# 📊 Getting Started with Ticker Toolkit™

Thank you for choosing Ticker Toolkit™. This guide will walk you through each of the features and capabilities offered by Ticker Toolkit™ Basic Edition (TTK Basic) and Ticker Toolkit™ Deluxe Edition (TTK Deluxe). Each lesson in the following pages indicates the applicable edition. A notation of "Deluxe Only" indicates that the feature is available in TTK Deluxe and not in TTK Basic. A notation of "All Editions" indicates that the feature is available in all Ticker Toolkit™ editions.

As you practice these lessons with your copy of Ticker Toolkit™, use the built-in Help when you need further explanation of a feature or concept. Click on the
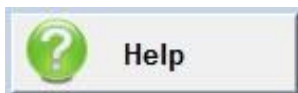
 button on the TTK Deluxe Control Panel or the

 button on each datasheet whenever you need help.
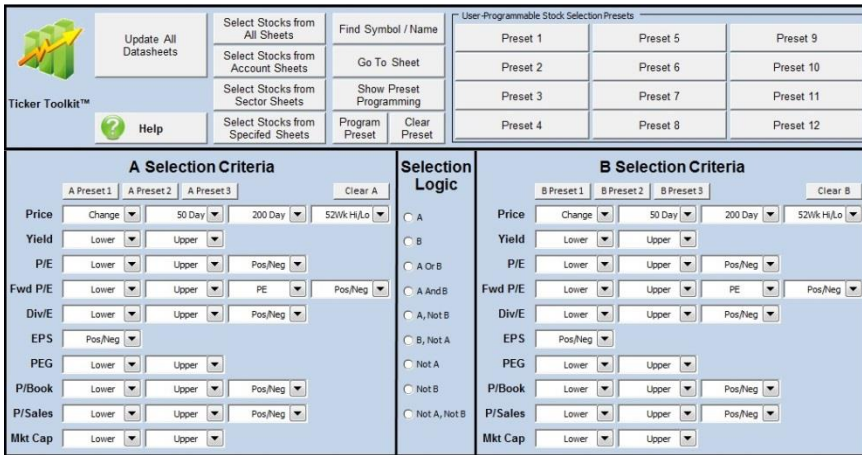
About Ticker Toolkit™

Ticker Toolkit™ is stock analysis software that simplifies the research and homework required to make informed stock investment decisions. Using Ticker Toolkit™, you will create and maintain a stock investment workbook. Your personalized workbook keeps you organized with datasheets that you create, stocks that you select and metrics that are color-coded according to your own evaluation thresholds. Run customized reports, capture notes, set price targets and quickly visualize your data to 'know what you own' and 'own what you know.'

Ticker Toolkit™ is designed for the do-it-yourself stock investor who wants a fully-functional stock analysis tool that
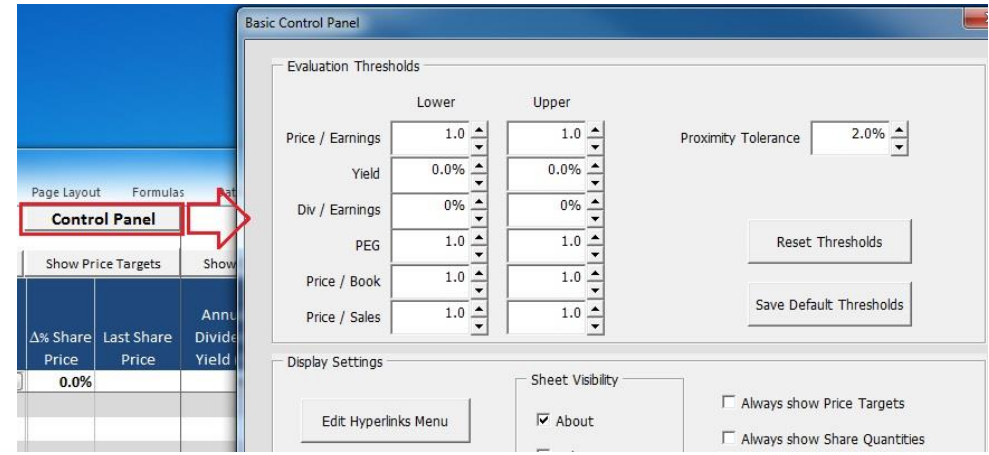- Is Inexpensive
- Is easily customized
- Is free from annoying pop-up ads
- Is independent of any brokerage firm or analyst
- Maintains the privacy of your stock research, including price targets and watch lists

Lesson 1: Ticker Toolkit™ Control Panel (All Editions)

Ticker Toolkit™ Deluxe Edition Control Panel

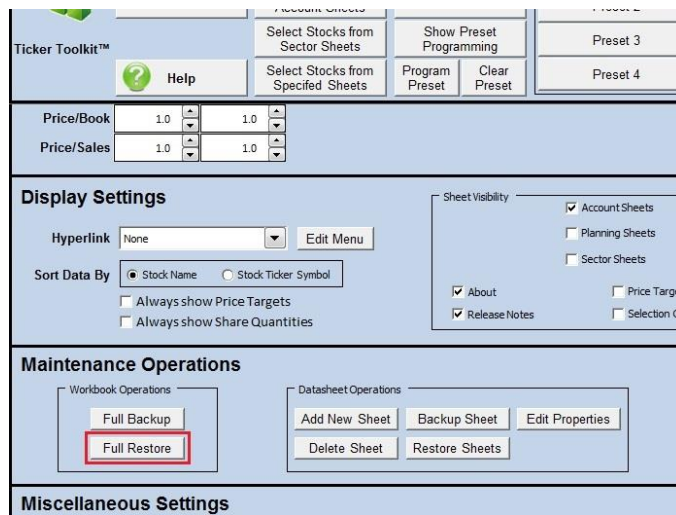Ticker Toolkit™ Basic Edition Control Panel

Ticker Toolkit™ Deluxe Edition (TTK Deluxe) opens to the Control Panel where you will personalize Ticker Toolkit™ based on your analysis style/methods, your investment goals and your risk tolerance. Click on the 'Control Panel' button to open the Control Panel in the Ticker Toolkit™ Basic Edition (TTK Basic). Since Ticker Toolkit™ is running within Microsoft Excel, you will see the Excel menu ribbon at the top of your screen. Ignore the Excel menus for now.
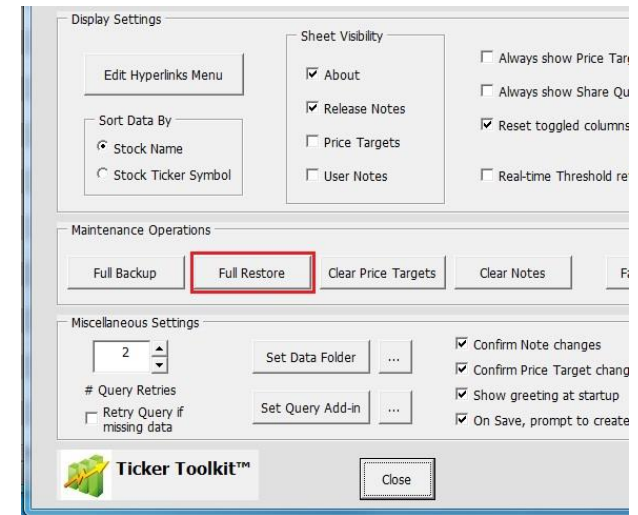

Lesson 2: Open Example Workbook (All Editions)

Ticker Toolkit™ Deluxe Edition Control Panel

Ticker Toolkit™ Basic Edition Control Panel

Ticker Toolkit™ installs example workbook files to provide you with a starting point for your own Ticker Toolkit™ workbook. Scroll down in the Control Panel to the 'Maintenance Operations' section and click 'Full Restore' to import one of these workbook examples.

