

## Download TWS

1. Go to: <https://www.interactivebrokers.com/en/index.php?f=16040>
2. Scroll down and select “Download for Other Operating Systems”
3. Download Windows 32-bit
4. Next, go to <http://interactivebrokers.github.io/>
5. Select “I Agree”
6. Choose “IB API Stable for Windows” and download

## Configure TWS

1. Launch TWS and sign in
2. Navigate to File -> Global Configuration -> API -> Settings
3. Ensure the following are all checked:
  - Enable ActiveX and Socket Clients
  - Enable DDE Clients
  - Download open orders on connection
4. Socket Port should be set to: 7497
5. Master API client ID should be set to: 0
6. “Allow connections from localhost only” should be checked
7. TWS is now configured

## Download AutoBroker

1. <https://fusautobrokers.slack.com/messages/CJQS5BTBK/>
2. Download AutoBroker.zip
3. Open downloaded .zip file
4. Move AutoBroker folder to Desktop

## Configure AutoBroker

1. Navigate to Desktop and open AutoBroker folder
2. Right click Run AutoBroker and click edit. If prompted, edit with notepad
3. On line 3, replace \*your filepath to  
AutoBroker;example:Users\yourUser\Desktop\AutoBroker\* with your  
specific filepath and save and exit
4. Now, right click Run TWS and select edit

5. On line 4, input your username and password. Example: username:admin password:admin . Save and exit
6. Now, right click **settings** and select edit
7. In this file, you can edit your Portfolio size, Rounding quantities, Primary Order types, Auxiliary Order types, Order Durations, and Order Time Parameters. Save and exit
8. Finally, access the **tickers** Excel file. This is where you can input new tickers or remove tickers for analysis. There is no limitation to ticker quantity. Save when finished

### **Run AutoBroker Manually**

1. To run **AutoBroker**, navigate to **Desktop-> AutoBroker -> Settings**
2. Run **Run TWS** first and allow it to open fully
3. Next, run **Run AutoBroker**

### **Run AutoBroker Automatically**

1. From the Start Menu, search for **Task Scheduler** and launch
2. On the right-hand side, select **Create a Basic Task**
3. Name your task **Run TWS** and add a description if desired
4. Next, select how frequently you would like this program to run
  - a. Then, specify exact time parameters such as time and day(s) of the week
5. Next, select start a program
  - a. Select Browse and navigate to **Desktop->AutoBroker->Settings->Run TWS**
6. Select Next and Finished
7. Repeat steps 1-6 for **Run AutoBroker**
  - a. NOTE: It is advised to schedule **Run AutoBroker** at least 5 minutes **AFTER** **Run TWS** to give TWS enough time to load

### **Important Notes**

- When running **AutoBroker** for the first time, follow the steps under **Run AutoBroker Manually**. This will allow **AutoBroker** to acclimate to your computer and give you time to allow permissions should your firewall prompt you.

- If you have Two-Factor Authentication on, **AutoBroker** will not be able to sign you in. This means **AutoBroker** will not be completely autonomous. If you wish to have complete automation, disable Two-Factor Authentication. **Warning: Disabling Two-Factor Authentication removes a layer of account security.** If you do not wish to remove Two-Factor Authentication, please follow the steps under **Run AutoBroker Manually.**
- Do not have any trades currently active/pending while starting AutoBroker. This will disrupt the algorithms generating the target portfolio and could also interrupt the pending orders.