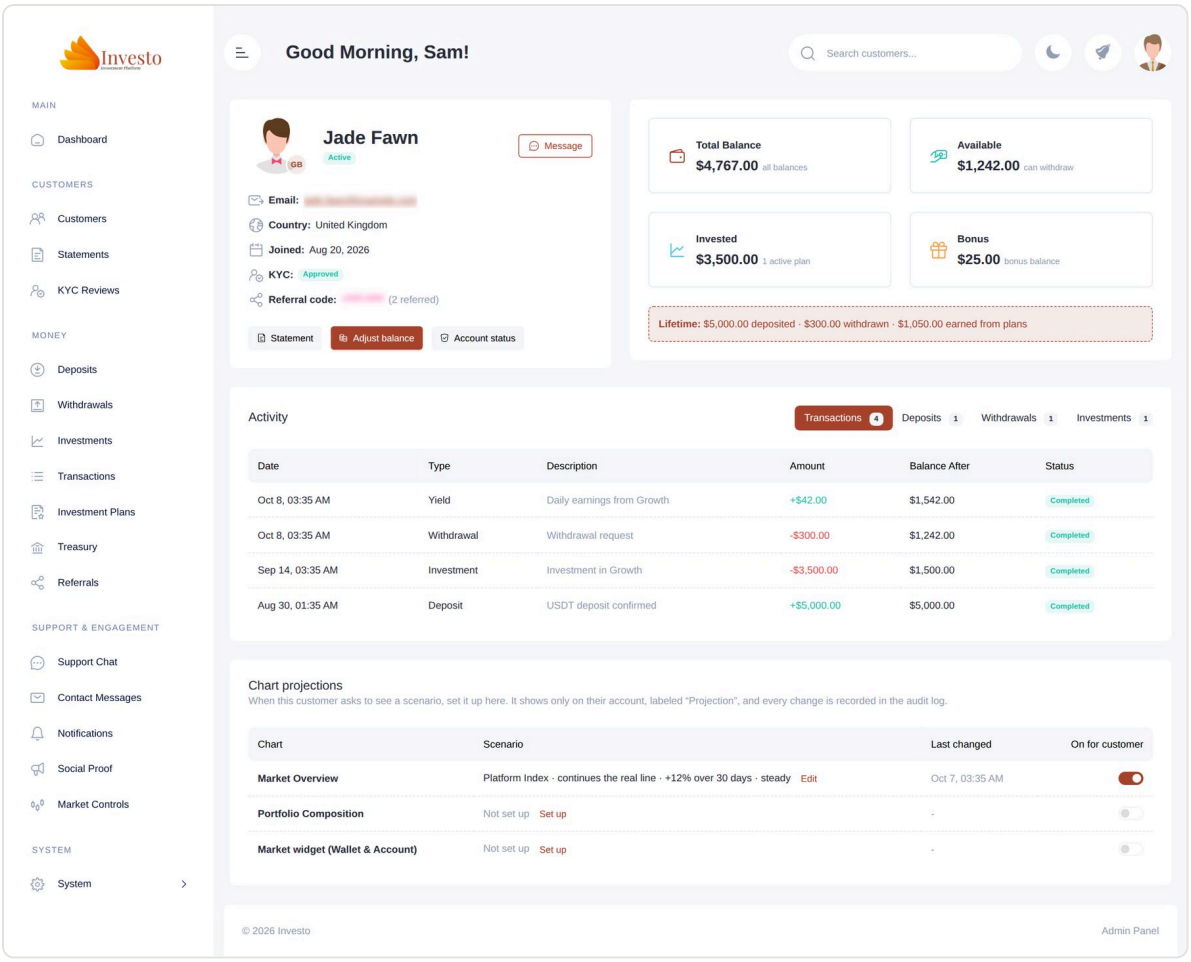


Figure 6. A customer profile.

Balance	Meaning
Total Balance	Everything the customer has: available money, money in plans and any bonus.
Available	Money they can invest or withdraw right now.
Invested	Money in running plans.
Bonus	Bonus money you or a referral reward added.

The **Activity** table has four tabs: Transactions, Deposits, Withdrawals and Investments. Every line shows the date, amount and status.

Adjusting a balance

Use this when you need to add or remove money by hand, for example to credit a deposit that arrived outside the platform or to correct a mistake.

1. Open the customer and click **Adjust balance**.
2. Choose the **Balance** to change: Available balance or Bonus balance.
3. Choose **Credit (+)** to add money or **Debit (-)** to remove it.
4. Type the amount in US dollars.

5. Write a **Reason**. The customer sees this reason in their transaction history, so keep it clear, for example "Deposit credited manually".
6. Add **Internal notes** if you want. Only admins see these.
7. Click **Apply adjustment**. The change is saved at once and recorded in the audit log.

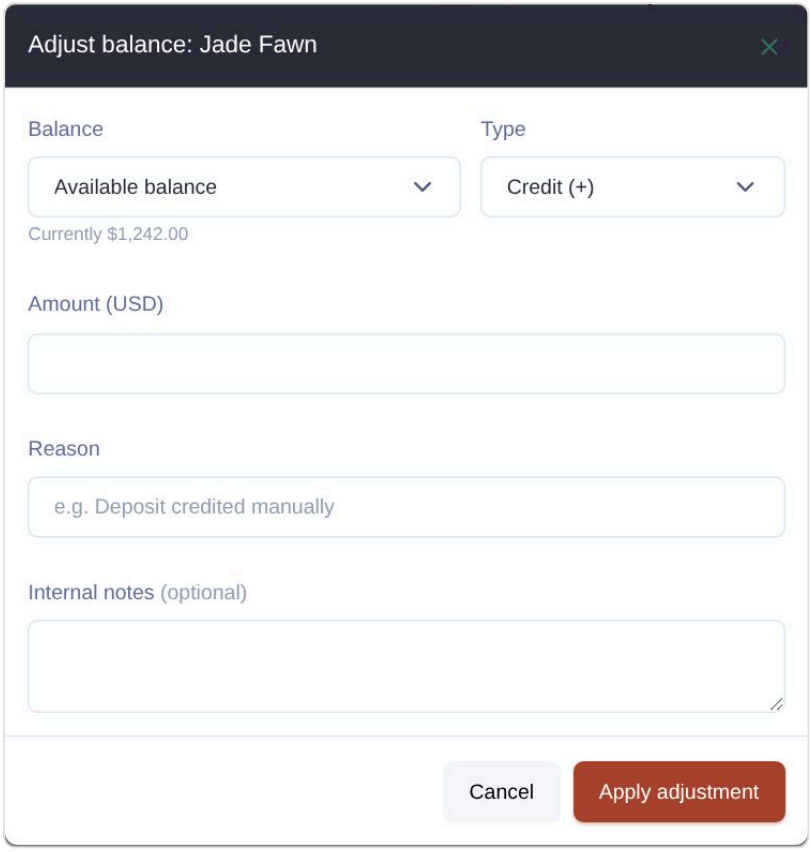


Figure 7. Adjusting a balance.

Account status

Click **Account status** on a profile to limit what a customer can do. The menu only lists the statuses the customer is not already in. Choose **Restore** to make the account normal again.

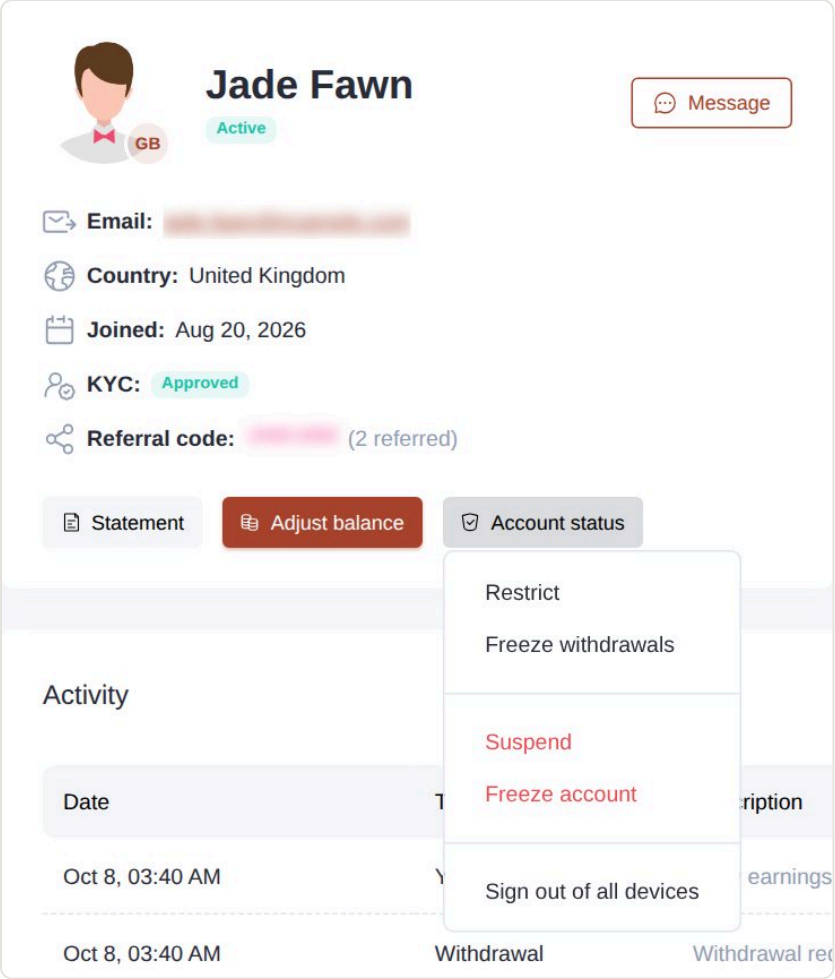


Figure 8. The account status menu.

Status	What the customer can still do	What is blocked
Active	Everything.	Nothing.
Restricted	Sign in, view everything, withdraw, move earnings to balance.	New deposits and new investments.
Withdrawals frozen	Sign in, deposit, invest, move earnings to balance.	Withdrawals.
Suspended	Sign in and view their account.	Deposits, investments, withdrawals, Move to balance and ending a plan early.
Frozen	Sign in and view their account.	The same as Suspended. Use it while you look into a problem with the account.

When a blocked customer tries one of these actions, they see a message asking them to contact support. Click **Sign out of all devices** in the same menu to end every session the customer has open.

Statements

A statement is a printable summary of one customer's money over a period. You can open it from the **Statements** page or with the **Statement** button on a profile.

1. Open **Statements** and choose the customer.
2. Pick the **From** and **To** dates.
3. The statement appears below. Click **Print** to print or save it as a PDF, **CSV** to download it as a spreadsheet, or **Email to customer** to send it to them.

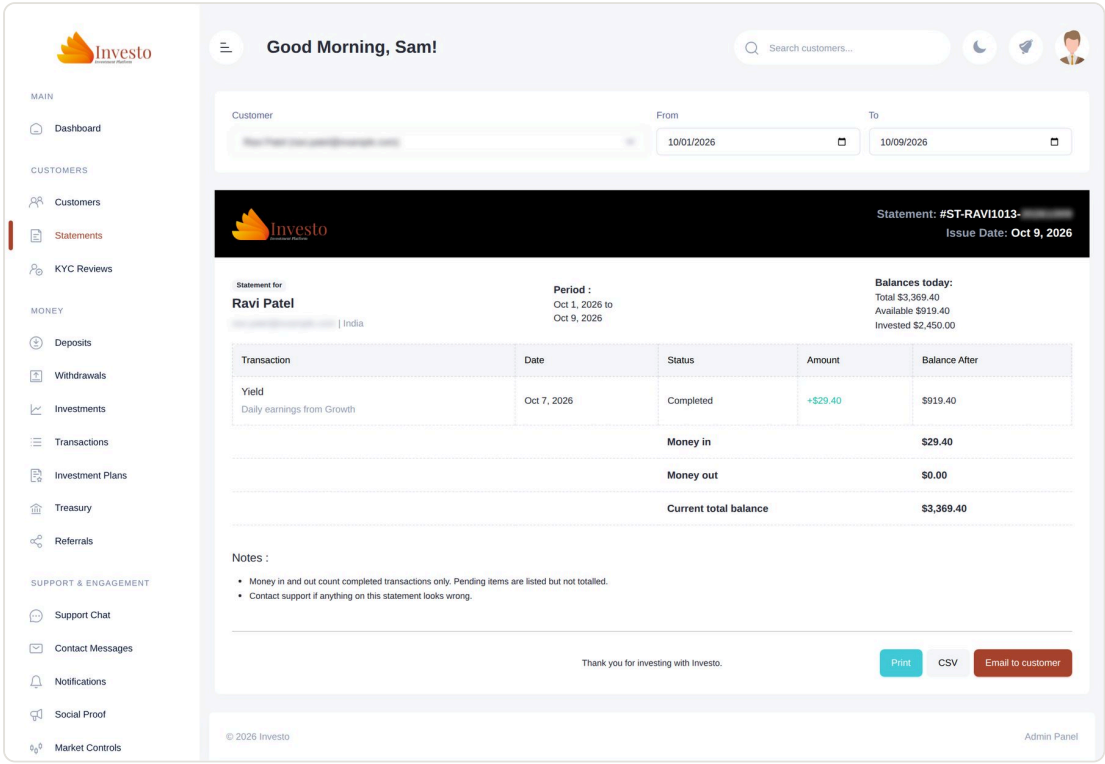


Figure 9. A customer statement.

Chart projections

A projection is a dashed "what if" line you can show on one customer's chart, for example to show a client what 30 days at 12% could look like. It is always labeled **Projection** and never changes their real balance. Projections are covered step by step in Section 13, under **Projections for one customer**.

SECTION 4

KYC reviews

KYC means "know your customer". Customers upload an ID document and a proof of address from their Settings page. You check the documents here and approve or reject them.

WHY IT MATTERS

Customers without an approved ID check can withdraw up to **$150 in total**. After approval there is no such limit. You can change the $150 on the **Treasury** page.

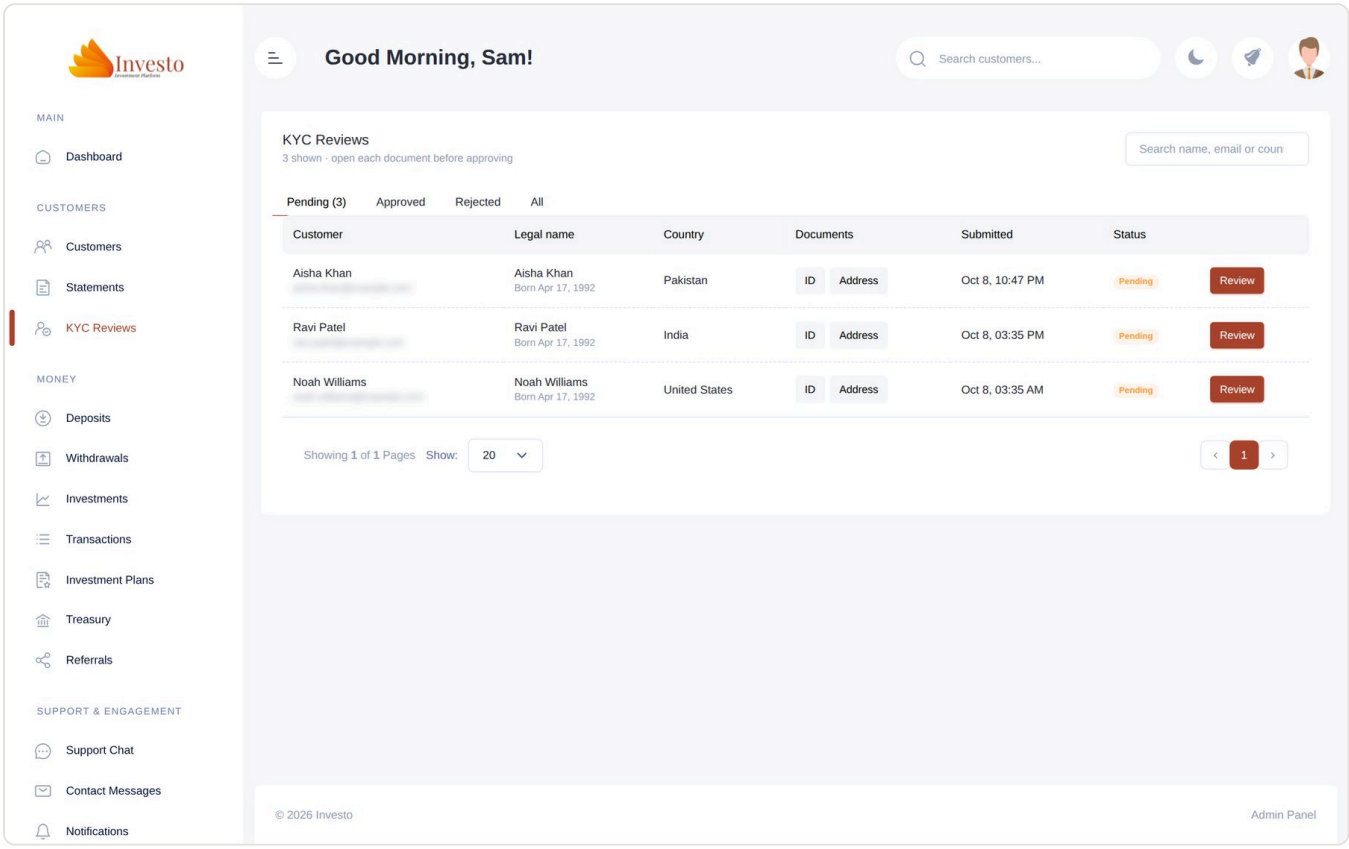


Figure 10. The KYC Reviews page.

1. Open **KYC Reviews**. The **Pending** tab lists everyone waiting.
2. Click **ID** or **Address** in the Documents column for a quick look, or click **Review**.
3. In the review window, click **Open ID document** and **Open proof of address**. Check that the name and date of birth match the legal name shown, and that the documents are clear.
4. Click **Approve** if everything matches.
5. To reject, write a short note that tells the customer what to fix, for example "The ID photo is blurry. Please upload a clearer picture." Then click **Reject**. The customer sees your note and can upload again.

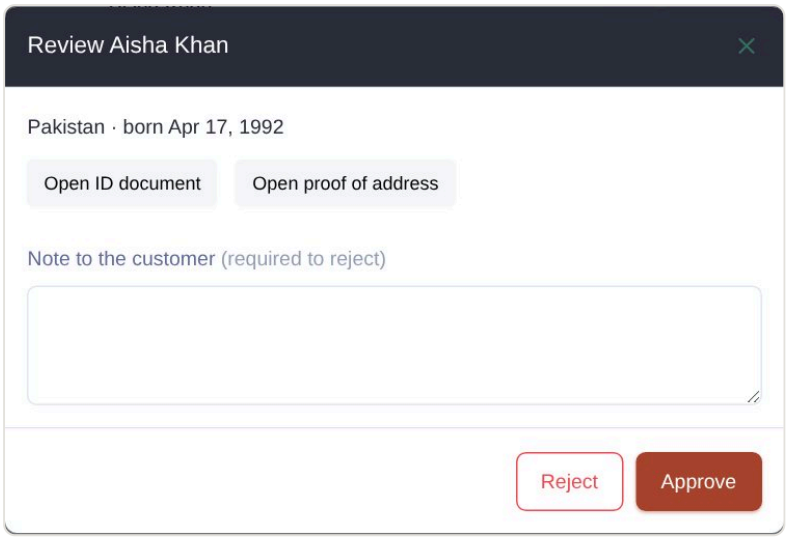


Figure 11. Reviewing a submission.

SECTION 5

Deposits

A deposit is money a customer sends to fund their account. Deposits are in crypto. They arrive in one of two ways.

How it arrives	What you do
PayRam (automatic)	The customer pays on a PayRam payment page. When the payment is complete, PayRam tells the platform and the deposit is credited by itself. You do not need to do anything.
Manual (wallet address)	The customer sends crypto to one of your wallet addresses and the deposit waits for you. You check that the money arrived, then confirm it.

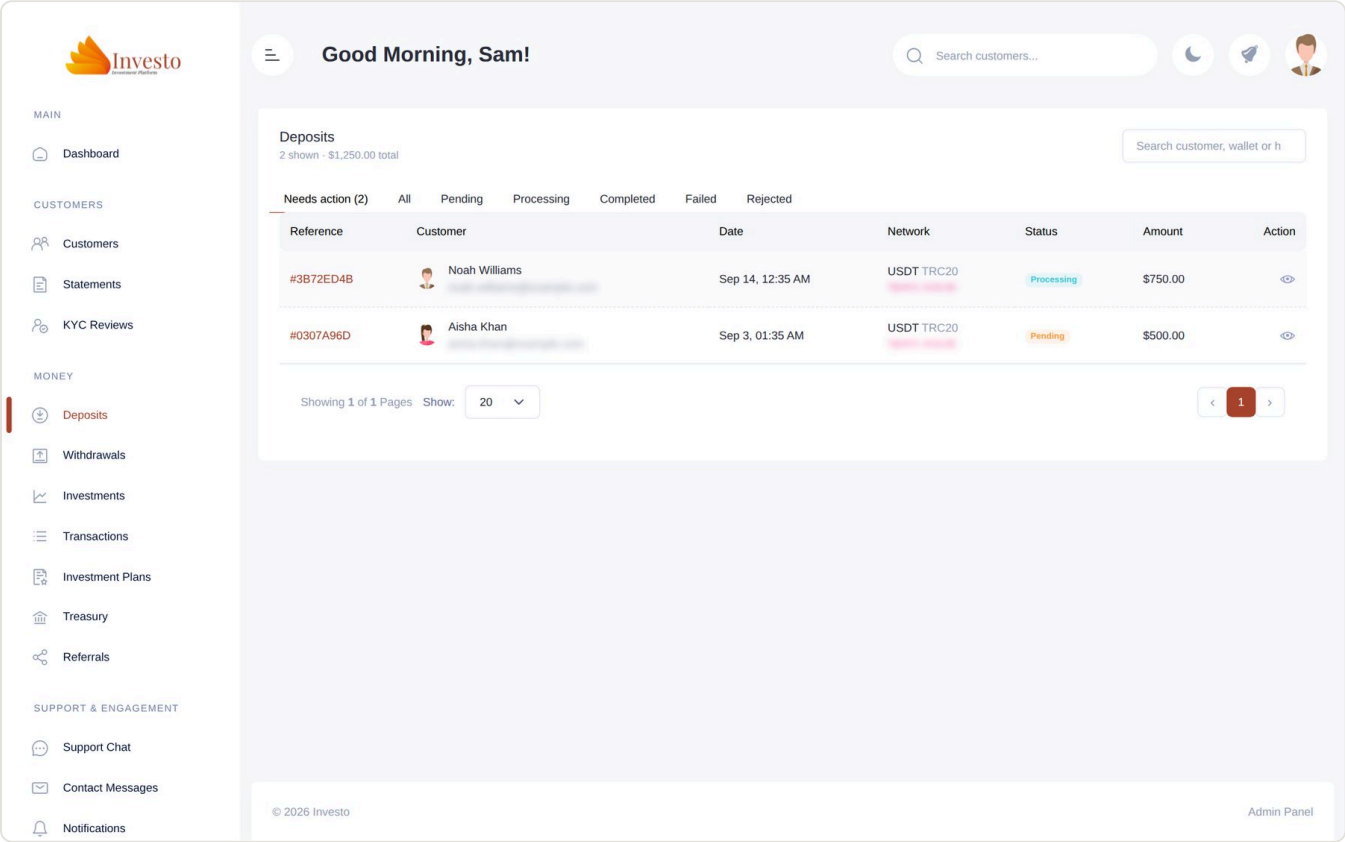


Figure 12. The Deposits page, on the Needs action tab.

Status	Meaning
Pending	Waiting. For manual deposits, waiting for you to check and confirm.
Processing	The payment has started but is not finished, for example PayRam saw part of the money.
Completed	Confirmed and added to the customer's available balance.
Failed	The payment did not finish, for example the customer closed the payment page.
Rejected	You rejected it. Nothing was added.

Confirming a manual deposit

1. Open **Deposits**. The **Needs action** tab shows deposits waiting for you.
2. Click the deposit. The page shows the amount, the coin and network, and the wallet address the customer paid to.
3. Open your wallet or a blockchain explorer and find the payment to that address.
4. Paste the **Transaction hash** from the blockchain into the box on the right. This is your proof.
5. Click **Confirm and credit**. The amount is added to the customer's available balance and they get a notification.
6. If no money arrived, write a short note and click **Reject**. The customer sees the note.

