

How to Create Brokerage Account

NOTES:

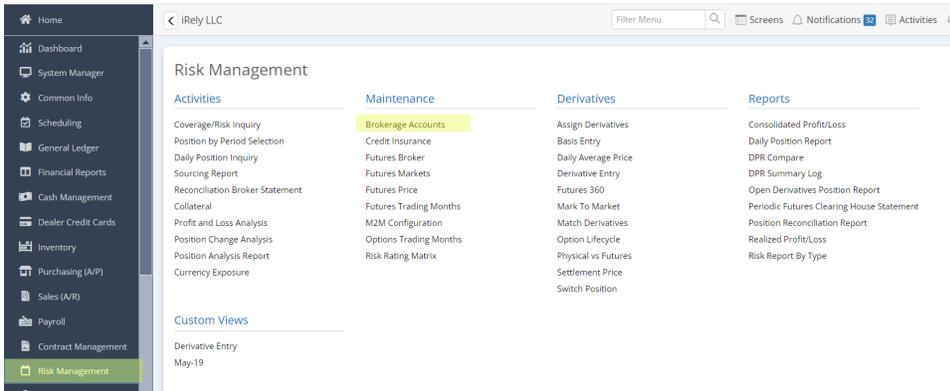
If you do not have an existing [Futures Broker](#), please create one by following this steps: [How To Create Futures Broker](#)

If you do not have an existing [Futures Market](#), please create one by following this steps: [How to create a new future market](#)

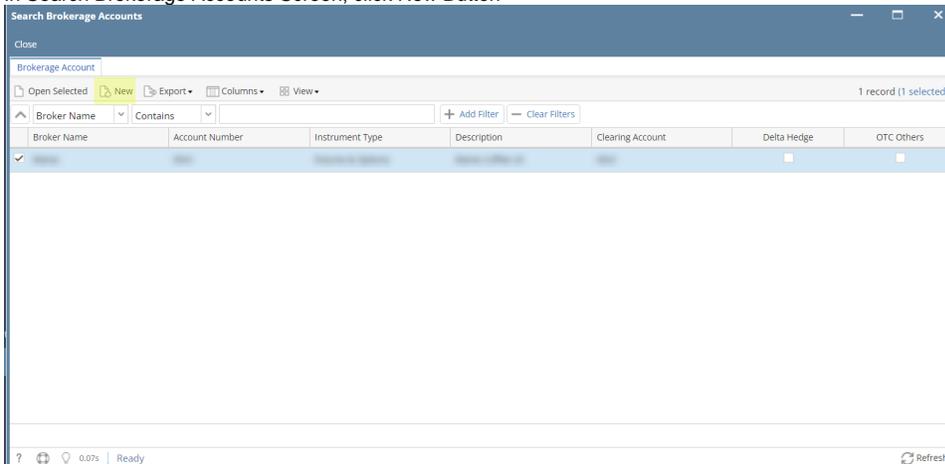
If you do not have an existing [Trader \(Sales Representative\)](#), please create one by following this steps: [How to Add a Sales Representative type Salesperson](#)

Please Follow to below steps to create a brokerage account.

1. Go to Risk Management > Maintenance Section > Brokerage Accounts



2. In Search Brokerage Accounts Screen, click New Button



3. In New Broker Account Screen, populate details:
 - Select Broker name from the broker dropdown
 - Enter the account number of the selected broker
 - Select instrument types
 - Select the Market name where the selected broker deals
 - In Trader/Salesperson Panel, select the Trader
 - In Commission Detail Panel:
 - + Enter the Market Name
 - + Populate the Effective Dates
 - + If the instrument type is Futures then the the futures rate Type (Round turn or Half Turn) , Futures commission and Future currency
 - + If the instrument type is option then the Options rate type (Round turn or Half Turn), Options commission and option currency.

Brokerage Account - 07182018

New Save Search Delete Undo Close

Details Audit Log Activities

Broker: Sample Broker

Account Number: 07182018

Instrument Types: Futures & Options

Clearing Account: 07182018

Description: This is a Sample Broker

Delta Hedge:

OTC Others:

Trader / Salesperson

Trader:

Sample Trader:

Commission Detail

Duplicate Remove Export View Filter (F3)

Date	End Date	Fut. Rate Type	Fut. Commission	Fut. Currency	Opt. Rate Type	Opt. Commission	Opt. Currency	(AA) Fees	Margins			
									Per Futures Contract	Min	Max	Percentage
22	01/03/2023	Half-Turn	10.00	USD	Half-Turn	0.00	USD	0.00				

0.18s Edited Page 1 of 1 Refresh

4. Click Save Button.