WebTrader

User guide

BigBank

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April 21, 2021

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Overview

WebTrader, BigBank's online brokerage platform, allows you to easily and quickly access and manage your investment accounts. You can review market research and your account details, transfer funds, place trades, rebalance your portfolio, and more. Use this guide to learn how to perform common tasks.

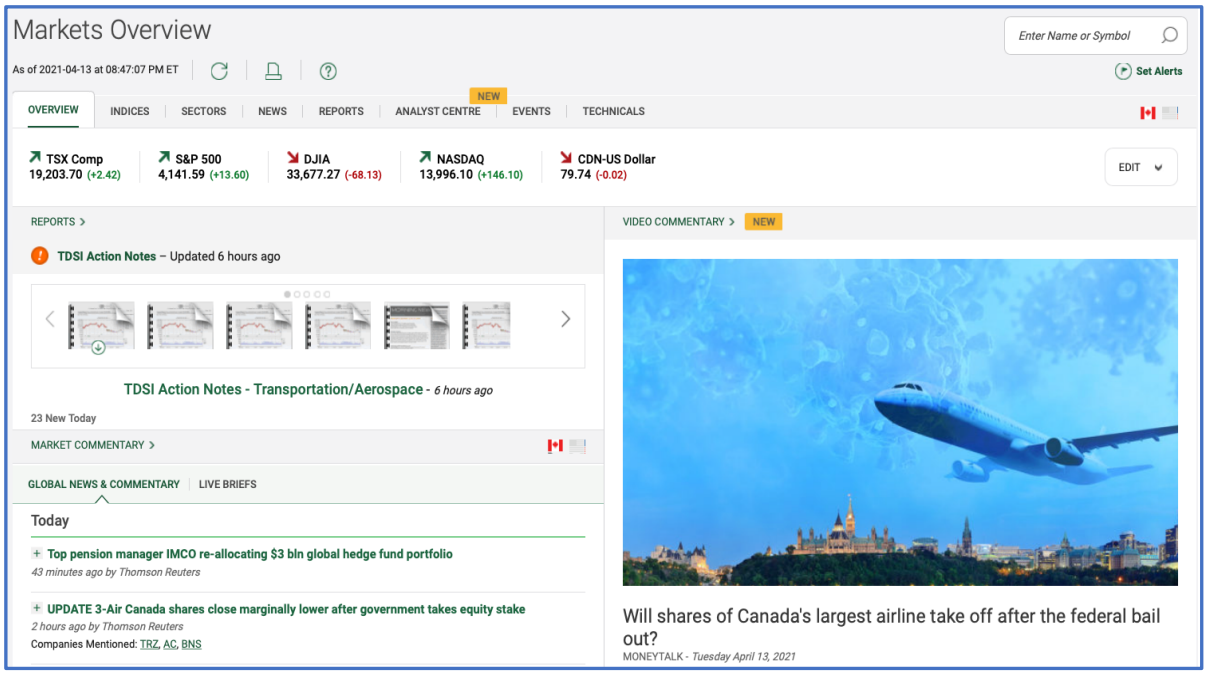
Placing a trade

The following procedures will help you place a trade using WebTrader.

Researching historical stock data

Before buying or selling a stock, you can research the stock using the **Research** tab.

1. On the **Dashboard**, click the **Research** tab. A **List** pane appears.
2. In the **List** pane, under the **Investments** category, click **Stocks**. A new page opens with stock market information.



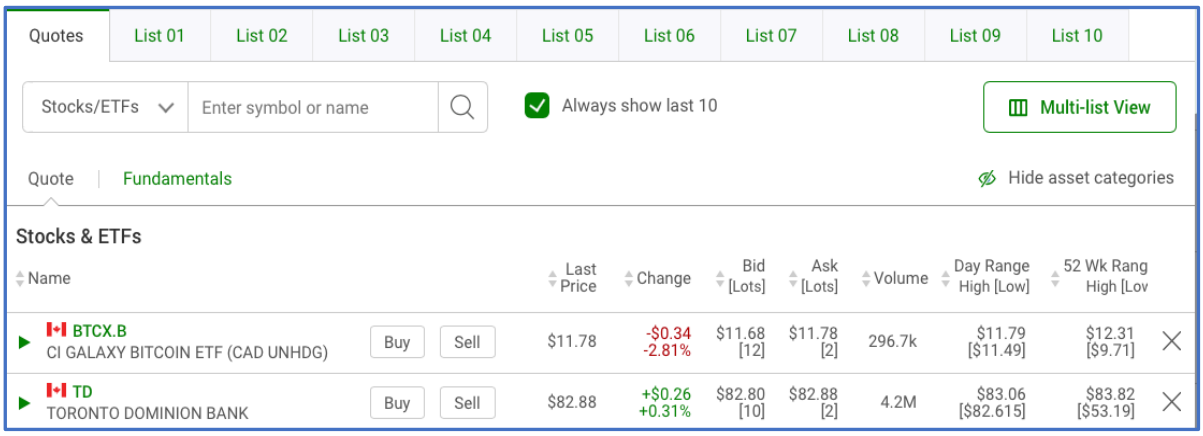
3. In the **Name/Symbol** field on the upper right of the page, enter the name or symbol of the stock you want to research, and press **Enter**. The stock's page appears.
4. Gather information about the stock by viewing the metrics listed on the page. For further information, click various tabs, such as **Charts** and **Earnings**.

