



TradeTools**Fx**

TTFX Manager Portal for MetaTrader 5

Manager's manual

V 1.0.0



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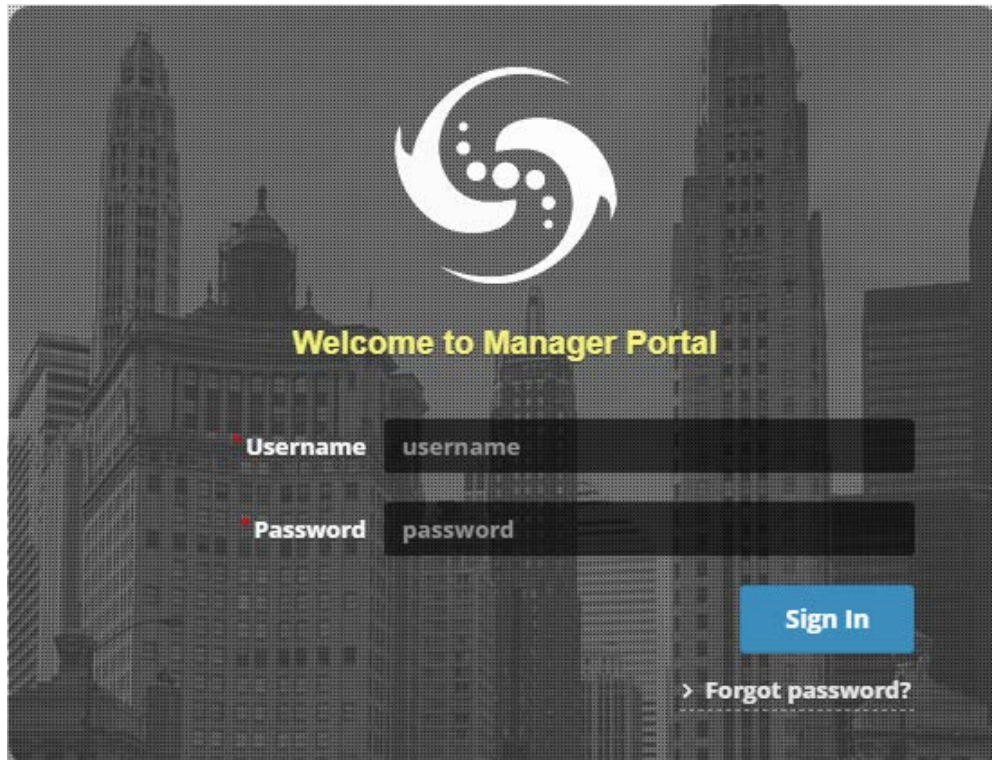
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1 LOGIN TO THE SYSTEM



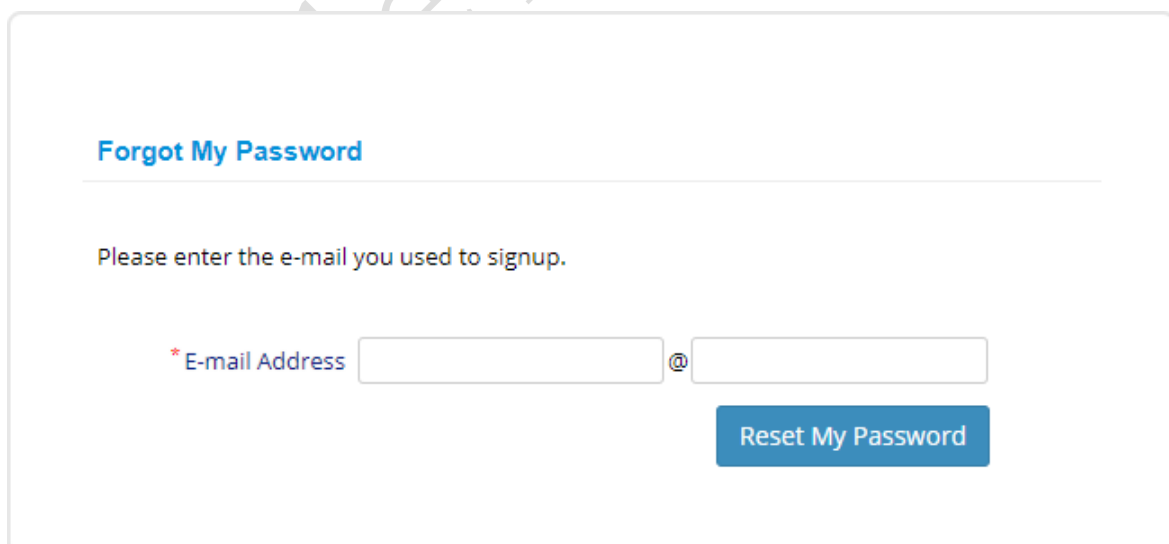
The screenshot shows a login interface for the Manager Portal. At the top center is a white circular logo with a stylized 'S' shape and three dots. Below the logo, the text "Welcome to Manager Portal" is displayed in yellow. There are two input fields: "Username" with the placeholder text "username" and "Password" with the placeholder text "password". A blue "Sign In" button is located to the right of the password field. Below the button is a link that says "> Forgot password?". The background is a grayscale image of a city skyline.

Fig. 1. Login form.

To log in, type **MetaTrader** user login in **Username** field and **MetaTrader** user password in **Password** field and click **Sign In** button. To get the login and password, contact the administrator.

1.1 Password recovery

If you forgot your password, you can use **Forgot password?** link to reset it.



The screenshot shows a password recovery form. At the top, the text "Forgot My Password" is displayed in blue. Below this, a horizontal line separates the title from the instructions: "Please enter the e-mail you used to signup." There are two input fields for the email address, separated by an "@" symbol. The first field is labeled "* E-mail Address". Below the input fields is a blue "Reset My Password" button.

Fig. 2. Password recovery form.

Type your e-mail address and click **Reset My Password** button. The system will send email to your e-mail address. To reset your password, follow the instructions in the email.

1.2 User management

To access the user control panel, click on the user name in the right top corner.

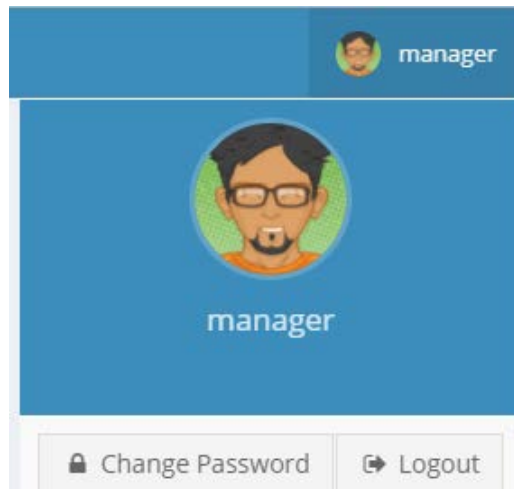
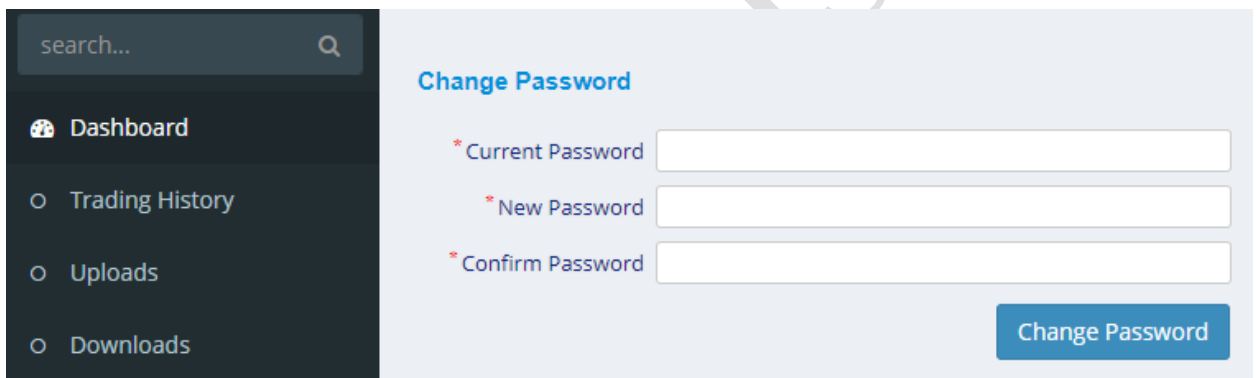


Fig. 3. Control panel.

1.2.1 Password change

To change your password, click **Change Password** button.



The image shows a 'Change Password' form. On the left is a dark sidebar with a search bar and menu items: 'Dashboard', 'Trading History', 'Uploads', and 'Downloads'. The main form area has the title 'Change Password' and three input fields labeled '* Current Password', '* New Password', and '* Confirm Password'. A blue 'Change Password' button is located at the bottom right of the form.

Fig. 4. Change password form.

Type your old password and new password and click **Change Password** button.

1.2.2 Logout

To log out, click **Logout** button.

2 DASHBOARD

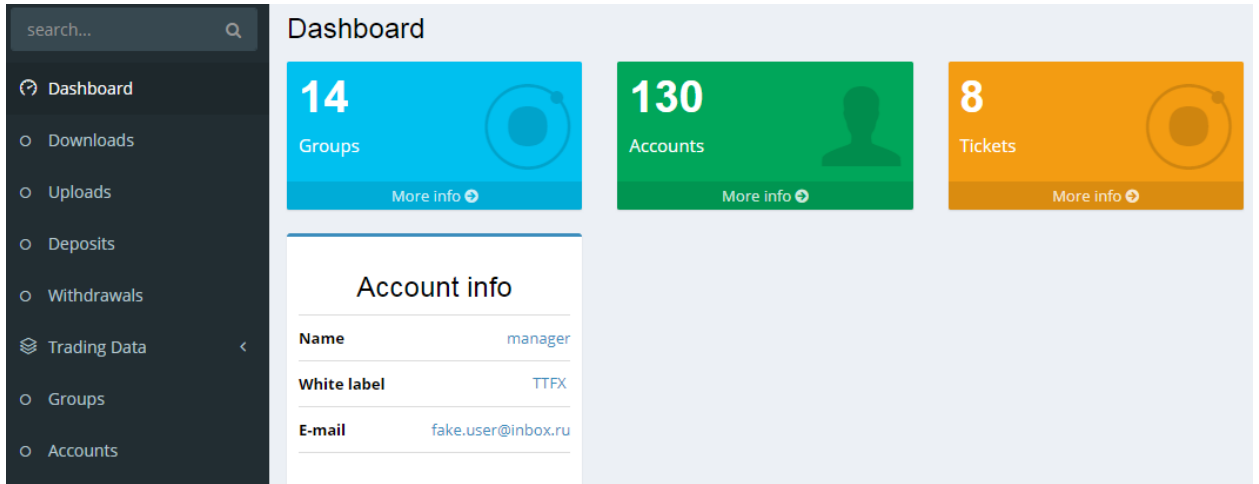


Fig. 5. Dashboard.

Dashboard displays general manager information: available groups count, accounts count, **Tickets** count, and manager **Name**, **White Label** controlled by manager and his **E-mail** address.

