



• BROKERAGE TECHNOLOGY

Run your brokerage on one **powerful CRM**

The complete operating system for forex brokers — client portal, MT4/MT5 integration, IB commissions, payments, KYC and a full sales desk in one platform. Built by broker operators, battle-tested on live brokerages every day.

1,000+

traders managed
per brokerage

10+

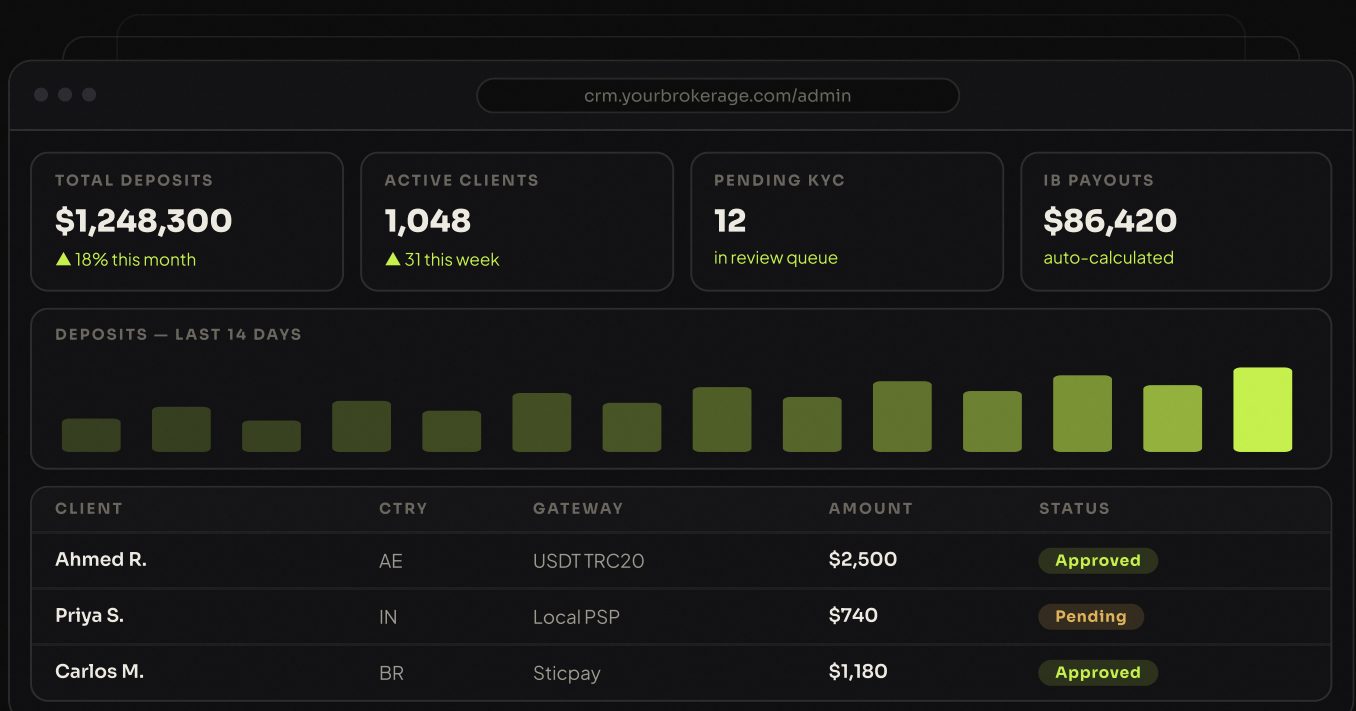
payment gateways
pre-integrated

3

IB commission models
tiered · per-lot · CPA

100%

white-label
your brand, your domain





A brokerage is a thousand moving parts.

We made them **one system,** **one database, one source** **of truth.**

Most CRMs were built by software vendors guessing how brokers work.

Ours was built inside a working brokerage — shaped by real deposits, real IB payouts and real compliance pressure, then packaged for yours.

P-01	Built by operators	Designed around how a brokerage actually runs — approvals, gates and payouts first, not an afterthought.
P-02	Battle-tested daily	The same engine processes live deposits, withdrawals and commissions every single day.
P-03	Yours completely	White-label branding, self-host option, full data ownership — your clients only ever see your name.

