TRADE NAVIGATOR
QUICK START GUIDE

A NEW ERA OF CHARTING FROM

Genesis Financial Technologies

Welcome to the powerful world of Genesis Financial Technologies and the Trade Navigator. Since 1984 thousands of market professionals, investors, brokerage firms, and successful traders have relied on the products and services of Genesis Financial Technologies.

This quick start guide covers the common areas of the Trade Navigator software to get you up and running quickly and painlessly. Here you will find quick, easy ways to get started with:

Using the Help System
Downloading Data
Quote Board
Changing Symbols
Adding to the Chart
Drawing Tools
Chart Templates and Pages
Trade Console
Instant Replay
Trader's Toolbox
Creating and Viewing a Filter

For more detailed information be sure to check out Help Topics in the Help Menu in Trade Navigator.

Contacting Genesis

For technical support of the Trade Navigator software program please contact:

Technical Support Team

Genesis Financial Technologies
425 E. Woodmen Rd
Colorado Springs, CO 80919
(719) 884-0245 (719) 260-6113 FAX
support@genesisft.com

Billing Department

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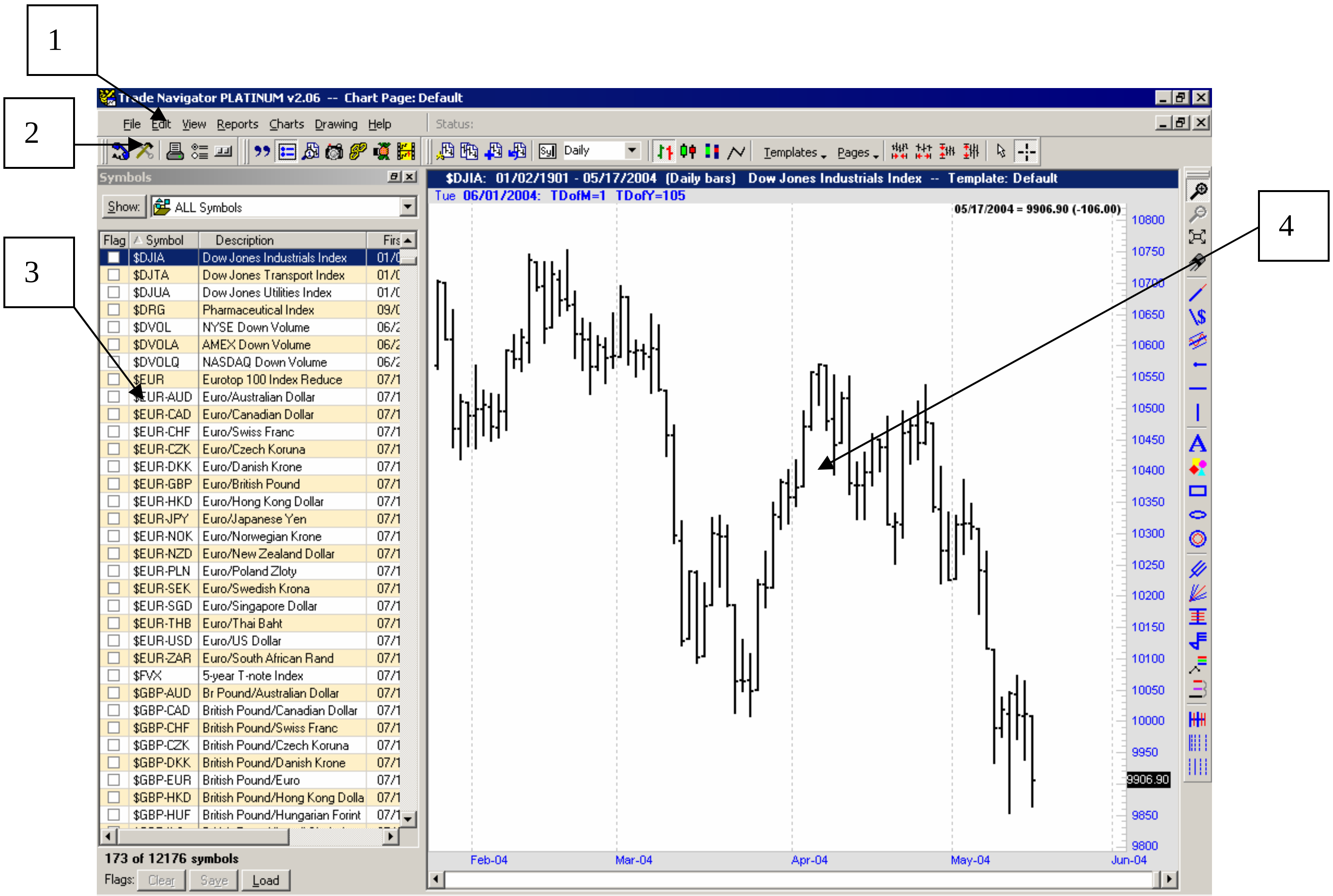
Trade Navigator Main Screen Overview

