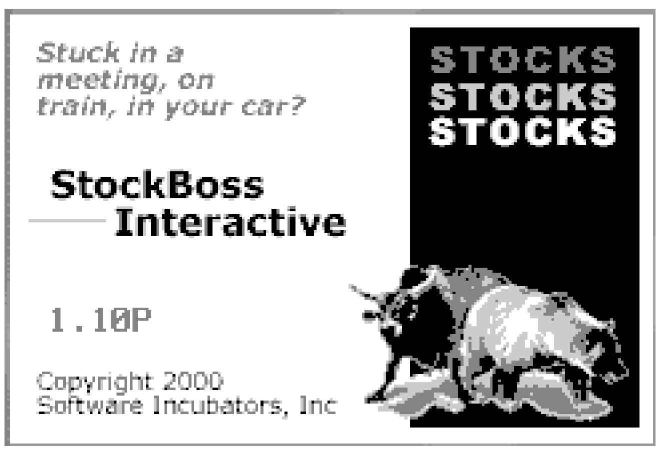
StockBoss Interactive

For

Pagewriter 2000x/Timeport P930 Series

User's Guide



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STOCKBOSS LICENSE AGREEMENT

1. Introduction

1.1. Minimum Requirements

1. PageWriter 2000x or Timeport 930/935 with Flex OS version 2.0.0.14 or later. To check the version of FLEX OS on your unit, launch the "Customize" or "Controls" application, and then select "About PageWriter". If your pager is Flex OS version 1.0x we recommend installing our older version available at www.stockboss.com/sbia_pw106.exe or upgrading your pager to Flex OS version 2.X or higher.

2. At least 40 K bytes of open FLASH memory on your PageWriter/Timeport. To check the free FLASH memory on your unit, launch the "Customize" or "Controls" application, select "Memory Usage", and if necessary (depending on version of FLEX OS), select the "Advanced" button.

3. FLEX PC Partner for your PC, version 2.0.0.14 or later. To check the version of PC Partner, launch PC Partner, then select "Help" in the main menu bar, and then select "About Partner".

1.2. Subscription Plan

When you first set up StockBoss on your PageWriter/Timeport, you will normally be given a two-week free trial period. After this trial period, StockBoss services are offered to subscribers for a monthly subscription fee. The current subscription fee structure can be found at www.stockboss.com.

1.3. Overview

StockBoss is a powerful financial interactive application that utilizes the graphic capabilities of the Motorola PageWriter 2000X and Timeport pagers to provide the end user with access to their stock portfolio and market information. In addition, StockBoss Interactive allows the user to visually graph historical stock data directly on their pager in order to portray a complete market status.

Based upon the unit's two-way communications capabilities, StockBoss provides sophisticated navigation of financial data, plus allows for on-demand requests for new financial information.

Users can access their stock portfolios directly from the pager, tracking history in chart form, in addition to the receipt and request on demand of stock information. Receipt of quotes and updates are available, customized to individual user preferences, as well as the interactive option to request "on demand" specific market information. StockBoss Interactive is an ideal financial resource for mobile users of interactive pagers who track market performance during the trading day. Moreover, StockBoss users have the unique option of modifying and maintaining their stock portfolios directly from their pager, without ever having to access the Internet. This convenience allows complete freedom and customized use to meet the needs of the mobile investor.

2. Installation

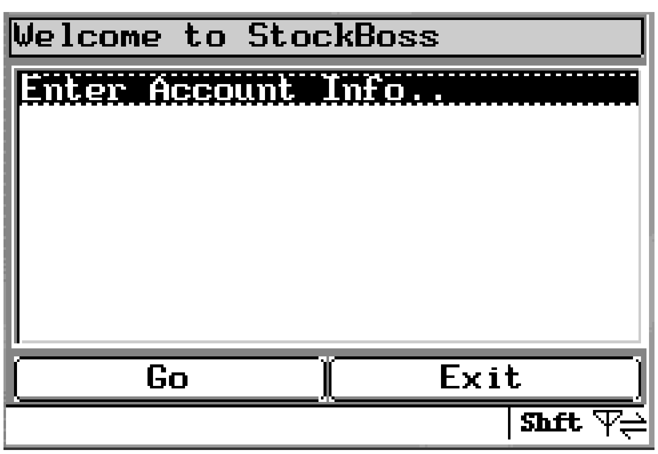
Execute the install script **sbia_pw.exe** and follow the instructions on each screen. If you are upgrading from a prior version be sure to remove the older copy as instructed and reboot the pager.