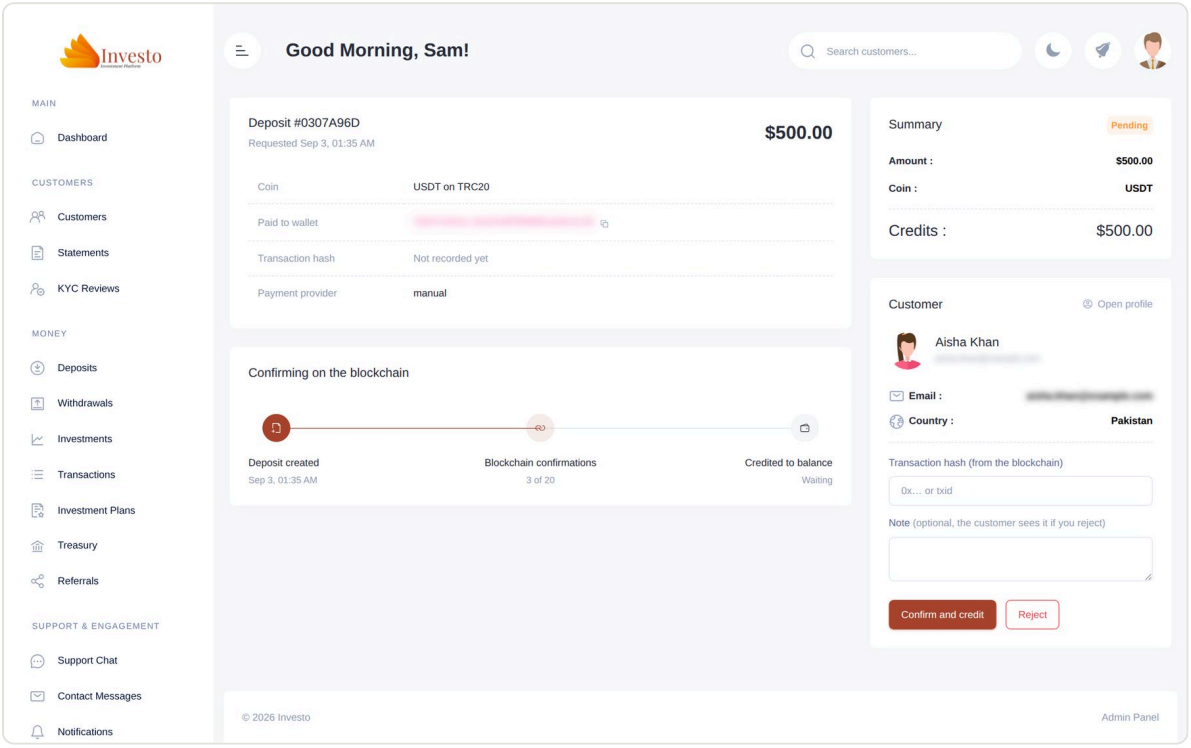


Figure 13. A manual deposit waiting to be confirmed.

> **IMPORTANT**
> Only confirm a deposit after you can see the money in your own wallet. A confirmed deposit is real money in the customer's balance that they can withdraw.

SECTION 6

Withdrawals

A withdrawal is a customer asking for their money to be sent to their own wallet. Every withdrawal waits for an admin. Nothing is paid out by itself.

The rules customers follow

- Payouts are in **USDT only**, on the TRC20 (Tron) or ERC20 (Ethereum) network. TRC20 has a much lower network fee.
- The smallest withdrawal is the lowest **Minimum withdrawal** among the customer's active plans. You set it per plan on the Investment Plans page.
- Without an approved ID check, a customer can withdraw up to **$150 in total**.
- The amount is taken from the customer's available balance when they ask, and returned if you reject.

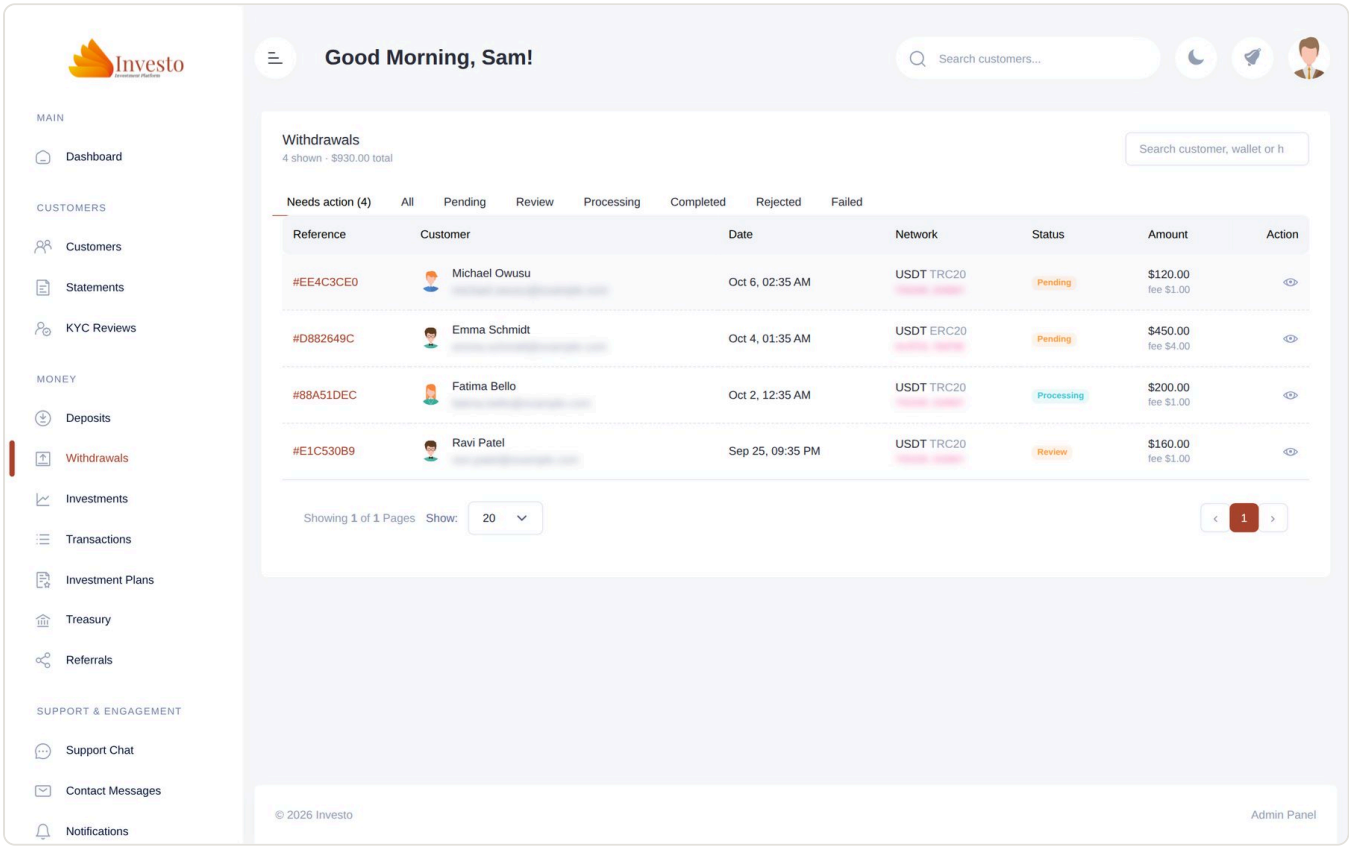


Figure 14. The Withdrawals page.

Status	Meaning
Pending	New request, waiting for you.
Review	You put it on hold to look into it.
Processing	Approved and being paid.
Completed	Paid. The transaction hash is saved.
Rejected	You rejected it and the money went back to the customer's balance.

Status	Meaning
Failed	The payout did not go through.

Paying a withdrawal

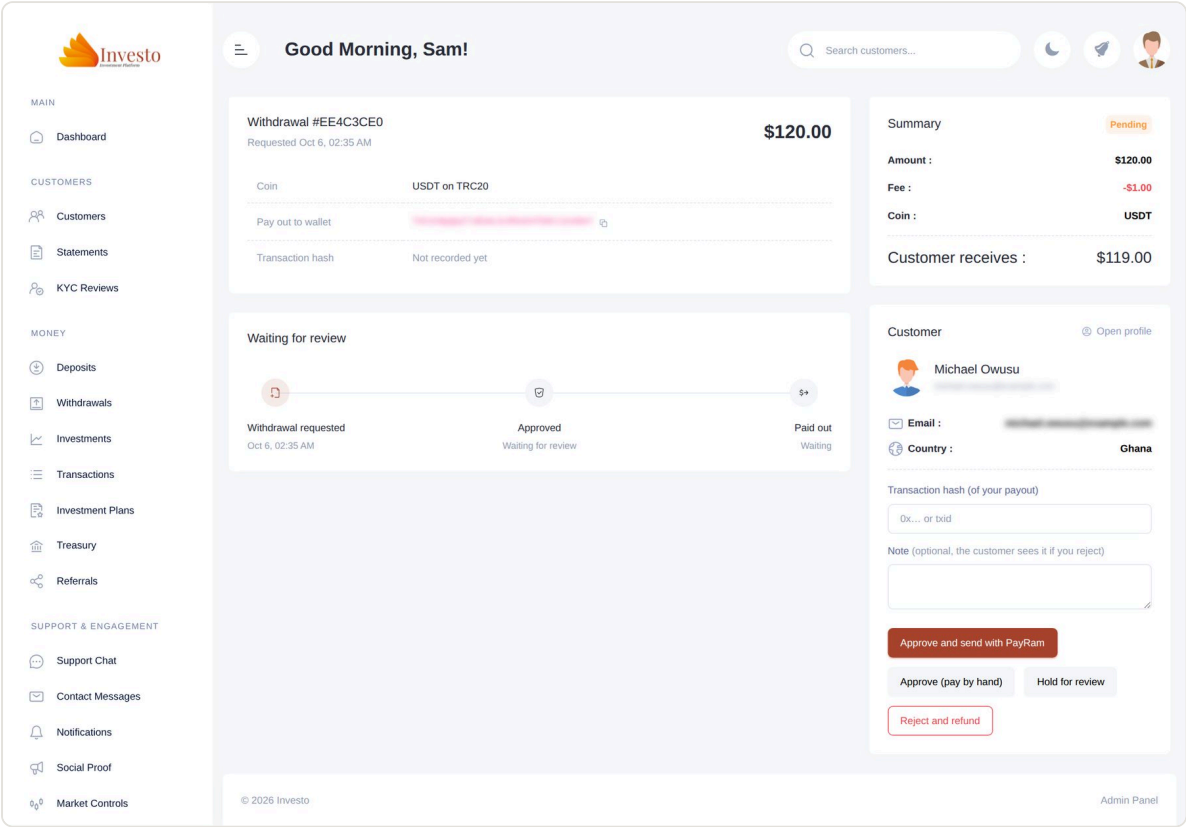


Figure 15. A new withdrawal request.

Open the withdrawal. The left side shows the amount, the network and the customer's wallet address. The **Summary** shows the fee and what the customer receives. Then choose one of these:

Button	What it does
Approve and send with PayRam	Approves the request and asks PayRam to send the USDT from your PayRam payout wallet. When PayRam reports it as sent, the withdrawal completes by itself with the transaction hash.
Approve (pay by hand)	Approves the request. You then send the USDT yourself from your own wallet, paste the transaction hash and click **Mark as paid** .
Hold for review	Moves it to Review so you or a colleague can look into it later.
Reject and refund	Rejects the request and puts the money back in the customer's available balance. Write a note first; the customer sees it.

1. Check the customer's profile if anything looks unusual, for example a brand new account asking for a large amount.
2. Check that the wallet address matches the network. TRC20 addresses start with **T**. ERC20 addresses start with **0x**.

3. Click **Approve and send with PayRam**.
4. The page shows the PayRam payout status. Click **Check payout status** to refresh it.

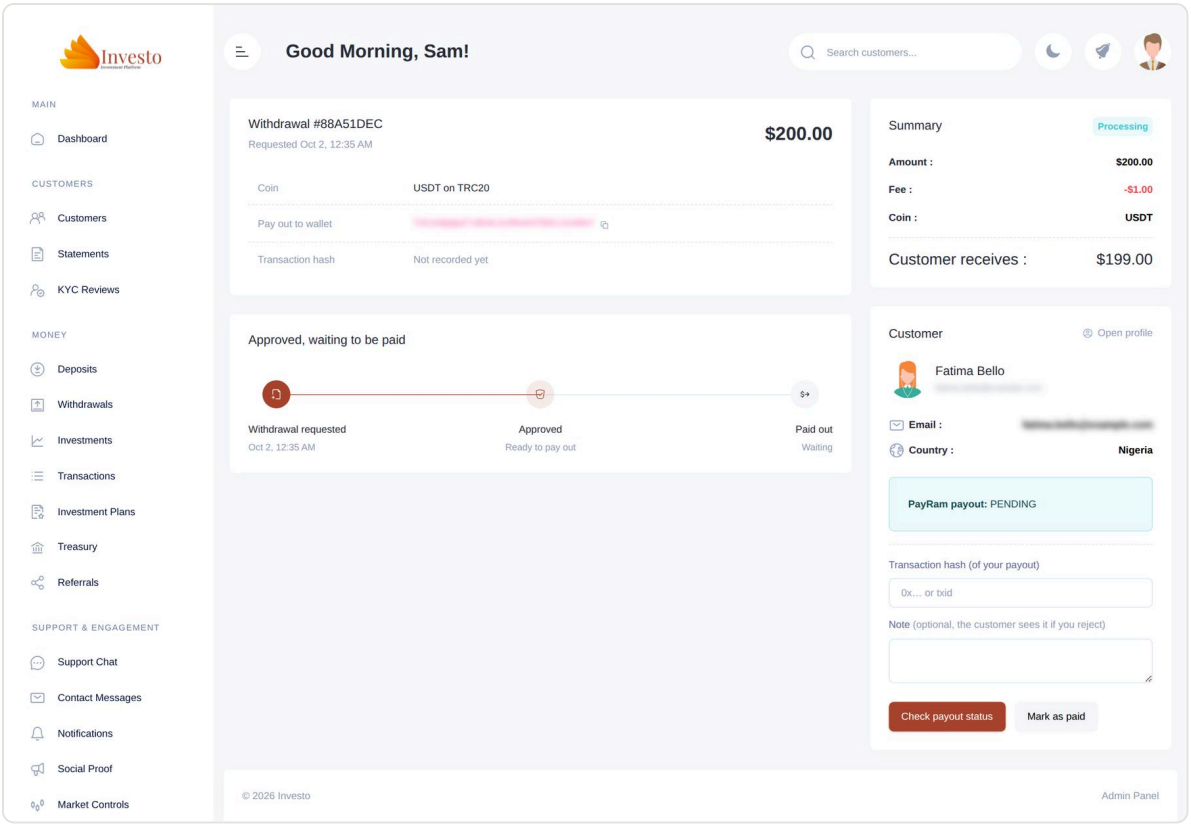


Figure 16. A withdrawal being paid through PayRam.

IMPORTANT

If PayRam reports a failure, the withdrawal stays in Processing and the reason is shown. You can try **Send with PayRam again**, pay by hand, or reject and refund. If PayRam did not answer at all, the panel blocks a second send until you check the status, so a customer is never paid twice.

TIP

PayRam can only send what is in your PayRam payout wallet. Keep it topped up with USDT, plus a little TRX (for TRC20) or ETH (for ERC20) to pay network fees.

SECTION 7

Investments and transactions

Investments

This page lists every plan a customer has bought, with the amount, the rate, what it has earned so far, and the start and end dates. Use the tabs to see Active, Completed, Paused or Cancelled plans.

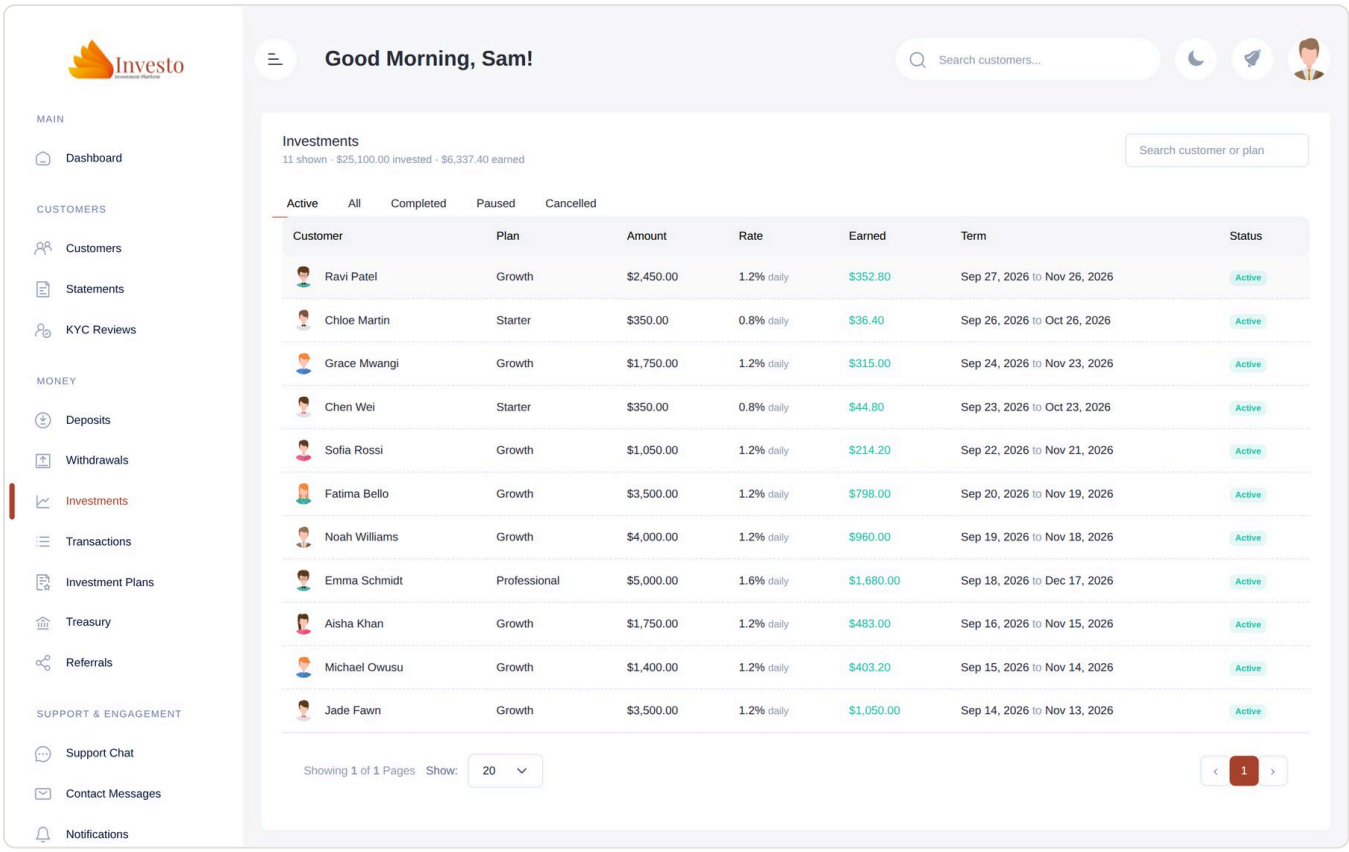


Figure 17. All customer investments.

How earnings work

- Earnings grow once a day while a plan is active. They show on the customer's My Investments page as "Not yet moved".
- The customer presses **Move to balance** to move earnings into their available balance. They can do this once the earnings reach the plan's minimum withdrawal amount.
- When a plan ends, the original amount and any earnings not yet moved go back to the customer's available balance by themselves.
- A customer can end a plan early. Before the halfway point they get their money back with no earnings. After the halfway point they get their money back plus half of the earnings. The customer sees the exact amount before they confirm.

Transactions

Every money movement on the platform appears here: deposits, withdrawals, investments, daily earnings, bonuses, referral rewards and manual adjustments. Use the tabs to filter by type and the search box to find a

customer or a reference.

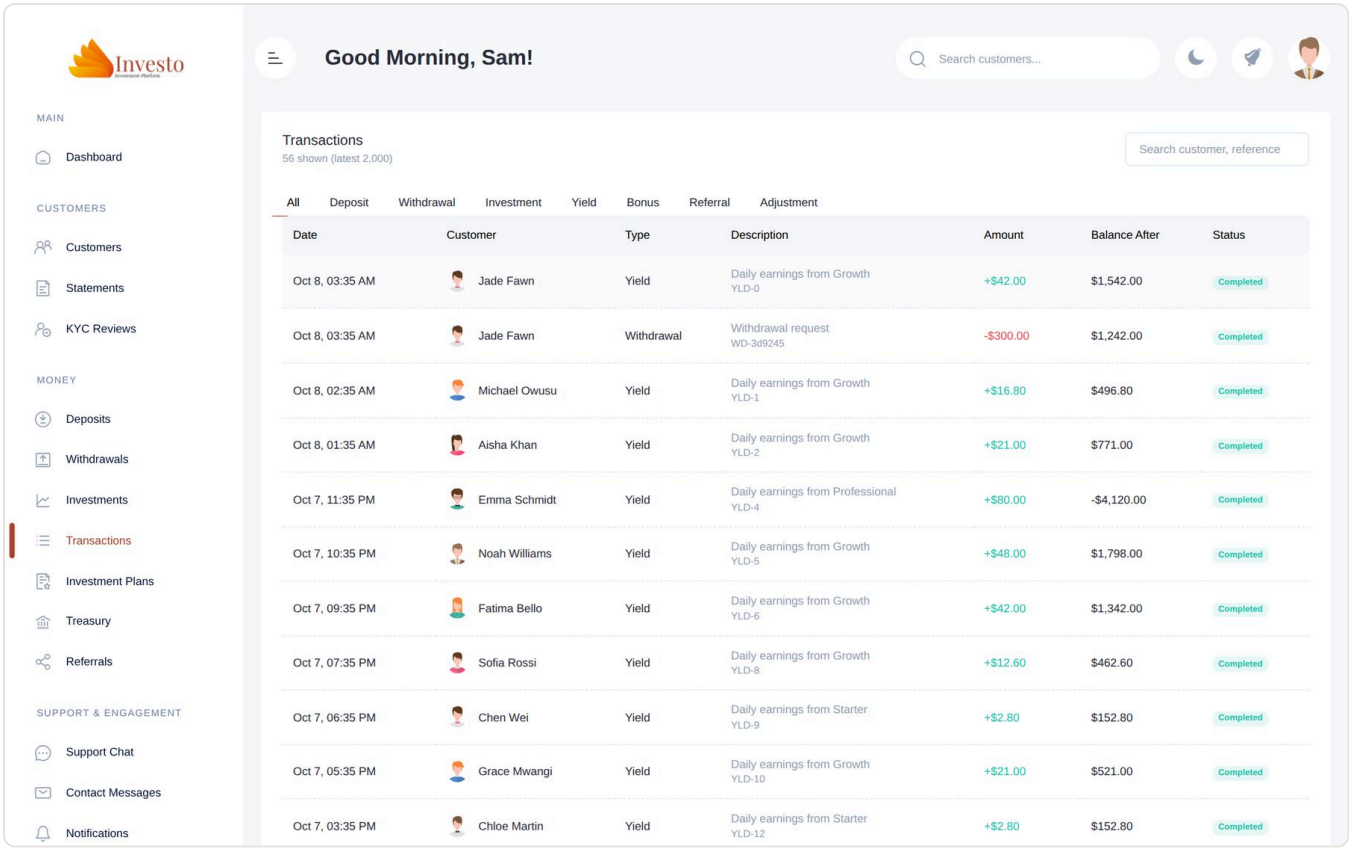


Figure 18. The transaction ledger.

SECTION 8

Investment plans

Plans are the products customers buy. Active plans appear on your landing page and on the customer Plans page as soon as you save them.

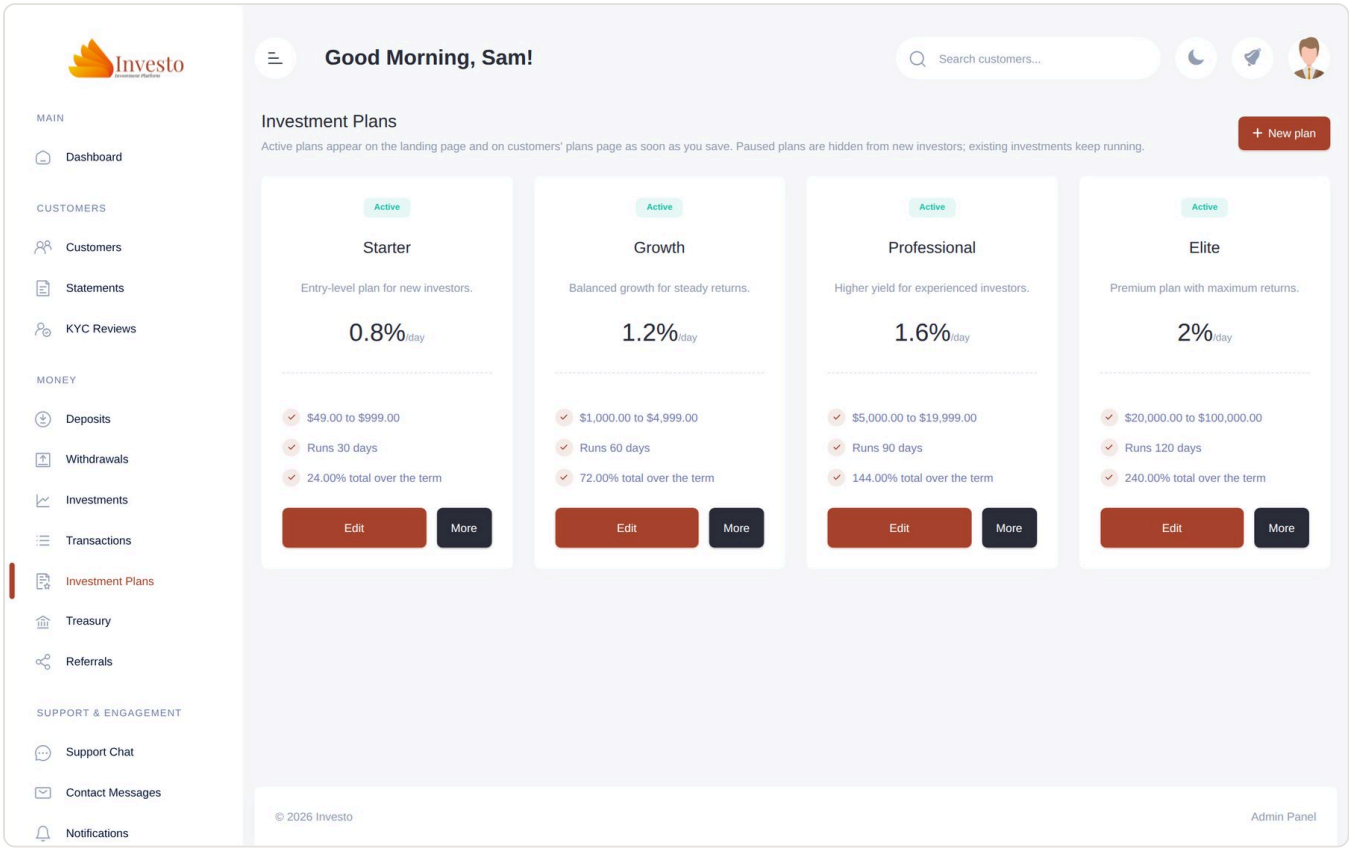


Figure 19. The Investment Plans page.

