



Traders' Academy Online Courses



IBKR's Client Portal – Message Center & Ticketing System – Study Notes

This lesson will explain how to use Client Portal to access the Message Center and various methods of help available through the Ticketing System.

The Customer Message Center can be used efficiently to assist in resolving issues. There, clients may quickly search for a solution to many hurdles. And if users cannot find a speedy answer, they may choose a ticket template that matches the issue. Such tickets are then routed within the company to the appropriate support team.

Having logged in to Client Portal, expand the application menu by clicking on those three horizontal bars in the top left corner of the page, alongside the IBKR logo. You will see the Messages and Support links displayed. We'll start by clicking the Support link so that you can see alternative assistance methods also including a link to the Message Center. From this menu, users may search for contracts and ticker symbols, select and submit corrections to prior years' tax forms, view short stock availability and so on.

I'll click the link to the Message Center; whose simple default layout is like that of a basic email inbox. Click to expand either Inbox or Expired messages. The inbox is divided into three folders for Inquiries, Corporate Actions and Other Messages. Click each to locate folder content. To the upper right corner of the page, you will see the bell icon. Unread messages, FYIs and notifications will be displayed by a red circle as they arrive in your inbox.

Use the Configuration wheel next to the Compose button to select Message notification preferences. Along the top, users may set primary and secondary language preferences. Below users may choose how to receive responses to Ticket Inquiries, General Notices and a summary of those notifications if necessary. Note that you may select to receive right here in the Message Center or in Trader Workstation. Additionally, users may select to receive notifications by email. When you have set your preferences, select either the Close or Save buttons along the bottom.

The Compose button will expand when clicked to quickly enable users to jump in to Tax Correction Forms, submit a Trade Cancellation Request or to submit a Pattern Day Trader Request. However, I'll select the first choice to Compose a New Ticket. Here, users are required to summarize the issue. Here's a hint: This step is just like a Google search, so keep it brief. If you know you need to submit a ticket to a specific team, simply enter ANY text in the box and click on the Submit Question button.

You can see that the software wants further information. However, I can choose to Continue with Ticket in order to drill down in to a specific issue. I will click this button and now you will see the structure of how tickets can be efficiently routed to the appropriate area. Access the list of issues from this dropdown menu and select. Then you may drill down further into the related issues in the adjoining selection field by clicking on the dropdown arrow. You will learn that each issue has a directory of sub issues.

Let's stop here and review briefly the subdirectories associated with some of the major topics.

Choosing Account Services will direct you towards these topics. Funds and Banking will offer you these selections.

Product information is categorized this way. Professional Services are available according to these account types.

Let's take a look at Commissions, Fees and Interest. Expanding this subdirectory prompts links to these pages. Select one that might help resolve your issue. If these don't help resolve the problem, move ahead. Choose the appropriate account number if required.

The lower box enables users to note specifics about the issue. Enter the dialogue to help the support team answer your issue quickly. You may also add up to two files if necessary. Use the paper clip icon to activate the browse and upload function. Note that there are file size limitations here.

Finally, use the Submit button to route your ticket to the relevant support area. The display will revert to the Message Center inbox. You can see in the Inquiries inbox a copy of your specific inquiry with a reference number listed. The Status to the right displays Sent.

Let's return to the New Support Ticket area by selecting New Ticket from the Compose dropdown menu. Previously, I showed you how to bypass the search functionality if you wanted to quickly report an issue. However, you can find a tremendous amount of answers to common issues by entering summary details here. The search bar is powered by iBot – Interactive Brokers automated response system. AI search functionality has been developed to cut down response time in providing solutions to common issues. You can simply type questions such as, *'how do I withdraw funds'* or *'what are commissions for US stock orders'* and expect iBot to deliver links to help answer your questions.

The Message Center is a hub for IBKR's Ticketing System and is available through Client Portal. Remember, our client service representatives have probably heard the same question before. That's why we built out the system so that when questions arise, we can help direct you to where you might find a solution without picking up the phone. And if that doesn't help, the Ticket Center has been engineered to get your issue to the correct area as quickly as possible.