

TradeStation 9.5 to 10

Transition Guide



TradeStation 9.5 to 10 Transition Guide

Frequently Asked Questions (FAQ)

| | |
|---|----|
| What platform terminology has changed? | 2 |
| How do I move my workspaces? | 2 |
| Where are my files stored? | 3 |
| Where are my TradingApps, Order Bar, and Position Graph Bar? | 3 |
| How do the new toolbars work? | 4 |
| What is TradeStation Today? | 5 |
| How do I apply an indicator to a chart and enable an alert? | 6 |
| How do I enable and disable non-strategy orders and position arrows in a chart? | 7 |
| How do I view a Strategy Performance Report? | 8 |
| How do I select different chart data intervals? | 9 |
| Where is the latest list of platform updates? | 11 |
| Do I need to install platform updates myself? | 12 |
| How do I find more help and videos? | 12 |

Welcome to TradeStation 10! Browse these frequently asked questions to learn more about our updated platform terminology, how to move your workspaces, where your files are now stored, and where all the key platform features are now located. TradeStation 10 provides significant enhancements to the platform's appearance and functionality, and we hope it will exceed your expectations.

What platform terminology has changed?

Here is a guide to the terminology updates from TradeStation 9.5 to 10:

| TradeStation 9.5 Term | TradeStation 10 Term |
|--|----------------------|
| Analysis Technique | Study |
| Analysis Group | Study Group |
| Order Bar | Trade Bar |
| Insert (as in Insert Analysis Technique) | Add Study |
| Manage (as in Manage Analysis Technique) | Edit Study |
| Delete | Remove |
| Format (as in Format Symbol) | Customize Symbol |
| Format (as in Format Analysis Technique) | Edit Study |
| Data Interval | Timeframe |


How do I move my workspaces?

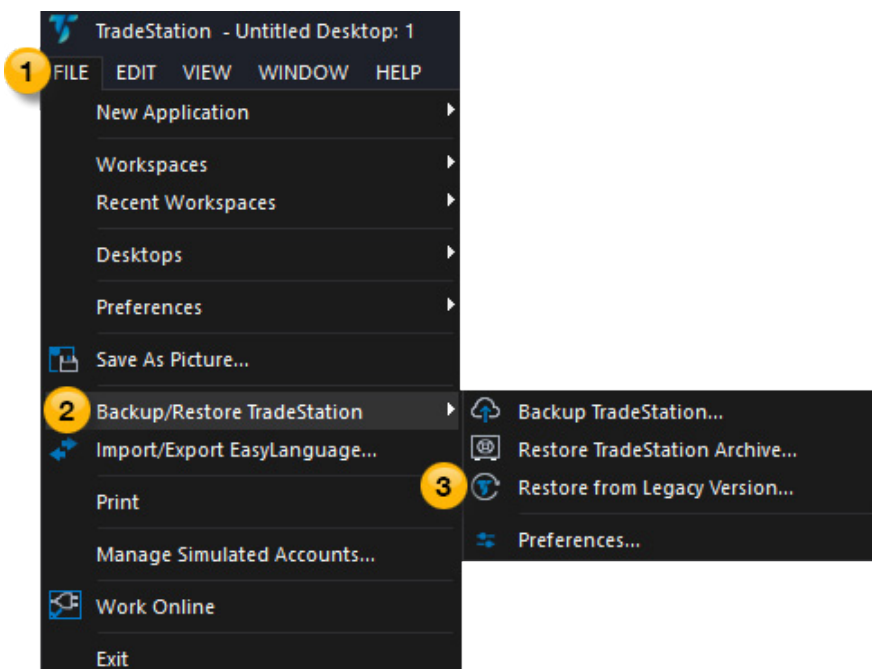
The first time you log in to TradeStation 10, if you have a previous version of TradeStation installed, you will be prompted to import your work using a step-by-step wizard.

If you choose not to import your work when you first log in, you can import your files later.

To import your work:

1. Click **File** from the menu bar along the top of the platform.
2. Select **Backup/Restore TradeStation** from the menu.
3. Select **Restore from Legacy Version...** to open the Import Wizard.