Creating or editing a plan

1. Click **New plan**, or **Edit** on an existing plan.
2. Fill in the fields described below.
3. Click **Save changes**.

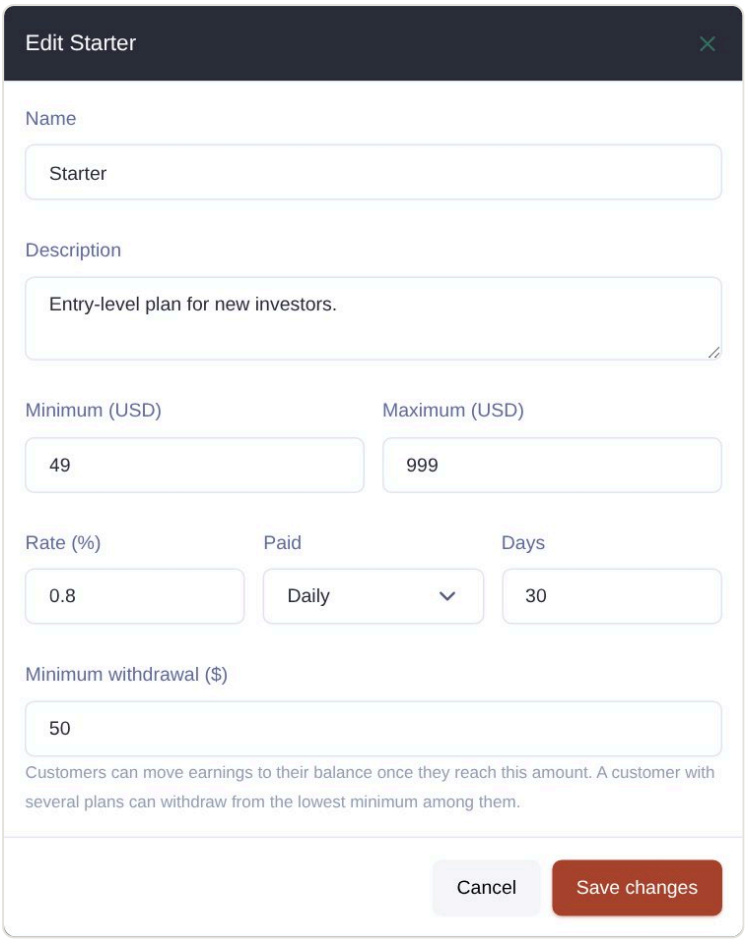


Figure 20. Editing a plan.

Field	What it means
Name and Description	What customers see on the plan card.
Minimum and Maximum (USD)	The smallest and largest amount a customer can put into this plan.
Rate (%) and Paid	The return and how often it is counted: daily, weekly or monthly. For example 1.2% daily.
Days	How long the plan runs.
Minimum withdrawal ($)	Earnings must reach this amount before the customer can move them to their balance. It is also the smallest withdrawal for customers in this plan.

Use **More** on a plan card to **Pause**, **Activate** or **Duplicate** it. A paused plan is hidden from new customers, but plans that customers already bought keep running. Duplicate makes a copy you can edit into a new plan.

> **GOOD TO KNOW**
> Changing a plan's rate or length only affects new investments. Customers who already invested keep the rate and length they signed up for.

SECTION 9

Treasury

Treasury shows the money side of the business and holds the limits for deposits and withdrawals.

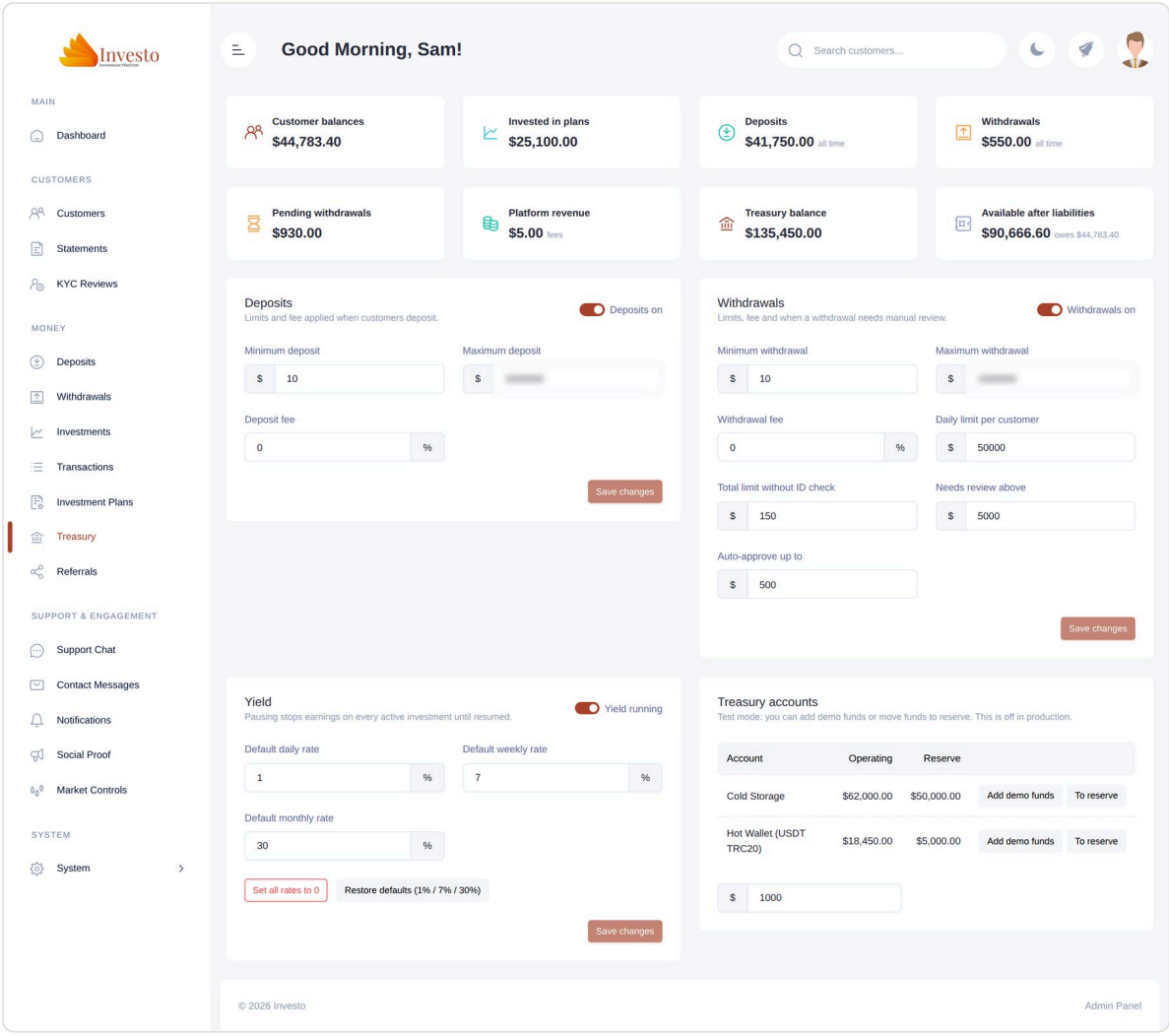


Figure 21. The Treasury page.

The cards at the top

These show customer balances, money invested in plans, total deposits and withdrawals, withdrawals waiting to be paid, platform revenue, the balance in your treasury accounts, and what is left after everything you owe customers.

Deposit and withdrawal limits

Setting	What it does
Deposits on	Turn off to stop all new deposits.
Minimum and maximum deposit	The smallest and largest deposit a customer can make.
Withdrawals on	Turn off to stop all new withdrawal requests.

Setting	What it does
Minimum and maximum withdrawal	The general limits. The plan minimum withdrawal applies on top of this.
Withdrawal fee	A percentage taken from each withdrawal.
Daily limit per customer	The most one customer can withdraw in a day.
Total limit without ID check	How much a customer can withdraw in total before their ID is approved. The default is $150.

Change a value and click **Save changes** under that card.

Treasury accounts

Treasury accounts are your own record of where the business money sits, for example a hot wallet and cold storage. Use **Add demo funds** or **To reserve** to update them. These numbers are for your own tracking and do not move real crypto.

SECTION 10

Referrals

Every customer has a referral code and link. When someone joins with it, they are linked to the person who invited them.

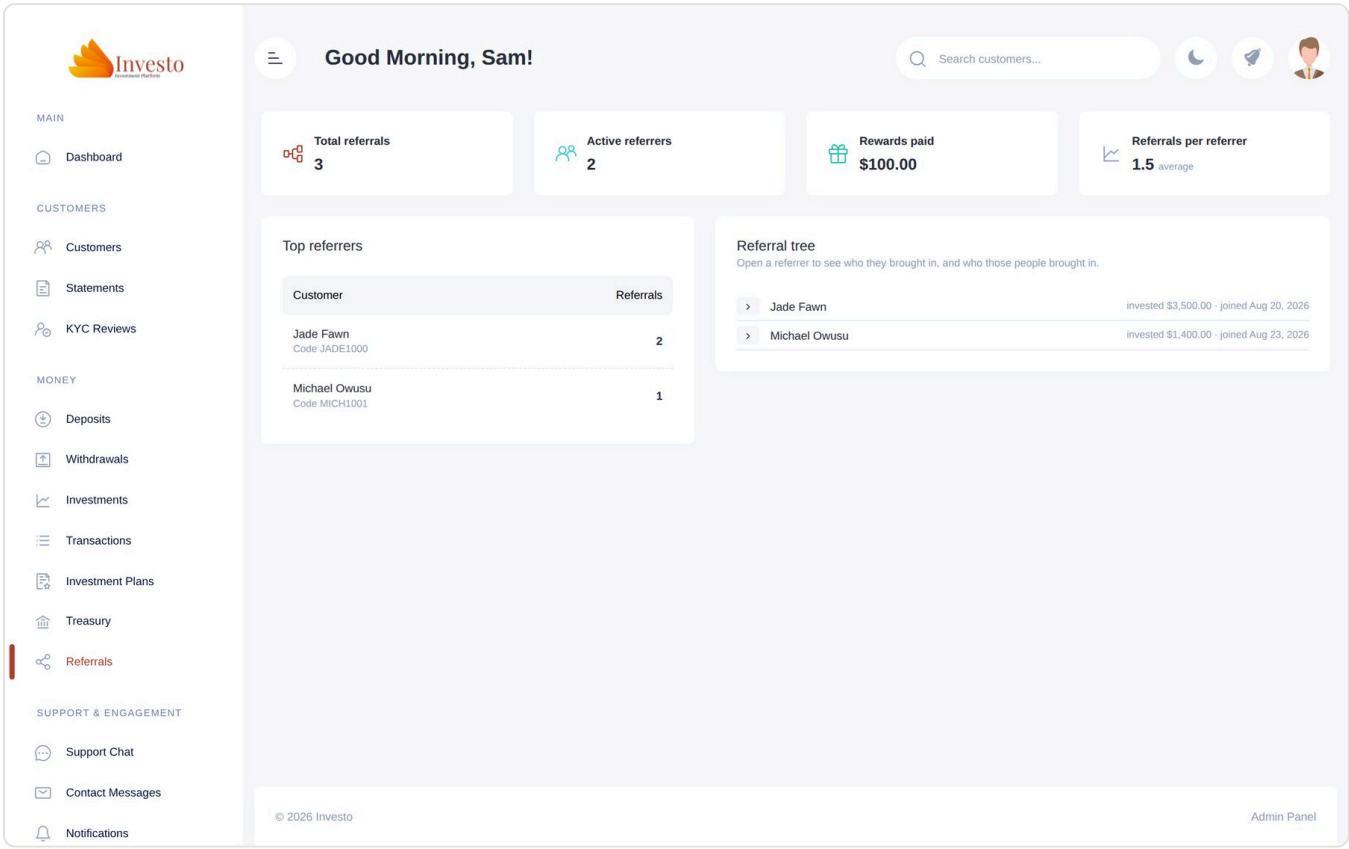


Figure 22. The Referrals page.

- **Top referrers** lists the customers who brought in the most people.
- **Referral tree** shows who invited whom. Click a referrer to see the people they brought in, how much each invested, and when they joined.
- The cards at the top show total referrals, how many customers have referred someone, and rewards paid.

SECTION 11

Support, messages and notifications

Support Chat

Customers open a chat from the Support page of their dashboard. Each chat has a subject and a category such as Deposit or Withdrawal.

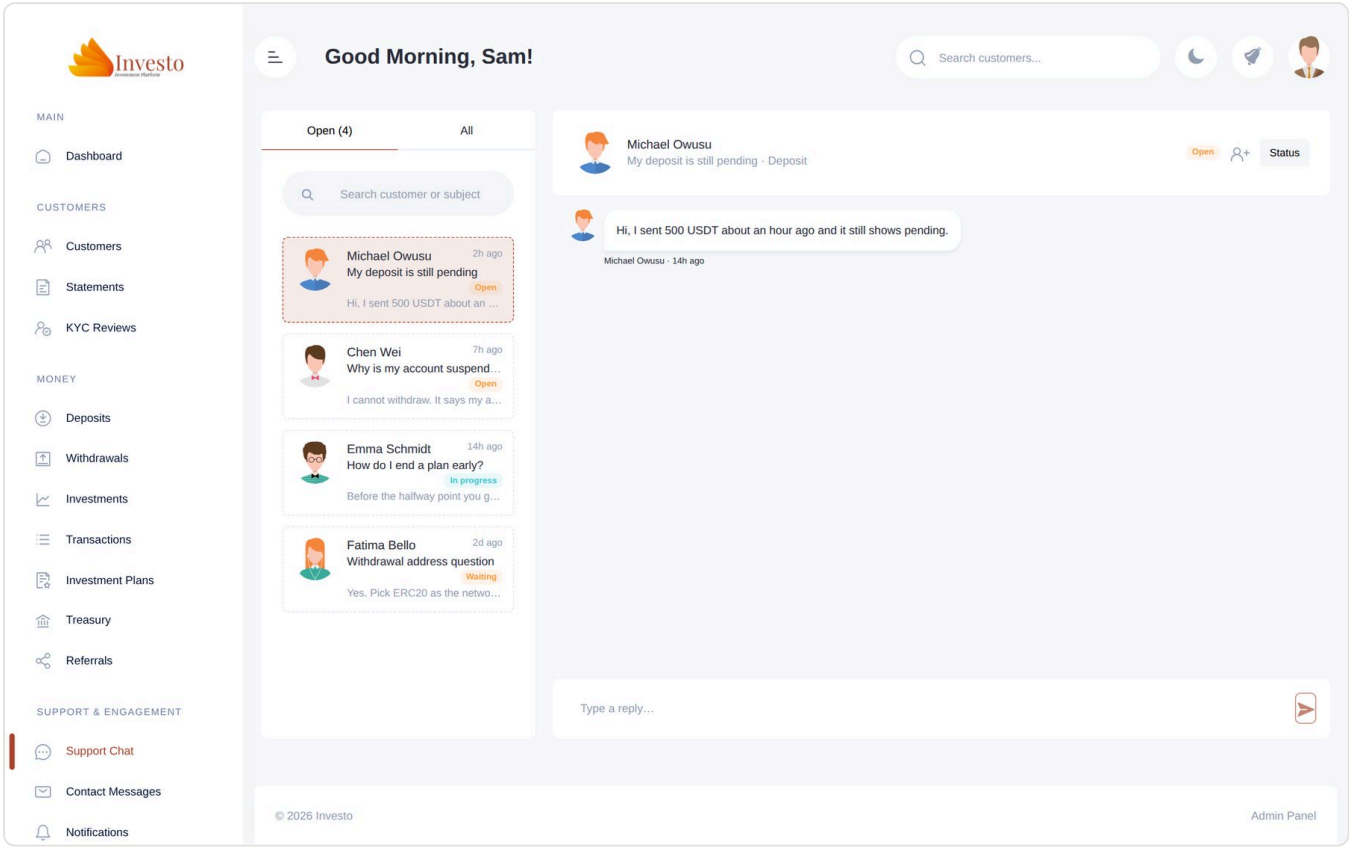


Figure 23. Support Chat with a conversation open.

1. Open **Support Chat**. The **Open** tab lists chats waiting for an answer, newest first.
2. Click a chat to read it.
3. Type your answer at the bottom and press Enter or the send button. The customer sees it at once.
4. Use the **Status** button at the top of the chat to mark it In progress, Waiting for the customer, Resolved or Closed. Use the person button to assign the chat to an admin.

Contact Messages

These come from the contact form on your public website, often from visitors without an account. Click a message to read it. Mark it as Read, Responded or Closed, or click **Reply by email** to answer from your email app.

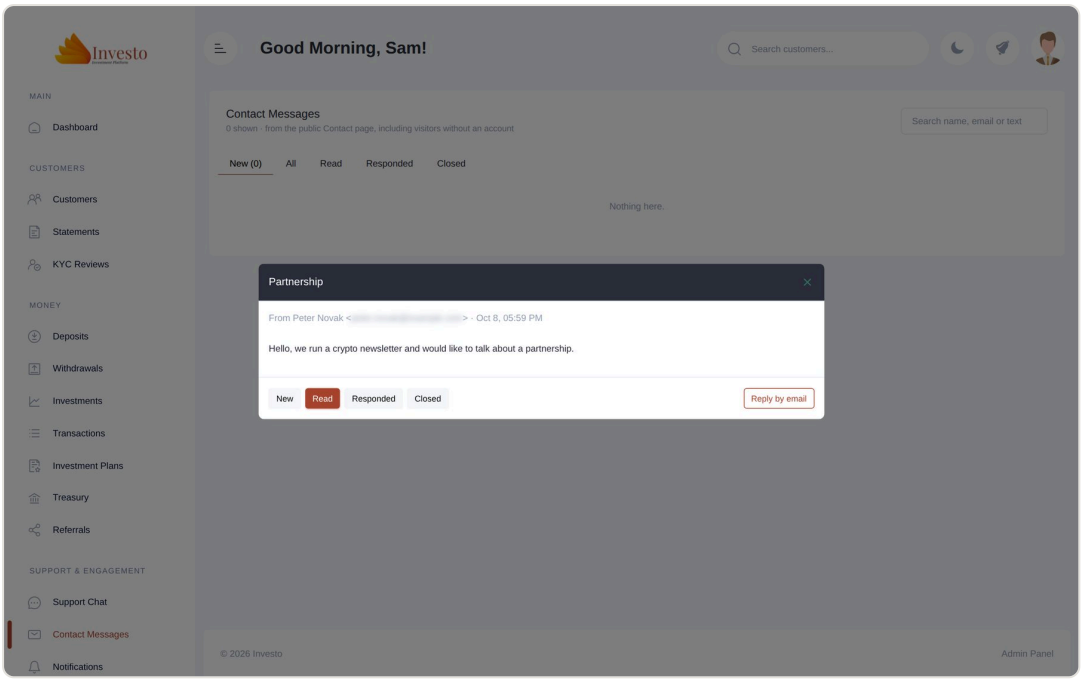


Figure 24. A contact message.

Notifications and announcements

Use this page to tell customers something. There are two tools.

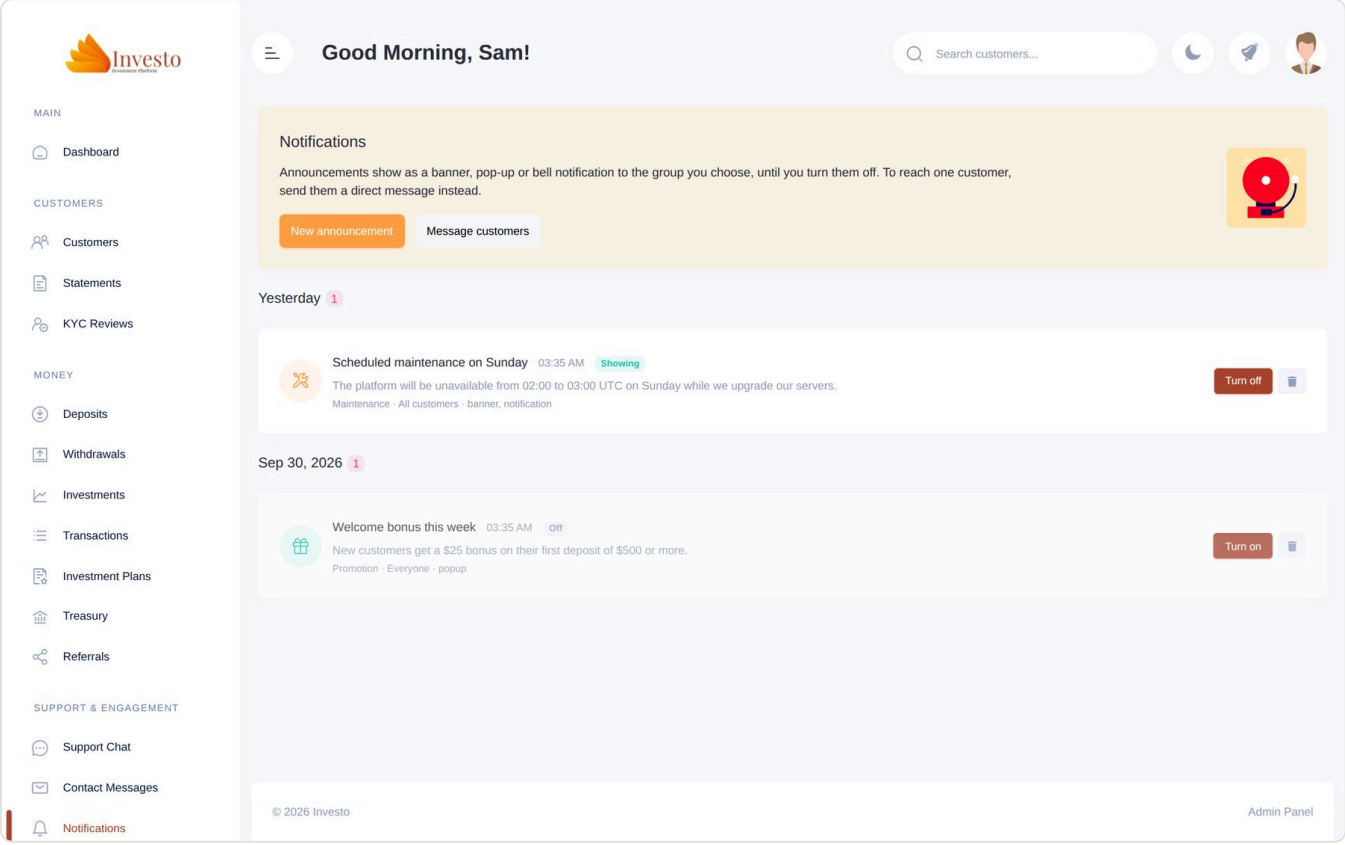


Figure 25. The Notifications page.

New announcement

An announcement is shown to a group of people until you turn it off.

1. Click **New announcement**.
2. Write a **Title** and a **Message**.
3. Choose the **Type**: Important notice, Maintenance notice, Promotion or System update.
4. Choose **Who sees it**: All customers, everyone including visitors, admins, or one admin role.
5. Tick how it is shown: a **Banner** at the top of the dashboard, a **Pop-up**, or the **Notification bell**. You can tick more than one.
6. Click **Publish**. Use **Turn off** on the list when it is no longer needed.

