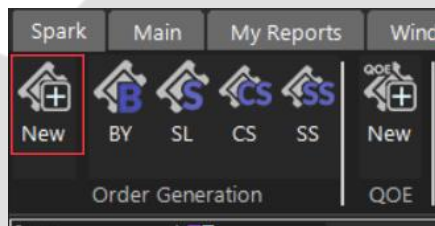


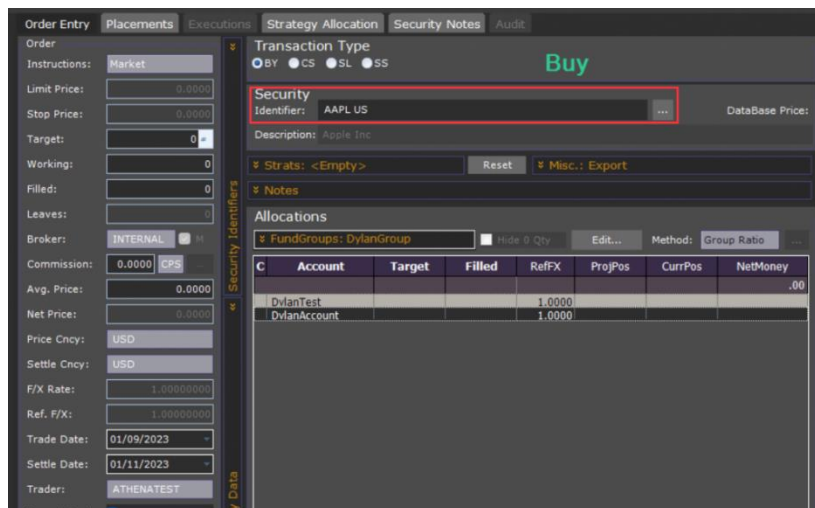
Security notes

Security notes offer the possibility to register in text format, all the orders or other interesting features for that security.

1. Open OMS window and press on 'New' to create a new order.



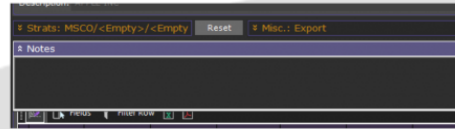
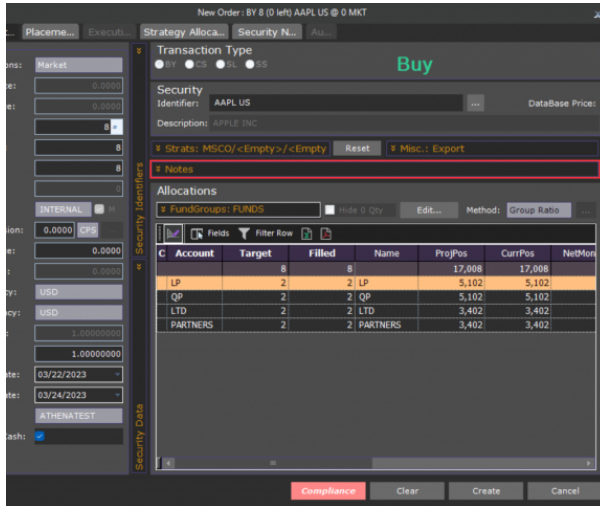
2. On 'New Order' window, you will have to add a an identifier in order to access Security Notes. We will add AAPL US on this example.