IMPORTANT – Be sure to RESET your unit, both BEFORE and AFTER installing StockBoss. To do so, use the "Power Off" application on your unit or hit the Alt-Home keys, and then select any key to reboot the unit.

IMPORTANT – Wait for your pager to return to 2 way service mode before starting the StockBoss application.

After successful installation the main application wheel or desktop will contain the StockBoss item. To begin using StockBoss select this item.

3. Enter Account Information

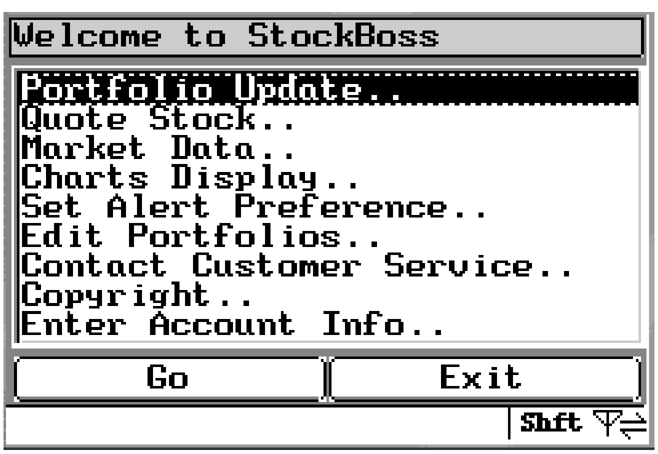


The very first time the application is launched from the wheel, the main StockBoss menu will contain only one item. In order to enable the rest of the features, you must select the item from the list and proceed to the following screen:

You must enter a valid first and last name. StockBoss reserves the right to discontinue any account that does not contain a real name. Each name cannot begin with a space. The Company, Phone and Home Email fields are optional.

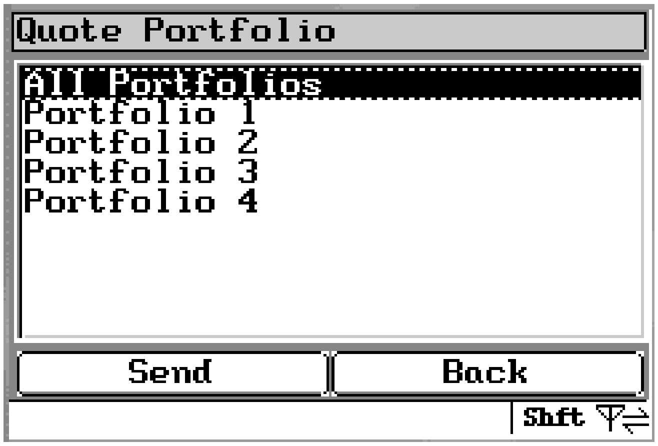
The Home Email should be the address of a desktop email account (DO NOT ENTER THE EMAIL OF THE PAGER) at either an office or home. StockBoss will send a copy of messages as well as a Welcome message with the account ID and password to this email address if the user so desires. See the Preferences section for more information.

4. Main Screen



After account information has been entered, and each subsequent time the application is launched, the full menu will appear.

5. Quote Portfolio

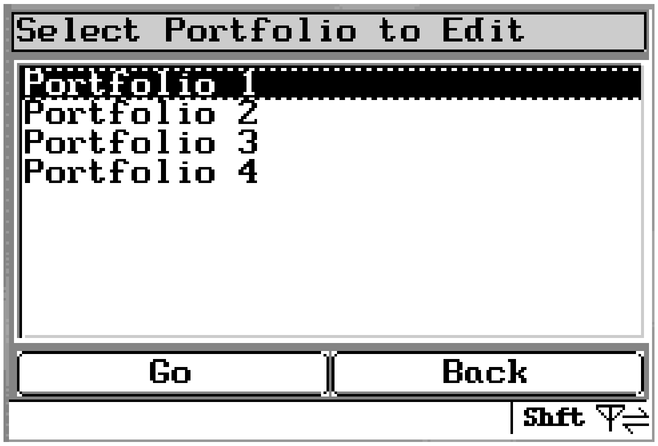


If this is the first time the application is run, it is recommended that you request a Portfolio Update. If you already have a StockBoss account, then the Update request will return the current prices and add all existing stocks to the portfolios stored on the pager. If you do not yet have an account the pager will send information to the StockBoss server that will enable a new trial account.