Obtaining a quote

To obtain a stock quote, use the **Research** tab.

1. On the **Dashboard**, click the **Research** tab. A **List** pane appears.
2. In the **List** pane, under the **Tools** category, click **Quotes**. A new **List** pane appears.
3. In the **Symbol/Name** field on the upper left of the page, enter the symbol or name of a stock, and press **Enter**. Current and historical price information appears.

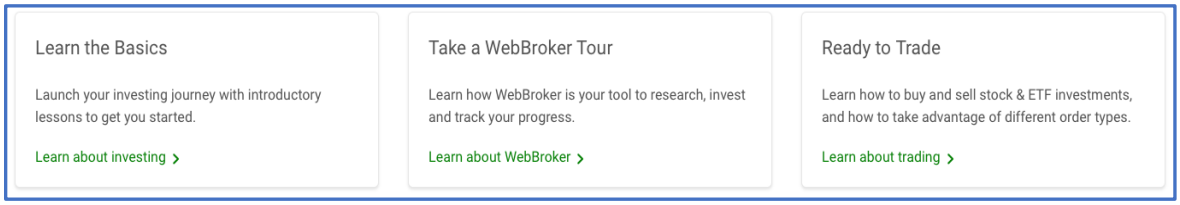
4. If desired, repeat Step 3 using other stock symbols or names. A list of stock prices will be automatically generated, as shown below.



Deciding on price type

Before placing a trade, you must decide on the price type so that your trade is fulfilled at a price that is acceptable to you.

1. On the Dashboard, click the **Learn** tab. A list of links appears.
2. Click **Learn about trading.** Three boxes appear.
3. In the **Ready to Trade** box, click **Learn about trading**, as shown below. A list appears.

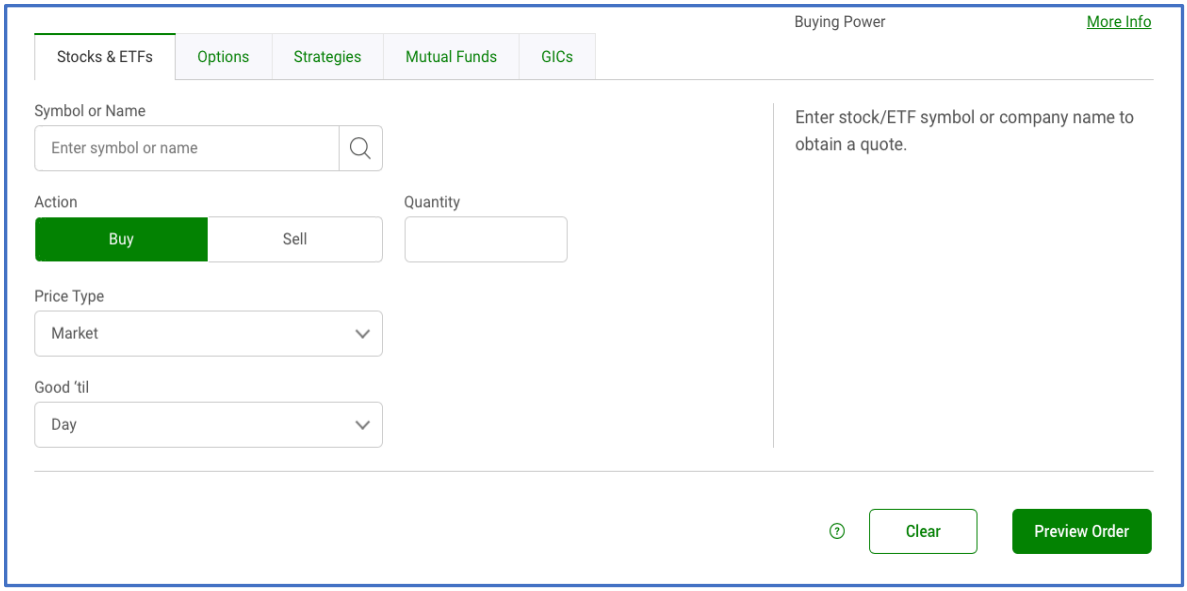


4. From the list, click **Price Type Essentials** to view a two-minute informational video about price types.

Entering trade details

After you have gathered your trade details, you can place a trade using the **Trading** tab.