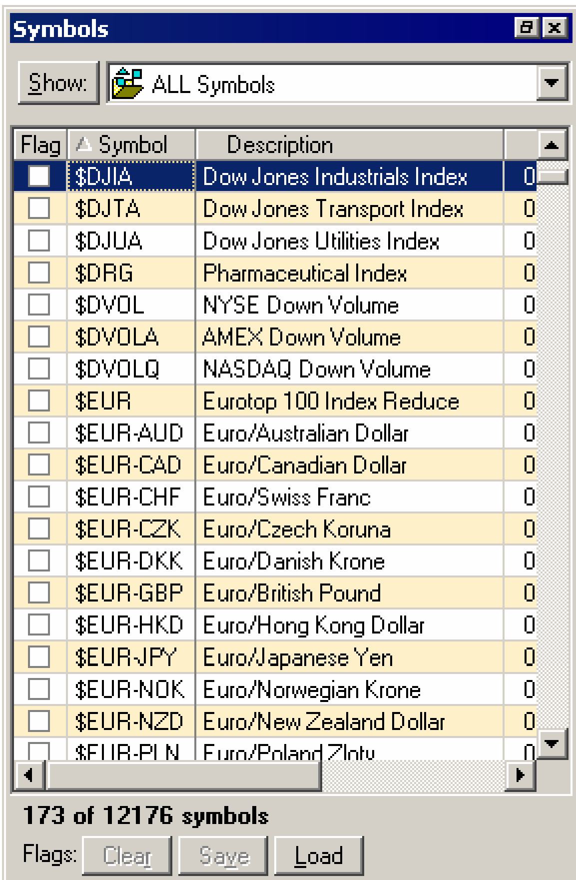


(1) Main Menus
(2) Toolbars
(3) Symbol Grid
(4) Chart

The Menus allow you to access most of the main features of Trade Navigator with just a few clicks of the mouse.

The Toolbars give you access to the items that you use the most with just one click of the mouse. The Toolbars can be customized to show only the items you chose.

The Symbol Grid will allow you to scroll through the list to find the symbol for the stock, commodity or index you wish to view. The symbol grid can be used to filter out the securities you do not need to see or create a symbol group which contains only the symbols you are currently tracking.



Hot-keys are keys on the keyboard that allow you to access a function with a single keystroke. For instance: To select a different symbol to view you can type the "S" key to access the symbol selector.

You can find a complete list of Trade Navigator hot keys in the Help Menu under Charting Hot Keys and Tips.

Using the Help System

The Help System will help you to learn and use the Trade Navigator program. The Help System together with Genesis Technical Support staff will help you to make the most of your Trade Navigator experience.

To access the Help System, go to the **Help** menu and click on the **Help Topics**.

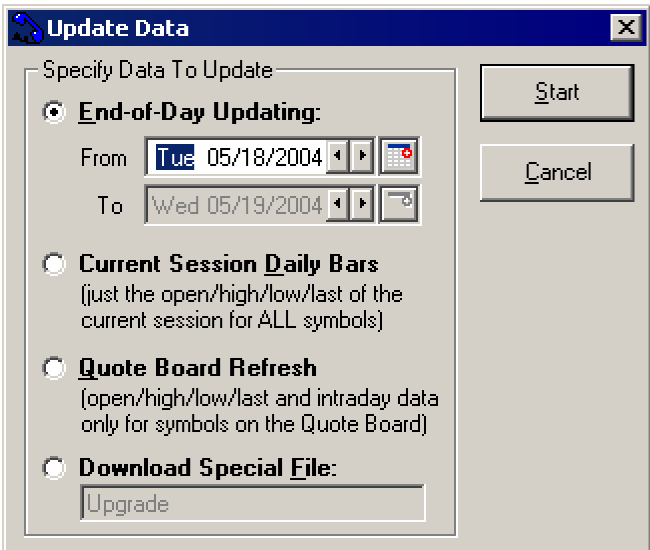
You can navigate through the Help Topics by clicking on the topics in the window on the left side of the screen.
Clicking on the **Index** tab allows you to scroll through subjects and click on the subject to view the topic.
The **Search** tab allows you to type in key words and search for subjects that way.

Some words are highlighted in blue; these words will take you to a page that relates to the word that is highlighted for more information. To return to a previous page simply click the Back button at the top.

If you need more personalized assistance please feel free to call the Genesis Technical Support at (719) 884-0245 or e-mail us at support@genesisft.com. We are here to help you.

Downloading Data

To update the data in Trade Navigator or to download special files, make sure that you are connected to the internet, click on the blue telephone on the toolbar; select the option you wish to use and then just click on the **Start** button.



End-of-Day Updating – This is the option you will use to collect the end of day (the complete day's data) for the previous trading day or days and to collect the complete days data for the current trading day after 4:30 pm Mountain Standard Time.

Current Session Daily Bars – This option allows you to collect a price bar that reflects what the market has done up to that time in the trading day.

Quote Board Refresh – This option allows you to collect a price bar and intraday (tick) data that reflects what the market has done up to that time in the trading day for the symbols that you have in your Quote Board.