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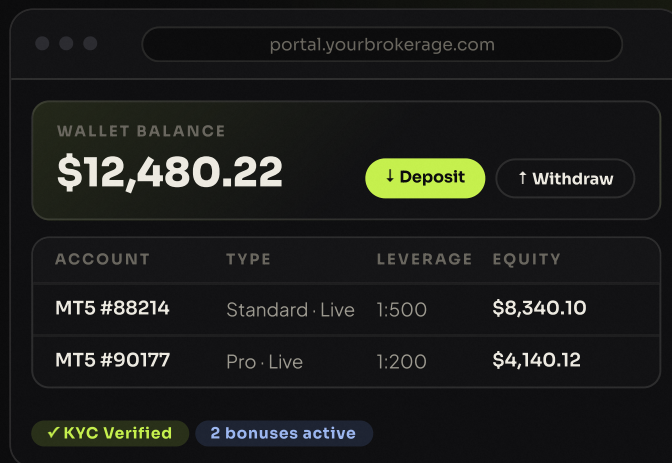
One platform, front to **back office**

Your clients get a modern portal to register, verify, deposit and open trading accounts. Your team gets a complete back office — leads, sales, IB networks, payment approvals, compliance and reporting. No duct-taped plugins: one system for your entire brokerage.

FOR YOUR TRADERS

A client area that converts

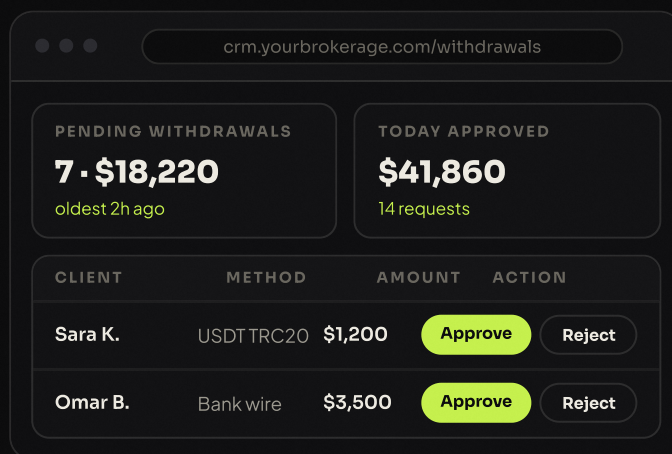
- ✓ Register, verify KYC and fund — one guided flow
- ✓ Live & demo MT4/MT5 accounts created instantly
- ✓ Deposit via crypto, cards or local payment rails
- ✓ Withdrawals, transfers and full transaction history
- ✓ Bonus wallet, referral rewards, multi-language



FOR YOUR OPERATIONS TEAM

Approvals, not admin chaos

- ✓ 360° client profile — accounts, funding, KYC, notes
- ✓ One-click deposit & withdrawal approvals, audited
- ✓ KYC document queue with gates on funding
- ✓ Role-based access — each team sees only its scope
- ✓ Live “who’s online” roster, session & IP tracking

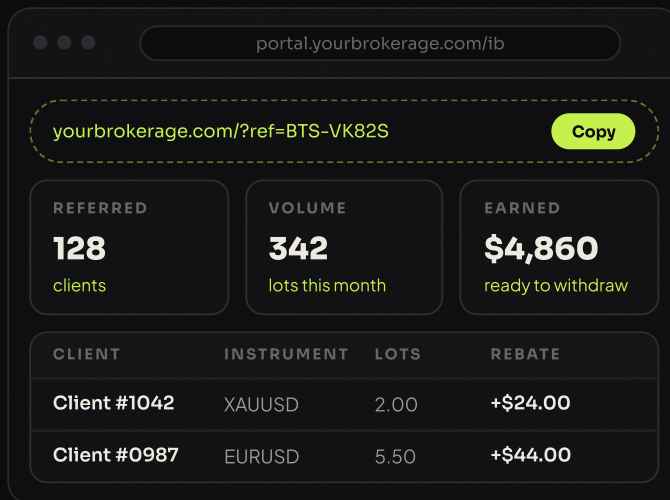


Partners & sales, automated

FOR YOUR PARTNERS

An IB network that runs itself

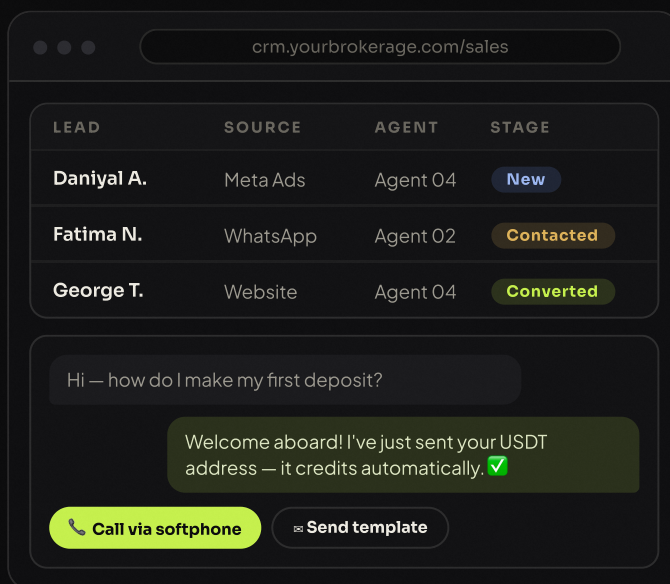
- ✓ Multi-tier IB structures — per-lot, revenue share, CPA
- ✓ Commission calculation automated & duplicate-proof
- ✓ Referral links and campaign tracking per partner
- ✓ IB dashboard — clients, volume, earnings in real time
- ✓ One-click payouts with full history and reporting