1. On the **Dashboard**, click the **Trading** tab. A **List** pane appears.
2. In the **List** pane, under the **Buy/Sell** category, click **Stocks & ETFs**. The Buy & Sell window opens, as shown below.



3. In the **Symbol or Name** field, enter the symbol or name of the stock to be traded.
4. In the **Action** field, select **Buy** or **Sell**.
5. In the **Quantity** field, enter the number of stock shares or ETF units to buy or sell.
6. In the **Price Type** field, click the arrow button to display the choices and then select the desired **Price type**.

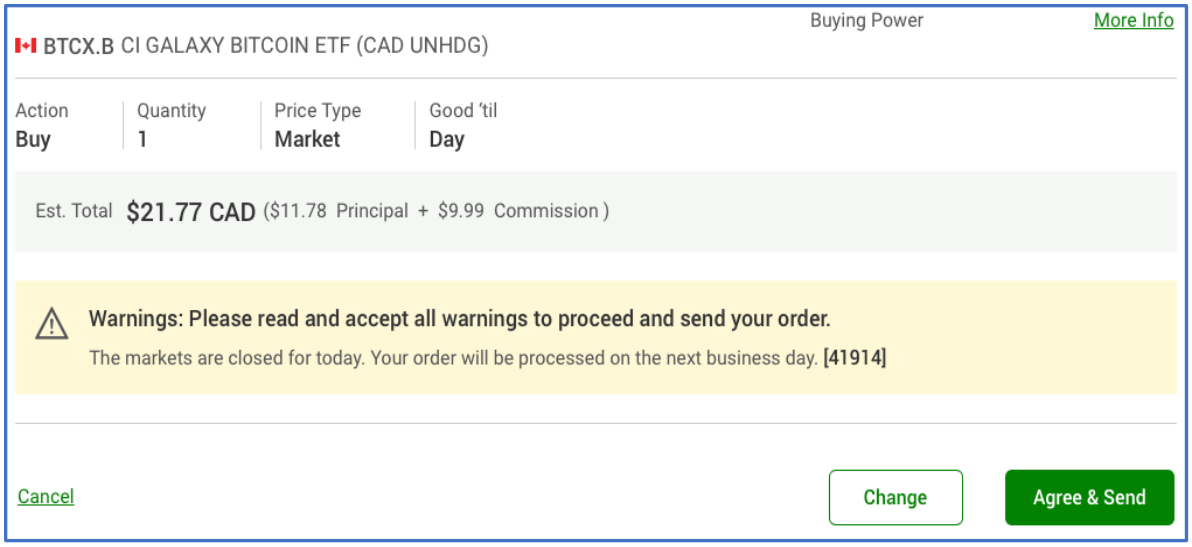
   Note: Stock market prices fluctuate significantly, and it takes two trading days to settle a trade. You therefore need to choose an appropriate price type before completing this procedure to ensure your trade is completed at an acceptable price.
7. In the **Good 'Til** field, select **Day** or **Specify**. If you choose **Specify**, select a future date from the calendar.
8. Click **Preview Order**. The Confirm Order window appears.

After you enter trade details, you must preview them and confirm the trade. See *Previewing trade details and confirming trade.*

Previewing trade details and confirming trade

After you have entered your trade details, you must preview them and confirm the trade within the Confirm Order window.

1. In the Confirm Order window, shown below, check that all fields are filled correctly, and then click **Agree & Send.**



2. If you want to correct fields, click **Change**. The Buy & Sell window opens:
    a. In the window, correct the fields as necessary.
    b. Click **Preview Order** and return to Step 1 above.

Checking trade status

After you submit a trade order, you can check its status using the **Trading** tab.

1. On the **Dashboard**, click the **Trading** tab. A **List** pane appears.
2. In the **List** pane, under the **Trade Management** category, click **Order Status**. The Status window opens showing a table of active trades.
3. In the table, consult the "Status" column to confirm whether your trade is "Open" or "Fulfilled."

Next chapter: Trading options

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