Download Special File – This option should only be used when you are notified that there is an upgrade available or when a member of Genesis Technical Support gives you the name of a special file to download. You will be notified when upgrades are available through the News from Genesis that you will receive with your End-of-Day Updating from time to time.

For more information about downloading see the Help Topics in the Help Menu.

Quote Board

The Quote Board allows you to get quotes during trading hours for the symbols that you have added to your Quote Board. If you subscribe to tick data through Genesis, clicking the Refresh button on the Quote Board will update the intraday data for the symbols that you have in your Quote Board as well as giving you a daily bar reflecting what that symbol has done up to that point in the trading day.

You can view real time or streaming data in Trade Navigator for the symbols in your Quote Board provided you subscribe to those markets through Genesis or eSignal. (You must have the correct Genesis data subscription to view real time data)


Quote Board: hit 'Insert' to add symbol, 'Delete' to remove

Symbol	Period	Session	Open	High	Low	Last	Prev Close	% Change	Last Tick	Feed Symbol	Momentum	Close
$DJIA	Daily	05/18/04	9906.70	9987.05	9906.65	9968.50	9906.90	+0.62%			-703.5	9968.5
MSFT	Daily	05/18/04	25.70	25.97	25.64	25.83	25.54	+1.14%			-0.94	25.83
LMT	Daily	05/18/04	47.09	47.39	46.76	47.09	46.85	+0.51%			-1.66	47.09
IBM	Daily	05/18/04	86.08	86.49	86.00	86.06	85.53	+0.62%			-12.36	86.06
GM	Daily	05/18/04	43.50	44.17	43.40	44.11	43.40	+1.64%			-4.78	44.11
US-067 (Jun)	Daily	05/18/04	105^15	105^17	104^27	105^05	105^13	-0.24%			-6.25	105.16
TQ-067 (Jun)	Daily	05/18/04	105^04	105^11	104^27	105^05	105^13	-0.24%			-6.25	105.16
GC-067 (Jun)	Daily	05/18/04	379.0	379.2	375.5	375.9	379.6	-0.97%			-38	375.9

To open the Quote Board hold down the **Ctrl** key and type the letter ‘**Q**’.

To add symbols to the Quote Board click on the Quote Board and hit the **Insert** key on your keyboard. Then select the symbol you wish to add from the Symbol Selector and click **OK**.

To update the data in your Quote Board simply be sure you are connected to the internet and click the **Refresh** button.

For Quote Board refreshes and streaming data:
New York markets are 30 minutes delayed. Chicago markets are 20 minute delayed.
For more information about using the Quote Board see the Help Topics in the Help Menu.

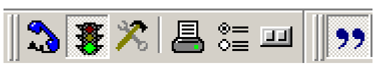
Real Time & Streaming Data

Real Time and Streaming data will update the symbols in your Quote Board and the symbol on your active chart.

Go to **Edit** and click on **Program Settings**, click on the **Real Time** tab and be sure that you have **Genesis** selected, next click on the **Save** button.

If you do not see a Stoplight icon on your Tool Bar, go to **View**, click on **Customize Toolbars** and scroll through the list until you find the Stoplight icon. Place a checkmark next to the Stoplight and click **Close**.

Now that you have the Stoplight icon on your Toolbar, simply click on it to start your streaming data. When the Stoplight icon turns green you are connected.



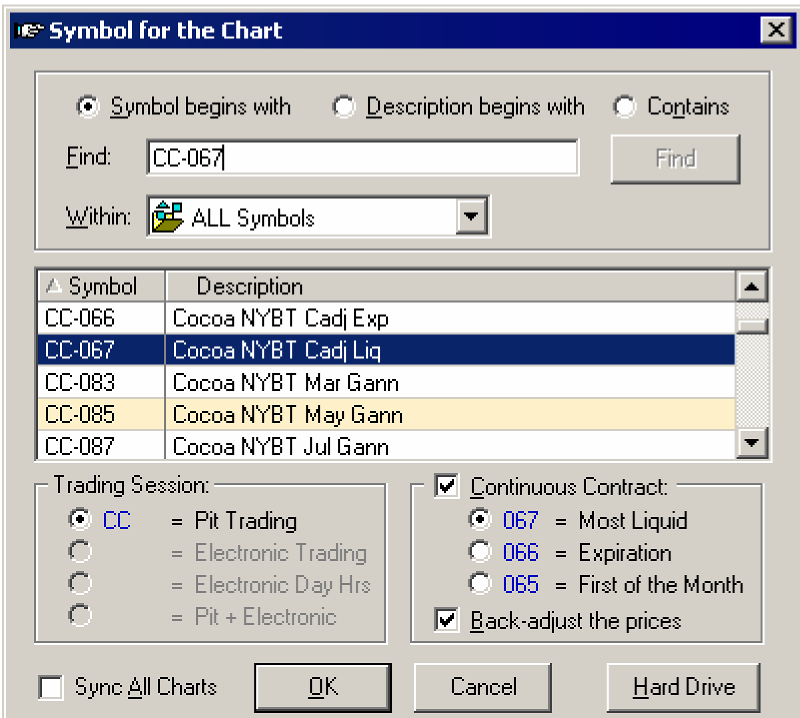
To disconnect from streaming data, simply click the Stoplight icon again.

