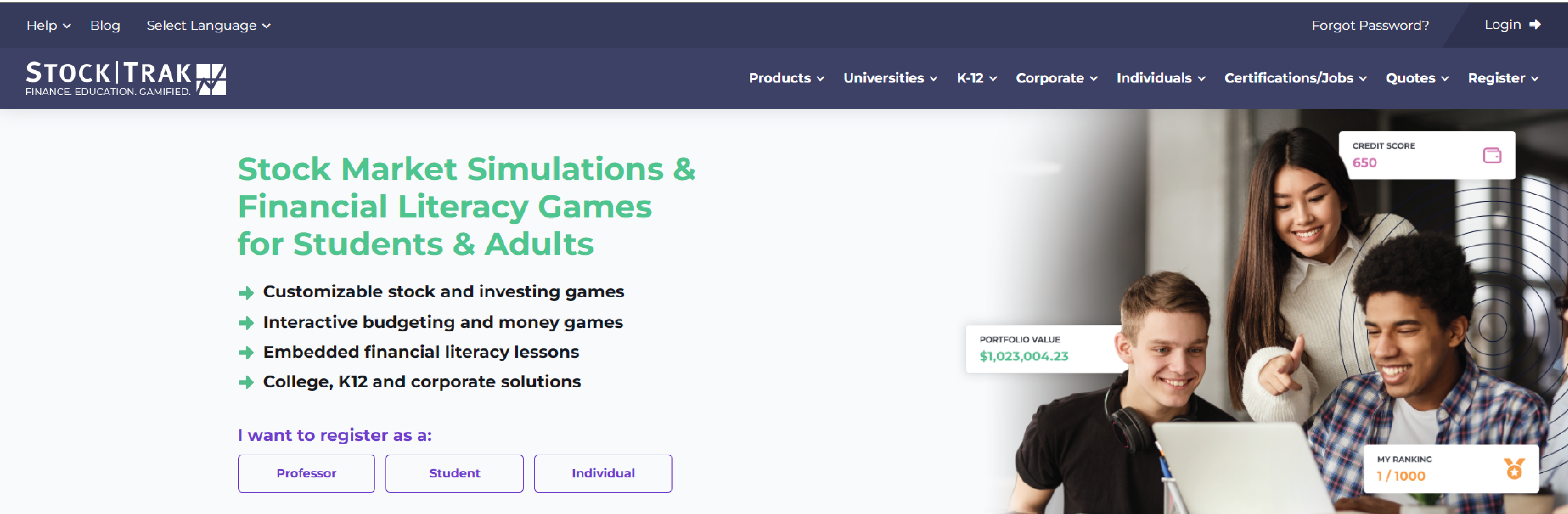
TUTORIAL
CREATE NEW SESSION

STOCK|TRAK HOW-TO GUIDES

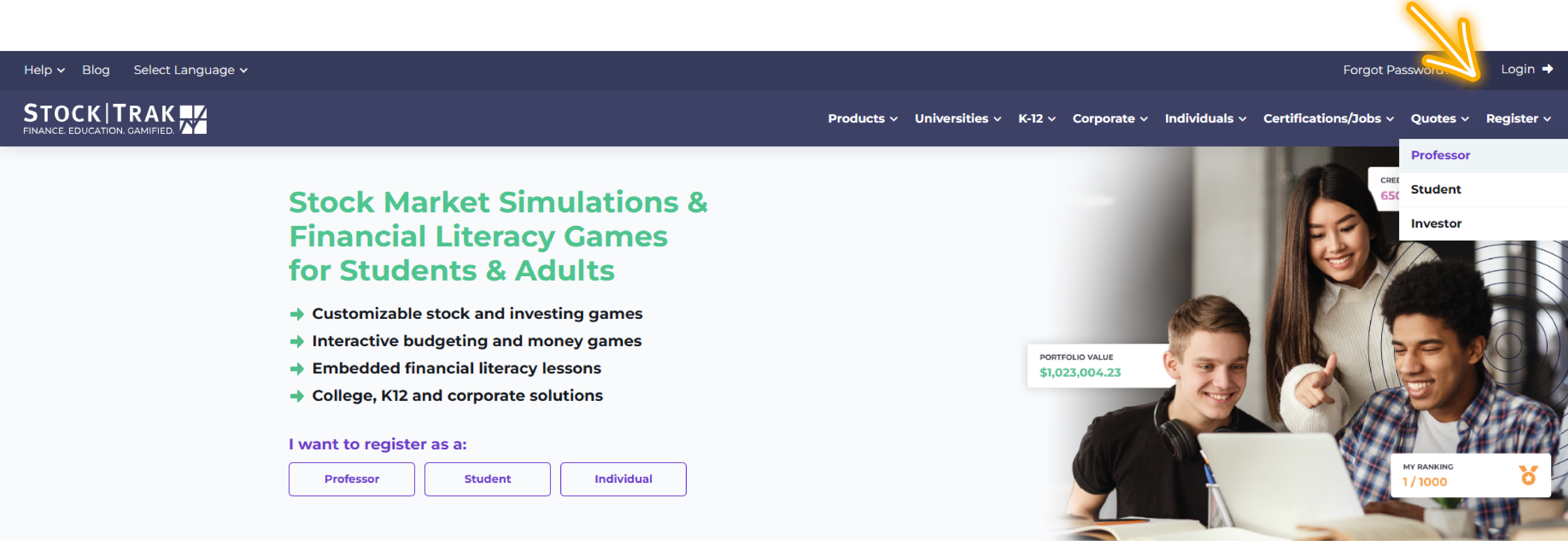
PROFESSOR ACCOUNT

Register for your free account on StockTrak.com, or Login with your professor account.



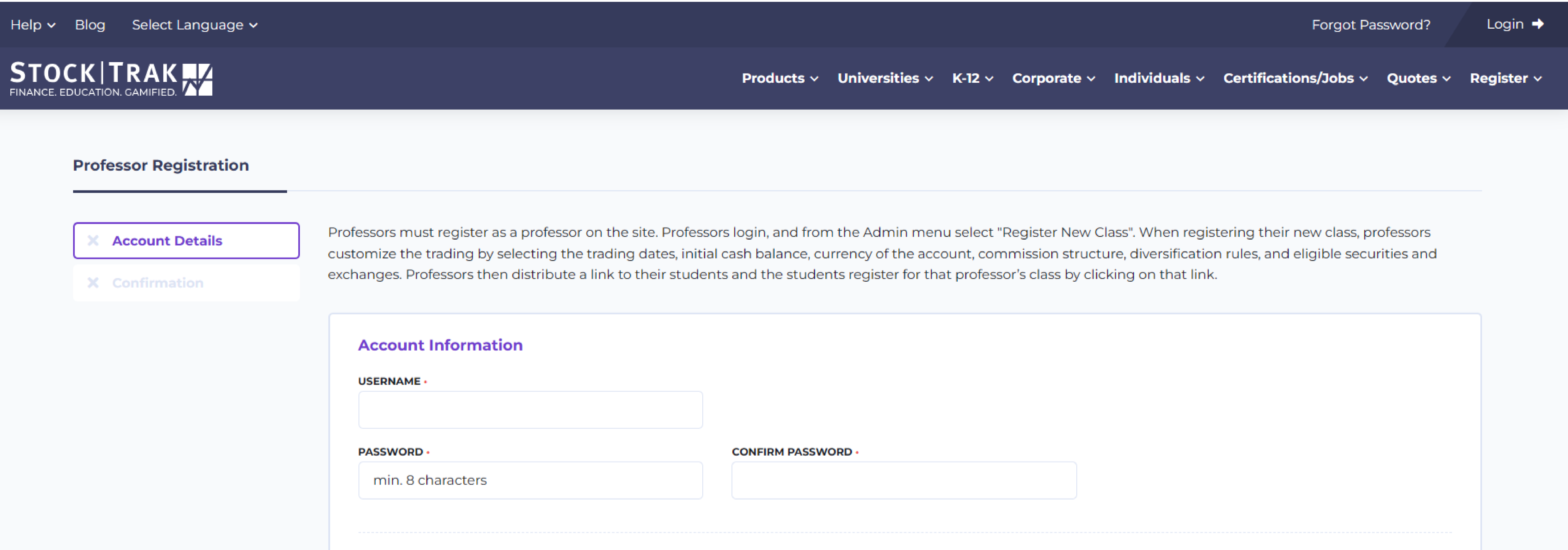
PROFESSOR REGISTRATION

Click, Register and select Professor.



PROFESSOR REGISTRATION

Fill-out the form, click **Next** at the bottom of the page.



PROFESSOR REGISTRATION

Click, **Create New Session**.

STOCK|TRAK
FINANCE. EDUCATION. GAMIFIED.

Products | Universities | K-12 | Corporate | Individuals | Certifications/Jobs | Quotes | Register

Professor Registration

- Account Details
- Confirmation

Your user account has been successfully created!