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3 DOWNLOADS

3.1 List

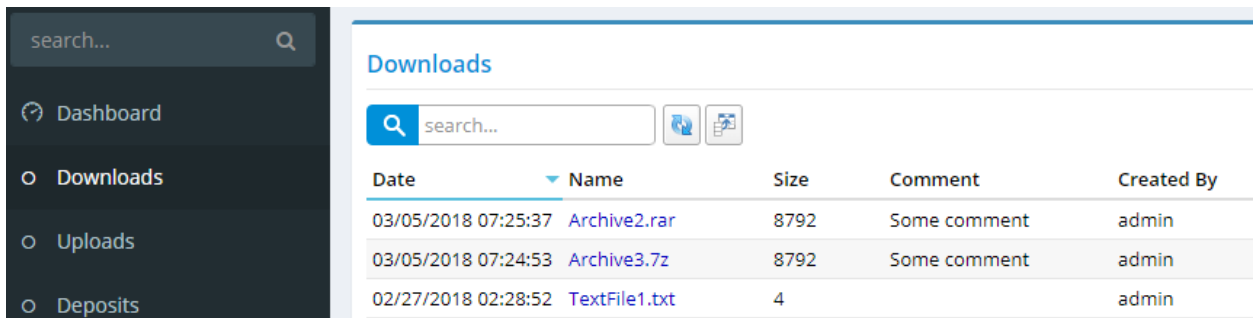


Fig. 6. List of downloads.

search... – search by download name.

3.2 View download



Fig. 7. Download view form.

3.2.1 Fields

Date – download creation date and time.

Name – download name, is the name of file.

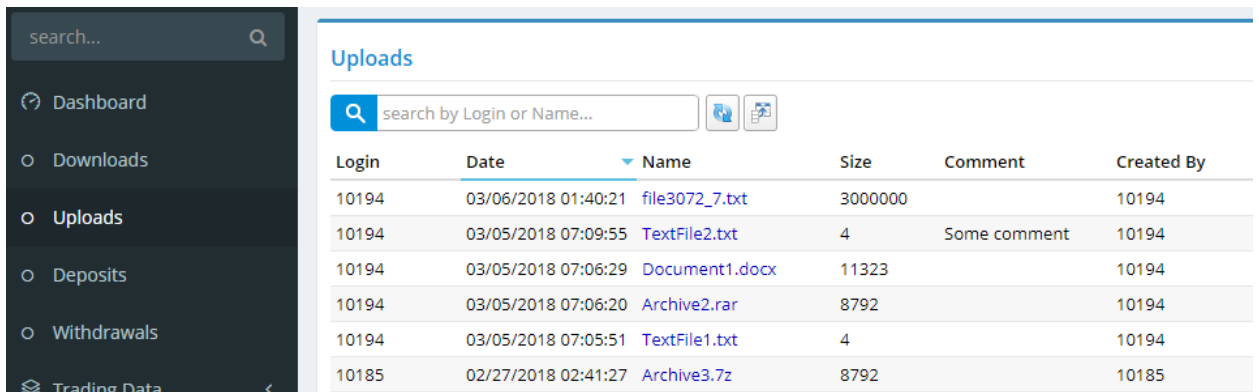
File – uploaded file.

Comment – download comment.

Created By – download creator.

4 UPLOADS

4.1 List



Login	Date	Name	Size	Comment	Created By
10194	03/06/2018 01:40:21	file3072_7.txt	3000000		10194
10194	03/05/2018 07:09:55	TextFile2.txt	4	Some comment	10194
10194	03/05/2018 07:06:29	Document1.docx	11323		10194
10194	03/05/2018 07:06:20	Archive2.rar	8792		10194
10194	03/05/2018 07:05:51	TextFile1.txt	4		10194
10185	02/27/2018 02:41:27	Archive3.7z	8792		10185

Fig. 8. List of uploads.

search by Login or Name... – search by client login or upload name.

4.2 View upload

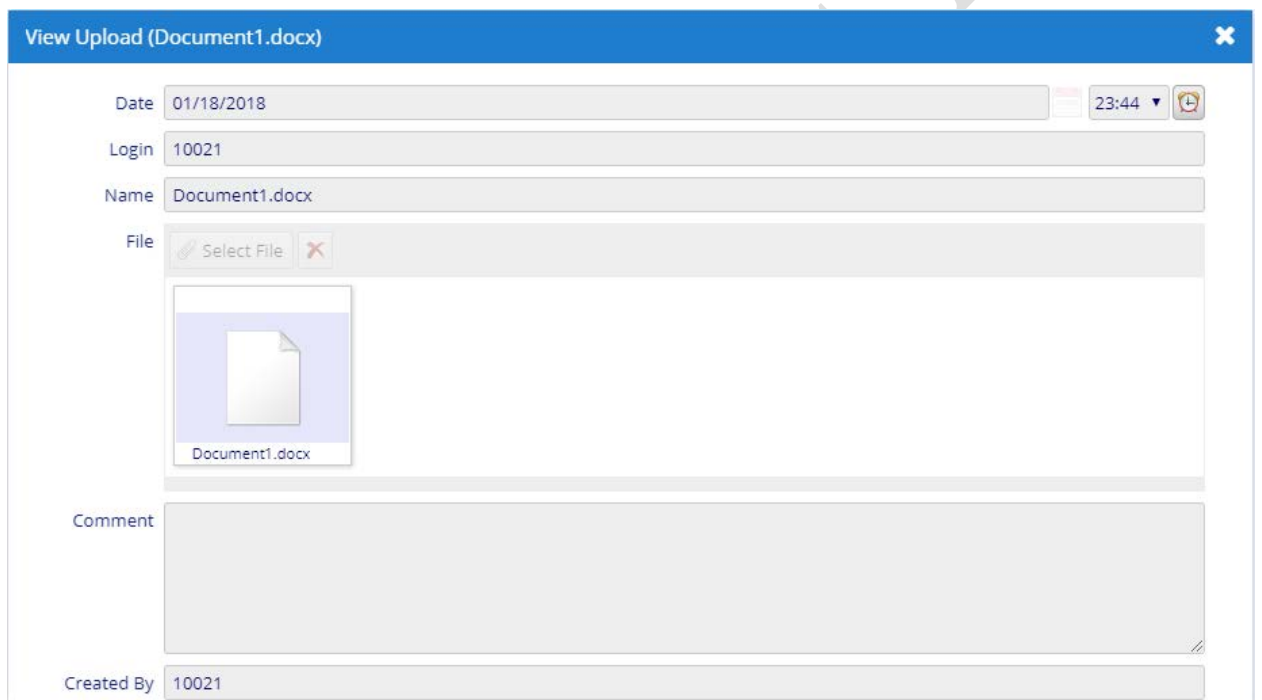


Fig. 9. Upload view form.

4.2.1 Fields

Date – upload creation date and time.

Login – client login.

Name – upload name, is the name of file.

File – uploaded file.

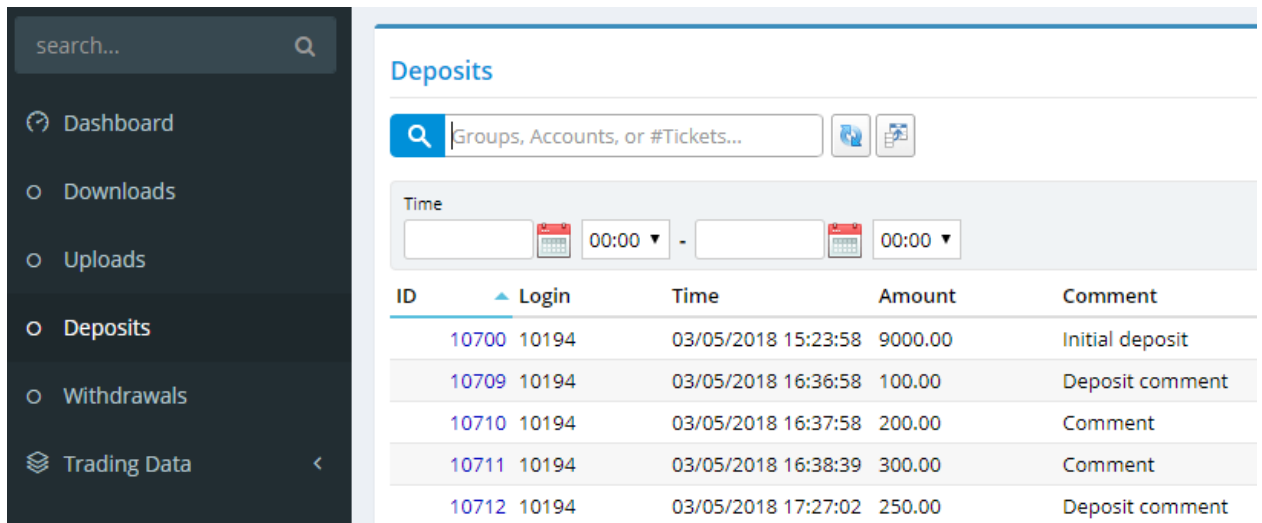
Comment – upload comment.

Created by – upload creator.

5 DEPOSITS

5.1 List

This list displays **MetaTrader** balance transaction.



ID	Login	Time	Amount	Comment
10700	10194	03/05/2018 15:23:58	9000.00	Initial deposit
10709	10194	03/05/2018 16:36:58	100.00	Deposit comment
10710	10194	03/05/2018 16:37:58	200.00	Comment
10711	10194	03/05/2018 16:38:39	300.00	Comment
10712	10194	03/05/2018 17:27:02	250.00	Deposit comment

Fig. 10. List of deposit transactions.

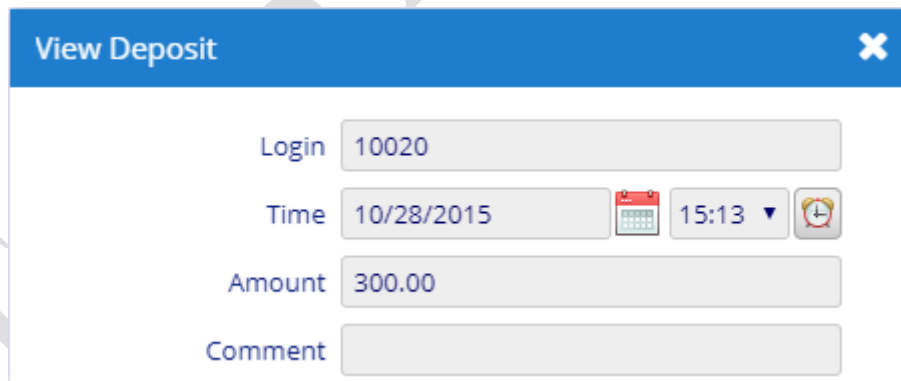
Groups, Accounts, or #Tickets... – search by list of **MetaTrader** groups, accounts or tickets, separated by comas. If you specify ‘*’ character all balance transactions for all available groups will be selected.

ATTENTION: MT5 Manager API, USED BY PORTAL, LIMITS NUMBER OF RETURNED RECORDS. IT IS POSSIBLE LONG-TIME REQUEST PROCESSING OR LACK OF RESULT DATA IF YOU REQUEST BY A LOT OF GROUPS OR USE ‘*’ CHARACTER.

5.1.1 Filters

Time – filtering by transaction date and time.

5.2 View deposit



View Deposit

Login: 10020

Time: 10/28/2015 15:13

Amount: 300.00

Comment:

Fig. 11. Deposit transaction view form.

5.2.1 Fields

Login – **MetaTrader** user login.

Time – deposit transaction date and time.

Amount – transaction amount.

