

# WebTrader QuickStart Guide

Download the software to your PC and the desktop version allows you to access your account through an internet browser, and is always up to date. It uses less memory and may run faster, but it has more features. To download to the desktop version, click on the Desktop Trader Workstation icon.

Click on the Desktop Trader Workstation icon.

Enter your username and password.

The screenshot displays the Interactive Brokers WebTrader interface. At the top, the 'Interactive Brokers' logo is visible. Below it, a navigation bar includes 'Market', 'Account', 'Options', 'Products', 'Scanner', 'Market Pulse', 'Search', and 'Fundamentals'. The 'Market View' section shows a table of market data for various stocks, including IBM, MSFT, CSCO, BMR, VOD, and AAPL. The 'Order Management' section is also visible, showing a 'New Order' form with fields for 'Action', 'Quantity', 'Symbol', 'Limit Price', 'Order Type', 'TW', 'Exchange', 'Currency', and 'Fill Outside RTR'. The 'Order Management' section also includes a table for 'Contract', 'Size', 'Bid', 'Ask', 'Size', 'Last', 'Change', 'Change (%)', 'Size', 'Volume', 'High', and 'Low'.

Contract	Last	Change	Change (%)	Volume	Bid	Size
IBM, Stock, SMART, USD	196.27	-0.50	-0.25%	1.6K	7	
MSFT, Stock, SMART, USD	C 34.35				79	34.30 34.35 34.40
CSCO, Stock, SMART, USD	24.24	-0.15	-0.62%		213	24.30 24.40 24.50
BMR, Stock, SMART, EUR	C 30.190					
VOD, Stock, SMART, GBP	C 183.35					159.80 272
AAPL, Stock, SMART, USD	C 398.67				250	393.88 399.48 256

Order Management section:

New Order Orders Trades

Stock Option Futures Forex Fund Bond Warrant CFD Structured Product Commodity Spread

Action Quantity Symbol Limit Price Order Type TW Exchange Currency Fill Outside RTR

BUY 100 GO LMT DAY SMART N/A

Contract Size Bid Ask Size Last Change Change (%) Size Volume High Low

Preview Order Clear

 Interactive Brokers

## **WebTrader QuickStart**

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Any symbols displayed within these pages are for illustrative purposes only, and are not intended to portray any recommendation.

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# Log Into WebTrader

**1** Hover your mouse to open the LOGIN menu

**2** Click to open the WebTrader Login page

Interactive Brokers

ENGLISH SEARCH LOG IN

WHY IB

TRADER WORKSTATION  
TWS Latest  
TWS  
TWS Beta

ACCOUNT MANAGEMENT  
Account Management  
Finish an Application

WEBTRADER  
WebTrader  
WebTrader Beta

API ACCESS  
IB Gateway Latest  
IB Gateway

Lower Your Costs  
Maximize Your Return

Low cost, best execution and innovative technology are just some of the reasons why traders, investors and institutions choose Interactive Brokers worldwide.

OPEN AN ACCOUNT WHY IB?

IB News Headlines: Customer Relationship Management (CRM)

Looking for Investment expertise?  
Find it at Interactive Brokers  
Investment Management. Partner with investment and trading service providers.  
EXPLORE THE MARKETPLACE

Careers at Interactive Brokers  
We are focused on providing cutting edge technology. Our future growth depends on attracting the best talent.  
APPLY TODAY

**3** Enter your User Name and Password, then click Login

Interactive Brokers WebTrader (SM) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Interactive Brokers WebTrader (SM)

IB WebTrader<sup>SM</sup>

User Name:

Password:

☐ Store settings on server

Login

English • 日本語 • 简体中文 • 繁體中文 • Deutsch • Español • Français • Italiano • Nederlands • Portugues • Русский • Slovenčina

IB WebTrader<sup>SM</sup> Previous Production Version

For Login Problems click [here](#)

**Optional**  
To view WebTrader in another language, click the desired language before you log in

**Optional**  
Click one of these links to:  
-Log in to the previous WebTrader production version  
-View login troubleshooting information

# The WebTrader Interface

**Tabbed Pages**  
Click a tab to view that page. Current page (Market page) is highlighted.

**[Tooltips On/Off]**  
Click to turn tooltips on or off.

**Logout**

**Market View**  
Default Watchlist

**Module Name**  
Each page displays one or more modules. You can add and remove modules in the Preferences window. The Market page includes the Market View module (where you view market data) by default.

