## Ticker Toolkit<sup>™</sup> Installation Guide

Ticker Toolkit<sup>™</sup> requires a PC running any version of Microsoft Windows and Microsoft Excel 2007, Excel 2010, Excel 2013 or Excel 2016.

Step 1: Run Ticker Toolkit Setup	
32-bit Excel	64-bit Excel
Ticker Toolkit Setup 32-bit	Ticker Toolkit Setup 64-bit lockxlsrtm64
Download the 32-bit or 64-bit 'Ticker Toolkit Setup.msi' setup file from h	ttp://www.tickertoolkit.com/download. If you are running 32-bit Excel,

download the 32-bit Ticker Toolkit Setup.msi file. If you are running 64-bit Excel, download both the 64-bit Ticker Toolkit.msi file and the 64-bit LockXLS Runtime installer. The links for these installation files are located at <a href="http://www.tickertoolkit.com/download">http://www.tickertoolkit.com/download</a>.

If you don't know whether you're running 32-bit or 64-bit Excel, view the instructions posted in the Frequently Asked Questions on the Ticker Toolkit website (<u>http://www.tickertoolkit.com/help/faqs</u>) under the 'Microsoft Excel' heading.

Step 2: Welcome screen	📸 Ticker Toolkit	
	Welcome to the Ticker Toolkit Setup Wizard	
	The installer will guide you through the steps required to install Ticker Toolkit on your computer.	
	WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.	
	Cancel < Back Next >	
Double-click on the Ticker Toolkit™ Setup icon t	o begin installation. Click 'Next' at the Welcome screen.	

Ticker Toolkit<sup>™</sup> is a registered trademark of Tickerware LLC. Excel <sup>™</sup> and Windows <sup>™</sup> are registered Trademarks of Microsoft Corporation.

Step 3: Terms a	and Conditions, Confirm Installation	
	🖞 Ticker Toolkit	H Ticker Toolkit
	License Agreement	Confirm Installation
	Please take a moment to read the license agreement now. If you accept the terms below, click "I Agree", then "Next". Otherwise click "Cancel".	The installer is ready to install Ticker Toolkit on your computer. Click "Next" to start the installation.
	The Evaluation Copy of a Ticker Toolkit <sup>™</sup> software product (PRODUCT) functions for 30 days without a license. Once "timed out", you must purchase and install a valid license (LICENSE) as defined in LICENSE to enable continued use of PRODUCT for a period (PERIOD) defined in LICENSE. CUSTOMER is the owner of a valid PRODUCT License. CUSTOMER must purchase and install a valid license at or before the end of each PERIOD to enable continued use of PRODUCT. CUSTOMER may discontinue use of PRODUCT at any time before the end of PERIOD and understands that the nurchase price for the current and any. ■ I Do Not Agree	
		Cancel (Back Next)
ead and acce	pt the Ticker Toolkit <sup>™</sup> terms and conditions. Click Next. Cli	ick Next again to confirm installation.
<b>∘p 4</b> : Allow Ir	Istallation User Account Control Do you want to allow the follow computer? Program name: Tic Verified publisher: Tic File origin: Ha	ving program to install software on this cker Toolkit Deluxe 32-bit Setup ckerware LLC ard drive on this computer
	Show details	Yes No Change when these notifications appear
ien asked to	allow the installation of Ticker Toolkit™, make sure that the	e installer's publisher is verified as "Tickerware LLC" and click 'Yes'.

Step 5a: Installation Complete	谩 Ticker Toolkit	X
	Installation Complete	ANY
	Ticker Toolkit has been successfully installed. Click "Close" to exit.	
	Cancel < gack	Close
After Ticker Toolkit™ is installed, you will receive	confirmation that the installation has (	completed. C

Microsoft Excel. Continue to Step 5b if you are running 64-bit Excel.

*Skip this step (skip to Step 6) if you are running a 32-bit version of Microsoft Excel* **Step 5b**: (for 64-bit Excel only) Install LockXLS 64-bit Runtime Module



If you are running a 64-bit version of Microsoft Excel, double-click on the LockXLSRTM64 icon to Install the 64-bit LockXLS Runtime module that you downloaded in Step 1. If you don't know whether you're running 32-bit or 64-bit Excel, view the instructions posted in the Frequently Asked Questions on the Ticker Toolkit website (http://www.tickertoolkit.com/help/faqs) under the 'Microsoft Excel' heading.