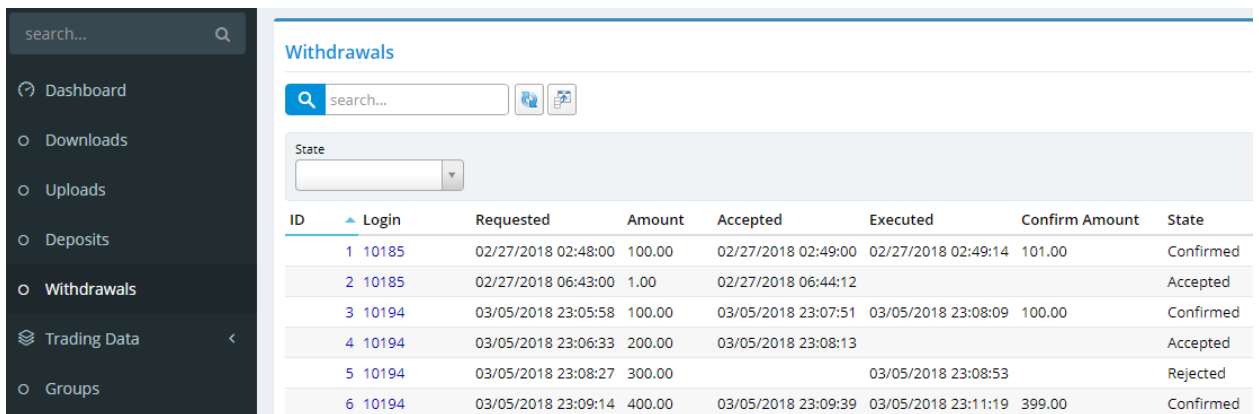
Comment – comment.

6 WITHDRAWALS

This section is designed to withdraw funds from the client's account.

The withdrawals of funds is made in two steps: creation of the request by the client; request processing by the manager.

6.1 List



ID	Login	Requested	Amount	Accepted	Executed	Confirm Amount	State
1	10185	02/27/2018 02:48:00	100.00	02/27/2018 02:49:00	02/27/2018 02:49:14	101.00	Confirmed
2	10185	02/27/2018 06:43:00	1.00	02/27/2018 06:44:12			Accepted
3	10194	03/05/2018 23:05:58	100.00	03/05/2018 23:07:51	03/05/2018 23:08:09	100.00	Confirmed
4	10194	03/05/2018 23:06:33	200.00	03/05/2018 23:08:13			Accepted
5	10194	03/05/2018 23:08:27	300.00		03/05/2018 23:08:53		Rejected
6	10194	03/05/2018 23:09:14	400.00	03/05/2018 23:09:39	03/05/2018 23:11:19	399.00	Confirmed

Fig. 12. List of withdrawal requests.

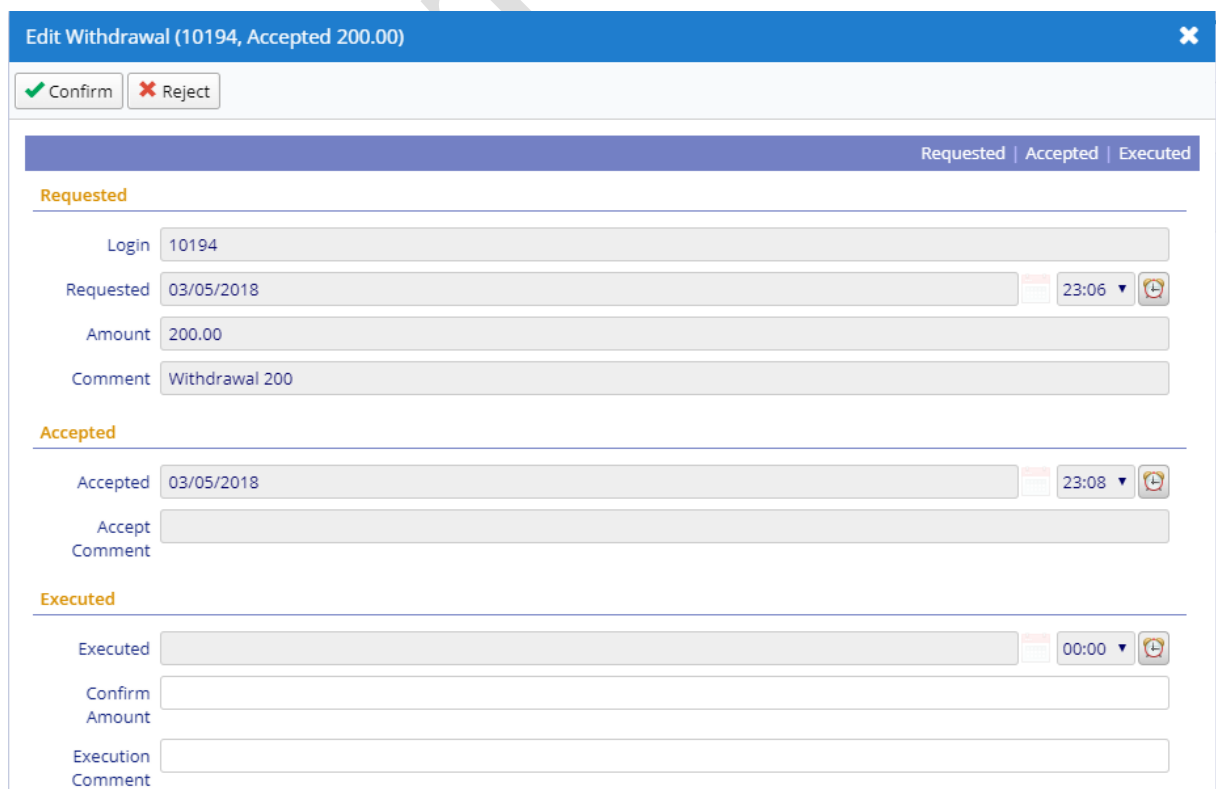
search... - search by user login.

6.1.1 Filters

State – filtering by request state. Available values:

- **Requested** – newly created request;
- **Accepted** – request is accepted by the manager;
- **Confirmed** – request is executed by the manager;
- **Rejected** – request is cancelled by the manager.

6.2 Edit withdrawal



Edit Withdrawal (10194, Accepted 200.00)
✕

Confirm
 Reject

Requested | Accepted | Executed

Requested

Login:

Requested:

Amount:

Comment:

Accepted

Accepted:

Accept Comment:

Executed

Executed:

Confirm Amount:

Execution Comment:

Fig. 13. Withdrawal edit form.

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Phone: +1.312.772.2081 | Email: info@TradeToolsFX.com | Web: www.TradeToolsFX.com

6.2.1 Fields

Login – user login, request creator.

Requested – request creation date and time.

Amount – requested amount.

Comment – comment.

Accepted – request accepting date and time.

Accepted Comment – accepting comment.

Executed – request execution or rejection date and time.

Confirm Amount – request amount, can differ from requested amount.

Execution Comment – request execution or rejection comment.

6.2.2 Actions

Accept – accepting request to work.

Confirm – confirmation of request execution.

Reject – request rejection.

6.3 Withdrawal processing

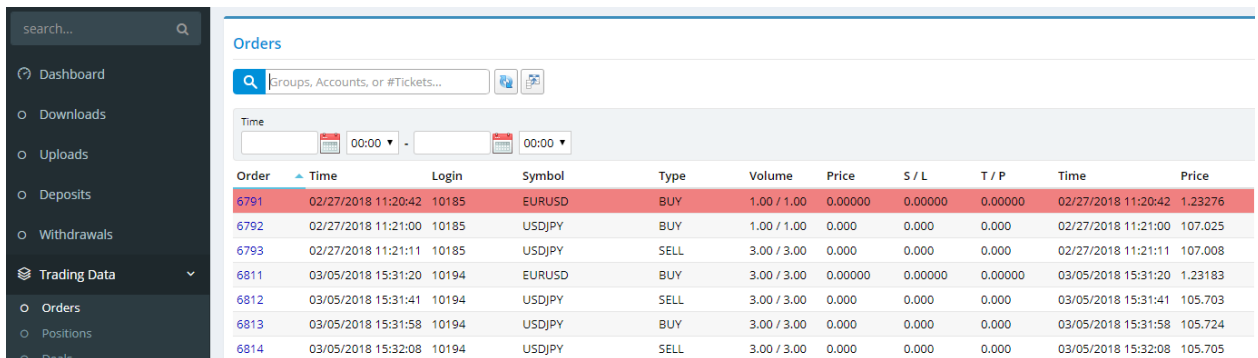
Client (trader) create withdrawal request using Trader Portal. This request has status **Requested** and it is accessible for client's White Label manager. Manager can reject (action **Reject** – state is changing to **Rejected**) or accept (action **Accept** – state is changing to **Accepted**) this request. After the transfer of funds to the client's account is completed, manager changes state of request to **Confirmed** (action **Confirm**), specifying transferred amount (transferred amount can be differ from requested amount).

7 TRADING DATA

7.1 Orders

This list contains **MetaTrader** orders.

7.1.1 List



Order	Time	Login	Symbol	Type	Volume	Price	S / L	T / P	Time	Price
6791	02/27/2018 11:20:42	10185	EURUSD	BUY	1.00 / 1.00	0.00000	0.00000	0.00000	02/27/2018 11:20:42	1.23276
6792	02/27/2018 11:21:00	10185	USDJPY	BUY	1.00 / 1.00	0.000	0.000	0.000	02/27/2018 11:21:00	107.025
6793	02/27/2018 11:21:11	10185	USDJPY	SELL	3.00 / 3.00	0.000	0.000	0.000	02/27/2018 11:21:11	107.008
6811	03/05/2018 15:31:20	10194	EURUSD	BUY	3.00 / 3.00	0.00000	0.00000	0.00000	03/05/2018 15:31:20	1.23183
6812	03/05/2018 15:31:41	10194	USDJPY	SELL	3.00 / 3.00	0.000	0.000	0.000	03/05/2018 15:31:41	105.703
6813	03/05/2018 15:31:58	10194	USDJPY	BUY	3.00 / 3.00	0.000	0.000	0.000	03/05/2018 15:31:58	105.724
6814	03/05/2018 15:32:08	10194	USDJPY	SELL	3.00 / 3.00	0.000	0.000	0.000	03/05/2018 15:32:08	105.705

Fig. 14. List of orders.

Groups, Accounts, or #Tickets... – search by list of **MetaTrader** groups, accounts or tickets, separated by comas. If you specify ‘*’ character all orders for all available groups will be selected.

