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RENSOURCE CAPITAL

## **RC Stockbroker User Manual - Version 7.0**

**July 2009**

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## 1.1 Installation from the Web

To install using the Internet, take the following steps:

- Enter the download address in your internet browser
- A File Download window appears, Select **Save**
- The Save As window will appear, specify a location for the file to be saved, in most cases you should save to your root drive, which is drive C:

Installation:

- Follow the installation prompt, using **all** the **Default** selections
- Reboot your computer once you have finished the installation

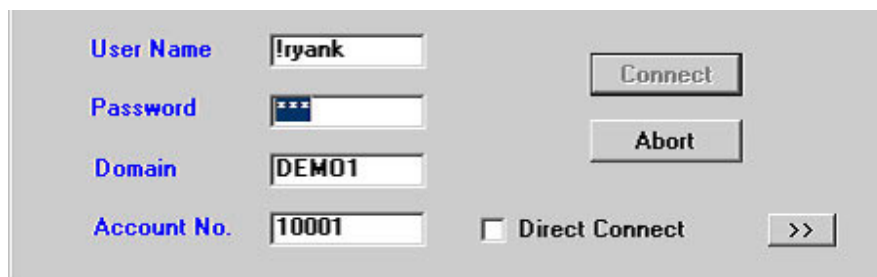
Once the download is complete, a RC Stockbroker icon will now be located on your desktop.

## 1.2 Logging On

This can be done in one of two ways:

- 1) Double click on the RC Stockbroker icon on your desktop
- 2) Click on the Start button
  - Choose **Programs**
  - Choose **RC Stockbroker**

When the login screen appears you will be prompted for a User Name, Password, Domain, and an Account Number.



The login screen is a dialog box with a light gray background. It contains four text input fields on the left, each with a label in blue text: 'User Name' (containing 'lryank'), 'Password' (containing '\*\*\*'), 'Domain' (containing 'DEMO1'), and 'Account No.' (containing '10001'). To the right of these fields are two buttons: 'Connect' and 'Abort'. Below the 'Account No.' field is a checkbox labeled 'Direct Connect' which is currently unchecked, and a '>>' button.

Select **Connect** and the application will log you on to the network.



## 2.1 RC Stockbroker Display and Menu Bars

### Application Caption Bar

The Application Caption Bar is located at the very top left hand side of the screen. The version of RC Stockbroker running is shown as well as the name of the layout.

### The Menu Bar

**Figure 2-1:** The Menu Bar when the Chart Window is Active

The Menu Bar is found directly below the Application Caption Bar. The contents of the Menu Bar can be selected to configure the objects in a layout. (See figure 2-1)

The options on the Menu Bar **change** depending on which window, within your layout, is currently active. The active window is a highlighted window that is selected in your layout. Once you have decided on a layout, experiment by clicking on different windows (making them active). Notice the different options which become available in the Menu Bar as you select different windows.

### The Icon Bar



**Figure 2-2:** An example of The Icon Bar when a Chart window is Active

The Icon Bar is found directly below the Menu Bar. The Icon Bar, shown in figure 2-2, provides instant access (shortcuts) to frequently used options found within the contents of the Menu Bar. Placing your mouse pointer over each of the icons will identify that icons' usage. Similar to the Menu Bar, The Icon Bar changes depending on which window within the layout is active.

## The Windows Blue Tab Keys



**Figure 2-3:** The Windows Blue Tab Keys.

The Windows Blue Tab Keys are located directly below the Icon Bar. Clicking one of the Blue Tab Keys will open a new window, minimize/maximize an existing window, or make an existing window active.

Examples:

- If no Chart Windows are open, clicking the Charts Tab will open a new Chart Window.
- If a Chart Window is open and active, then clicking Charts will minimize the active chart window.
- If a Level II Window is active, clicking Charts Tab will activate a Chart Window and clicking Charts a second time will minimize the Chart Window.

To remove the Windows Blue Tab Keys from the RC Stockbroker platform:

- In the upper left corner Click **File**.
- Then Select **Exit**.
- A **Save Layout box** appears. Check the box next to the **Remove Blue Buttons option** and select save layout.

When you restart RC Stockbroker, the Windows Blue Tab Keys will not appear.

## 2.2 The Icon Bar

The Icon Bar allows quick access to configuration tools. The configuration tools will change depending on which window is active.

There are 3 different Icon Bars that appear depending on which window is active. Following is a brief description of the various Icon Bars that appear and a brief explanation of the configuration tools available.

### 2.2.1 Icon Bar Type 1

This Icon Bar appears when the **News**, **Alerts** or **Level II** window is made active.



**Figure 2-5:** Icon Bar Type 1

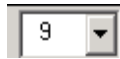
**Setup Colors:** Setup/change the default colors for the window



**Font Selection:** Change the font in the window



**Font Size:** Change the size of the font in the window



### 2.2.2 Icon Bar Type 2

This Icon Bar appears when the **Detailed Quote** window is active.



**Figure 2-6:** Icon Bar Type 2



**Insert Row:** Inserts a row at the current position in the table



**Delete Row:** Deletes the current/selected row in the table



**Append Row:** Adds a row to the end of the table



**Setup Colors:** Setup/Change the default colors for the window



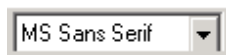
**Replace the Current Page:** Replace the current page with one of your choice



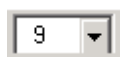
**Sort Field:** Select a field to sort the table



**Sort Order:** Change the sorting order of the table



**Font Selection:** Change the font in the window



**Font Size:** Change the size of the font in the window

### 2.2.3 Icon Bar Type 3

This Icon Bar appears when the **Charts Window** is active.



**Figure 2-7:** Icon Bar Type 3



**Replace Current Chart:** Enter new symbol for chart to display



**Next Chart:** Move to the next symbol in the chart symbol list selected. (The chart symbol list is derived from creating a Detailed Quote Window list. On the Menu Bar - select Data, Chart Symbol Series, and then the name of a list created in the Detailed Quote window.)



**Previous Chart:** Move to the previous symbol in the symbol list



**Select Indicator:** Add, delete, or customize current indicators, e.g. moving average, MACD.



**% Change or Linear Scaling:** Change the values on the Y-axis of a chart from linear to % change



**Line Chart:** Converts the visual representation of the chart to a Line chart



**Bar Chart:** Converts the visual representation of the chart to a Bar chart



**Candlestick Chart:** Converts the visual representation of the chart to a Candlestick chart



**Display Shorter Period:** Compress the chart to display fewer bars in the window.



**Display Longer Period:** Expand the chart to display more bars in the window.



**Zoom In:** Zoom in on the chart



**Pointer Mode:** Shows price, time, and date information at the point on chart where clicked.



**Crosshair Mode:** Click the crosshair icon, left click the mouse button on the chart, and hold the left mouse button down while moving the crosshair over the chart. Notice, the price/date/time values for the day will change within the status box as you move the crosshair around the chart.

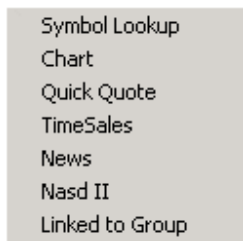


**Setup Colors:** Allows you to setup/change the default colors for the chart. The following can be changed:

- Colors of the various chart properties.
- Font Selection
- Pen style
- Pen width

### 2.3 Right Mouse Click Support

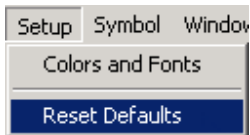
Additional configuration parameters can be found by right clicking on an active window.



**Figure 2-8:** An example of a menu activated by a right mouse click.

### 2.4 Reset Defaults

You can revert to the Default Settings by doing the following:



**Figure 2-9:** Reset Default option

Reset Defaults is available for some of the windows. It will reset the column sizes, colors, fonts and remove data.

## 2.5 Save as Default

You can save the current settings in a window as Default Settings by doing the following:

- Right click on an active window
- Select **Save as Default**

This will save the current settings for the window and apply these newly saved Default Settings to this window if closed and reopened.

**Note:** All windows will have different names for Save as Default. Examples: Save as Level II Default (See fig: 2-10), Save as Detail Quote Default, Save as Chart Default, etc...



Figure 2-10

Save as Default is available for some of the windows. It will save the column sizes, colors, fonts and some data.

## 2.6 Colors and Fonts – Step by Step

For an example on how to setup colors and fonts, select New Window, Condensed Quote Window, and Create New.