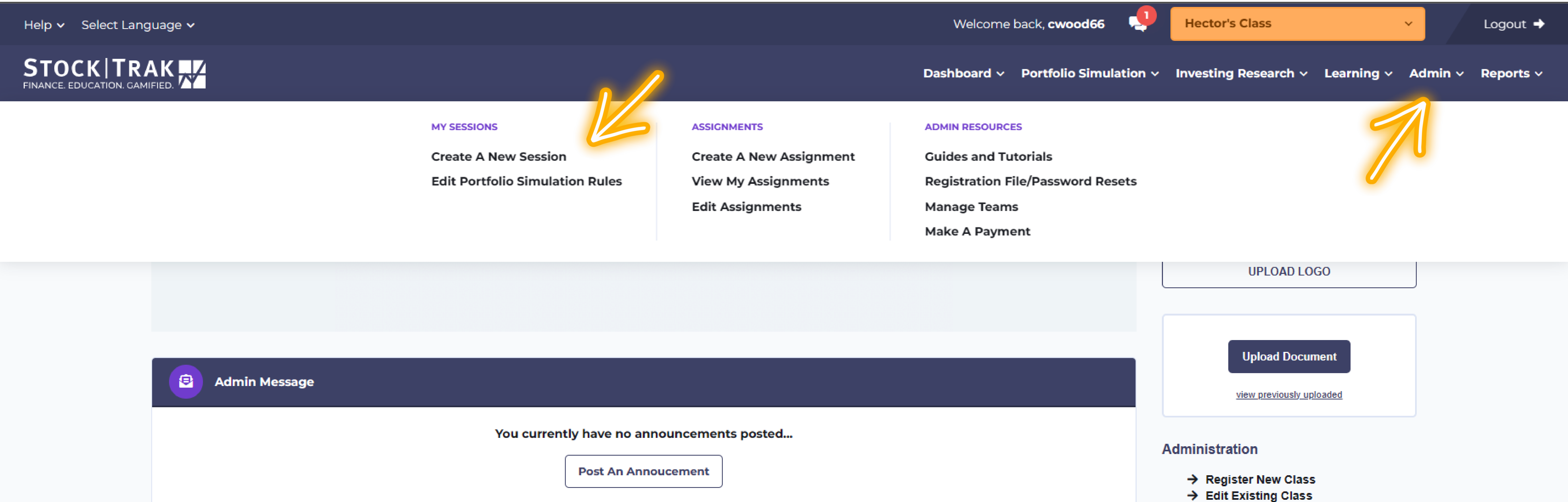
Your Stock-Trak profile has been created with the information below. Please review it carefully. You will be able to edit this information at any time in the future. Your registration information has also been sent to your email **cwood@stocktrak.com**.

In order to get started, cli the button below.