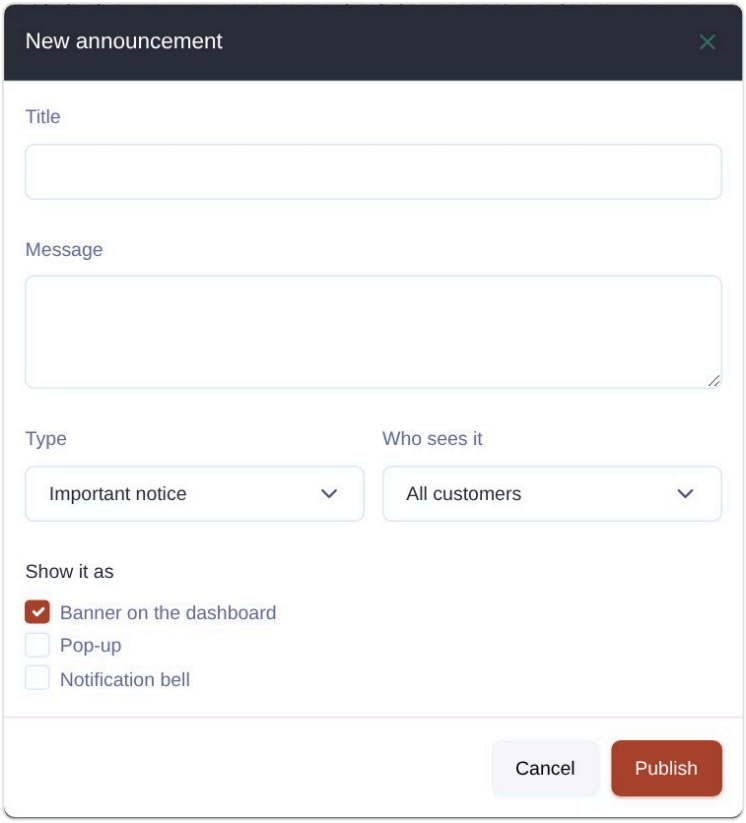


Figure 26. Writing an announcement.

Message customers

Click **Message customers** to send a direct message. Choose all customers or one customer, write a title and a message, and click **Send**. It appears in their notification bell and on their Notifications page.

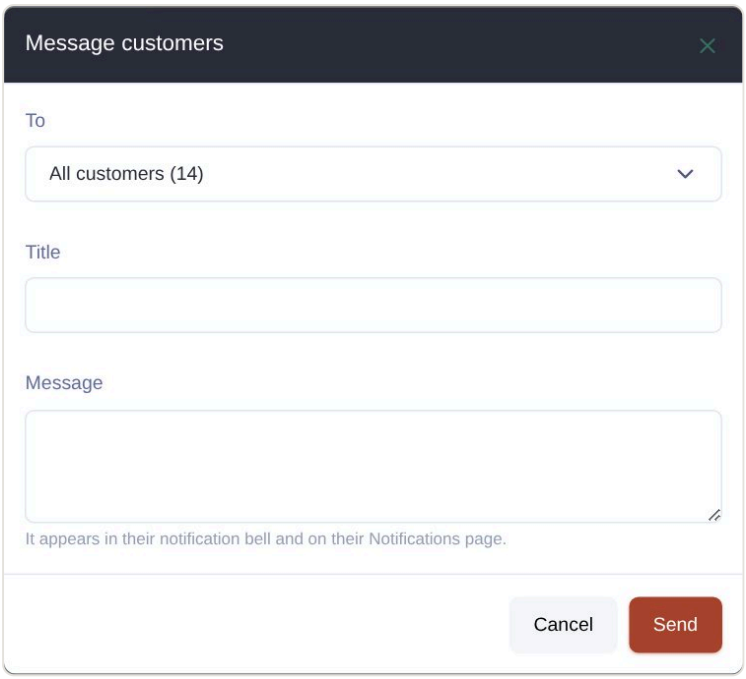


Figure 27. Sending a direct message.

SECTION 12

Social proof

Social proof means the small pop-ups in the corner of the screen that show activity, like "Daniel A. from Austin, US just deposited $500" or "Bitcoin moved lower today". They make the platform feel busy and alive.

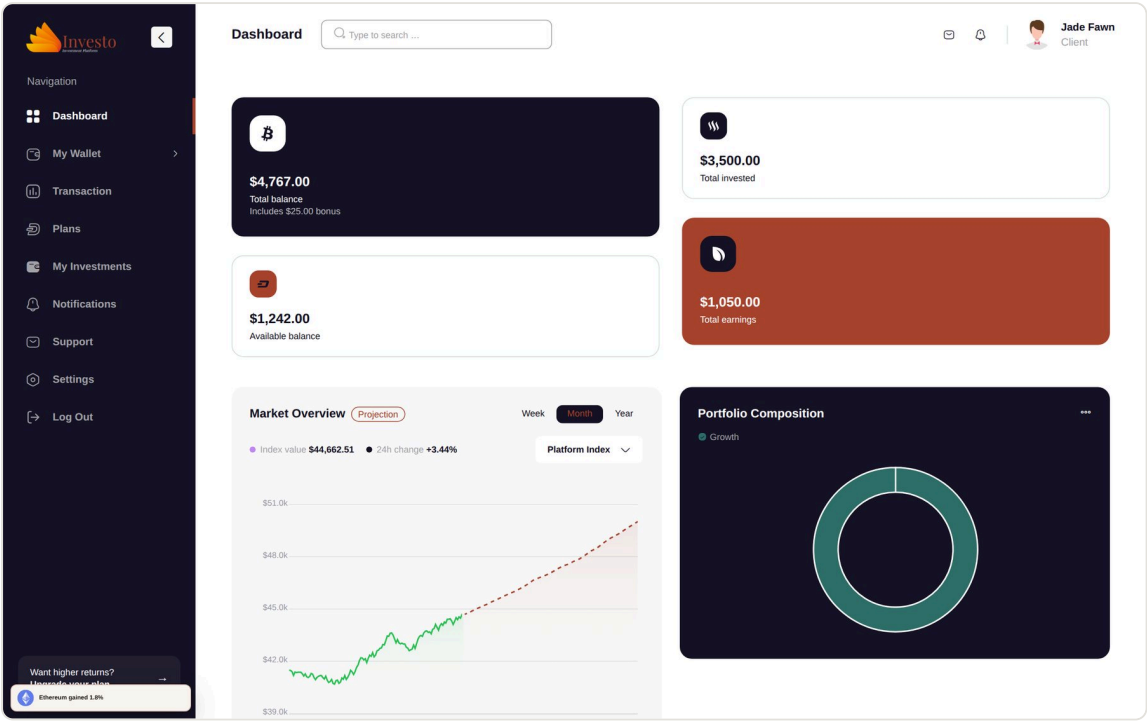


Figure 28. A pop-up in the bottom left corner of a customer's dashboard.

Two kinds of pop-up

This is the most important thing to understand on this page. There are two separate pop-up systems, and you control them on different tabs.

	Demo ticker	Real activity
What it shows	Lines you write yourself. They are examples, not real people.	Things real customers just did, like a confirmed deposit or a new account.
Where you set it up	The **Demo ticker** tab.	The **Real activity** tab.
Where it shows	Your public website and the customer dashboard.	Your public website and the customer dashboard.
When it shows	All the time while it is on, one line after another.	Only when something real happens.
Good for	A new platform with few customers, demos and marketing.	A busy platform with real activity.

You can run both at the same time, or only one.

The demo ticker, step by step

Open **Social Proof**. The page opens on the **Demo ticker** tab.

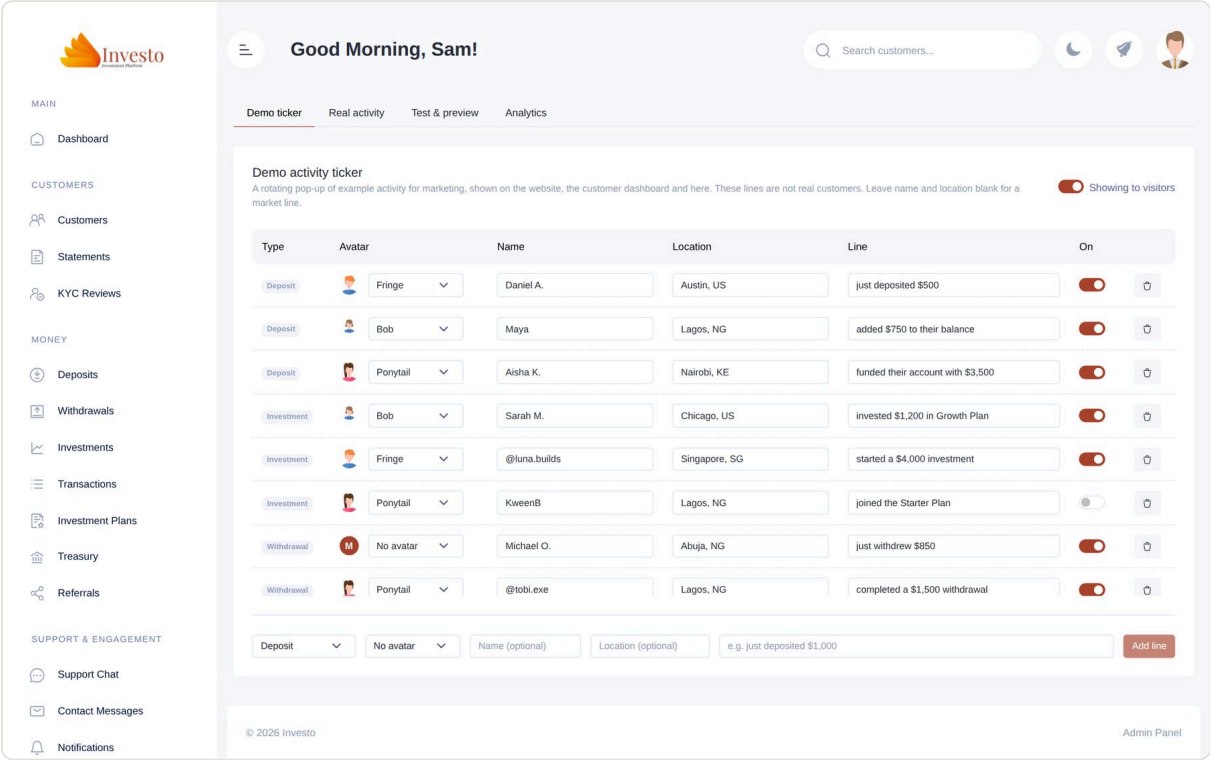


Figure 29. The Demo ticker tab.

Turning it on and off

The switch in the top right corner of the card turns the whole ticker on or off. When it is on it says **Showing to visitors**. When it is off, no demo pop-ups show anywhere.

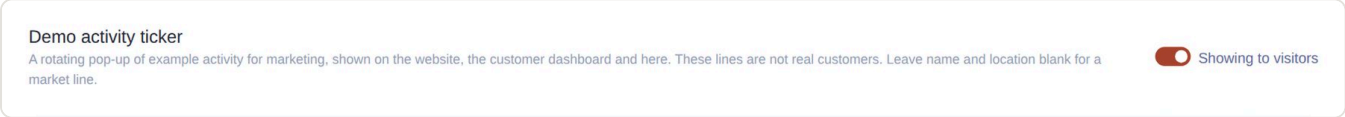


Figure 30. The on and off switch for the demo ticker.

Reading the table

Each row is one pop-up. The ticker shows the rows in order from top to bottom, then starts again.

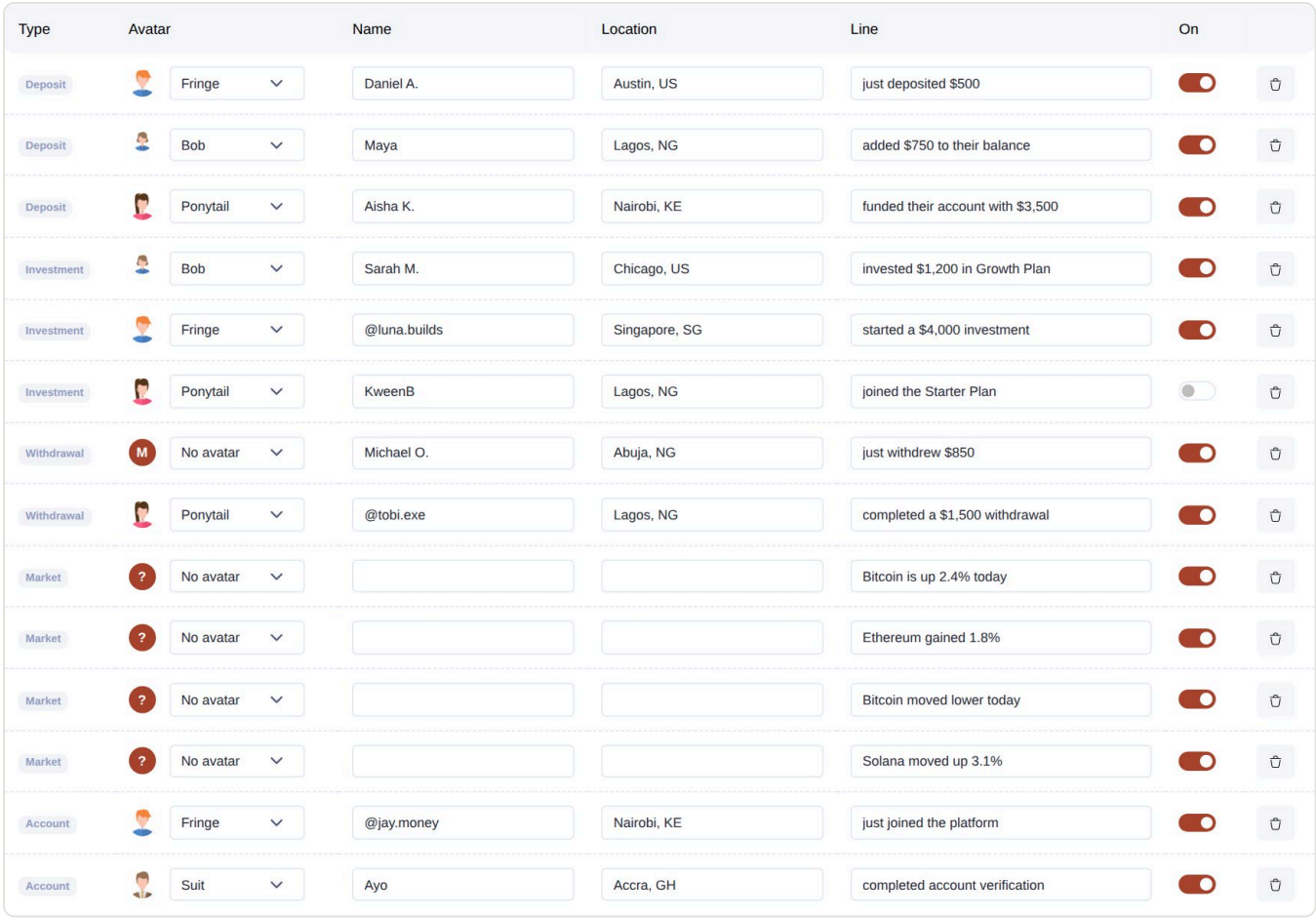


Figure 31. The ticker lines.

Column	What it does
Type	The kind of line: Deposit, Investment, Withdrawal, Market or Account. It is only a label to help you sort lines.
Avatar	The cartoon face shown on the left of the pop-up. Choose one from the list, or **No avatar** to show the first letter of the name instead.
Name	The name shown in bold, for example "Daniel A." or "@luna.builds". Leave it empty for market lines.
Location	Shown after the name as "from Austin, US". Optional.
Line	The main text, for example "just deposited $500".
On	Switch a line off to skip it without deleting it.
Bin icon	Deletes the line for good. The panel asks you to confirm.

Editing a line

1. Click into the Name, Location or Line box and change the text.
2. Click anywhere outside the box. The change saves by itself and a "Saved." message appears.
3. To change the avatar, pick a different one from the list. It saves at once.

Adding a person line

1. Scroll to the row at the bottom of the card.
2. Choose the type, for example **Deposit**.
3. Choose an avatar.
4. Type a name and, if you want, a location such as "Accra, GH".
5. Type the line, for example "just deposited $2,000".
6. Click **Add line**. It joins the end of the rotation.

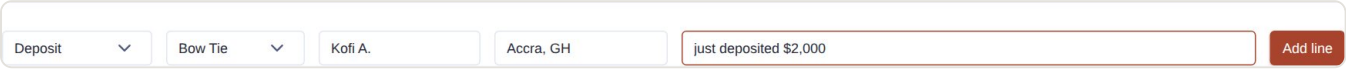


Figure 32. Adding a person line.

Adding a market line with a coin logo

Market lines talk about a coin, not a person. When a market line names a known coin, the pop-up shows that coin's logo where the avatar would be.

1. Choose the type **Market**.
2. Leave the avatar, name and location empty.
3. Type the line and include the coin's name or symbol, for example "Ethereum is up 4% this week" or "BTC moved lower today".
4. Click **Add line**.

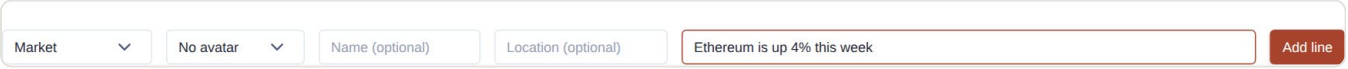


Figure 33. Adding a market line.

Figure 34. How a market line looks to customers, with the Ethereum logo.

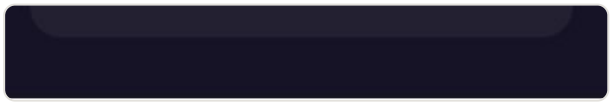


Figure 35. How a person line looks to customers.

Coins that get a logo: Bitcoin (BTC), Ethereum (ETH), Solana (SOL), XRP, Tether (USDT), BNB, Dogecoin (DOGE), Cardano (ADA), Litecoin (LTC), Tron (TRX), USD Coin (USDC), Polkadot (DOT), Polygon (MATIC), Avalanche (AVAX), Chainlink (LINK) and Gold (PAX Gold). A market line about any other coin shows a plain circle instead.

How the rotation works

- Each line shows for 6 seconds, then there is an 8 second gap before the next one.
- The rotation continues where it left off when a visitor moves to another page, so they do not see the same first line on every page.
- The pop-up appears in the corner you choose under **Position** on the Real activity tab.

> **TIP**
> Write lines that sound natural and mix the types. Ten to twenty lines with different names, places and amounts feel real. Avoid huge round numbers on every line.

Real activity pop-ups

Open the **Real activity** tab. These pop-ups are made from genuine events on your platform. Nothing here is made up.

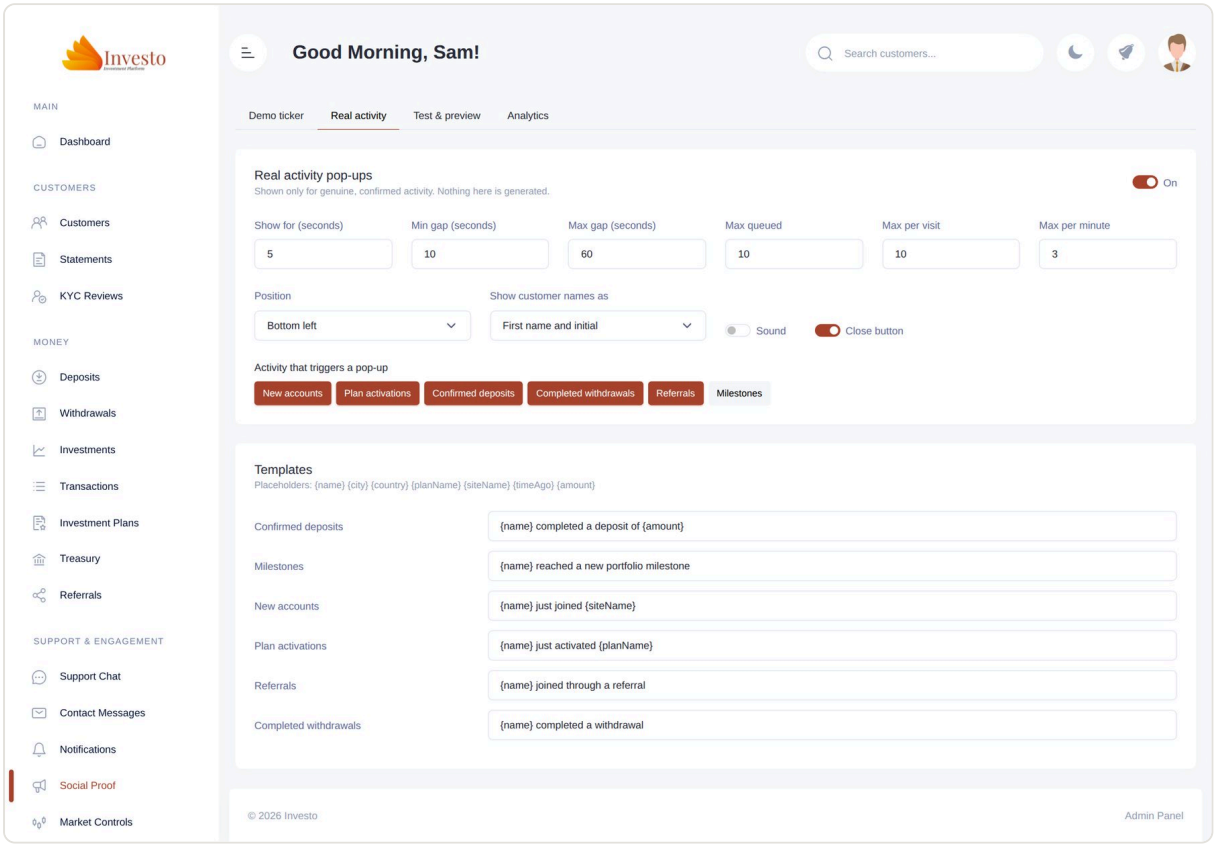


Figure 36. The Real activity tab.

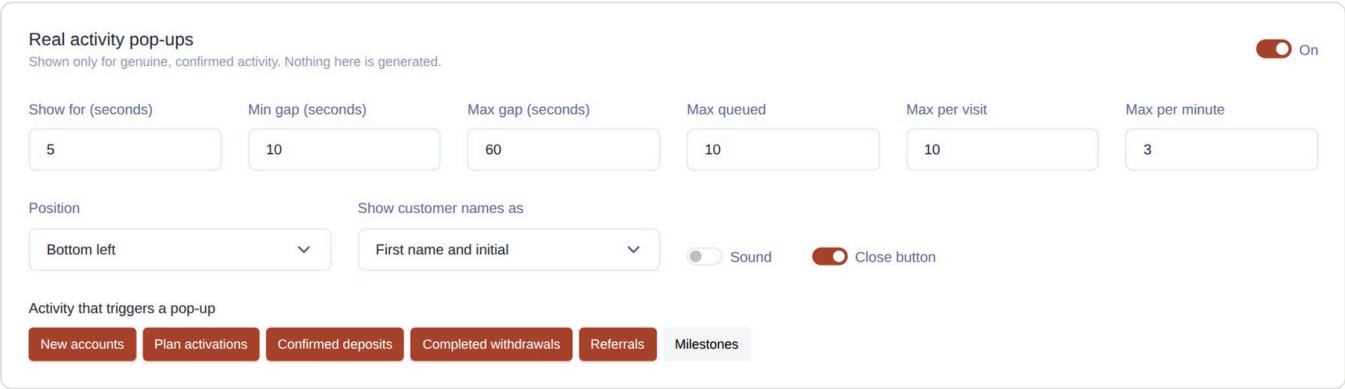


Figure 37. Real activity settings.

Each setting explained

Setting	What it does
On / Off switch	Turns real activity pop-ups on or off.
Show for (seconds)	How long each pop-up stays on screen.
Min gap and Max gap (seconds)	The wait between two pop-ups is a random time between these two numbers, so they do not come at a fixed beat.
Max queued	If a lot happens at once, only this many pop-ups wait in line to be shown.
Max per visit	The most pop-ups one visitor sees in one visit.
Max per minute	A safety limit so the screen never fills up.
Position	Bottom left or bottom right. This also moves the demo ticker.
Show customer names as	**First name only** ("Michael"), **First name and initial** ("Michael O."), or **Anonymous** ("A member").
Sound	Plays a soft sound with each pop-up.
Close button	Shows a small x so visitors can close a pop-up.
Activity that triggers a pop-up	Click the types to turn them on (colored) or off (grey): New accounts, Plan activations, Confirmed deposits, Completed withdrawals, Referrals and Milestones.

Number fields save when you click outside the box. Switches and lists save at once.

> **CUSTOMER PRIVACY**
> Customers can turn off appearing in pop-ups, or choose a nickname, from their own Settings page. The platform always respects that choice.

Templates

A template is the sentence used for each kind of real activity. Placeholders in curly brackets are replaced with real details.

