

Charts By TRADEway Cheat Sheet

✓ How to enter a stock trade:

1. Pull up the **correct stock** and click the **Trade button** near the top right.
2. In the window **adjust your share quantity**.
3. Move the **red line on the chart** to set your stop loss.
4. Move the **green line on the chart** to set your profit target.
5. In the window **ensure the reward** to risk ratio is adequate.
6. In the window **review your planned risk AND total risk**.
7. Once the trade is set up as you desire then **click Trade to proceed**.
8. **Double check** you are in the correct account.
9. Review the **trade ticket** for accuracy.
10. Make sure the **exit order duration** is set to GTC.
11. **Click Review** to proceed.
12. If the review page looks good, then **click Submit**.
13. If a Success pop up window appears this means **the trade ticket has been submitted** to the market maker. This does not mean your trade has been executed. Click continue and the Order Status tab will automatically appear.
14. **Check the Order Status tab** for an Executed Buy order and for two Live orders (stop loss and limit order for profit).

✓ How to exit a stock trade:

1. Go to your Order Status tab and **cancel any Live closing orders** for the trade you want to exit.
2. Go to your Positions tab and **click Close on the ticker** you want to exit.
3. Choose either a limit price to exit or **select Market order**.
4. When the closing order ticket looks good **click Review to proceed**.
5. **Double check the info** on the pop-up window and click Submit.
6. If a Success pop up window appears this means **the trade ticket has been submitted** to the market maker. This does not mean your trade has been executed. Click continue and the Order Status tab will automatically appear.
7. Check the Order Status tab **to ensure your trade has been Executed**.
8. If the closing order says Live, then you are still in the trade. You may need to Cancel the order, **then click Reuse and adjust the limit price**.
9. Repeat steps 3-7.

✓ How to enter an options trade:

1. Pull up the correct ticker and **click the Options button** near the top left.
2. Select your **expiration date** from the pop-up window.
3. Find the options you want to **buy or sell in the options chain**.
4. Click the **Ask number** to buy or the **Bid number** to sell.
5. Ensure the **number of contracts is as desired**.
6. **Check the risk graph** on the right to ensure you fully understand the risk.
7. Once you **understand the risk AND accept the risk** then click Trade near the top right.
8. Double check you are in the correct account and **review the trade ticket for accuracy**.
9. Choose your **limit price** using the slider.
10. Click Review when **ready to proceed**.
11. If the **review page** looks good, then click Submit.
12. If a Success pop up window appears this means **the trade ticket has been submitted** to the market maker. This does not mean your trade has been executed. Click continue and the Order Status tab will automatically appear.
13. Check the Order Status tab for an **Executed Buy order**.
14. If the opening order says Live, then **you are NOT in the trade**.
You may need to **adjust your limit order** by clicking Cancel and then Reuse and then adjusting the order.
15. Repeat steps 9-13.

✓ How to exit an options trade:

1. Go to your Order Status tab and **cancel any Live closing orders** for the trade you want to exit.
2. Go to your Positions tab and **click Close on the ticker** you want to exit.
3. **Choose your limit price** using the slider.
4. Click Review when **ready to proceed**.
5. If the review page looks good, then **click Submit**.
6. If a Success pop up window appears this means **the trade ticket has been submitted** to the market maker. This does not mean your trade has been executed. Click continue and the Order Status tab will automatically appear.
7. Check the Order Status tab for an **Executed Sell order**.
8. If the closing order says Live, then you are still in the trade. You may need to Cancel the order, then **click Reuse and adjust the limit price**.
9. Repeat steps 3-7.