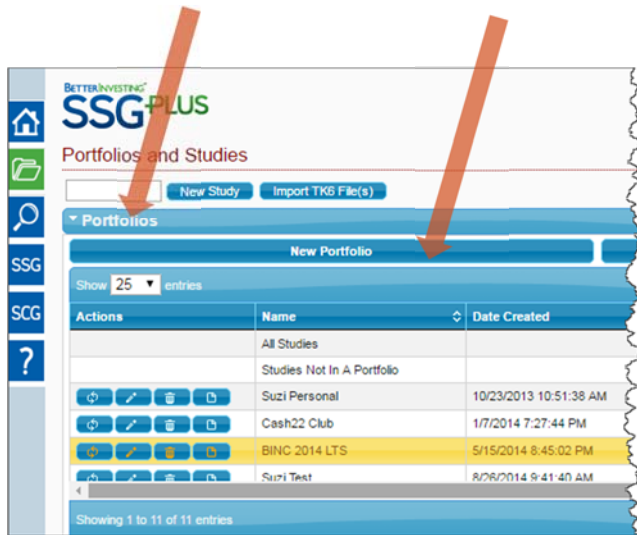




Portfolio Quick Start Guide

1 How to Add a Portfolio

Click on the **Portfolio** bar to expand the portfolio list and click on **'New Portfolio'**.



Create Portfolio

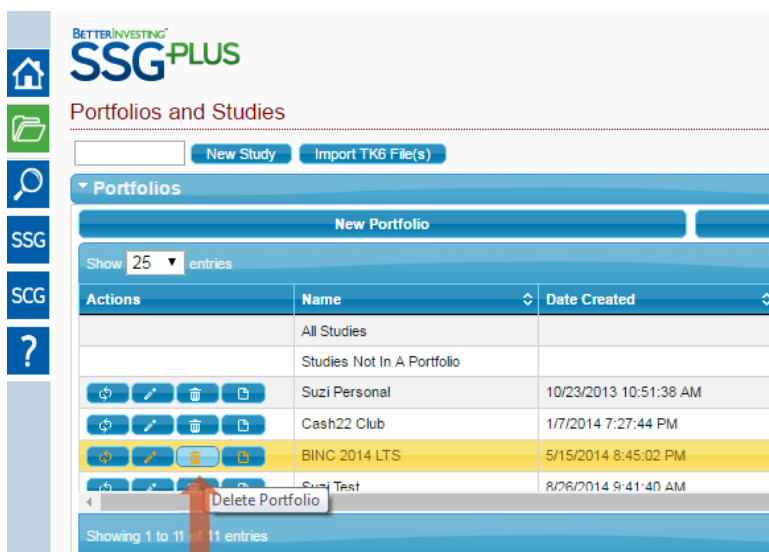
Name:


Account Name:

Description:

Name your portfolio, fill in Account Name (optional) and Description (optional) and click **'Save'**

2 How to Delete a Portfolio



Mouse over and click on the **Trash Can**  icon next to the portfolio to delete.

Confirm Delete

⚠ Delete portfolio: "Suzi Test"?

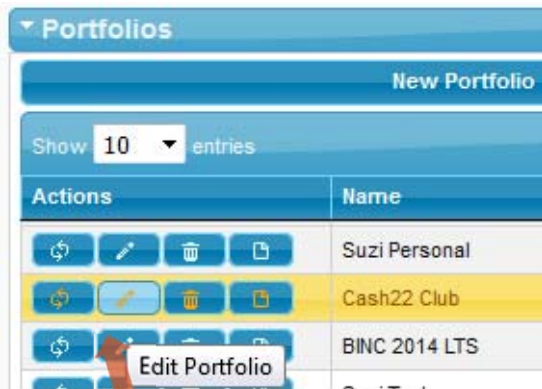
NOTE: Any studies belonging to this portfolio will not be deleted.

Click on **'OK'** to confirm. Only the portfolio name is deleted. The SSG studies are still in your account and are not deleted.

