

Onboard to VertexFX Trader

with 6 simple steps!



Hello There!

We'll guide you through some simple steps, ensuring all the necessary details are in place. And you can easily onboard on VertexFX Trader with **6 simple steps in just 10 working days!**



You will Need:

- **Passport /ID copy.**
- **Company and Regulation Certificate.**
- **Shareholder Certificate.**



1. Start by choosing your Plan and adds on.

01

- **Fill in the form and upload the documents.**
- **Choose your method of payment and finalize it.**
- **Sign the Brokers Terms by coordinating with your account manager.**

Notes:

- All plans are under a quarterly based billing system charged in advance.
- All plans are upgradeable with no extra setup charges.



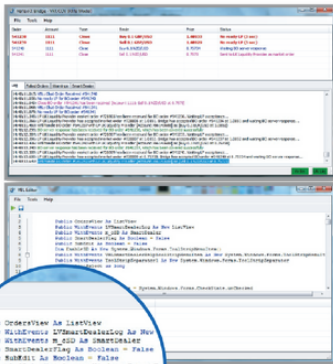
02

2. Fill in New System Requirements

03

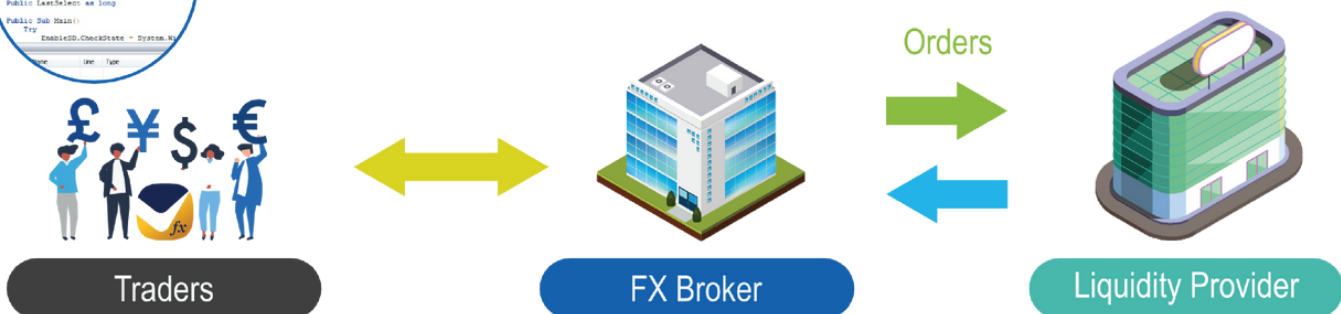


3. Setup FIX API and Risk Management Bridge



Why need FIX API:

- Price Feeding
- STP- Risk Management Process
- Integrate with the VertexFX license.



HOW TO INTEGRATE YOUR DATA FEED AND LP WITH THE VERTEXXFX LICENSE.

03

Follow The Steps Below

Integrating a new bridge with VertexFX for FIX API:

01

- **Documentation:** Provide the FIX API documentation and dictionary.
- **Demo Account:** Give access to a FIX demo account, including the FIX account ID (Tag1).
- **IP Whitelisting:** Whitelist IP address 185.96.71.6 on the LP firewall if needed.
- **Conformance Test:** Conduct a test to ensure the bridge works with VertexFX.
- **Live Deployment:** If the test is successful, deploy the bridge to your server for live trading using the live account settings.
- **Integration Time:** For a new bridge, the integration process will require 10 working days.

Integrating a ready Bridge with an already integrated LP:

02

- **FIX LIVE Account:** Provide access to a FIX LIVE account, including the FIX account ID (Tag1).
- **IP Whitelisting:** Ensure your server's IP address is whitelisted on the LP firewall (IP address details will be provided separately).
- **Symbol List:** Share the complete symbol list with specifications from your live account for mapping onto your VertexFX system.
- **Integration Time:** For an existing Bridge, the integration process will take up to 3 working days.