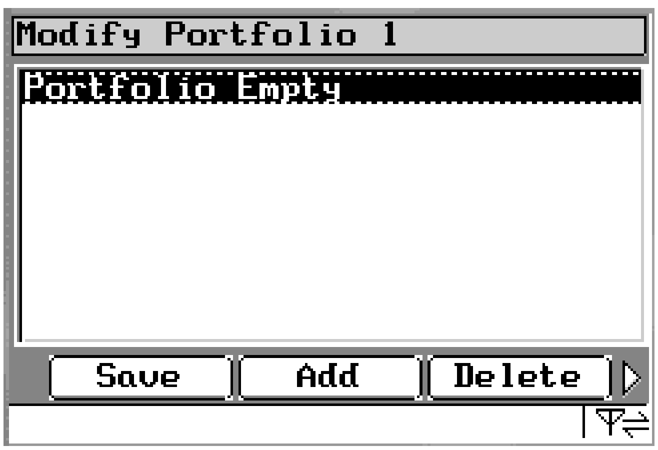
The "Go" button will place a message in the Read module outbox folder which is addressed to the StockBoss servers. Wait for the portfolio update message to be returned before proceeding. If you are creating a new trial account you will also receive a welcome message with your account ID and password to the StockBoss servers. If you are in an area of good coverage, this should normally take 2 minutes or less.

Portfolio Updates may be requested at will, 24 hours a day.

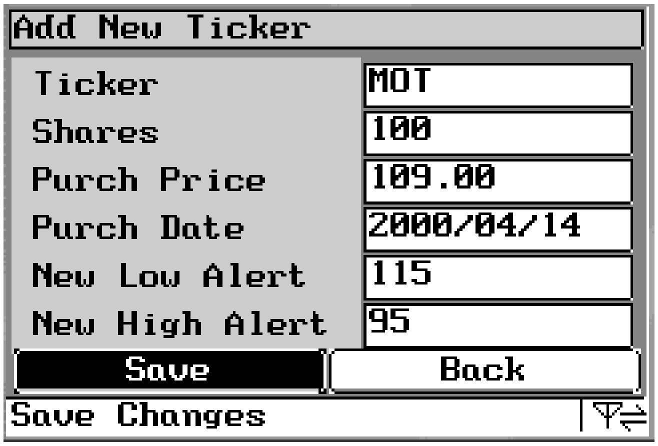
6. Edit Portfolios



StockBoss supports four portfolios per account. Each portfolio may hold up to 75 stocks. To add or edit any of the four portfolios, select the Edit Portfolio option. Next, select which portfolio to modify.

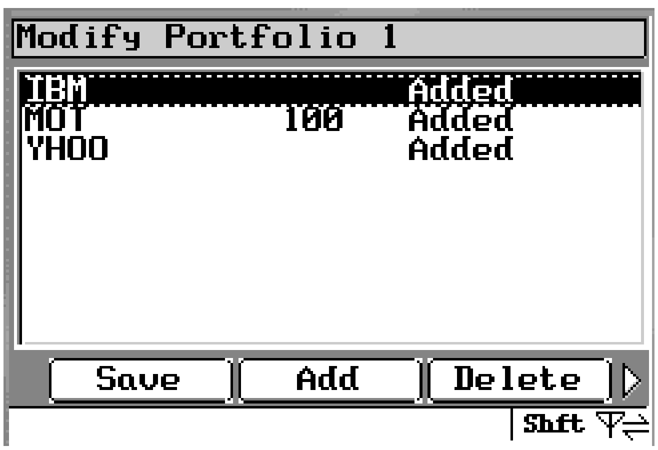


If there are no stocks listed in the selected portfolio the software will indicate that the portfolio is empty. Tab to the menu bar and select the Add option to insert a new ticker into the portfolio.



In the Add Ticker screen only the ticker symbol itself is required. All other items are optional. Note: The format of the Purchase Date field is YYYY/MM/DD. Any other format will not be properly understood by the software.

After entering the desired information, select the Save button. This will add the information to the local portfolio list on the pager.



After adding one or more stocks the portfolio list will display the ticker, any shares entered and the Added status. IN ORDER TO UPDATE THE SERVER, THE SAVE OPTION MUST BE USED before returning to the main menu.

Each portfolio may hold up to 75 stocks or items at any given time. However, it is recommended that only 10 stocks at a time should be added between saves to ensure that the historical data returned is fully received, this is dependent upon the pager carrier's message size limit. Simply return to the Edit Portfolio screen to add additional tickers to your portfolio(s) after a save.