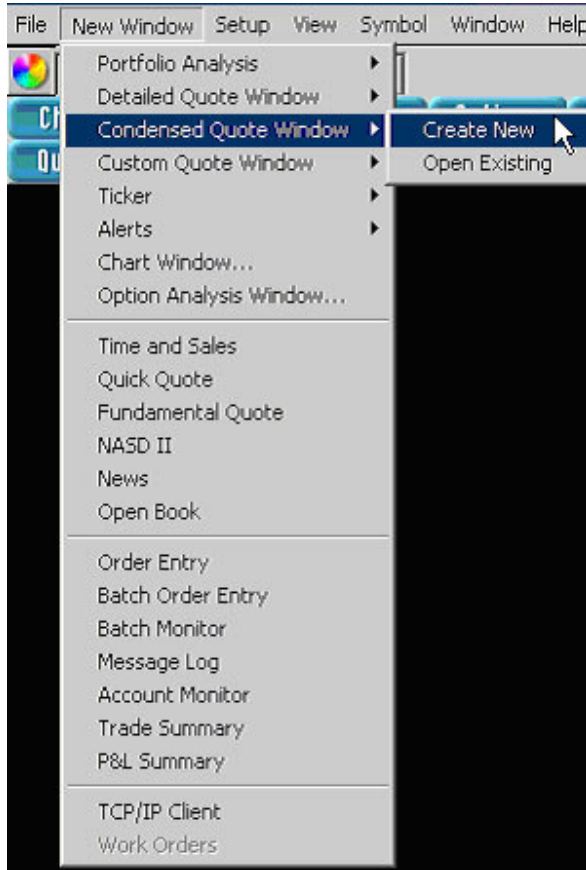


Figure 2-11

Right click on the Condensed Quote Window and select Fonts and Colors.

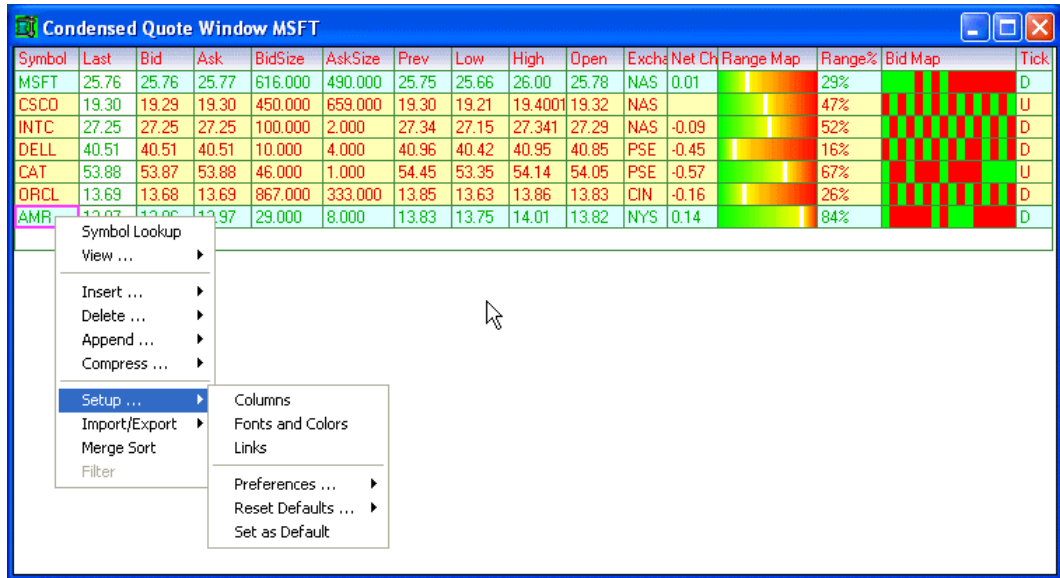
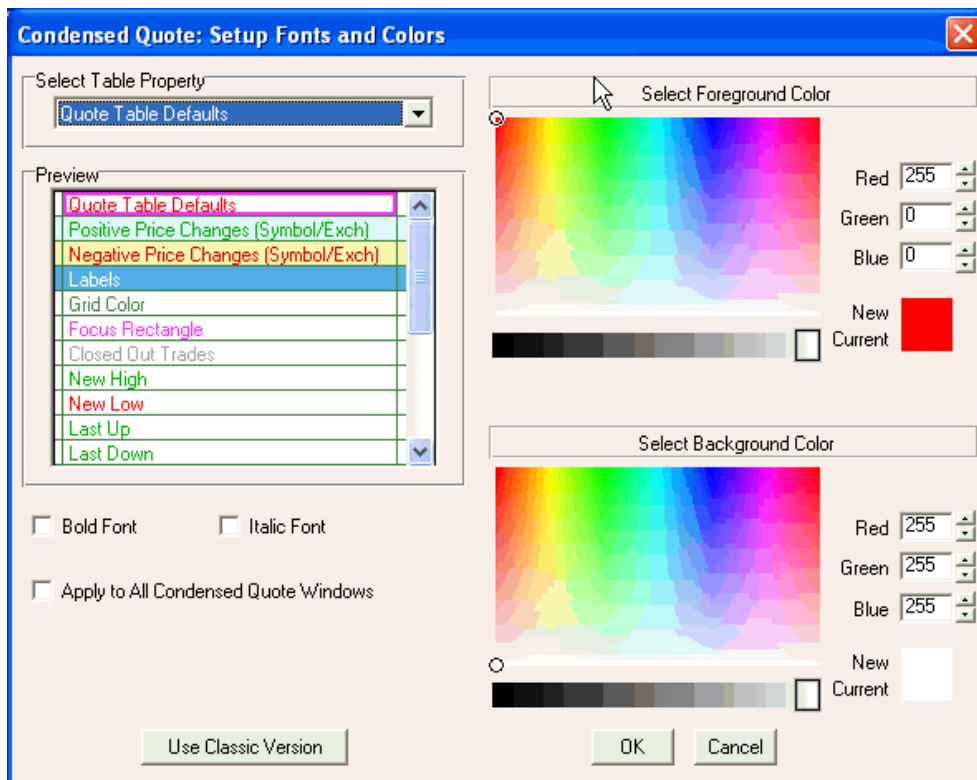


Figure 2-11a: Condensed Quote Window

There are 2 properties that can be configured, the foreground and the background. Either can be changed in its respective configuration window. Within each of these boxes are RGB sliders which are used to change the color. Notice the numbers at the side of each slider. The results of the color changes made for the selected property can be seen in the **Example** window (Bottom Left)



**Figure 2-12:** Setup Quote Table Defaults

## 2.7 Turning Columns On & Off

Detailed quotes have 30 columns that can be turned on or off for display.

To turn a column on or off:

- Click **View**
- Click the **column/ field name** e.g. Bid Size, to turn it on or off.

A check mark next to the column/ field name indicates that the column is turned on.

**Note: Even though 30 fields are available, most fields are only supported in the real time version.** The most common fields are Full Name, Last, Change, Open, High, Low, Previous, and Current Volume.

## 2.8 Sizing Columns

There will be times when the text does not fit into the columns. You can adjust the size of the columns to make them bigger or smaller according to your needs.

- Hold the mouse over the vertical grid line that separates the columns. Notice that the cursor will **change**.
- Click and hold the left mouse button and move it left to right to adjust the size of the column.

## 2.9 Movable Columns

The columns in many windows can be moved and rearranged

- Left mouse click the column to move
- Drag the column to a different location and release the left mouse button



### 3.1 Opening an Existing Layout

- Click on **File** on the Menu Bar
- Click on **Open Existing Layout** (see fig 3-1). A preloaded selection of Existing Layout pages will appear.
- Highlight one of these.
- Click **Ok**.
- The existing layout will then automatically open and be displayed.

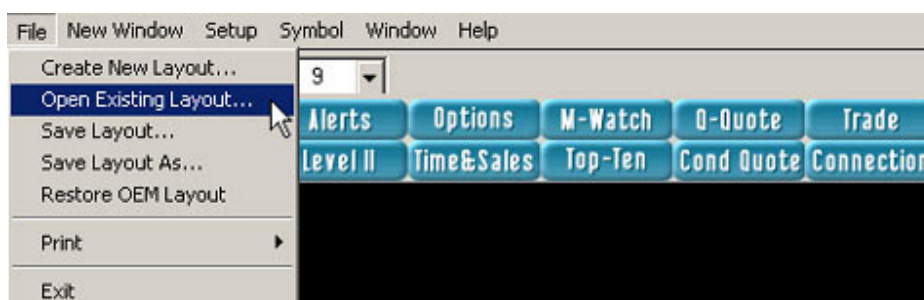


Figure 3-1: Opening an Existing Layout.

### 3.2 Creating a New Layout

- Click on **File** on Menu Bar
- Click on **Create New Layout** (see fig. 3-2). A window asking you to name your new layout will open.
- **Name** your Layout
- Click **Ok**.

You have effectively given yourself a clean slate with no preset settings or windows. This enables you to create a personalized custom layout suited specifically to your own needs. You are then free to choose which windows to open and more importantly which windows not to open.