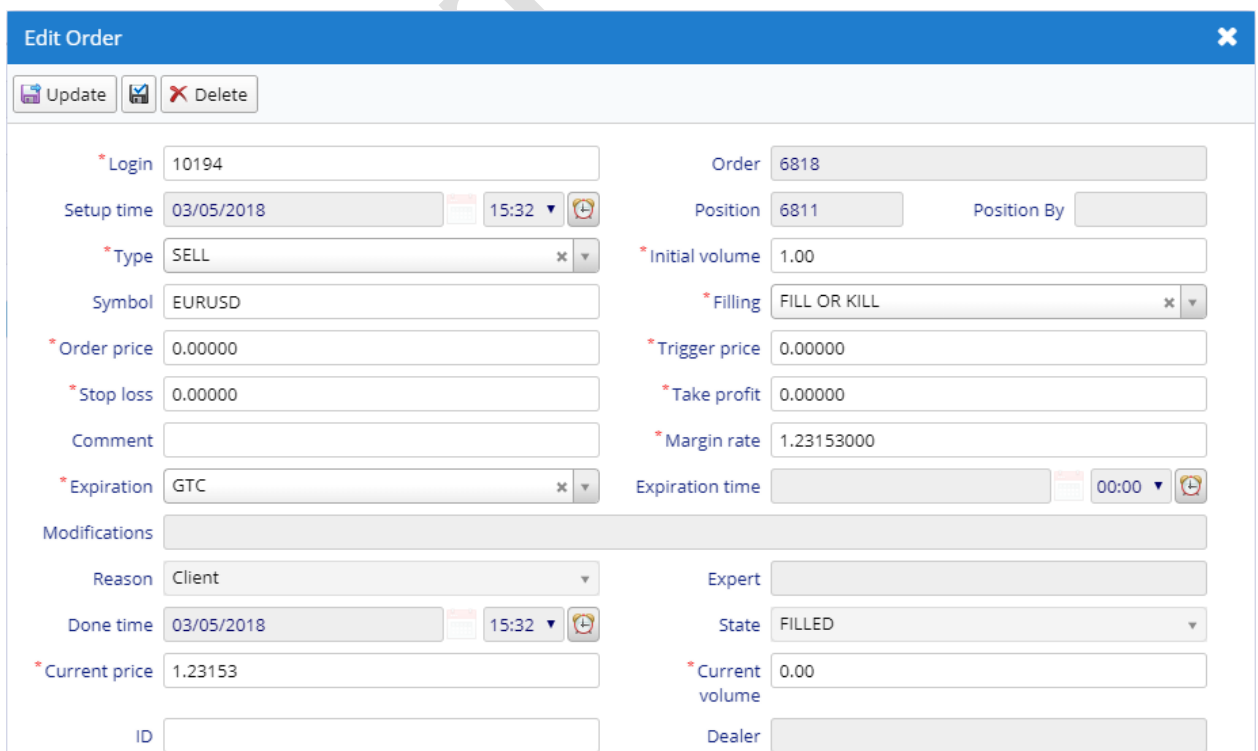
ATTENTION: MT5 Manager API, USED BY PORTAL, LIMITS NUMBER OF RETURNED RECORDS. IT IS POSSIBLE LONG-TIME REQUEST PROCESSING OR LACK OF RESULT DATA IF YOU REQUEST BY A LOT OF GROUPS OR USE ‘*’ CHARACTER.

Modifications – If order was modified, using API or **MT5 Manager** terminal or **MT5 Administrator** terminal it will be highlighted in red.

7.1.1.1 Filters

Time – the order placing period.

7.1.2 Edit order



Edit Order
✕

Update
Delete

* Login: 10194

Setup time: 03/05/2018 15:32

* Type: SELL

Symbol: EURUSD

* Order price: 0.00000

* Stop loss: 0.00000

Comment:

* Expiration: GTC

Modifications:

Reason: Client

Done time: 03/05/2018 15:32

* Current price: 1.23153

ID:

Order: 6818

Position: 6811

* Initial volume: 1.00

* Filling: FILL OR KILL

* Trigger price: 0.00000

* Take profit: 0.00000

* Margin rate: 1.23153000

Expiration time: 00:00

Expert:

State: FILLED

* Current volume: 0.00

Dealer:

Fig. 15. Order edit form.

7.1.2.1 Fields

Login – login of the client, to whom the order belongs.

Order – ticket of an order.

Setup time – order placing time.

Position – position ID (ticket) specified in the order.

Position By – ID (ticket) of the opposite position specified in the order.

Type – order type (buy, sell, sell limit, buy limit, buy stop, sell stop, buy stop limit, sell stop limit, close by).

Initial volume – ID (ticket) of the opposite position specified in the order.

Symbol – symbol of an order.

Filling – order filling type (FOK, IOC, RETURN).

Order price – price, at which the order was placed.

Trigger price – price, at which a Limit order is placed when the Stop Limit order triggers.

Stop loss – the Stop Loss level of an order.

Take profit – the Take Profit level of an order.

Comment – comment.

Margin rate – the conversion rate of the symbol margin currency to the client's deposit currenc, which is used for calculating the margin for an order.

Expiration – the order expiration type (GTC, DAY, SPECIFIED, SPECIFIED DAY).

Expiration time – the order expiration time.

Modifications – the order modification flags. The flags allow defining if an order was changed manually by an administrator, manager or API.

Reason – the reason for placing an order.

Expert – the ID of the Expert Advisor that has placed the order.

Done time – the order execution time.

State – the current state of an order.

Current price – the current price of the symbol, for which an order has been placed.


Current volume – the current unfilled volume of an order.

ID – the order ID in external trading systems.

Dealer – the login of a dealer, who has processed an order.

7.1.2.2 Actions

Update – save changes and close the form.

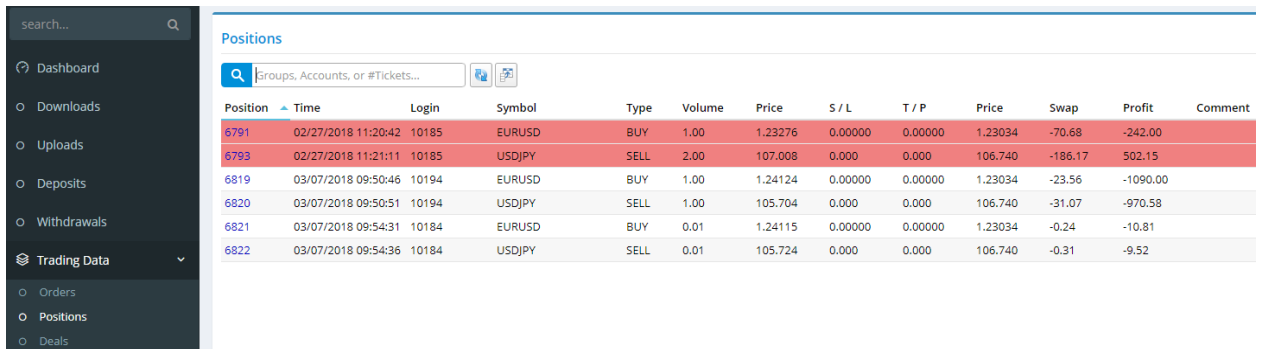
Apply changes  – save changes (form remains open).

Delete – delete.

7.2 Positions

This list contains **MetaTrader** positions.

7.2.1 List



Position	Time	Login	Symbol	Type	Volume	Price	S / L	T / P	Price	Swap	Profit	Comment
6791	02/27/2018 11:20:42	10185	EURUSD	BUY	1.00	1.23276	0.00000	0.00000	1.23034	-70.68	-242.00	
6793	02/27/2018 11:21:11	10185	USDJPY	SELL	2.00	107.008	0.000	0.000	106.740	-186.17	502.15	
6819	03/07/2018 09:50:46	10194	EURUSD	BUY	1.00	1.24124	0.00000	0.00000	1.23034	-23.56	-1090.00	
6820	03/07/2018 09:50:51	10194	USDJPY	SELL	1.00	105.704	0.000	0.000	106.740	-31.07	-970.58	
6821	03/07/2018 09:54:31	10184	EURUSD	BUY	0.01	1.24115	0.00000	0.00000	1.23034	-0.24	-10.81	
6822	03/07/2018 09:54:36	10184	USDJPY	SELL	0.01	105.724	0.000	0.000	106.740	-0.31	-9.52	

Fig. 16. List of the positions.

Groups, Accounts, or #Tickets... – search by list of **MetaTrader** groups, accounts or tickets, separated by comas. If you specify ‘*’ character all positions for all available groups will be selected.

ATTENTION: MT5 Manager API, USED BY PORTAL, LIMITS NUMBER OF RETURNED RECORDS. IT IS POSSIBLE LONG-TIME REQUEST PROCESSING OR LACK OF RESULT DATA IF YOU REQUEST BY A LOT OF GROUPS OR USE ‘*’ CHARACTER.

Modifications – If position was modified, using API or **MT5 Manager** terminal or **MT5 Administrator** terminal it will be highlighted in red.

7.2.2 Edit position

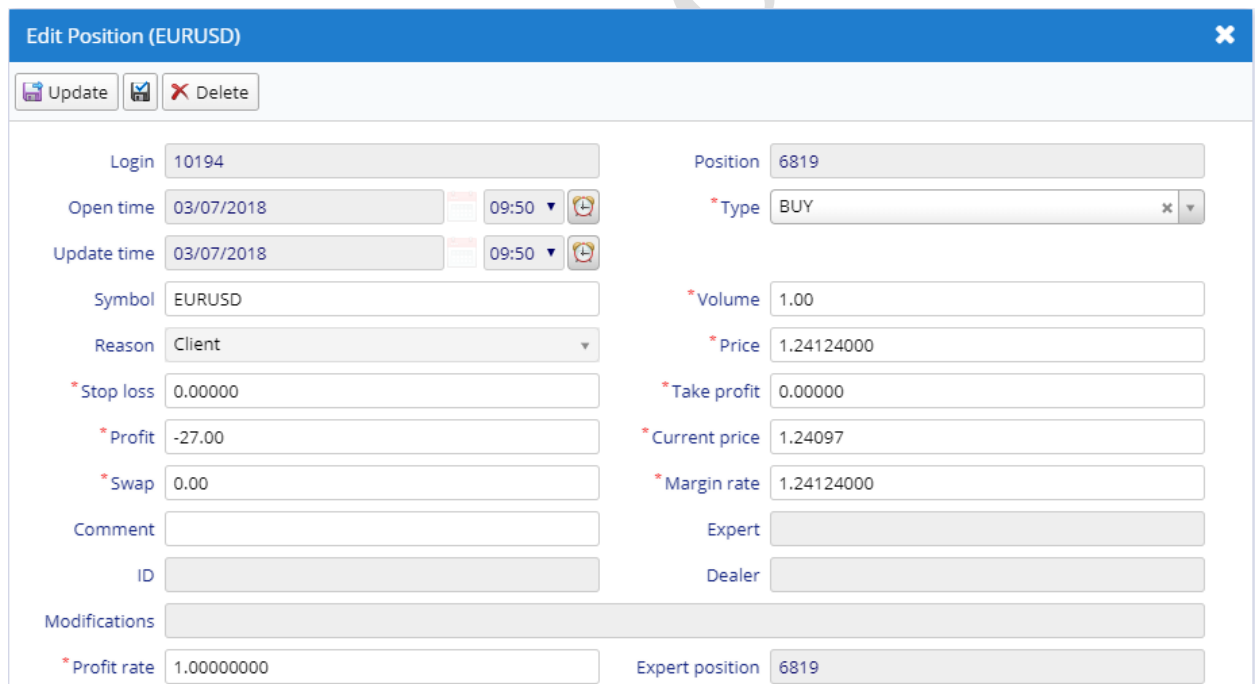


Fig. 17. Position edit form.

7.2.2.1 Fields

Login – the login of the client, to whom the trade position belongs.

Position – the ticket (a unique number) of a trade position in the **MetaTrader 5** platform.

Open time – position creation time.

Type – position type (buy, sell).

Update time – the time of the last modification of a trade position.

Symbol – the symbol of a trade position.

Volume – the volume of a trade position.

Reason – the reason for position opening.

Price - the weighted average open price of a position.

Stop loss – the Stop Loss level of a trade position.

Take profit – the Take Profit level of a trade position.

Profit – the current profit/loss of a trade position.

Current price – the current price of the symbol, for which a trade position has been opened.

Swap – the swap size for a position.

Margin rate – the exchange rate of the margin currency of a position to the client's deposit currency.

Comment – comment.

Expert – the ID of the Expert Advisor that has opened the position.

ID – the ticket (a unique number) of a position in an external trading system.

