Advanced Dashboard
Getting Started Guide
Welcome to Advanced Dashboard, our flagship web-based trader platform.

Advanced Dashboard offers an intuitive and powerful set of capabilities designed to allow you to trade quickly and with increased confidence.

This guide is meant to provide an overview of the platform's most important features so you can start trading immediately.

To dig deeper, click here to access our online help page or contact the Help Desk at 1-866-638-5258.
Getting Around

Logging In

Start trading on Advanced Dashboard in **three easy steps**!

1. Log-in to **WebBroker**
2. Click on **Advanced Dashboard** in the upper right-hand corner of the window
3. Click **Launch Advanced Dashboard**

#TraderTip: Add Level II and other market data feeds to your subscription by clicking "Modify my package".
Getting Around

At the top of your screen, you'll see the **Navigation Pane**.

1. The **Search Symbol** box at the top lets you look up symbols quickly and easily by entering a name or symbol. It will also auto-suggest symbols and names as you type.

2. The **Add Components** and **Layout** buttons will allow you to create Custom Views to suit your needs.

3. You can click on **Settings** to further customize your Advanced Dashboard experience.
At the bottom of your screen, you'll see the **Trading Bar**.

1. The **Buy/Sell** button opens an order entry ticket to create new stock and option orders.

2. Open the **Order Status** window to view, change, copy, and cancel any of your orders.

3. The **Holdings** button allows you to view, filter, close, and combine your positions.

4. Click on the **Trade Preferences** button to customize the default stock and option order settings.
Docking & Undocking

To extend your trading onto multiple screens, click on the 'Undock' button located in the upper right corner of any component to open it in a separate window.

The Trade Bar in the bottom right corner allows you to undock any of the Buy/Sell, Order Status, Holdings, or Trade Preferences windows so that you can move them to another monitor. In 'Multiple Undocked' mode, you can have multiple windows opened simultaneously.

To switch to docked mode, select the 'Single Undocked' option in the Trade Bar.
**Getting Around**

### Component Controls

1. **Settings** icon to customize the component.
2. **Link Mode** icon to change the component's broadcast/receive behaviour (see Linking).
3. **Show/Hide** icon to toggle configuration options.
4. **Undock** icon to detach components to their own separate window.
5. **Maximize/Restore** icon to toggle the component view between maximized and regular mode.

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**TraderTip:**
Click on in Charts to bring up a window showing all the technical indicators, tools, and markers.
Advanced Dashboard has a variety of built-in trading layouts to help you get started.

Trading tools are laid out and linked together to provide single-click analysis that caters to every trading style.

1. Today
2. Trade
3. Charts
The Today view provides an at-a-glance display of your portfolio and of what sectors and stocks are moving the markets.
Heat Maps provide a visual representation of what’s driving the markets.

Markets component provides real-time data for major Canadian and U.S. indices.

Most Active component shows the stocks and options with the largest trading volumes.

Alerts allow you to create, view, and modify real-time notifications for stocks and options.
See detailed stock and options quotes, news, analyst estimates, and analytics for any security with (1) **Watch List**, (2) **Quote Detail**, (3) **Option Chain**, and (4) **Analytics** components.
Quote Detail displays quotes, News, and Analytics for a single security. In the Market Depth tab, switch between the Market as Ladder and Market by Price views.

Option Chain displays real-time data for a selected symbol so you can easily analyze call and put options.

Option Chain Graph allows you to visually compare key variables across a number of different option series and expirations.

Analytics allows you to view key data relating to both the company and security in question. View information such as the company profile and financial statements, earnings and ratios, analyst evaluations, and trade history.
Perform advanced analysis by creating customized charts based on fundamental and technical indicators. With a diverse set of technical studies, probability analytics, and drawing tools, create and customize (1) **Charts** for every security on your (2) **Watch List**.
Creating a **Custom Layout**

1. Click on the 'Manage My Layouts' button in the top navigation bar.

2. Choose between **Flexsheet**, **Desktop**, or **Accordion**:
   - **Flexsheet** allows you to define spaces and choose which components to place where
   - **Desktop** gives you ultimate flexibility and allows for overlapping components
   - **Accordion** allows you to vertically stack different components for you to scroll down

3. To add components to your Custom View, either:
   - Click on within the custom view window
   - Click on in your navigation bar
   - Right-click anywhere in the custom view window

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**#TraderTip:** In Flexsheet layout, drag in from the outside edge to create a new window. Drag it back outwards to get rid of it.
Three Customizable Layouts

1. Flexsheet
2. Desktop
3. Accordion
Layout Library

Browse through your own layouts, share them with other Advanced Dashboard users, or add theirs to your library.