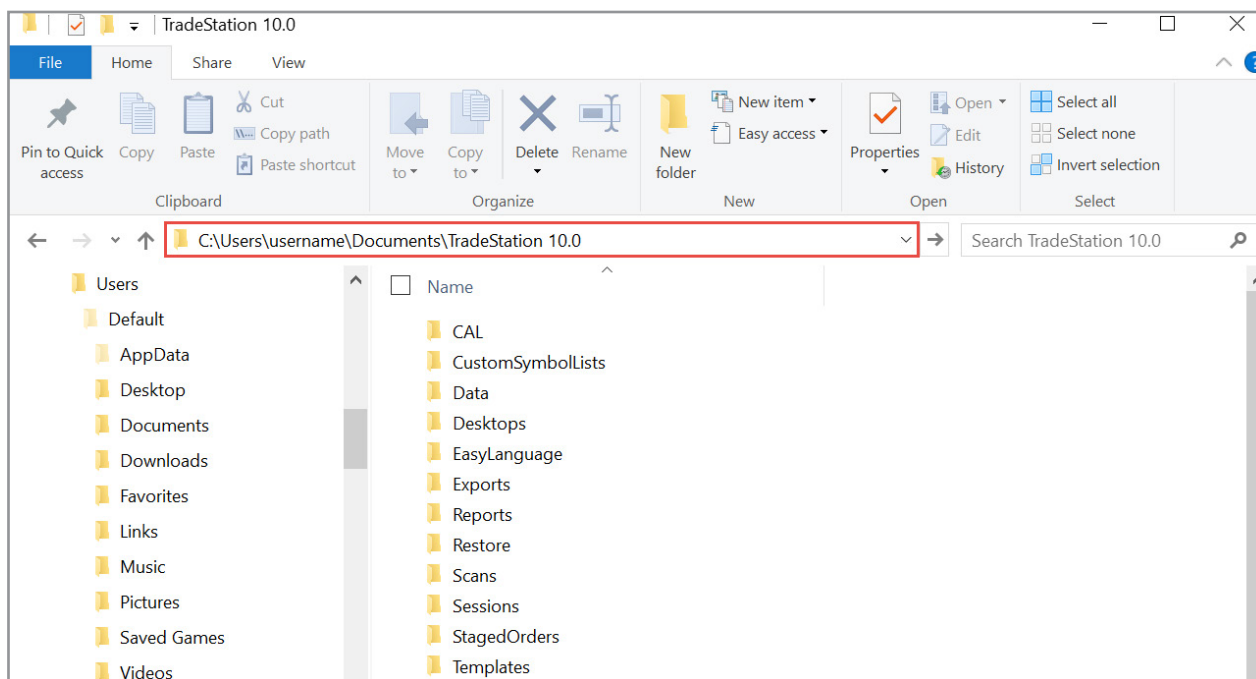
 **Note:** You will not be able to use workspaces that are created or modified in TradeStation 10 in previous versions of TradeStation.



Where are my files stored?

To comply with Microsoft Windows security best practices, TradeStation files are now stored in new locations. The files that you create, for example your workspaces, have been moved from the Program Files (x86) directory to the User's Documents directory.

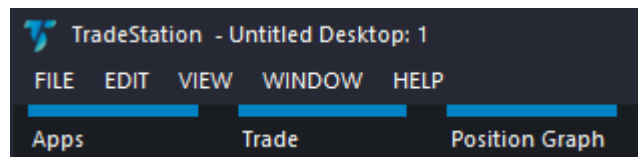
The new path will be **C:\Users\[UserName]\Documents\TradeStation 10.0**, where [UserName] is your Windows user name. Now, even if your platform is uninstalled, the files you have created will remain in this location.