→ 4. Choose your Adds On



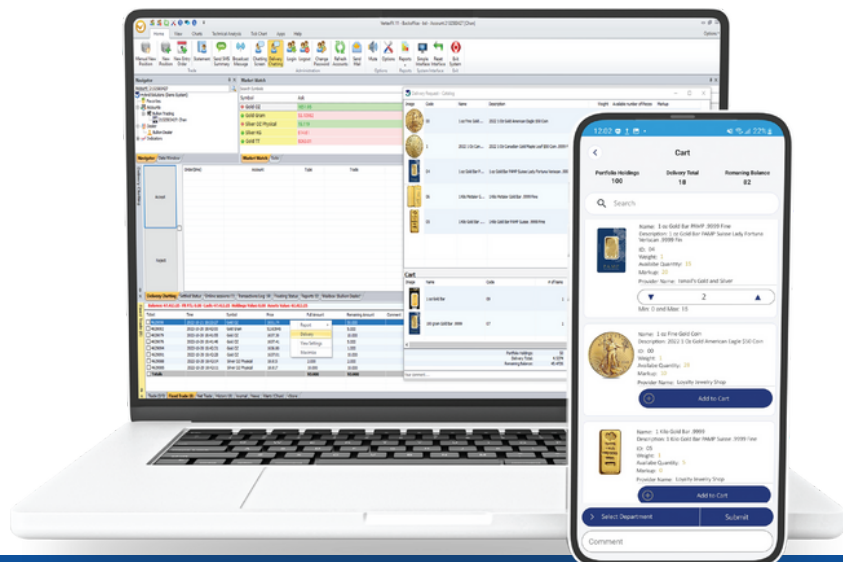
04

- Bullion Solution - Physical Trading Solution.
- CRM – Client Relation Management.
- Standalone Fully Branded Mobile Application.

Each add on has its own process that you will be fully guided through.

VertexFX Bullion Solution

Offers seamless trading experience. With two bullion trading modules - Buy Only and Buy Fixing. Traders can now buy and deliver specific items at the same price they were purchased, whether they choose immediate or future delivery.





How to Integrate CRM to VertexFx Trader?



CRM Integration Requirements

1. Create Subdomain pointing to your VertexFX Server IP Address.
2. Provide us with the following SSL files:
 - certificate.crt
 - ca_bundle.crt
 - Private.key

Learn more about our

[CRM Partners](#)



Why do Brokers need CRM?

A CRM system can help brokers to manage their client relationships, track leads and opportunities, and automate tasks. This can free up brokers' time so that they can focus on trading and providing excellent client service.



Enhanced client satisfaction and loyalty

A CRM system enables brokers to monitor client interactions and feedback, promptly addressing issues, ultimately boosting client satisfaction and loyalty.



Streamlined lead generation

CRM systems assist brokers in tracking leads and automating tasks like email marketing, leading to increase lead generation and improved conversion rates.