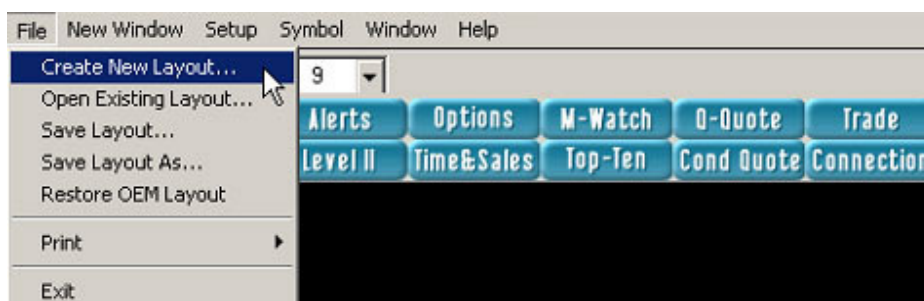
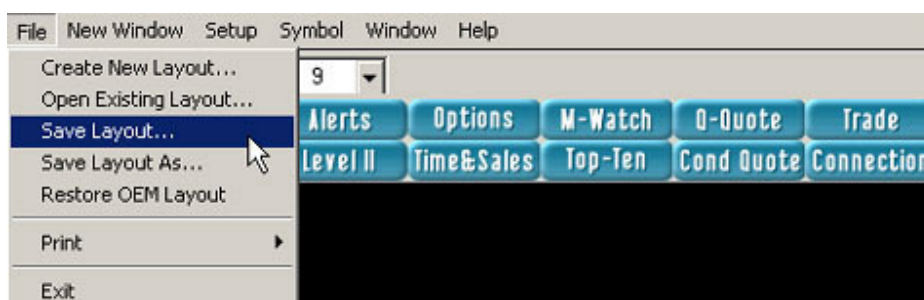


Figure 3-2: Creating a New Layout.

### 3.3 Saving a Layout

After you have created a layout to your satisfaction you will need to save it:

- Click on **File** on Menu Bar
- Click on **Save Layout As** (see fig. 3-3). A “Save Layout As” window will open asking you to name your new layout.
- **Name** your newly created layout.
- Click **Ok**.



**Figure 3-3:** Saving your Layout.

It is also important to remember that whenever a change is made to an existing layout, you must save those changes:

- Click on **File** on Menu Bar
- Click on **Save Layout**.

Whenever you exit the program you will be asked if you would like to save the existing layout before closing. If your response is “yes” then all changes made during your trading day will be saved and the next time you open the program the changes you saved will appear. If your response is “no”, then the next time you open the program, the layout will appear as it did on the beginning of the current day before you made any changes. This simple feature is to ensure that you will never accidentally close the program without saving your work.

### 3.4 Import / Export Layout

This feature is used for saving a specified layout and exporting / importing. It is most commonly used to save a specific layout as a default layout and allows for other users to import it into their trading software. The file containing the layout can be sent via email, floppy, etc...

In order to Export a layout:

- Close the Trading Software
- Click on the “**My Computer**” icon on your desktop
- Click on the **C Drive**
- Click on **Program Files**
- Click on the **IQ\_\_\_\_\_** Folder
- Click on a file named “**savelay**”, a window will pop up and flash a little
- When the “**savelay**” window finishes, scroll to the bottom of the IQQuote32 folder and there will be a file named “**LAY.ARQ**”
- Right click on the **LAY.ARQ** file and click “**Send to Desktop**”
- This is the file in which a Layout is saved.

In order to Import the LAY.ARQ file:

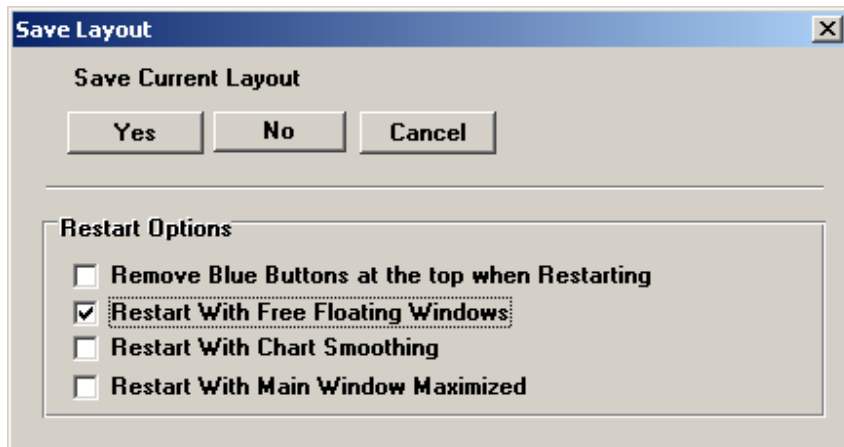
- Make sure the Trading Software is closed
- Refer to above and open the **IQuote32** folder
- Copy and Paste the **LAY.ARQ** file into the **IQuote32** folder
- Find the file named "**loadlay**" and double click, the file will load the saved layout
- Open the Trading Software, select **File** and Open **Layout**

### 3.5 Free Floating Windows

Free Floating Windows are yet an additional feature available on the Trading Platform. The **Free Floating Windows** feature allows the User to move Child Windows out of the Parent Window giving them the ability to create very flexible layouts across many screens.

To enable your trading platform for Free Floating Windows:

- Select **File** at the top of the **Parent Window**.
- Then select **Exit** and a **Save Layout** Interface will come up (see fig. 3-4).
- Check the box next to "**Restart With Free Floating Windows**"
- Then select "**Yes**".
- **Restart** your Trading Platform and you will see that the Child Windows are still in the Parent Window. To move them out of the Parent Window simply minimize the Parent Window and you will see that the Child Window is operating freely outside of the Parent Window.
- Arrange your Trading Platform as you normally would and Save your Layout to maintain the configuration.



**Figure 3-4:** The Save Layout box

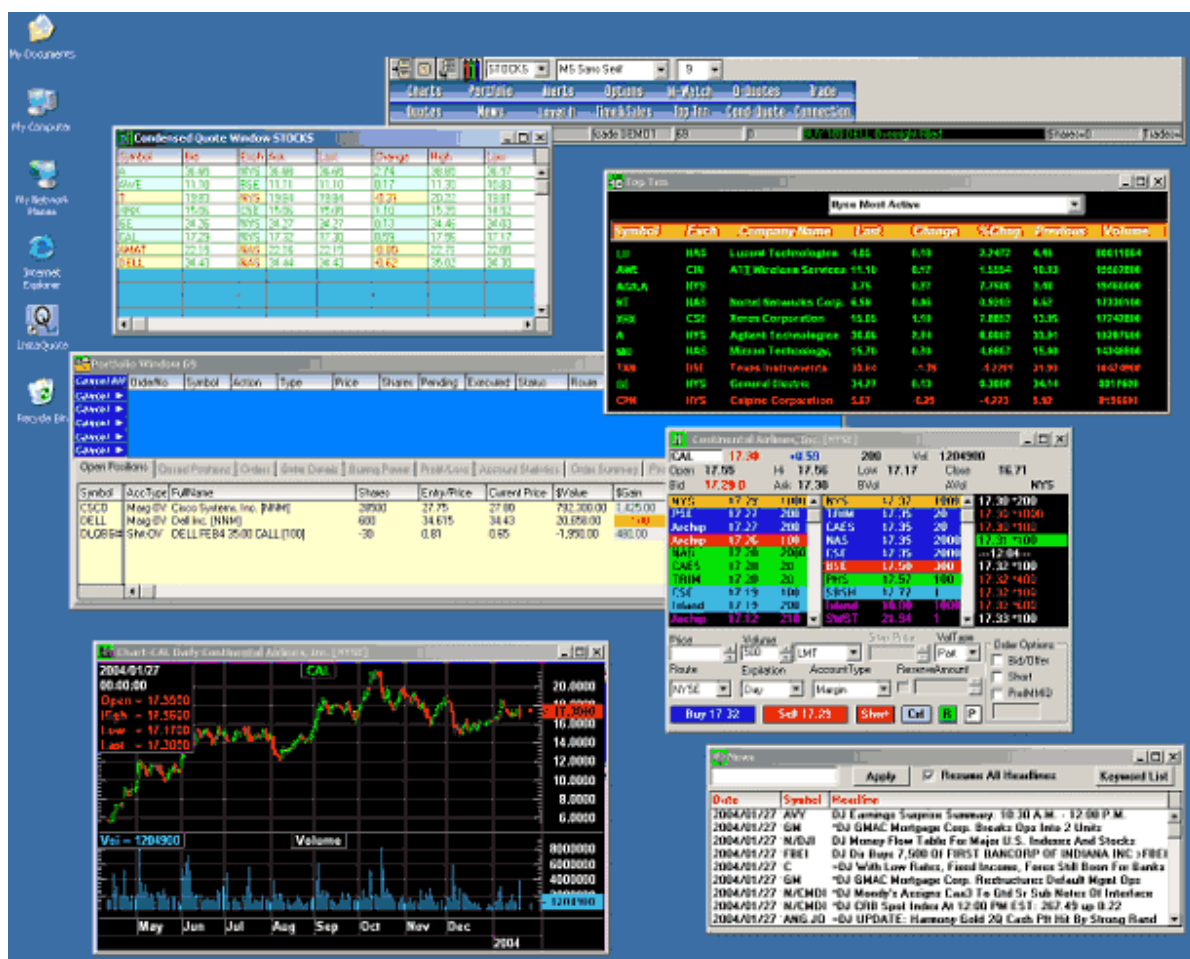


Figure 3-5: An example of Free Floating windows on the desktop.