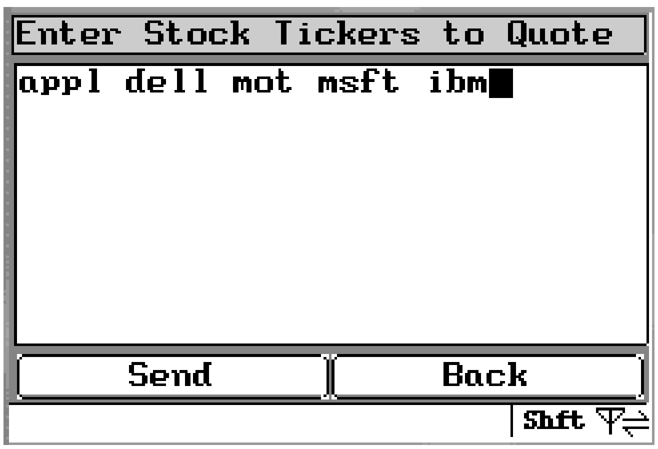
To edit a ticker, using the Nav button to highlight the desired ticker (or hit the first letter of the ticker symbol on the keyboard) and either hit the enter key, or tab to the menu bar and select the Edit option.

The Edit screen appears similar to the Add Ticker screen, with the exception that the ticker symbol cannot be modified. If any changes are made to the fields and those are saved, the status for that ticker will now state 'Changed'.

To delete a ticker, use the same procedure as above the select the ticker, then tab to the menu bar and select the Delete option. The status will change to Deleted, but the ticker is still listed. To Un-delete the ticker, again select the ticker, tab to the menu bar and select the Delete option. The status will revert to the blank, added, or changed status.

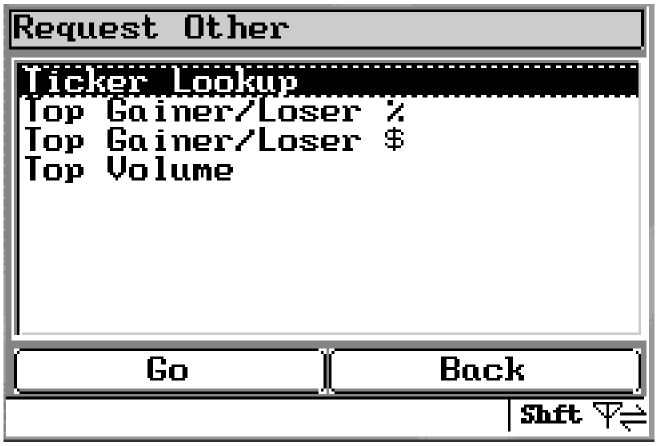
TO UPDATE THE SERVER after any additions, changes or deletions, select the Save menu button.

7. Request Stock Quotes

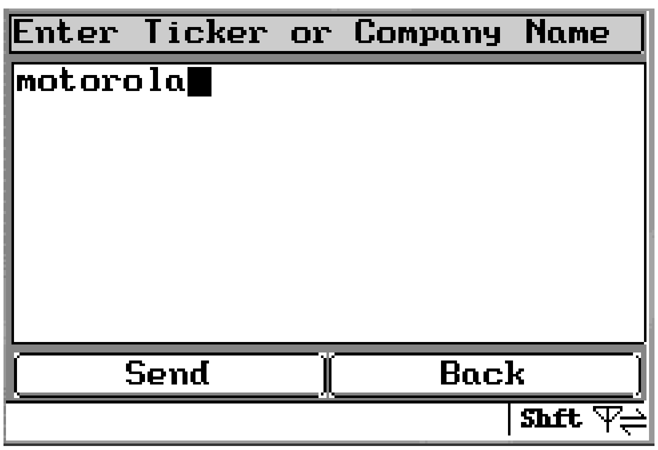


To request stock quotes on specific tickers rather than on the entire portfolio, use the Quote Stock… menu selection. Enter a list of tickers separated by spaces into the entry box, tab to the menu bar and select Send. The list of tickers is retained so that the next time the form is displayed the prior list of tickers will be shown. To modify the list use the Nav button and backspace keys to delete any undesired tickers or add others.

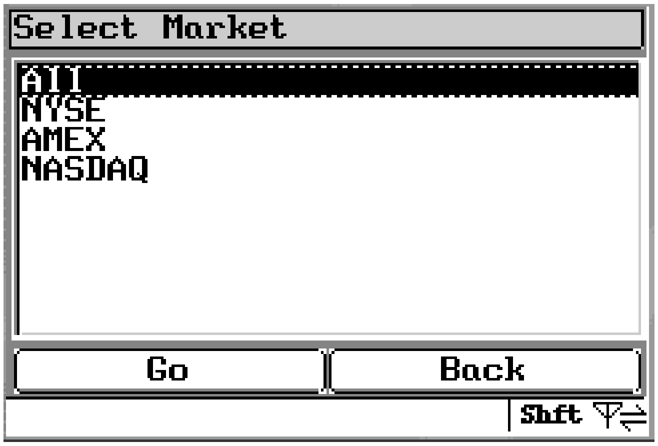
8. Request Other Market Data



In addition to specific ticker quotes, and Portfolio Updates, the user may request other market data such as current top Gainers/Losers by percentage or by dollar, Volume leaders, or the ticker symbol of a company.