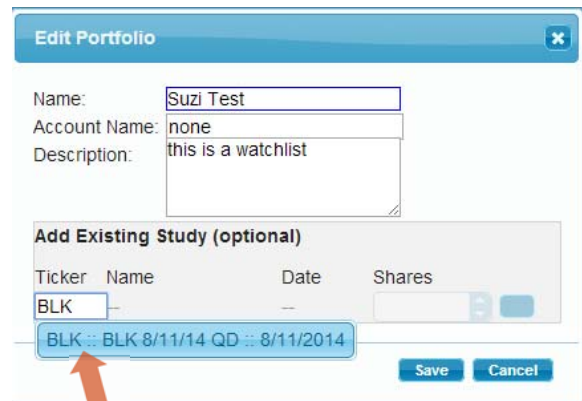


Portfolio Quick Start Guide

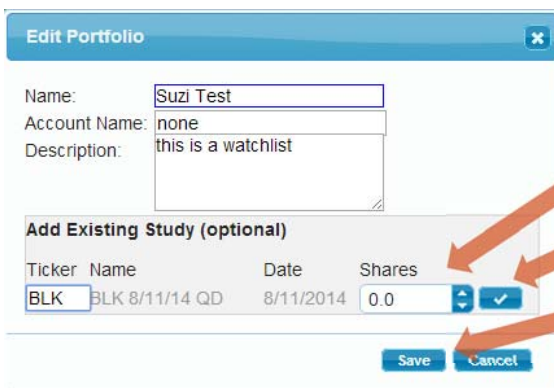
3 How to Add a Study to a Portfolio and Add Shares



Mouse over and click on the Pencil icon.

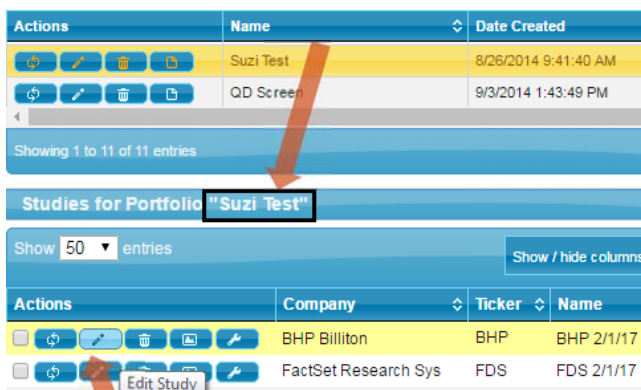


Enter the ticker of your study and pick the correct study from your study list.



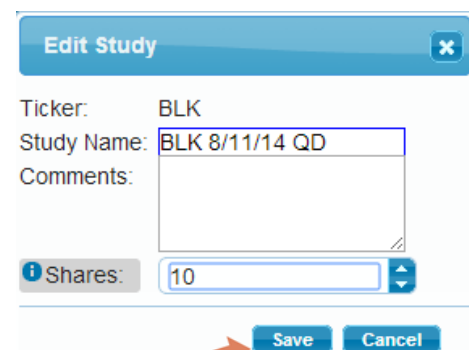
Enter the number of shares (optional) and click the Check icon to accept your changes. Repeat for all company studies in the portfolio. Click on 'Save' to save your changes.

4 How to Select a Portfolio and Edit the Number of Shares



Mouse over and click on the Pencil icon.

Select the portfolio by clicking on the row. The study list below will change to show only studies in the portfolio.



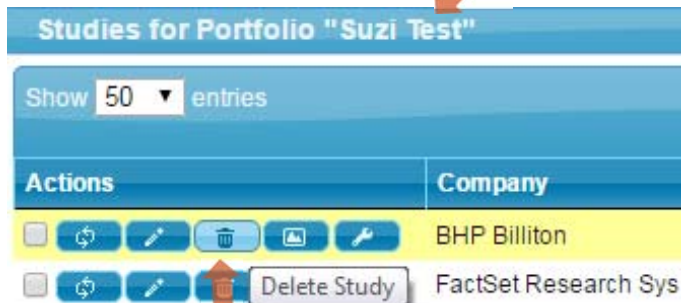
Edit the Share value and click on 'Save'.




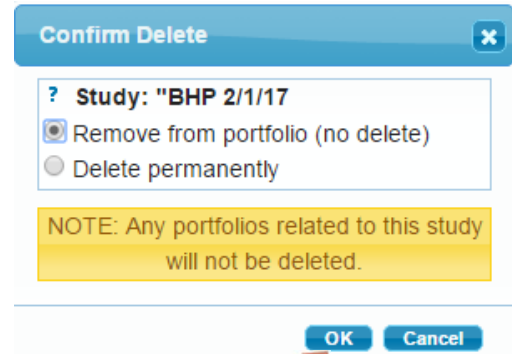
Portfolio Quick Start Guide

5 How to Delete a Study from a Portfolio

IMPORTANT: Make sure you have first selected the correct portfolio.