Create New Session

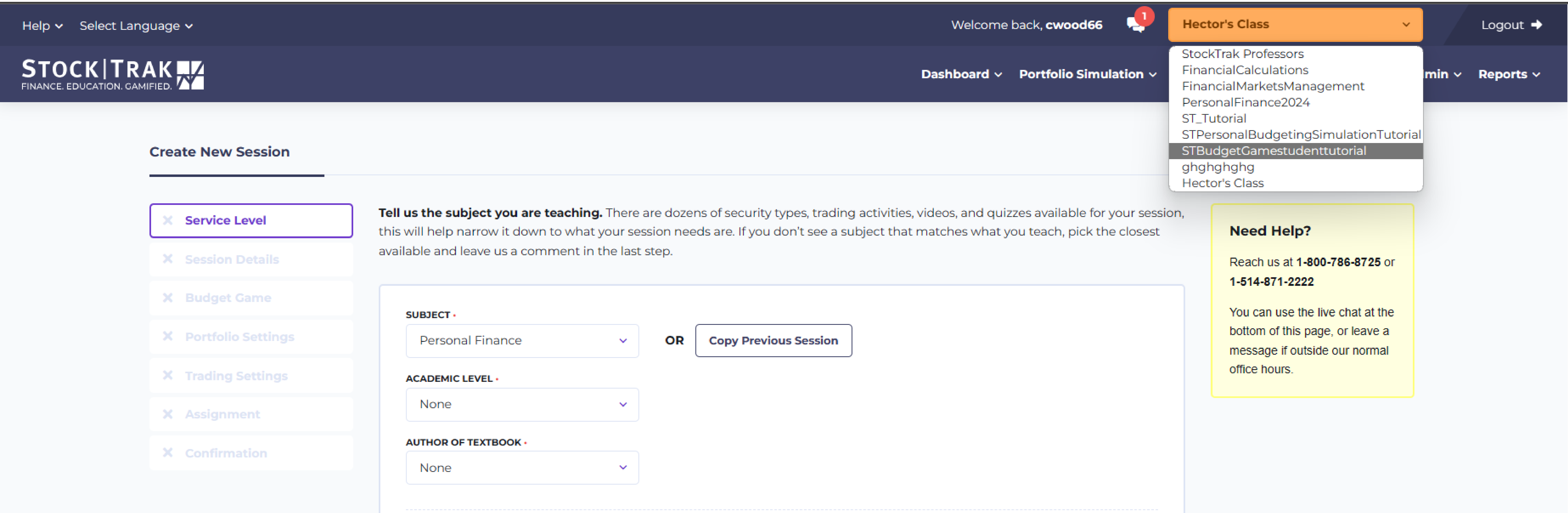
CREATE NEW SESSION

Go to **Admin** on the Main Menu,
Click **Create a New Session**.



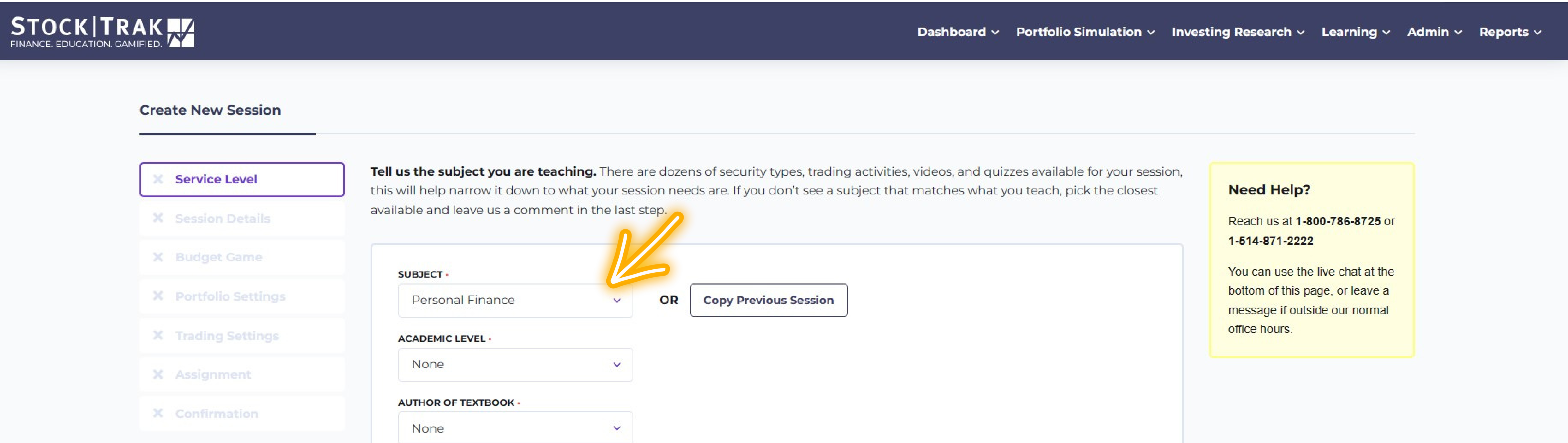
UNLIMITED CLASSES!

Toggle between classes by clicking the orange button on the top menu.



