ViewPoint
quick start
guide

Software and data for better trading
performance

iress

Introduction

ViewPoint is scalable web-based trading and market data software offering multi-asset, multi-market trading and real-time market data.

This is our quick study guide to get you started and we also have a detailed user guide found here.

Getting started

Workspaces are saved online and are accessible from any location.

Set notification preferences to send alerts about specific quote, news and trade conditions.

The search bar allows you to conduct a basic or category search for securities, news headlines or widgets.

Drag and drop: change the position order of worksheets and the widgets in the worksheet by dragging and dropping the title of the worksheet or widget.

Use the application menu to rename your worksheet, reset your settings, set notifications, configure preferences, access the help centre and sign in and out and change your colour scheme.

Watchlists

Watchlists can be created by simply typing in the security code or name of the instrument.

Clients can **save** their custom created watchlists and **load** them.
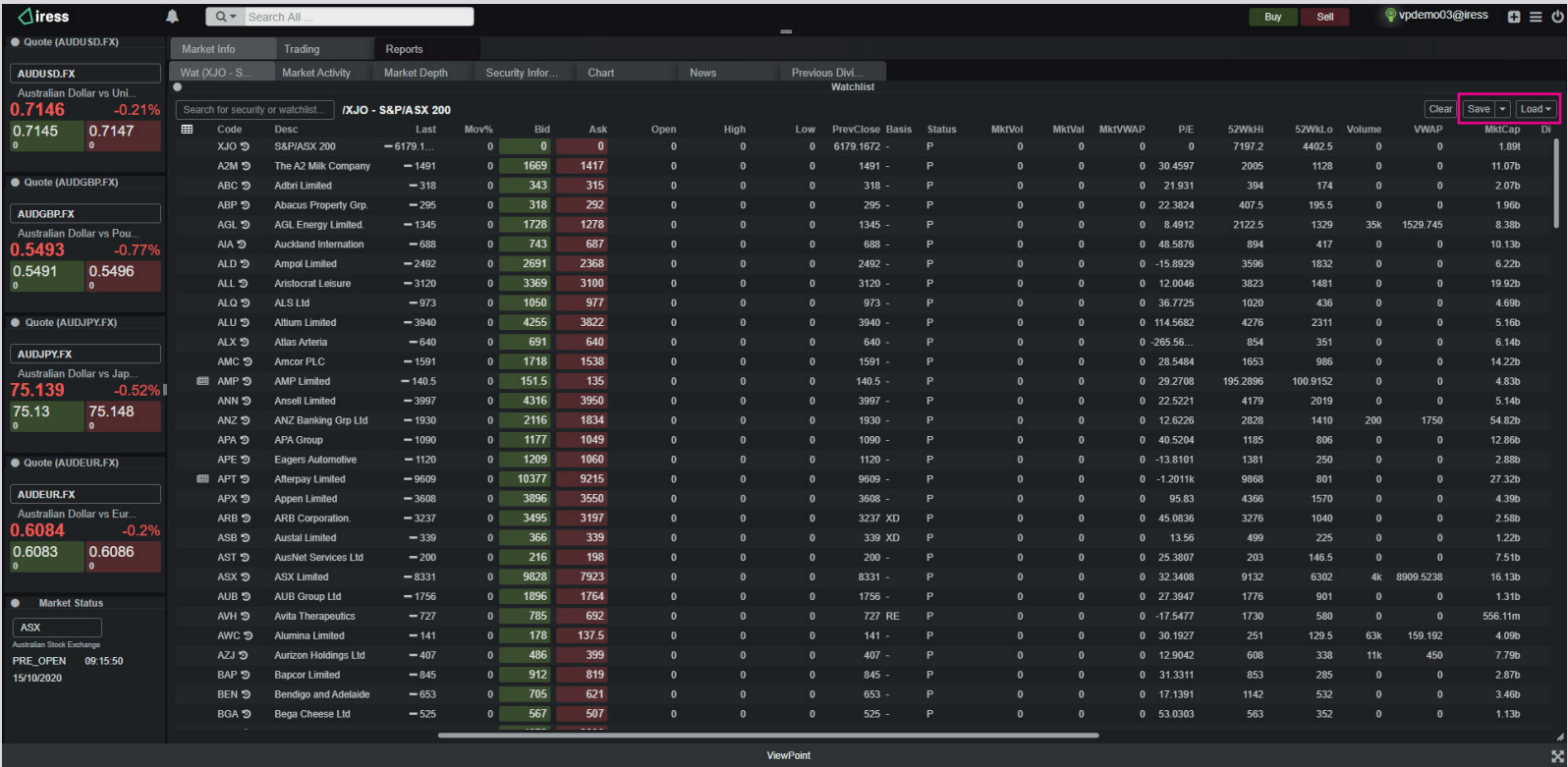
Chart