Real time data requires that you have signed the appropriate agreement for the exchange that you wish to collect data from. Real time data allows you to see a continuous stream of data for the symbols from each exchange that you have signed up for as soon as the data is available.

Streaming data provides a continuous stream of data much like real time data. However, streaming data is delayed 10 to 30 minutes depending on the exchange.

Changing Symbols

To change the symbol being viewed on a chart click on the chart and then type the letter **S** on your keyboard. This will bring up the Symbol Selector. In the Symbol Selector you can scroll through the symbols, select the symbol you wish to view and click **OK**.



You can type the symbol in if you already know the symbol or you can use the search options.

Symbol begins with – This option scrolls through the list as you type to take you to the section of the list where the first letters of the symbols match what you are typing.

Description begins with – This option scrolls through the list as you type to take you to the section of the list where the first letters in the descriptions match what you are typing. This allows you to find the symbol that you are looking for by typing the first few letters of the name.

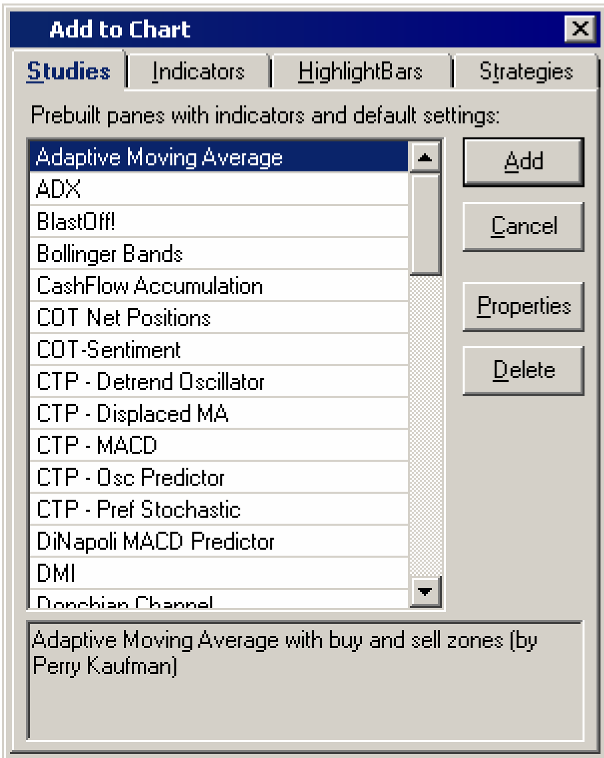
Contains – This option allows you to filter for all of the symbols or descriptions that contain the word or letters that you type in. After typing the word or letters click the Find button and then only symbols or descriptions that contain what you have typed will appear in the list.

Within – You can use this dropdown list to limit your search to just the symbols contained in a certain group of symbols.

For more information about using the Symbol Selector see the Help Topics in the Help Menu.

Adding to the Chart

To add items to the chart such as **Studies**, **Indicators**, **Highlight Bars** and **Strategies**, simply click on the chart, type the letter **A** on your keyboard, select the tab that corresponds to the item you wish to add, select the item you wish to add from the list and click the **Add** button.



Some of the Studies in this screen shot are for specific packages and may not appear in your Trade Navigator.

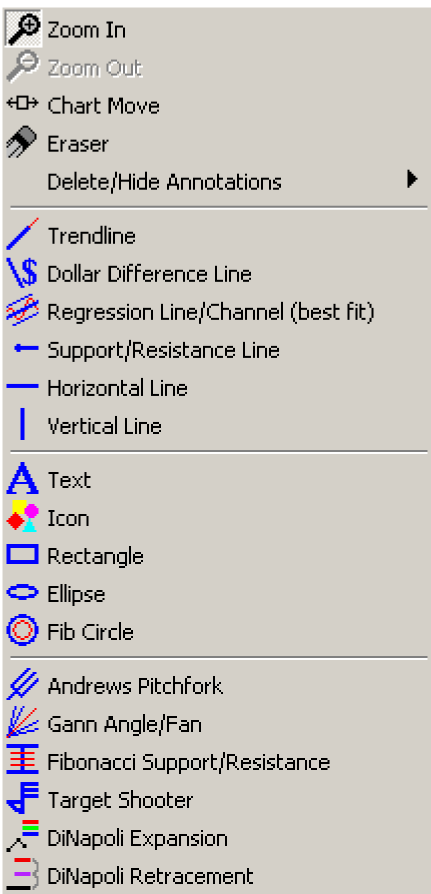
For more information about using Studies, Indicators, Highlight Bars and Strategies see the Help Topics in the Help Menu.

