



2.3 User's Guide

Blackberry

March 2010

1. Introduction:

PDATrade is a powerful application that allows you to access real-time and streaming stock information. Using PDATrade, you can stream stock quotes to your Blackberry, check the markets, look up commodities, get news and charts for any company, and much more. All data is provided in real-time, so you need just a Blackberry and an internet connection.

2. Requirements:

To run PDATrade, you will need a Blackberry. You must have an internet connection to download information to your device.

3. Installation:

a. Install via PC:

To install PDATrade on your device using your PC, follow these steps:

- i. Connect your device to your computer. Make sure it is recognized by Blackberry Device Manager. Your device will include instructions on how to establish the connection.
- ii. On your PC, go to www.pdatrade.com. Go to the Blackberry product page and click "Click here to install."
- iii. Click the Blackberry on the left, for OS 4.6 and earlier, to download the .zip file.
- iv. Follow the instructions posted below the link.

b. Install via PDA:

To install PDATrade over-the-air (OTA) directly onto your device, follow these steps:

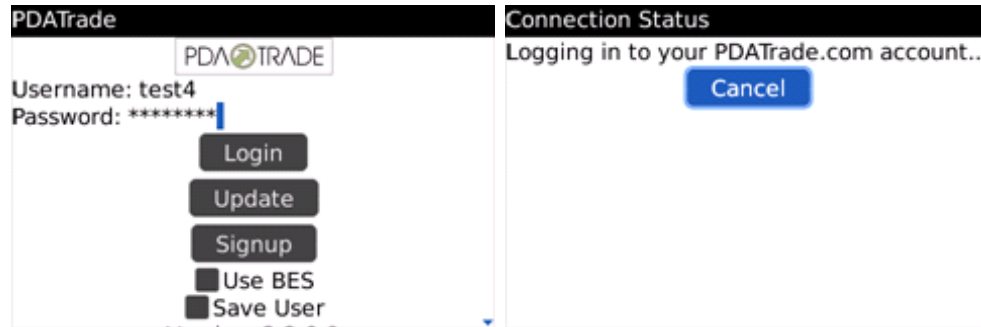
- i. On your device, navigate to www.pdatrade.com/installs.
- ii. Click Blackberry OTA Installer to begin the download.
- iii. Follow the instructions that appear on your Blackberry.

4. Working with PDATrade:

To run PDATrade, scroll to the PDATrade icon on your home screen (Version 4.5 or earlier) or in the Downloads folder (Version 4.6 and later). Select it to launch the application.



- a. To login, enter your user ID and password and click Login. The program will track your progress and let you know when a connection with our servers has been established. Click Cancel at any time to stop the process. If your corporation uses Blackberry Enterprise Server (BES), check the "Use BES" box to use it when connecting. Check the "Save User" box to store your username and password in memory for future use.



- b. To access the features of PDATrade, select a page from the list. Each will open up a new window with the feature you selected. To return to the home screen from any of these pages, choose Close on the Blackberry menu or press the Back/Escape button.



- c. Streaming: To switch between pages select a page from the Blackberry menu. You can also press "1", "2", or "3" on your keypad to choose a page. Scroll down to view any symbols that don't appear on the screen. If your Blackberry does not have a trackball, additional menu items will allow you to scroll right and left. Open the Blackberry menu to get detailed quotes, news, and charts for the highlighted symbol.