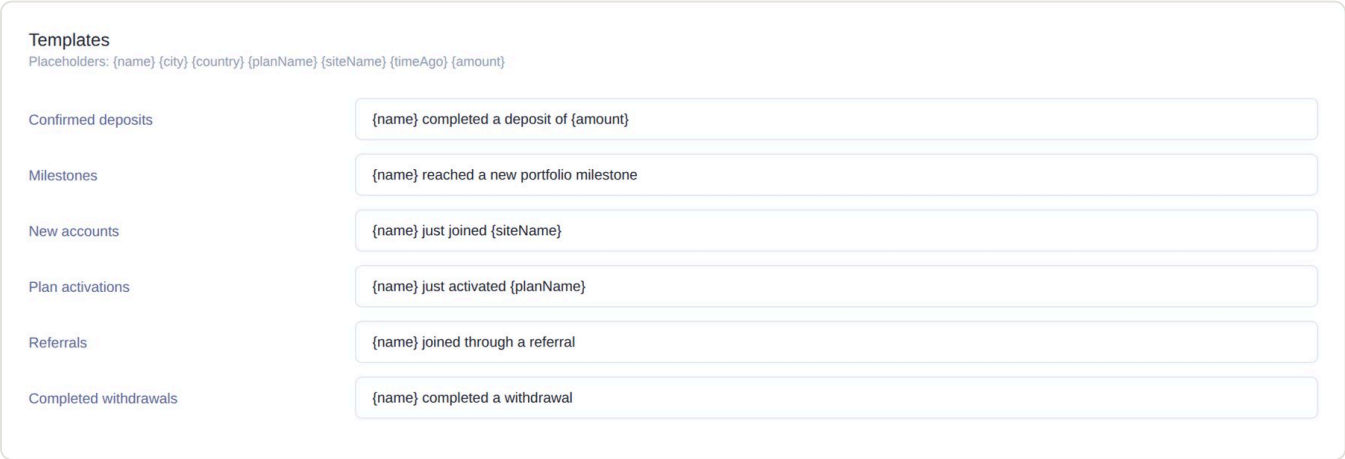


Figure 38. The templates.

Placeholder	Replaced with
{name}	The customer's name, shown the way you chose under "Show customer names as".
{amount}	The amount, for example $500.
{planName}	The plan, for example Growth Plan.
{siteName}	Your site name from Branding.
{city} and {country}	Where the customer is, if known.
{timeAgo}	How long ago it happened, for example "2 minutes ago".

1. Click into a template and change the words, for example "{name} just added {amount} to their account".
2. Click outside the box to save. A "Template saved." message appears.

Test and preview

Use this tab to see how a pop-up reads, or to send sample pop-ups to customer dashboards, for example while recording a demo video.

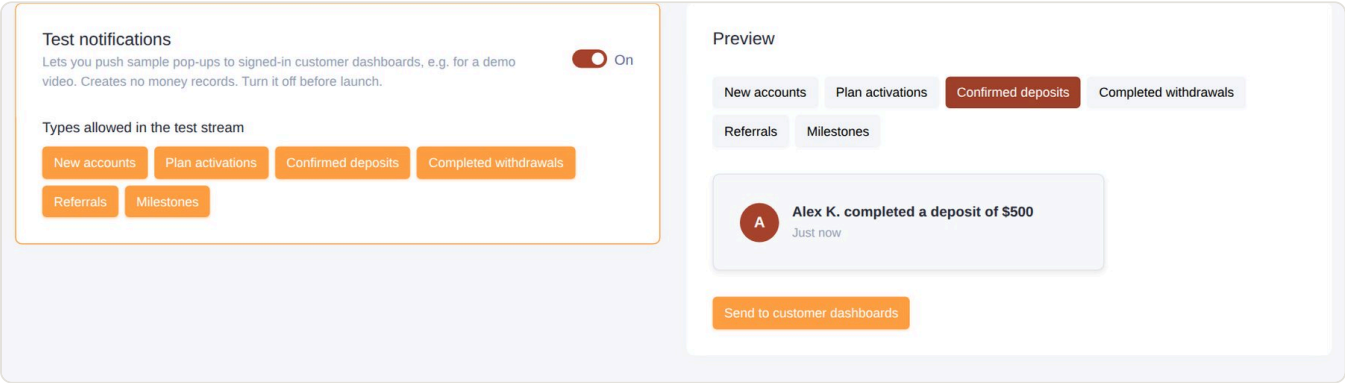


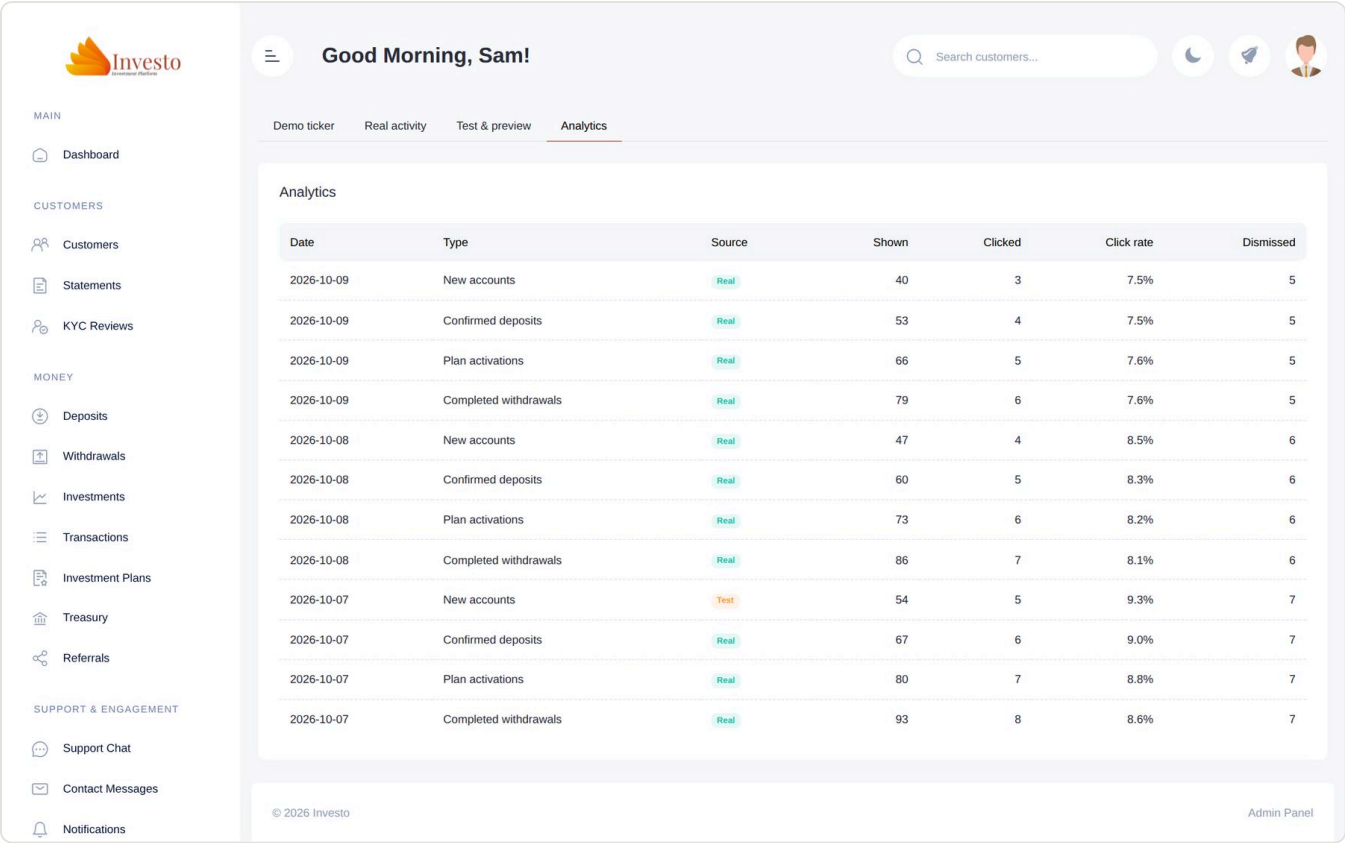
Figure 39. Test notifications and the preview.

1. Under **Preview**, click a type such as **Confirmed deposits**. The sample pop-up shows how the template reads.
2. To send samples to signed-in customers, turn on **Test notifications** on the left.
3. Choose which types are allowed in the test stream.
4. Pick a type in the Preview and click **Send to customer dashboards**.
5. Turn Test notifications off when you finish.

> **IMPORTANT**
> Test pop-ups do not create any money records. Still, turn test notifications off before you launch so customers never see sample names.

Analytics

The Analytics tab shows, per day and per type, how many pop-ups were shown, how many were clicked, the click rate, and how many were closed. The **Source** column tells you whether they were Real or Test.



Date	Type	Source	Shown	Clicked	Click rate	Dismissed
2026-10-09	New accounts	Real	40	3	7.5%	5
2026-10-09	Confirmed deposits	Real	53	4	7.5%	5
2026-10-09	Plan activations	Real	66	5	7.6%	5
2026-10-09	Completed withdrawals	Real	79	6	7.6%	5
2026-10-08	New accounts	Real	47	4	8.5%	6
2026-10-08	Confirmed deposits	Real	60	5	8.3%	6
2026-10-08	Plan activations	Real	73	6	8.2%	6
2026-10-08	Completed withdrawals	Real	86	7	8.1%	6
2026-10-07	New accounts	Test	54	5	9.3%	7
2026-10-07	Confirmed deposits	Real	67	6	9.0%	7
2026-10-07	Plan activations	Real	80	7	8.8%	7
2026-10-07	Completed withdrawals	Real	93	8	8.6%	7

Figure 40. Social proof analytics.

Ready-made setups

A new platform with few customers

1. On the Demo ticker tab, keep or write 10 to 20 varied lines and turn the ticker on.
2. On the Real activity tab, turn real activity on too, with New accounts, Plan activations and Confirmed deposits selected.
3. Set Show customer names as **First name and initial**.

A busy platform

1. Turn the demo ticker off.
2. Keep real activity on, set Min gap to 20 and Max gap to 90 seconds, and Max per visit to 6.

Pop-ups feel too frequent

Raise **Min gap** and **Max gap**, lower **Max per minute**, and switch off a few demo lines.

SECTION 13

Market controls

Market Controls decide what the price charts look like on the customer dashboard, wallet and account pages. Read the first part of this section carefully. Once the ideas are clear, the controls are simple.

Three things you can control

	What it is	Who sees it	Where you set it
Platform Index	Your own index, a single number like $44,662 that moves up and down. It is the default chart customers see.	All customers	Market Controls, **Platform Index** tab
Live markets	Real coins such as Bitcoin and Ethereum, with live prices. You can also add a simulated pair. You can push any of these prices up or down.	All customers	Market Controls, **Live markets** tab
Projections	A dashed "what if" line on one customer's chart, labeled Projection.	One customer	The customer's profile

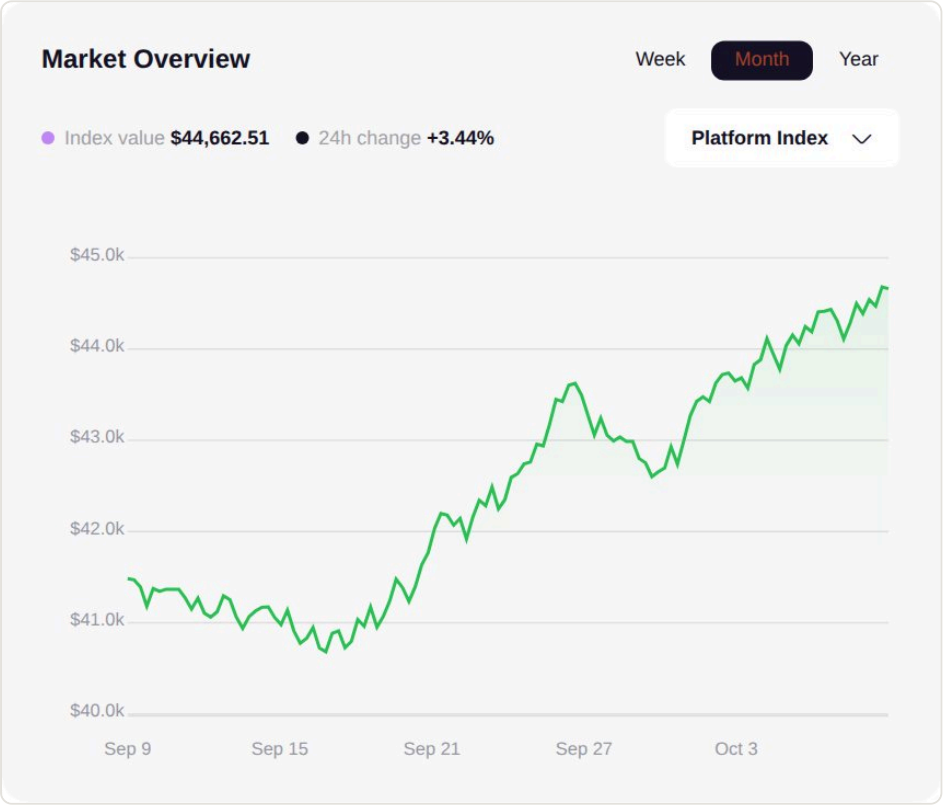


Figure 41. The Market Overview chart on a customer dashboard, showing the Platform Index.

Customers pick the chart with the menu on the right of the chart (Platform Index, Bitcoin, Ethereum and so on), and switch between Week, Month and Year.

The Platform Index

Open **Market Controls**. The page opens on the **Platform Index** tab.

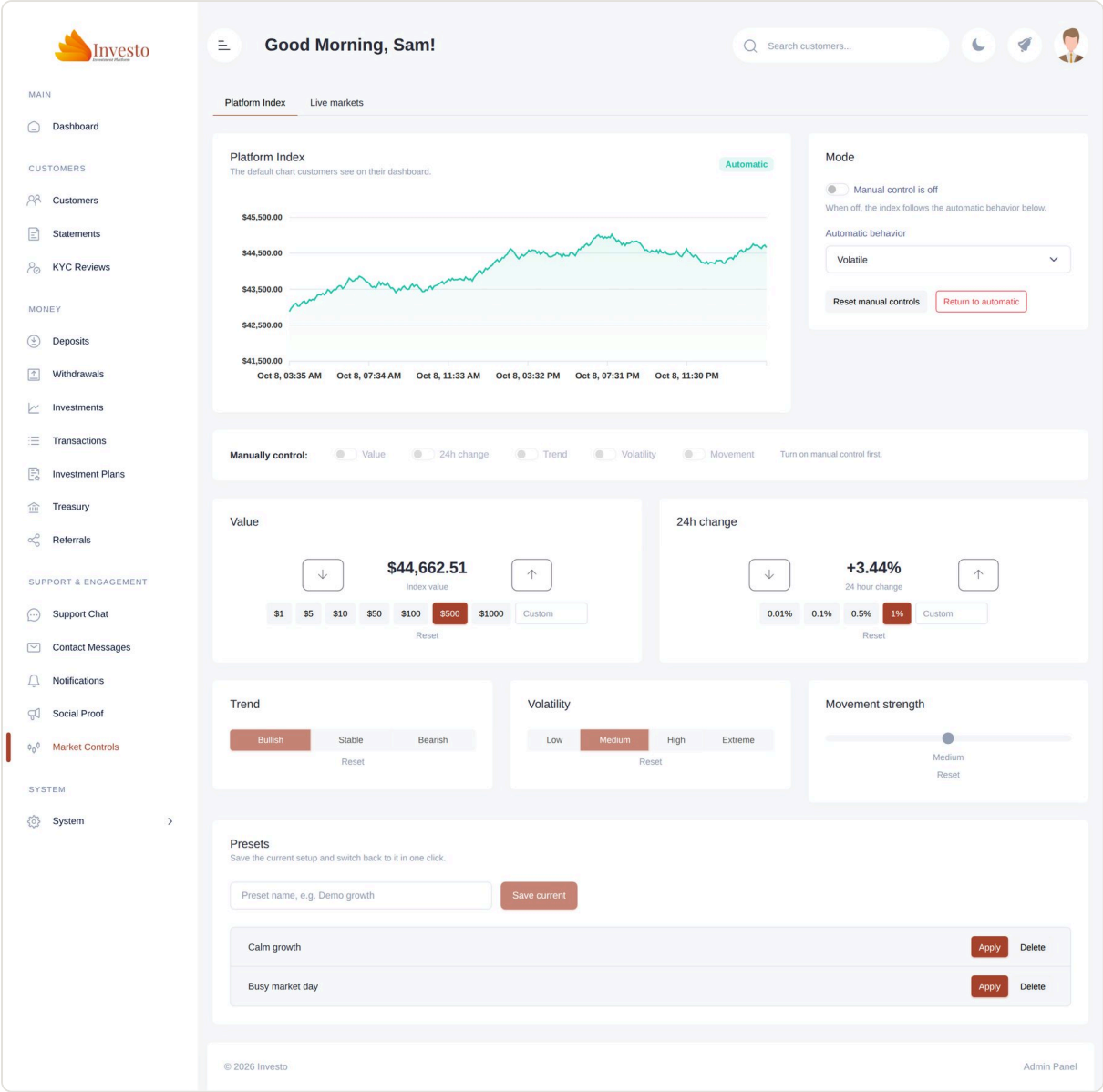


Figure 42. The Platform Index tab in automatic mode.

How the index moves

Every 5 minutes, all day and night, the platform takes one small step for the index. Each step is a little up or a little down, so the line always zig-zags like a real market. It keeps moving even when nobody is signed in, so the chart never has gaps.

The badge in the top right of the chart tells you who is in charge:

- **Automatic**: the index follows the automatic behavior you choose.
- **Manual control**: the index follows your manual settings.

Figure 43. The Platform Index chart, last 24 hours. Customers see the same line.

Automatic mode

In automatic mode you only choose a behavior. The index does the rest.

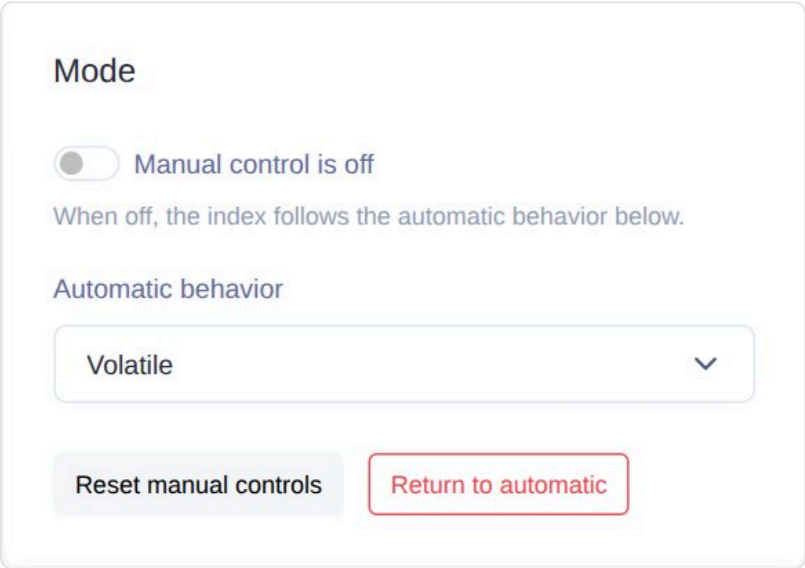


Figure 44. The Mode card in automatic mode.

Automatic behavior	What the line does
Stable	Small, calm moves around the current value.
Upward	Normal moves, with a gentle drift up over time.
Downward	Normal moves, with a gentle drift down over time.
Volatile	Bigger swings up and down, with no overall direction.
Random	Normal moves with no overall direction.

1. Make sure **Manual control is off**.

2. Choose a behavior in the **Automatic behavior** list. It is saved at once and the next 5 minute step uses it.

Manual control

Manual control lets you steer the index yourself. Turn it on with the switch at the top of the Mode card.

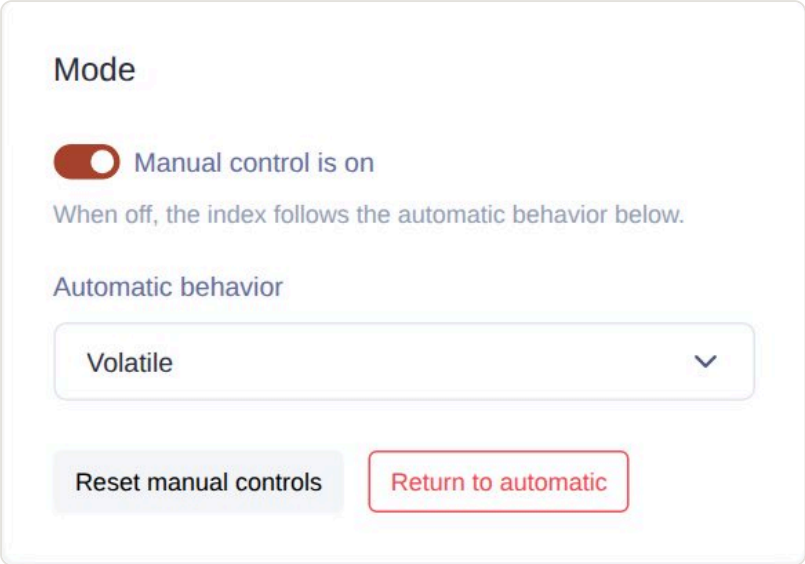


Figure 45. The Mode card with manual control on.

With manual control on, five more switches become available in the bar under the chart. Each switch hands one part of the index to you. Anything you leave off uses a calm default.

Figure 46. The five switches, all off.

Figure 47. The five switches, all on.

Switch	When it is on	When it is off
Value	The index stays close to the value you set with the arrows, wobbling around it.	The index moves freely from where it is.
24h change	Customers see the 24 hour change you set.	Customers see the real change from 24 hours ago.
Trend	Your trend decides the drift: bullish drifts up, bearish drifts down.	No drift (stable).
Volatility	Your volatility decides how big the zig-zags are.	Medium zig-zags.
Movement	Your movement strength scales every move.	Medium strength.

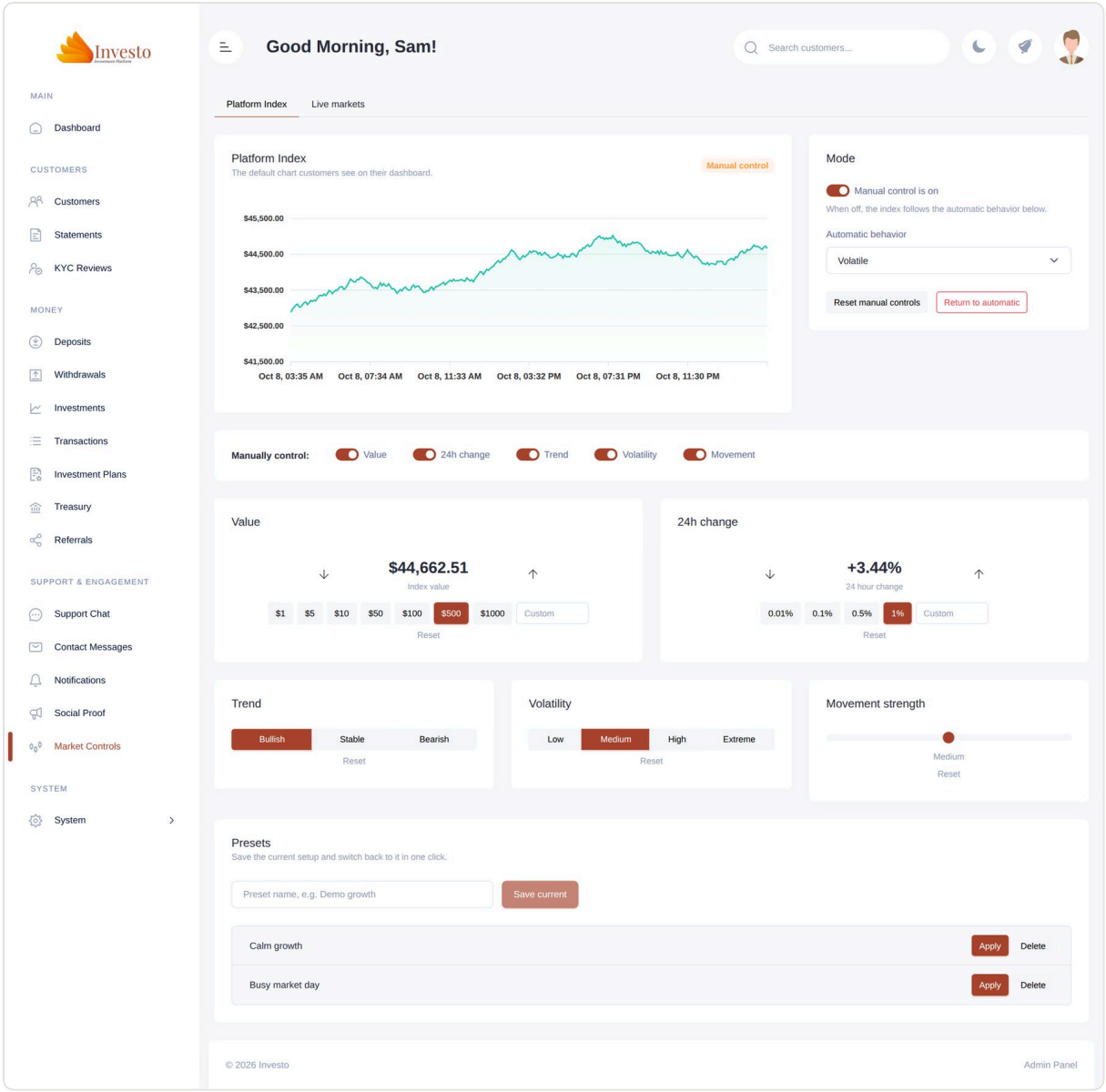


Figure 48. The Platform Index tab with manual control and all five switches on.