Users can create their own custom charts with indicators and drawing tools and can easily **save** and **load** them.
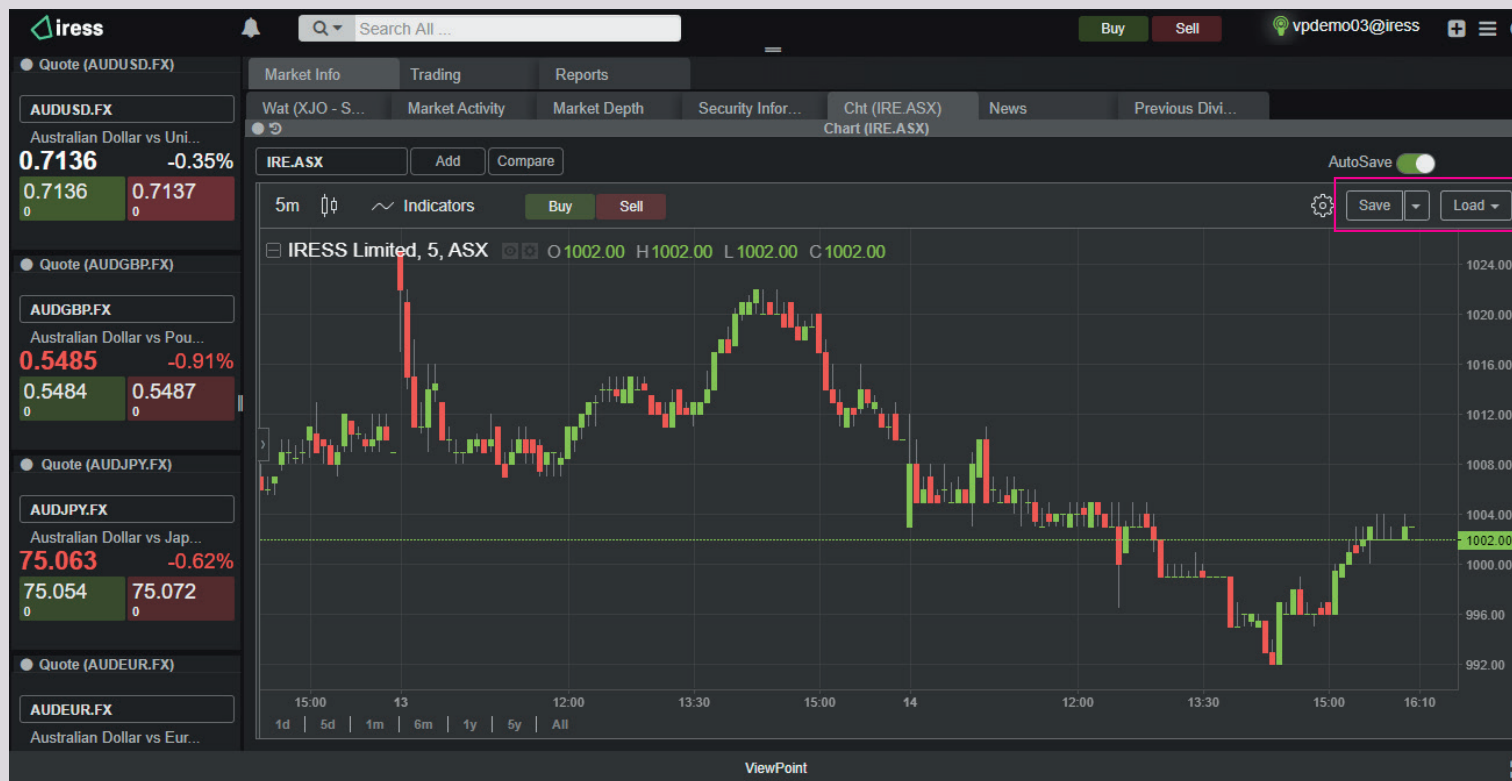
Chart