**Lesson 3**: Open Example Workbook (Continued) (All Editions)
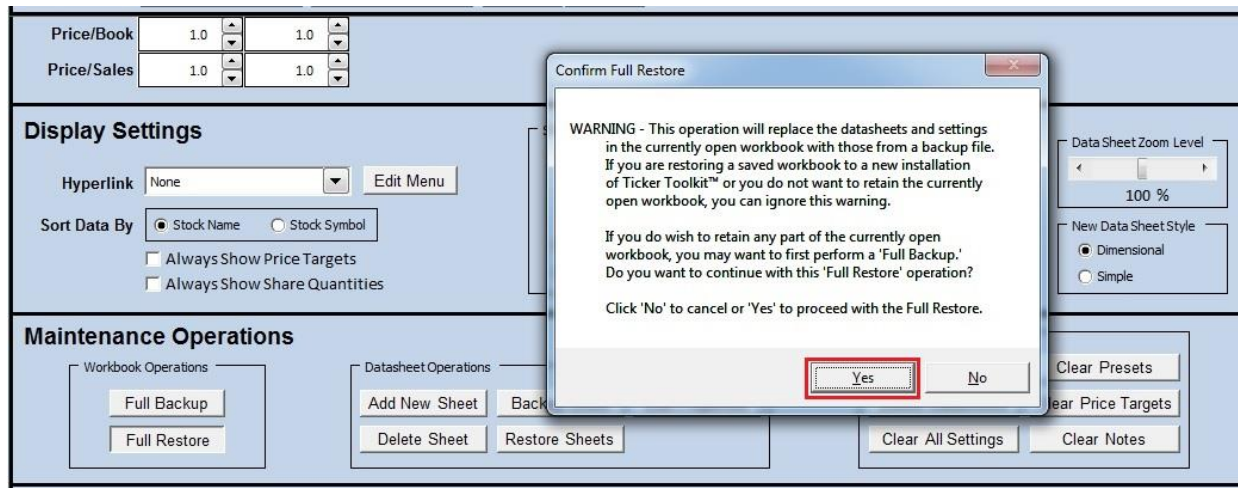
The Ticker Toolkit™ 'Full Restore' operation erases all settings and datasheets in the currently open workbook before importing the settings and datasheets from the designated backup file to be restored. Click 'Yes' to confirm erasure of the Ticker Toolkit™ settings and datasheets.

**Lesson 4**: Open Example Workbook (Continued) (All Editions)
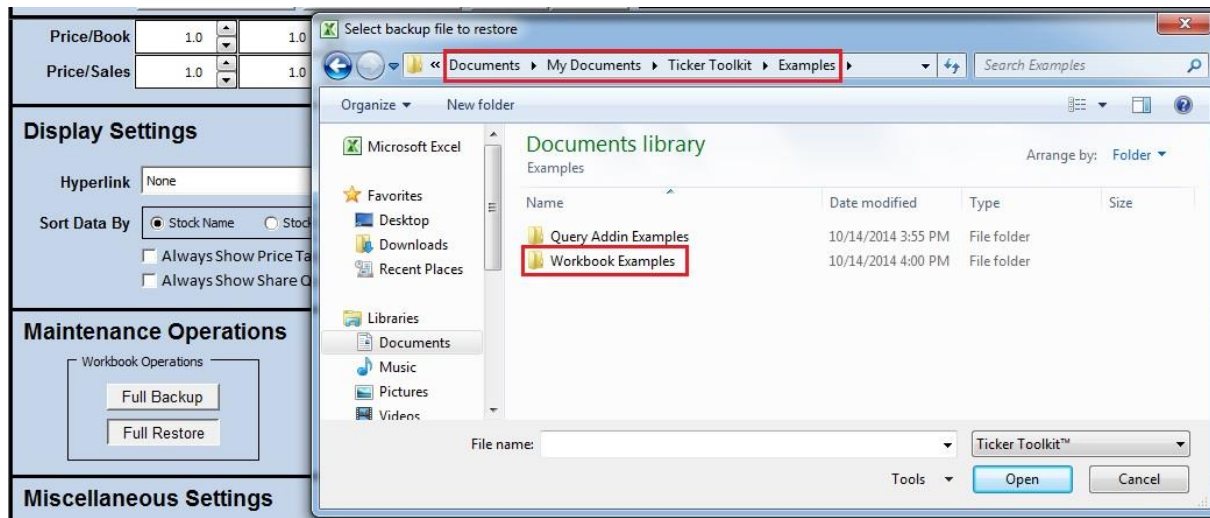
Navigate to the 'Workbook Examples' folder located in the 'Ticker Toolkit->Examples' directory. Open the 'Workbook Examples' folder.

Lesson 5: Open Example Workbook (Continued) (All Editions, with exceptions noted)
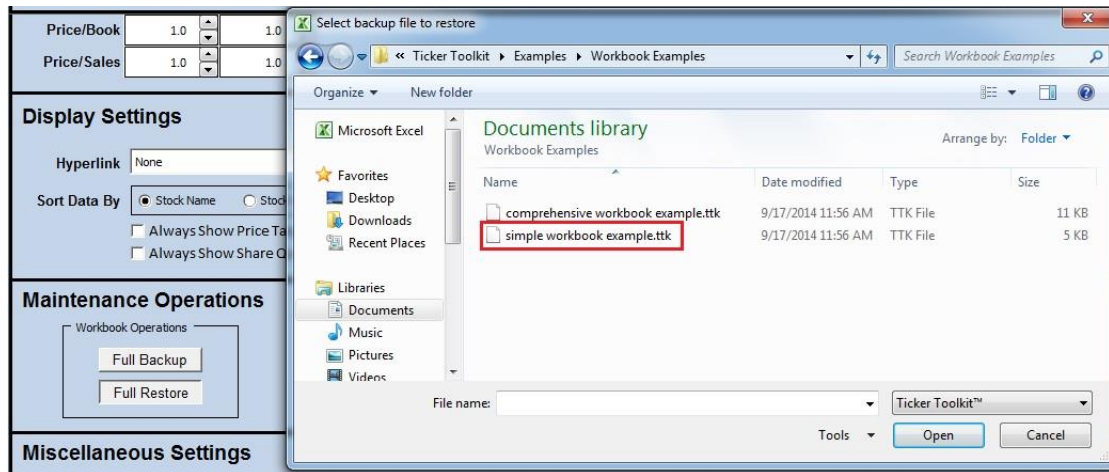
Ticker Toolkit™ installation places two examples in the 'Workbook Examples' folder. The 'simple workbook example' provides a single, empty stock datasheet to record your stock entries. The 'comprehensive workbook example' provides multiple 'sector' datasheets pre-populated with example stocks, along with two blank datasheets for your own stock entries. Select the 'simple workbook example' for this lesson. Note that the 'comprehensive workbook example' can only be restored in TTK Deluxe, since it contains multiple datasheets and TTK Basic supports only a single datasheet.