Sym	Time	Lst	Bid	Ask	Sym	Time	Lst	Bid	Ask
AAPL	10:42	95.75	95.75	95.76	AAPL	10:43	95.80	95.79	95.80
AMAT	10:42	10.06	10.06	10.07	AMAT	10:43	10.08	10.07	10.09
CEF	10:42	11.04	11.02	11.05	CEF	10:42	11.04	11.02	11.05
CIEN	10:42	0.0	6.28	6.30	CIEN	10:			6.30
DNA	10:42	82.11	82.11	82.12	DNA	10:		82.16	82.16
ERTS	10:42	17.04	17.04	17.04	ERTS	10:		17.04	17.04
GD	10:42	56.15	56.15	56.18	GD	10:		56.20	56.20
GE	10:42	11.69	11.69	11.71	GE	10:		11.72	11.72
GENR	10:24	.42	.41	.51	GENR	10:		.49	.49
GPRO	10:42	46.36	46.34	46.38	GPRO	10:		46.38	46.38



- d. Market Stats: When you open the Market Stats window, the latest market statistics will automatically load. To update the window, select Refresh from the Blackberry menu. The time of the last refresh will appear at the top of the screen.

Market Stats - 11:48 AM			
Index	Last	Change	
Dow Jones	10378.92	-28.04	
Nasdaq	2189.14	-8.71	
S&P 500	1103.81	-5.49	
Internals	NYSE	NASDAQ	AMEX
ADV:	899	845	169
DEC:	2017	1683	243
UNCH:	122	117	66

- e. Market Movers: Select an index and a category to display Market Movers. The top 5 stocks in the selected category of the selected index will appear. Scroll right to view all the statistics. Select Refresh to refresh the current index and category.

Market Movers					Market Movers				
Exchange: NYSE					Exchange: NYSE				
Type: Top \$ Gainers					Type: Top \$ Gainers				
Submit Cancel					Submit Cancel				
Last	Change	Volume	% Change	Trades	Symbol	Last	Change	Volume	% Change
454.70	+24.77	17300	+5.76%	16	QQQQ	29.89	+.73	45435907	+2.3
276.19	+11.69	2200	+4.41%	22	MSFT	19.53	+.49	27550278	+2.5
262.15	+11.15	6700	+4.44%	61	INTC	15.13	+.54	26804217	+3.1
295.10	+8.99	15089	+3.14%	13	CSCO	16.92	+.08	23766061	+4.1
122.80	+7.00	561334	+6.04%	15	ORCL	16.75	+.30	14624920	+1.8

Available indices and categories:

- i. Indices:
 1. NYSE
 2. AMEX
 3. NASDAQ
- ii. Categories:
 1. Top \$ Gainers
 2. Top \$ Losers
 3. Top % Gainers
 4. Top % Losers
 5. Most Actives
 6. Most Trades

- f. Quote, DJ Indices, and S&P Indices: Enter in a symbol, and then select Get Quote or Get Index to get the stats for the stock or index you entered. The program will display a real-time quote for that stock or index.

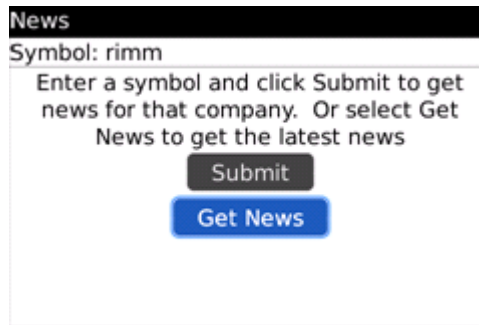
The image shows three screenshots of a financial application interface. The first screenshot is the 'Quote' window for 'RESEARCH IN MOTION LTD' (Symbol: rimm). It displays real-time data: Last: 41.42, Chg: -1.41, % Chg: -3.29%, Bid: 41.41, Ask: 41.42, Time: 3:50, Vol: 19583596, Open: 43.0, PE: 20.014, and 52-Week Range: 40.13 - 42.83. A 'Get Quote' menu is overlaid on the bottom left. The second screenshot is the 'DJ Indices' window for 'DJ INDUSTR AVERAGE' (Symbol: dji). It displays: Last: 8558.80, Chg: +182.55, % Chg: +2.17%, Day Range: 8118.5 - 8599.34, and 52-Week Range: 7449.38 - 14198.1. The third screenshot is the 'CME/S&P Indices' window for 'S&P 500' (Symbol: in.x). It displays: Last: 867.04, Chg: -20.84, % Chg: -2.34%, Day Range: 857.09 - 887.37, and 52-Week Range: 818.16E7. A 'Get Index' menu is overlaid on the bottom left.