Dealer – the login of a dealer, who has processed the order that opened the position.


Modifications – position modification flags. The flags allow defining if a position was changed manually by an administrator, a manager or by API.

Profit rate – the exchange rate of the profit currency of a position to the deposit currency of a client group.

Expert position – the ID of a position.

7.2.2.2 Actions

Update – save changes and close the form.

Apply changes  – save changes (form remains open).

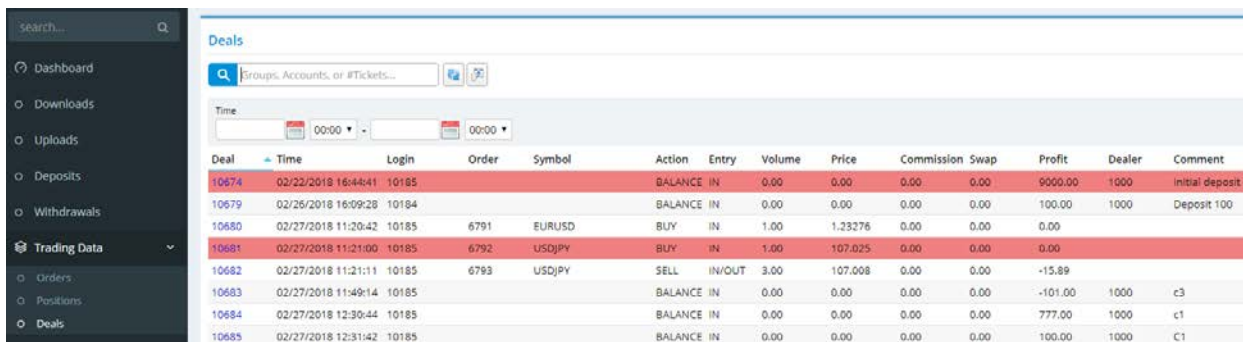
Delete – delete.

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7.3 Deals

This list contains **MetaTrader** deals.

7.3.1 List



Deal	Time	Login	Order	Symbol	Action	Entry	Volume	Price	Commission	Swap	Profit	Dealer	Comment
10674	02/22/2018 16:44:41	10185			BALANCE IN		0.00	0.00	0.00	0.00	9000.00	1000	Initial deposit
10679	02/26/2018 16:09:28	10184			BALANCE IN		0.00	0.00	0.00	0.00	100.00	1000	Deposit 100
10680	02/27/2018 11:20:42	10185	6791	EURUSD	BUY IN		1.00	1.23276	0.00	0.00	0.00		
10681	02/27/2018 11:21:00	10185	6792	USDJPY	BUY IN		1.00	107.025	0.00	0.00	0.00		
10682	02/27/2018 11:21:11	10185	6793	USDJPY	SELL IN/OUT		3.00	107.008	0.00	0.00	-15.89		
10683	02/27/2018 11:49:14	10185			BALANCE IN		0.00	0.00	0.00	0.00	-101.00	1000	c3
10684	02/27/2018 12:30:44	10185			BALANCE IN		0.00	0.00	0.00	0.00	777.00	1000	c1
10685	02/27/2018 12:31:42	10185			BALANCE IN		0.00	0.00	0.00	0.00	100.00	1000	C1

Fig. 18. List of deals.

Groups, Accounts, or #Tickets... – search by list of **MetaTrader** groups, accounts or tickets, separated by comas. If you specify '*' character all deals for all available groups will be selected.

ATTENTION: MT5 Manager API, USED BY PORTAL, LIMITS NUMBER OF RETURNED RECORDS. IT IS POSSIBLE LONG-TIME REQUEST PROCESSING OR LACK OF RESULT DATA IF YOU REQUEST BY A LOT OF GROUPS OR USE '*' CHARACTER.

Modifications – If deal was modified, using API or **MT5 Manager** terminal or **MT5 Administrator** terminal it will be highlighted in red.

7.3.1.1 Filters

Time – deal executing period.

7.3.2 Edit deal

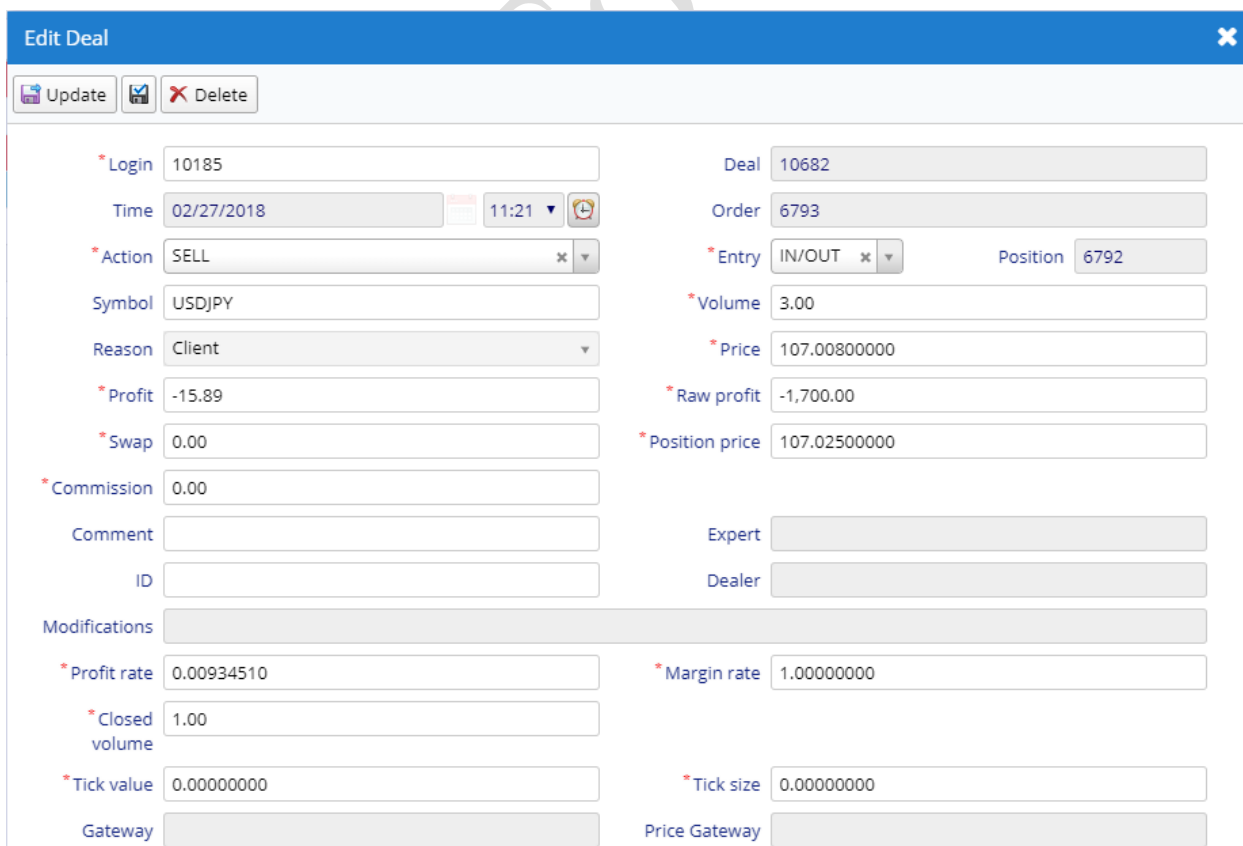



Fig. 19. Deal edit form.

7.3.2.1 Fields

- Login** – the login of the client, to whom the deal belongs.
- Deal** – the ticket of a deal.
- Time** – the time of a deal.
- Order** – the ticket of the order, as a result of which a deal was executed.
- Action** – the type of action performed with a deal.
- Entry** – the direction of a deal.
- Position** – the position ID (ticket) specified in the deal.
- Symbol** – the symbol, for which a deal was executed.
- Volume** – the volume of a deal.
- Reason** – the reason for a deal.
- Price** – the price of a deal.
- Profit** – the value of the profit from the deal execution.
- Raw profit** – the value of profit/loss resulting from the deal execution. The profit/loss is expressed in the profit currency of the symbol, for which a deal is executed.
- Swap** – the swap size for a deal.
- Position price** – the price of the position that was closed by this deal.
- Commission** – the amount of commission charged for a deal.
- Comment** – comment.
- Expert** – the ID of the Expert Advisor that has executed a deal.
- ID** – the deal ID in external trading systems.
- Dealer** – the login of a dealer, who has processed a deal.
- Modifications** – deal modification flags. The flags allow you to keep track of whether a deal has been modified manually by the administrator, manager or API.
- Profit rate** – the exchange rate of the profit currency of a deal to the deposit currency of a client group.
- Margin rate** – the exchange rate of the margin currency of a deal to the client's deposit currency.
- Closed volume** - the position volume that was closed by the deal.
- Tick value** – the tick price for a deal.
- Tick size** – the tick size for a deal.
- Gateway** – the ID of a trade gateway, using which the deal was executed.
- Price gateway** – the actual price of a deal executed via a gateway in an external trading system, not taking into account the gateway price transformation settings.

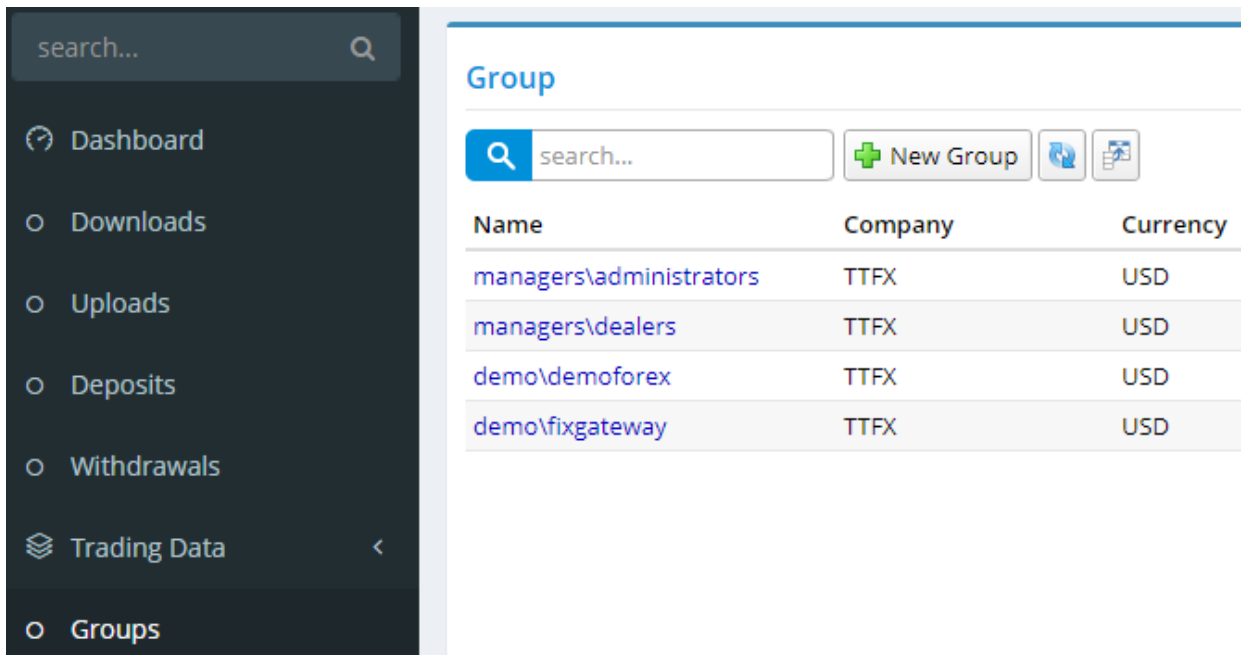
7.3.2.2 Actions

- Update** – save changes and close the form.
- Apply changes**  – save changes (form remains open).
- Delete** – delete.