Users can include a variety of **indicators** and **drawing tools** and overlay them on the security that they have selected.
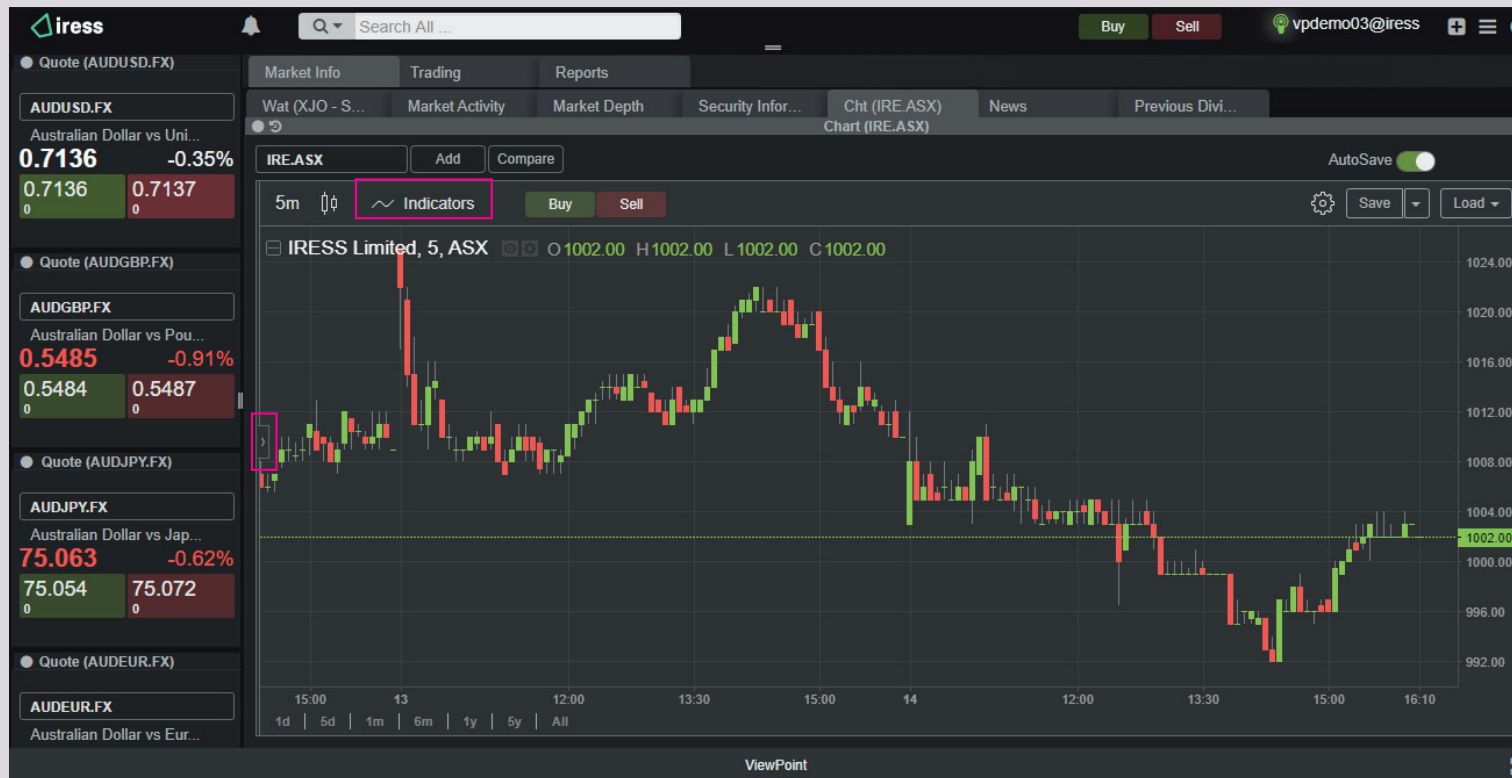
Trading

Launch the order entry ticket from multiple areas.