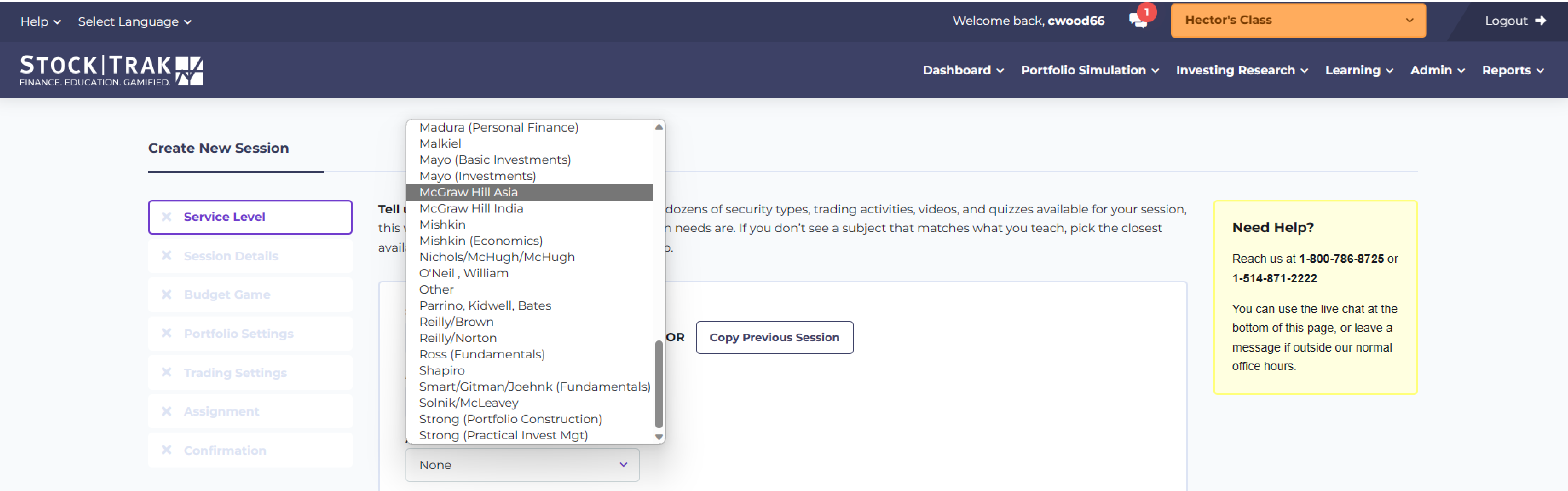
SERVICE LEVEL OPTIONS

To get access to the Budgeting Game, select **Personal Finance.**
Click **Investments** or **Portfolio Management** to access all securities and exchanges.



TEXTBOOK PROMO CODE

Select the author name from the dropdown menu.