8 GROUPS

This list contains **MetaTrader** groups.

8.1 List



Name	Company	Currency
managers\administrators	TTFX	USD
managers\dealers	TTFX	USD
demo\demo forex	TTFX	USD
demo\fixgateway	TTFX	USD

Fig. 20. List of groups.

search... - search by group name.

New Group – create new group.

8.2 Create / edit group

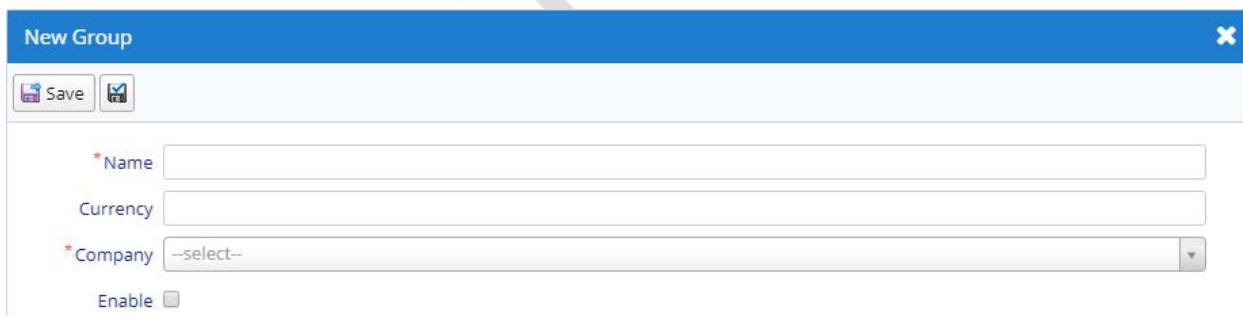


Fig. 21. Group create form.

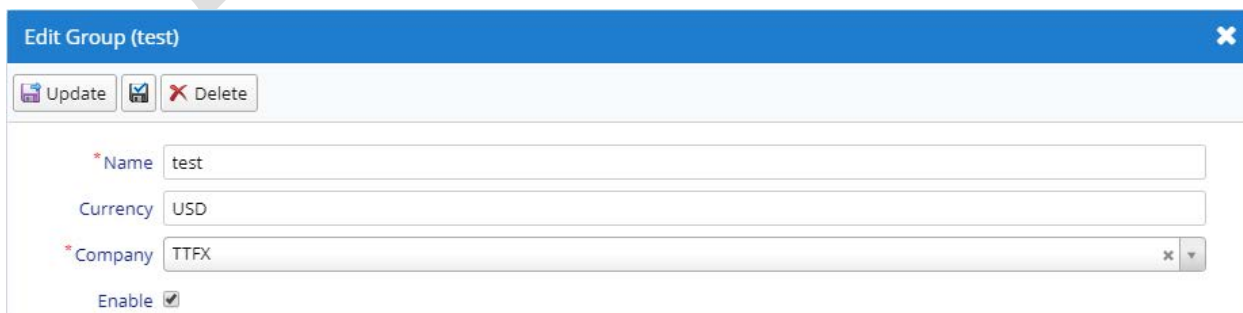


Fig. 22. Group edit form.

8.2.1 Fields

Name – name of a group, including a path to it in accordance with the hierarchy.


Currency – the deposit currency of the group.

Company – the name of the company that services the group (White Label).

Enable – enable / disable group.

8.2.2 Actions

Save / Update – save changes and close the form.

Apply changes  – save changes (form remains open).

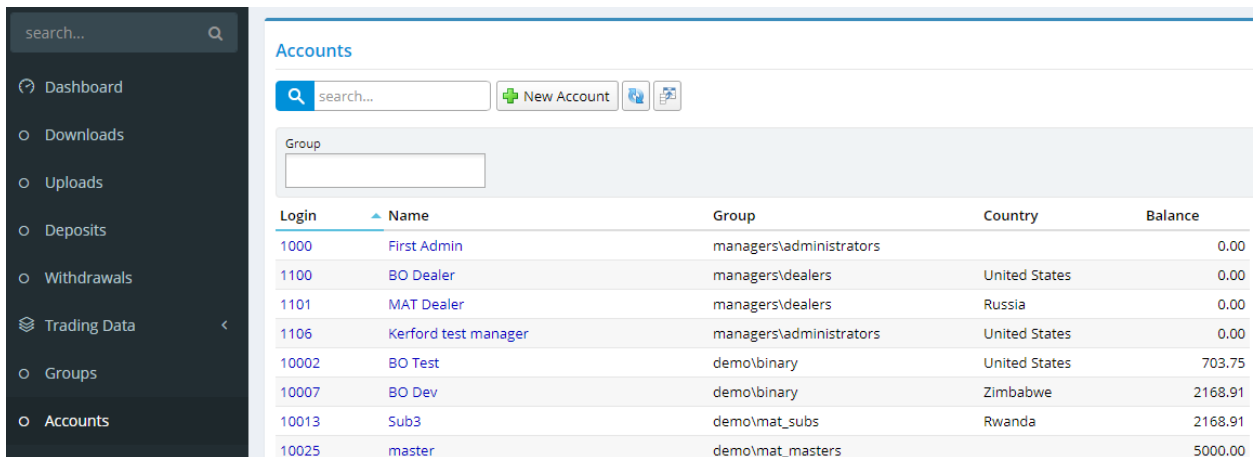
Delete – delete.

TradeToolsFX

9 ACCOUNTS

This list contains **MetaTrader** accounts.

9.1 List



Login	Name	Group	Country	Balance
1000	First Admin	managers\administrators		0.00
1100	BO Dealer	managers\dealers	United States	0.00
1101	MAT Dealer	managers\dealers	Russia	0.00
1106	Kerford test manager	managers\administrators	United States	0.00
10002	BO Test	demo\binary	United States	703.75
10007	BO Dev	demo\binary	Zimbabwe	2168.91
10013	Sub3	demo\mat_subs	Rwanda	2168.91
10025	master	demo\mat_masters		5000.00

Fig. 23. List of accounts.

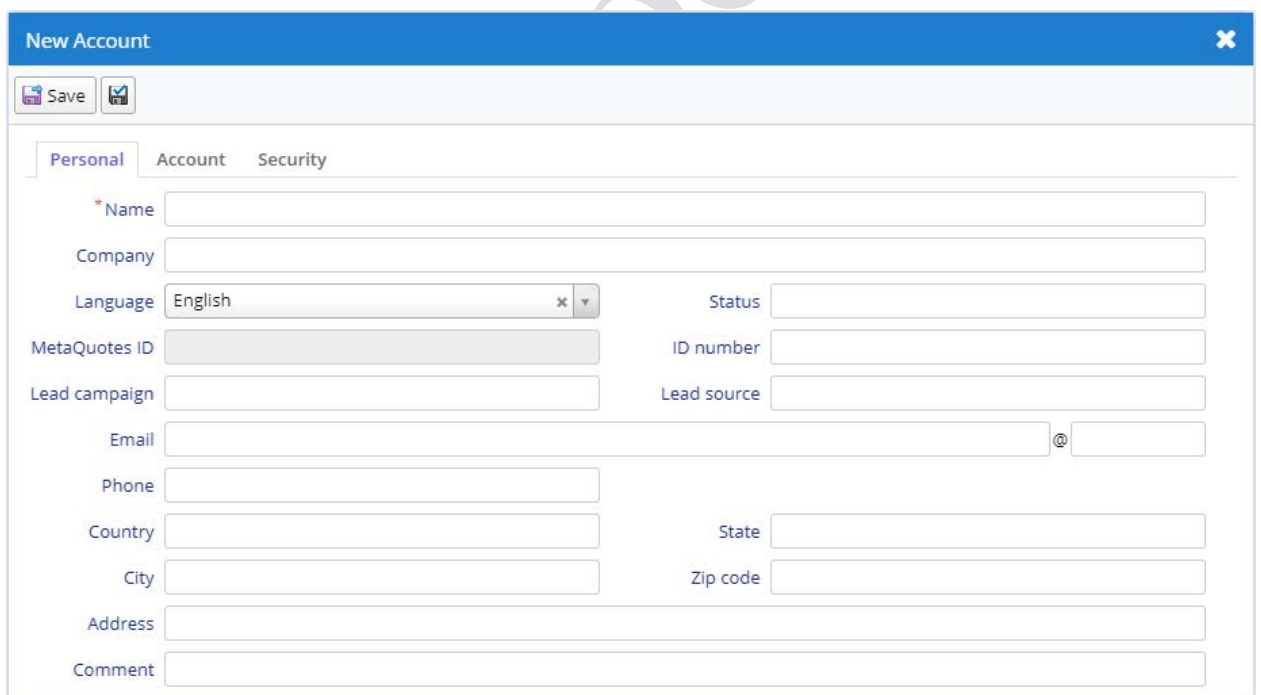
search... - search by account name or login.

New Account – create new account.

9.1.1 Filters

Group – filtering by groups.

9.2 Create / edit account



New Account

Save

Personal Account Security

* Name

Company

Language English Status

MetaQuotes ID ID number

Lead campaign Lead source

Email @

Phone

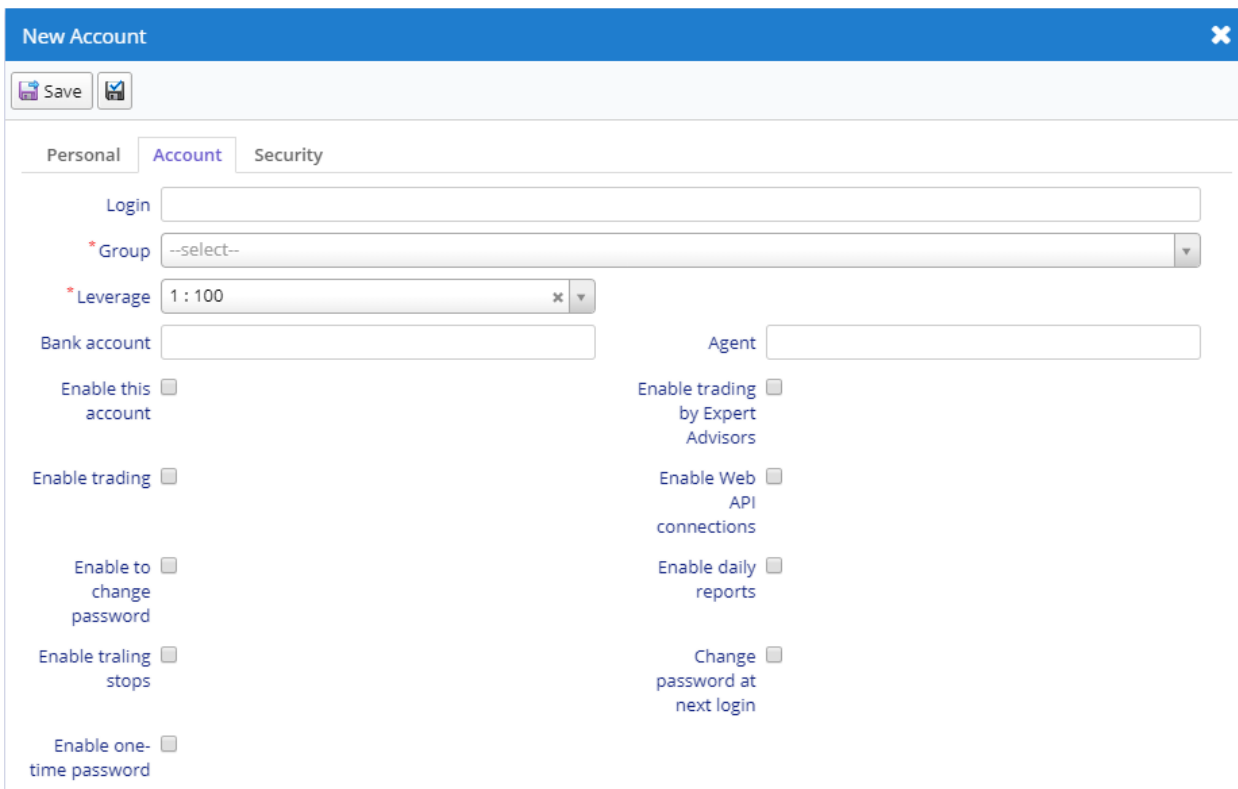
Country State

City Zip code

Address

Comment

Fig. 24. Account create form. Tab **Personal**.