## 4.0 Quote Windows



### 4.1 Selecting Quote Windows

There are five different Quote Windows for you to choose from. This can be done in two ways:

- 1) Clicking on the **New Window** button on the **Menu Bar**.
- 2) Using the **Blue Hot Keys**

The following types of Quote windows may be accessed simultaneously:

- Detailed
- Condensed
- Fundamental
- Custom (Market Watch and Top Ten)

An explanation of each of these Quote Windows will follow.

### 4.2 Detailed Quote Window

The Detailed Quote Window allows you to view the status of your personally selected symbols in a grid form (See fig 4-1).

Symbol	Full Name	Last	LSize	X Chang	Change	Open	High	Low	Previous	Current Vol	Time
MSFT	Microsoft Corporation [NNM]	26.246	24672	NAS	0.266	26.12	26.34	25.81	25.98	90597688	2003/12/08 16:42:59
DELL	Dell, Inc. [NNM]	34.766	6264	NAS	0.266	34.43	34.82	34.14	34.50	11496399	2003/12/08 16:42:56
INTC	Intel Corporation [NNM]	31.65	1000	NAS	-0.45	31.93	32.29	31.33	32.10	66684800	2003/12/08 16:43:56
GE	General Electric Company [NYSE]	29.37	900	NYSE	0.27	29.15	29.41	29.15	29.10	14601300	2003/12/08 16:01:37
IBM	Int'l Business Machines C [NYSE]	91.20	8000	NYSE	0.56	90.52	91.47	90.52	90.64	5266200	2003/12/08 16:02:22
SPY	SPDRS®-Based on the Standard & [AMEX]	107.57	100	AMEX	0.72	106.74	107.64	106.68	106.85	32421700	2003/12/08 16:15:36
QQQ	Nasdaq-100 Index Tracking Stock [AMEX]	35.235	4400	AMEX	0.195	35.01	35.33	34.78	35.04	86578888	2003/12/08 16:15:43
MO	Altria Group, Inc. [NYSE]	52.44	2800	NYSE	1.02	51.42	53.02	51.29	51.42	10016100	2003/12/08 16:00:46
CSCO	Cisco Systems, Inc. [NNM]	24.36	2000	NAS	0.61	23.70	24.37	23.69	23.75	39670676	2003/12/08 16:43:54
ORCL	Oracle Corporation [NNM]	12.836	14448	NAS	0.096	12.69	12.93	12.64	12.74	32253214	2003/12/08 16:42:54
LU	Lucent Technologies Inc. [NYSE]	3.02	400	NYSE	-0.03	3.04	3.07	2.998	3.05	24211400	2003/12/08 16:01:52
NOK	Nokia Corporation [ADR] [NYSE]	17.90	100	NYSE	-0.17	17.91	17.98	17.76	18.07	12957600	2003/12/08 16:02:32
TXN	Texas Instruments Incorpo [NYSE]	28.24	300	NYSE	-0.12	28.70	28.87	27.97	28.36	16579000	2003/12/08 16:01:36

Figure 4-1: An example of a Detailed Quote Window.

To open a Detailed Quote Window, do the following:

- Click on the **Quotes** button in the **Blue Hot Keys** menu.

For additional Detailed Quote Windows:

- Click on **New Window** on the Menu Bar.
- Click on **Detailed Quote Window**.
- Click on **Create New**.
- Enter a name, e.g. Dquote2
- Click **Ok**

Detailed Quote Windows can be customized to display up to 30 different columns of information on a particular symbol by making the quote window active and clicking on **View** in the Menu Bar or by right-clicking within the Detailed Quote window and selecting **Column Setup**.

Available Columns:

Full Name	News	Tick	Last
LSize	Exchange	Bid	Ask
Change	Open	High	Low
Previous	52 Week Hi/Low	VWAP	Bid Size
Ask Size	Current Volume	Open Int.	Bid Ask Spread
Total OI	Contract Size	Shares Out	% Price Change
Time	Last Reg Trade	Bid x Ask	HiLo Range
Chart Right	Chart Bottom		

Note: VWAP is calculated by adding up the dollars traded for every transaction (price multiplied by shares traded) and then dividing by the total shares traded for the day.

The Detailed Quote window is fully customizable and can be linked to the **Level II Window** and **Charting**.

#### Options within the Detailed Quote window

<b>Double Clicking</b>	Double clicking on a symbol from the Detailed Quote Window will open up a Level II Order Entry Box.
<b>Symbol Counter</b>	Keeps a current count of the number of symbols in the detailed quote window. The counter updates when a symbol is added or removed. It is located on the title bar at the top of the Window.
<b>Comma for Volume</b>	This Option provides a comma to be displayed in the volume field for easier reading. It can be turned on/off by going to Setup on the Main Menu Bar when the Detailed Quote Window is Active and selecting <b>Volume w/ Comma</b> . When there is a check mark, commas should be displayed.
<b>Column List</b>	The columns can be added, removed, or moved. To add/remove, go to the <b>View</b> tab in the Main Menu Bar when the Detailed Quote Window is active. By checking or unchecking the available columns, will add/remove the columns in the Window.
<b>Sort</b>	By double clicking on a column header, it will then sort the data in the table by that column. It will first sort ascending, then by double clicking again, it will then sort descending.
<b>Running Sort</b>	The condensed quote window can be sorted statically or in real time by enabling the Running Sort option. This can be done by clicking on Setup in the Main Menu bar, then checking Running Sort.

**Last Regular Trade** The Last regular Trade column is a combination of the LAST and CLOSE columns. The column will show the last trade for the selected symbol during market hours and then will only show the last regular trade for the day during pre and post market hours, acting as a close column. The difference is that Last Regular Trade will start showing regular trades again when the market opens, the Close column will not. The Close column will stay at the previous day's closing price.

To create: Activate the Detailed quote Window and select **VIEW** from the Main Menu Bar. Select **Last Reg Trade**.

**Order Imbalance** It is a situation in which buy orders for a particular security greatly outnumber sell orders, or vice-versa. These order imbalances can be viewed in the Detailed Quote window by changing the color in the "Color and Font Setup". See below on how to change the colors in the setup window for Order Imbalances.

**Express Bid and Offer** The Exchange will time bids and offers of 15,000 shares and larger. When such a quote (bid or offer) has been in existence for 15 seconds, the Exchange will issue an administrative message that an XPress Quote condition exists. When this does, the Detailed Quote window will display the XPress quote Bid and Offer. To change the color of the quote so it is recognizable as an XPress Condition quote, go to "Color Setup" in the Detailed Quote window.

