Fidelity Active Trader Pro® Hidden Gems

1. Hide Wash Sales from basis column in Positions and Closed Positions tool

Exclude wash sales from viewing on your Positions tool by adding one of the following Unadjusted columns: Basis, Purchase Price, G/L, or G/L %. You can add or remove columns from your Positions tool by right clicking the column header or by accessing your settings to set up default columns for your Positions. Easily drag-and-drop your columns to place them in the order you prefer.

Wash sales can be removed from viewing on the Closed Positions tool by checking the Unadjusted G/L box towards the top of the tool.

2. Heat Map - Positions / Watch List

Use the Heat Map toggle on the Positions and Watch List tool to see a visual of how securities are performing throughout the day.

Choose from multiple set criteria such as Today's G/L $, P/E Ratio, or Yield just to name a few. Also, group your positons by Symbol, Sector, or No Grouping at all.

3. View / Manage Open Orders from your Positions tool

Add the Trade Armor shield to your positions tool to easily view open order on your positions. Hover over the Trade Armor shield to manage open orders or place new orders.

Easily add the Trade Armor column to your positions tool by right clicking the column header or by accessing your settings to set up default columns for your Positions.

4. Set Custom Stock & Option trading defaults

Decrease your order entry time by setting your default trading preferences for both stock and option orders from the Settings tab in the top right hand corner of the platform. You have the ability to set a default trading account, ticket, and trade type. Dive even deeper and enable a default quantity, order type, TIF, Condition, and Preset Buy/Sell limit.

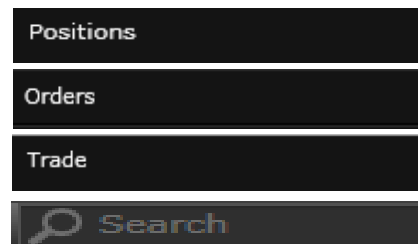## 5. Take advantage of keyboard shortcuts to increase navigation speed

Use hot-keys to quickly navigate ATP tools:

Ctrl + P to launch positions
Ctrl + O to launch orders
Ctrl + T to launch default trade ticket
Ctrl + F to move cursor into the search bar

Up/down arrows on the keyboard can be used to increase limit orders or share quantities on the trade ticket.

6. Pre-fill trade tickets by selecting Bid/Ask

Prefill trade tickets by selecting a Bid/Ask price from a range of tools including Quotes, Watch List, Option Chain and Trade Armor.

7. Create or cancel multiple orders

To create more than one trade at a time, select multiple rows from a Watch List or Positions tool by holding the Shift or Control key and left-click on the rows. Use Control + Click to select individual rows and Shift + Click to select a group of rows. Then right-click and choose Trade from the available options to send them to the multi-trade ticket.

To simultaneously cancel multiple orders in the orders tool, use Shift + Click or Control + Click to select the orders you want to cancel. Then right-click and choose Cancel Orders from the available options
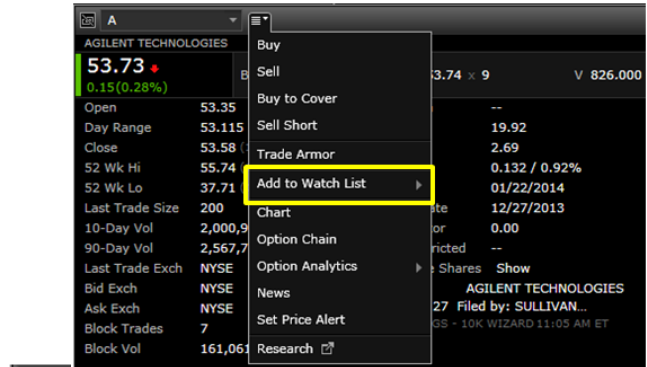
8. Customized Watch Lists

Add a symbol to your custom watch list directly from the Quote, Chart, Filters and Option Chain tools using right-click or the symbol action menu.

Quickly edit symbols in your custom watch list by using the overwrite feature. Simply click once into the symbol field, type the new symbol and click out or hit enter to save your changes.