Lesson 6: Open Example Workbook (Continued) (All Editions)
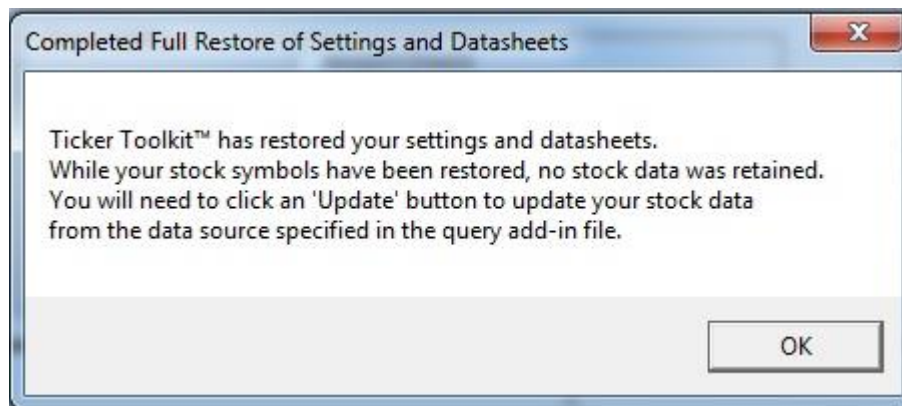
When Ticker Toolkit™ restores settings and datasheets, the datasheets are restored with only the data that you entered (including stock symbols) and none of the data retrieved from your selected stock data source. You will need to update the datasheets from your selected stock data source as we'll see in Lesson 18.

Lesson 7: Stock Selection Presets (Deluxe Only)

The example workbook that you restored includes pre-configured Stock Selection Preset buttons (Presets). Note that 'Preset 3' and 'Preset 5' buttons have not yet been configured. You will be able to customize all of the programmable Presets to your own liking. Stock Selection Presets will likely become your most commonly used mechanism to search for stocks that meet your selection criteria. We'll review a brief Preset programming example in Lesson 27.

Lesson 8: View Preset Programming (Deluxe Only)

In order to view the programmed configuration of each Preset, click the 'Show Preset Programming' button and then the Preset that you wish to view. The Preset programming will be displayed in the A and B Selection Criteria with the selection logical operator showing how the A and B Selection Criteria are combined in your search. Additionally, the datasheet scope will be displayed showing which datasheets will be included in the programmed search. Note that Presets store only Selection Criteria, Selection Logic and search scope – they do NOT store Evaluation Thresholds. Once a Preset button is programmed, you will be able to adjust Evaluation Thresholds (as shown in Lesson 9) at any time prior to clicking one of your programmed Preset buttons.

Lesson 9: Evaluation Thresholds (All Editions, with exceptions noted)

Ticker Toolkit™ Deluxe Edition Control Panel

Ticker Toolkit™ Basic Edition Control Panel

Scroll down in the Control Panel to view the Evaluation Thresholds. These thresholds are used to color-code values on each datasheet and, in TTK Deluxe, they are combined with the Selection Criteria to completely define your stock selection rules. The example workbook that you restored includes sample evaluation thresholds. You can adjust each threshold using its spin-button (up/down arrow) or by manually entering the threshold in each cell. You will adjust the thresholds to define your 'fair value' range which is suited to your own stock valuation preferences and risk tolerance. Click 'Save Default Thresholds' to save the configured thresholds as your own default values and click 'Reset Thresholds' to restore your saved defaults. You can always restore your personalized default thresholds by clicking the 'Reset Thresholds' button. This permits you to freely experiment with new evaluation thresholds knowing that a simple click of the 'Reset Thresholds' button will return you to your own default thresholds.

Lesson 10: Display Settings (All Editions, with exceptions noted)

Hyperlinks pull-down menu on the Ticker Toolkit™ Deluxe Edition Control Panel

Hyperlinks pull-down menu on each Datasheet (including TTK Basic Datasheet)

The example workbook that you restored includes preconfigured hyperlinks that you will be able to customize based on your preferred stock information/news sources. Click the Hyperlink pull-down menu to see the available hyperlinks that are configured in the example workbook. TTK Deluxe includes this Hyperlinks pull-down menu on the Control Panel and each Datasheet. TTK Basic includes this Hyperlinks pull-down on the datasheet only.

Lesson 11: Select Hyperlink (All Editions)

Hyperlinks pull-down menu on the Ticker Toolkit™ Deluxe Edition Control Panel

Hyperlinks pull-down menu on each Datasheet (including TTK Basic Datasheet)


When you click the Hyperlink pull-down menu, you will see a menu of available hyperlinks that you have customized (hyperlink customization is described in Lesson 15). Your selected hyperlink will direct you to one of your preferred information/news sources for each stock in your Ticker Toolkit™ workbook. The custom hyperlink feature will become much clearer to you after we review the stock datasheet beginning with Lesson 16. You will frequently find yourself clicking on a stock's hyperlink to get more information after its fundamentals have piqued your interest. See the on-line help (on the Ticker Toolkit™ website) for detailed instructions and examples for configuring your custom hyperlinks (http://www.tickertoolkit.com/help/online-help-library).

Lesson 12: Maintenance Operations (All Editions, with exceptions noted)
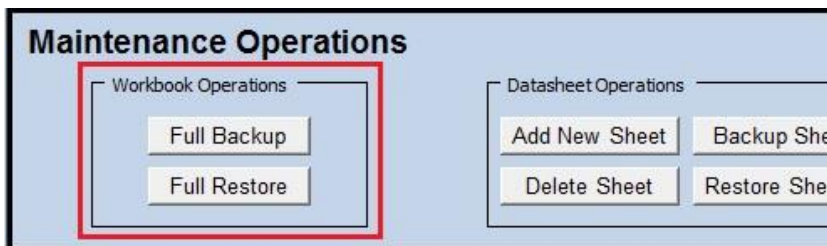
Ticker Toolkit™ Deluxe Edition Control Panel   Ticker Toolkit™ Basic Edition Control Panel
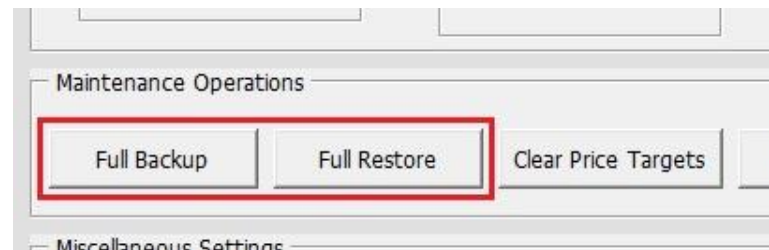
Scroll down in the Control Panel to the 'Maintenance Operations' section. Here you can backup and restore the user-entered data for a single datasheet (Deluxe Only) or the settings and datasheets for an entire Ticker Toolkit™ workbook (e.g. the example workbook that you restored for this lesson). The backup file can be shared with other Ticker Toolkit™ users (to share stock portfolios or stock watch lists). The full backup is also useful when migrating to a new version of Ticker Toolkit™. It is here, too, that you can add/delete new datasheets to/from your Ticker Toolkit™ workbook (Deluxe Only).