Value

The Value card shows the current index value. The arrows move it by the step you pick below.

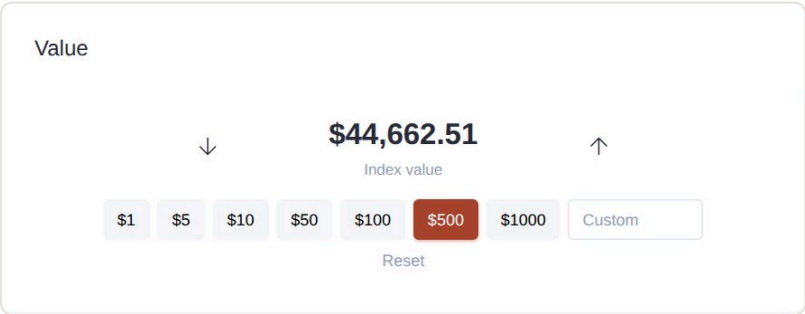


Figure 49. The Value card, before.

1. Make sure manual control and the **Value** switch are on.
2. Pick a step: $1, $5, $10, $50, $100, $500 or $1000, or type your own in **Custom**.

3. Click the up arrow to raise the index by one step, or the down arrow to lower it. Click as many times as you need.
4. Customers see the new value on their next chart load. From then on, the index keeps zig-zagging around your value. If Trend is bullish or bearish, your value itself slowly drifts that way.

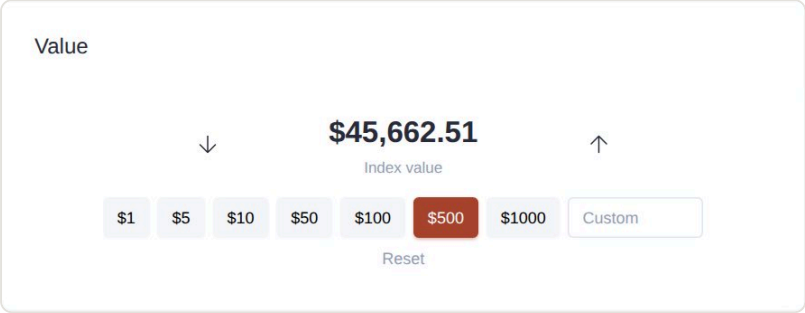


Figure 50. The same card after clicking the up arrow twice with a $500 step.

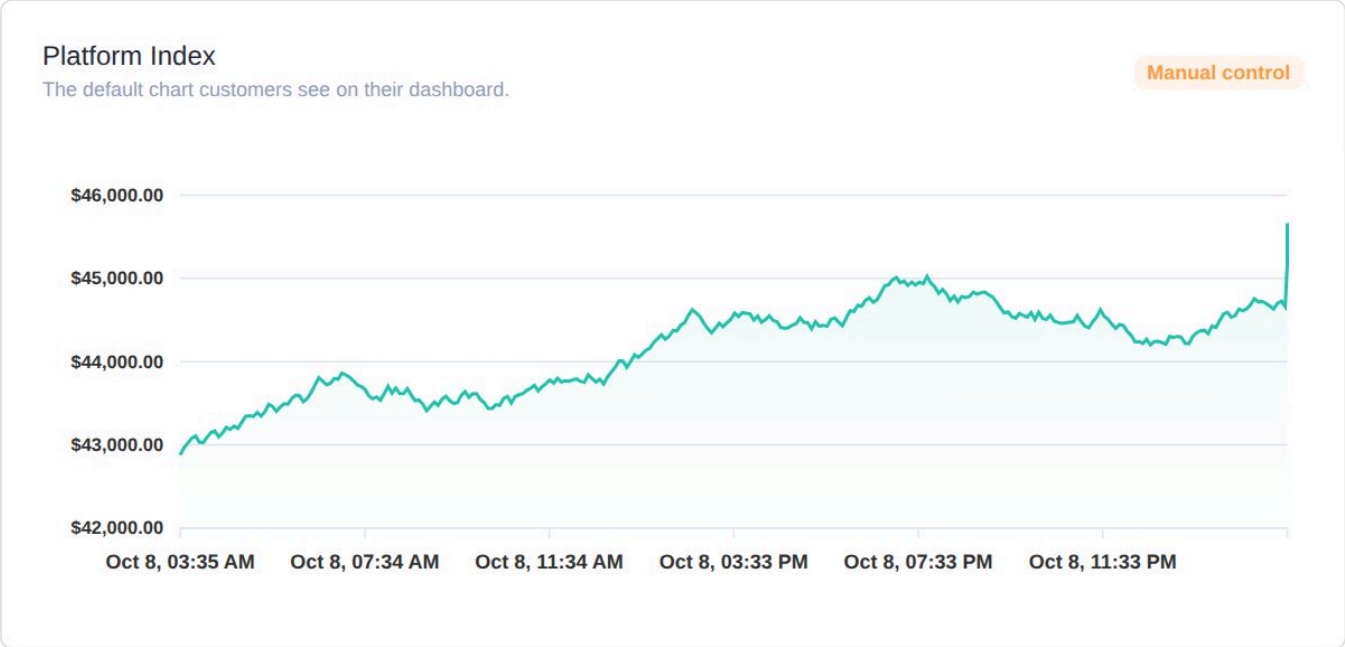


Figure 51. The chart after the change. The line jumps to the new level, then keeps zig-zagging.

Click **Reset** under the card to hand the value back, which turns the Value switch off. The index then moves freely from where it is.

24h change

This is the percentage customers see next to the index value, for example "24h change +3.44%". When this switch is off, the number is the real change over the last 24 hours, worked out for you. When it is on, the number is yours and stays fixed until you change it.

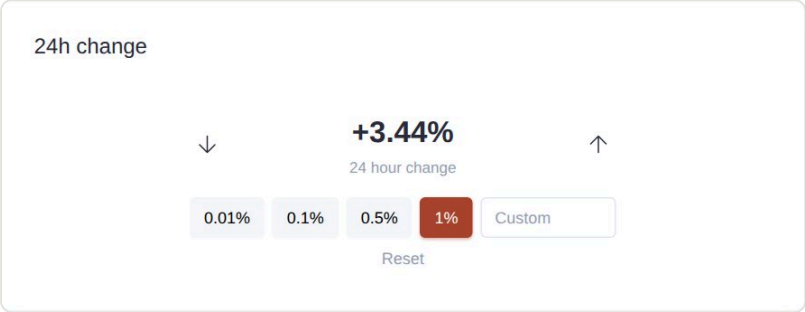


Figure 52. The 24h change card.

1. Turn on the **24h change** switch.
2. Pick a step: 0.01%, 0.1%, 0.5% or 1%, or type your own.
3. Click the arrows to set the number customers see.

Trend, volatility and movement strength

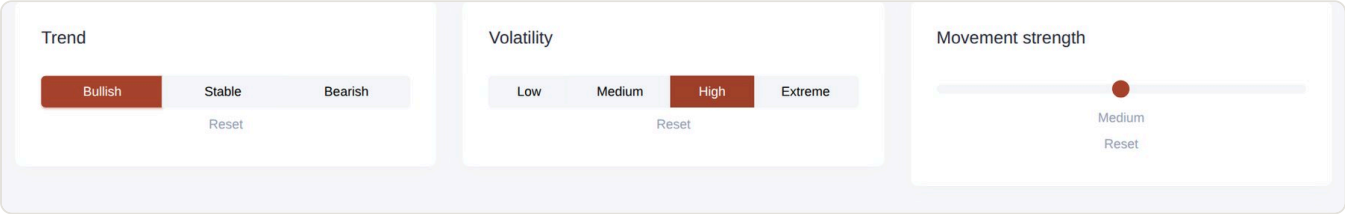


Figure 53. Trend, Volatility and Movement strength.

Control	Choices and what they do
Trend	**Bullish**: a slow drift up. **Stable**: no drift. **Bearish**: a slow drift down.
Volatility	**Low**: tiny zig-zags. **Medium**: normal. **High**: about twice medium. **Extreme**: about four times medium.
Movement strength	A slider from Very low to Extreme. It scales every move on top of volatility. Very low is about 60% of normal and Extreme about 140%.

Each of these only works while its switch is on. Each card has a **Reset** link that turns its switch off again.

Reset manual controls and Return to automatic

Button	What it does
Reset manual controls	Turns the five switches off but keeps manual control on. The index moves freely with calm defaults.
Return to automatic	Turns manual control and all five switches off. The index goes back to the automatic behavior, starting from where it is now. It does not jump back to an old value.

Presets

A preset saves your current setup so you can switch back to it in one click.

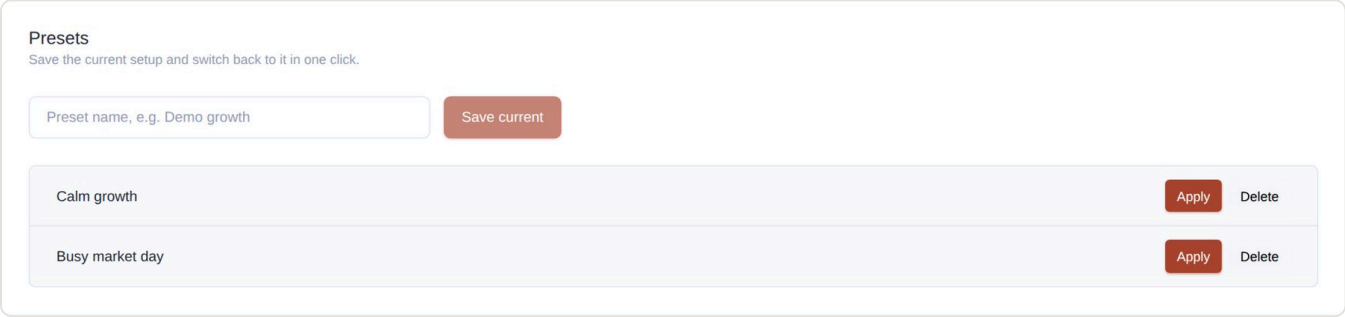


Figure 54. Saved presets.

1. Set everything the way you want it.
2. Type a name, for example "Calm growth", and click **Save current**.
3. Later, click **Apply** next to a preset to bring back every setting at once. Click **Delete** to remove it.

Ready-made setups for the Platform Index

You want	Do this
A steady climb	Manual control on. Switch on Trend (bullish), Volatility (low) and Movement (medium). Leave Value off.
Move the index to a level now, then let it climb	Manual control on. Switch on Value and Trend. Use the arrows to reach the level, then choose bullish.
A calm market for a few days	Manual control off. Automatic behavior: Stable.
A busy, exciting market	Manual control off. Automatic behavior: Volatile.
Undo all of your steering	Click Return to automatic.

Live markets

Open the **Live markets** tab. The top card lists the markets customers can choose on their charts. Below it are the price controls for one market at a time.

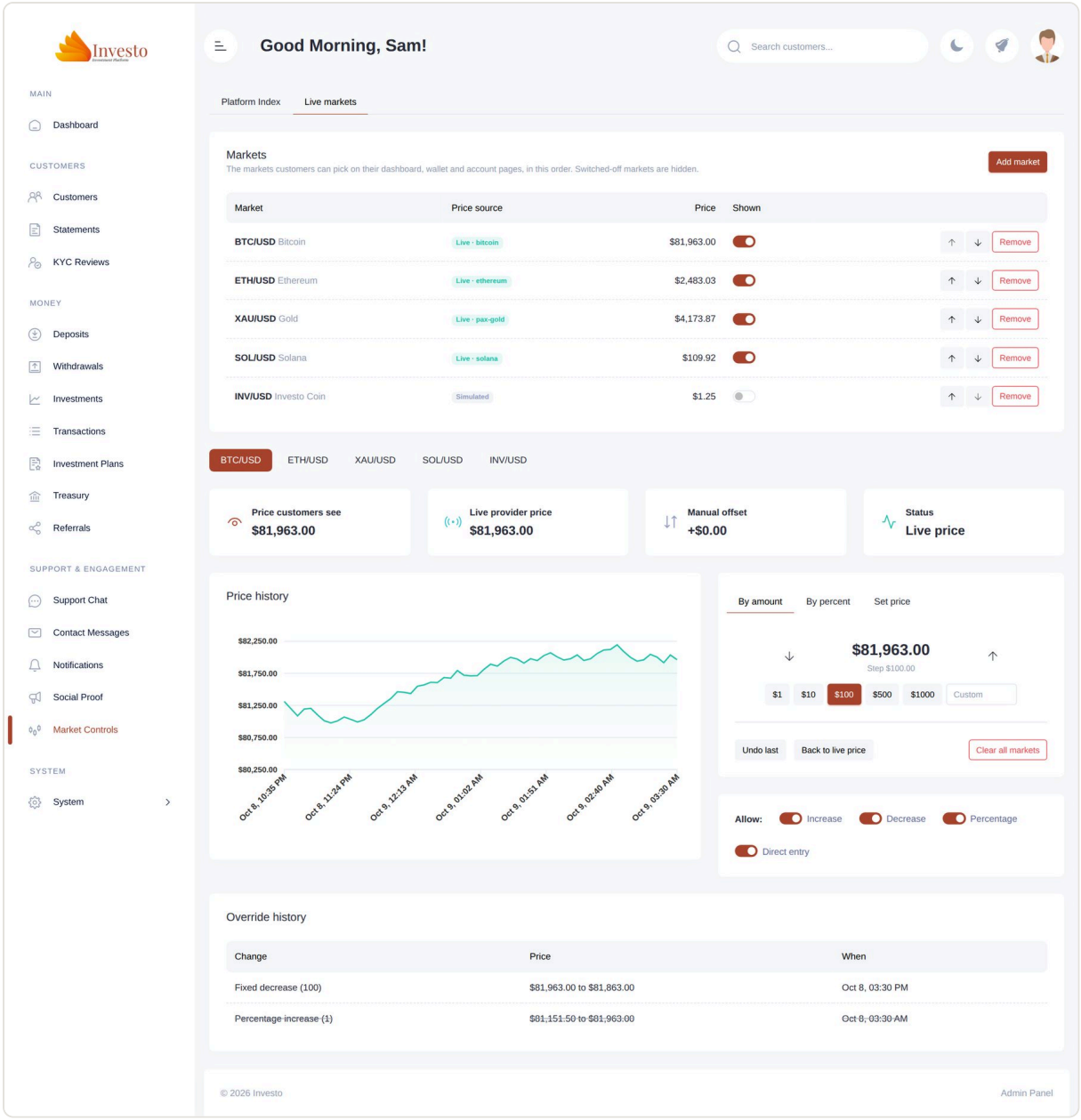


Figure 55. The Live markets tab.

The markets list

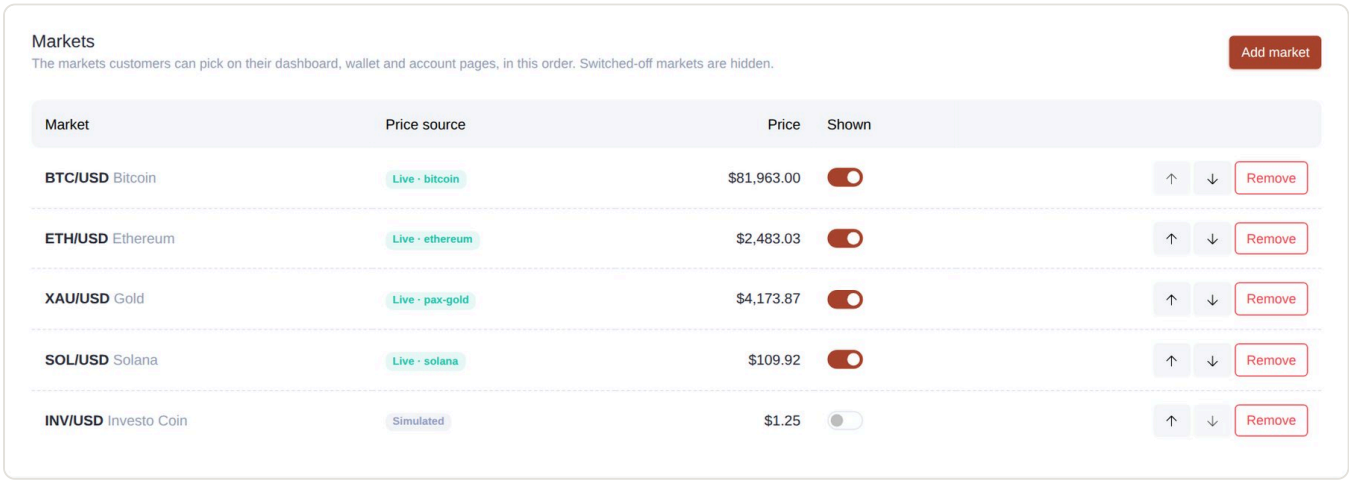


Figure 56. The markets customers can pick.

Column or button	What it does
Price source	**Live** means the real price from CoinGecko, updated every 5 minutes. **Simulated** means a price that moves by itself from a starting price.
Price	The price customers see now, including any change you made.
Shown	Switch a market off to hide it from customers without deleting it.
Up and down arrows	Change the order. Customers see markets in this order.
Remove	Deletes the market, its price history and your changes. Customers can no longer pick it.

Adding a live coin

1. Click **Add market**. **Live coin price** is selected.
2. Type the coin's name, for example "cardano", and click **Search**.
3. Click the right coin in the results. The symbol, name and current price fill in by themselves.
4. Check the symbol (for example ADA/USD) and click **Add market**. Customers can pick it at once.

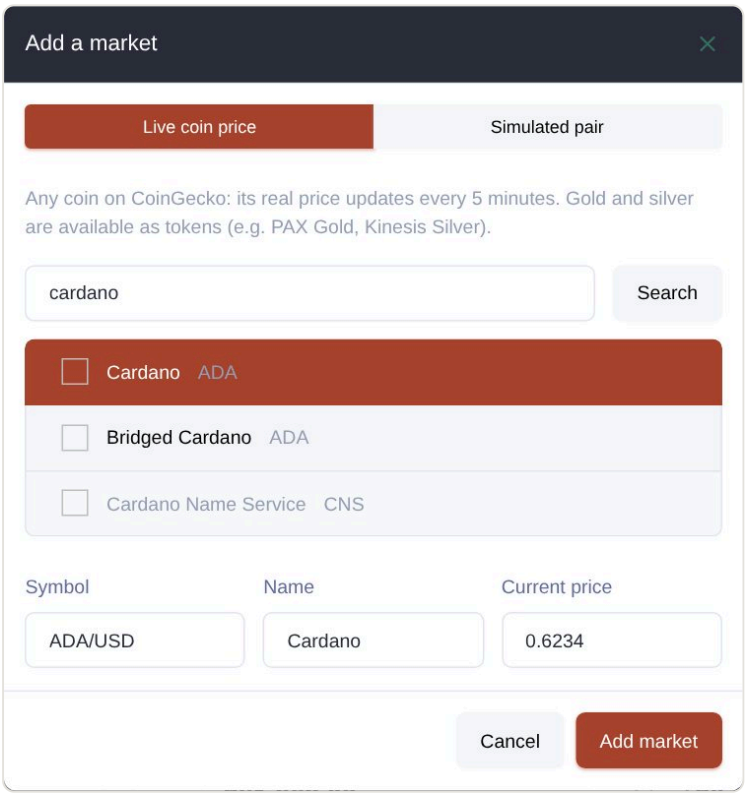


Figure 57. Adding a live coin.

> **TIP**
> Gold and silver are available as tokens. Search for "PAX Gold" or "Kinesis Silver".

Adding a simulated pair

Use a simulated pair for anything without a free live price, such as EUR/USD, or for your own token.

1. Click **Add market**, then **Simulated pair**.

2. Type a symbol such as EUR/USD, a name such as Euro, and a starting price.
3. Click **Add market**. The price moves by itself from there, and you can steer it with the price controls below.

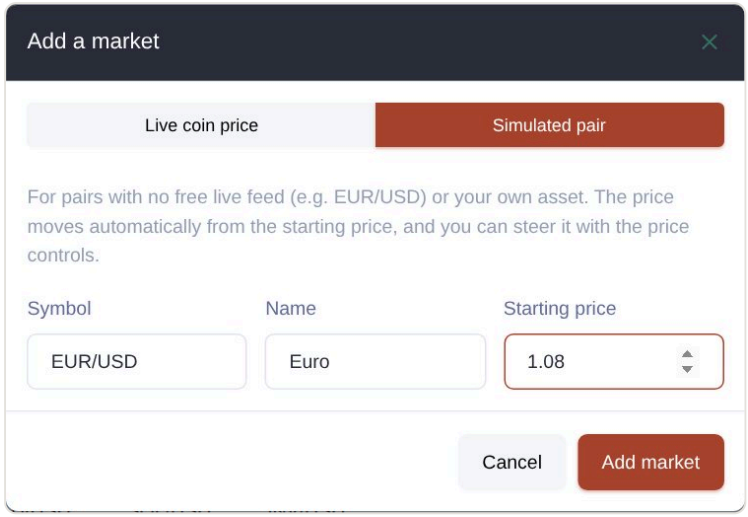


Figure 58. Adding a simulated pair.

Changing a price

Pick a market with the buttons above the price cards (for example BTC/USD). The four cards show:

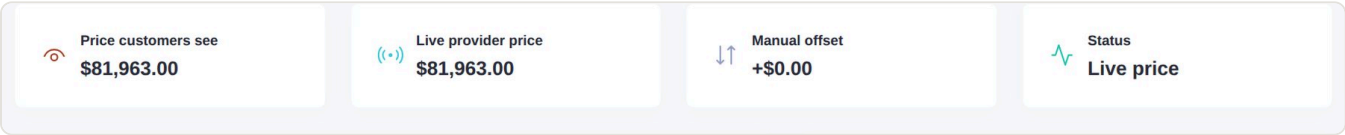


Figure 59. The price cards with no change made.

Card	Meaning
Price customers see	The price on every customer chart right now.
Live provider price	The real price from CoinGecko.
Manual offset	Your change on top of the real price. $0.00 means no change.
Status	**Live price** when there is no change, **Override active** when there is.

Your change is kept as an **offset**. If you lower Bitcoin by $500, customers see the real price minus $500, and the price keeps following the real market from there.

There are three ways to change a price:

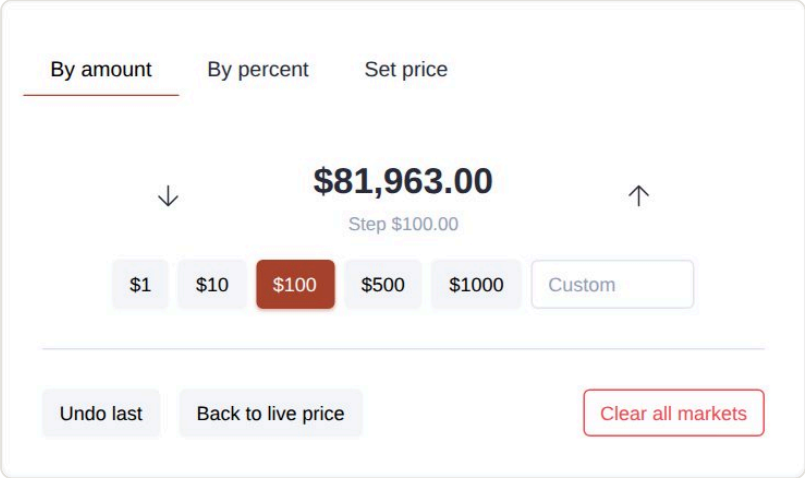


Figure 60. By amount.

1. **By amount**: pick a step ($1 to $1000 or Custom) and click the up or down arrow.
2. **By percent**: pick a percentage (0.1% to 5% or Custom) and click an arrow.
3. **Set price**: type the exact price customers should see and click **Apply**.

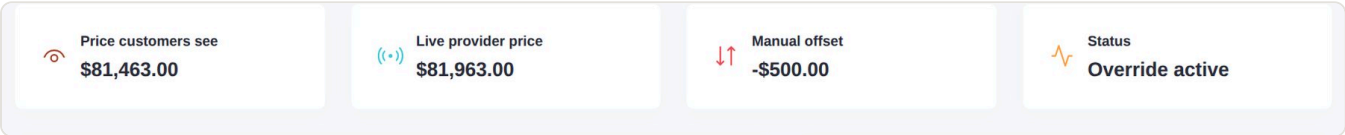


Figure 61. The cards after lowering Bitcoin by $500. The status shows Override active.

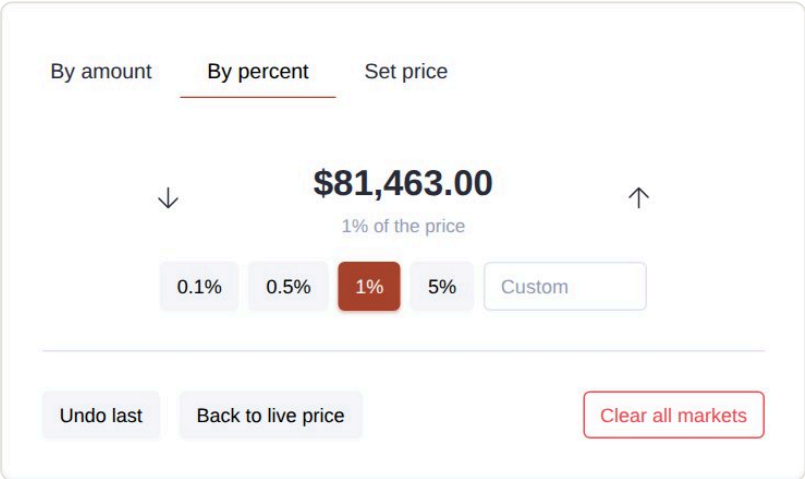


Figure 62. By percent.