Right-click on a column header to add or remove columns and customize your view. You can also drag-and-drop columns to reorder them.
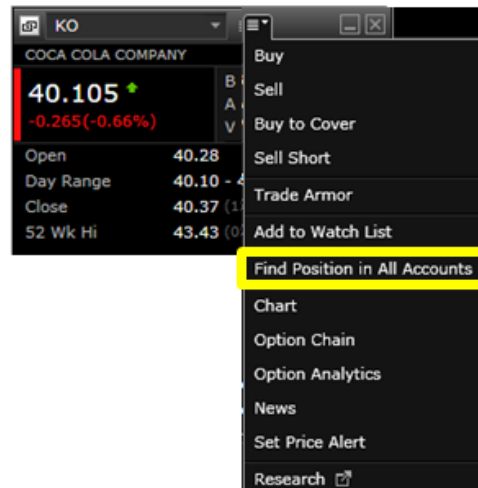

9. Use the Find Position in All Accounts feature to identify and quickly sell a security across multiple accounts

From the Action Menu select Find Position In All Accounts, which will only display for securities you own. Use the Close All button to launch the multi-trade ticket, which will be pre-populated with your positions in that security.

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10. Use sidebars to maximize screen real-estate

Enable sidebars from the Settings Menu Select General and then select the sidebar layout you prefer: left, right or both. Once enabled, you can easily drag-and-drop tools such as Quotes, News, Alerts, and more into the sidebars. Tools automatically resize when dropped into a sidebar. Select the arrow to open or close the sidebar.
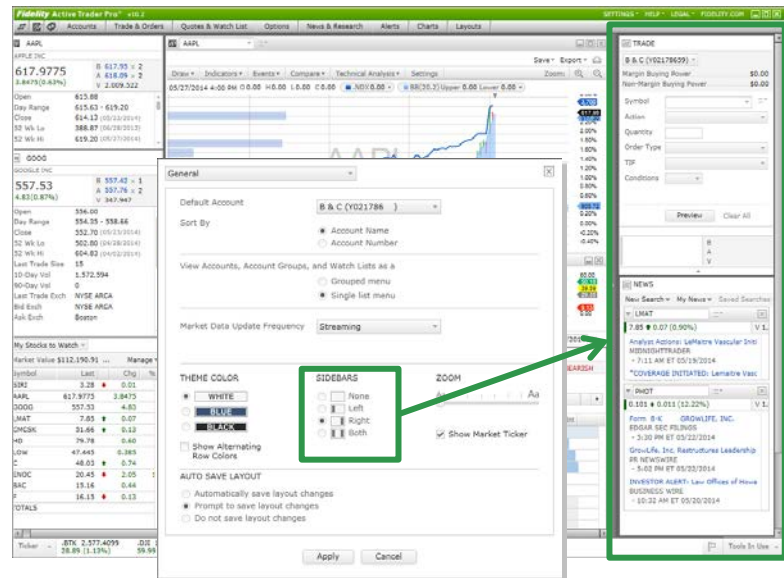

11. Float individual tools outside of the ATP platform and onto other monitors (ATP desktop version only)

Right-click in a tool and select Float Window to place that tool outside of the ATP platform. Return it to the platform by right-clicking and selecting Dock Window. Hold down the Ctrl key to open a tool from the main menu in Float mode.

12. Shortcuts provide quick access to Trade, Orders, & Quote tools

Shortcut icons are located to the left of the main navigation toolbar. Use them to launch the Trade Ticket, Orders, and Quote tools with one click.
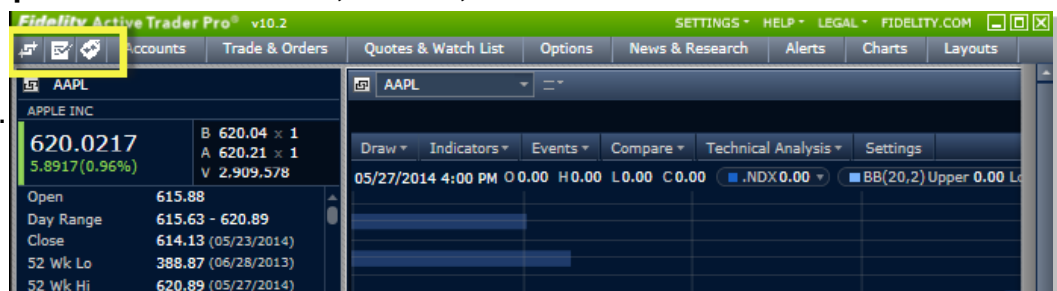
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13. Use customized chart tabs to quickly navigate views on different timeframes, frequencies and indicators

Create multiple views within a single chart window. Customize each tab by choosing different timeframes, frequencies and indicators.