**Watchlists**  
Tickers are grouped into Watchlists, which you can create in WebTrader or import from TWS and mobileTWS. Add Watchlists directly in the Market View or in Preferences.

**Preferences**  
Click to open the Preferences window, where you can add and remove modules, and configure site, trading and market data settings.

**[Bulletin]**  
Click to read important news from IB.

**Edit**  
Click to remove tickers, add or remove columns or change the order of

**Order Management Panel**  
Create and submit orders, view open orders and trades. Click the single blue arrow on the left to collapse the panel; click the double blue arrow on the right to expand the panel.

**Interface Details:**  
The interface shows the Interactive Brokers logo, navigation tabs (Market, Account, Options, Products, Scanner, Market Pulse, Search), and a top bar with [Help], [Tooltips On], and a close button. The main area displays a list of contracts (ES, NQ, YM, IBM, JPM, INTC, MSFT, CSCO, EXS1, DBK, VOW, DTE, DPW) with their respective bid and ask prices. The bottom section includes the Order Management Panel with tabs for New Order, Orders, and Trades, and a table for contract details.

# Add Market Data

Interactive Brokers WebTrader (SM) - Account U4401140 - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Interactive Brokers WebTrader (SM) - Ac...

webdev101:8081/webtr... 6969512155&websocket=false

Click the Market tab 1

Interactive Brokers [ Help ] [ Tooltips On ] X

Market Account Options Products Scanner Market Pulse Search Preferences

Account: U4401140 [ Bulletin ]

Market View Done

Default Watchlist Add Watchlist

Contract	Last	Change	Change (%)	Volume	Bid Size	Bid	Ask	Ask Size
ES, 20150918, Futures, GLOBEX, USD	D 2071.00	+6.50	0.31%		61	2071.00	2071.25	481
NQ, 20150918, Futures, GLOBEX, USD	D 4531.50	+9.00	0.20%		1	4531.50	4531.75	15
IBM, Stock, SMART, USD	D 159.65	+0.58	0.36%					
JPM, Stock, SMART, USD	D 68.56	+0.55	0.81%					
INTC, Stock, SMART, USD	D 28.55	+0.20	0.71%					
MSFT, Stock, SMART, USD	D 45.63	+0.28	0.62%					
CSCO, Stock, SMART, USD	D 28.38	+0.17	0.60%					
EXS1, Stock, SMART, EUR	D 98.940	+1.420	1.46%					
DBK, Stock, SMART, EUR	D 29.990	+0.550	1.87%					
VOW, Stock, SMART, EUR	D 188.700	+3.250	1.75%		110	188.750	188.850	47
DTE, Stock, SMART, EUR	D 16.580	+0.230	1.41%		10,991	16.580	16.580	3,837
DPIW, Stock, SMART, EUR	D 27.650	+0.00	0.00%		1,100	27.650	27.660	1,100
EUR, Cash, ID, SMART, EUR	D 1.10375	+0.000	0.00%		1.1M	1.10375	1.10380	13.8M
USD, Cash, ID, SMART, USD	D 123.660	+0.000	0.00%		2.9M	123.660	123.665	11.7M

Add Row Add Column

[ Order Management ]

If you have a lot of ticker rows showing, you can display more of them on the screen by collapsing the Order Management Panel. To do this, click the [Order Management] label. Optional

Click Add Row. The contract lookup box opens. 2

3 Select your desired asset class by click the appropriate tab

4 Type a symbol in the Symbol field, then click Go. For asset classes other than stock, define additional contract parameters such as right, strike and expiry.

5 Select a contract from the drop-down list, then click Add to add the ticker row to the bottom of the Market View. Click Add and Dismiss to add the ticker row and close the contract lookup box.

