

YAHOO INSTRUCTIONS

(1) www.yahoo.com

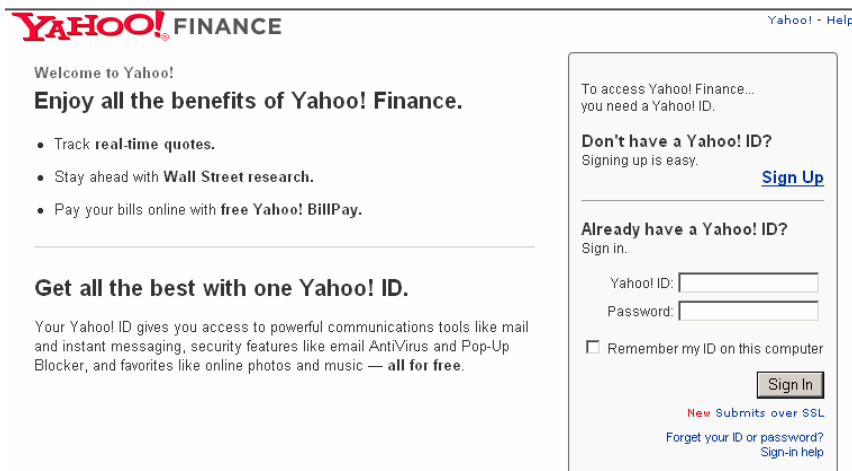
(2) Click the Finance icon at the top, left of the page.



(3) This brings you to:



In the upper left corner locate [Sign In](#) and *New User?* [Sign Up](#). If you have a Yahoo user ID and password, click [Sign In](#). To establish a user ID and password, click [Sign Up](#) and follow instructions.



Don't be surprised if your first Yahoo ID choice is already taken; this process may take a few minutes. Be cautious as you complete these steps. If you do not want a Yahoo e-mail address, you do not have to establish one. Make certain you **un**✓ any boxes you do not want checked. Once this process is completed successfully, it's a good idea to print the sheet with your ID and password. Just be certain you have this information stored somewhere safe.

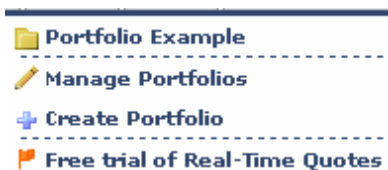
(4) Return to Finance home page. To the right of **FINANCE** you will see *Welcome, your user ID.*



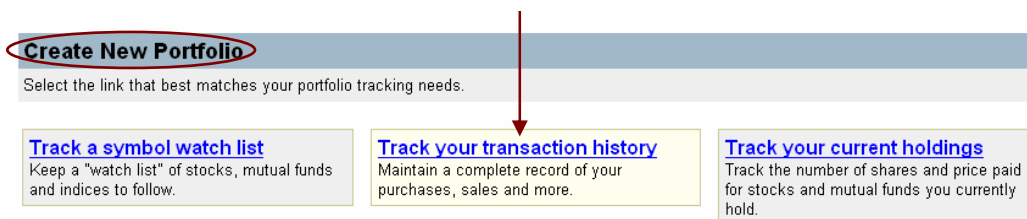
- (5) Locate the *My Portfolios* tab.



- (6) Click *My Portfolios*, and a drop-down menu appears. (Portfolio Example is a sample portfolio, previously created.) Click **Create Portfolio**. When your portfolio is created, its name will be listed at the top of this drop-down menu. If you create more than one portfolio (only one is used for this project), each portfolio's name will be listed at the top of this menu.



- (7) Click [Track your transaction history](#).



- (8) Name your portfolio. Set *Performance* as the Default view. Accept the three default settings as illustrated. Click *Continue* at the bottom of this window.

YAHOO! FINANCE [Search](#) - [Finance Home](#) - [Yahoo!](#) - [Help](#)

Create Transaction Portfolio

Name your portfolio, customize your settings and then click **Continue** to start recording transactions.

Step 1: Portfolio Basics

Portfolio Name:

Portfolio Currency: Overrides default where supported

Step 2: Positions Display (Optional)

Default view: ←

- Consolidate multiple lots of the same symbol into one entry in my position view.**
- Sort positions **alphabetically** by symbol, not in the order transactions are entered.
- Hide cash in *Positions* and My Yahoo! view.***
- Don't show portfolio total value on My Yahoo! pages.
- Include this portfolio in Yahoo! Money Manager.*

*My Yahoo! users: This option only applies if you pull up extended information on a portfolio.
**Number of shares displayed will be summed and price paid displayed will be averaged.
***If unchecked, your cash position will be shown under the symbol **\$\$CASH** and can be adjusted through cash transactions and security transactions like Buy, Sell, Sell Short and Buy To Cover.

