



Traders' Academy Online Courses



White Branding – Study Notes

We provide Advisors with the ability to White Brand specific areas of our software and documentation. That means that you can display your own logos and your company information on Interactive brokers trading platforms and reporting systems.

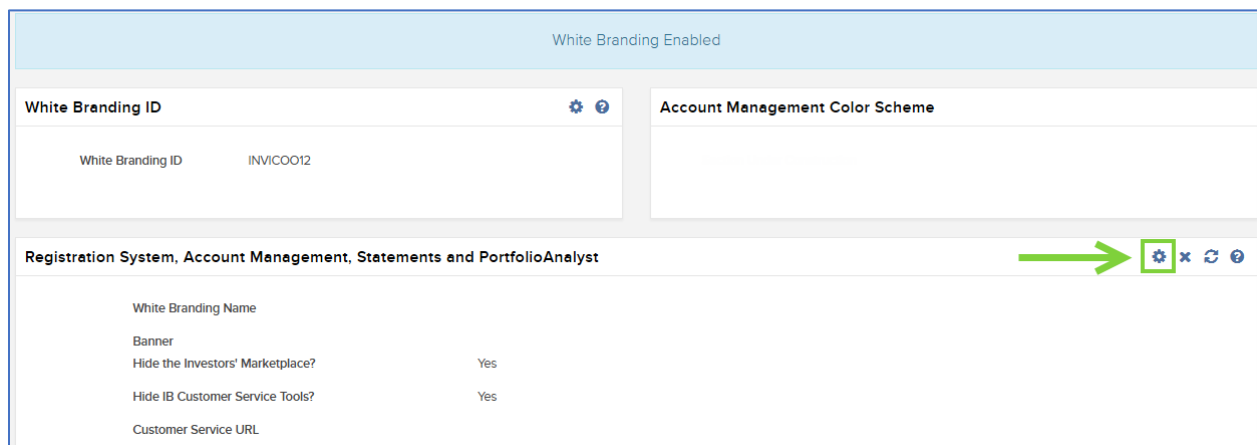
- Advisors may White Brand:
 - Trader Workstation
 - Account Management - Client Portal
 - Statements
 - Emails
 - PortfolioAnalyst
 - IBKR's Registration System
 - Contract Database
 - TWS Users' Guide

You can set up White Branding inside Advisor Portal under the Account Settings area. Under the Configuration column to the right, locate the White Branding section. Click the configuration icon to the right to begin.

The screenshot shows the 'Account Settings' interface. On the left, there are sections for 'Profile(s)' and 'Financial Information'. On the right, the 'Configuration' section is expanded, showing various settings. The 'White Branding: INVICO012' setting is highlighted with a green box, and a green arrow points to the gear icon next to it.

Profile(s)	Configuration																
<table border="1"><tr><td>Mr. Test Test</td><td>Account Holder, Treasurer</td></tr><tr><td>James Dolan</td><td>Non Employee</td></tr></table>	Mr. Test Test	Account Holder, Treasurer	James Dolan	Non Employee	<table border="1"><tr><td>Customer Type: Professional Advisor</td></tr><tr><td>Legal Residence: Connecticut, United States</td></tr><tr><td>Account Alias: AJW1969</td></tr><tr><td>Base Currency: USD</td></tr><tr><td>Commissions Pricing Structure</td></tr><tr><td>Paper Trading Account</td></tr><tr><td>White Branding: INVICO012</td></tr><tr><td>Audit Trail</td></tr><tr><td>IB FYI</td></tr><tr><td>Investor Category</td></tr><tr><td>Create, Move, Link or Partition an Account</td></tr><tr><td>Close Account</td></tr></table>	Customer Type: Professional Advisor	Legal Residence: Connecticut, United States	Account Alias: AJW1969	Base Currency: USD	Commissions Pricing Structure	Paper Trading Account	White Branding: INVICO012	Audit Trail	IB FYI	Investor Category	Create, Move, Link or Partition an Account	Close Account
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- The White Branding ID section enables Advisors to enter an ID, which is a unique identifier that you can see within your communications.
- It can be changed at any time in this section by clicking the configuration icon.
- The ID can be composed of numbers and letters, with the underscore character and must range from six-10 characters in length.
- Note that if you wish to send white branded SMS communications, the ID must **not** exceed seven characters.
- Remember that if you change the ID, you should also update all your White Branding URLs with the latest ID.
- Each panel has the customary help icon to the upper right. Click the help icon to display information about the White Branding capabilities specific to each panel. Let's take a look at each section



Account Management Color Scheme

This will enable you to select a color scheme that clients will see when logging in to Client Portal.

Let's look at the White Branding choices for reporting by clicking the Configuration icon.

- To make universal changes across all iterations for the name "Interactive Brokers LLC" on client account management and registration pages, enter a White Branding name.
- **Banner** – In the banner section Advisors can upload banners. Note that the banners have size and image file restrictions. Click the button to Choose a File and upload your image file.

White Branding Name

The white branding name is a substitute for "Interactive Brokers LLC" on client account management and registration pages.

White Branding Name

Banner

Brokers and Professional Advisors can upload their own banners to Interactive Brokers to white brand the IBKR Registration System, Account Management, Activity Statements and PortfolioAnalyst. The banner is a 650x80 jpg or png image. The Images must be less than 50KB in size.

Once you have uploaded your banners and completed the form below, your white branded link will be: <https://www.clientam.com/sso/Login?partnerID=INVIC0012>.

Do not use the Interactive Brokers logo in your white branding banner. IBKR cannot endorse any Advisor/Broker in any banner.

Banner

650x80 JPG or PNG

- When this configuration process is complete, your white branded link will look like this and will include your White Branding ID.

<https://www.clientam.com/sso/Login?partnerID=XXXX9999>

Some other choices are:

- *Investors' Marketplace* – Advisors may choose Yes or No to display the Investors' Marketplace to clients by clicking the appropriate button.
- *Customer Service* – you may substitute IBKR's customer support links at the top of the Account Management - Client Portal menu with a link to your own customer service page by entering the page URL. Here's an example of the constructed URL:
- <https://www.yourcompanyname.com/customerservice.html>
- Advisors may also choose to hide or display IBKR's customer service tools from display, again, by clicking the appropriate button.
- When you are finished loading images and pasting URLs click the blue Save button to the lower right of the screen.

Emails – emails are sent to customers from the registration System, Account Management- Client Portal and by Customer Service. Click on the Configuration icon and use the fields displayed to customize the letters or emails. Click on the Save button.

Contract Database – Users may White Brand the Contract Database on the IBKR website by entering information in the fields on this page. Towards the bottom, users may add links to display images for the Contract Database and provide links to Customized Stylesheets. Note that this page also provides a sample link to the White Branded version of the Contract Database, which should generally be available 12 hours after the user effects changes. Click Save when done.

Trader Workstation Users' Guide – Users may change the logo displayed throughout the TWS Users' Guide with a logo of their own by configuring this section. Click the Configuration icon and note the instructions for creating and uploading your logo. Upload the logo and make any of the optional changes in the fields below. Create the link to the Users' Guide on your own website using the URL displayed that includes your White Branding ID.

Trader Workstation – Advisors providing IBKR's Trader Workstation to their clients can represent their own identity by configuring the final panel. Users will need to complete and submit the form displayed. Note that you may also add your own helpdesk links, as well as additional useful links if required. Changes submitted may take up to 48 hours to take effect. Click on the Save button to complete and continue.

You will find useful information about White Branding in the [Advisors Getting Started Guide](#) using the Additional Info link at the end of this lesson.

And you may email your White Branding issues to whitebranding@interactivebrokers.com