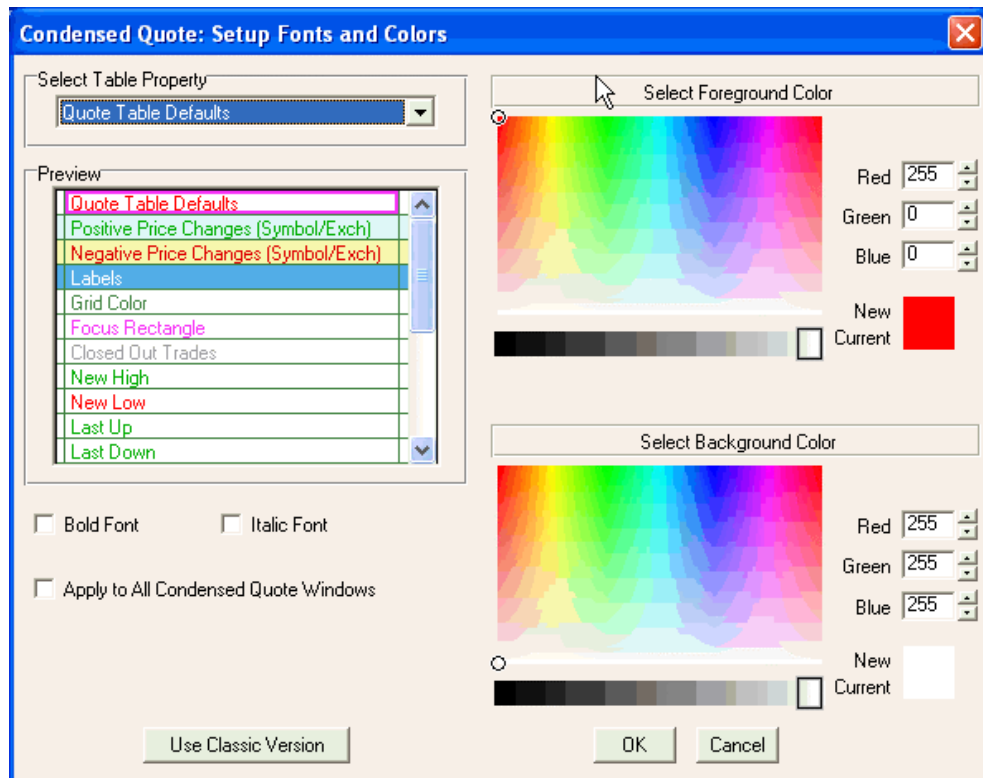
**Color and Font Setup** Many different fields and display features within the Detailed Quote window can be changed by using the Color and Font Setup window. There are three ways to open the Color and Font Setup window when the Detailed Quote window is activated: right click on the window and select "Color Setup", another way is to click on "Setup" at the top of the application and select "Colors and Fonts", and the last way is to click on the Setup Color "Crayons" short cut key at the top of the application.

**Note:** A user can also change the font and size of the characters by the drop down menus on the tool bar, which is listed in the picture below.



**Tool Bar for trading application when the Detailed Quote window is activated**

**Importing Symbols** You can import symbols from Portfolio pages into the Detailed Quote window from accounts you have logged directly into previously. To do this, make the Detailed Quote window active, select symbol from the menu bar, click on "Import Symbols from Portfolio page," then select the Portfolio Window you want to import from.



**Color and Font Setup window**

**Apply to All Detailed Quote Windows**

When making a color change to the Detailed Quote window, if checked, it will change the colors for all other Detailed Quote windows. This change will affect all Detailed Quote windows, whether they are opened or closed.

**4.3 Condensed Quote Window**

The **Condensed Quote Window** (shown in fig. 4-2) allows you to view the status of your personally selected symbols.

To open a **Condensed Quote Window**, do the following:

- Click on the **Cond Quote** button in the **Blue Hot Keys** menu.

Additional **Condensed Quote Windows** can be opened by:

- Click on **New Window** in the Menu Bar
- Click on **Condensed Quote Window**.
- Click on **Create New**.

Symbol	Last	Bid	Net Change	Range Map	Range%	Bid Map	Tick	Ask
FSH	62.64	62.62	1.44		82%		D	62.64
GOOG	293.35	293.35	-4.38		3%		D	293.40
UNA	29.97	29.95	2.87		94%		D	29.99
MOT	21.57	21.57	-0.43		25%		D	21.58
TWX	18.12	18.11	0.57		76%		U	18.12
C	43.59	43.59	-0.33		20%		D	43.60
GE	33.85	33.85	-0.16		38%		D	33.86
NTAP	24.43	24.43	-1.07		32%		D	24.44
HOMS	3.50	3.50	0.94		62%		D	3.52
PFE	26.28	26.28	-0.32		18%		D	26.29
DELL	39.72	39.71	-0.11		5%		D	39.72
AMAT	17.83	17.82	-0.12		20%		D	17.83
CSCO	19.4018	19.40	-0.0282		48%		D	19.41
SIRI	6.76	6.76	-0.05		0%		D	6.77
QQQQ	39.50	39.50	-0.173		20%		D	39.51
JDSU	1.482	1.48	-0.018		9%		D	1.49

**Figure 4-2:** An example of the **Condensed Quote Window**

The Condensed Quote Windows can be customized to display up to 16 different columns of information on a particular symbol using the following three methods:

1. Make the quote window active and clicking on **Setup** in the Menu Bar and choosing **Column** from the menu.
2. Right-clicking on the menu header within the Condensed Quote window.
3. Right-clicking on the main body of the Condensed Quote Window and choosing **Setup** and then **Column** from the menu choices.

You may append, delete and insert rows or panes within **Condensed Quote Windows** by **right clicking** and choosing from the available options.

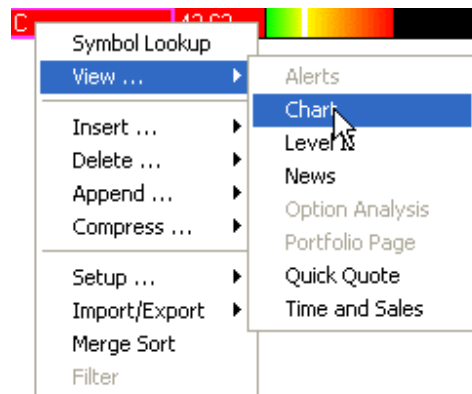
### Condensed Quote Window Labels

An unlimited number of labels can be created inside the Condensed Quote Windows (e.g. Telecom Stocks, Favorites, etc.). These labels can assist you to keep track of different groups of stocks within one quote window.

Symbol	Last	Range Map	Bid Map	Tick	Symbol	Last	Range Map	Bid Map	Tick
SEARCH STOCKS					TECH STOCKS				
GOOG	293.50			U	SIRI	6.763			D
YHOO	33.65			D	DELL	39.7212			D
LISTED FAVORITES					AMAT	17.8399			D
C	43.59			D	JDSU	1.488			D
IBM	83.364			D	EFTS				
MOT	21.60			U	DIA	105.63			D

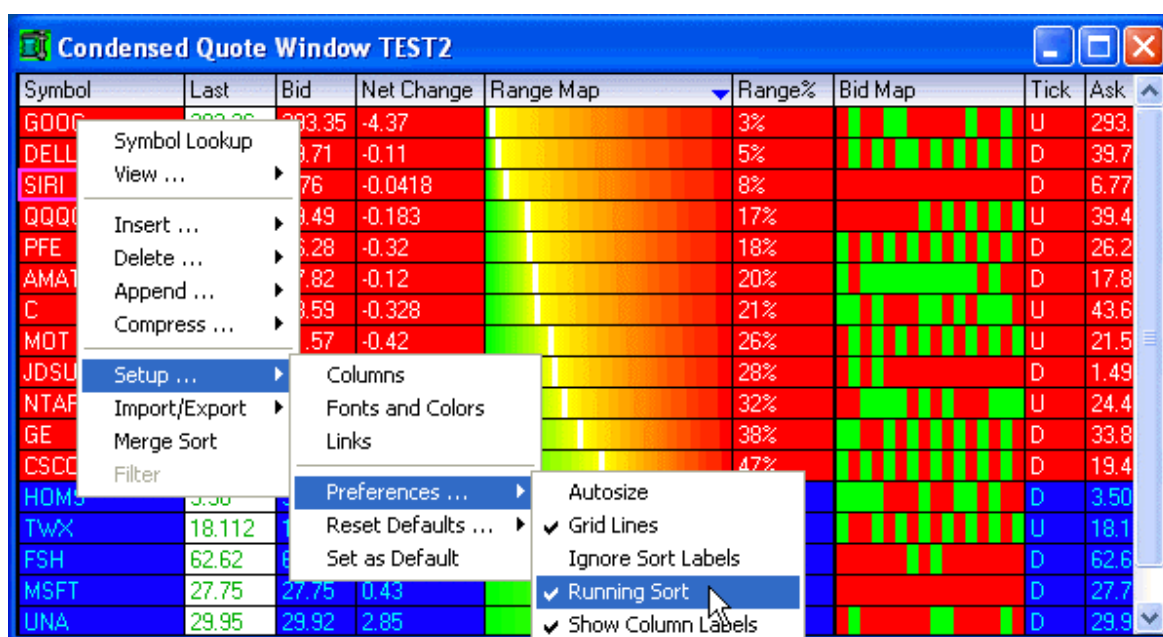
To create a label inside the Condensed Quote Window click on the Symbol Box, type in the desired header and press enter. Any text added in the symbol box that is not a valid stock, option or futures symbol will automatically be added as a label.

To bring up a Level II window, Chart, Time and Sales or other feature for any symbol – right mouse click on the desired symbol, choose **View** from the menu options and choose pick the feature of your choice.



## Running Sort

Any column within the Condensed Quote Window can be enabled with a live Running Sort by choosing Running Sort from the **Setup / Preferences** menu. Once you click on Running Sort, double click on the column header you want to have automatically sorted. A blue arrow will appear in the column enabled with the running sort.



