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- Determine which customer representative generated most total revenue

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Customer Help Menu

View your current stock holdings

To view your current stock holdings. Sign into your account through the button on the top-right corner of the window. Once you enter your information and enter your customer prompt screen. Press the 'current stock holdings' button and it should bring up a window for you to view all of your stocks, how many shares you have, how much money you made from them, and more!

The share-price and trailing-stop history for a given conditional order

To view the share price and trailing stop history for a given condition order. Make sure you are signed into your account. Then on the customer homepage click the view trailing-stop history button and you will be brought to a page with your stocks and their trailing stop history. If you would like to view an individual stock just click on it.

The share-price and hidden-stop history for a given conditional order

To view the share price and hidden stop history is simple. Make sure you are signed into your account. then on the customer homepage click the view hidden stop history button and you will be brought to a page with your stocks and their trailing stop history. If you would like to view an individual stock just click on it.

The share-price history of a given stock over a certain period of time

To view the share price history of a given stock over a certain period of time. Make sure to be signed into your account. When you are on the customer homepage just click the share-price history and it should redirect you to another page. Once on the other page type in your given stock and the timeframe you want to inspect. Now click submit and it will appear.

A history of all current and past orders a customer has placed

To view the order history of all current and past orders that you have placed. Go to the customer prompt menu then click on order history. This should direct you to a page with all of your current and past orders.

Stocks available of a particular type and most-recent order info

To view the stocks that are available of a particular type. Go to the customer homepage and click on buy stocks. Once there just filter out the stocks that you do not want to view and it should narrow the results down to just the ones that you want to inspect. To view your most recent order info. Go to order history and view the first order in the table. That will be your most-recent order info.

Stocks available with a particular keyword or set of keywords in the stock name, and most-recent order info

To view stocks available with a particular keyword or set of keywords. Go to the customer homepage then click on buy stocks. Once there just filter out by typing in the keywords you want to use to filter the buy results. To view your most-recent order info refer to here.

List of best selling stocks

To view the best selling stocks go to the customer homepage then click on the buy stocks option. Once here you can simply click on the best selling stocks option and it should show a list of all the best selling stocks.

Personalized stock suggestion list

To view a personalized stock suggestion based on your order history. Just go to the customer homepage and click on the personalied stock suggestions list.

Employee Help Menu

Record an order

To record an order for a customer go to the employee homepage and click the record an order button. This should redirect you to the record order page. Now fill in all of the input boxes as per the customer's requests then click submit.

Add, edit, or remove customer information

To edit, add, or remove customer information. Go to the employee homepage and click the customer button. Here you should see a list of all of the customers. If you want to add a customer click the add customer button. If you want to remove a customer click the customer you wish to remove and hit the remove button. If you want to edit a customer. Edit the customer select the customer and click edit. Now it should redirect you to a page. Fill out what you want to edit about the customer

Produce a mailing list

To generate a mailing list of all of the customer. Go to the employee homepage and click generate mailing list. This will redirect you to the mailing list page. Just copy and paste into your favorite email client and mail away!

Produce a list of stock suggestions

To produce a list of stock suggestions for a particular customer. Go to the employee homepage then click produce stock suggestions. You will be redirected to the produce stock suggestions page. Now select the customer you want to generate the suggestion for.

Manager Help Menu

Set the share price of a stock (for simulating market fluctuations in a stock's share price)

To set the share price of a stock. Go to the manager homepage and click set share price. Now set share you wish to manipulate and click edit. Now type in your desired share press and click submit.

Add, Edit and Delete information for an employee

To add, edit, or delete information for an employee. Go to the manager homepage and click on add employee to add an employee, select an employee then click edit to edit an employee, or click select an employee then click remove to remove the employee.

Obtain a sales report for a particular month

To obtain a sales report for a particular month simply go to the manager homepage then click on sales report. Now select the partiular month and you will be redirected to a page showing all the information of a sales report.

Produce a comprehensive listing of all stocks

To produce a list of all stocks. Go to the manager homepage and click the produce stocks button. This will redirect you to the page with a table containing a listing of all stocks.

Produce a list of orders by stock symbol or by customer name

To produce a list of orders whether by stock symbol or by customer name. Go to the manager homepage and click the list of orders button. Now select whether you want it by stock symbol or customer name. Based on the stock symbol/customer name select it should redirect you to the page that lists all orders based on your criteria.

Produce a summary listing of revenue generated by a particular stock, stock type, or customer

To produce a summary listing of all the revenue generate by a particular stock. Go to the manager homepage and select the summary revenue button. Now click the dropdown menu of the type of revenue you wish to generate. Then select the customer, stock, or stocktype and it should generate at the bottom of the window.

Determine which customer representative generated most total revenue

To determine which employee has generated the most total revenue. Simply go to the manager homepage and click most revenue. Now it will redirect you to a page with either customers or customer representative. Select customer representatives. It will now show which customer representative/employee has generate the most total revenue overall.

Determine which customer generated most total revenue

Follow the steps similar to here. Then instead of picking the customer representative option. Pick the customer option. It will now display the customer who has generate the most total revenue.

Produce a list of most actively traded stocks

To produce a list of the most actively traded stocks. Go to the manager homepage. Now click the view stocks button. Now sort the stocks from by the amount of orders to view the most actively traded stocks.