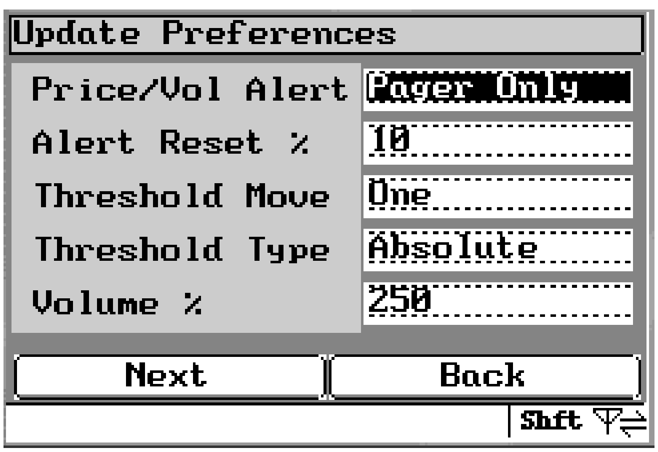


To find the ticker symbol of a company or the company name of a ticker symbol use the Ticker Lookup option. Enter ONE name or symbol per request. If entering a name it is preferable to use only a portion of the full name. Entering a partial company name will retrieve a broader list of results and companies. The StockBoss server will attempt to find the partial name within all company names and will return the first 10 matches found.



If requesting gainer/loser or volume leader information, the user can optionally select a specific market such as the top leaders in the NASD, the NYSE or the AMEX specifically.

9. Setting Preferences



User preferences are set on two screens. The following options are listed on the first screen:

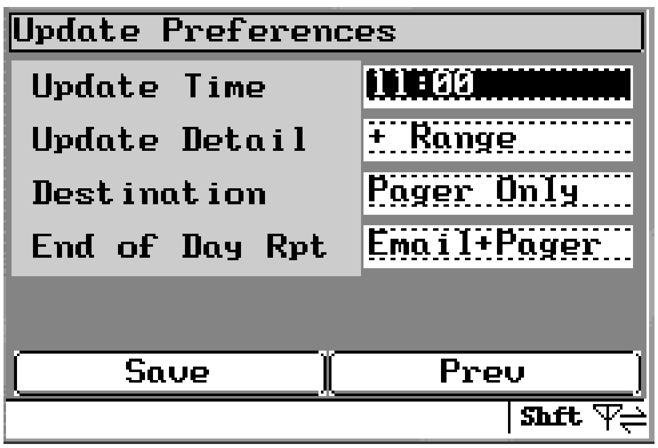
Price/Vol Alert Dest: The price and volume alerts generated by the StockBoss server can be delivered to the pager only, the Home Email only, both or neither (Off).

Alert Reset %: Following a price alert the thresholds are reset based on the percentage listed. In this example, an alert will be generated every time one of the stocks in your portfolio has a change in value of 10% or more.

Threshold Move: Following a price alert the triggered threshold is always adjusted, and the other threshold may also be changed if the 'Both' option is selected.

Threshold Type: If set to Absolute the thresholds are only changed by a price alert, or by manually changes in the Portfolio Edit screens. If set to Intraday, the thresholds are reset each morning based upon the prior day's closing value.

Volume %: Controls how high over the 10 day trailing average the current volume must be before triggering an alert. For example, if 250% is selected, you are specifying that you wish to receive a notification message from StockBoss whenever one of the stocks in your portfolio has traded at a volume of 250% or more of it's average trading volume. If set to Off then no volume alerts will be generated.



The second screen has the following parameters:

On this screen the user can specify the instructions on how and when they want to receive notifications and updates from StockBoss.

Update Time: A portfolio update message is automatically generated by the server at the time (Eastern US Time) listed. This field is used to specify the time that you would like to receive the Mid-Day portfolio. Note: Portfolio Updates may be requested manually at any time from the main menu.