Stock Option Futures Forex Fund Bond Warrant CFD Structured Product Index Commodity X

Symbol Exchange

Go SMART

Add Clear Add And Dismiss

aapl Go SMART

APPLE INC IBIS AAPL (Stock)  
APPLE INC MEXI AAPL (Stock)  
APPLE INC NASDAQ AAPL (Stock)



# Remove Market Data

**Step 1:** Click the Market tab

**Step 2:** Click the Edit button

Red minus signs appear next to each ticker row and column. The Edit button turns into a Done button

**Step 3:** Click the red minus sign next to the ticker you want to remove

Remove columns by clicking the red minus sign next to the column headings **Optional**

**Step 4:** The red minus sign turns into a Delete button. Click the Delete button to remove the ticker. You can remove as many ticker rows as you want while the minus signs are displayed

**Step 5:** Click the Done button

Contract	Last	Change	Change (%)	Volume	Bid Size	Bid	Ask	Ask Size
ES, 20150918, Futures, GLOBEX, USD	2062.50	-2.00	-0.10%		81	2062.50	2062.75	228
NQ, 20150918, Futures, GLOBEX, USD	4499.25	-23.25	-0.51%		19	4499.00	4499.25	6
IBM, Stock, SMART, USD	158.59	-0.48	-0.30%		1	158.60	158.62	1
DTE, Stock, SMART, EUR	16.440	+0.090	0.55%		2,500	16.440	16.450	2,000
DPW, Stock, SMART, EUR	27.440	+0.190	0.70%		500	27.440	27.440	1,097
EUR, Cash, IDEALPRO, USD	1.10458	-0.00450	-0.41%		1M	1.10455	1.10460	17.3M
USD, Cash, IDEALPRO, JPY	123.602	+0.365	0.30%		1.7M	123.600	123.605	13.2M

# Add a Watchlist

**1** Click Add Watchlist in the Market View.

**2** The Watchlist box opens. Click Add New Watchlist, and then type the name of the watchlist. Click the X in the corner to close the box.

**3** The new Watchlist is added to the Market View. To add tickers to the Watchlist, click Add Row and then use the Contract Lookup box to search for a contract.

You can also create new Watchlists and import existing Watchlists from TWS and mobileTWS on the Watchlist tab of the Preferences window.

Contract	Last	Change	Change (%)	Volume	Bid Size	Bid	Ask	Ask Size
ES, 20150918, Futures, GLOB	2086.25	+21.75	1.05%	449	2086.00	2086.25	187	
NQ, 20150918, Futures, GLOB	4552.25	+29.75	0.66%	18	4552.25	4552.50	5	
IBM, Stock, SMART, USD	160.06	+0.99	0.62%	4	160.06	160.07	5	
DTE, Stock, SMART, EUR	16.520	+0.170	1.04%	1,500	16.520	16.550	1,500	
DPW, Stock, SMART, EUR	27.650	+0.400	1.47%	600	27.500	27.590	600	
EUR, Cash, IDEALPRO, USD	1.10490	-0.00420	-0.38%	27.6M	1.10485	1.10495	21.8M	
USD, Cash, IDEALPRO, JPY	123.633	+0.395	0.32%	6.9M	123.630	123.635	2.7M	



# Add a Chart

1 Click the Market tab (or the tab where you want the chart to appear)

2 Click Preferences

The current page is selected

The Preferences window opens to the Content tab

3 Click Chart to add the Chart module to the current page

4 Click Add New Contract to chart a specific symbol

5 In the Contract Lookup, select an asset class, then type a symbol and click Go. Select the desired contract from the drop-down.

6 Click Save and Dismiss to save your selections, close the Preferences window and add the chart to the current page.

The Chart module looks like this

**Chart**  
MSFT, SMART, Stock  
1d Line  
Value start:28.82 min:28.49 max:28.92 end:28.86 07:28, 27 Jan 2011 - 13:29, 27 Jan 2011  
Volume total:102 090  
Zoom: MAX

# Create an Order

**1** Click a price in the Bid column to create a SELL limit order at the selected price. Click a price in the Ask column to create a BUY limit order at the selected price.

The Order Management Panel expands automatically and opens the asset type tab associated with your order.