Drawing Tools

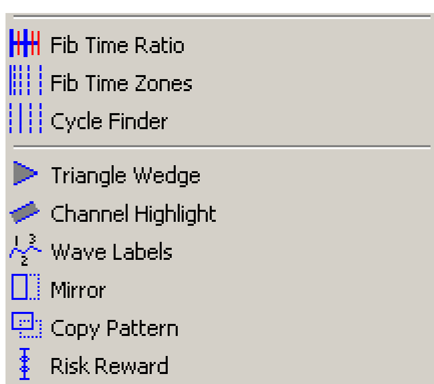
You can choose from a wide variety of Drawing Tools or notations to add to your chart.

To use the Drawing Tools simply click on the button for the tool you wish to use, then click on the area of the chart that you wish to draw on and drag the mouse to where you wish to end and release the mouse button. Some drawing tools only require a single click to draw, a few of them can be drawn using either method. The Dollar Difference Line for instance can be drawn to a point you select using the click and drag method while a single click will draw a dollar difference line from the point where you clicked to the most recent closing price.

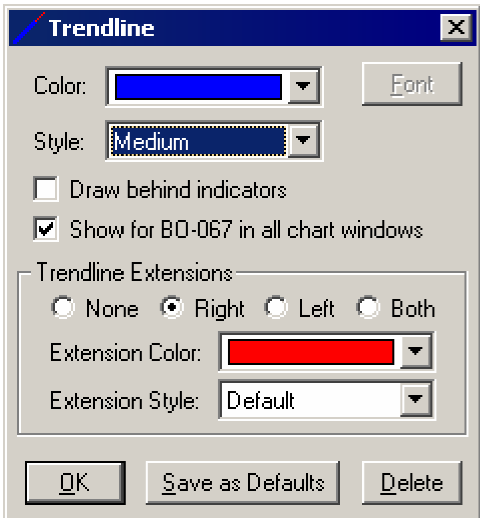
You will find the Drawing Toolbar located on the right side of the chart by default, however you can move it to a different area of the screen if you wish. You can also find the Drawing Tools under the **Drawing** menu at the top.



Some of the Drawing Tools in this screen shot are for specific packages and may not appear in your Trade Navigator.



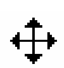
Once you have drawn on the chart with a drawing tool you can edit that notation by clicking on the notation's hotspot. This will bring up an Edit screen for that drawing tool.



The hotspot for editing a Drawing Tool notation should look like this:

You can reposition a drawing tool notation by finding the hotspot, usually at the end of the line or in the center of the notation and clicking on it and dragging.

The hotspot for repositioning a Drawing Tool notation should look like this:

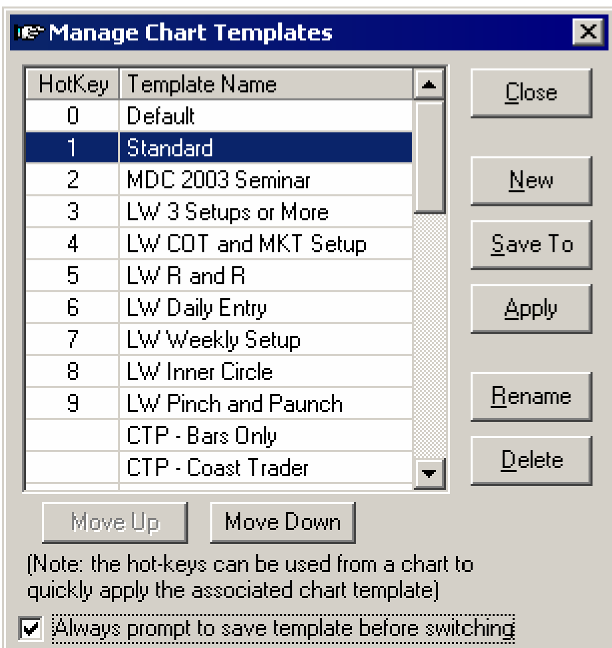


For more information about Drawing Tools see the Help Topics in the Help Menu.

Templates and Pages

Templates allow you to save the studies, indicators, highlight bars, strategies and some of the settings that you have set up on a chart. Once you have saved these settings to a template you can go back to that template with a few clicks of the mouse or with a single keystroke.

To create a Template, set the chart up the way you want it, click on the **Templates** button on the toolbar, click **<Manage chart templates>**, click the **New** button, type in a name for your template and click the **OK** button.



Some of the Templates in this screen shot are for specific packages and may not appear in your Trade Navigator.

You can access a template by clicking on the **Templates** button on the toolbar and then clicking on the name of the template in the list of templates. If the template that you wish to apply is one of the first nine templates in the list you can simply click on the chart and then type the number that corresponds to that Template.

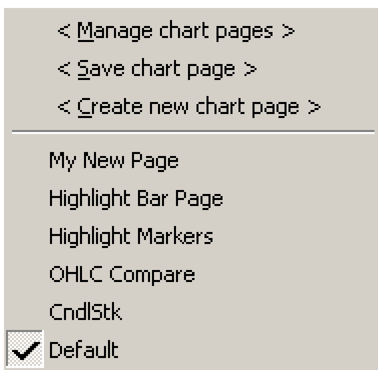
To change the order of the templates in the list, click on the **Templates** button on the toolbar, click **<Manage chart templates>**, select the template you wish to move in the list and click either the **Move Up** or the **Move Down** button to move the Template up or down in the list.

