KAVIX Broker Suite

Run your brokerage from one desk.

Manager, client terminal and CRM in one window: the Windows app, or the same desk in your browser. You open accounts and watch the book. Your clients trade on your own branded terminal. KAVIX runs the servers, the risk engine and the updates.

MT5-Manager-style console | Your brand on the terminal | AI trading assistant

Web · Android · Windows | Every change audited

1 · The big picture

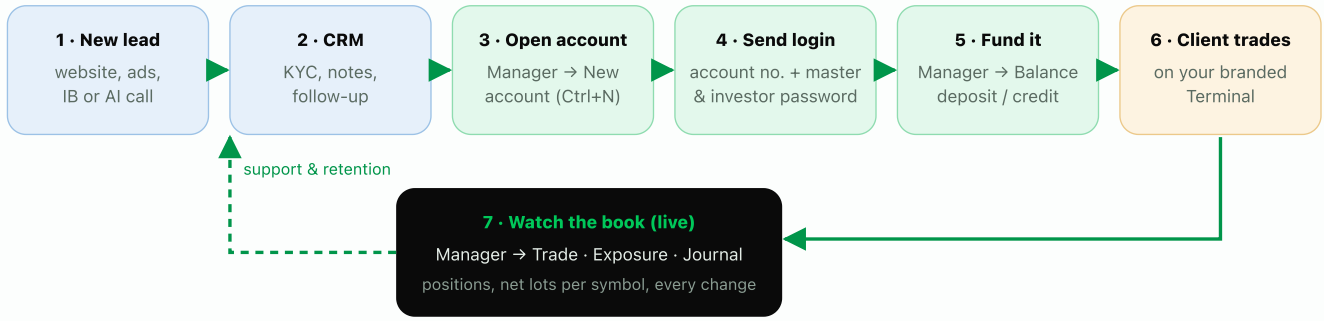
Three people, one system. The broker controls everything from the Broker Desk; the client only ever sees the broker's brand.



The client never sees KAVIX. They see your name, logo and colours.

2 · Day to day: from lead to trade

The full workflow, in the order it happens. Steps 3 to 5 take about one minute.



1. **New lead.** A lead arrives from your website, ads, an introducing broker or the KAVIX AI calling assistant.

2. **CRM.** Your team checks KYC and follows up in the Broker CRM (or your own Back office CRM).

3. **Open the account.** In **Manager**, press **New account**, type the client name, pick a group, press Open. The account number and passwords appear once.

4. **Send the login.** Give the client the account number and master password privately. The investor password is a read-only login (for a partner, an auditor or a parent).

5. **Fund it.** Right-click the account → **Deposit / withdrawal**. Every operation needs a reason and lands in the Journal.

6. **Client trades.** The client logs in to your terminal link and trades: market and pending orders, SL/TP, partial close, history and the AI assistant.

7. **Watch the book.** Positions, floating P/L, margin level and net exposure per symbol update live in Manager. Close a client position with a right-click when you need to.

3 · The Broker Desk: four tabs, four logins

Each tab keeps its own login, so one person can work with all four at once. Switch with Ctrl+1 to Ctrl+4 (Alt+1 to Alt+4 in the browser).

Tab	What it is for	Who signs in	Sign in with
1 · Manager `Ctrl+1`	MT5-Manager-style console: groups, client accounts, balances, live positions, exposure, journal	Broker owner, dealer, back office	Your KAVIX AI email and password (organisation is pre-set)
2 · Terminal `Ctrl+2`	Your branded trading terminal, exactly as clients see it	Client (or you, to test)	Account number + master password (investor password = read-only)
3 · Broker CRM `Ctrl+3`	Users, trades, team and roles, white-label partners, AI client calls	Broker admin team	Your Broker CRM login (each team member gets their own key and role)
4 · Back office `Ctrl+4`	Your existing CRM, if you have one (optional)	Your staff	That CRM's own login

No Windows PC? The same desk runs in any browser at **terminal.kavixai.com/manager/desk**: Manager and Terminal open inside the page; Broker CRM and Back office open in their own browser tab (marked ↗). Your desk settings (brand, links) stay in that browser.

KAVIX DOES

Servers, risk engine, updates

- Sets up your organisation, brand and starter groups
- Runs prices, the trading engine and stop-out 24/7
- Ships updates to web, Android and the desk
- Backups and monitoring

YOU (THE BROKER) DO

Clients and money

- Open accounts and send logins
- Deposits, withdrawals, credit, bonus
- Set trading terms per group
- Watch exposure; support clients

YOUR CLIENT DOES

Trades on your brand

- Logs in with account number + password
- Trades, sets SL/TP, reads history
- Asks the AI assistant by chat or voice
- Never sees KAVIX

4 · Full structure

Everything in the suite, as one tree.

```
KAVIX Broker Suite  (your brokerage)
├── Broker Desk  Windows app
│   ├── 1 Manager  MT5-Manager-style console
│   │   ├── Navigator: groups ▸ accounts, positions, exposure
│   │   ├── Accounts: balance, credit, equity, margin, P/L
│   │   ├── Actions: new account, deposit, credit, passwords
│   │   ├── Groups: leverage, stop-out, commission, swaps
│   │   └── Journal: who changed what and why (undo)
│   ├── 2 Terminal  what the client sees
│   ├── 3 Broker CRM  users · team · white-label · AI calls
│   └── 4 Back office  your own CRM (optional)
├── Client Terminal  your name and logo
│   ├── Web link + Android app (+ desktop)
│   ├── Charts, market & pending orders, SL/TP
│   ├── History, statements, payments
│   └── AI assistant: chat and voice
├── KAVIX server  run by KAVIX
│   ├── Manager API + trading & risk engine
│   ├── SL / TP / stop-out check every 10 s
│   ├── Live prices and charts
│   └── Licence, brand, backups, monitoring
└── Accounts
    ├── DEMO / CONTEST: KAVIX server (day one)
    └── REAL: your licensed MT5, linked in
```

About real-money accounts. Real client money always sits with a licensed broker. REAL accounts run on your own licensed MT5 server and connect to the KAVIX terminal; KAVIX never holds client funds.

Day one is ready. When your organisation is switched on, the starter groups (demo\standard, demo\islamic, contest\standard) are already there with the standard symbols. Sign in, press **New account**, and you are live.

5 · Start in 5 minutes

1. **Install.** Download the Broker Desk zip, unzip it, open **KAVIX Broker Desk.exe**. No Windows PC at hand? The whole desk opens in any browser at **terminal.kavixai.com/manager/desk** (Manager alone: **/manager**).

2. **Sign in to Manager** (tab 1) with your KAVIX AI email and password. Not sure how it looks? Press **Look around first** to see it with sample data.

3. **Open a test account** with **New account** and give it a deposit with **Balance**.

4. **Log in as the client** in tab 2 (Terminal) with that account number and master password. Place a trade.

5. **Watch it** appear in Manager → Trade and Exposure. That is the whole loop.

KAVIX SETS UP FOR YOU

Before your first login

- Your organisation, licence and starter groups (demo, Islamic, contest)
- Your brand on the terminal: logo, colours, name, server name, signed link
- Team keys and roles for Broker CRM
- Plan and billing; the AI voice add-on if you want it

YOU HAVE READY

What a broker brings

- Logo and colours; the names of your team and their roles (admin, dealer, viewer)
- Your own CRM link, if you have one (tab 4)
- For real money: your own MT5 server and licence, plus a payment gateway or bank. The KAVIX ledger runs demo and contest accounts.
- Legal pages and your KYC process