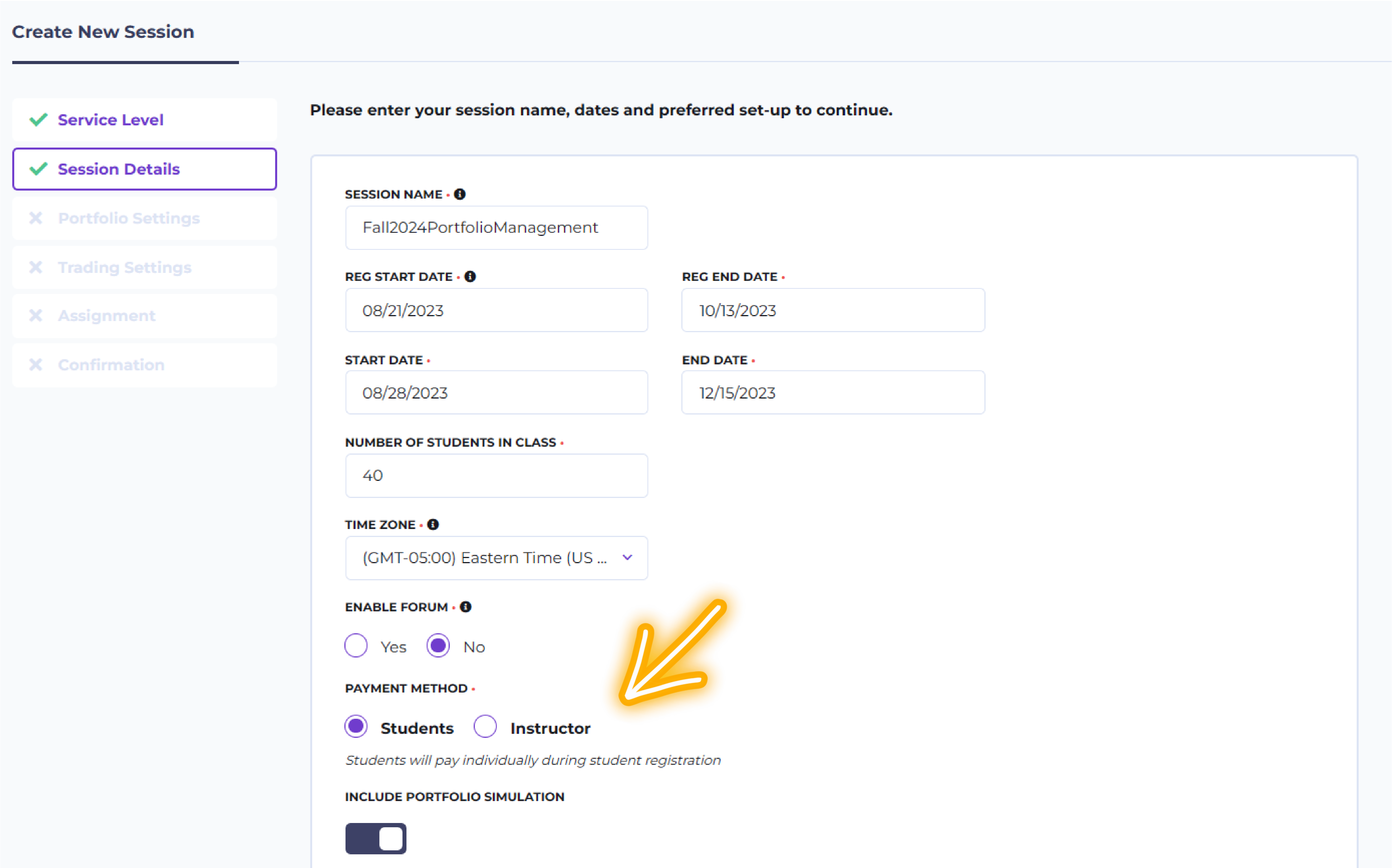


SESSION DETAILS

Enter the Session Name and Dates.

Payment Options

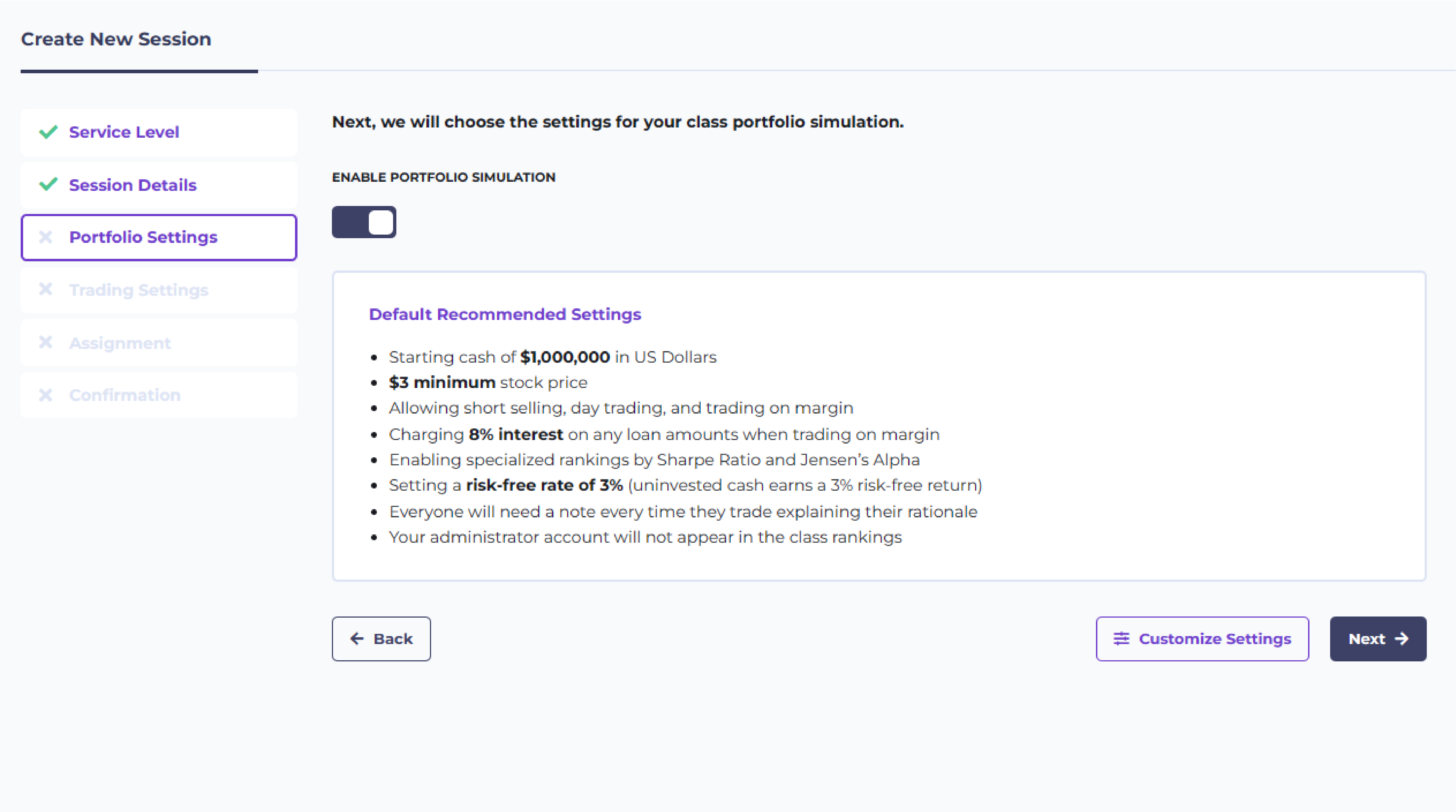
- Instructors
- Students



PORTFOLIO SETTINGS

Click next if you want to keep the Default Recommended Settings.