For more information about using Templates see the Help Topics in the Help Menu.

Chart Pages allow you to save multiple charts and templates and save more of the settings than you can save with a single template.

To create a Page, set the charts and templates up the way you want them, click on the **Pages** button on the toolbar, click **<Create new chart page>**, type in a name for your page and click the **Save** button.

To access the Pages that you have created simply click on the **Pages** button on the toolbar and then click on the name of the page that you wish to switch to.



All of the Pages in this screen shot were created by the user and will not appear in your Trade Navigator.

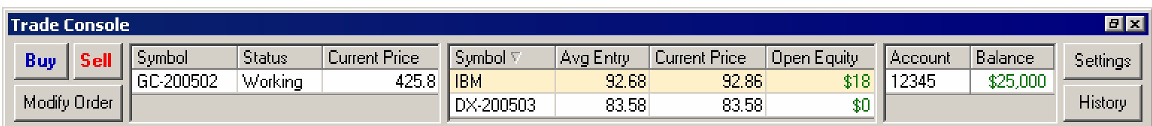
For more information about using Pages see the Help Topics in the Help Menu.

Trade Console

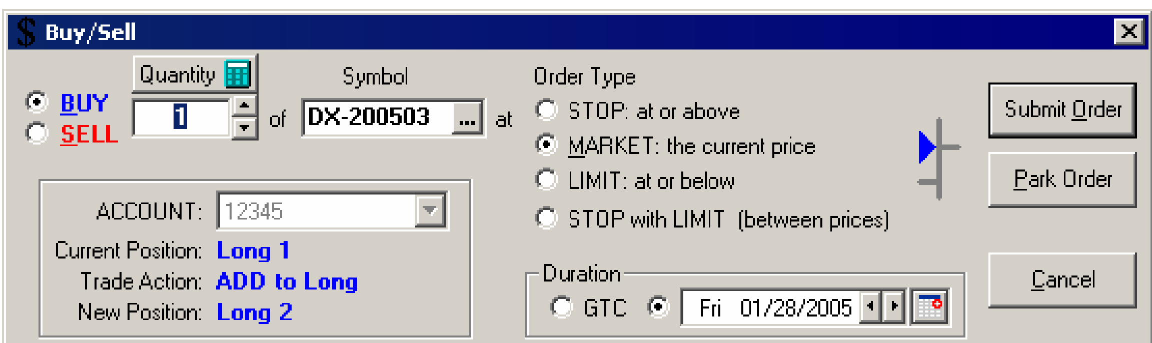
Trade Console allows you to create and track virtual trades or track your real trades. Trade Console is connected to a server which monitors simulated trades in real time. Your simulated trades are filled as soon as the price you have setup the trade for is hit.

To place a trade in Trade Console, click on the **Trade Console** button on the toolbar. If this is the first time you have opened Trade Console you can fill in the **Account Information** and then click **OK**.

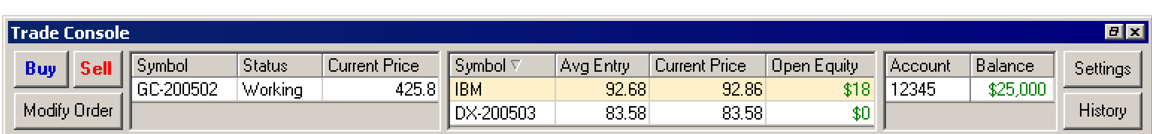
Click on the **Buy** or the **Sell** button.



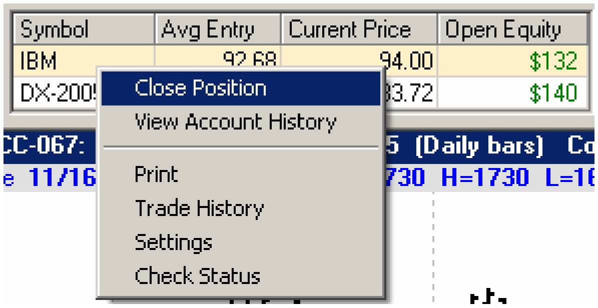
Select the Symbol, Quantity and Order Type and then click the **Submit Order** button. (*An active internet connection is required.*)



The order will be placed in the working orders until it is filled. To check to see if it has been filled, click on the **Modify Order** button and click **Check Status**.



To exit a trade in Trade Console, right-click on the trade you wish to exit from in **Trade Console** and click on **Close Position**.



Select the Quantity and Order Type and then click the **Submit Order** button.
(*An active internet connection is required*.)