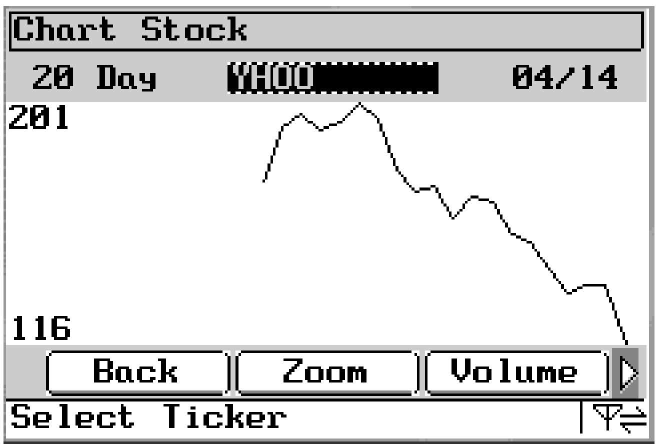
Update Detail: The portfolio updates and requested stock quotes will always contain the last price, change for the day and the volume. In addition, the high and low (+ Range) and/or the bid and ask prices (+ Bid/Ask) may be included or all (Both). In order to display candle charts, the +Range or Both option should be selected.

Destination: Indicates if the timed update should be delivered to the pager only, Home Email only, both or neither (Off)

End of Day Rpt; At the end of the market trading day an End of Day closing summary message is sent to the destinations selected. Note, to ensure the charts are updated the end of day report should be left on.

In order to save any changes the user must proceed from the first screen to the second and then select the Save option.

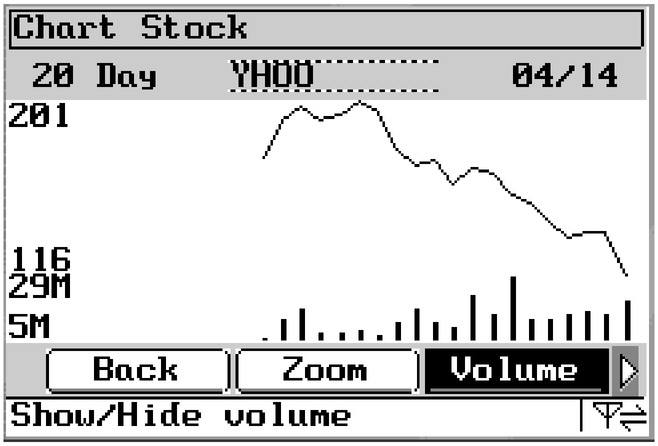
10. Charts



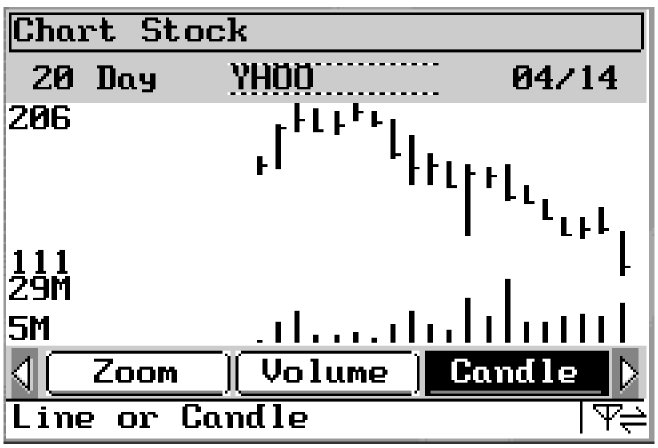
To view historical charts of the price and volume select the Charts Display… option from the menu. Initially a basic line chart will be shown. Each chart displays the number of days worth of data in the upper left corner and the last date in the upper right corner. The selection box in the middle is used to display the ticker symbol.

To change between tickers use the Nav button to select up or down through the list. When the Nav button is used the charts will automatically update to the new ticker. The keyboard may also be used to select a new ticker by hitting the first letter of any ticker in any of the portfolios. However, the chart will not automatically update. Press the Enter key to have the chart displayed.

If an incoming message arrives while viewing the chart, or you hit the Alt-Smbl keys, the chart does not refresh automatically when dismissing the pop up dialog box. Press the Enter key to have the chart redrawn.

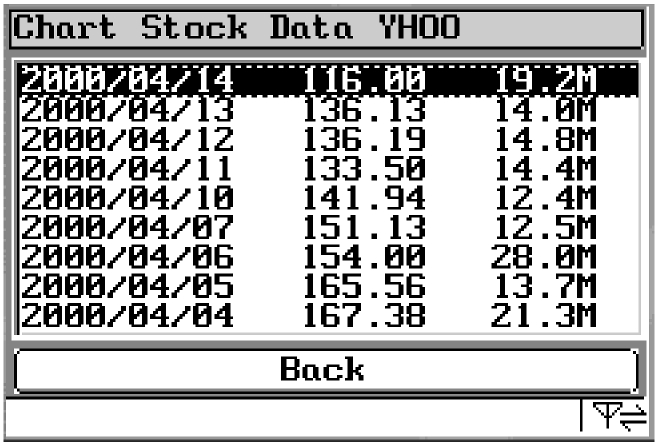


In addition to the basic line chart, the volume bars may be displayed or hidden using the Volume menu button.