New Account [Close]

Save [Checkmark]

Personal **Account** Security

Login

* Group

* Leverage

Bank account

Agent

Enable this account

Enable trading

Enable to change password

Enable trading stops

Enable one-time password

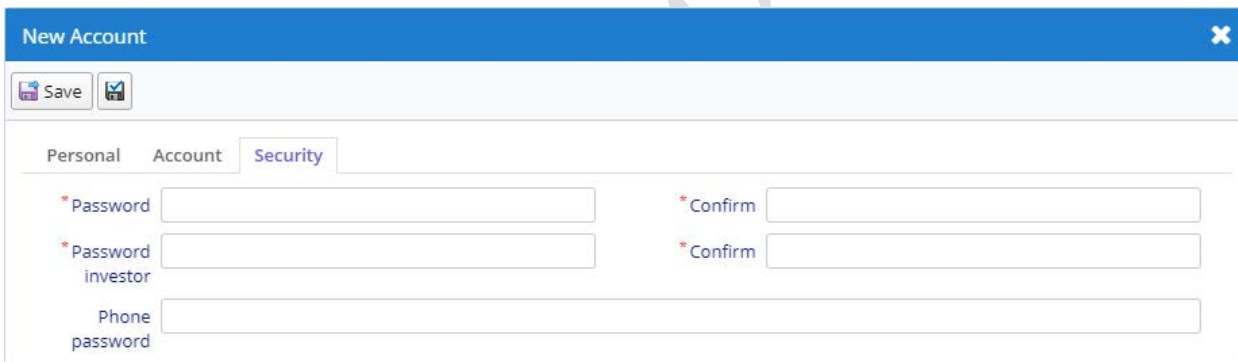
Enable trading by Expert Advisors

Enable Web API connections

Enable daily reports

Change password at next login

Fig. 25. Account create form. Tab Account.



New Account [Close]

Save [Checkmark]

Personal Account **Security**

* Password

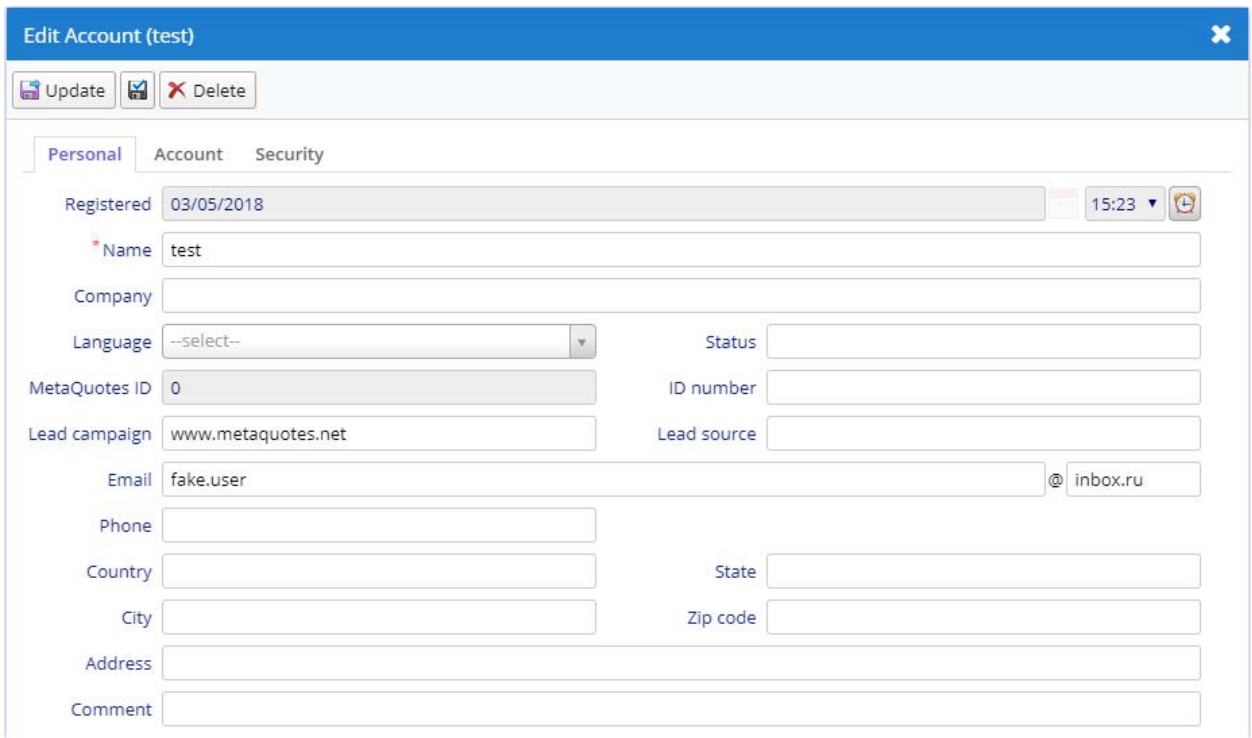
* Confirm

* Password investor

* Confirm

Phone password

Fig. 26. Account create form. Tab Security.



Edit Account (test)

Update Delete

Personal Account Security

Registered: 03/05/2018 15:23

* Name: test

Company:

Language: --select-- Status:

MetaQuotes ID: 0 ID number:

Lead campaign: www.metaquotes.net Lead source:

Email: fake.user @ inbox.ru

Phone:

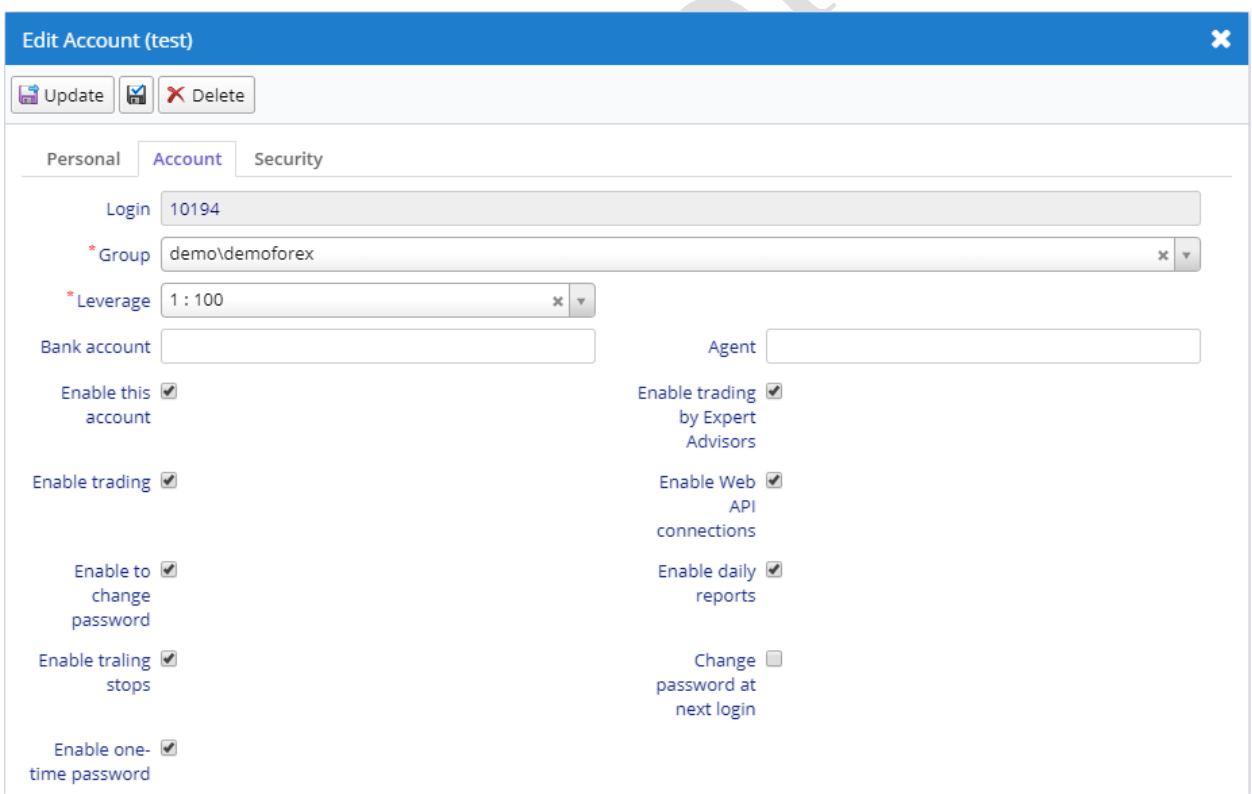
Country: State:

City: Zip code:

Address:

Comment:

Fig. 27. Account edit form. Tab **Personal**.



Edit Account (test)

Update Delete

Personal Account Security

Login: 10194

* Group: demo\demo forex

* Leverage: 1 : 100

Bank account: Agent:

Enable this account

Enable trading

Enable to change password

Enable trading stops

Enable one-time password

Enable trading by Expert Advisors

Enable Web API connections

Enable daily reports

Change password at next login

Fig. 28. Account edit form. Tab **Account**.

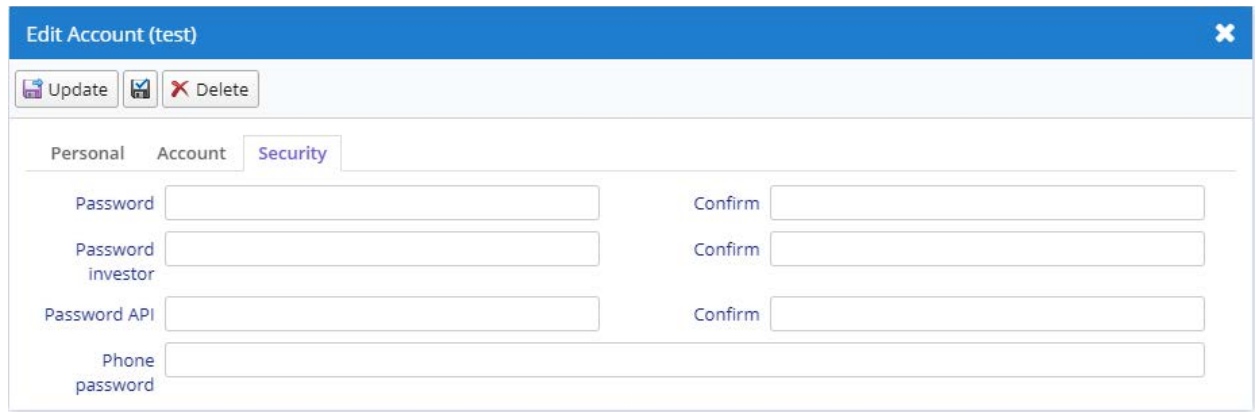


Fig. 29. Account edit form. Tab Security.

