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Terminal Operating Manual

Complete Guide to the IntelliData Terminal

IntelliData Network Trading & Intelligence Terminal
Version 26.5 · Edition 1
Issued for licensed clients

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01 • Welcome to the Terminal

The IntelliData Terminal is a browser-based trading and market-intelligence workspace modeled on the professional terminals used on institutional desks. From a single screen you can track a watchlist, study price charts and options, read market news, converse with an AI co-pilot, watch live financial television, run paper trades, set price alerts, and build your own indicators and trading strategies.

This manual is your complete guide to operating the terminal. It assumes no prior experience with professional terminals and walks through every panel and command. A companion document, the **Script Lab Programming Manual**, covers building custom indicators and strategies in detail.

How to read this manual. Commands you type appear in **MONOSPACE**. Most actions can be performed either by clicking with the mouse or by typing a short command, so wherever a command exists it is noted alongside the on-screen control.

02 • Getting Access & Signing In

Access to the terminal is protected at two layers, and you will pass through both before you reach the trading screen.

Layer 1 - Network gate (email verification)

When you first open the terminal address, the IntelliData network edge presents a verification page. Enter the email address that was approved for your account; a one-time passcode is emailed to you. Type that code to continue. Only approved email addresses can pass this gate, so the terminal is never publicly reachable. If your email is not recognized, contact your IntelliData administrator to be added to the access list.

Layer 2 - Terminal sign-in

After the network gate you arrive at the terminal sign-in screen. Enter your **User ID** and press Enter. The terminal plays a short secure-channel boot sequence and then greets you by name, firm, and role. Your User ID identifies you for the session welcome and the status bar; it is not case-sensitive.

Signing out. Type **LOGOFF** at the command line at any time to return to the sign-in screen. Closing the browser tab also ends the session.

03 • The Terminal at a Glance

The screen is divided into panels, each dedicated to a function. The layout mirrors a professional dealing desk:

Region	What it shows
WATCHLIST	Your tracked symbols down the left, with last price and change. Click a symbol to load it everywhere.
Main panel	The large central panel. A row of view tabs across its header switches it between the Heat Map, Chart, Options, Analysis, Script Lab, Intelligence Map, and Trade Tracker. The MANUALS menu also lives here.

Region	What it shows
LEVEL II / DEPTH	The order book and time-and-sales for the active symbol.
Co-pilot panel	Tabs for NEWS, AI CO-PILOT, and LIVE TV.
PAPER ACCOUNT	Your paper-trading blotter, positions, and profit/loss.
Command line	The input bar at the bottom where you type commands.
Function keys	The F1-F12 quick-launch buttons above the command line.
Status bar	Session state, your name and firm, latency, the active ticker, and the clock along the very bottom.

Tip: the active symbol is shown as TKR in the status bar and drives the chart, options, news, Level II, and alerts simultaneously.

04 • The Command Line

The command line is the fastest way to drive the terminal. Click into the input bar at the bottom (or just start typing) and press **Enter** to execute. Commands are not case-sensitive.

Autocomplete

As you type, a suggestion list appears for both commands and symbols. Use the **Up/Down arrows** to move through suggestions, **Tab** to accept the highlighted one, and **Escape** to dismiss the list. Press **Enter** to run the completed command.

Anatomy of a symbol command

Symbol commands follow the familiar terminal grammar of a ticker, an optional asset class, and an optional action:

```
AAPL <EQUITY> GP      load Apple and show its price chart
AAPL <EQUITY> DES     load Apple and show its description
AAPL <EQUITY> N       load Apple and show its news
AAPL                  simply load the symbol
```

The asset-class tag may be <EQUITY>, <CRNCY>, <CMDTY>, or <INDEX>. If you omit the action, the symbol is simply loaded and the current view is kept.

05 • Command Reference

Every command available from the command line. Type the command and press Enter.