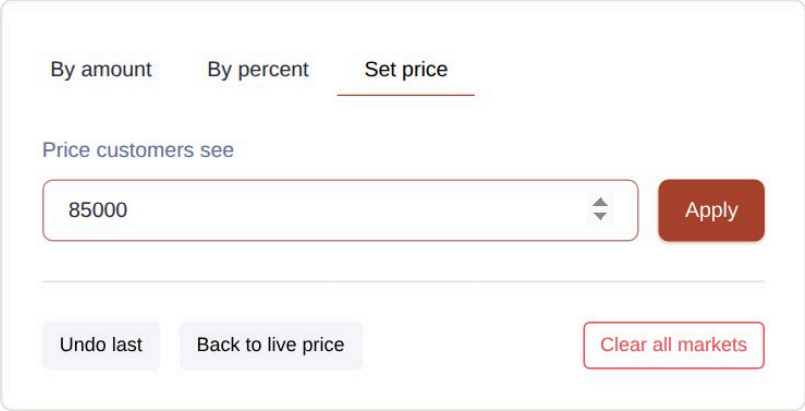


Figure 63. Set price.

Button	What it does
Undo last	Takes back your last change on this market.
Back to live price	Removes all your changes on this market. Customers see the real price again.
Clear all markets	Removes your changes on every market at once.

Allow switches

The **Allow** switches decide which kinds of change are possible on the selected market. They are a safety lock. For example, switch off **Increase** so nobody can push this price up by mistake.

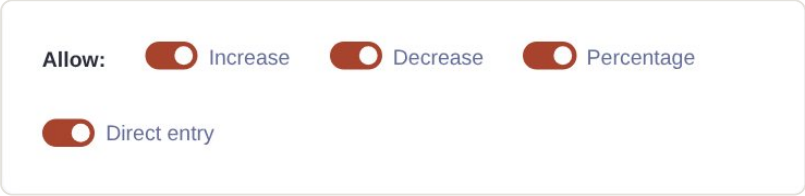
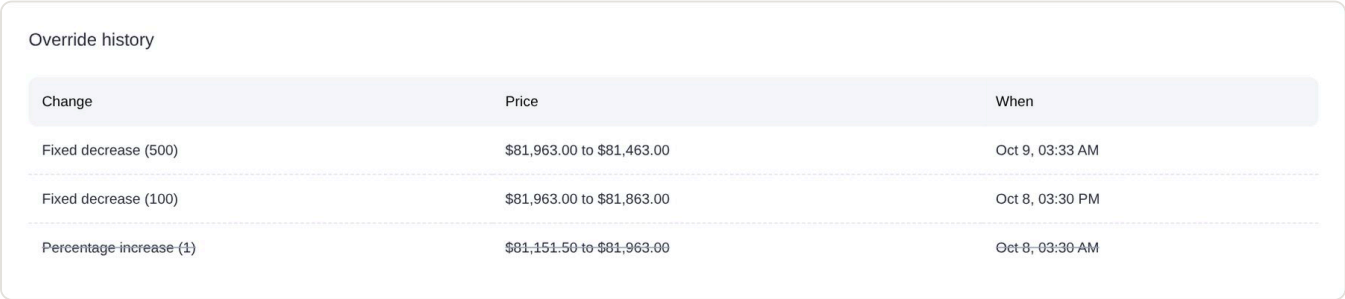


Figure 64. The Allow switches.

Override history

Every change is listed with the old and new price and the time. Lines you undid are crossed out. Every change is also saved in the Audit Logs.



Override history

Change	Price	When
Fixed decrease (500)	$81,963.00 to $81,463.00	Oct 9, 03:33 AM
Fixed decrease (100)	$81,963.00 to $81,863.00	Oct 8, 03:30 PM
~~Percentage increase (1)~~	~~$81,151.50 to $81,963.00~~	~~Oct 8, 03:30 AM~~

Figure 65. The override history.

Projections for one customer

A projection draws a dashed line on one customer's chart showing where a value could go. Use it when a customer asks "what could this look like?" It is always labeled **Projection**, and the customer's real balance, statements and withdrawals never change.

1. Open **Customers** and click the customer.
2. Scroll to **Chart projections** at the bottom of the profile.
3. Click **Set up** (or **Edit**) next to the chart you want: Market Overview, Portfolio Composition, or the Market widget on their Wallet and Account pages.
4. Fill in the window as described below and click **Save**.
5. Use the switch on the right of the row to show or hide the projection for this customer.

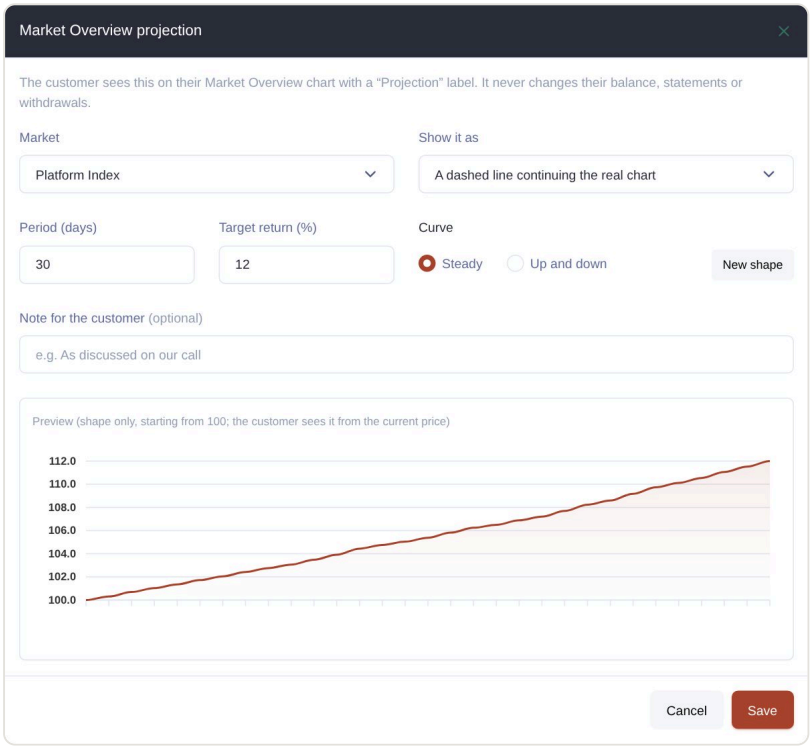


Figure 66. Setting up a projection.

Field	What it does
Market	Which chart line the projection follows, for example Platform Index or Bitcoin.
Show it as	**A dashed line continuing the real chart** adds the projection after today. **The whole chart** shows only the projection.
Period (days)	How far into the future the line goes.
Target return (%)	Where the line ends, for example 12% above today.
Curve	**Steady** for a smooth climb, or **Up and down** for a bumpier path. Click **New shape** for a different bumpy path.
Note for the customer	Optional text shown with the projection.

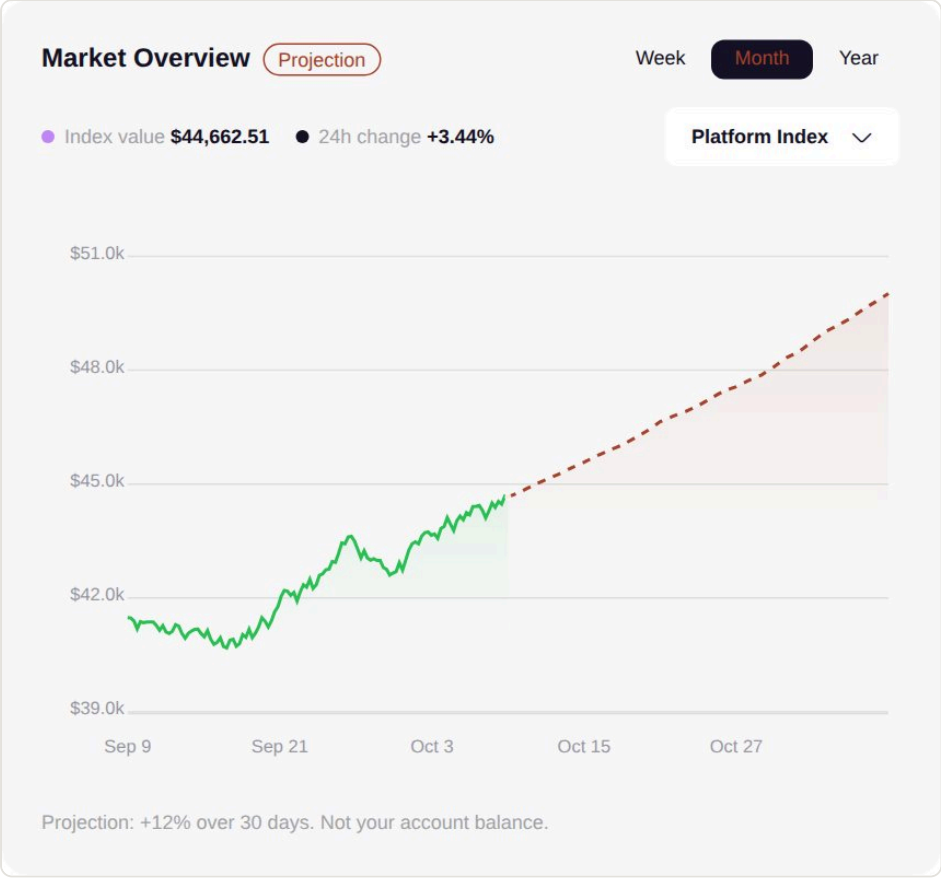


Figure 67. What the customer sees: their real chart, then the dashed Projection line.

Questions about the market

Why does the chart still move when manual control is on?

So it always looks real. With Value on, the index wobbles close to your value. Turn Volatility on and choose Low for the calmest line.

I changed the value. When do customers see it?

The next time their chart loads, usually within seconds. The chart steps to the new value and then carries on moving.

Why is the 24h change different from what I expected?

With the 24h change switch off, the number is the real change over the last 24 hours. If you raised the value a lot today, the real change is big. Turn the switch on to show your own number instead.

Do market changes affect customer balances or plan earnings?

No. Market Controls only change what the charts show. Balances and earnings follow the plans customers bought.

SECTION 14

System pages

These pages hold the setup of the platform. Most of them are for a Super Admin only.

Setup Checklist

A to-do list for getting the platform ready to launch. Each step shows **To do** or **Done**, explains what is needed, and has a button that opens the right page. The bar at the top shows how far along you are. Click **Check again** after you finish a step.

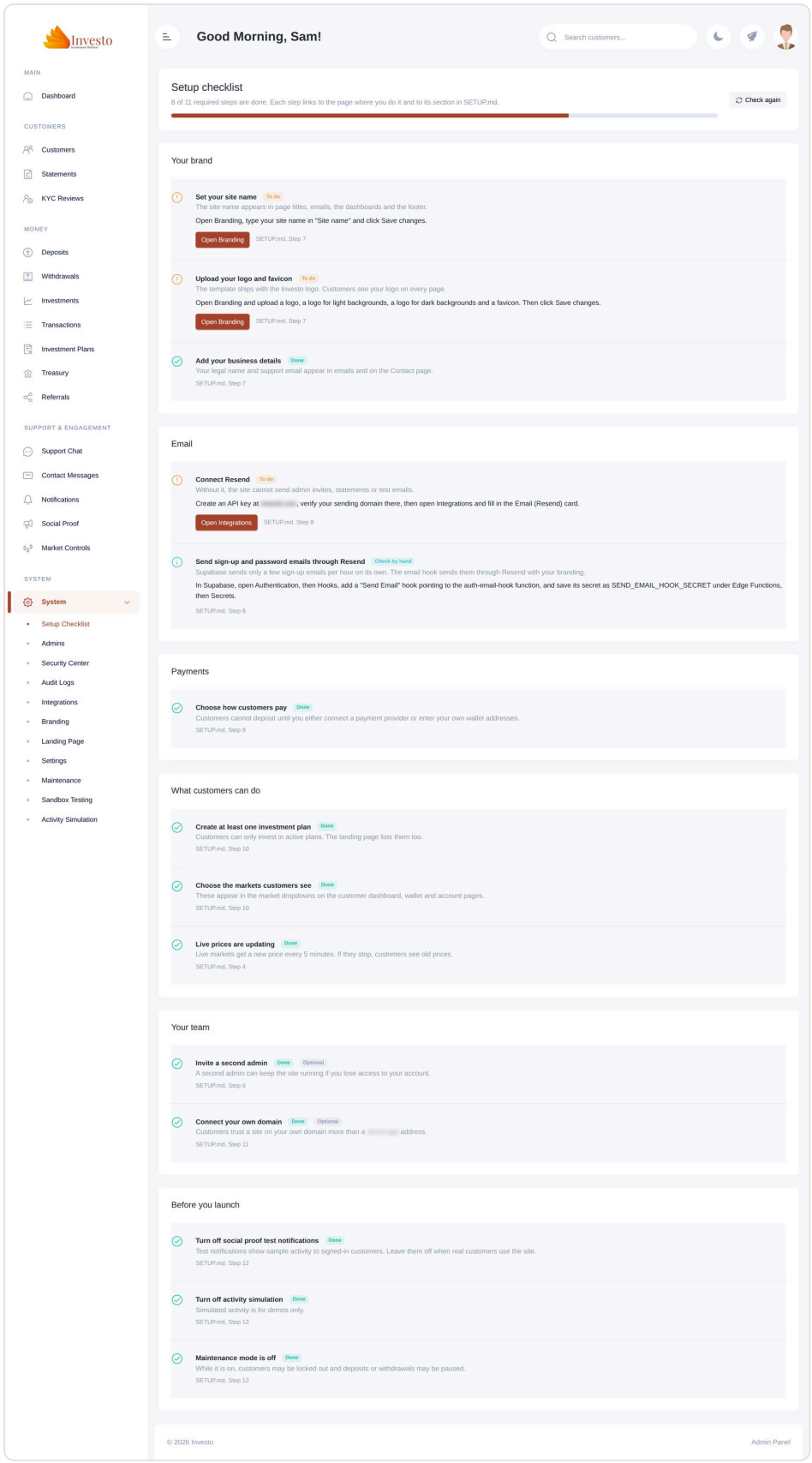


Figure 68. The Setup Checklist.

Security Center

Shows blocked accounts, everyone signed in right now, admin sessions and security events such as failed sign-ins. Click **Sign out everywhere** next to a session to end all of that person's sessions at once.

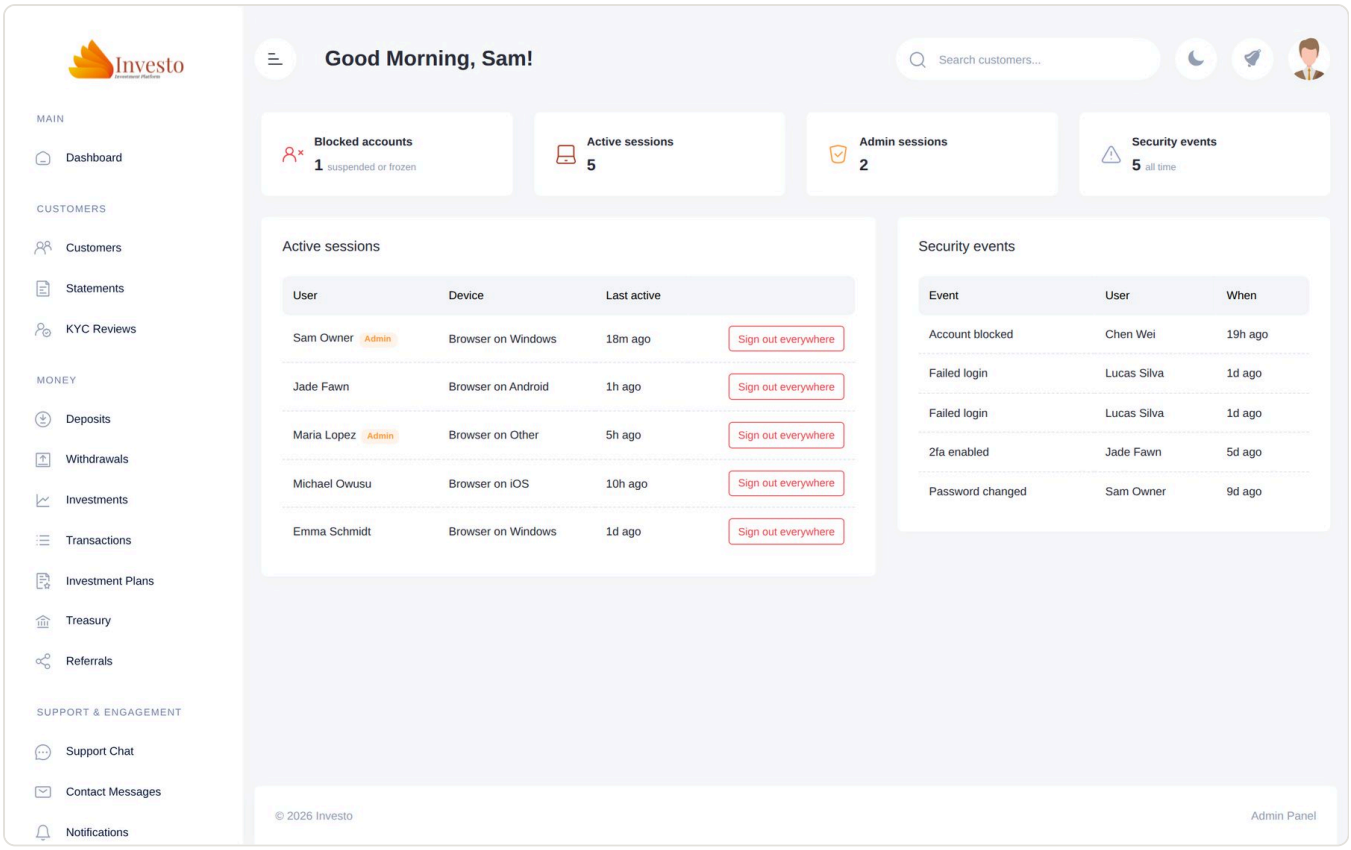


Figure 69. The Security Center.

Audit Logs

A permanent record of every important admin action: who did it, when, what changed, and the value before and after. Use the tabs to filter by area and the search box to find an admin or an action. Entries cannot be edited or deleted.

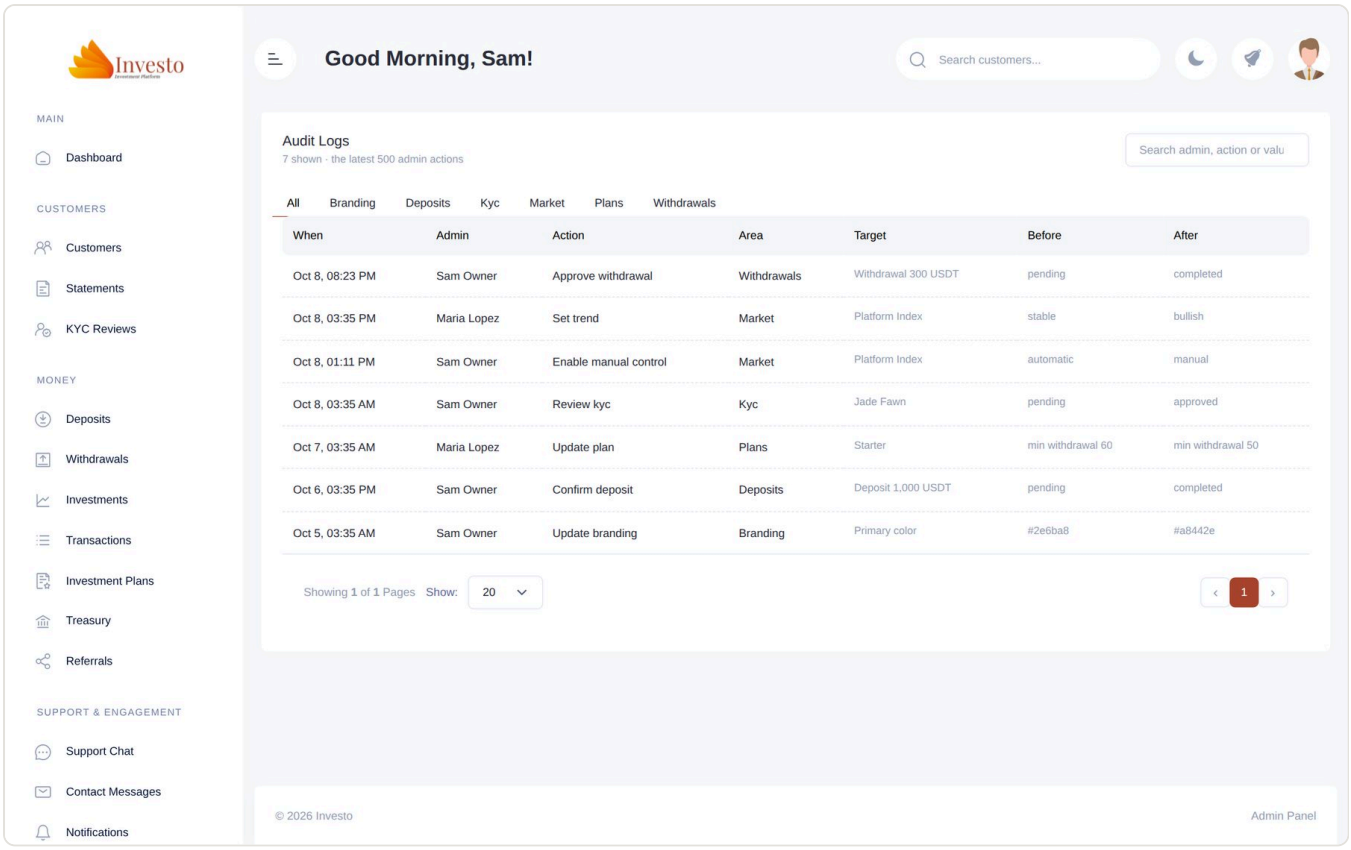


Figure 70. The Audit Logs.

Integrations

Connect the outside services the platform uses.

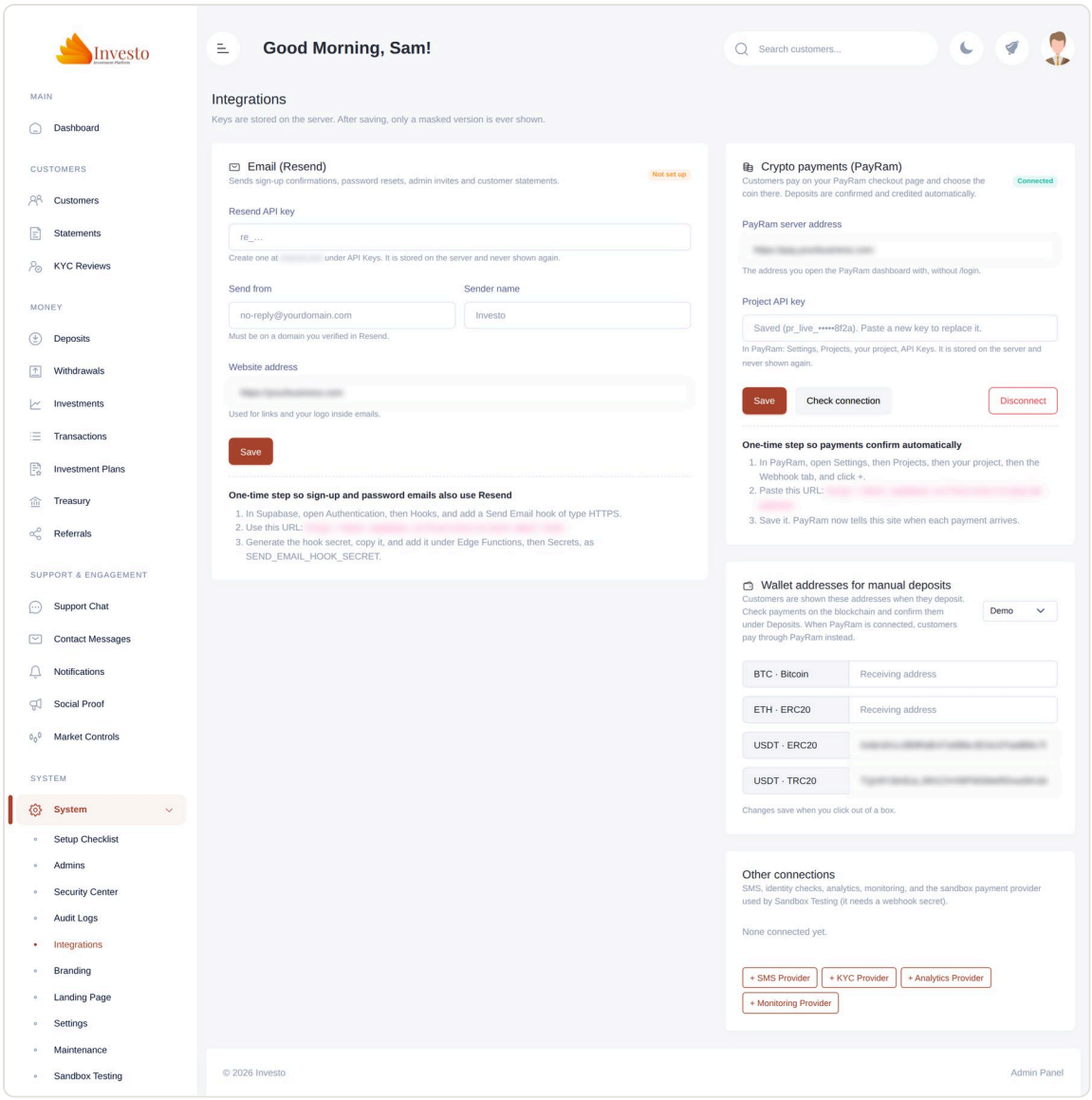


Figure 71. The Integrations page.