Step 6: Start Ticker Toolkit<sup>™</sup> for the first time



The Ticker Toolkit<sup>™</sup> installation places a shortcut on the Windows desktop and in the Windows Start Menu. Select the shortcut in the Start Menu or double-click on the desktop shortcut to start Ticker Toolkit<sup>™</sup>.

7: Enable Cor	ntent								
File	Home	Insert	Page Layout	Formulas	Data	Review	View	Developer	
U Secu	urity Warnin	g Some	active content has	been disable	d. Click for	more details.	Ena	ble Content	
	-	Update	All Data	Select Stock	ks from	F. 10		[ User-	rog

Click 'Enable Content' if prompted.

Ticker Toolkit<sup>™</sup> makes extensive use of Excel programs to turn the Excel workbook into a comprehensive stock research platform. Depending on your security settings, Excel may request your permission to run these programs. Click 'Enable Content' if prompted when you load a new version of Ticker Toolkit<sup>™</sup> for the first time. The form of this security prompt is slightly different for each version of Excel (the security prompt for Excel 2010 is pictured above). If Excel continues to prompt you to 'Enable Content' each time you run Ticker Toolkit<sup>™</sup>, you may wish to adjust your Macro security settings in the Excel Trust Center.

	- Tw	
Step 8: Acknowledge Example Data Source	Welcome to Ticker Toolkit™	
	Thank you for choosing Ticker Toolkit™.	
	Ticker Toolkit <sup>™</sup> processes stock data from your selected stock data	
	source. 'Yahoo Finance' has been pre-configured as the example data source,	
	so that you can immediately begin using Ticker Toolkit". Use of this	
	does not verify or in any way validate the data provided by this example	
	data source.	
	Refer to the examples and documentation at http://www.tickertoolkit.com	
	to learn how to customize the stock data source for Ticker Toolkit™.	
	Visit http://www.tickataolkit.com for how to videos nurshasing options	
	and other useful information about Ticker Toolkit <sup>™</sup> .	
	Click 'OK' if you no longer wish to see this message or 'Cancel'	
	if you wish to see this message again at startup.	
	OK Cancel	
Ticker Toolkit™ is provided independent of any stor	ck information services (sources The welcome scr	een informs you that Vahoo Einance has been pre-

Ticker Toolkit<sup>™</sup> is provided independent of any stock information services/sources. The welcome screen informs you that Yahoo Finance has been preconfigured as your example stock data source. This allows you to immediately begin using Ticker Toolkit<sup>™</sup>. At your own discretion, you may continue to use Yahoo Finance as your stock data source, or you can review Ticker Toolkit<sup>™</sup> examples and documentation at <u>http://www.tickertoolkit.com</u> to learn how to program your own preferred stock data source. Step 9: Start your 30-day Free Trial

Your copy of Ticker Toolkit<sup>™</sup> comes with a 30-day free trial. Now that you have installed Ticker Toolkit<sup>™</sup>, review the 'TTK Quickstart Guide' if you want to be up and running in a few simple steps and review the 'TTK Getting Started Guide' for an explanation of each Ticker Toolkit<sup>™</sup> feature and capability.

The 'TTK Quickstart Guide' and the 'TTK Getting Started Guide' are located in the 'Ticker Toolkit -> Documentation' directory which was installed on your PC when you installed Ticker Toolkit™.

Visit <u>http://www.tickertoolkit.com</u> for on-line help, instructions, videos and examples to help you maximize the power of Ticker Toolkit<sup>™</sup>.

Ticker Toolkit<sup>™</sup> has extensive searchable help at your finger tips. Click on the

help on the Ticker Toolkit<sup>™</sup> Deluxe Edition Control Panel and click on the



Help

button whenever you need help on a datasheet.

button whenever you need

Step 10: Activate your copy of Ticker Toolkit™

If you wish to continue using Ticker Toolkit<sup>™</sup> beyond your 30-day free trial evaluation period, visit <u>http://www.tickertoolkit.com/purchase</u> and follow the license activation instructions. As instructed, you will need your unique 'Computer Code' which you'll find by clicking on the 'Ticker Toolkit' menu in the Excel command ribbon (at the top of your Ticker Toolkit workbook window) and then clicking "Register."



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 <u>http://www.tickertoolkit.com</u> for detailed features, capabilities and pricing for each Ticker Toolkit<sup>™</sup> product.