FOR YOUR SALES FLOOR

Every lead worked, nothing leaks

- ✓ Leads auto-captured from website, landings and ads
- ✓ Assignment & scoping — each agent sees only their book
- ✓ Built-in WhatsApp inbox and cloud softphone
- ✓ Branded email templates and follow-up sequences
- ✓ One-click conversion with funnel reporting



Everything a **broker** needs

Every module ships as standard — no per-feature pricing, no surprise add-ons.

01

Client Portal

Registration, profile, live & demo accounts, deposits, withdrawals and internal transfers — responsive on every device.

02

MT4 / MT5 Integration

Automated account creation, real-time balance sync, deposits pushed straight to the trading server.

03

IB & Partner Program

Multi-tier structures, per-lot rebates, revenue share and CPA with automated commission calculation.

04

Payment Gateways

Crypto, cards and local PSPs pre-integrated — enable, hide or geo-target any gateway with one switch.

05

KYC & Compliance

Document requests and approvals, verification gates on funding and withdrawals, full audit trail.

06

Leads & Sales Desk

Lead capture, assignment and per-agent scoping — convert lead to client in one click.

07

Omni-channel Comms

WhatsApp inbox, cloud softphone and branded email templates — all inside the CRM.

08

Bonuses & Campaigns

Deposit bonuses with wagering rules, referral rewards and tracked marketing campaigns.

09

Reports & Exports

Deposits, withdrawals, commissions and KYC reporting — CSV exports and live dashboards.

10

Roles & Security

Granular role-based access, live admin roster, session & IP tracking, activity logs on every action.

11

Multi-language

Localized client area out of the box — serve clients in the languages your markets speak.

12

API & Integrations

Secure APIs connect your website, landing pages and mobile apps straight into the CRM.

Plugs into **your stack**

Trading servers, payment rails and communication channels — pre-wired. Need something else? We integrate it during onboarding.

TRADING PLATFORMS

MetaTrader 4

MetaTrader 5

Web Trader

Mobile Apps

COMMUNICATION

WhatsApp Business

Twilio Voice & SMS

Cloud Softphone

Branded Email

PAYMENTS & CRYPTO

USDT · TRC20 / BEP20

Sticpay

Binance Pay

Local PSP rails

Bank wire

Cards

COMPLIANCE & SECURITY

Document KYC

AML workflows

Geo-targeting rules

Roles & audit logs

04.B / BUILD VS BUY

Building it in-house

what brokers actually spend

- ✗ \$150k–\$400k development cost before launch
- ✗ 12–18 months to a first usable version
- ✗ A permanent dev team just to maintain it
- ✗ Every gateway & MT5 integration built from zero

THE SHORTCUT

With our Forex CRM

one license, everything included

- ✓ Live in weeks — branded, integrated, tested
- ✓ One predictable license, no per-feature add-ons
- ✓ Updates & support included — we maintain it
- ✓ Battle-tested daily on live brokerages

Live in weeks, **not months**

05

01**Discovery & Branding**

We map your brokerage model, then theme the CRM to your brand and domain.

02**Integrations**

Trading platform, payment gateways and comms wired up and tested.

03**Migration & Training**

Clients and IB structures imported; your team trained on the back office.

04**Go-Live & Support**

Launch with monitoring, updates and a support line that answers.

Q1	Is the CRM white-label?	Fully — your logo, colors and domain. Clients and IBs only ever see your brand.
Q2	Can we host it ourselves?	Yes — self-hosted on your servers with full data ownership, or fully-managed by us.
Q3	Can you migrate our data?	Clients, accounts, balances and IB structures imported and verified before go-live.
Q4	What does it cost?	One license scoped to your size — every module included. Request a demo, same-day quote.

See the CRM **in action**

Book a live demo — we'll walk you through the client portal, back office and IB engine on a live system, then quote the same day.

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WEB

btsfxprotech.com/forex-crm

SCAN FOR THE
LIVE PRODUCT PAGE