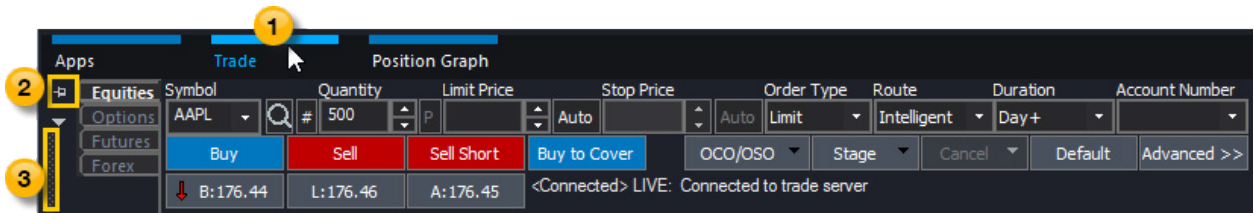
Where are my TradingApps, Order Bar, and Position Graph Bar?

In TradeStation 10, the Apps (TradingApp Launcher), Trade (Trade Bar, previously called Order Bar), and Position Graph bars are more customizable. By default, they appear along the top of the desktop.

You can hover your mouse over an application to expand it, or click the pushpin icon to dock it to your window's desktop.



To customize the way your bars display:



1. Hover over the docked bar to make it expand. If you move off the docked bar, it will collapse.
2. Pin ⇨ the docked bar to expand it, even when you move the mouse off the bar.
3. Re-dock the bar and move it around the desktop by grabbing this section.

For more information about displaying, hiding, and moving bar panels, select **Help** along the top of the platform, then select **Get Help > Platform Trading** from the menu. From the Index tab, type the keywords **Bar Panels** to find the topic.

How do the new toolbars work?

You can access all window-specific functionality from the new in-application toolbars and their matching right-click shortcut menus.

Window-specific toolbars display at the top of an application window, such as Chart Analysis, and contain buttons that are only applicable to that specific window type.



The right-click shortcut menus match their application toolbars.

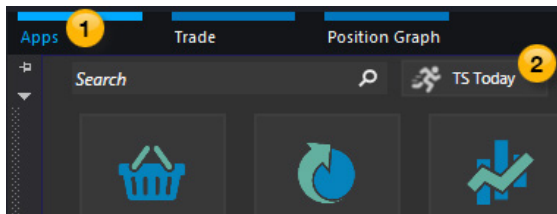


In addition to displaying the default in-application toolbars, you can create your own custom toolbars for an application window. For more information on creating a customized toolbar, you can bring up the TradeStation 10 software and go to **Help** along the top of the platform, then select **Get Help > Platform Trading** in the menu. Under the Index tab, type the keyword **Toolbars** and select the subtitle called **Customizing**.

What is TradeStation Today?

TradeStation Today is an all-in-one dashboard featuring up-to-date educational resources including market videos, events, and workspaces. Recommended workspaces created by TradeStation and market gurus extend the power of the platform.