Click **Customize Settings** to change these settings.



TRADING SETTINGS

Choose from:

- Equities
- Stocks
- ETFs
- Cryptos
- Mutual funds
- Bonds
- Options
- Futures
- Future Options
- Forex
- Cash Spots

Equities

Stocks ETFs

COMMISSION •

10

POSITION LIMIT % •

25%

This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In AAPL)

DIVERSIFICATION % •

200%

This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Equities)

Cryptos

COMMISSION •

10

POSITION LIMIT % •

25%

This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In BTC)

DIVERSIFICATION % •

100%

This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Crypto)

Mutual Funds

COMMISSION •

10

POSITION LIMIT % •

25%

This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In The Fidelity Magellan Fund)

DIVERSIFICATION % •

100%

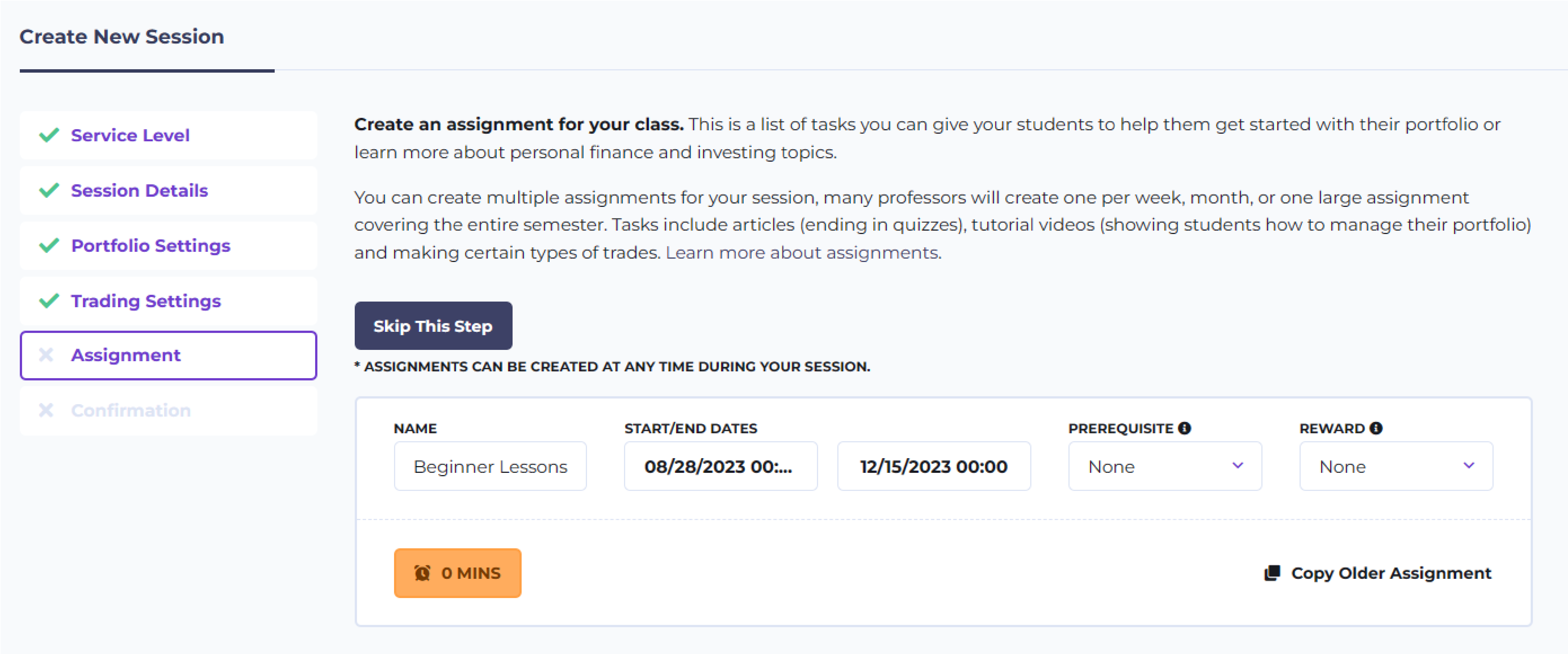
This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Mutual Funds)

ASSIGNMENTS

You can skip this step by clicking the **Skip This Step** button.
Please Note: we have a video and guide dedicated to setting up Assignments.