**Options within the Condensed Quote window include:**

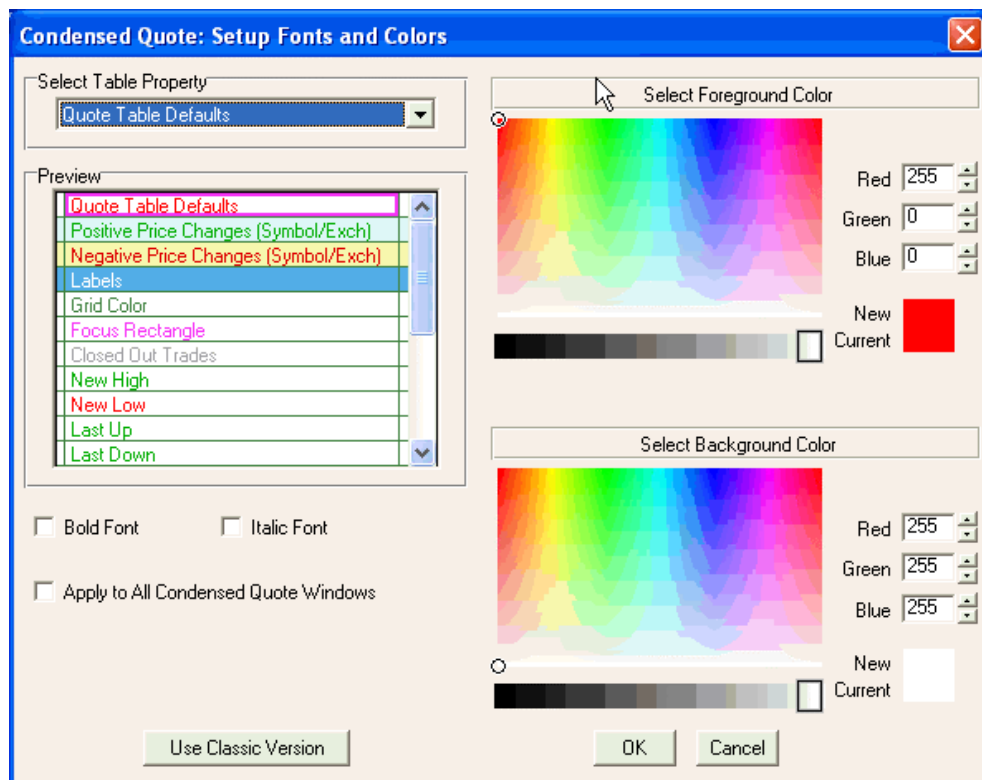
- Symbol Lookup**     Selecting this right click option causes a symbol lookup window to appear. Simply type in the name of the symbol you want to see or use the lookup feature.
  
- View**                 When you select View, a tree appears. You can select alerts, chart, level II, news, option analysis, portfolio page, quick quote, and time & sales. Selecting one of these options results in the appropriate window being opened.
  
- Insert, Delete, Append**     This allows you to insert, delete, or append rows and/or panes in the condensed quote window.
  
- Compress**                 This feature will allow you to remove labels or empty cells from the current pane or all panes.
  
- Setup**                     This feature allows you to setup columns, fonts and colors, and window linking. You can also setup window preferences and window defaults.
  
- Import/Export**             This features allows you to import symbols from a portfolio or detailed quote window. The copy and paste features work in conjunction with excel. Use Control + C to copy and Control + V to paste.
  
- Merge Sort**                This feature will merge empty columns and cells together and sort by the column header that was active when you selected merge sort.



**Tool Bar for trading application when the Condensed Quote window is activated**

**Color and Font Setup**

There are many different fields and display features within the Condensed Quote window that can be changed by using the Color and Font Setup window. There are three ways to open the Color and Font Setup window when the Condensed Quote window is activated: right click on the window and select “Setup”, then choose “Colors and Fonts”. Another way is to click on “Setup” at the top of the application and select “Colors and Fonts”, and the last way is to click on the Setup Color “Crayons” short cut key at the top of the application.



**Color and Font Setup window**

Apply to All Condensed Quote Windows

When making a color change to the Condensed Quote window, if checked, it will change the colors for all other Condensed Quote windows. This change will affect all Condensed Quote windows, whether they are opened or closed.

**4.4 Movable Columns**

The columns in all **Quote Windows** have the ability to be moved.

To Move:

- Simply left mouse click and hold on the column you would like to move
- Then Drag the column to the location where you want the column moved to and release the left mouse button

#### 4.5 Market Watch Window

This feature allows you to view the Market Watch Window. The window monitors the major market indices that are used as barometers for trading U.S. stocks.

**Market Watch Setup** (See fig 4-4) allows you to choose the **symbols** that you would like to view in the Market Watch window and allows you to label them accordingly.

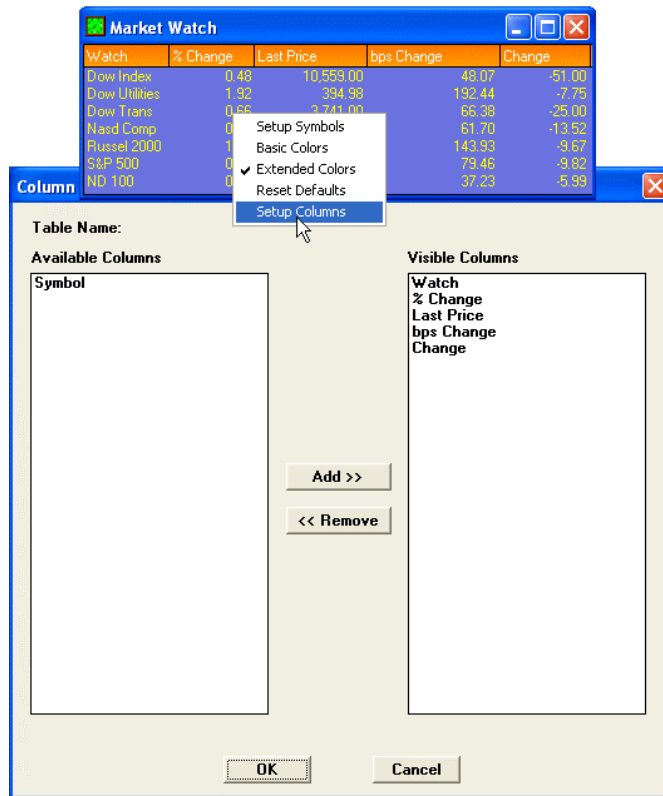


The screenshot shows a window titled "Market Watch" with a table of market indices. The table has five columns: "Watch", "% Change", "Last Price", "bps Change", and "Change". The data is as follows:

Watch	% Change	Last Price	bps Change	Change
Dow Index	0.49	10,558.00	49.01	-52.00
Dow Utilities	1.91	395.05	190.70	-7.68
Dow Trans	0.66	3,741.00	66.38	-25.00
Nasd Comp	0.63	2,177.51	63.02	-13.81
Russel 2000	1.45	662.11	144.83	-9.73
S&P 500	0.81	1,225.90	80.59	-9.96
ND 100	0.39	1,602.47	38.97	-6.27

**Figure 4-3:** The Market Watch Window.

Right mouse click on the Market Watch for color, symbols and columns. To change the column choose Setup Columns from the pull-down menu and add/remove the columns of choice.



**Figure 4-4: Market Watch Setup Box**

#### 4.6 Top Ten Window

This feature is a Pre-set OEM which has been selected to enable you to view the real-time status of the New York Stock Exchange, NASDAQ Stock Market and the American Stock Exchange Top Ten most active percentage gainers and losers (See fig 4-5).

Symbol	Exch	Company Name	Last	Change	%Chng	Previous	Volume
INTC	CIN	Intel Corporation [NNM]	24.250	-0.220	-0.8991	24.470	60,074,360
QQQQ	NAS	Nasdaq-100 Trust, Series I - Nasd [NNM]	37.980	-0.160	-0.4195	38.140	54,661,296
JDSU	CIN	JDS Uniphase Corporation [NNM]	1.916	-0.104	-5.1485	2.020	46,136,228
AMAT	NAS	Applied Materials, Inc. [NNM]	17.570	0.080	0.4574	17.490	41,420,204
MSFT	PSE	Microsoft Corporation [NNM]	25.780	-0.150	-0.5785	25.930	36,809,548
SIRI	NAS	Sirius Satellite Radio [NNM]	6.070	0.100	1.6750	5.970	31,154,532
CSCO	NAS	Cisco Systems, Inc. [NNM]	17.820	-0.100	-0.5580	17.920	30,630,928
NTAP	NAS	Network Appliance, Inc. [NNM]	31.390	-2.970	-8.6438	34.360	22,898,260
ALTI	NAS	Altair Nanotechnologies, Inc. [SCM]	4.349	0.140	3.3262	4.209	20,305,416
AAPL	NAS	Apple Computer, Inc. [NNM]	89.230	0.820	0.9275	88.410	19,819,658

**Figure 4-5:** An example of the Top Ten Window.

The Exchange, Most Up, Most Down, and Most Active can be selected in the drop down menu located in the top right corner of the Top Ten Window.