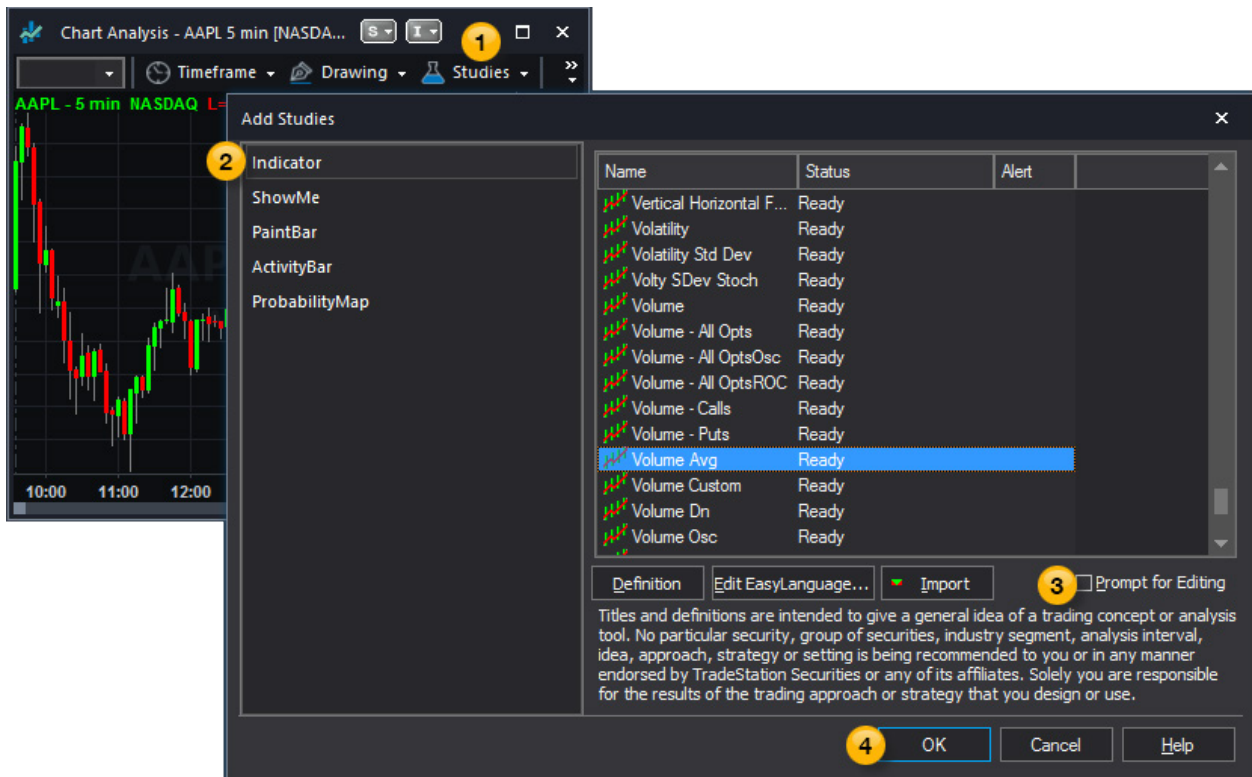
To launch TradeStation Today:



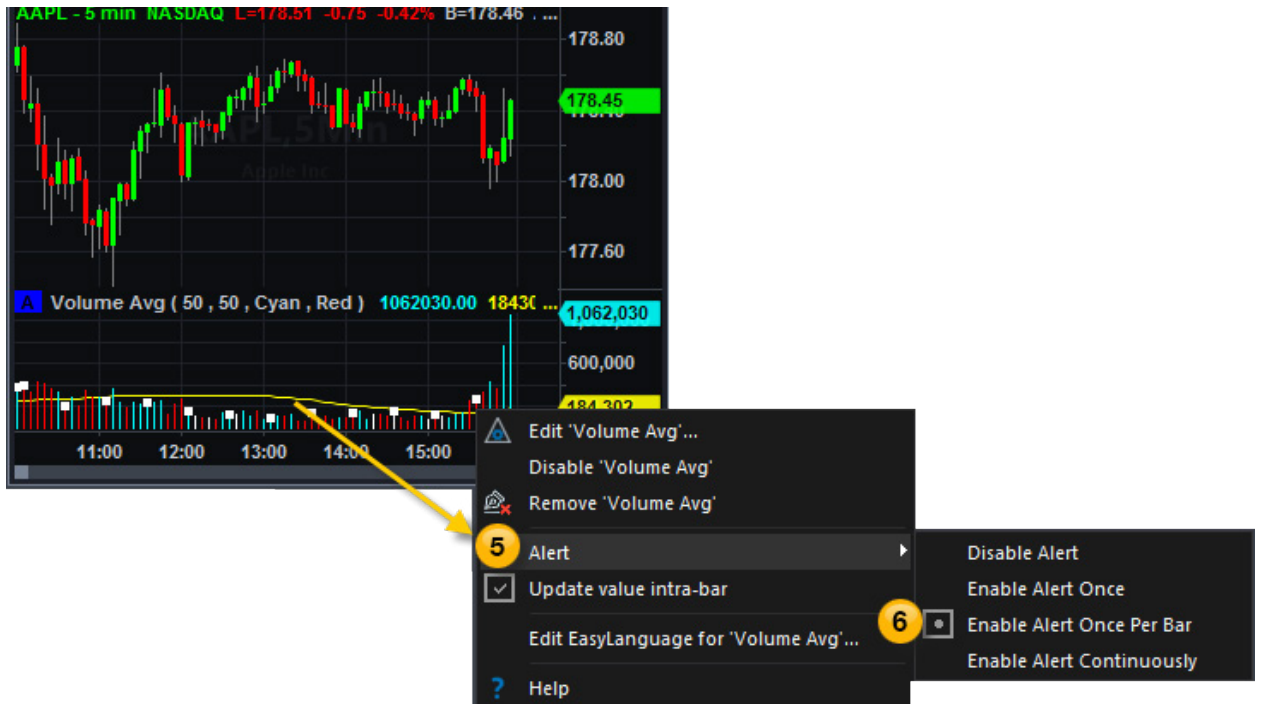
1. Access the TradingApp Launcher by clicking the **Apps** tab (at the top edge of your desktop) or using the **View > TradingApp Launcher** menu sequence.
2. Click the **TS Today** icon (next to Search) on the TradingApp Launcher title bar.