Command	Action
HELP / F11	Open the on-screen help card
GP / CHART	Show the price chart
DES	Company description for the active symbol
N	News for the active symbol
TOP	Top market news of the day
WEI	World equity indices

Command	Action
ECO	Economic calendar
MOST	Most active names
HEAT / IMAP	Sector heat map
OPT / OMON	Options chain
PORT	Portfolio profit/loss and blotter
NAV	Portfolio NAV history chart
IDEA / IDEAS	AI proposes one to three trade setups
AI	Open the AI co-pilot
AI <question>	Ask the co-pilot a question directly
ALRT SYM > price	Set a price alert (also accepts <)
ALRT	List active alerts
ALRT CLR	Clear all alerts
DRAW TREND	Draw a trendline on the chart
DRAW HLINE	Draw a horizontal line
DRAW FIB	Draw Fibonacci levels
DRAW CLR	Clear drawings on the active symbol
BT / BACKTEST	Backtest a strategy on the active symbol
SCAN / SCANNER	Run loaded strategies across the universe
STAR	Session-hour spread starburst study
SET / SETTINGS	Open settings
TOUR	Replay the onboarding tour
LOGOFF	Sign out of the terminal

06 • Function Keys (F1-F12)

The function-key bar above the command line gives one-click access to the most common screens. Each button runs the command shown; you can press the on-screen button or type the command.

Key	Launches
GP	Price chart
DES	Description
N	Symbol news
TOP	Top news
WEI	World indices
ECO	Economic calendar

Key	Launches
MOST	Most active
HEAT	Sector heat map
PORT	Portfolio
ALRT	Alerts
HELP	Help card
LOGOFF	Sign out

F11 opens Help from anywhere, matching the F11=HELP hint in the status bar.

07 • Loading Symbols & the Watchlist

The **watchlist** on the left lists the symbols you follow. Each row shows the last price and the change on the day. Click any row to make that symbol active - the chart, options, news, Level II, and alert context all switch to it at once.

To load a symbol that is not on the watchlist, type its ticker on the command line (optionally with <EQUITY> GP) and press Enter. The status bar TKR field always reflects the active symbol.

08 • Charts & Drawing Tools

Select the **CHART** tab (or type **GP**) to view the price chart for the active symbol. A quote header above the chart shows the symbol, name, last price, and change, plus key statistics such as the open, day range, and market cap.

Timeframe & aggregation

Controls in the chart toolbar let you change the bar interval and aggregation. The chart redraws immediately when you change them.

Drawing tools

Annotate the chart with the **DRAW** commands or the toolbar drawing controls:

- **DRAW TREND** - draw a trendline between two points.
- **DRAW HLINE** - drop a horizontal line at a price level.
- **DRAW FIB** - place Fibonacci retracement levels.
- **DRAW CLR** - clear all drawings on the active symbol.

Drawings are kept per symbol, so switching tickers and returning preserves what you drew. You can also overlay your own indicators from the Script Lab onto this chart - see the Programming Manual.

09 • View Tabs: Heat Map, Options, Analysis

Heat Map (HEAT / IMAP)

A color-coded grid of the market by sector, green for gainers and red for decliners, sized and shaded by performance. A fast way to see where the day's strength and weakness sit.

Options (OPT / OMON)

The options chain for the active symbol: calls and puts laid out by strike and expiry with their quotes. Use it to survey the surface before modeling a position in Analysis.

Analysis

An options strategy modeler. Build a position leg by leg - choose calls or puts, buy or sell, quantity, strike, days to expiry, and implied volatility - and the panel charts the resulting payoff so you can see the risk and reward profile before you commit.

10 • Intelligence Map & Trade Tracker

Intelligence Map (INTEL)

A live global operations map, theme-synced to the rest of the terminal. Use the POP-OUT control in its toolbar to open it in its own resizable window for a dedicated display.

Trade Tracker (TRADES)

Your full trade-logging and performance application, embedded directly in the terminal. Record trades and review your statistics without leaving the workspace. As with the other embedded views, a POP-OUT control opens it in a clean standalone window.

11 • News, AI Co-Pilot & Live TV

The co-pilot panel on the right carries three tabs.

NEWS

Headlines for the active symbol, plus the day's top stories. Type **N** for symbol news or **TOP** for the day's top news to refresh.

AI CO-PILOT

A conversational analyst. Open it with the AI CO-PILOT tab or by typing **AI**. Ask a question directly from the command line with **AI <your question>** - for example, **AI what is driving tech today?** The co-pilot can summarize news, explain moves, and reason about the names you are watching. (AI features use the Anthropic key configured in Settings.)

LIVE TV

Streams live financial and news television - Bloomberg TV, ABC News Live, and NBC News Now - right inside the panel, with a pop-out option for a larger window. Live TV requires that the terminal be served over the web (it will not play from a local file).

12 • Trade Ideas

Type **IDEA** (or **IDEAS**) and the AI proposes one to three concrete trade setups based on current context. Each idea is actionable - click it to pre-fill an order ticket so you can paper-trade the setup immediately.