#### 4.7 Fundamental Quote Window

The **Fundamental Quote Window** (shown in fig 4-6) enables you to view statistical, fundamental and technical data for most any symbol that is entered.

The **Fundamental Quote Window** (also known as Quick Quote) can be accessed as follows:

- Click on the “**Q-Quote**” button in the **blue hot keys menu**.
- Enter a symbol.
- Click **Ok**.

It is possible to open additional **Q-Quote Windows**; this can be done in the following way:

- Click on **New Window** in the **Menu Bar**.
- Click on **Quick Quote**. A **Symbol Input** box appears.
- Enter your desired Symbol.
- Click on **Ok**. A new Q-Quote window will open.

In order to see more of the fundamental data place the cursor on the lower right outline of the window, when the double arrow appears, click, hold, and drag the window outwards. Right click on the window to change your color preferences, setup display items, or link the window.

Dynamic Quote--INTC Intel Corporation [NNM]					
2005/05/13 10:42		INTC	25.13	0.29	Sz: 50000 NAS
Open	25.00	Assets	23478.00	Yr4 Rev	Yr1 EQ/PS
High	25.15	Liab	8573.00	12 Mo EPS	Yr2 EQ/PS
Low	24.90	Pay Date	0000/	Earn/Shr	1.245 Yr3 EQ/PS
Prev	24.84	Est An Div	0.32	Cur Yr EPS	Yr4 EQ/PS
5Y Growth	1.882	ExDiv Dt	2005/05/04	Int Er Per	Ask Size 37300
Bid	25.13	Div Amt	0.080	Intrm EPS	Attr
Ask	25.14	Yr1 Div		Nxt Yr EPS	Bid Size 69400
Last	25.13	Yr2 Div		Yr1 EPS	1.159 Next 65491
Change	0.29	Yr3 Div		Yr2 EPS	0.85 Price 25.130
Vol	17,751,860	Yr4 Div		Yr3 EPS	Pr Type 0
OI	0.000	SP Rank		Yr4 EPS	Pr Units
52 High	29.01	Yr1 Net		Cal Sym Rt	Size 50000
52 Low	19.64	Yr2 Net		Desc	Comp Intel Corporation [NNM]
STARS		Yr3 Net		Con Exp Dt	0000/ Group
Shares Out	6173	Yr4 Net		Put Sym Rt	Symbol INTC
Cont Size	0	Yr1 Rev	34209.00	Strike Pr	0.000 Excg NAS
Yield	1.288	Yr2 Rev	30141.00	Pr to \$	0
Beta	2.353	Yr3 Rev		PE	19.9518

**Figure 4-6:** An example of the Fundamental Quote Window.

#### 4.8 Import Symbols to Quote Pages

You can import symbols to your Detailed or Condensed Quote pages from your portfolio pages in the following way:

- Click on **Symbol** in the Menu Bar.
- Click on **Import Symbols from Portfolio Page**. A list of available portfolio pages will appear.
- Select/ highlight the page you would like to import.
- Click **Ok**. A message box will appear telling you how many symbols were added.

**Note:** The program will not add symbols that are already present in the page.

## 4.9 Replace Current Quote Page

You can replace your Current Quote Page in the Detailed and Condensed Quote windows in the following way:

- Click on the **Replace Current Page** (shown in fig. 4-9) drop-down box in the **Icon Bar** just below the Menu bar.
- Make your selection from the drop-down menu.

The Replace Current Page drop-down box is the first drop-down box that appears in the Icon bar and it will have the name of the current quote page displayed in it.

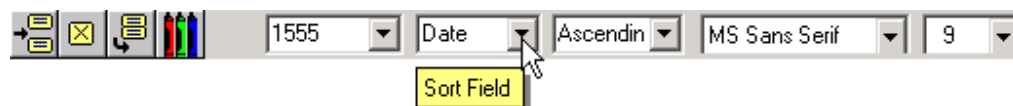


**Figure 4-9:** The Replace Current Page drop-down box.

## 4.10 Sort Field/Page

In the Detailed Quote window it is possible to sort the data in any field. This is done in the following way:

- Click on the **Sort Field** drop-down box (shown in fig. 4-10) in the **Icon bar** just below the Menu bar.
- Select the field you like to have the table sorted on.



**Figure 4-10:** The Sort Field drop-down box.

It is also possible to sort the table in ascending or descending format. This is done in the following way:

- Click on the **Sort Order** drop-down box (shown in figure 4-11) in the Icon bar just below the Menu bar.
- Select from either **Ascending** or **Descending** to sort your data accordingly.



**Figure 4-11:** The Sort Order drop-down box.

**Running Sort** Refreshes a sort every 3 seconds. Works well when sorting by value that fluctuates such as Change, Last, etc... To activate a Running Sort, select **Setup** on the Main Menu Bar and click **Running Sort**. If there is a check mark next to Running Sort, it is activated and should be displayed.

#### 4.11 Font Selection

This function allows you to choose the exact font style and font size of the text inside the Detailed and Condensed Quote windows. This is done in the following way:

- Click on the **Font Selection** drop-down box or the **Font Size** drop-down box, both of these are (shown in fig. 4-12)
- Make your selection from the drop-down menu.



**Figure 4-12:** The Font Selection and Font Size drop-down boxes.

## 4.12 Viewing Charts from the Detailed Quote Page

It is possible to split your Detailed Quote page up so that you can also view the charts of the symbols (See fig. 4-13). This can be done in the following way:

- Click on **View** on the Menu bar.
- Click on **Chart Bottom** or **Chart Right**.

You can view different chart by:

- Clicking on the Symbol whose chart you would like to view in the Symbol column in the quote page.

You can customize the chart by:

- Move your mouse over the chart
- **Right** click to bring up the selection menu.
- Click on your choice.

You can remove the chart from your Detailed Quote page in the following way:

- Click on **View** on the Menu bar.
- Click/uncheck **Chart Bottom**.

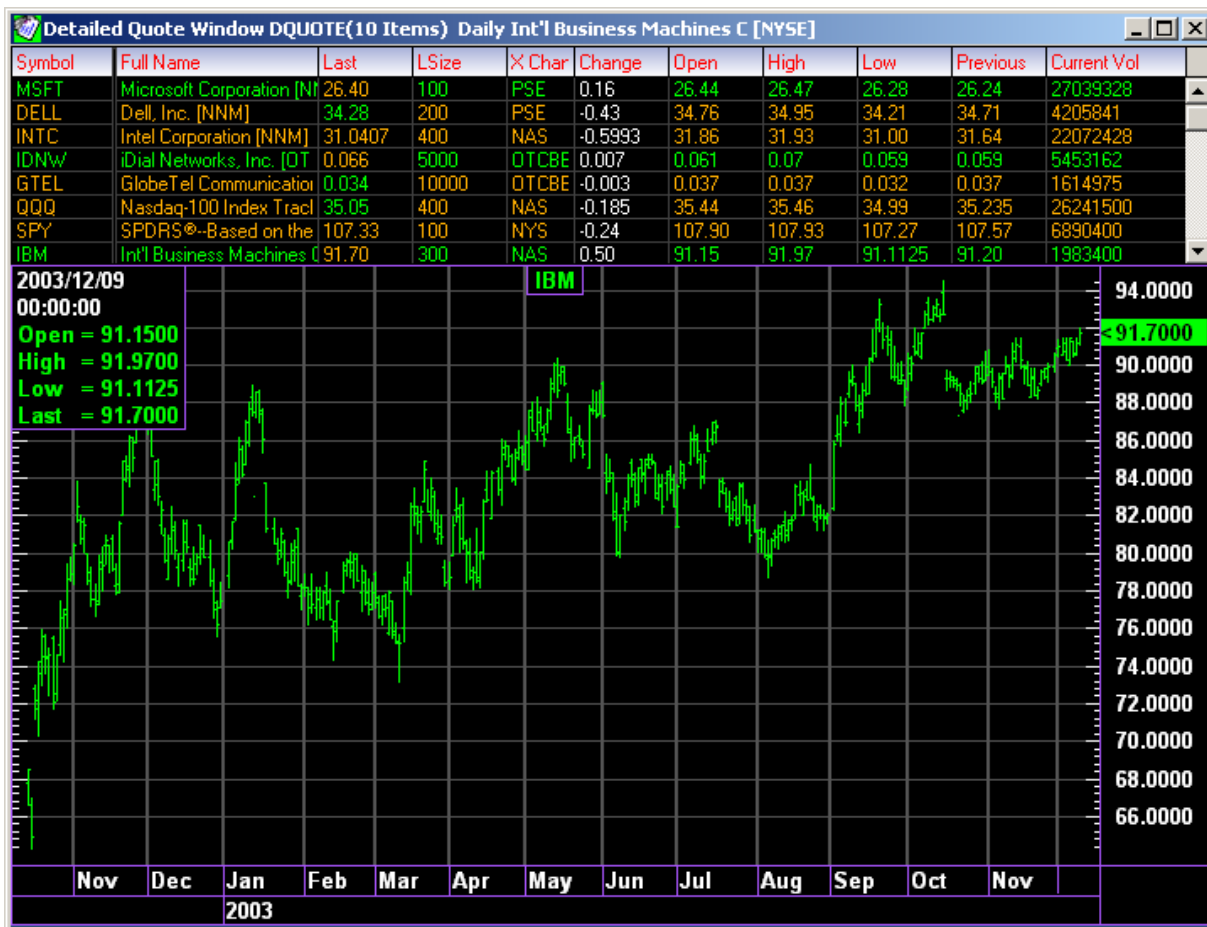


Figure 4-13: An example of chart in the Detailed Quote window.