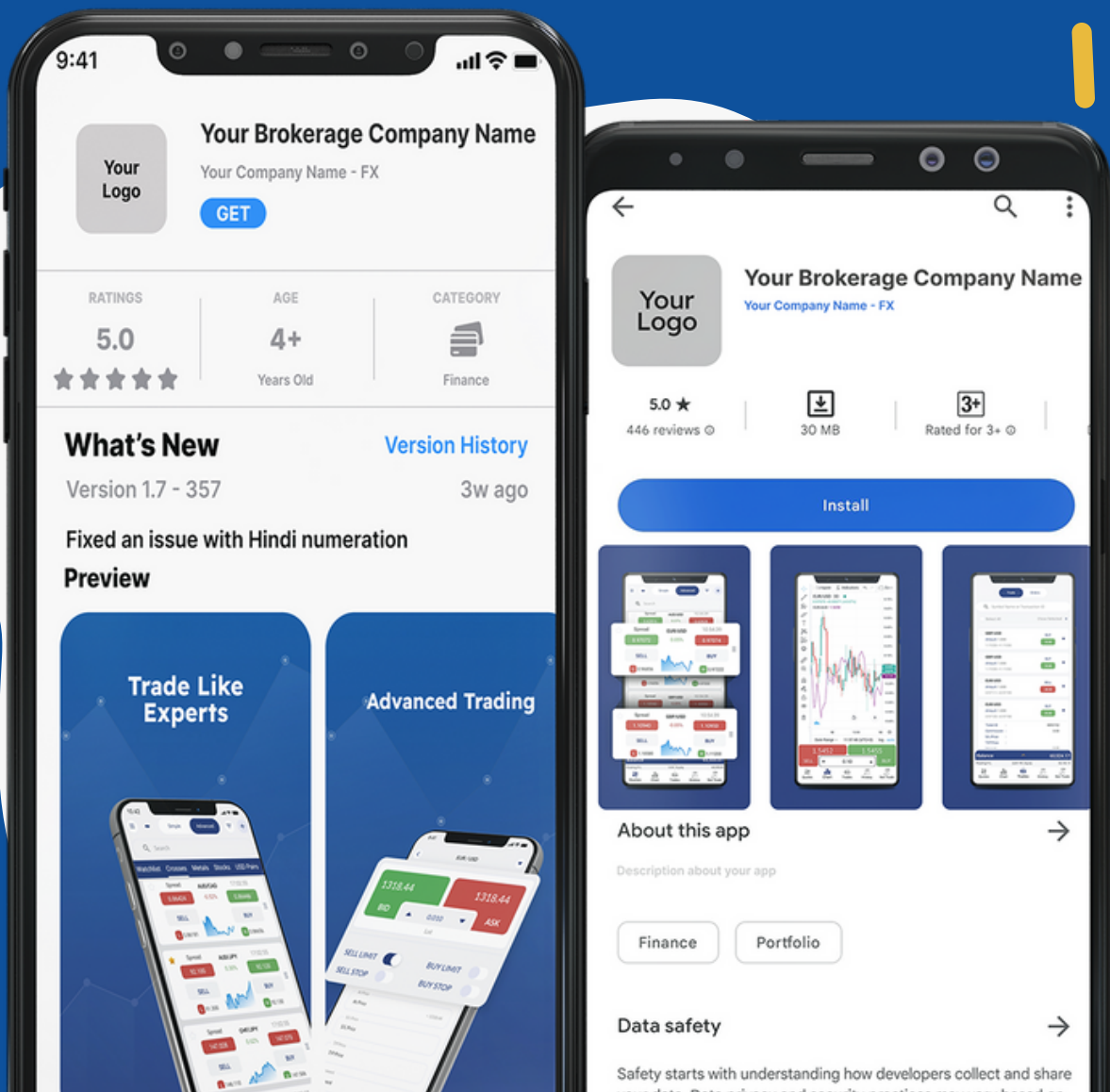
Task automation for efficiency

CRM systems automate various client relationship management tasks, including follow-up emails, payment tracking, and more freeing up brokers' time for other priorities.



Boost Your Brand Visibility

with VertexFX Standalone
Mobile App



What's New

Version History

Version 1.7 - 357

3w ago

5.0 ★

446 reviews

30 MB

3+

Rated for 3+ Ⓢ

Install

Trade Like
Experts

Advanced Trading

How to Get Your Own Fully Branded Mobile Trading Application?



Create Developer Accounts

Begin by creating your own Apple and/or Google developer accounts. Follow the provided guidelines and complete the necessary KYC requirements.

01



Submit Your Company Logo

Provide our packaging department with your company's logo in high resolution. Ensure it meets the specified dimensions of: **1024 x 500** and **512 x 512** pixels.

02



Delivery via Email

After completing the development process and ensuring quality, we will deliver your Android branded mobile trading app directly to your email.

For iOS kindly generate a [Team Key and Assign Role](#) to Development Department as 'App Manager'.

03



Upload to Stores

Finally, Setup and prepare your stores, you will have to upload the apps and stores contents to your Google Play and App Store accounts.

04

Please note: The app submission to Apple and Google stores typically takes up to 5 business days for completion. However, additional time may be required by these platforms for verification and approval.

Google Play Corporate (Business) Account FOR ANDROID



You will Need:



D-U-N-S Number:

1. A unique nine-digit number provided by Dun & Bradstreet.
2. Used globally to identify businesses.
3. Google uses the D-U-N-S number to verify your organization.
4. Verification involves providing an official business document to confirm the information obtained from Dun & Bradstreet.
5. You can find or request a D-U-N-S number through Dun & Bradstreet.

[Learn how to find or request a D-U-N-S number](#)

Note: Once you apply and receive a DUNS number you can use it for both your Apple or Google Developers account.



