3. How to Configure Client Area

The **Client Area** module lets you tailor how customers interact with your system—controlling everything from account settings and security policies to verification workflows and supported languages. This guide walks you step-by-step through every subsection of **Configurations**, with deep dives on each field, optional API hooks, and best-practice tips.

Basic configuration of the **Client Area** module is done through the **Configurations** section.

It includes the following subsections:

1. General
2. Documents
3. Verification Levels
4. Languages

General Section

To start configuring, go to **Configurations > General** tab across the top. You will see two blocks: **Clients** and **Security**.

In the **Clients** block, you can configure:

1. **Number of accounts:** Enter the maximum number of accounts a single customer can have.
2. **Activate account right after creation:** Enable this to allow clients to activate their accounts immediately after creation.
3. **Demo account:** Enable this to provide clients with a demo account (e.g., with virtual assets).
4. **Personal manager:** Enable this to assign a personal manager to the client.
5. **Exchange with Two-Factor Authentication (TFA):** Require additional identity verification before any exchange.
6. **Withdrawal with TFA:** Require additional identity verification before any withdrawal.

> All these settings can also be managed via API, as many of them are specifically designed for integration and external use. You have full control over the configuration—use it as needed for your specific purposes.

In the **Security** block, you can configure:

1. **Session time minutes:** Define how many minutes of inactivity will trigger automatic logout. If left blank, the default is 60 minutes.
2. **Refresh session time minutes:** Define how often the session should be refreshed when the user is active. Normally twice the **Session time minutes** value.

Adjust timeouts to balance usability (longer sessions) against security (shorter sessions).

Click **Save** when finished.

Documents Section

Configure verification documents required from your customers during login, verification, or other business purposes (e.g., some documents may be needed for identity verification, while others for approvals or compliance).

In the **Verification Documents** block, select the checkboxes next to the required documents:

1. Passport or ID
2. Bank card (front)
3. Bank card (back)
4. Source of funds

> **Use Case Examples:**
>
> - KYC Level 1: just Passport or ID
> - KYC Level 2: add Bank card, Source of funds

Verification Levels Section

This section manages verification and includes the following blocks:

1. Account Configurations
2. Verification Levels (e.g., email, phone, biometrics)
3. Statuses

Account Configurations block:
Open account right after sign up: Check this if you want to open accounts automatically for new customers.
Required level to create account: Select a level from the drop-down list. Values are pulled from the **Verification Levels** section.
Required status to create account: Select a status from the drop-down list. Values are pulled from the **Statuses** section.
Click **Save** to apply changes.

To add a new verification level:

1. Click the **Add button** in the upper right corner of the **Verification Levels** block.
2. Select the **Type**: Personal or Business.
3. (Optional) Add custom fields in **Properties.**
4. Enter a unique **Label** for the level.
5. Then you can fill in custom fields, as well as **Title** and **Description** in different languages:
   In the **Language** field, select the target language.
   Provide custom fields in that language. Enter **Title** and **Description**.
6. To add the same level in a different language:
   In the **Language** field, select the target language.
   To copy fields from the original language, choose the language from the drop-down list and click **Clone**.
   Enter new values or use automatic translation with AI by choosing the languages **From** and **To** and clicking **Translate.**
7. Click **Save** to add the new verification level.
   To edit verification levels, click the **Edit** icon, but note that **Type** and **Label** cannot be changed.
   In the **Status** block, there is one default status, **Init**.

To add a new status:

1. Click the **Add button** in the upper right corner of the **Verification levels** block.
2. Enter **Label**, **Text**, and any necessary **Properties**.
3. Click **Save** to add the new status.

To edit a status:

1. Click the **Edit** icon in the corresponding row.
2. You can change **Text**, but not **Label** of the status.

To delete a status: Click the **Delete** icon in the corresponding row.

> **Note**: You cannot delete the default status.

Languages Section

The **Languages** section is designed to manage the languages that are used in your product.

It includes two blocks:

1. **Available Languages:** All languages available.
2. **Active Languages:** Languages that are used.

To add a language from the list of available languages to the list of active languages:

1. In the **Available Languages** block, select the checkbox next to the language you want to add.
2. To make it easier to find the language you need, use the **Search** field. Start typing the name of the language, for example, German or Japanese.
3. Click **Save** to apply the changes.

> **Note**: The language will appear in the list of active languages, but will not yet be available for selection in your product. Before adding, it is recommended to translate items into that language. Refer to the [How to Manage Translations] and [How to Manage Texts] for more information.

When you have all the necessary texts and elements translated:

1. Go back to **Languages**.
2. In the **Active Languages** list, check the box next to the language for which you have added translations.
3. Click **Save**.

The **Configurations** section in **Client Area** empowers you to enforce policies, customize verification flows, and provide a truly localized experience—all on a per-project basis or globally via API. Regularly review these settings to adapt to evolving compliance requirements, new markets, or product enhancements. Once you've dialed in your ideal configuration, your customers will enjoy a seamless, secure, and fully branded journey through your CRM.

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