## 5.1 Opening a New Chart

To open a New Chart:

- Click on the **Chart Key** in the blue Hot Key Menu.
- Enter a **Symbol** in the Symbol Input box.
- Click **Ok**.

To create additional charts:

- Click on **New Window** in the Menu Bar.
- Highlight and click **Chart Window**.
- Enter a **Symbol**.
- Click **Ok**. The **Chart Scaling** box will appear (see fig. 5-1)
- Set your desired Period of Time, Price Scaling, and % Change Customize.
- Click **Ok**.

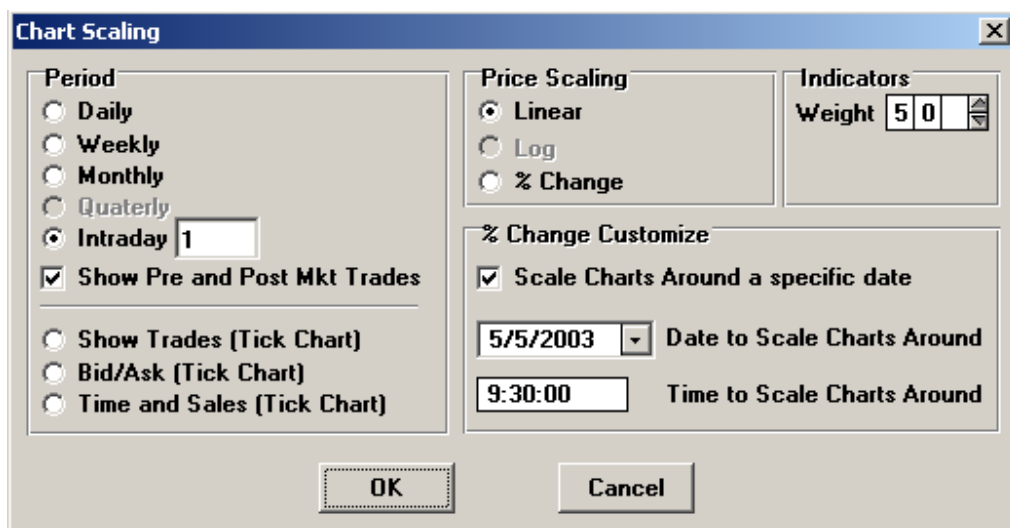


Figure 5-1: The Chart Scaling box

## 5.2 Replacing a Chart Symbol

There are various ways of replacing a chart symbol:

- 1) The quickest way to change a chart symbol is to activate the chart window, and type the symbol, hit the **Enter** button.
- 2) With the **Chart window** active hit the **Space Bar** and the **Symbol Selection box** will appear.
- 3) Click the **Replace Current Chart button** on the **Icon Bar**.

- 4) Highlight a chart and click the right mouse button and choose the **Replace Chart** option.

Refer to the symbol lookup section for more information on selecting a symbol.

### 5.3 The Icon Bar

Refer to section 2.2

### 5.4 Right Mouse Click Menu

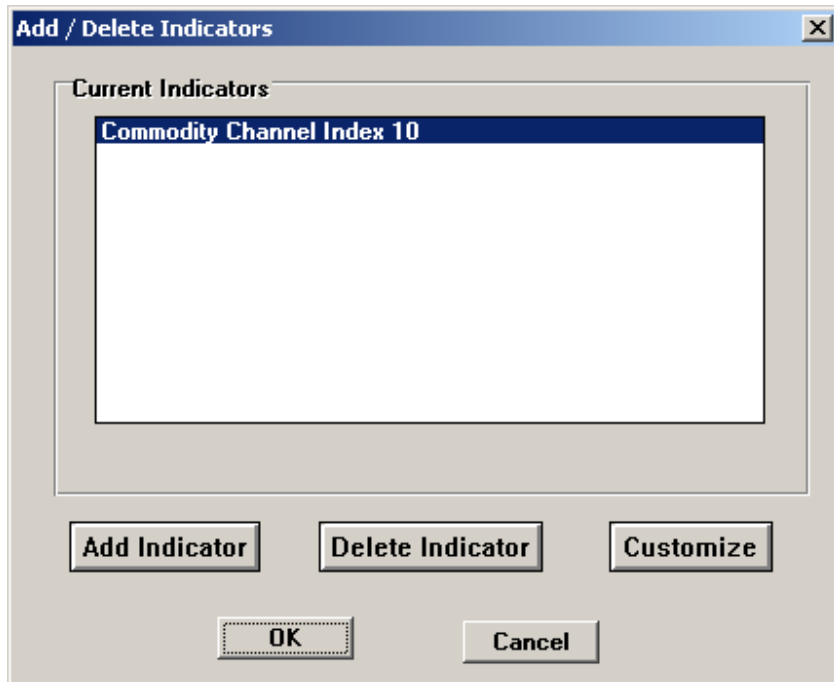
To activate the right mouse click menu do the following:

- Make the window active by left clicking on it.
- Position the mouse over the active window.
- Right click. A Menu box will appear.
- Highlight and choose an option.

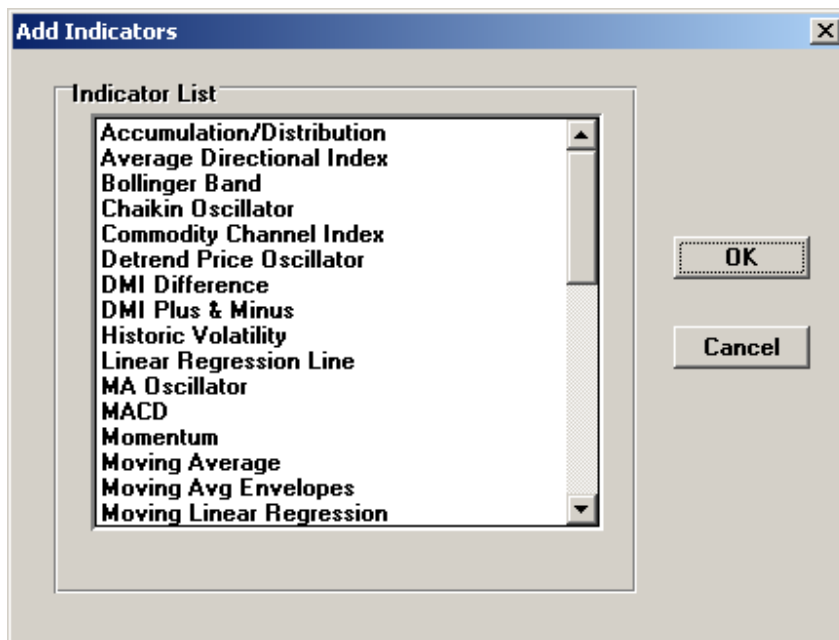
### 5.5 Adding an Indicator

An Indicator can be added in the following way:

- Click on the **Chart Window** to activate it.
- **Right** click your mouse while holding it over the active window.
- Highlight and click on **Indicators**. An **Add/ Delete** box appears. (See fig 5-2.)
- Click on **Add Indicator**. A list of indicators will appear (See fig 5-3).
- Highlight and Click on the indicator you would like to add e.g. Moving Average.
- Click on **Customize**. Depending on which indicator you choose your customizing options will change.
- Click **Ok**.
- Click **Ok** again.



**Figure 5-2:** The Add/ Delete Indicators box.



**Figure 5-3:** The Add Indicators box

**Note:** Trend Lines are now available for indicators. Right click on the indicators and select Trend Mode. A user can then draw a trend line, or multiple trend lines, in the indicator section. Once a trend line is drawn, it cannot be moved into another section of the chart window. To remove a trend line, right click on the line and select “remove