- g. Dow Components: When you open the Dow Components window, real-time stats for the 30 Dow Jones companies will automatically load. Select Refresh from the Blackberry menu to update the window. Scroll down to view any symbols that don't appear on the screen. If your Blackberry does not have a trackball, additional menu items will allow you to scroll right and left. Scroll to a symbol and open the Blackberry menu to access detailed quotes, news, and charts for that symbol.

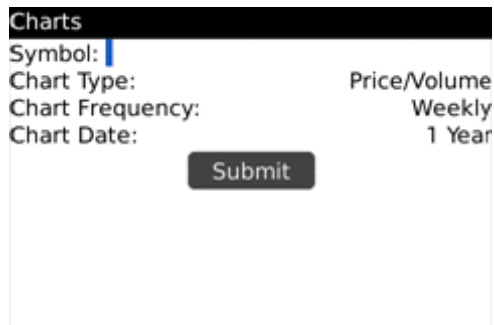
Dow Components					Dow Components				
Symbol	Last	Change	% Change	Volume	Symbol	Last	Change	% Change	Volume
AA	9.18	+0.28	+3.14%	150480	DD	28.71	+1.25	+4.55%	452900
AXP	24.90	+3.93	+18.74%	476537	DIS	20.20	+0.57	+2.90%	752660
BA	38.73	+0.79	+2.10%	339484	GE	12.29	+0.40	+3.45%	454960
BAC	9.34	+0.52	+5.89%	265027	GM	1.70	+0.08	+4.93%	142578
C	3.21	+0.00	+0.31%	159571	HD	26.6			130885
CAT	33.95	+1.50	+4.62%	802999	HPQ	35.5			734576
CVX	66.92	+1.38	+2.12%	605107	IBM	100.			460937
DD	28.71	+1.25	+4.55%	452900	INTC	15.6			333516
DIS	20.20	+0.57	+2.90%	752660	JNJ	51.0			576841

An 'HPQ Details' menu is overlaid on the HPQ row, showing options: HPQ News, HPQ Charts, Refresh, and Full Menu.

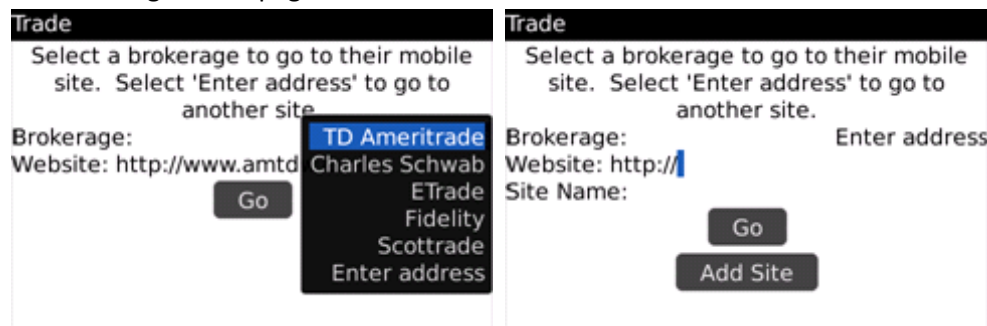
- h. News: Enter a stock symbol for which you want the latest news on, and click Submit to search for the news items for that stock. Click Get News to get the latest general news. A Blackberry browser window will open up with the news you requested.