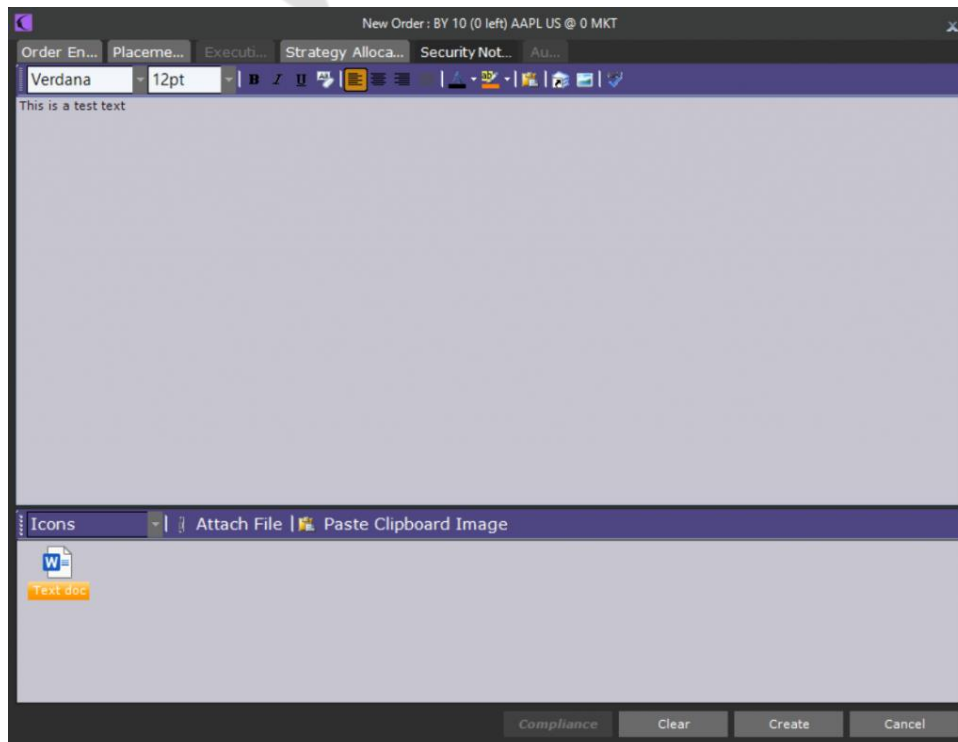
CREATING NOTES: TWO DIFFERENT WAYS

3. Once the identifier is inserted, you can write two different types of notes:

3a. Within the Order Entry tab. Simple notes with just text. *If you see many accounts with a 0 target, you can mark the "Hide 0 Qty" checkbox and they will disappear.*



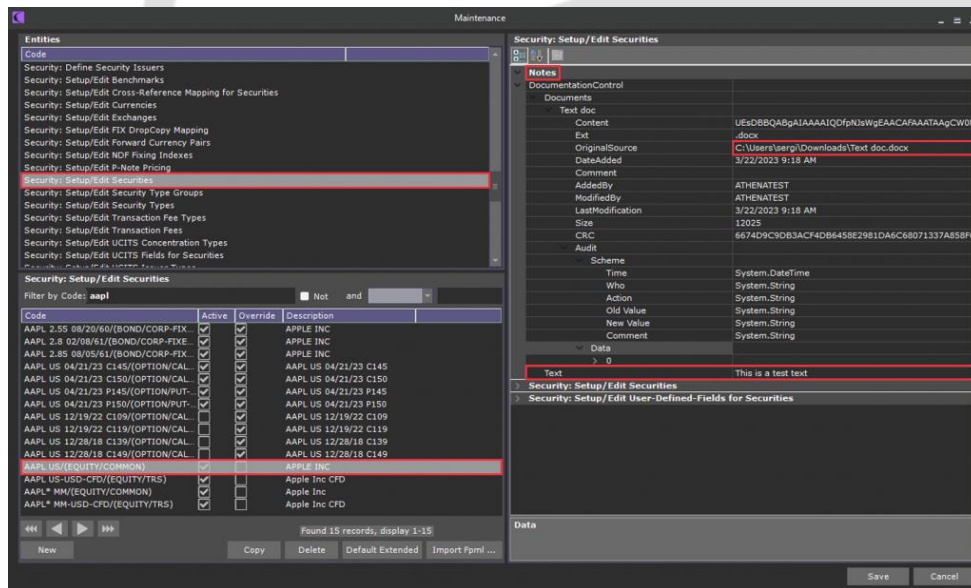
3b. Opening Security Notes tab allows you to create more complex notes, in which you can change the format and add attached files.



Traders now can check the information given in notes for a specific security by opening the order and checking Security Notes tab, or from **Open Maintenance** addin.

For this last method, open OMS tab and click on **Open Maintenance**. Within **Security: Setup/Edit Securities** search the security you just used in the step before.

On this example, we used AAPL US, so we search it and, in the right section, you will see both the notes and the attached document:



This is a helpful tool whenever you want to give extra information about a specific security (e.g. "don't buy this security"), because the note never changes unless you manually do so.

DIFFERENCES BETWEEN ORDER ENTRY NOTES AND SECURITY NOTES

Based on the previous example, from now on, every time that I create a new order for the security AAPL US, Security Notes tab will always show the text and the attached document I just added until I update them again. And the same happens with the information displayed in Security: Setup/Edit Securities entity.

On the other hand, the notes added on the step 3a, within the Order Entry tab, will only appear in that particular order. If I create a new order with the same Security, this field will be empty by default.



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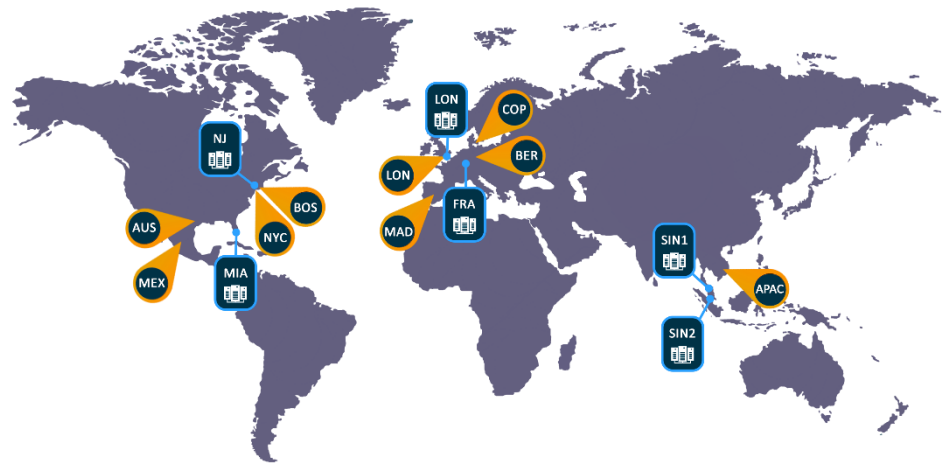
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