Typically, you will save your Ticker Toolkit™ workbook using Excel's File->Save mechanism and use the Ticker Toolkit™ maintenance operations for transferring Ticker Toolkit™ data and for creating emergency recovery backup files. It is a good idea to periodically create backup files using the Ticker Toolkit™ 'Full Backup' operation in case you need to recover a corrupt Excel workbook. With a Ticker Toolkit™ Full Backup file, you can always recover your workbook by restoring the backup in the same way that you restored the example workbook for this lesson.

Lesson 13: Miscellaneous Settings (All Editions)

Ticker Toolkit™ Deluxe Edition Control Panel
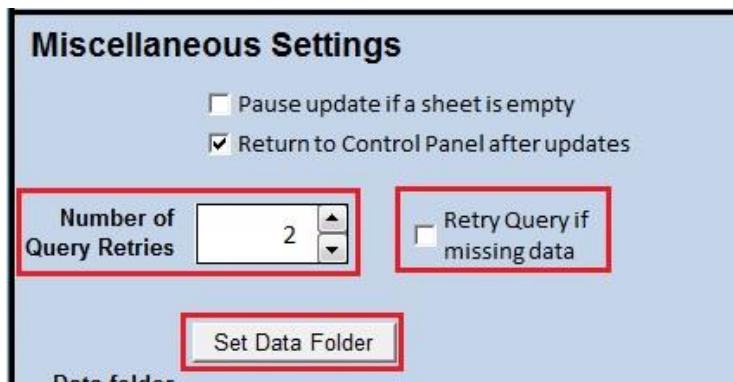
Ticker Toolkit™ Basic Edition Control Panel
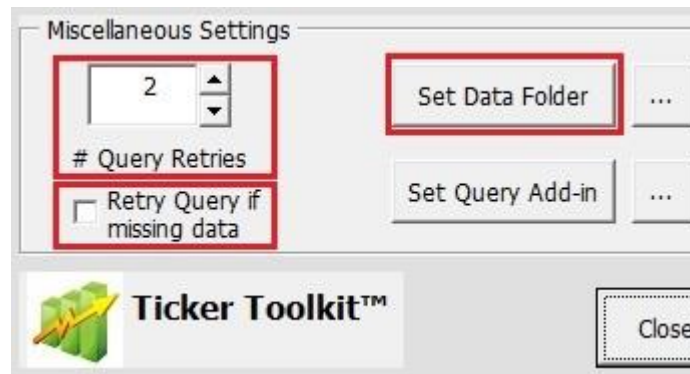
Scroll down in the Control Panel to the 'Miscellaneous Settings' section. Here, you can control certain behavioral aspects of Ticker Toolkit™, including the number of times that Ticker Toolkit™ retries a failed stock data update query. If you're using Ticker Toolkit™ with an especially poor/slow network connection, you may need to increase the number of automatic query retries. If your updated datasheets frequently contain columns of data that are not available ('N/A'), you can try checking the 'Retry Query if missing data' checkbox. *Note that enabling the option to 'Retry Query if missing data' may significantly slow-down data updates, since Ticker Toolkit™ may make more Query attempts*. The Miscellaneous Settings also include your data folder for Ticker Toolkit™ backup files.

Lesson 14: Set Backup Data Folder (All Editions)

Ticker Toolkit™ Deluxe Edition Control Panel
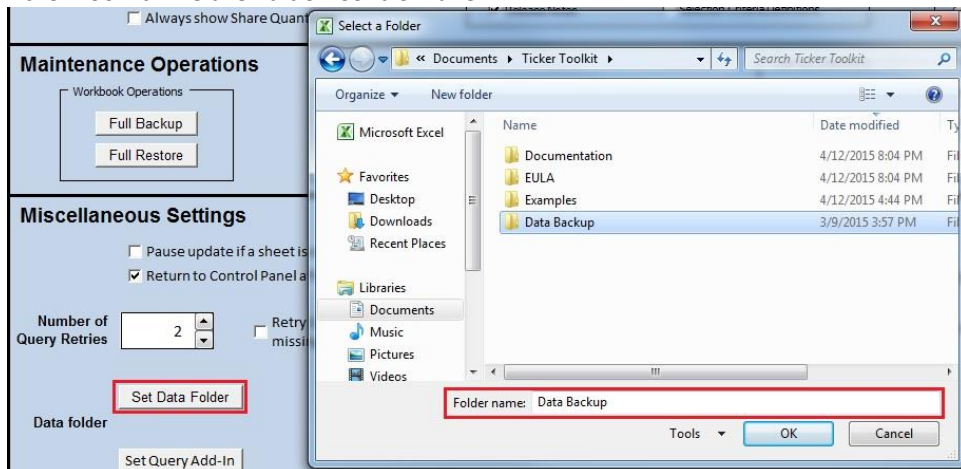
Ticker Toolkit™ Basic Edition Control Panel
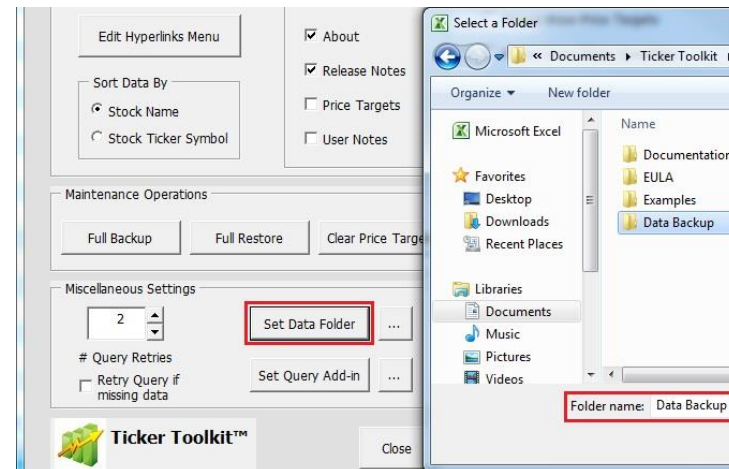
Click 'Set Data Folder' in the 'Miscellaneous Settings' section to specify the folder for the backup files that you will create. These backup files are different from the Excel workbook that you will save after each working session (by clicking File->Save). It is a good idea to create regular Ticker Toolkit™ 'Full Backups' for easy recovery from possible Excel workbook corruption and for use when you're upgrading to a new version of Ticker Toolkit™.

