Oxley FX

1) Usage of brokerage CRM
2) Client Registration

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CRM (Customer Relationship Management)

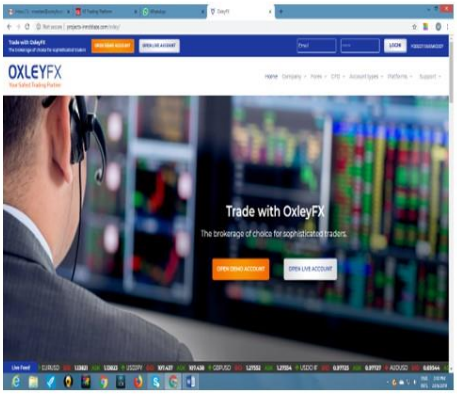
Sample User Experience when a client signs up;

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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CRM (Customer Relationship Management)

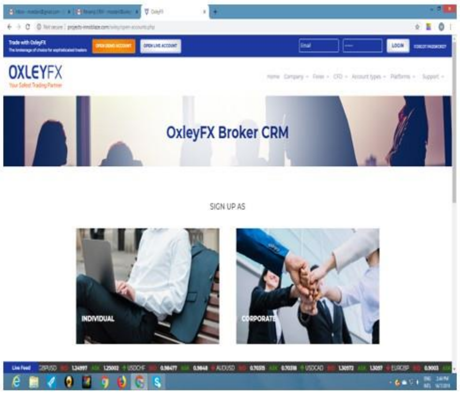
Sample User Experience when a client signs up; (cont.)

- 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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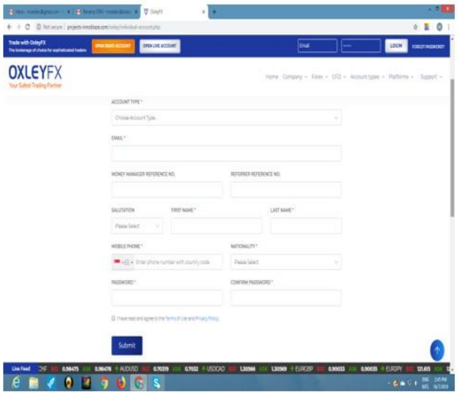
CRM (Customer Relationship Management)

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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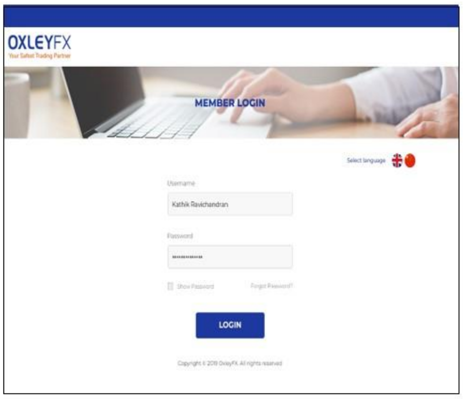
CRM (Customer Relationship Management)

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



See to it that all required fields are complete.

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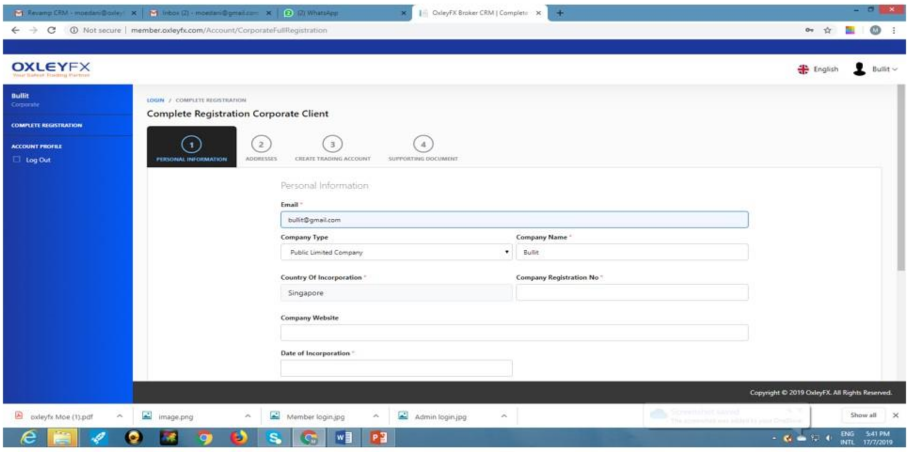
CRM (Customer Relationship Management)