- (9) Two transaction options are available—Security and Cash. Click *Cash*.
 Type: Select *Cash In* from the drop-down menu.
 Amount: \$500,000 (a **one-time only** entry)

Create Cash Transaction for your portfolio name

Enter portfolio transactions here to track buys, sales and other financial activity in your account. For more detailed instruction, visit the [help page](#). Be sure to click "Save" to record any new entries or "Save and create another" to continue entering transactions.

Hint: Recording **Buy, Sell, Sell Short** and **Buy To Cover** transactions will affect your cash balance. To record inflow and outflow of shares without affecting your cash position, use **Shares In** and **Shares Out**.

Transaction:	Security Cash <small>(Select "security" if you are recording stock, bond, or mutual fund transactions)</small>
Date:	Mar 14, 2006
Type:	Cash In
Amount:	<input type="text"/>
Notes: (optional)	<input type="text"/> <small>(40 character maximum)</small>

If you click *Save*, you will return to your portfolio page. If you don't have time to enter stock purchase transactions, click *Save*.

If you click *Save and Create Another*, the Transaction page will re-appear. If you are ready to purchase stock/s, click *Save and Create Another*.

Transaction:	Security Cash <small>(Select "cash" to record a cash transaction)</small>
Date:	Mar 14, 2006
Type:	Buy
Symbol:	<input type="text"/> Symbol Lookup
Shares:	<input type="text"/>
Price/Share:	<input type="text"/>
Commission: (optional)	<input type="text"/>
Notes: (optional)	<input type="text"/> <small>(40 character maximum)</small>

Transaction: Security
Date: Use current date.
Type: Select *Buy* from drop-down menu.
Symbol: you may have to look it up
Shares: total number to purchase
Price/Share: price of ONE share (Verify the price per share; if you checked the price hours or days ago, most likely it has changed.)
Commission: Optional, not required by project (If you choose to use this feature, use 1% of the total price which is price/share x no. of shares.)
Notes: recommend you type the full name of the company represented by the symbol

Continue clicking *Save and Create Another* to enter one transaction for each company's stock you are purchasing. When you run out of time, click *Save*. The next time you sign in to Yahoo Finance and open your portfolio, click *Create Transaction* at the top, right of your portfolio to add additional transaction/s.

[\[Create Transaction \]](#)

(10) When you view your portfolio, you'll see these columns.

Symbol	Last Trade	Chg	Volume	Shrs	Value	Value Change	Paid	Gain	Related Information
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- **Symbol** – abbreviation
- **Last Trade** – time and value of last trade
- **Chg** – change from the closing price of the day before and last trade price
- **Volume** – number of shares traded from opening today and the last trade
- **Shares** – number of shares purchased
- **Value** – current value of the shares of this security
- **Value Change** – two parts, dollar value and percentage
- **Paid** – amount paid for one share of the security
- **Gain** – two parts, dollar value of gain to date from the purchase price and percentage gain

(11) The *Related Information* section has four columns.

Related Information
Chart , Messages , Profile , more...

- **Chart** – produces a chart showing past years' share prices
- **Messages** – convey message board postings relating to company
- **Profile** – delineates a profile of the company
- **more...** – produces additional pieces of information relating to company's performance

(12) This project requires a *Day's Range* column. This column verifies the price paid by the student is within this range. THE REPORT EVALUATORS WILL COMPARE THE PRICE PER SHARE TO THIS COLUMN.

(a) To add the *Day's Range* column, locate [Performance \[edit\]](#). Click [\[edit\]](#).



Positions	Transactions						
Views: Basic - DayWatch - Performance [edit] - Real-time ECN - Detailed - [Create New View]							
Symbol	Last Trade	Chg	Volume	Shrs	Value	Value Change	Paid

(b) On number 10 click the down arrow and select *Day's Range*. *Day's Range* will replace the *Related Information* column (so *Day's Range* will be viewable on printout).

Step 1: View Name

View Name:

Show this View in the pull-down quotes

Step 2: View Fields

- 1 Symbol
- 2 Last Trade (With Time)
- 3 Change
- 4 Volume
- 5 Shares Owned
- 6 Holdings Value
- 7 Day's Value Change
- 8 Price Paid
- 9 Holdings Gain & Percent
- 10 Day's Range

- (c) On number 11 click the down arrow and select *More Info*. **Scroll to the bottom of the page and click *Finished*.**

Step 2: View Fields

1	Symbol	▼
2	Last Trade (With Time)	▼
3	Change	▼
4	Volume	▼
5	Shares Owned	▼
6	Holdings Value	▼
7	Day's Value Change	▼
8	Price Paid	▼
9	Holdings Gain & Percent	▼
10	Day's Range	▼
11	More Info	▼
12	—	▼
13	—	▼
14	—	▼
15	—	▼
16	—	▼

Finished Cancel

new column 10

Symbol	Last Trade	Chg	Volume	Shrs	Value	Value Change	Paid	Gain	Day's Range	Related Information
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- (d) Click File/Page Setup. Set Orientation to Landscape. Click File/Print Preview. **VERIFY** the *DAY'S RANGE* column will be viewable on the **one-page printout**. The *Related Information* column does not have to be viewable. Refer to the *Project Timeframe* handout (also www.investedok.org) to view the two required dates to print your portfolio. Refer to the *Report Requirements* handouts (also www.investedok.org) for the order in which to submit the two printouts. It is not necessary to submit all the extra *Recent News* information; do not submit.