Lesson 15: Custom Hyperlink Menu (All Editions)

Ticker Toolkit™ Deluxe Edition Control Panel
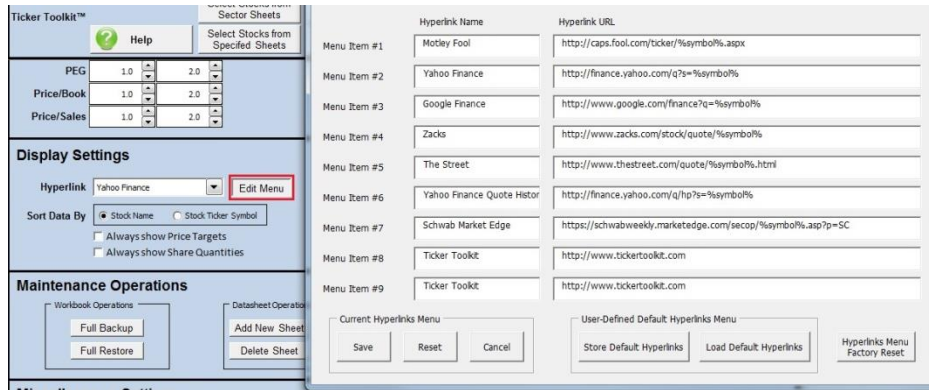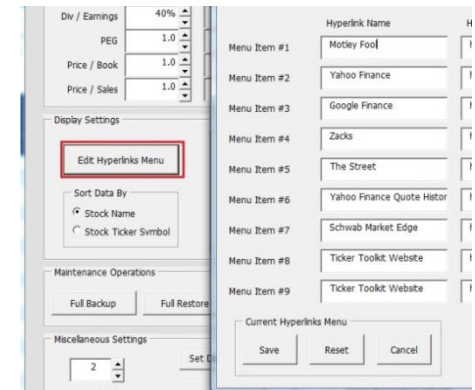
Ticker Toolkit™ Basic Edition Control Panel

Scroll up in the Control Panel to the 'Display Settings' section and click on 'Edit Menu.' Here, you can customize news/information hyperlinks that appear in the hyperlink menu that we reviewed in Lesson 11. Give each hyperlink a name (in the 'Hyperlink Name' column) and specify the URL in the 'Hyperlink URL' column. The example workbook you restored includes examples from which you can learn the URL format. Specify %symbol% where the URL needs the stock ticker symbol. Click 'Save Default Hyperlinks' to save your configured hyperlinks as defaults. Click 'Reset Hyperlinks' to restore your own default hyperlinks. See the on-line help (on the Ticker Toolkit™ website) for detailed instructions and examples for configuring your custom hyperlinks (http://www.tickertoolkit.com/help/online-help-library).

Lesson 16: Ticker Toolkit™ Datasheets (All Editions)

Stock Datasheets are the building blocks for a Ticker Toolkit™ workbook. Each datasheet can hold up to 193 ticker symbols. Depending on your Ticker Toolkit™ product, you will be able to create one (Basic Edition) or more (Deluxe Edition) stock datasheets, each with a different theme/purpose in your workbook. The example workbook that you restored includes a datasheet named 'My Account.' Click on the 'My Account' tab at the bottom of the window to view the 'My Account' datasheet.

Lesson 17: Enter Stock Symbols (All Editions)

My Account		Control Panel		Changed							
Account Sheet	❓ ...	Show Price Targets	Show $				Show Cap	Show Div Pay Dates			
	Update	Δ% Share Price	Last Share Price	Annual Dividend Yield (%)	Price / Earnings (P/E)	Price/ Earnings / Growth (PEG)	Earnings per Share (EPS)	52-Week Low	52-Week High		Bid
Symbol	Name										
Hyperlink	Yahoo Finance ▼	0.0%		0.0%	0.0	0.0					
FB											
GE											
DIS											
TWTR											
TGT											
GS											

Enter each stock symbol in an available empty cell in the Symbol column. The case, order and location of entry does not matter, as long as you're placing your entry in an empty cell in the Symbol column. Note that in rare instances, analysts, brokerage firms and stock information sources may use slightly different symbols for the same stock (e.g. Yahoo Finance uses 'RDS-B' for 'Royal Dutch Shell B Shares' while Schwab uses 'RDSB'). Be sure to enter the symbol as expected by your stock data source (Yahoo Finance in this example). Most often, the ticker symbol is consistent across stock data sources.

Lesson 18: Updating Stock Data (All Editions, with exceptions noted)

My Account		Control Panel	4/12/2015	8:26:11 PM												
Account Sheet	❓ ...	Show Price Targets	Show $				Show Cap	Show Div Pay Dates						Show P/S	
	Update	Δ% Share Price	Last Share Price	Annual Dividend Yield (%)	Price / Earnings (P/E)	Price/ Earnings / Growth (PEG)	Earnings per Share (EPS)	52-Week Low	52-Week High	Bid	Ask	50-day moving average	200-day moving average	Price / Book Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Notes
Symbol	Name															
Hyperlink	Yahoo Finance ▼	1.8%		1.3%	6.9	1.6								4.5	26.4	3.2%	
FB	Facebook Inc.	-0.2%	$ 82.04	0.0%	73.9	1.4	$1.11	$54.66	$86.07	$82.01	$82.10	$80.94	$77.66	6.3	31.9	0.0%	
GE	General Electric C	10.8%	$ 28.51	3.2%	19.0	2.2	$1.50	$23.41	$28.68	$28.54	$28.56	$25.44	$25.29	2.2	15.8	61.3%	
GS	Goldman Sachs Grou	0.4%	$ 195.64	1.2%	11.5	1.5	$17.07	$153.10	$198.06	$195.45	$195.66	$190.45	$187.21	1.2	10.6	14.1%	
TGT	Target Corporation	0.3%	$ 83.57	2.5%	(32.8)	1.5	($2.55)	$55.25	$83.74	$83.18	$84.00	$79.97	$72.40	3.8	16.7	-81.6%	
TWTR	Twitter Inc. Commo	-0.4%	$ 51.94	0.0%	(54.1)	1.8	($0.96)	$29.51	$55.99	$51.85	$51.93	$48.87	$44.21	9.1	64.1	0.0%	
DIS	Walt Disney Compan	0.2%	$ 106.95	1.1%	23.8	1.5	$4.50	$76.31	$108.94	$106.85	$106.99	$105.79	$95.65	4.1	19.3	25.6%	

When you click the 'Update' button on a datasheet, Ticker Toolkit™ retrieves stock quote data for the ticker symbols you specified. The stock quote data is color-coded for easy readability, according to the Evaluation Thresholds that you specified on the Control Panel. Review the datasheet to become familiar with the information available to you. This is the information that Ticker Toolkit™ will scan when you run the stock searches that you configure on the Control Panel. When you have multiple datasheets in your Ticker Toolkit™ workbook, you will find it more convenient to click the 'Update All Datasheets' button at the top of the Control Panel to update multiple datasheets at once (Deluxe Only). The stock quote data fields remain static until you click an 'Update' button (either the 'Update' button on a specific datasheet or the 'Update All Datasheets' button on the Control Panel (Deluxe Only)).