How do I apply an indicator to a chart and enable an alert?


In TradeStation 10, to apply an indicator to a chart:



1. Along the top of the chart, select **Studies**, and then select **Add Study** from the menu. You may also right-click on the background of a chart and select **Studies** from the menu.
2. Choose the Indicator tab and select an indicator.
3. To edit the indicator before you insert it, select the **Prompt for Editing** checkbox. Otherwise, clear the checkbox to apply the indicator using its default values.
4. Click **OK** to apply the indicator.



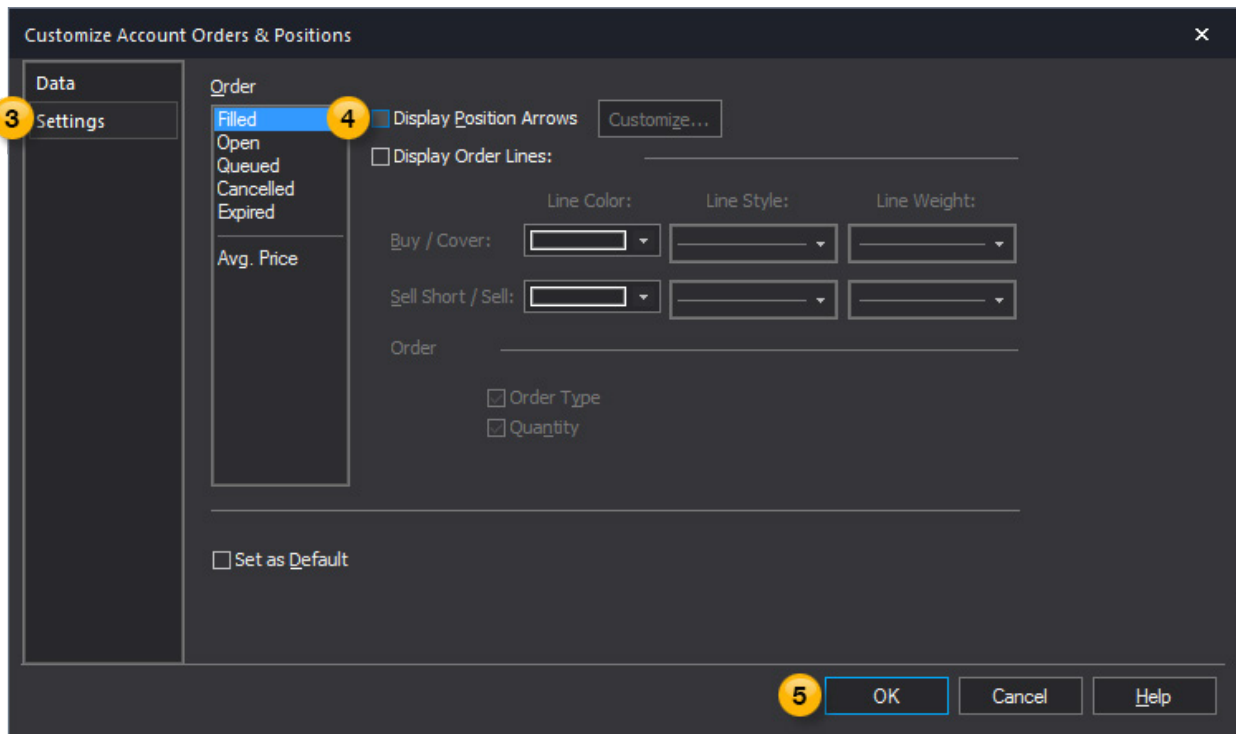
5. In order to enable alerts, right-click the study and select **Alert** from the shortcut menu.
6. Select the **Enable Alert** setting for the type of messaging you want to use.