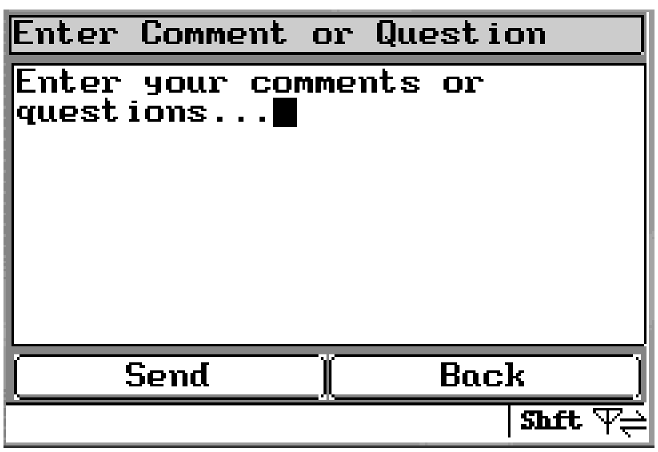
The basic line chart can be changed to a candle chart and back using the Candle menu button. Note, the +Range or Both option should be selected in the Update Detail preferences in order to receive the high and low prices necessary to create the candle view.

The charts will show up to 60 days of historical data. Use to zoom bottom to switch between a 30 day and 60 day view.



The data behind the chart can be viewed by selecting the Data menu button.

11. Sending Feedback

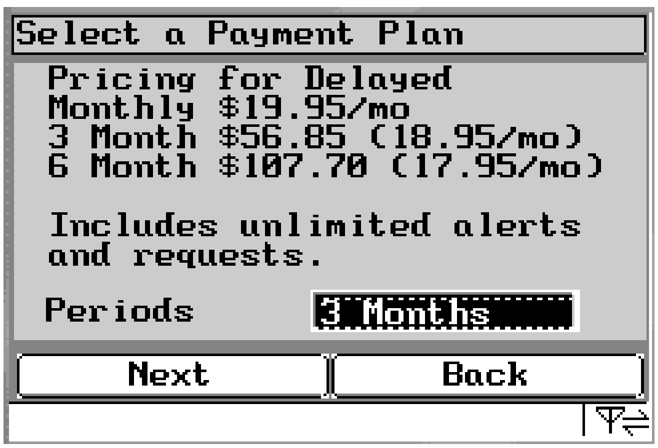


If you have any comments or questions about the StockBoss service or the PageWriter/Timeport application, the Contact Customer Service screen can be used to direct a message to the StockBoss staff.

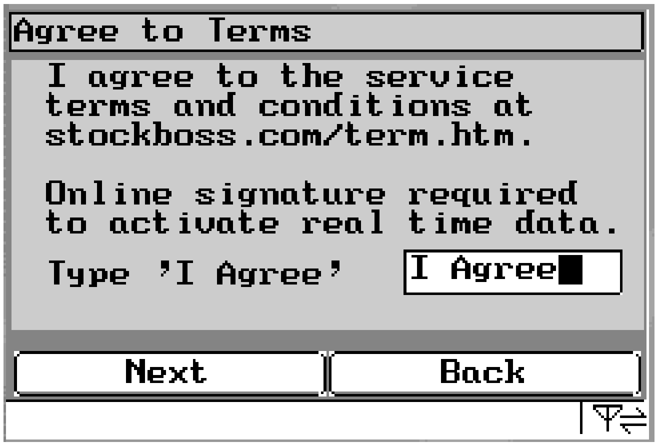
12. Requesting Subscription

Each user is granted a complimentary two-week trial. If you wish to continue service after the trial period or upgrade to full service during your trial, you may convert your account using the Subscribe screens. The subscription process is broken into 5 screens that allow for selection of data type and payment periods, and input of address and credit card information.

The first screen allows you to select between receiving 15 minute delayed or Real Time market data.

