Usage of brokerage CRM Client Registration

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CRM (Customer Relationship Management)

Sample User Experience when a client signs up;

- a) Client visits corporate website
- b) Client chooses to open an account.
- c) Chooses TYPE of account.
- (IB, Money Manager or Trader)



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Sample User Experience when a client signs up; (cont.)

- They can choose between
- Individual or
- Corporate
- Account types
- Once they click on Open Live Account, (depending on account type), It will take them to the respective registration page.



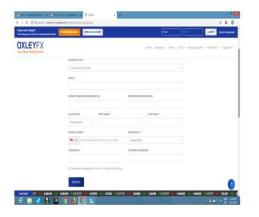
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Sample User Experience when a client signs up; (cont.)

- After registration process is complete, an email will be sent out to client.
- Client can login to member portal to complete the registration process (submitting valid docs, verification, etc).



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- Login to continue registration.
- Registration Process is in Sequence
- Will guide the Client Step by Step



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See to it that all required fields are complete.

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CRM (Customer Relationship Management)

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CRM (Customer Relationship Management)

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(for the above section, No.3, leave it at the default settings, The Senior Administrator will configure)

CRM (Customer Relationship Management)

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Dullit	LOGIN / COMPLETE REGISTRATION		
	Complete Registration Corp	porate Client	
COMPLETE REGISTRATION			
ACCOUNT PROFILE	(1) (2)	(3)	
	PERSONAL INFORMATION ADDRESSE	IS CREATE TRADING ACCOUNT SUPPORTING DOCUMENT	
		Supporting Document	
		only file type with PHG, 1PG, 3PGG, FDF, DOC and DOCK is allowed	
		Certification of Incorporate "	
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		Official Document with the List of Directors *	
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		Proof of Identity of all Directors and Ultimate Beneficial Owners (UBO) *	
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CRM (Customer Relationship Management)

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Upon completion, client will receive an email notifying them about the account status. From this point it's the Admin's responsibility to check on their documents. Log in to Admin Portal to do the necessary task.

Member's need to upload these documents for verification purposed.

Required Documents: Photocopy of valid PASSPORT, Govt issued ID or Driving License and Utility Bill no later than 3 months old.