Card	What it is for
Crypto payments (PayRam)	Automatic deposits and payouts. Enter your PayRam server address and project API key, click **Save**, then **Check connection**. Copy the webhook address shown into PayRam so payments confirm by themselves.
Email (Resend)	Sends sign-up confirmations, password resets, admin invites and statements. Paste your Resend API key, the sending address and your website address, then click Save.
Wallet addresses for manual deposits	The addresses customers pay to when PayRam is not used. Add one per coin and network, for example USDT on TRC20.

IMPORTANT

API keys are stored on the server. After saving, only the last few characters are ever shown again. Never send keys to anyone by chat or email.

Branding

The **Brand** tab sets your site name, theme, fonts, colors, logos and social media links. The **Business details** tab holds your legal name, support contact details and domain. Click **Save changes** at the top when you are done.

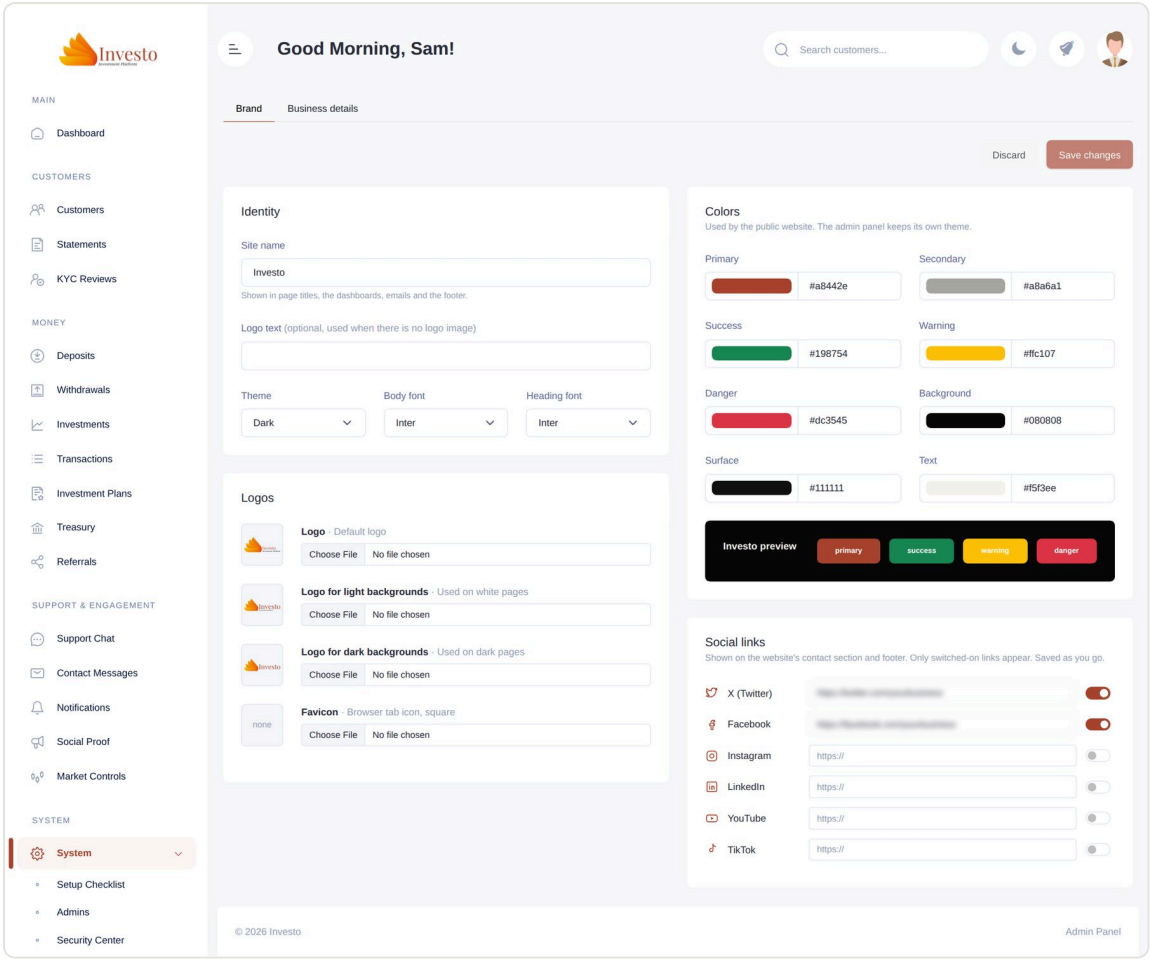


Figure 72. Branding, Brand tab.

- **Logos**: upload one logo for light backgrounds and one for dark backgrounds, plus a small square favicon for the browser tab.
- **Colors**: the Primary color is used for buttons and highlights everywhere. The preview shows how your colors look together.
- **Social links**: switch on the networks you use and paste your page address. Only switched-on links appear on the website.

Landing Page

Change the words and pictures on your public website without touching any code.

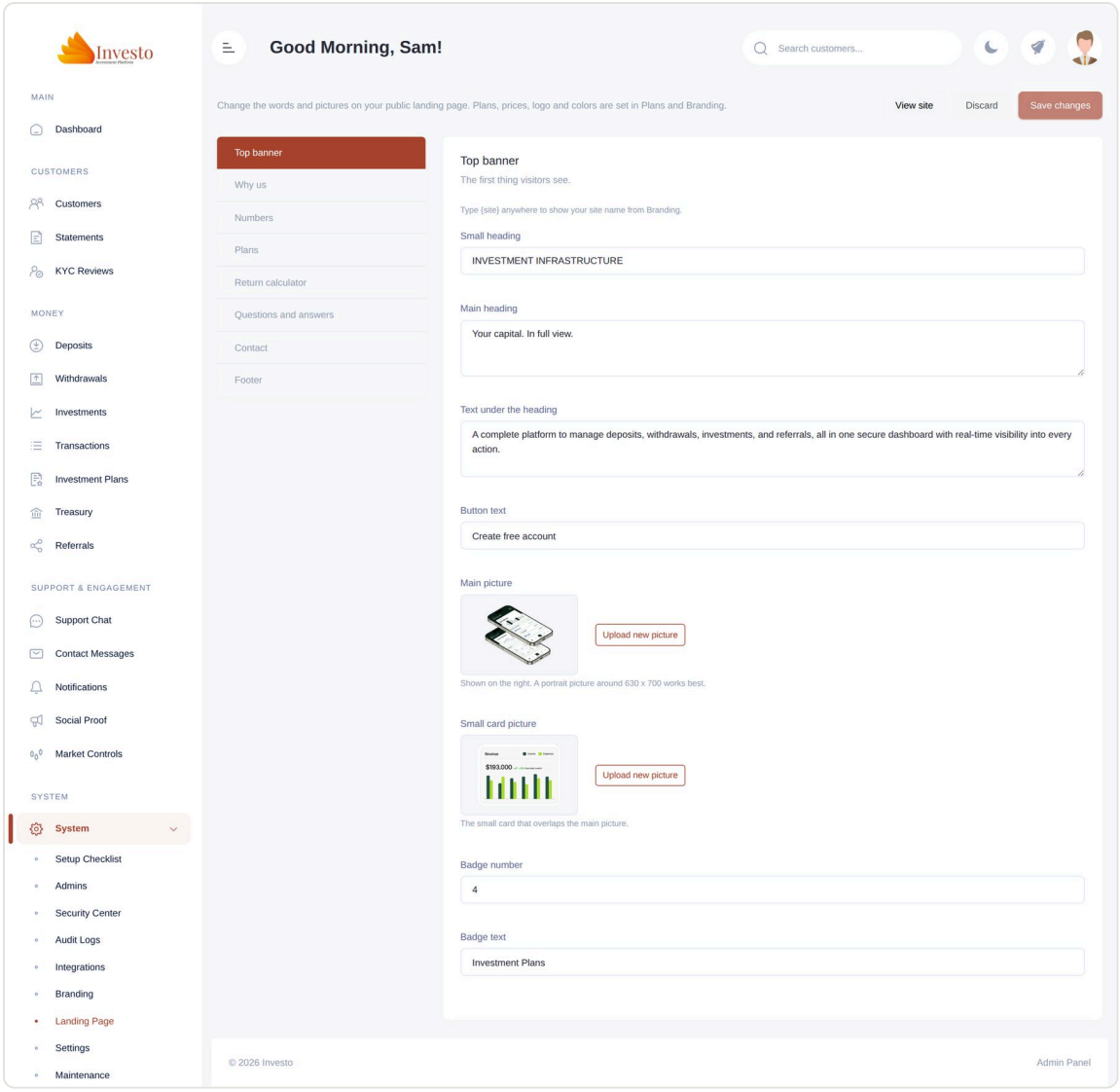


Figure 73. The Landing Page editor.

1. Pick a section on the left: Top banner, Why us, Numbers, Plans, Return calculator, Questions and answers, Contact or Footer.
2. Change any text. A field you changed shows a **Changed** label and a **Use default** link that puts the original text back.
3. To change a picture, click **Upload new picture**. The hint under each picture gives the best size. Pictures can be up to 5 MB.
4. Type **{site}** anywhere to show your site name from Branding.
5. Leave a feature card title, a list point or a question empty to hide it.
6. Click **Save changes**. Click **View site** to check the result.

Settings

General details such as the site name, support email, support phone, currency, time zone and date format. Click **Save general settings** when done.

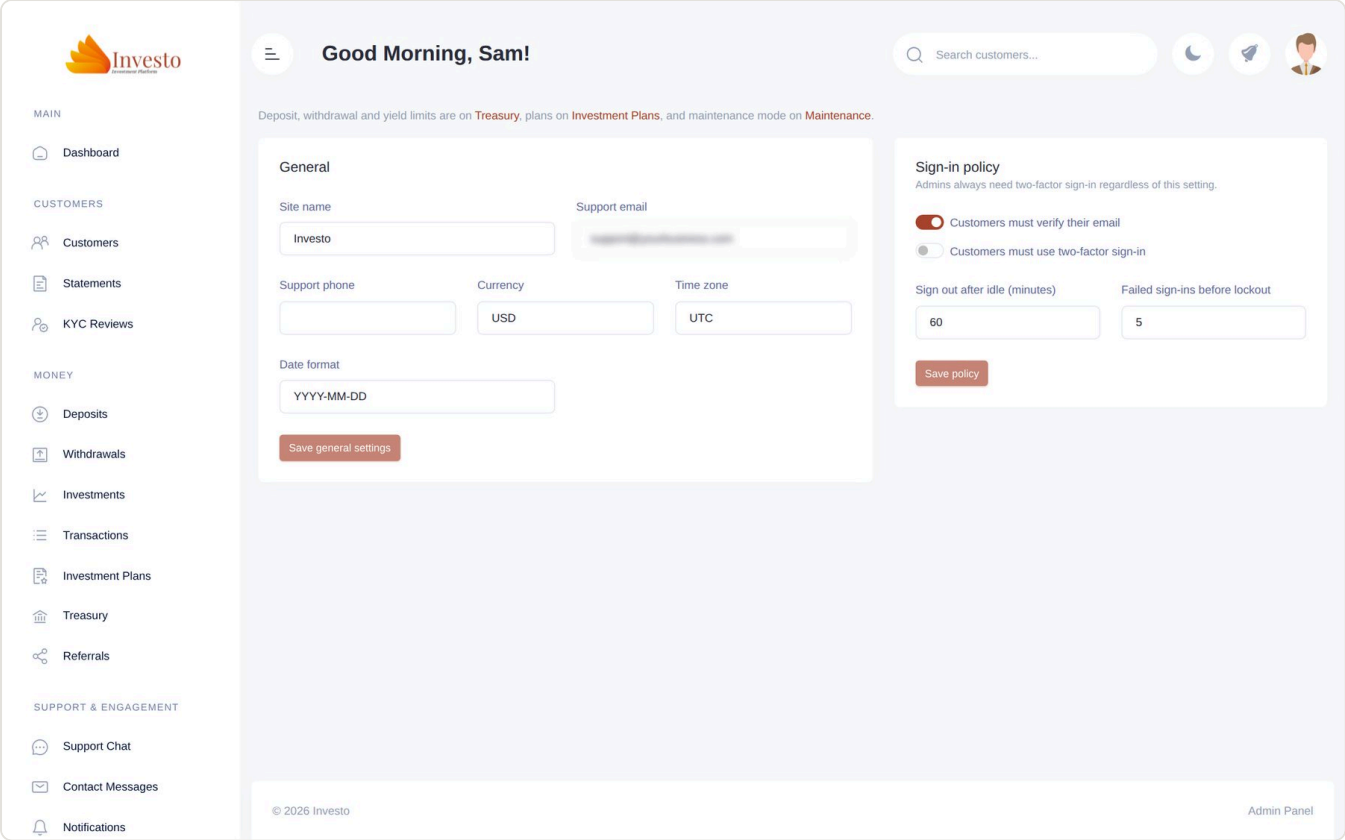


Figure 74. Settings.

Maintenance

Use maintenance mode while you work on the platform or if something goes wrong.

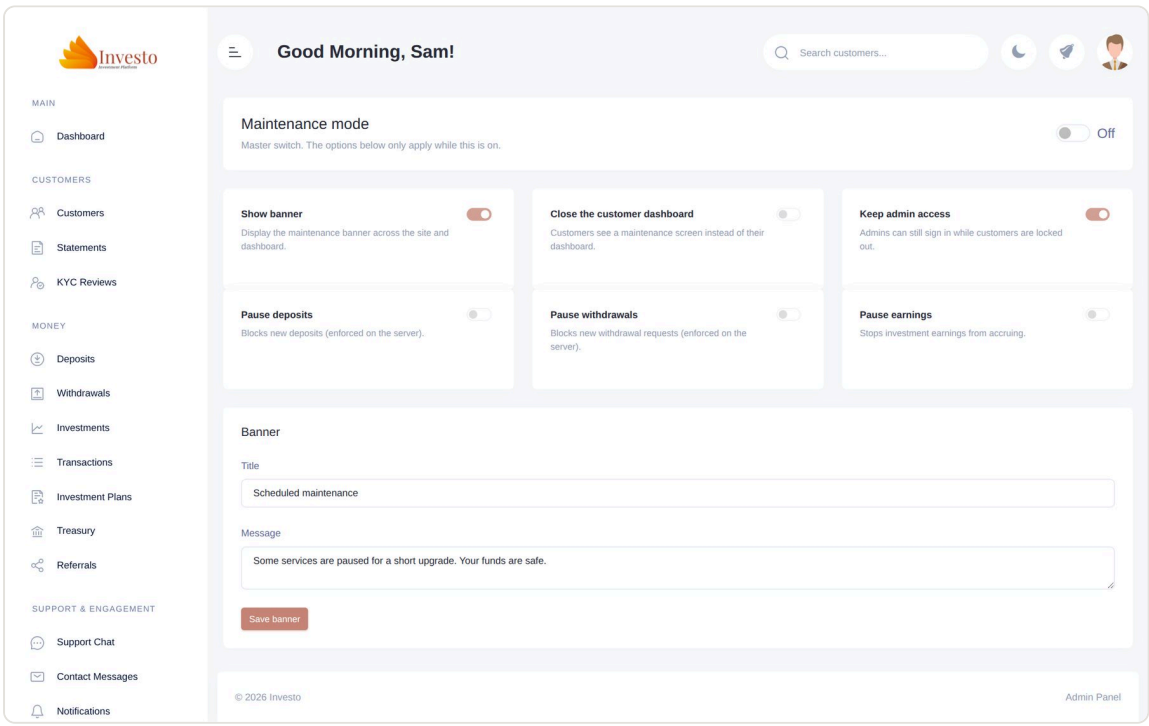


Figure 75. Maintenance.

1. Turn on the **Maintenance mode** switch at the top. The options below only apply while it is on.

2. Choose what happens, using the table below.
3. Write a banner title and message and click **Save banner**.
4. Turn maintenance mode off when you are done. Everything goes back to normal at once.

Option	What it does
Show banner	Shows your banner message across the site and dashboard.
Close the customer dashboard	Customers see a maintenance screen instead of their dashboard.
Keep admin access	Admins can still sign in while customers are locked out. Leave this on.
Pause deposits	Blocks new deposits. Enforced on the server.
Pause withdrawals	Blocks new withdrawal requests. Enforced on the server.

Sandbox Testing

For testing payments without real money while the site runs in development mode. Test deposits started in sandbox mode wait here, and you can confirm them to see the full flow. This page does nothing on a live site.

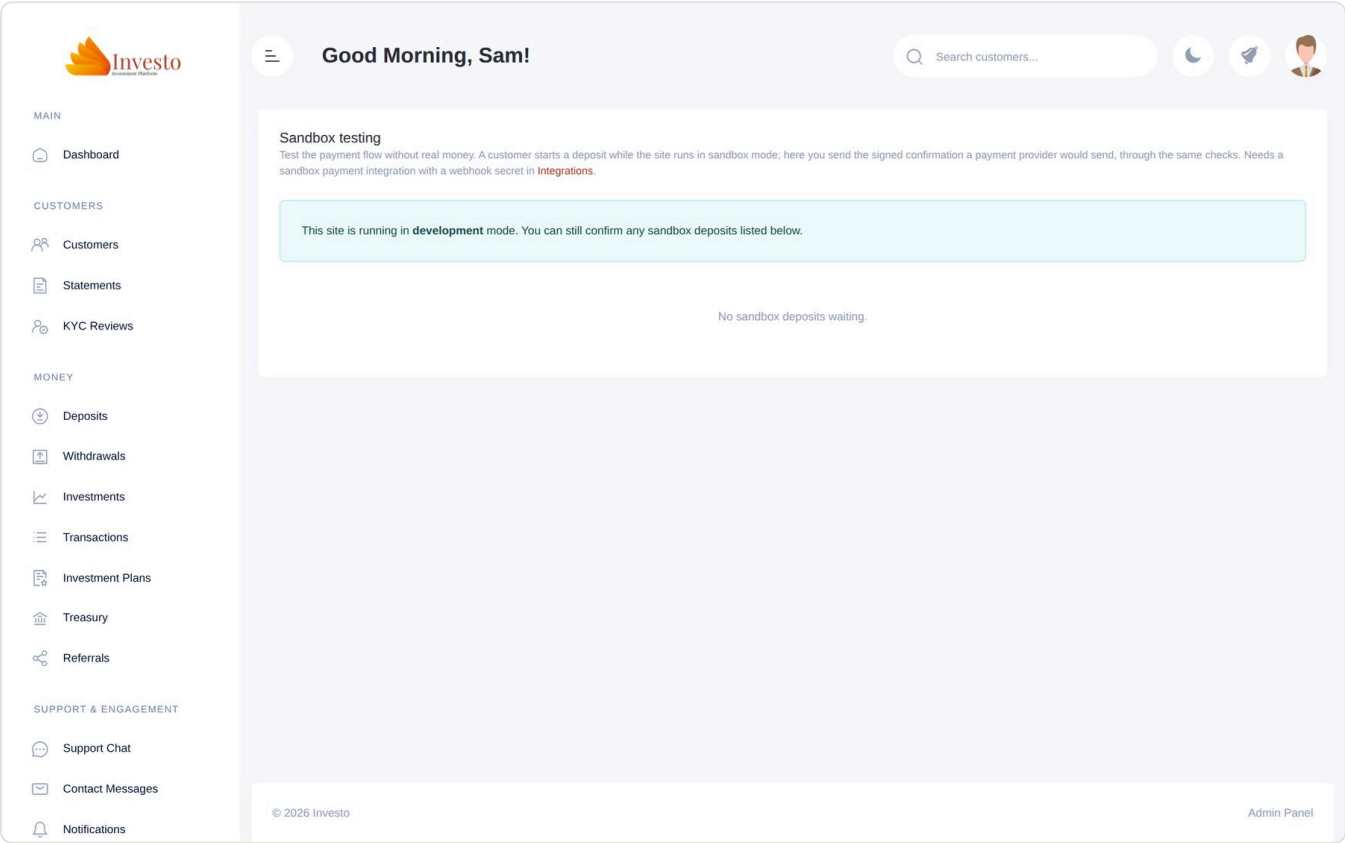


Figure 76. Sandbox Testing.

SECTION 15

Your profile

Click your picture in the top right corner and choose **My Profile**.

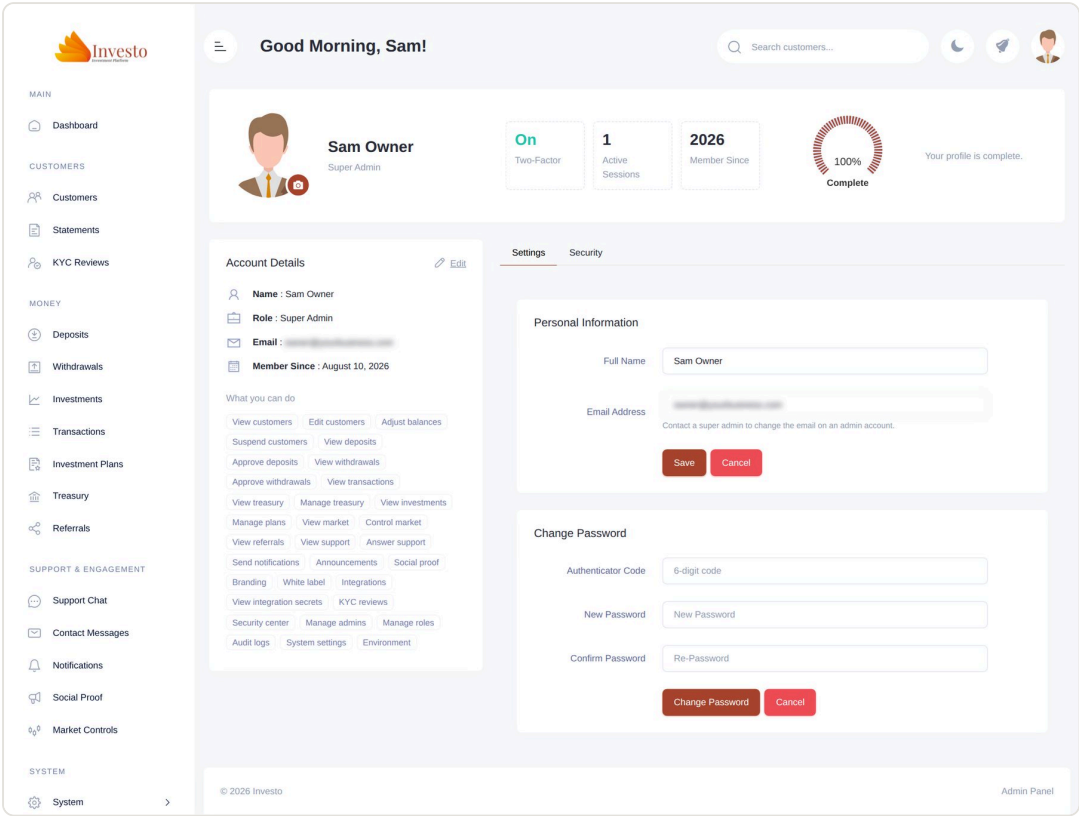


Figure 77. My Profile.

- **Settings tab**: change your name and email.
- **Change Password**: type the 6 digit code from your authenticator app and your new password twice, then click **Change Password**.
- **Security tab**: see your two-factor sign-in status and your signed-in devices.
- The list on the left shows exactly what your role allows you to do.

SECTION 16

Daily routine

A simple routine keeps customers happy and the books clean.

Every day

1. Open the **Dashboard** and read the **Needs Attention** card.
2. Confirm or reject waiting **Deposits**.
3. Pay or reject waiting **Withdrawals**.
4. Approve or reject waiting **KYC Reviews**.
5. Answer open **Support Chat** conversations and **Contact Messages**.

Every week

- Check the **Treasury** cards and top up your PayRam payout wallet.
- Look over **Market Controls** and switch back to automatic if you no longer need manual control.
- Refresh a few **Social Proof** demo lines so the pop-ups stay fresh.
- Skim the **Audit Logs** for anything you do not recognize.

> **IF IN DOUBT**
>
> If something on the platform looks wrong, turn on **Maintenance** with **Pause withdrawals** first. That gives you time to look into it safely.