9.2.1 Fields

Registered – the client record creation date.

Name – the name of a client.

Company – the name of a client's company.

Language – the user's language.

MetaQuotes ID – the client's MetaQuotes ID.

ID number – the number of a client's identity document. For example, passport number.

Lead campaign – a lead campaign — name of a marketing campaign a client was attracted by.

Lead source – a lead source — a website a client has come from.

Email – the client's email address.

Phone – a client's phone number.

Country – the client's country of residence.

State – a client's state (region) of residence.

City – the client's city of residence.

Zip code – a client's zip code.

Address – the address of a client.

Comment – comment.

Login – the login of a user. When registering a new account, it is permissible not to indicate the number of the new account, in which case it will be filled automatically.

Group – the group to which the user is included.

Leverage – the size of a client's leverage.

Bank account – the number of a client's account in an external trading system.

Agent – the number of a client's agent account.

Enable this account – A user is allowed to connect.

Enable trading – Trading is enabled for a user.

Enable to change password – A user is allowed to change the password.

Enable trailing stops – A user is allowed to use trailing stop.

Enable one-time password – The user can use OTP authentication.

Enable trading by Expert Advisors – A user is allowed to use Expert Advisors.

Enable Web API connections – A user is allowed to connect via API.

Enable daily reports – A user is allowed to view trade reports.

Change password at next login – The user must change password during the next connection.


Password / Confirm – main password / confirm.

Password investor / Confirm – investor password / confirm.

Password API / Confirm – API password / confirm.

9.2.2 Actions

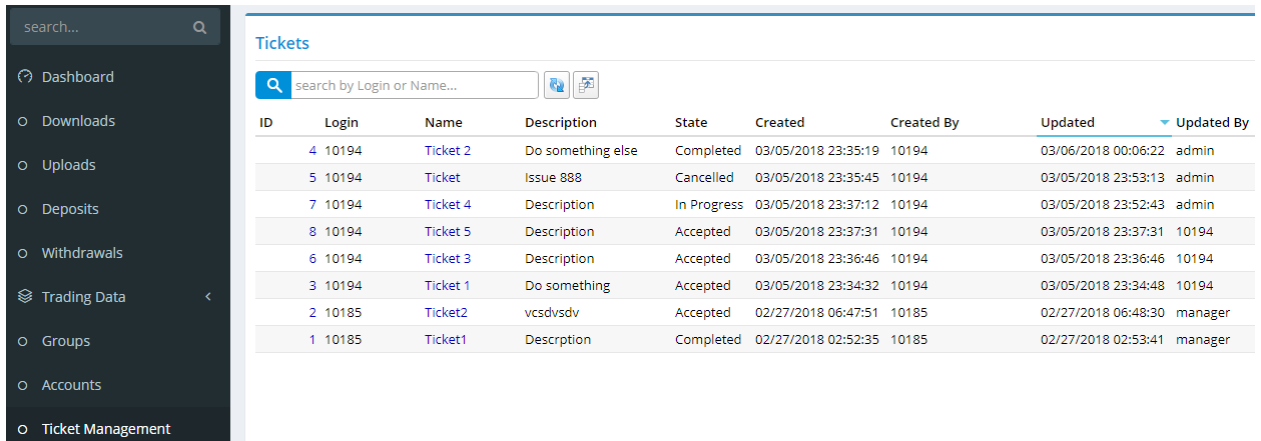
Save / Update – save changes and close the form.

Apply changes  – save changes (form remains open).

Delete – delete.

10 TICKET MANAGEMENT

10.1 List

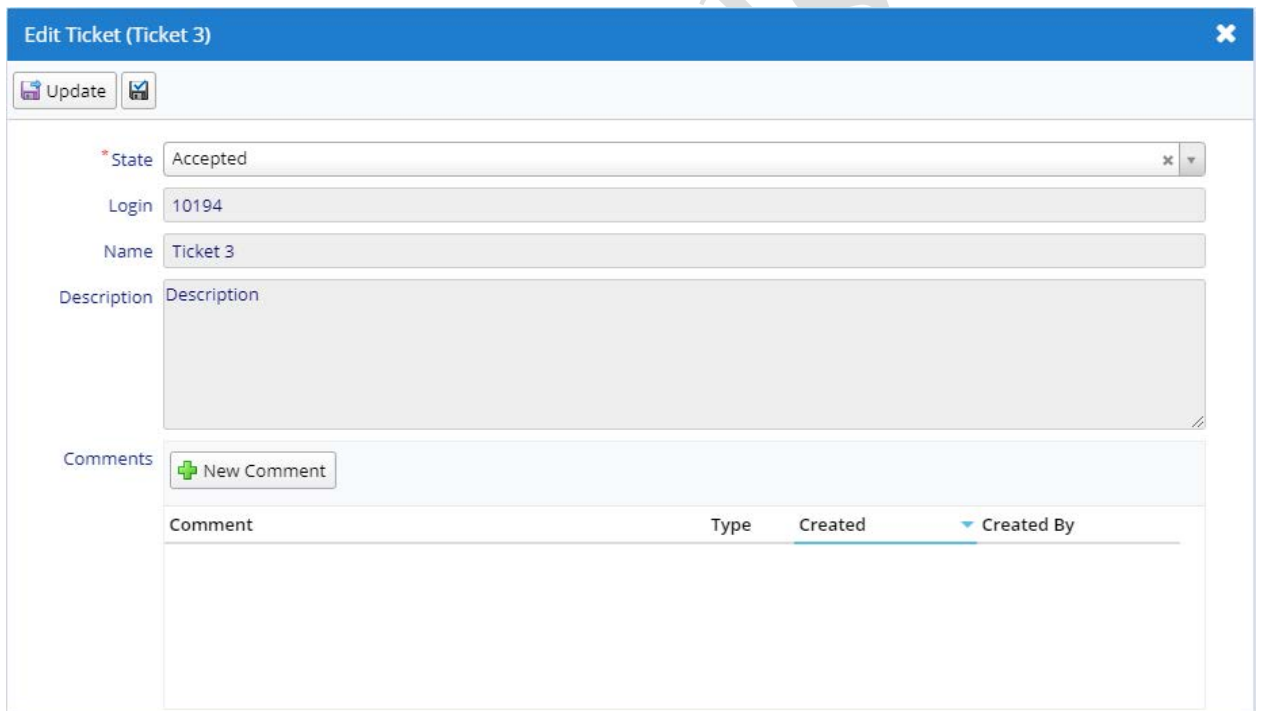


ID	Login	Name	Description	State	Created	Created By	Updated	Updated By
4	10194	Ticket 2	Do something else	Completed	03/05/2018 23:35:19	10194	03/06/2018 00:06:22	admin
5	10194	Ticket	Issue 888	Cancelled	03/05/2018 23:35:45	10194	03/05/2018 23:53:13	admin
7	10194	Ticket 4	Description	In Progress	03/05/2018 23:37:12	10194	03/05/2018 23:52:43	admin
8	10194	Ticket 5	Description	Accepted	03/05/2018 23:37:31	10194	03/05/2018 23:37:31	10194
6	10194	Ticket 3	Description	Accepted	03/05/2018 23:36:46	10194	03/05/2018 23:36:46	10194
3	10194	Ticket 1	Do something	Accepted	03/05/2018 23:34:32	10194	03/05/2018 23:34:48	10194
2	10185	Ticket2	vcsvdsv	Accepted	02/27/2018 06:47:51	10185	02/27/2018 06:48:30	manager
1	10185	Ticket1	Description	Completed	02/27/2018 02:52:35	10185	02/27/2018 02:53:41	manager

Fig. 30. List of tickets.

search by Login or Name... - search by client's login or ticket name.

10.2 Edit ticket



Edit Ticket (Ticket 3)

Update [icon]

*State: Accepted

Login: 10194

Name: Ticket 3

Description: Description

Comments: + New Comment

Comment	Type	Created	Created By

Fig. 31. Ticket edit form.

10.2.1 Fields

State – ticket state. Available values:

- **Accepted** – ticket is accepted by the system;
- **In Progress** – ticket is in progress;
- **Completed** – ticket is completed;
- **Cancelled** – ticket is cancelled.

Login – login of the client to whom the ticket belongs.


Name – ticket name.

Description – ticket description.

Comments – comments.

10.2.2 Actions

Update – save changes and close the form.

Apply changes  – save changes (form remains open).

New Comment – create new comment.



10.2.2.1 Comments

Comments + New Comment

Comment	Type	Created	Created By
Comment2	Private	01/22/2018 04:09	manager
Comment1	Public	01/22/2018 04:08	manager

Fig. 32. List of ticket comments.

New Comment
✕




 Save


* Comment

* Type ✕ ▾

Fig. 33. Comment create form.

Edit Comment
✕

 Update

 Delete

* Comment

* Type ✕ ▾

Created By

Fig. 34. Comment edit form.

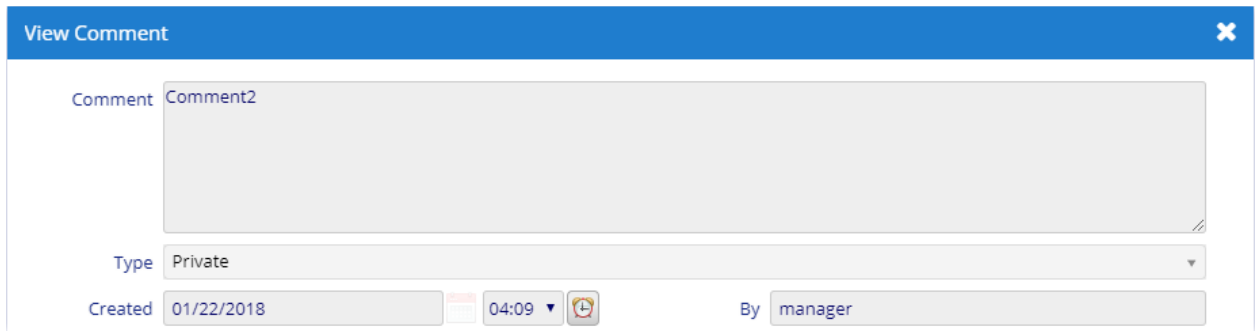


Fig. 35. Comment view form.

10.2.2.1.1 Fields

Comment – comment.


Type – comment type. Available values: **Private** – invisible for trader (via Trader Portal); **Public** – visible for all.

Created – comment creation date and time.

By – name of the user who added the comment.

10.2.2.1.2 Actions

Save / Update – save changes and close the form.

Apply changes  – save changes (form remains open).

10.3 Tickets processing

Client (trader) creates new ticket via Trader Portal. Created ticket has **Accepted** state and it is accessible for client's White Label manager. Manager takes this ticket to work changing the state to **Is Progress**. When ticket is completed, manager changes the state to **Completed**. If ticket cannot be completed, manager can set it to **Cancelled** state.

When changing the state of ticket system sends email notification to trader and manager.

At any state of ticket processing manager can add a comment to the ticket. There are two types of comments: **Private** – comment invisible to a trader; **Public** – comment is visible to all.