Include:

- Reading Articles
- Watching Tutorial Videos
- Completing Tasks



ASSIGNMENTS

Require Specific Trades:

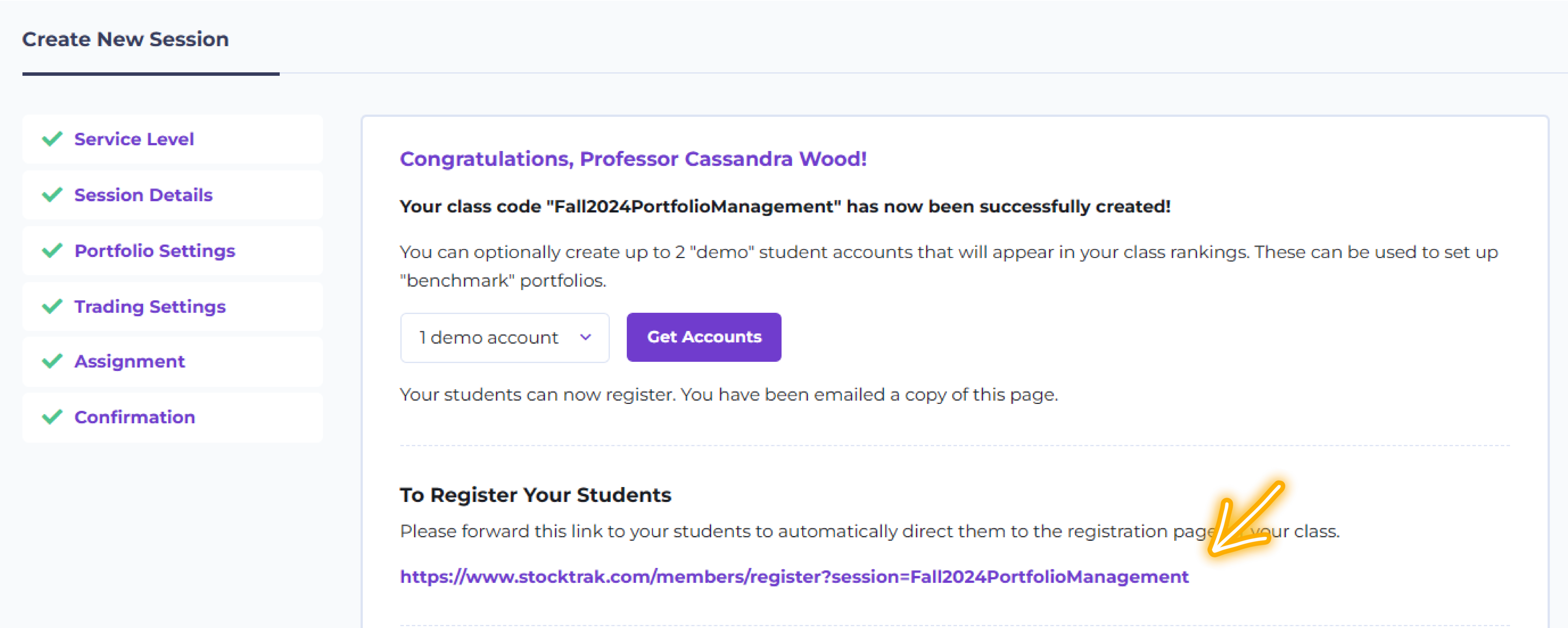
- Security Types
- Exchanges
- Order Types

Investing Actions - Basic Trades

REQUIRE?	ACTION	HOW MANY TIMES?	ALLOW RETRIES?
SELECT ALL TASKS | SELECT NONE			SELECT ALL RETRIES | SELECT NONE
✓	Trading - Buy or Sell Stocks/ETFs View	10	
	Trading - Buy or Sell Mutual Funds View	5	
✓	Trading - Buy or Sell Corporate Bonds View	3	
✓	Trading - Buy or Sell Treasury Bonds View	3	
	Trading - Short a Stock or ETF View	3	
✓	Trading - Use a Limit Order View	1	
✓	Trading - Use a Stop Order View	1	
	Trading - Use a Trailing Stop Order View	1	
	Trading - Use a Market Order View	1	
	Trading - Total Trades View	15	

CONFIRMATION

Share the registration link with your students so they can join your session.



STILL NEED ASSISTANCE?

CONTACT SUPPORT

SUPPORT@STOCKTRAK.COM