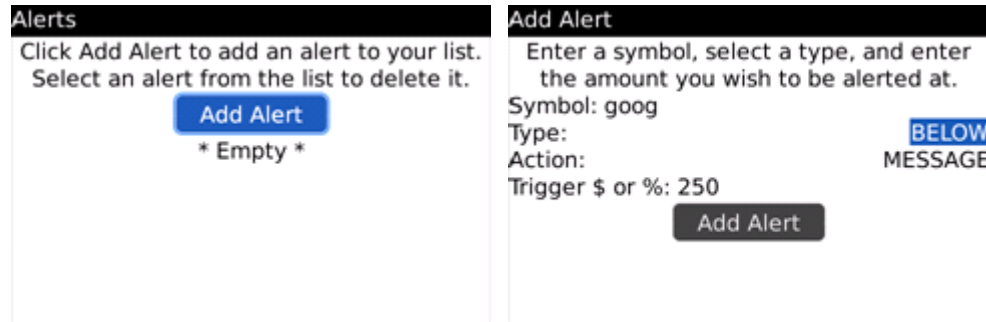
- i. Charts: Type in the stock for which you want charts. Select the chart type, frequency and time period, and click Get Charts to load the chart(s). A Blackberry browser window will open up with the chart(s) you requested.



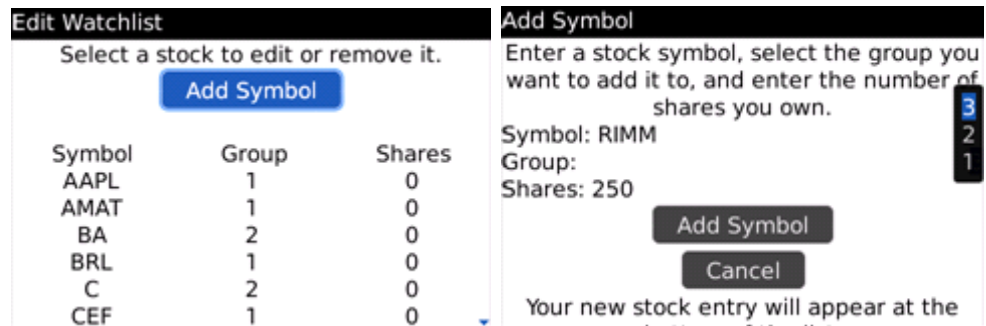
- j. Trade: Select a brokerage, then click Go to access their mobile web site. If your brokerage isn't listed, simply go to "Enter address" to type in the web address of your brokerage. Make sure to keep the "http://" at the beginning of the address. To save the site you entered, click "Add Site". A Blackberry browser window will open up with the brokerage's web page.



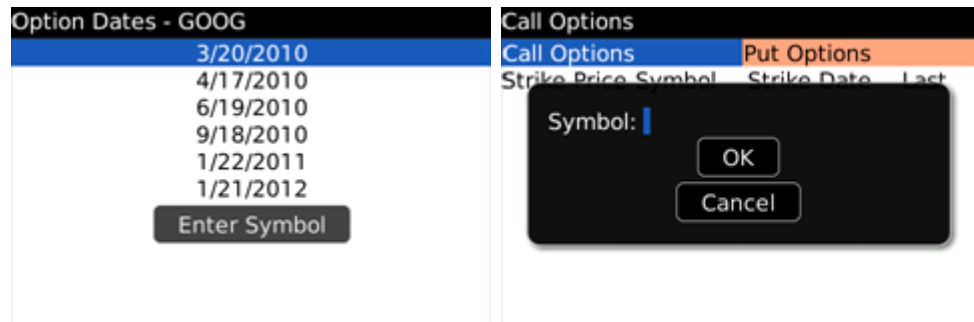
- k. Blackberry Alerts: These are localized alerts that notify you of stock prices while you are logged in to PDATrade on your Blackberry. Click Add Alert to add an alert. Enter a stock symbol, and then choose to be notified via message or handset vibration whether your stock has gone above or below a price threshold, or has changed by a certain percent. To delete an alert, click on it and choose Delete.