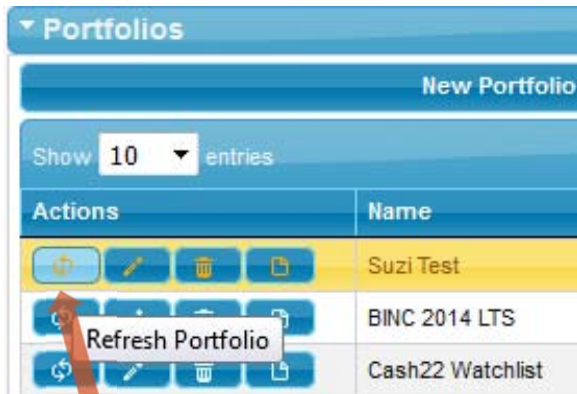



Mouse over and click on the **Trash Can**  **Icon** next to the study to delete.



Click on **'OK'** to confirm. By default the study is just removed from the portfolio and not deleted permanently.

6 How to Update Data in a Portfolio



Mouse over and click on the **Refresh**  **Icon** next to the portfolio to update.


















Choose to update all financial data and prices or update prices only. Click on **'OK'** to confirm.



Portfolio Quick Start Guide

7 How to Run a Portfolio Report

Mouse over and click on the Reports  icon.

Actions	Name	Date Created
   	Suzi Test	8/26/2014 9:41:40 AM
   	BINC 2014 LTS	5/15/2014 8:45:02 PM
   	Cash22 Watchlist	9/21/2015 6:12:02 PM
    	Cash22 Club	1/7/2014 7:27:44 PM
   	Personal	10/23/2013 10:51:38 AM

Click the buttons to select Summary, PERT or Diversification report.

Report Options

Summary PERT **Diversification**

Click on the PDF symbol to open the report in PDF format.



Report Details

Show All entries

		Portfolio Total Value		Portfolio dollar-weighted average		US/DS: 8.8		%Total Return: 16.3				
Ticker	Company	Price Date	Price	Shares	Total Value	% of Portfolio	Current P/E	Buy Below	Sell Above	US/DS	% Tot Ret	Rec
ABT	Abbott Laboratories	4/18/2016	43.95	200.0	8,790.00	7.8	25.5	46.00	62.50	4.3	11.9	Buy
AAPL	Apple	4/18/2016	107.48	100.0	10,748.00	9.5	11.4	114.70	161.50	4.8	13.2	Buy
CHRW	C.H. Robinson Worldw	3/7/2016	71.60	70.0	5,012.00	4.4	20.4	64.90	112.80	2.1	15.6	Hold

8 Report Options

Click on the Sort  icon to sort the column.

Div	Company Name	% Yield	Est EPS Nxt 12 Mo	EPS			Sales		Pre-Tax Profit			TTM EPS		Proj PE	Price	Proj RV	Pro P/E				
				Qtr End	\$	% Chg	Mill \$	% Chg	Mill \$	% Chg	% Sales	\$	% Chg				Proj PE	Price	Proj RV	HI	Avg
1.42	Costco Wholesale Cor	1.2	--	05/14	1.07		25794.0		724.0		2.8 %	4.5		116.24							
				05/13	1.04	2.6 %	24083.0	7.1 %	712.0	1.7 %	3.0 %	4.6	-3.4 %	26.0	6/11/2014	--	0.0				
1.56	FactSet Research Sys	1.2	5.15	05/14	1.21		231.8		73.4		31.7 %	4.8		126.55							
				05/13	1.20	0.8 %	214.6	8.0 %	72.0	1.9 %	33.5 %	4.4	9.0 %	24.6	8/20/2014	118.4	24.5	2			

Click on the row to open the study.

- Red 'price date' text indicates the price data is > 7 days old.
- Dashed lines in a cell indicate the study is not completed with all judgments.
- Pink highlighting on the PERT report indicates that the latest quarter change is not meeting your projections.
- PERT report field 'Proj RV' is highlighted in yellow if the value is < 80 or > 150
- PERT report field 'U/D Ratio' is highlighted in yellow if the value is < 1
- PERT report field '% Total Return' is highlighted in yellow if the value is < 10%