 **Note:** The drawing objects that support alerts are Andrews Pitchfork, Fibonacci Tools (except the Price Retracement Calculator and Speed Resistance Arcs), Gann Fann, Horizontal Line, Vertical Line, Regression Channel, Time Cycle, and Trendline.

How do I enable and disable non-strategy orders and position arrows in a chart?

By default, TradeStation will automatically display filled positions arrows in a chart. In order to disable these filled position arrows, follow these steps:

1. Right-click on the background of a chart analysis window.
2. Select the **Settings > Account Orders & Positions** menu item. The Customize Account Orders & Positions dialog opens.



3. Select the **Settings** tab.
4. Remove the check mark from the **Display Position Arrows** box to disable position arrows. Add the check mark to enable position arrows.
5. Click **OK** to save the changes.

For more information on account orders and positions, select **Help** along the top of the platform, then select **Get Help > Platform Trading** from the menu. From the Index tab, type the keywords, **Account Orders and Positions**.

How do I view a Strategy Performance Report?

After placing entry and exit strategies on the chart, select **Data** along the top of the chart, then select **Strategy Performance Report** from the menu.



How do I select different chart data intervals?

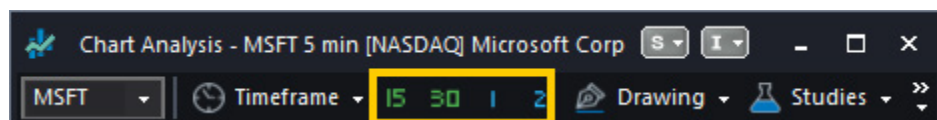
A timeframe, or data interval, represents the amount of price action within a bar (from the open to the close) and is expressed either in terms of time (1 minute, 30 minute, daily, etc.) or trading activity (tick count or volume). For example, in a daily chart, each bar interval represents the price action of one day – typically, the bar opens in the morning with the beginning of the trading session and closes at the end of the trading session in the afternoon, and so on for each bar. However, you can use any interval for your chart, including non-time-based intervals. There are three types of data intervals: time-based, tick-based, and volume-based.

In TradeStation 10, to change a timeframe (data interval):