Click on the inline action menu.
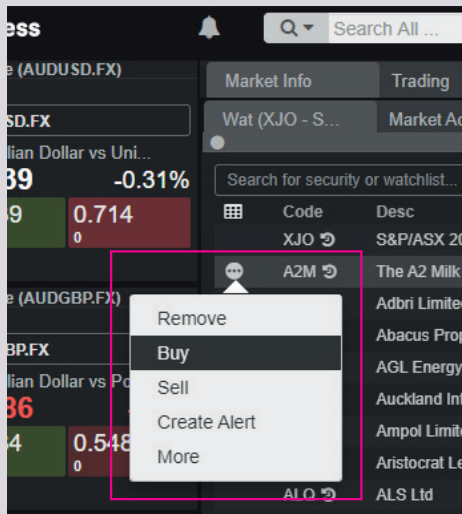
Click on the buy and sell buttons.
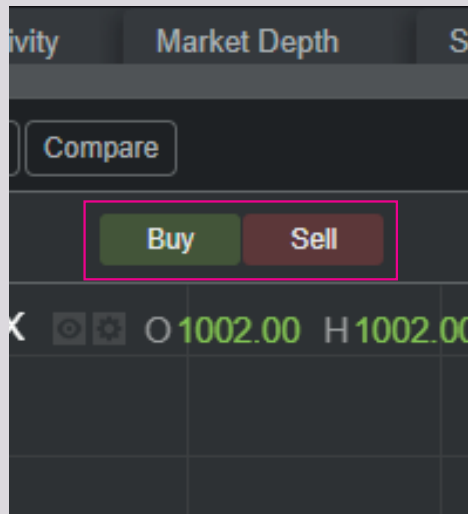
Click on the bid and ask prices.
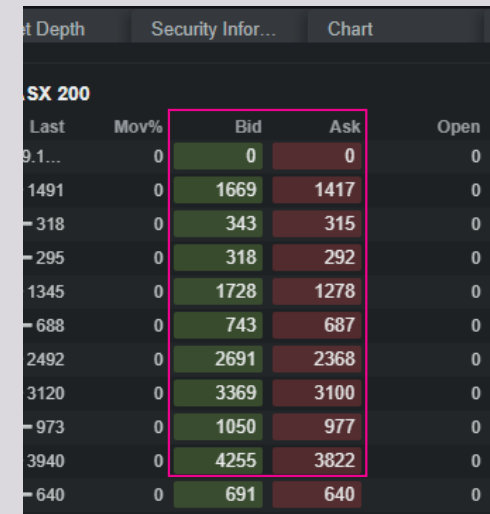
Top tips

Using Broadcast

Broadcasting is a great feature in order to 'broadcast' a particular security of interest through all the widgets that have the same **broadcast colour.**

Help centre

The application includes an online Help Centre that provides information about the application.
You can access the Help Centre in one of the following ways:

Click the **application menu** ☰ button in the top right-hand corner of the application and select Help Centre.

Click the **widget menu** ☰ in the top right-hand corner of a widget and select Help Centre to display help specific to that widget.

The Help Centre window has two tabs:

Contents: a table of contents. This is the default tab. **Index:** an alphabetical list of keywords.
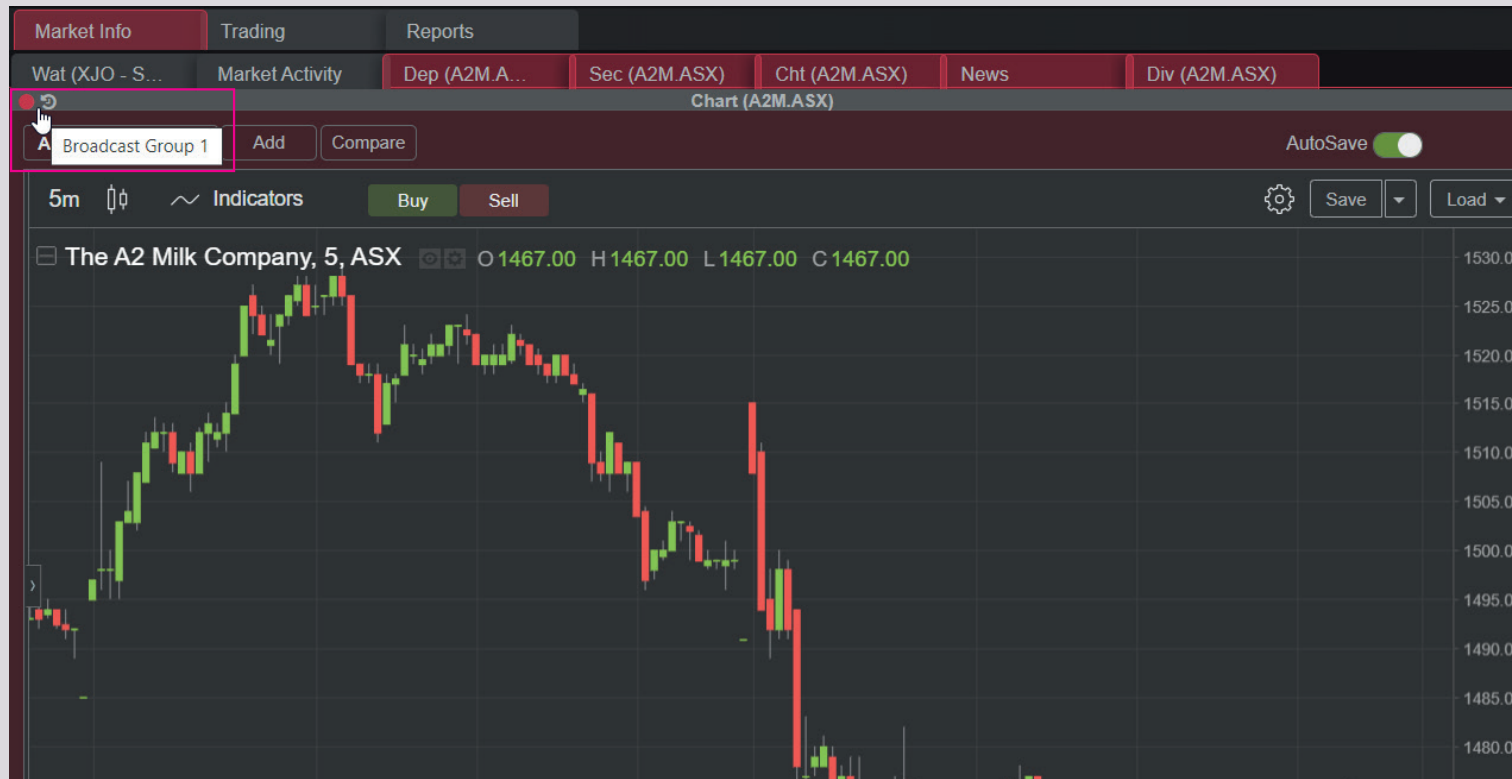
Use the table of contents
The table of contents displays pages and books. Pages represent individual help topics, while books represent groups of related help topics.

1. Select the **contents** tab.

2. To open a book, click on the book. The topics in the book display.

3. To view a topic, click a page. The topic displays in the right-hand pane.

Use the index
1. Select the **index** tab.

2. In the keyword box, type in the first few letters of a keyword you want to find. The index highlights the first word beginning with your letters.

3. Click the keyword you are interested in.

If there is only one topic associated with the keyword, the topic displays in the right-hand pane.

Use search
1. In the **search** bar in the top right-hand corner of the window, type a search word and press enter or click 🔍▾

2. Type a search word into the box and press **enter**. A list of topics containing your search words displays below the box.

3. Click a title to display the topic in the right-hand pane.

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