13 • Level II / Depth

The LEVEL II / DEPTH panel shows the order book for the active symbol - resting bids and offers by price level - alongside a TIME & SALES view of recent prints. Toggle between the L2 book and Time & Sales using the controls in the panel header. Reading depth helps you gauge near-term supply and demand around the current price.

14 • Paper Trading & Portfolio

The terminal includes a full paper-trading account so you can practice and test ideas with no real money at risk.

- **Order ticket** - buy or sell the active symbol; ideas from the IDEA command can pre-fill it.
- **Blotter** - the PAPER ACCOUNT panel lists your fills and open positions.
- **Portfolio P&L** - type **PORT** to load profit/loss across your positions.
- **NAV history** - type **NAV** for a chart of your account value over time.

Your starting cash and default order size are configurable in Settings.

15 • Price Alerts

Set a price alert so the terminal tells you when a symbol crosses a level.

```
ALRT AAPL > 195    alert when AAPL trades above 195
ALRT AAPL < 180    alert when AAPL trades below 180
ALRT               list active alerts
ALRT CLR           clear all alerts
```

When an alert triggers, the terminal shows a toast notification and plays a chime. The first time you set an alert your browser may ask permission to show desktop notifications - allow it to be notified even when the tab is in the background. Alerts only accept symbols the terminal recognizes.

16 • The Manuals Menu

The **MANUALS** menu sits in the header of the main chart panel, beside the view tabs. Click it to open a short menu and choose a document:

- **Terminal Operating Manual** - this document.
- **Programming Manual** - the Script Lab guide to building indicators and strategies.

Each opens as a PDF in a new browser tab. Close the menu by clicking elsewhere or pressing Escape.

17 • Settings & API Keys

Type **SET** (or **SETTINGS**) to open the settings panel. From here you control:

- **Theme** and whether themes auto-rotate.
- **Polling** - how often live data refreshes.
- **Sounds** - alert chimes and effects on or off.
- **Starting cash** and **default order size** for paper trading.

- **API keys** - your own keys that unlock live data and AI features.

About API keys

The terminal can run on its built-in sample data, but connecting your own keys turns on live capabilities. Keys are stored only in your browser, never on a shared server.

Key	Enables	Where to get it
Finnhub	Live news headlines	finnhub.io (free tier available)
Anthropic	AI co-pilot & sentiment	console.anthropic.com
TastyTrade	Brokerage data via secure proxy	Through your IntelliData proxy URL

Your keys stay yours. API keys live in this browser's local storage only. Clearing your browser data removes them, and they are never included when the site is published.

18 • Themes & Display

The terminal ships with several color themes - the default network look plus classic amber, green, blue, a color-blind-safe palette, an X.Org-inspired theme, and the IntelliData theme. Choose one in Settings.

Theme rotation & preview

With rotation enabled, the terminal cycles through themes automatically every 15 minutes - useful on a display you glance at throughout the day. You can preview and step through themes from the home screen using the theme hotkey, so you can confirm each one renders the way you like.

19 • Guided Tour

New to the terminal? Type **TOUR** to replay the onboarding walkthrough, which highlights each panel in turn. The tour runs automatically the first time you sign in and can be replayed any time.

20 • Troubleshooting

Symptom	What to check
Live TV shows a player error	Live TV needs the web-served terminal, not a local file. Reload the page; confirm you reached it through the normal address.
News or AI not updating	Confirm your Finnhub / Anthropic keys are set in Settings. Without keys the terminal uses sample data.
Verification page keeps asking for a code	Use the exact approved email; check spam for the passcode. If your email is not approved, contact your administrator.
A command says UNKNOWN CMD	Check spelling and try HELP. Symbol commands need a recognized ticker.
Alerts do not pop	Allow desktop notifications when prompted, and confirm sounds are enabled in Settings.

21 • Quick Reference

Most-used commands

```
GP  chart      N  symbol news  TOP  top news
DES  description WEI world indices  ECO  calendar
HEAT heat map   OPT options chain  MOST most active
PORT portfolio  NAV nav history   IDEA trade ideas
AI   co-pilot  ALRT alerts     SET  settings
BT   backtest  SCAN scanner    TOUR replay tour
HELP help (F11) LOGOFF sign out
```

Keyboard

- **Enter** - run the command
- **Tab** - accept autocomplete
- **Up/Down** - move through suggestions
- **Esc** - dismiss suggestions / close a card
- **F11** - open Help

Need to build your own indicators or strategies? Open the **Programming Manual** from the **MANUALS** menu.