- l. Edit Watchlist: To add a symbol, click Add Symbol. Enter a stock symbol, the group you want to place it in, and the number of shares you have, and click "Add" to add it to your list. You can have more than 25 stocks in each group. To remove or edit a symbol, scroll to it on the list and click it. If your device has a trackball, you will be asked whether you want to remove or edit the stock. Otherwise, choose from the pop-up menu that appears. If you choose to edit it, the Add Symbol window will appear with the current information for your symbol filled in. You will be asked to confirm any changes you made when you close the Watch List Editor. If you save your changes, you will have to re-login to complete the update.



- m. Options: To get an option, enter a symbol in the popup box. Select a date to view options for that strike date. Switch between call options and put options by clicking the tabs at the top of the screen. You can sort the options through the Blackberry menu. Choose "In The Money Options" to highlight options that are currently in the money.



- n. Update: Clicking this will open a webpage in the Blackberry browser that will check if you have the latest version of PDATrade. If you don't, it will display a link to download the latest version. Click it to install the updated program. You will have to reboot your device to complete the upgrade.



- o. Portfolio: View your current holdings on this page. Scroll right to view all information for each holding. Total values are displayed at the bottom of the page. Choose Add Item to add a stock to the list, or Remove Item to remove the selected item. You can add multiple holdings of the same symbol.



- p. Signup: Fill out the form to create a PDATrade account. Make sure you read the terms and conditions posted here and on our website, which you can find by logging in to the website. You will receive an e-mail with your temporary password after completing the form. Be sure to check your spam folder if you do not receive the e-mail.

Account Signup

User Info

Username: |
E-mail:
Re-enter E-mail:

Credit Card Info

CC Type: Visa
CC Number:
CVV: Exp Month: 01 Year: 2010

Billing Address

Cardmember:
Billing Address:

5. Troubleshooting:

- a. Unable to connect:

Make sure your internet connection is working. PDATrade requires an internet connection in order to transmit data. To verify that you have internet access, open up a web browser and navigate to a known web site such as MSN or Google. Ensure that you are not viewing a cached page by refreshing the browser. If you cannot get a connection, consult your device manual.

You may have to alter a few settings on your Blackberry in order to allow a connection to PDATrade. The settings are as follows:

- i. Go to Options, followed by Advanced Options, then TCP. You may have to go to Settings first to get Options. Check the APN and make sure it is an address corresponding to your carrier (T-Mobile will be as Voicestream). If this field is blank, please contact your carrier to get the APN for your service.
- ii. Go back out to the Options menu, and go to Security Options, then TLS. Make sure TLS Default is set to Handheld. If it isn't, click and change it.
- iii. Go out of the TLS menu (remember to save), and go up to Firewall. If the firewall isn't disabled, disable it.
- iv. Leave the Firewall menu, and scroll up to Application Permissions. See if the PDATrade application is there. If so, click it and go to Edit Permissions.
 1. If the Connections option isn't set to Custom, set this by clicking it, scrolling to Change Option, and changing it to Custom. Then, expand Connections by clicking it and selecting Expand. The USB and Bluetooth connections should be set to Allow, and the Phone and Carrier Internet options should be set to Prompt.
 2. If the Interactions option isn't set to Custom, set this by clicking it, scrolling to Change Option, and changing it to Custom. Then, expand Interactions by clicking it and selecting Expand. The Interprocess Communication and Theme Data options should be set to Allow, while the Keystroke Injection and Browser Filters should be set to Deny.

3. Make sure the User Data option is set to Allow. If it isn't, change it by clicking it and scrolling to Change Option.
- b. Connection dropped:
If you lose your connection to PDATrade, it is likely due to an intermittent internet connection. Check and make sure that your wireless signal is adequate for consistent internet use. Note that if you are roaming on your cellular network you may not have a good connection.
 - c. Unable to stream data:
Make sure you signed up for streaming quotes. Log on to your account at www.pdatrade.com and view your entitlements. If RT Streaming isn't enabled, you will not be able to stream stocks to your device.
 - d. Technical support:
If you are still having trouble please contact us at (800) 300-3630 or e-mail us at info@pdatrade.com. We will do our best to assist you.