Lesson 19: Color-Coded Stock Data Fields (All Editions)

| My Account | | Control Panel | | 4/12/2015 | 8:26:11 PM | | | | | | | | | | | | |

| Account Sheet | ... | Show Price Targets | | Show $ | | | Show Cap | Show Div Pay Dates | | | | | | | Show P/S | | |

| **Update** | | | | | | | | | | | | | | | | | |

Symbol	Name	Δ% Share Price	Last Share Price	Annual Dividend Yield (%)	Price / Earnings (P/E)	Price/ Earnings / Growth (PEG)	Earnings per Share (EPS)	52-Week Low	52-Week High	Bid	Ask	50-day moving average	200-day moving average	Price / Book Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Notes
Hyperlink	Yahoo Finance	1.8%		1.3%	6.9	1.6								4.5	26.4	3.2%	
FB	Facebook Inc.	-0.2%	$ 82.04	0.0%	73.9	1.4	$1.11	$54.66	$86.07	$82.01	$82.10	$80.94	$77.66	6.3	31.9	0.0%	
GE	General Electric C	10.8%	$ 28.51	3.2%	19.0	2.2	$1.50	$23.41	$28.68	$28.54	$28.56	$25.44	$25.29	2.2	15.8	61.3%	
GS	Goldman Sachs Grou	0.4%	$ 195.64	1.2%	11.5	1.5	$17.07	$153.10	$198.06	$195.45	$195.66	$190.45	$187.21	1.2	10.6	14.1%	
TGT	Target Corporation	0.3%	$ 83.57	2.5%	(32.8)	1.5	($2.55)	$55.25	$83.74	$83.18	$84.00	$79.97	$72.40	3.8	16.7	-81.6%	
TWTR	Twitter Inc. Commo	-0.4%	$ 51.94	0.0%	(54.1)	1.8	($0.96)	$29.51	$55.99	$51.85	$51.93	$48.87	$44.21	9.1	64.1	0.0%	
DIS	Walt Disney Compan	0.2%	$ 106.95	1.1%	23.8	1.5	$4.50	$76.31	$108.94	$106.85	$106.99	$105.79	$95.65	4.1	19.3	25.6%	

Stock quote data is highlighted green to indicate a value that is favorable or red to indicate a value that is not favorable (based on the fair-value range that you defined with your Evaluation Thresholds). For example, FB's P/E is red because it exceeds your Upper P/E Threshold of 17.0 specified on the Control Panel (Lesson 9). Price targets, 52-week highs & lows, and moving averages are highlighted yellow when they are relevant to the last share price. For example, GE's 52-week high is yellow, because GE's last share price is 'at' its 52-week high (where 'at' is defined as being within the 'Proximity Tolerance' defined on the Control Panel. Once you become familiar with the Ticker Toolkit™ color-coding, you will be able to quickly recognize stock valuation conditions that warrant further research or action.

Lesson 20: Stock Hyperlinks (All Editions)

The stock names on each datasheet are hyperlinks that you customize on the Control Panel. Click on a stock name to open your preferred news/information source for a specific stock. Try the different hyperlinks that are configured in the example workbook to become familiar with the hyperlink capability of Ticker Toolkit™. You can change the currently active hyperlink via the pull-down menu at the top of the 'Name' column. See the on-line help (on the Ticker Toolkit™ website) for detailed instructions and examples for configuring your custom hyperlinks (http://www.tickertoolkit.com/help/online-help-library).

Lesson 21: Set Price Targets (All Editions, with exceptions noted)

Click on the 'Show Price Targets' button to reveal the Lower and Upper price target columns. Price targets are highlighted yellow when the current price is near or beyond your target, where 'near' is defined by the 'Proximity Tolerance' that you set in the Evaluation Thresholds on the Control Panel. If you enter a stock symbol on multiple datasheets, price targets for these duplicate symbols will automatically synchronize (Deluxe Only) . You can edit price targets for a specific stock on any datasheet where that stock symbol appears. To enter a price target, place your cursor in the appropriate cell and enter your price target value. Click the 'Hide Price Targets' button to hide the price target columns. You can include these price targets in your programmed stock searches on the Control Panel as implemented in the workbook examples (the sample programmed search buttons titled 'At or Below Lower Price Target' and 'At or Above Upper Price Target') (Deluxe Only).   Note that sample price targets have been entered here to illustrate the capability. Try entering your own price targets in the empty price target columns in the example datasheet.

Lesson 22: Toggle data columns (All Editions)

As you move from left to right across the datasheet, you'll notice buttons at the top of some columns (e.g 'Show $,' 'Show Cap,' 'Show Div Pay Dates'). Click on these buttons to toggle the visible stock data columns. In order to fit the datasheet within a reasonable screen size, Ticker Toolkit™ hides some columns by default. Simply click the buttons at the top of the columns to reveal the hidden data. To easily move left and right through the datasheet, use the scroll bar at the bottom right corner of the datasheet window.

Lesson 23: Notes and Checkboxes (All Editions)

My Account — **Control Panel**

Account Sheet ... Hide Price Targets | Show P/B | Show Share Quantities & Values

| Symbol	Name	Lower Price Target	Upper Price Target	Δ% Share Price	Last Share Price	Bid	Ask	50-day moving average	200-day moving average	Price / Sales Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Notes	General Purpose Checkbox
Hyperlink Yahoo Finance ▼				1.8%						8.5	26.4	3.2%		✔
FB	Facebook Inc.	$ 70.00	$ 90.00	-0.2%	$ 82.04	$82.01	$82.10	$80.94	$77.66	18.5	31.9	0.0%	Note for FB	✔
GE	General Electric C	$ 23.00	$ 29.00	10.8%	$ 28.51	$28.54	$28.56	$25.44	$25.29	1.7	15.8	61.3%	Note for GE	✔
GS	Goldman Sachs Grou	$ 175.00	$ 195.00	0.4%	$ 195.64	$195.45	$195.66	$190.45	$187.21	2.6	10.6	14.1%	Note for GS	✔
TGT	Target Corporation	$ 65.00	$ 85.00	0.3%	$ 83.57	$83.18	$84.00	$79.97	$72.40	0.7	16.7	-81.6%	Note for TGT	✔
TWTR	Twitter Inc. Commo	$ 40.00	$ 70.00	-0.4%	$ 51.94	$51.85	$51.93	$48.87	$44.21	23.7	64.1	0.0%	Note for TWTR	✔
DIS	Walt Disney Compan	$ 85.00	$ 105.00	0.2%	$ 106.95	$106.85	$106.99	$105.79	$95.65	3.6	19.3	25.6%	Note for DIS	✔

Scroll to the right to reveal the Notes column. Here, you can enter any notes about a stock. If you enter a stock symbol on multiple datasheets, notes will automatically synchronize for the duplicate symbols (Deluxe Only). You can edit notes for a specific stock on any datasheet where that stock symbol appears. Click the General Purpose Checkbox cell for one of your entered stock symbols to place a check in the symbol row. Typically, you'll check-off stocks to maintain your place as you review a datasheet. Click the top checkbox to clear all checks. Click the top checkbox again to place a check in all populated rows. Checkboxes for a stock symbol are NOT synchronized across datasheets. A stock may be 'checked' on one datasheet while being 'unchecked' on another datasheet (Deluxe Only). Note that a check may not be placed in a row that does not contain a stock ticker symbol.