Contact Information for Google Play Users:

1. A contact phone number and email address for your organization that will be displayed on Google Play.
2. Users can use this information to reach out to your organization.
3. Verification involves receiving a code to confirm the accuracy of the provided contact details.

[Learn more about developer verifications](#)



Contact Information for Google:

1. Another set of contact phone number and email address specifically for Google's use.
2. These details are used by Google to contact your organization if necessary.
3. These contact details won't be displayed on Google Play.
4. Verification involves receiving a code to confirm the accuracy of the provided contact details.



Form of Payment:

1. A valid form of payment is required to pay the one-time registration fee of USD 25.
2. This fee is necessary for the registration of the developer account for your organization.



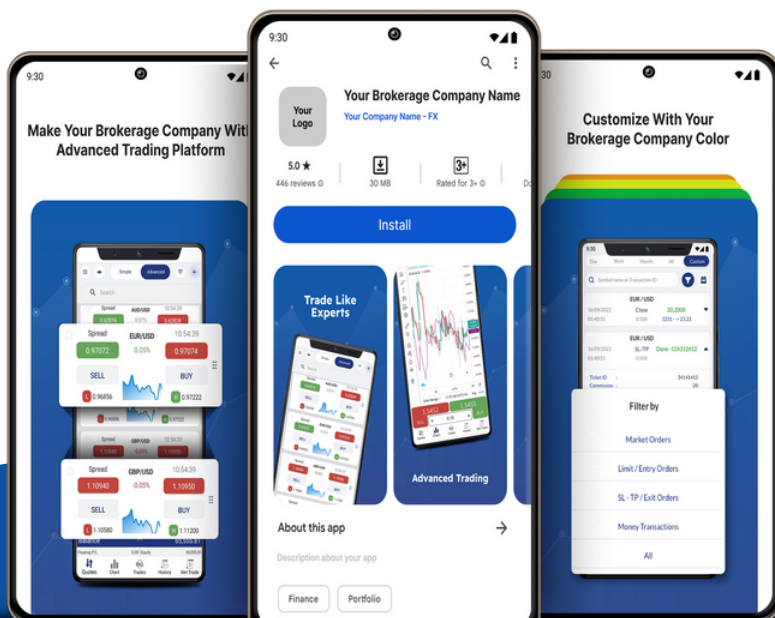
iOS Corporate (Business) Account

- Follow the verification process outlined by Apple, which may include confirming your identity and payment details.

➤ Registering for a NEW DUNS (For iOS):

1. Visit [DUNS Number Lookup Tools](#).
2. If your company is not listed, go to [DUNS Lookup](#) and provide the necessary details.
3. Submit the requested company details. Fill in the information and proceed to submission.
4. Pay any fees as per D&B policies.
5. Once approved, you will receive your DUNS number via email.
6. Allow up to 5 business days to receive your number from D&B.
7. After obtaining your D-U-N-S Number, allow up to 2 business days for Apple to receive your information from D&B.
8. To update your D&B profile, send an email to D&B. Keep in mind that it takes up to two business days for D&B to provide updated information to Apple.
9. After completing the D-U-N-S registration process, proceed with the enrollment process by following this link: [Enroll - Apple Developer](#).

Note: Once you apply and receive a DUNS number you can use it for both your Apple or Google Developers account.



→ 5. Packaging and Delivery

05

VertexFX provides a comprehensive, packaged solution, simplifying the installation and setup process. Once your VertexFX package is prepared, it will be promptly delivered to you.

Let's talk about Standard System Deliverables!

Your VertexFX license comes with the following:

- Download links for the BackOffice Terminal, Client Terminal, and Mobile App (branded or universal).
- The main dealer login credentials (Admin, Demo, and History).
- Agent Commission plug-in for cloud license.
- VertexFX Bridge integrated with a FIX API.



→ 6. Training

06

We are committed to ensuring your success from day one.



Our platform training program is designed to empower you with the knowledge and skills necessary to maximise the potential of your VertexFX Trading Platform.

Our user-friendly training modules are easy to follow, allowing you to efficiently set up, configure, and utilise the platform's robust features and functionalities.





Let's unleash Your Brokerage Full Potential With VertexFX!

We're delighted to have you onboard, and we
can't wait to see you thrive.