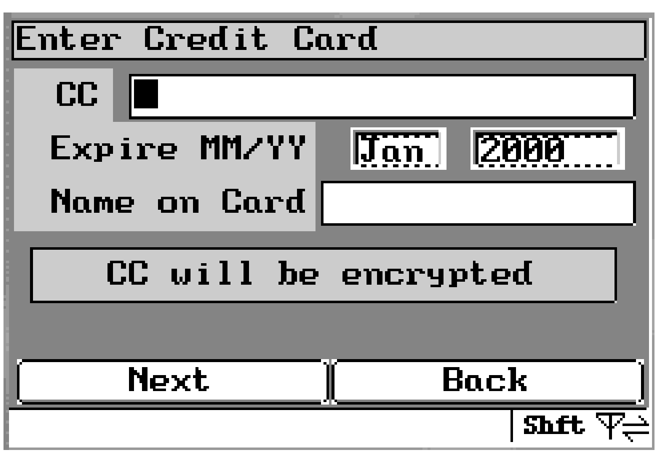


The second screen prompts you to select a payment plan with the number of months to prepay. **The subscription will automatically renew and you will be charged the amount shown at the beginning of the next period.** The prices displayed indicate the selection of delayed or Real Time data. Note: the prices listed for real time data are for individual non professional users. If you are uncertain of your status you should contact StockBoss using the Contact Customer Service menu option or view the definition of professional versus non professional as listed on our website at www.stockboss.com/prononpro.htm.



The third screen requires you to enter the text 'I Agree' to indicate your acceptance of the service terms and conditions listed at the web address shown.

The fourth screen prompts you to enter your address information.



The final screen prompts you to enter your credit card information. StockBoss accepts Visa, Mastercard and American Express. You may use numbers, spaces or dashes in the card number only. Your credit card information will be encrypted before it is sent to our server.

Once your subscription information is received and processed you will receive back a confirmation message. If you selected Real Time data the message will direct you to login at www.stockboss.com in order to complete the Online Real Time Agreement forms required by the exchanges. Data delivered to the pager will continue to use delayed information until the agreements are completed.

13. StockBoss Folder

Under Flex 2.0 all incoming messages for the StockBoss application including portfolio updates, quote request, price and volume alerts will be directed to the StockBoss Folder within the Read module. If you choose not to read a StockBoss message immediately upon arrival, select the Read application and then scroll to the StockBoss folder and hit enter to view the list of messages.

If you wish to customize the alerts played when a StockBoss message arrives, highlight the StockBoss folder from the Mailbox list, then tab to the menubar and select the "Custmize" option. DO NOT change the name of the folder or the routing routes, but tab to the Next-> button to view the Set Alerts screen. Here you may select different tones for each of the three alert modes. You may also continue to the Cleanup Options if you wish to change the default options for removing old messages and continue to the Reminder Options screen to change those setting.

To add automatic routing of messages for Wisdom 4.0 select the Read module, tab to the menu bar and select Message rules. Select new rule. Type :dl into the 'If message contains' text box and tab to 'Store In'. Select StockBoss. You may turn on or off the beep and pop up option also. Tab to the menubar and save the rule. Repeat the steps above with the rule text :Re. Note the dl are lowercase and the R in Re is uppercase.

14. P935 Compatibility

The StockBoss application is not beamable. It must be installed using the full script provided. The application does not use the Help subsystem and is not listed in the Find screen list of applications. Other than these issues the application is fully compatible with the P935 / OS 4.0 software.

15. Troubleshooting Guide

When trying to install the application with Partner, the progress bar stops before the installation is complete. Why?

This usually means that there is not enough memory on the PageWriter/Timeport. Here are some tips to free up memory:

1. If you haven't already done so, reboot (power off and then on) the unit.
2. Make sure StockBoss has already been removed from the unit. Use the "Customize" application, and then "Delete Applications"
3. Clean up unnecessary messages. Use the "Read" application, and then delete messages from the Inboxes and folders. When you are finished, be sure to empty the Trashcan in the "Read" application and/or the Desktop Trash.

I requested a portfolio update or stock quote but never received a reply. Why not?

It may take up to 3 minutes for the server to receive the message and send back the reply messages to your unit. If this hasn't happened within 10 minutes, most likely the request message wasn't successfully sent from your PageWriter/Timeport. Check the "Read" application's Outbox, to see if the last message has been sent (look for the check mark next to the message). If it has not been sent, tab to the Menu bar and select the Resend button.

I didn't receive my intra-day (or end-of-day) update. Why not?

Most likely the message was not received properly by your unit. The FLEX-based paging network will be notified and will retry sending a message if it is not received properly, and the FLEX frameworks on the pager will try to reconcile garbled messages into a perfect message. However, occasionally these attempts will fail, especially in areas of marginal coverage.

Occasionally the screen seems unresponsive. Why?

This usually means that a new update message has arrived and is being processed.

After viewing my Portfolio Update message the pager says the message has transmission errors. Why?

There is a known minor issue with the software. This warning can be safely ignored. Just hit enter to continue operations.