**2** Modify order entry fields as required. To submit an order for a different symbol, type the symbol then press Go to display all possible contracts, then select a contract from the drop-down.

**Optional** You can also begin an order by clicking the desired asset class tab in the Order Management Panel.

**Optional** Click the green plus sign to add attributes to your order. Click the check box next to each attribute you want to add, then click the X to close the attribute box.

**Optional** Select Advanced Time in Force to add Start Time, End Time and other fields to the order.

**3** Click Preview Order to review your order, then modify it or submit it from the Preview window.

**Optional** Expert Mode lets you submit orders without having to preview them. Enable Expert Mode on the Trading Preferences tab in Preferences.

**4** Review the order, then click Submit Order. To change the order before submitting, it click Modify Order.

**Market View Table:**

Contract	Last	Change	Change (%)	Volume	Bid Size	Bid	Ask	Ask Size
IBM, Stock, SMART, USD	191.01	-4.82	-2.48%	23.4K	123	190.24	192.32	149
MSFT, Stock, SMART, USD	34.13	-0.22	-0.64%		123	34.13	34.62	149
CSCO, Stock, SMART, USD	25.11	-0.05	-0.20%		107	24.87	25.57	256
BMW, Stock, SMART, EUR	C 30.100							
VOD, Stock, SMART, GBP	C 193.95							
AAPL, Stock, SMART, USD	414.32	-8.03	-1.90%		107	414.32	424.07	255
GOOG, Stock, SMART, USD	886.14	-19.10	-2.11%		167	888.05	905.70	247
YHOO, Stock, SMART, USD	14.07	-12.60	-47.24%		191	13.85	14.68	296
USD, Cash, IDEALPRO, JPY	C 91.500			325K				
USD, Cash, IDEALPRO, CAD	C 1.07200							

**Order Management Panel:**

New Order Orders Trades

Stock Option Futures Forex Fund Bond Warrant CFD Structured Product Commodity Spread

Action Quantity Symbol Limit Price Order Type TIF Exchange Currency Fill Outside RTH

+ BUY 100 AAPL GO 424.07 LMT DAY SMART USD

Contract Size Bid Ask Size Last Change Change (%) Size Volume High Low

AAPL, Stock, SMART, USD 107 414.32 424.07 255 414.32 -8.03 -1.90%

Preview Order Clear

**Preview Order Window:**

Order: BUY 100 AAPL Stock @ 424.07 LMT DAY SMART USD Fill Outside Regular Trading Hour: No

Amount	Commission	Total	Initial Margin	Maintenance Margin	Equity With Loan
42,407.00			0.00	0.00	0.00

Submit Order Modify Order

**Attributes:**

- ☐ Discretionary
- ☐ Attach Auto Trailing Stop
- ☐ Attach Bracket Order

# Monitor Your Account

The screenshot shows the Interactive Brokers WebTrader (SM) interface. The top navigation bar includes tabs for Market, Account, Options, Products, Scanner, Market Pulse, and Search. The Account tab is selected, and a callout points to it with the text "Click the Account tab" and a green circle containing the number 1.

On the right side of the Account tab, there is a "Preferences" button. A callout points to it with the text "Optional Click Preferences to add or remove modules from this page".

The main content area is divided into several sections:

- Balances:** A table showing account balances for Securities (USD), Commodities (USD), and Total (USD). Callout: "View your current account balances".
- Margin Requirements:** A table showing margin requirements for Current and Overnight. Callout: "View your margin requirements".
- Market Value:** A table showing market value for Cash Bal, Stock, Sec Options, Fut Options, Fut P&I, Net Liquid, Unrealized P&I, and Realized P&I. Callout: "View the market value of your portfolio".
- Positions:** A table showing current positions. Callout: "View your current positions. Each position has an Open and Close button that lets you open and close the position.".
- Portfolio:** A table showing current portfolio. Callout: "View your current portfolio. You can remove this module in Preferences.".

Optional features are highlighted with green circles and callouts:

- Optional:** Click Edit to add or remove columns (pointing to the "Edit" button in the Positions table).
- Optional:** Click Edit to add or remove columns (pointing to the "Edit" button in the Portfolio table).