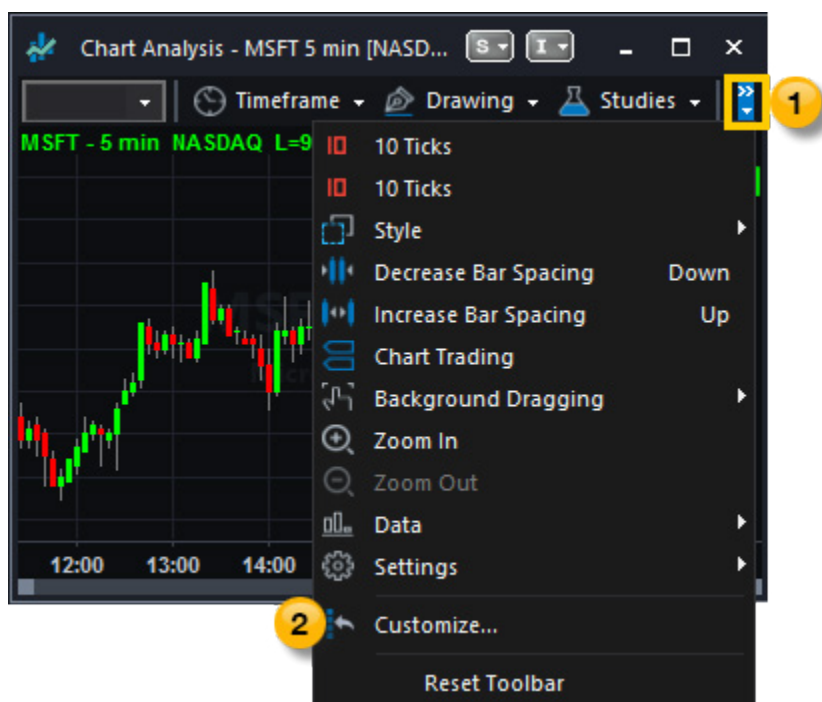


1. Along the top of the chart, select **Timeframe**, and then select the interval for the specified bar or chart type.
2. Or, type the interval keyword (i.e., 5 min, 10 min, daily, etc.) and press **Enter** (the interval appears in the toolbar's command line). By default, intra-day (time) is displayed when a chart is created.

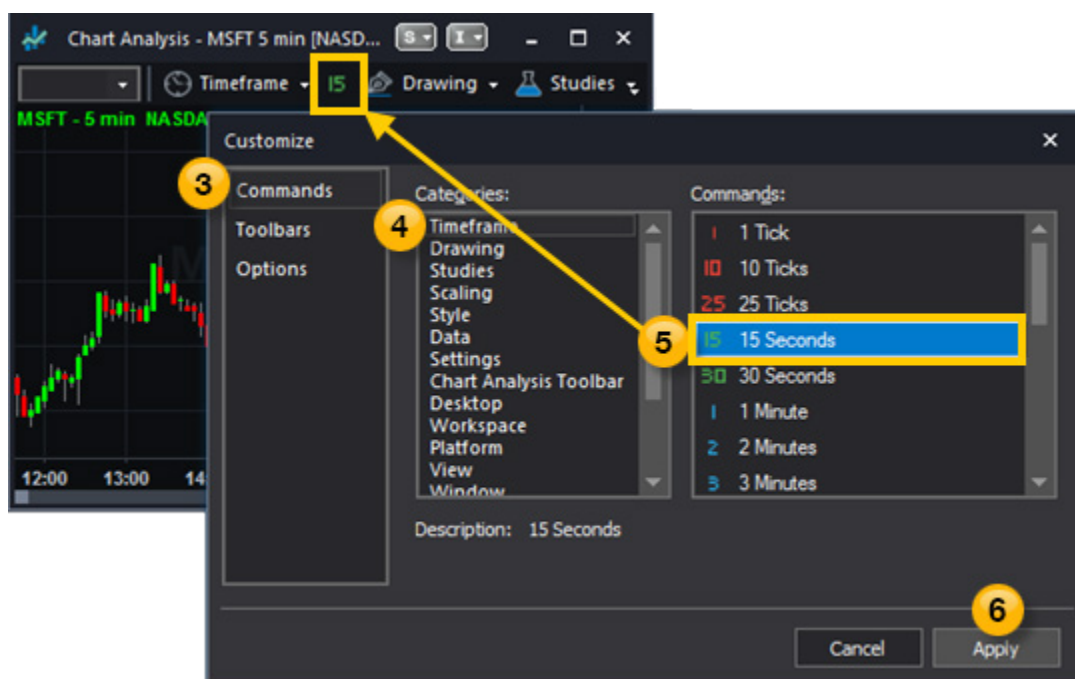
New in TradeStation 10, you can add your own Timeframe buttons to your toolbar, so that you can quickly select your preferred timeframes.