Lesson 24: Enter Share Quantities (All Editions)

My Account — **Control Panel**

Account Sheet ... Show Price Targets | Show P/S | Hide Share Quantities & Values

Symbol	Name	Δ% Share Price	Last Share Price	Price / Book Ratio	Fwd P/E @ next yr's est earnings	Annual Dividend/ Earnings	Share Qty	$ Value	Day Change	% of Total	Not
Hyperlink Yahoo Finance ▼		1.8%		4.5	26.4	3.2%		$ 43,755.50	$589.50		
FB	Facebook Inc.	-0.2%	$ 82.04	6.3	31.9	0.0%	100.0000	$ 8,204.00	($13.00)	18.7%	Not
GE	General Electric C	10.8%	$ 28.51	2.2	15.8	61.3%	200.0000	$ 5,702.00	$556.00	13.0%	Not
GS	Goldman Sachs Grou	0.4%	$ 195.64	1.2	10.6	14.1%	50.0000	$ 9,782.00	$37.50	22.4%	Not
TGT	Target Corporation	0.3%	$ 83.57	3.8	16.7	-81.6%	50.0000	$ 4,178.50	$14.00	9.5%	Not
TWTR	Twitter Inc. Commo	-0.4%	$ 51.94	9.1	64.1	0.0%	100.0000	$ 5,194.00	($23.00)	11.9%	Not
DIS	Walt Disney Compan	0.2%	$ 106.95	4.1	19.3	25.6%	100.0000	$ 10,695.00	$18.00	24.4%	Not

Click on the 'Show Share Quantities & Values' button to reveal share quantity and value columns. You can enter share quantities in the 'Share Qty' column to track the value of individual holdings. You'll find this feature useful if you're tracking the value of a portfolio that you actually own or the value of an experimental portfolio (one that you do not actually own, but that is just for fun or learning). Stock quantity information is unique to each datasheet and is NOT synchronized across datasheets in your workbook. For example, you may record 100 shares of FB on one datasheet and 50 shares of FB on another datasheet (Deluxe Only). Note that sample share quantities have been entered here to illustrate the capability. Try entering your own share quantities on the datasheet.

Lesson 25: Add a New Datasheet to Your Workbook (Deluxe Only)
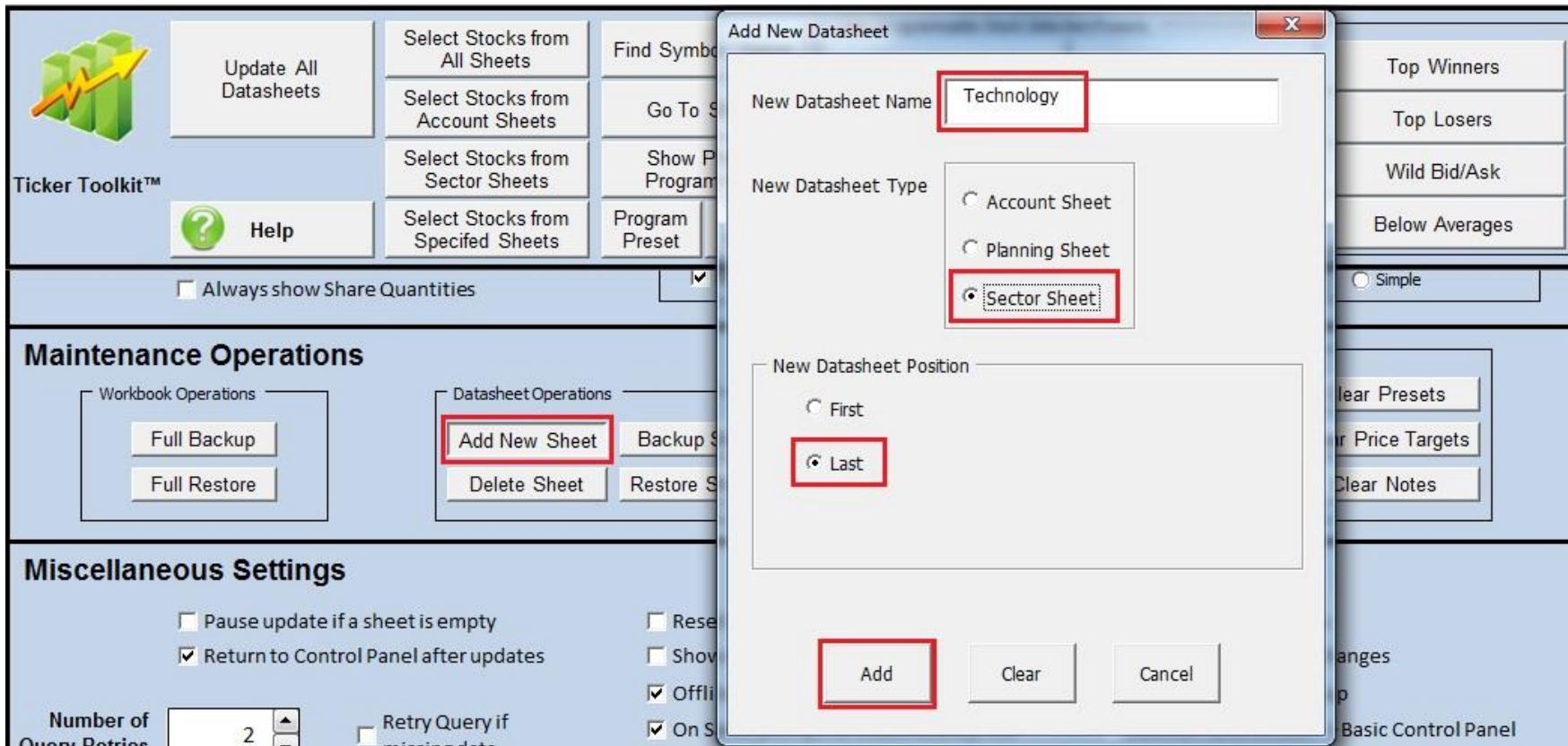
Return to the Control Panel and click on the 'Add New Sheet' button in the 'Maintenance Operations' section. In the dialog box that appears , enter the name 'Technology' (without quotes) in the 'New Datasheet Name' textbox.   Note that if you restored the example workbook 'comprehensive workbook example,' your workbook already contains a datasheet titled 'Technology' with pre-populated technology stock symbols. This lesson assumes that you do not yet have a 'Technology' datasheet.

Select the new datasheet type 'Sector Sheet.' Ticker Toolkit™ manages three types of datasheets: 'Account' sheets include stocks that you own, 'Planning' sheets include stocks that you are watching for near-term actions (e.g. buy or sell) and 'Sector' sheets include stocks in sector categories that you define (e.g. Technology, Finance, Industrial, etc.). You'll find it helpful to categorize your stocks in themed datasheets so that you can customize stock searches to a particular datasheet type (e.g. you may want to limit some searches to stocks that you own or you may want to search stocks in all sectors for potential buying opportunities).

Select 'Last' for the position of your new datasheet and click 'Add.' Ticker Toolkit™ will place the tab for your new datasheet after all of the other datasheet tabs in your stock investment workbook.