Add tabs by selecting (+) an empty tab, or delete tabs by clicking (x). Reorder by dragging and dropping, double click on the tab name to rename it.


14. Customized Quotes

Rearrange data fields using drag-and-drop. Right-click to add or remove fields. Re-size the quote tool to your desired height and width for a one-to-multiple column view.

15. Quick access to tools via the Action menu and right click

Wherever there is a symbol there will be an Action menu giving you quick access to seed that symbol into another tool. Or you can use the right-click menu to trade or seed other tools.
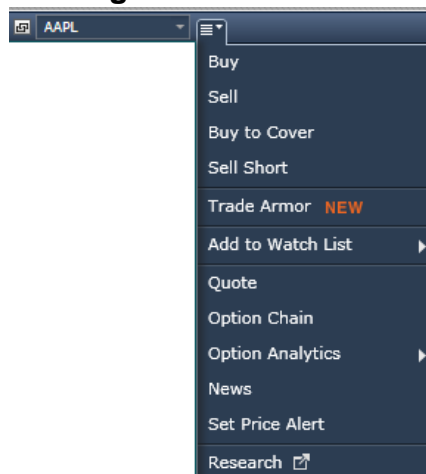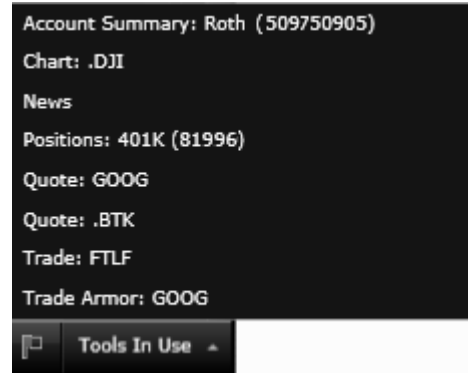
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16. Quickly view, restore or close open tools

Use the Tools in Use menu located in the lower right corner of ATP to see a list of all open tools. From here you can bring a tool into view or easily close a tool by clicking on the red [x] to the right of the tool name.


17. Total Account Value Tool tip on Positions

Hover over the Total Account Value in the Positions tool to view expanded real-time balance information including any pending debits or credits for the account.
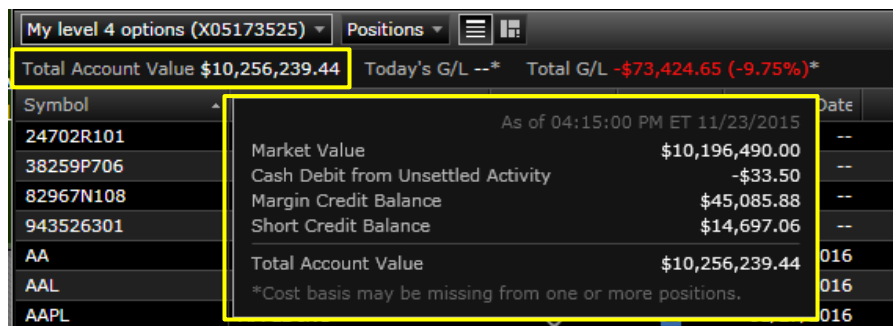
18. Give your feedback to help us shape the future of active trading

Tell Us What You Think is a way to provide feedback about the Active Trader Pro Platforms. Also, be sure to access Things to Know About ATP in the same menu for additional tips and access to the ATP User Guide.
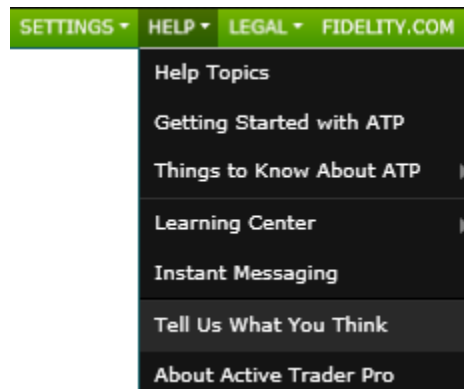
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19. Create Duplicate Order

To duplicate an order you have already placed, simply right click on the order you would like to copy in the Orders tool and select Create Duplicate Order. The order details will feed into the trade ticket allowing you to quickly place the same trade.

20. Create Custom Option Filters

To make your own custom option filter, select the pre-built filter drop down and choose "custom". Once the box appears choose "create", this will launch the custom scan builder allowing you to pick your criteria, values, and sort order. Watch the demo video on the same page to get a quick tutorial of how to build your scan.

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