



*Netfeed Technologies, Inc.*

# Quick Start Guide

## *Visual Intelligence Portal*

### SmartList™

SmartList™, SmartAlerts™, SoftStop™,  
webHeatmaps®, Nasdaq Level 2 Quotes

Version 2.1

February 27, 2004

For more information visit the **Netfeed Technologies Corporation** web site: <http://www.netfeedtech.com/>.

**Technical support,**

**e-mail**

[support@netfeedtech.com](mailto:support@netfeedtech.com)

**web site support**

[http://www.netfeedtech.com/support/support\\_smartlist.htm](http://www.netfeedtech.com/support/support_smartlist.htm)

**Copyright by Netfeed Technologies Corporation**

This User Guide is copyrighted and all rights are reserved. This document may not, in whole or in part, be copied, photocopied, reproduced translated, reduced to any electronic medium or machine readable form without prior consent, in writing, from Netfeed Technologies Corporation. The information in this document is subject to change without notice. Netfeed Technologies Corporation assumes no responsibility for errors that may appear in this document.

---

#### **Corporate Headquarters**

640 Johnson Avenue, Ste. 1

Bohemia, NY 11716

[www.netfeedtech.com](http://www.netfeedtech.com)

General Info: [info@NetfeedTech.Com](mailto:info@NetfeedTech.Com)

Tech Support: [support@NetfeedTech.Com](mailto:support@NetfeedTech.Com)

Sales: [sales@NetfeedTech.Com](mailto:sales@NetfeedTech.Com)

URL: <http://www.netfeedtech.com>

## Getting Started

Like any new software product, when you first encounter the SmartList you may be confused and lost because you don't know how to operate its features and functions. There are many built in capabilities that may be enabled and disabled and you may change the entire appearance of the display if desired. The full manual at the URL [http://www.netfeedtech.com/support/smartlist\\_referenceguide.pdf](http://www.netfeedtech.com/support/smartlist_referenceguide.pdf) describes the control and operation of all features. This Quick Start Guide just points out the **basic essentials to establish** a single portfolio with **SoftStop® (trailing stop) functionality** and/or high/low alerts.

## First Encounter with SmartList

This very first time you log into the SmartList you are presented with a display screen containing 3 charts along the top, then a **Quick Icons Control Bar** (Figure 1, caption 1) and a row of column headings. This is followed by rows of real-time stock market financial data. The Control Bar and default **Column Headings** (Figure 1, caption 2) appear as follows:

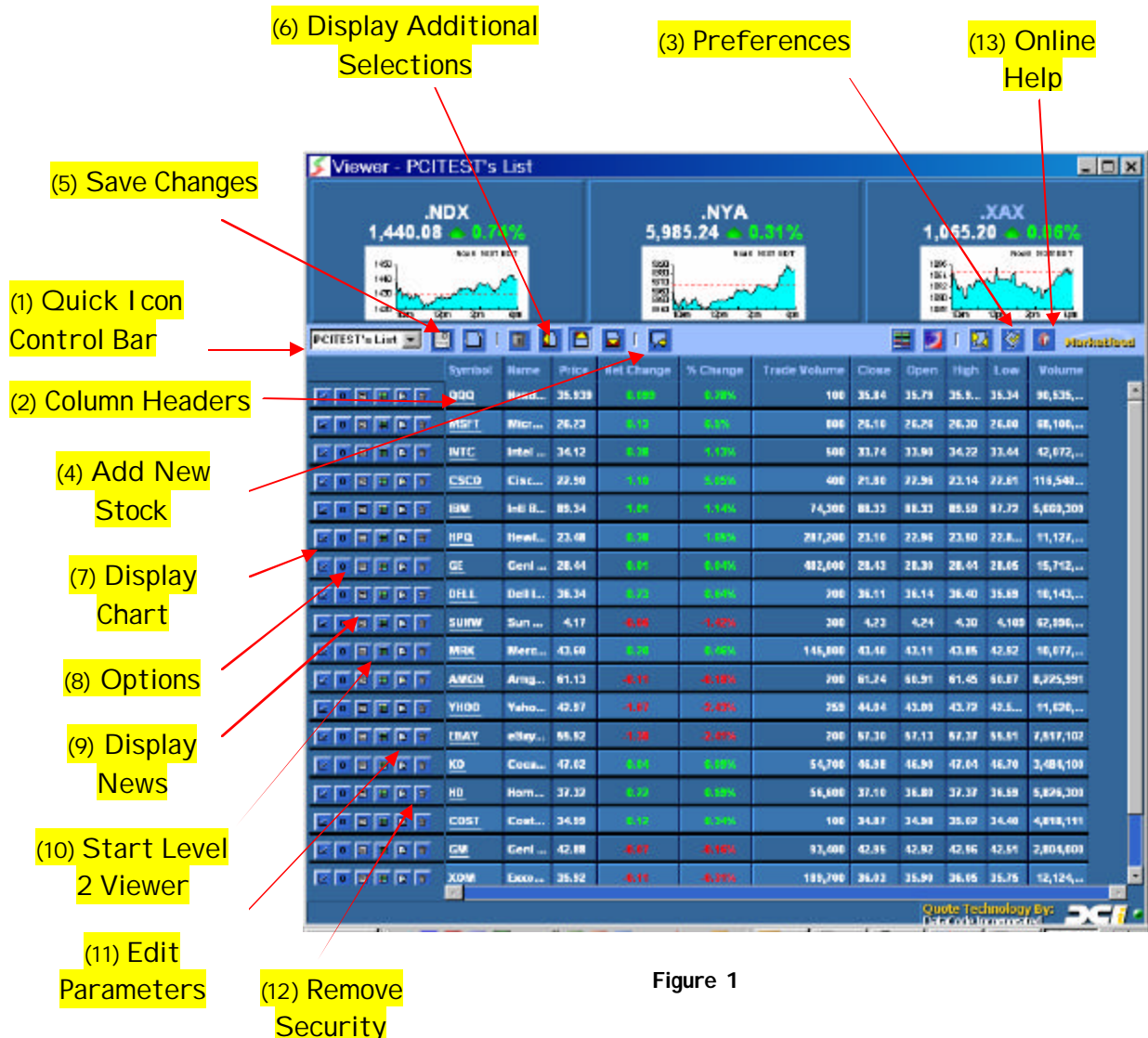


Figure 1

The **Quick Icon Control Bar** is used to rapidly access functions such as adding and deleting securities, setting preferences, adding portfolios, and more. You can learn the function of each icon by placing the cursor over the icon and waiting a few seconds for the name of the icon to appear. The second line contains the column headings under which that specific security data is shown for each security in the portfolio.

### Setting Your Preferences

There are several settings under your control. We'll set up the most import settings for SmartLists with SoftStops at this point. Go to the **Preferences** pop up window (Figure 2) by pressing that **Preferences - (Figure 1, caption 3)** icon on the Quick Control Bar.

Figure 2 - Preferences

The **Email Address** of where to send SoftStop Alert notices and reports should be listed. It is suggested that at least two different Email addresses are specified, given the importance of Alert messages. The first address might be your standard Email address while the second Email address might be that of your wireless device.

The Email/Text drop down is used to select if **HTML** or **Text Only** formatting is accepted at the specified Email address. **NOTE: Cell phone alert require text messages.** Be sure to set **Text Only** and your cell phone provider has enabled text messaging. Go to your provider's web site to determine your text message Email address.

After new Email addresses are entered, press the **Test** icon next to the address in order to insure that a test message is properly received.

The **SoftStop Summary Report Period** option can be set from this window to **None**, **Daily** or **Weekly** - providing a summary report on trading and the current value of the SoftStop point. Finally, the default **SoftStop Percent** may be changed from 20% to another value (as shown in Figure 2). Regardless of the default setting, the user may always override the SoftStop value for a particular security. Click **OK** to close this window.

## Setting Up Your Portfolio

The service initially displays a portfolio of many very active large cap businesses. For each of these securities, the data displayed is Symbol, Security Name, Current Price, Net Change from yesterday's close, the percent change from yesterday's close, the volume of the last trade, yesterday's closing price, today's opening price, today's high and low, and the total volume traded today. We will change these columns to ones that are more appropriate for monitoring SoftStops.