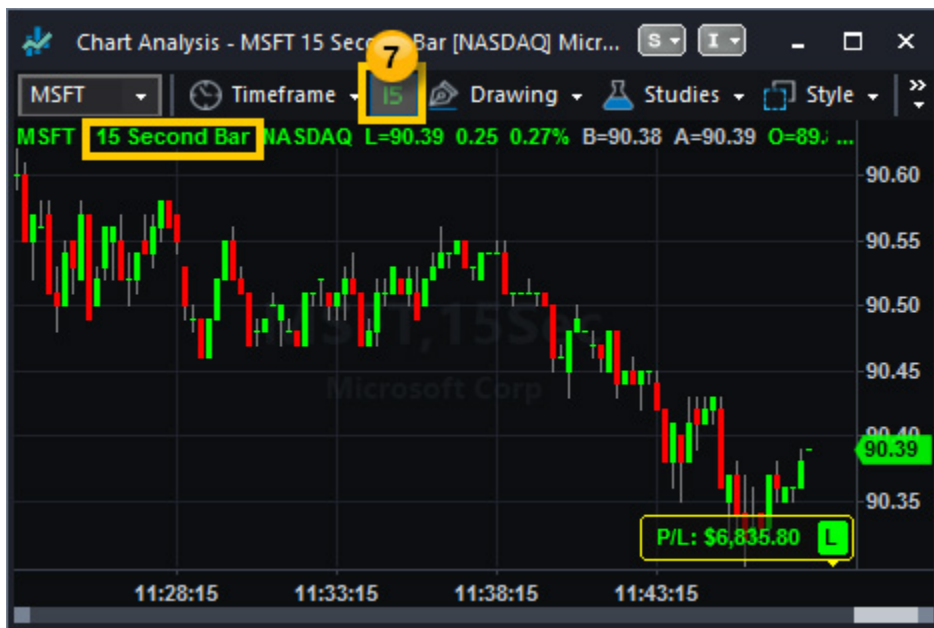
In TradeStation 10, to add a Timeframe button to your toolbar:



1. Along the top of a Chart Analysis or RadarScreen® window, select **Toolbar Options** (the down-arrow on the far right of the toolbar).
2. Select **Customize** from the drop-down list. The Customize dialog appears.



3. Select the **Commands** tab.
4. Select the **Timeframe** category.
5. From the Commands list, click and drag the desired Timeframe button into the toolbar.
6. Click the **Apply** button.



7. Click the Timeframe button you have added to the toolbar to apply the new timeframe.

For more information on intervals, interval/chart types and range, you can bring up the TradeStation 10 software and go to **Help** along the top of the platform, then select **Get Help > Platform Trading** in the menu. Under the Index tab, type the keyword **Timeframe** and select the topic called **Timeframe (see Data Interval)**.

Where is the latest list of platform updates?

The latest “What’s New” is available in TradeStation Today.

See “What is TradeStation Today?” above for more information on TradeStation Today.

Do I need to install platform updates myself?

Not anymore. Each time you log in, TradeStation 10 automatically checks to see if there's a newer version of the software available – so you don't have to. You can trade confidently knowing that you always have the platform's latest features and upgrades. We've also improved installation speeds for each update.

How do I find more help and videos?

Jump start your trading on the latest TradeStation with the new platform resource center, where you'll find links to the installation and upgrade guide, weekly live Getting Started demonstrations, FAQs on transitioning to the new platform, how-to video TradeBites, in-platform help, and our in-depth Learning TradeStation series.

⇒ Visit the new platform resource center online:

<https://www.tradestation.com/university/learning/desktop-resources>

IMPORTANT INFORMATION

No offer or solicitation to buy or sell securities, securities derivatives or futures products of any kind, or any type of trading or investment advice, recommendation or strategy, is made, given or in any manner endorsed by any TradeStation affiliate. Past performance, whether actual or indicated by historical tests of strategies, is no guarantee of future performance or success. Active trading is generally not appropriate for someone with limited resources, limited investment or trading experience, or low risk tolerance. Please visit our website www.tradestation.com or www.tradestation-international.com for relevant risk disclosures. Equities, equities options, and commodity futures products and services are offered by TradeStation Securities, Inc. (Member NYSE, FINRA, CME and SIPC).

Options trading is not suitable for all investors. Your account application to trade options will be considered and approved or disapproved based on all relevant factors, including your trading experience. View the document titled Characteristics and Risks of Standardized Options. Before trading any asset class, customers must read the relevant risk disclosure statements on our Important Information page. System access and trade placement and execution may be delayed or fail due to market volatility and volume, quote delays, system and software errors, Internet traffic, outages and other factors.