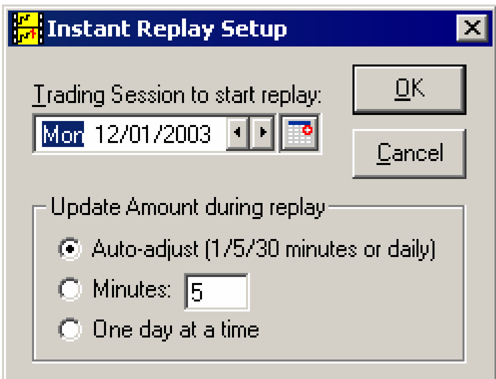
The order will be placed in the working orders until it is filled. To check to see if it has been filled, click on the **Modify Order** button and click **Check Status**.

For more information about using Trade Tracker see the Help Topics in the Help Menu.

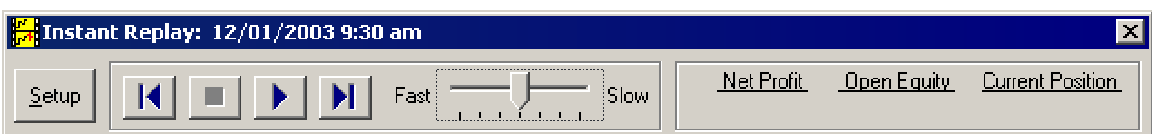
Instant Replay

Instant Replay allows you to virtually go back in time on the chart and watch the chart change to see how a market moved. In moments you can view how the market changed over days, weeks or even years. See how indicators responded and when strategies entered or exited trades.

To use the instant replay feature click on the **Instant Replay** button on your toolbar or type **Ctrl+R**.



Set the date you wish to start the replay on and click the **OK** button.



Next click the **Play** button and watch the chart as it displays the market's movements.

If you subscribe to Genesis intraday data you can view the movements of each bar for each day.

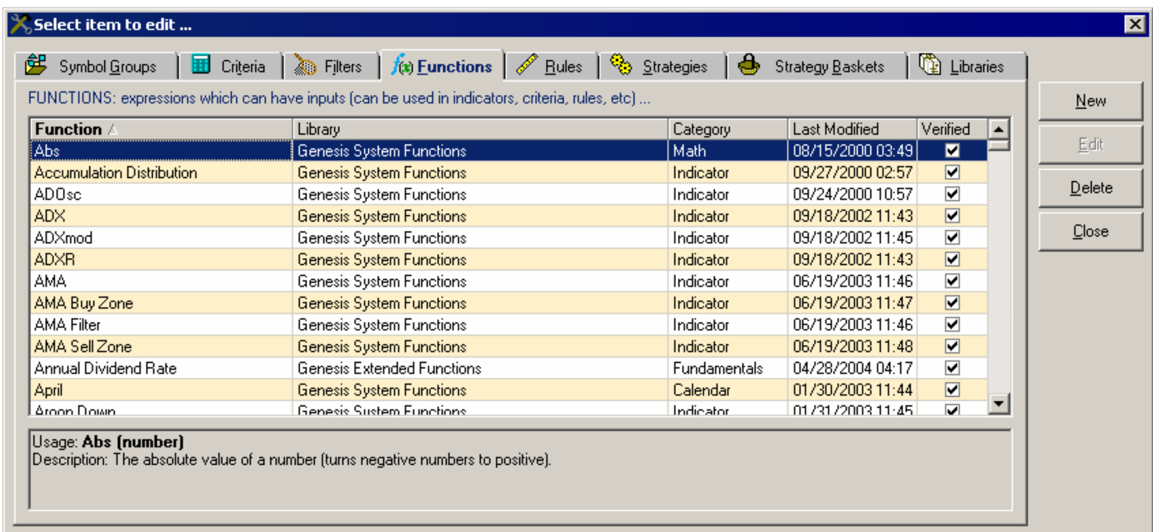
For more information about using Instant Replay see the Help Topics in the Help Menu.

Trader's Toolbox

Trader's Toolbox allows you to create and edit **Symbol Groups**, **Criteria**, **Filters**, **Functions**, **Rules**, **Strategies**, **Strategy Baskets** and **Libraries**.

When you click on the **Trader's Toolbox** button you'll be accessing some of the most powerful features in Trade Navigator.

Simply click on the **Trader's Toolbox** button, click the tab that corresponds to the feature you wish to use and either click the **New** button to start a new one or select an item from the list and click the **Edit** button to work with an existing item.