1. Open the Layout Library by clicking on the ‘Manage Layouts’ button located on the main navigation bar

2. The Library is comprised of three distinctive categories: My Layouts, Layouts by TD, and Layouts by Other Users:

   - In 'My Layouts', you can publish your own customized layouts and share them with all other Advanced Dashboard users.
   - In 'Layouts by TD', you can view layouts published by TD Direct Investing and add them to your own library.
   - In 'Layouts by Other Users', you can view layouts published by other Advanced Dashboard users and add them to your own library.
To open the **Order Ticket**, either click on the **Buy/Sell** button in your Trading Bar or click on the **Bid** or **Ask** price of any stock or option.

Choose which **account** to trade from.

Choose the **security type** and name.

Specify the **details** of your trade.

To close the order ticket, just click the **Buy/Sell** button again.

**#TraderTip**: You can also undock the order ticket to turn it into a separate window!
Rapid Order Entry capabilities in Advanced Dashboard are designed to allow you to make trades and enter orders even faster so you never have to miss an opportunity.

**Skip Preview Orders & Warnings**
Enabling this allows for rapid order entry capabilities so you can send your trades direct to the market. You will bypass the Review screen and will not be asked to confirm your order, review warnings, or review commissions.

**Remember Password**
Enabling this prevents you from having to enter your password every time you make a trade during the current session.

These settings persist for the entire session. To reset, close and relaunch the Dashboard.
With **Linking Mode**, you can get the whole picture on a stock with just a single click.

- The Linking Mode icon looks like this: 📤. It allows you to customize how tools communicate with each other.

- Once you set up your links, you can link multiple components across the platform so they all change simultaneously to the stock you're looking at.

- So, if your Watch List is set to **broadcast on Channel 1** and your Market Depth is set to **receive Channel 1**, clicking on a symbol in your Watch List cause your Market Depth window to display that symbol.

- If you wish to broadcast symbols across all layouts, select 'Broadcast Globally' within the Link Mode window.

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**Set the channel that the component listens on**

**Broadcast symbols across the entire platform**

**Set the channel that the component broadcasts to**

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**Link Mode Quote Detail**

- Enable/Disable broadcast channels
- Receive from Channel: □ All □ Global Search □ Channel 1
- Broadcast to Channel: □ All □ Global Search □ Channel 1

**OK** **Cancel**
Heat Maps

Change how you view the Heat Map by using the (1) Index, (2) Colour by, (3) Size by, and (4) Group by drop-down menus.

Double-click on a box to view the full quote of the stock.

This displays the colour scale being used on the Heat Map.
Building New Watch Lists
1. From any tab, go into the Watch List component
2. Search the symbol or company name you wish to add
3. Press "Enter"
4. When you're done, click on \(\text{Add}^{\downarrow}\) and select "Save List"

Importing Watch Lists
1. Click on \(\text{Add}^{\downarrow}\) in the Watch List component window
2. Select "Import TD Active Trader Watchlist"
3. Choose the file you wish to import and click "Import"

Managing Column Headers
1. Click on \(\text{Add}^{\downarrow}\) in the Watch List component window
2. Select "Manage Templates"
3. Add or remove columns
4. Click "Close"
Charts

Advanced Dashboard has dozens of studies, indicators, drawing tools, and probability analytics for you to use to enhance your trading.

Adding Studies
1. Right-click on the chart and select "Tools & Markers"
2. From the drop-down list, choose which studies you wish to add

Adding Indicators
1. Right-click on the chart and select "View Options", then "Indicators"
2. From the drop-down list, choose which indicators you want to add

#TraderTip: Click on the button to bring up a window showing all the indicators, tools, and markers!

#TraderTip: the button, found in the top right corner of the chart window, allows you to customize the tool further!
**Charts**

**Advanced Probability Analytics** within the Charts component helps you validate your trades using market expectations.

**Probability Range tools** estimates the range of expected prices with a 68% and 95% degree of confidence.

**Price Target drawing tool** estimates the likelihood that a security will be above, below, and will touch a certain price by a certain date.

#TraderTip: Extend your analysis farther into the future by entering a larger number in the "Right-Side Expansion" box.
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