# View Option Chains

1 Click the Options tab

2 Option chains are displayed on a separate tabbed page for each underlying, sorted by expiry. To view option chains for an underlying, add a tabbed page by clicking the green plus (+) sign.

3 In the Contract Lookup, type a symbol and click Go. Select the desired contract from the drop-down.

Option Chains - MSFT

CALL				PUT			
Bid	Ask	Last	Change	Bid	Ask	Last	Change
2.20	2.30	C 2.21				C 0.01	
1.70	1.80	C 1.73				C 0.02	
1.20	1.30	C 1.25				C 0.05	
0.80	0.90	C 0.82		0.10	0.20	C 0.12	
0.40	0.50	C 0.47		0.20	0.30	C 0.26	
0.20	0.30	C 0.21		0.50	0.60	C 0.53	
-	-	C 0.08		0.80	1.00	C 0.90	
-	-	C 0.03		1.30	1.40	C 1.34	
-	-	C 0.01		1.80	1.90	C 1.82	
-	-	-		2.20	2.40	C 2.31	

Contract: MSFT, Stock, SMART, USD C 34.21

Option Chains - AAPL

19JUL13  
16AUG13  
20SEP13  
18OCT13  
17JAN14  
18APR14  
16JAN15

MSFT Edit +

Option

Symbol Exchange

Go SMART

Add Clear Add And Dismiss

The new tabbed page showing option chains for your selected symbol opens.

Optional Click Edit Columns to add, remove or change the order of columns.

Optional Click the blue up and down arrows to change the number of rows to display for each expiry, or click All to show all possible rows.

Optional Click an expiry to view all option chains for that date.

Option Chains - AAPL

CALL				PUT			
Bid	Ask	Last	Change	Bid	Ask	Last	Change
-	-	C 22.72		-	-	C 0.40	
-	-	C 22.74		-	-	C 0.39	
-	-	C 18.05		-	-	C 0.75	
-	-	C 18.09		-	-	C 0.73	
-	-	C 13.67		-	-	C 1.40	
-	-	C 13.73		-	-	C 1.36	
-	-	C 9.75		-	-	C 2.50	
-	-	C 9.81		-	-	C 2.48	
-	-	C 6.48		-	-	C 4.20	
-	-	C 6.52		-	-	C 4.19	
-	-	C 3.99		-	-	C 6.73	
-	-	C 3.99		-	-	C 6.75	
-	-	C 2.29		-	-	C 10.01	
-	-	C 2.26		-	-	C 10.06	
-	-	C 1.24		-	-	C 13.92	
-	-	C 1.21		-	-	C 13.99	
-	-	C 0.68		-	-	C 18.28	
-	-	C 0.63		-	-	C 18.36	
-	-	C 0.36		-	-	C 22.94	
-	-	C 0.33		-	-	C 23.01	

Contract: AAPL, Stock, SMART, USD C 417.42

Option Chains - AAPL

12JUL13

19JUL13  
26JUL13  
02AUG13  
16AUG13

MSFT AAPL Edit +

Account:

Ask 423.78 Size 146

Edit Edit Columns Rows to Show 20 All

# Create a Market Scanner

**1** Click the Scanner tab

**2** Select an instrument from the list. Note that the scan title changes with each selection.

**3** Select a location. Click the minus and plus signs to hide or show a location. The available locations change depending on the selected instrument.

**4** Select the scanner parameter from the list. The available parameters change depending on the selected instrument and location.

**5** Set the maximum number of contracts to return in the Max Results field. Selections depend on the selected scanner parameter. Select Auto to return 50 contracts.

**6** Click Search to run the scan

**Optional** Filter by Price: Include contracts whose prices are greater than or less than an amount you enter.  
Filter by Dividend Yield %: Include contracts whose dividend yields are greater than or less than a percentage you enter.