Symbol	Name	Price	Net Change	% Change	Trade Volume	Close	Open	High	Low	Volume

Move the cursor over any of the column headings such as **Trade Volume**, and *right click* to obtain a list of all possible columns (Figure 3) that may be displayed. You will see that those columns currently selected have a checkmark. You can make one change at a time by pointing at a line of the list that is not checked (which causes it to be checked and added), or at a line that is checked (which causes it to be unchecked and removed). **Add SoftStop Price, Price Paid, and remove Trade Volume.**

You can **change the width of any column** by moving the cursor to the left or right edge of the column next to the heading name and dragging it to the desired width while holding down the left mouse button. You can even change the order of the columns by pointing the cursor in the middle of the column heading name and dragging the column while holding down the left mouse button. And you can even change the sorting of the data on the display, by left clicking on a column heading. Click on the **Symbols** column to sort the portfolio in alphabetic order.

- % Change
- Alert Type
- Ask
- Ask Size
- Bid
- Bid Size
- Close
- Fees
- High
- High Limit
- Highest Attained Price
- Holding % Change
- Holding Cost
- Holding Net Change
- Holding Value
- Intraday
- Low
- Low Limit
- Name
- Net Change
- Open
- Price
- Price Paid
- Shares
- Soft Stop Percent
- Soft Stop Price
- Symbol
- Tick Trend
- Trade Volume
- Volume

**Figure 3**  
Column Headings

## Adding a Symbol and Setting an Alert

To add a symbol to the portfolio, point to any cell in the portfolio (not the heading lines) and *right click*. Point to the **"Add Entry"** selection (Figure 4) and a pop up window will appear. Enter the ticker symbol (**Instrument**) of the security to be monitored and click **OK** to put it into the portfolio.



**Figure 4**

To add an alert or SoftStop to this new security, point to any cell in the row of data associated with that security and right click.

DELL	Dell Inc	32.943	-0.387	-1.16%	100	33.33	33.20	33.27	32.84	5,295,663
------	----------	--------	--------	--------	-----	-------	-------	-------	-------	-----------

Select the **Edit** <symbol> selection (Figure 4) and another pop up window will appear. You may set the **Alert Type** to **SoftStop** or **Limit Alert**. Let's try SoftStop first by selecting that option for the symbol you just added. Notice that the default SoftStop percentage set in your preferences appears. In addition, if pricing data has already appeared against this security an initial SoftStop price has been set according to the current price and the percentage.

You may override the percentage directly on this screen or may override the SoftStop price. If the SoftStop price is overridden, the SoftStop percentage is recalculated for this security only and is redisplayed. The price paid should be entered so that you can quickly see your position on the portfolio display. Click **OK** to close this window.

To set a **High/Low limit alert** for a security, you follow the same steps as described above for SoftStop, except that you select **Limit Alert** as the Alert Type. Set the high and low value at which you wish to be alerted. When the price goes above the high or below the low, the ticker symbol will change to **Green** or **Red** respectively.

To remove a security from the portfolio, point the cursor to any cell of data associated with that security and right click. Point to the **Remove** <symbol> entry (Figure 4) to remove that symbol from the portfolio.

When you shut down the SmartList by closing its window, you are given the option of saving all changes you made to the portfolio during the day. As another option, you can click on the Floppy Disk looking symbol on the **Quick Control Icon Bar** (Figure 1, caption 5), and changes will be saved immediately.

You are now ready to modify the portfolio on the screen by removing those securities you do not wish to view and adding those of interest to you.

## Viewing Additional Security Details

To view additional detailed information regarding a particular security point the cursor to the ticker symbol and left click.



### Additional Icons for Editing and Launching Apps

Figure 1 shows icons on the left side of each security. These icons are made visible by selecting the **Display Additional Selections** icon (Figure 1, caption 6). The icons (Figure 1, captions 7 - 12) provide,

- **Display Chart** Displays a yearly activity chart
- **Options** Displays options for the security (if applicable).
- **Display News** Displays associated news for the security.
- **Launch L2** Opens the Level 2 window (if option is available).
- **Edit Parameters** Alternate way of editing parameters for a security.
- **Remove Entry** Alternate way of removing a security from the portfolio.

### Online Help and Technical Support

When you require assistance with features and capabilities of VIP select the **Online Help** icon (Figure 1, caption 13). The Netfeed Technologies support page is displayed. From this page you may,

- View **Frequently Asked Questions**
- View **the VIP SmartList User Guide**,
- Request assistance using Email to the **VIP SmartList** Support Team

You may also Email the **VIP SmartList** Support Team using the Email address of [support@netfeedtech.com](mailto:support@netfeedtech.com).