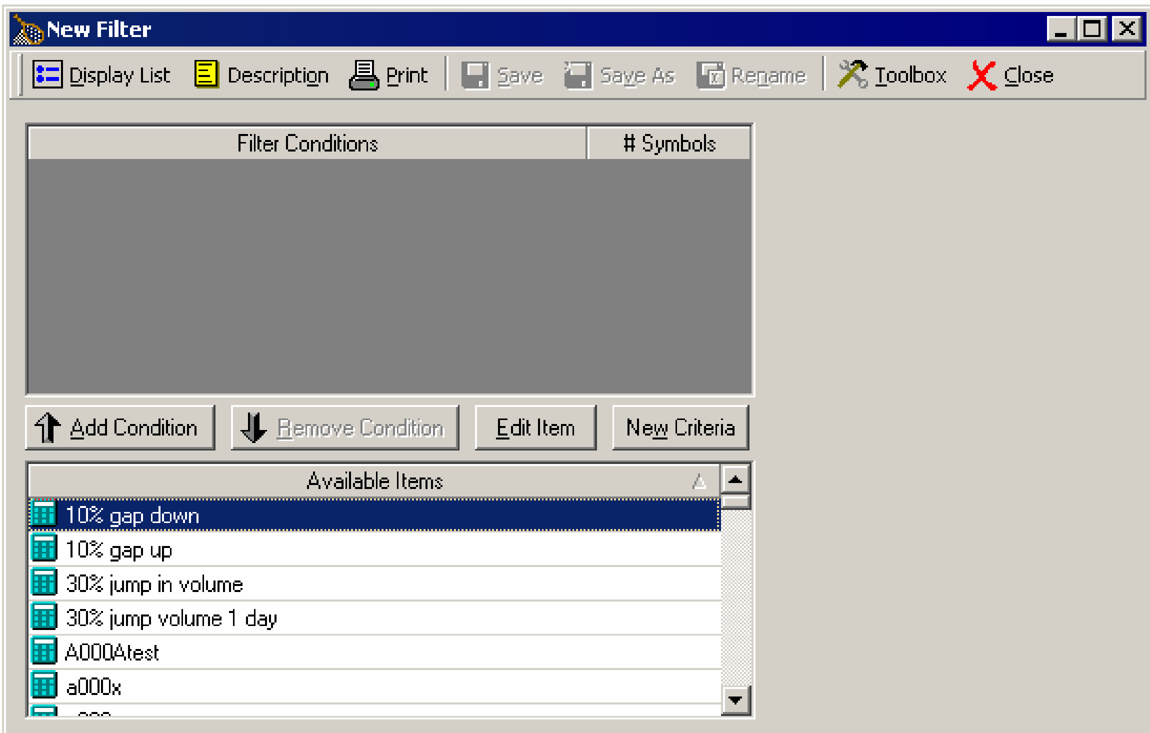


Some of the Symbol Groups in this screen shot are for specific packages and may not appear in your Trade Navigator.

For more information about using Symbol Groups, Criteria, Filters, Functions, Rules, Strategies, Strategy Baskets and Libraries see the Help Topics in the Help Menu.

Creating a Filter

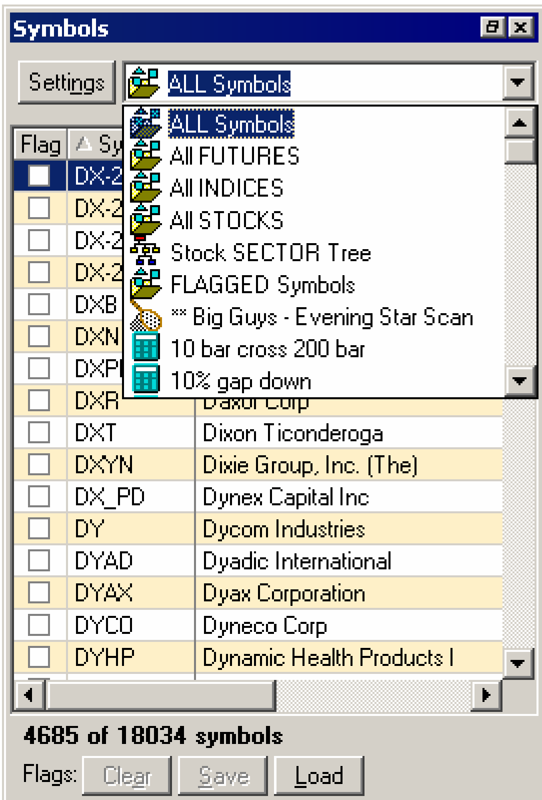
To create a Filter, open the **Trader's Toolbox** and click, the **Filters** tab and click the **New** button. The following screen will appear.



Highlight an item from the list and click the **Add Condition** button. This will set the filter to look for only those symbols that meet the criteria of the item you have selected. If you added **30% jump** in volume, only symbols that have had a recent 30% jump in volume will show up for this Filter. If you then add **Close up 3 days**, and the symbol group **Dow 30**, only symbols from the Dow 30 that have had a 30% jump in volume and have had an up close for the last 3 days will show up for this filter.

Next click the **Save** button, type in a name for the filter and click the **OK** button.

Now that you have created a filter, you can use your filter in the Symbol Grid by clicking the down arrow button to the right of the Show button on the Symbol Grid, find the Filter in the list and click on it.



Now only symbols that meet all of the criteria for your Filter will show up in the Symbol Grid.

If no symbols are displayed you may need to Recalculate Criteria by clicking on **File** in the upper left corner of the Trade Navigator screen and clicking on **Recalculate Filter Criteria**. This will take several minutes on most machines.

For more information about using Filters and Criteria see the Help Topics in the Help Menu.

We hope you have enjoyed your quick walk through using Trade Navigator.
Enjoy your charting.