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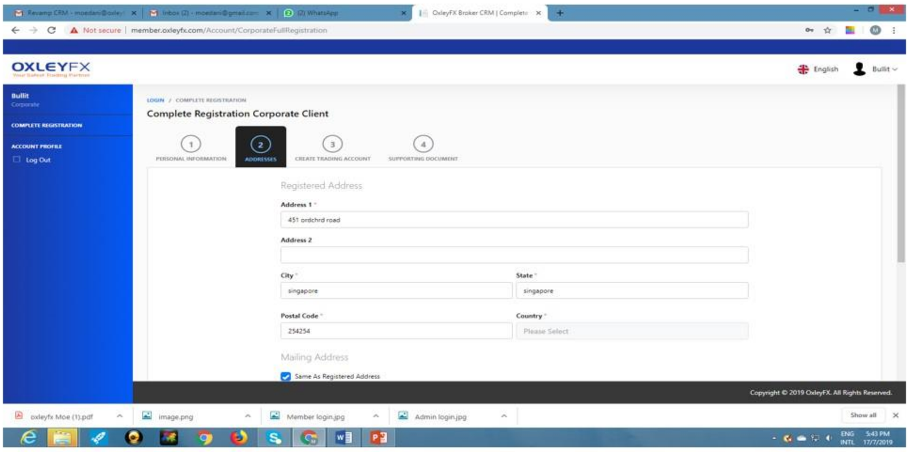
CRM (Customer Relationship Management)



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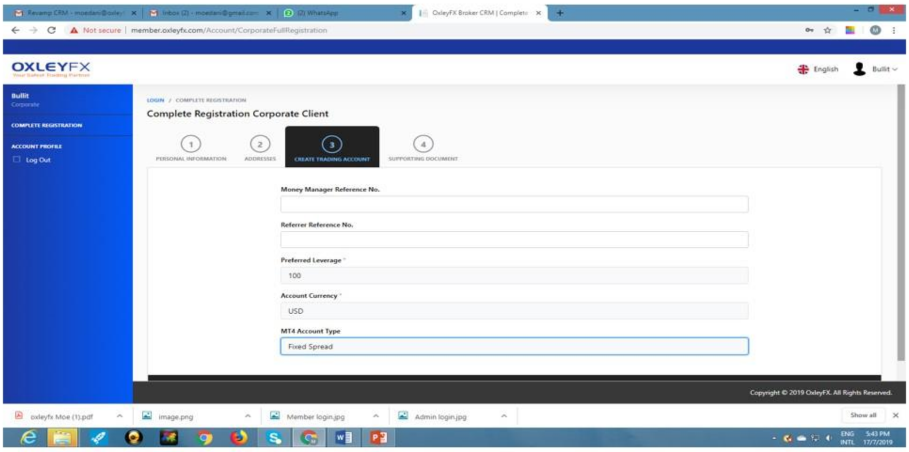
CRM (Customer Relationship Management)



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

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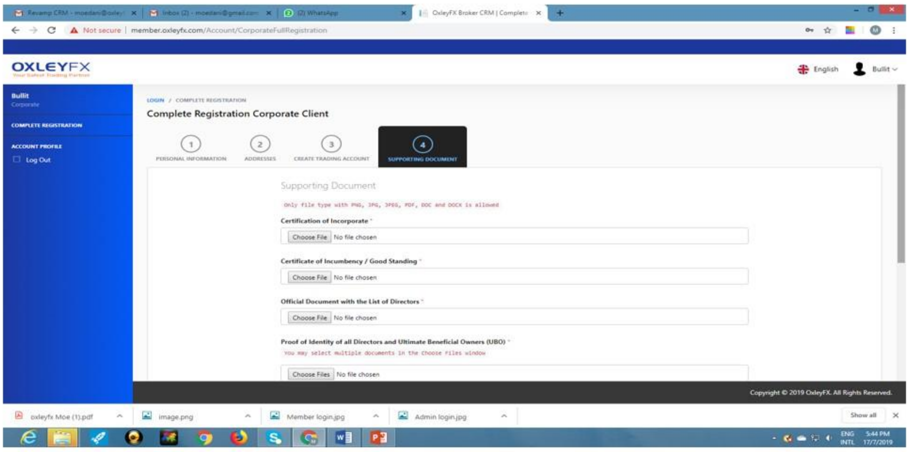
CRM (Customer Relationship Management)



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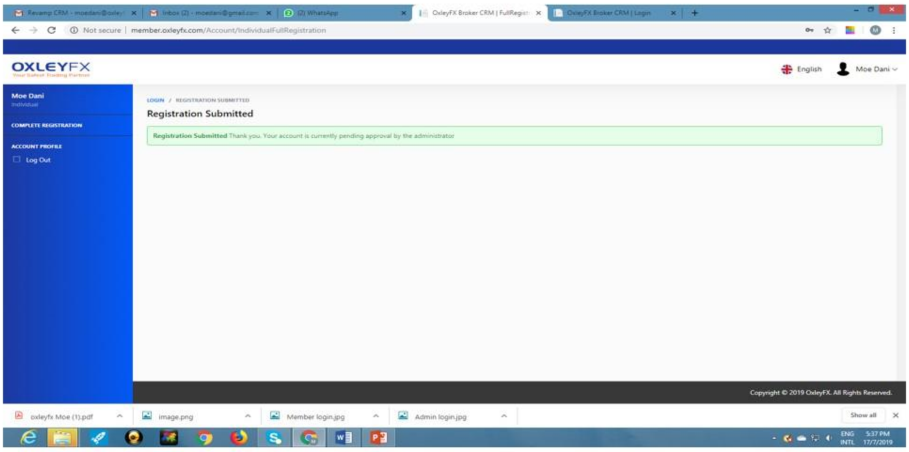
CRM (Customer Relationship Management)



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.