Lesson 26: Add and Delete Stock Ticker Symbols To/From Your New Datasheet (All Editions)

Technology											Show P/S					Show Share Quantities & Values		
Sector Sheet	❓ ...	Hide Price Targets																
											Price /	Fwd P/E @ next	Annual				
	Update	Lower Price	Upper Price	Δ% Share	Last Share		50-day moving	200-day moving		Book	yr's est	Dividend/				General Purpose
Symbol	Name	Target	Target	Price	Price	Ask	average	average		Ratio	earnings	Earnings	Notes				Checkbox
Hyperlink	Yahoo Finance ▾			0.0%						0.0	0.0	0.0%					
AAPL																	
FB		$ 70.00	$ 90.00										Note for FB				
TWTR		$ 40.00	$ 70.00										Note for TWTR				

Add stock ticker symbols to your datasheet by entering one symbol per empty cell in the symbol column. Note that when you enter a symbol that already exists on another datasheet (Deluxe Only), Ticker Toolkit™ automatically synchronizes price targets and notes. You can change price targets and notes for a stock symbol in any datasheet where that duplicate symbol appears. Click the 'Update' button to retrieve stock quote data for your newly entered symbols. This stock quote data will be retrieved from the data source specified in the Query Add-in file. An example Query Add-in file is configured during installation so that you can immediately begin using Ticker Toolkit™ with minimal configuration. To delete a symbol from a datasheet, click on the symbol to be deleted and press Backspace or Delete and press Enter. If the deleted symbol appears on other datasheet(s) (Deluxe Only) and has notes and/or price targets, Ticker Toolkit™ will ask you if you would like to retain the notes/price targets for the deleted symbol. If you delete the last instance of a symbol in your workbook, Ticker Toolkit™ will ask you to confirm that you want to delete the last instance before automatically deleting the associated notes and price targets for that symbol.

Lesson 27: Stock Searches (Deluxe Only)

One of the most powerful features of Ticker Toolkit™ is its ability to store and execute pre-programmed searches via the Preset buttons on the Control Panel. Since the searches become increasingly more meaningful as your Ticker Toolkit™ workbook expands with more datasheets and more stock symbols, restore the example workbook titled 'comprehensive workbook example' for this lesson. After you restore the example workbook, click the 'Update All Datasheets' button at the top of the Control Panel. When the update has completed, all of your datasheets will be updated with stock data from the data source specified in the Query Add-in file (an example Query Add-in file is configured for you during installation, so that you can immediately begin using Ticker Toolkit™ with minimal configuration). For this lesson, let's create a simple stock search that selects all stocks whose price has increased, whose P/E Ratio is below our Upper P/E Threshold and whose Forward P/E Ratio is below our Lower P/E Threshold. Before configuring our search, clear the current selection criteria by clicking the 'Clear A' and 'Clear B' buttons highlighted in the figure above.

Lesson 28: Stock Searches (continued) (Deluxe Only)

Click 'A' under the 'Selection Logic' heading to indicate that our programmed search uses only the 'A Selection Criteria.' In the 'A Selection Criteria,' select Price: 'Uptick', P/E: '≤ Upper' and Fwd P/E: '≤ Lower' as shown in the figure above. Note that configured (active) selection criteria have a ' √ ' (check) next to them while the inactive selection criteria do not have a ' √ ' (check).

Lesson 29: Stock Searches (continued) (Deluxe Only)

Click the 'Select Stocks From All Sheets' button to test your search. The stocks whose metrics match your search criteria (Selection Criteria combined with Evaluation Thresholds) will be displayed in the 'Report' datasheet (a new datasheet that is automatically created by Ticker Toolkit™ each time you perform a stock search). Inspect the Report to confirm that your search is working properly. Only stocks matching your search criteria (Selection Criteria combined with your Evaluation Thresholds) should appear in the Report.

Lesson 30: Stock Searches (continued) (Deluxe Only)

After you've confirmed that your search is working properly, assign your search to the 'Preset 3' button as follows: On the Control Panel,
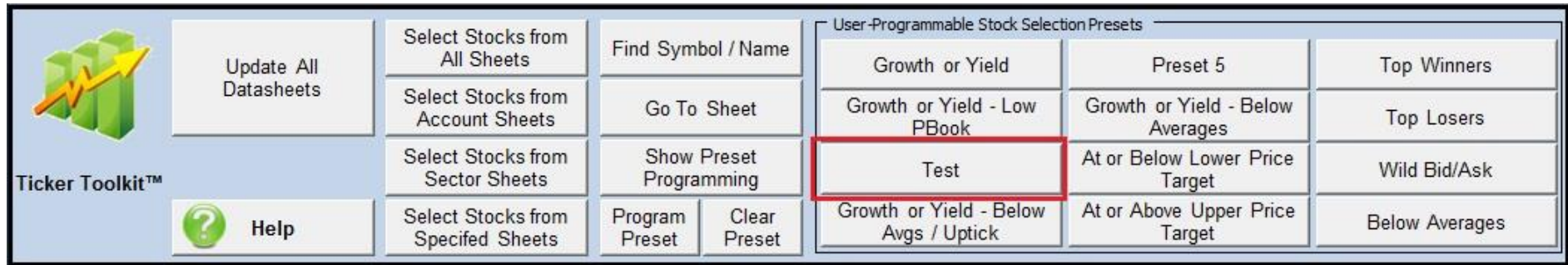
- Click the 'Program Preset' button
- Click the 'Preset 3' button
- Select the 'User Selectable' scope' and click 'OK.'

Lesson 31: Stock Searches (continued) (Deluxe Only)

Enter 'Test' (without quotes) for your new programmed search button name and click 'OK.'

Lesson 32 : Stock Searches (continued) (Deluxe Only)

Now click your 'Test' button to try it.

To see all of the stock selection criteria that are available for your programmed searches, scroll down in the Control Panel to the 'Display Settings' and find the 'Sheet Visibility' checkboxes. Place a check in the 'Selection Criteria Definitions' check box to expose the hidden 'Selection Criteria Definitions' sheet . Then click on the "Selection Criteria Definitions' tab at the bottom of your workbook.

Lesson 33: Activate Your Copy of Ticker Toolkit™ (All Editions)

If you wish to continue using Ticker Toolkit™ beyond your 30-day free trial evaluation period, visit http://www.tickertoolkit.com/purchase and follow the license activation instructions. As instructed, you will need your unique 'Computer Code' to obtain your license key. To obtain your Computer Code, click on the 'Ticker Toolkit' menu in the Excel command ribbon at the top of your Ticker Toolkit™ workbook window and then click on 'Register.'

Click the 'Copy to clipboard' button in the dialog box that appears and then paste the Computer Code as instructed on the Ticker Toolkit™ website purchase page.

You may purchase the 'TTK Basic Edition' which provides the ability to create a single stock datasheet (holds up to 193 stocks) that is color-coded according to your own custom evaluation thresholds or you may purchase 'TTK Deluxe Edition' which empowers you to create an unlimited number of datasheets with the ability to create pre-programmed stock searches.

Visit http://www.tickertoolkit.com for detailed features, capabilities and pricing for each Ticker Toolkit™ product.