Scan Title: US Stocks - US Stocks - High Dividend Yield - Any

Instrument: US Stocks

Location: US Stocks, ListedNASDAQ, NYSE, AMEX, ARCA, NASDAQ, NMS, Small Cap, PINK/BB, Pink Sheets, OTCBB

Parameter: Top % Losers, Most Active, Not Open, Most Active (\$), Most Active (Avg \$), Halted, Closest to Limit Up/Down, Hot Contracts by Price, Hot Contracts by Volume, High Dividend Yield

Filter: Price (\$): greater than, Dividend Yield (%): greater than

Max Results: Auto

**7** Click Edit to change the scan criteria or to run a different scan.

The screen refreshes with the scan results displayed.

Scanner: US Stocks - ListedNASDAQ - Most Active - Any

Contract	Last	Change	Change (%)	Volume	Bid Size	Bid	Ask	Ask Size
MGM, Stock, SMART, USD	D 15.29	-0.06	-0.39%			15.28	15.29	
NLY, Stock, SMART, USD	D 11.90	-0.37	-3.11%					
OGG, Stock, SMART, USD	D 74.39	0.68	0.91%			74.38	74.39	
MJ, Stock, SMART, USD	D 12.54	-0.01	-0.08%			12.53	12.54	
EWZ, Stock, SMART, USD	D 42.18	0.66	1.56%			42.17	42.18	
EWJ, Stock, SMART, USD								
GOX, Stock, SMART, USD	D 24.30					24.29	24.30	
FOXA, Stock, SMART, USD	D 30.20					30.20	30.21	
NWM, Stock, SMART, USD	D 102.39					102.38	102.39	
FB, Stock, SMART, USD	D 25.66					25.66	25.67	
INTC, Stock, SMART, USD	D 23.52	0.27	1.16%			23.52	23.53	
KOO, Stock, SMART, USD	D 9.1500	-0.0500	-0.55%			9.1400	9.1500	
VFC, Stock, SMART, USD	D 41.60	-0.47	-1.12%			41.59	41.60	
JPM, Stock, SMART, USD	D 54.85	0.02	0.04%			54.85	54.86	
SPY, Stock, SMART, USD	D 166.85	1.65	0.99%			166.85	166.86	
INO, Stock, SMART, USD	D 1.27	-0.2900	-23.61%			1.26	1.27	
RF, Stock, SMART, USD	D 9.87	-0.25	-2.57%			9.86	9.87	
SNV, Stock, SMART, USD	D 2.90	-0.1900	-6.55%					
RMTI, Stock, SMART, USD	D 4.65	0.03	0.65%			4.65	4.66	
REX, Stock, SMART, USD	D 10.73	0.40	3.73%			10.73	10.73	



# Add a Product Page

**1** Click the Products tab

**Optional** The Products page shows market data, option chains and charts for a specific symbol. Customize the page by clicking Preferences, then add and remove different modules as needed.

**2** Add a tabbed Product page for each desired underlying. Click the green plus (+) sign.

**3** In the Contract Lookup, type a symbol and click Go. Select the desired contract from the drop-down.

The new tabbed Product page for your selected symbol opens.

**Market Data**

Contract	Last	Change	Change (%)	Volume	Size	Bid	Ask	Size
AAPL Stock, SMART, USD	420.04	-7.26	-1.74%		5	420.04	421.27	15

**Option Chains**

Option Chains - AAPL

12 JUL 13				12 JUL 13				12 JUL 13			
Bid	Ask	Last	Change	Expiry	Strike	Exchange	Class	Bid	Ask	Last	Change
-	-	-	-	20130712	325.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	330.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	335.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	340.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	345.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	350.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	355.00	SMART	AAPL	-	-	-	-
-	-	-	-	20130712	355.00	SMART	AAPL	-	-	-	-

# Add a Module to a Page

1 Click the tab to which you want to add a module

2 Click Preferences

The current tab (Market) is highlighted. Add modules to other tabs by clicking the desired tab.

Modules enabled on the tab highlighted under Current Tabs are listed here

3 Available modules are listed here. Click the green plus sign (+) next to each module that you want to add to the current page.

Added modules move to the Modules Enabled list

Optional Change the display order of modules by dragging a module by the triple line icon

4 Click Save and Dismiss to close the Preferences window and apply your changes

Save Save And Dismiss