Page Setup

Paper
 Size: Letter
 Source: Auto Select

Headers and Footers
 Header: &w&bPage &p of &P
 Footer: &u&b&d

Orientation
 Portrait
 Landscape

Margins (inches)
 Left: 0.75 Right: 0.75
 Top: 0.75 Bottom: 0.75

OK Cancel Printer...

- (13) At the bottom of your portfolio columns, note the *Value* and *Gain* totals. The *Value* column is the current total value of the portfolio. The *Gain* column represents the total gain or loss in the portfolio since initial purchases were made; this column is represented in both dollars and percent.

Positions		Transactions									
: Basic - DayWatch - Performance [edit] - Real-time ECN - Detailed - [Create New View]											
Symbol	Last Trade	Chg	Volume	Shrs	Value	Value Change		Paid	Gain		
AAPL	Mar 4	42.81	+1.02	27,022,100	700	\$29,967.00	\$714.00	+2.44%	41.79	\$714.00	+2.44%
AMGN	Mar 4	62.04	+0.07	6,838,486	700	\$43,428.00	\$49.00	+0.11%	61.97	\$49.00	+0.11%
APC	Mar 4	81.37	+2.39	3,006,700	700	\$56,959.00	\$1,673.00	+3.03%	81.37	\$0.00	N/A
BAC	Mar 4	46.78	+0.45	8,889,400	700	\$32,746.00	\$315.00	+0.97%	46.33	\$315.00	+0.97%
BKS	Mar 4	34.88	+0.04	364,200	1,000	\$34,880.00	\$40.00	+0.11%	34.84	\$40.00	+0.11%
COH	Mar 4	59.50	+0.13	1,504,400	400	\$23,800.00	\$52.00	+0.22%	59.37	\$52.00	+0.22%
DELL	Mar 4	40.87	+0.87	18,918,726	1,500	\$61,305.00	\$1,305.00	+2.17%	40.00	\$1,305.00	+2.17%
EP	Mar 4	12.25	-0.05	2,076,100	2,000	\$24,500.00	-\$100.00	-0.41%	12.30	-\$100.00	-0.41%
ESRX	Mar 4	84.82	+0.32	1,849,797	300	\$25,446.00	\$96.00	+0.38%	84.50	\$96.00	+0.38%
E	Mar 4	12.40	-0.10	7,352,600	2,000	\$24,800.00	-\$200.00	-0.80%	12.50	-\$200.00	-0.80%
FDX	Mar 4	99.60	+1.67	1,266,300	400	\$39,840.00	\$668.00	+1.71%	97.93	\$668.00	+1.71%
G	Mar 4	51.10	+0.30	2,649,600	800	\$40,880.00	\$240.00	+0.59%	50.80	\$240.00	+0.59%
GE	Mar 4	36.12	+0.57	20,328,900	900	\$32,508.00	\$513.00	+1.60%	35.55	\$513.00	+1.60%
GOOG	Mar 4	185.90	-1.105	6,778,129	500	\$92,950.00	-\$555.00	-0.59%	187.01	-\$555.00	-0.59%
INTC	Mar 4	24.68	+0.18	66,040,192	1,200	\$29,616.00	\$216.00	+0.73%	24.50	\$216.00	+0.73%
KFT	Mar 4	33.70	-0.03	1,334,900	1,000	\$33,700.00	-\$30.00	-0.09%	33.73	-\$30.00	-0.09%
KO	Mar 4	43.64	+0.46	6,570,700	500	\$21,820.00	\$230.00	+1.07%	43.18	\$230.00	+1.07%
MRK	Mar 4	31.68	+0.10	7,323,500	300	\$9,504.00	\$30.00	+0.32%	31.58	\$30.00	+0.32%
MSFT	Mar 4	25.17	0.00	63,058,128	1,000	\$25,170.00	\$0.00	0.00%	25.17	\$0.00	N/A
NAPS	Mar 4	7.47	+0.20	2,075,291	2,000	\$14,940.00	\$400.00	+2.75%	7.27	\$400.00	+2.75%
PETM	Mar 4	28.89	-0.76	3,674,680	700	\$20,223.00	-\$532.00	-2.56%	29.65	-\$532.00	-2.56%
PG	Mar 4	53.85	+0.37	4,552,200	700	\$37,695.00	\$259.00	+0.69%	53.48	\$259.00	+0.69%
SBC	Mar 4	24.49	+0.13	5,707,500	1,000	\$24,490.00	\$130.00	+0.53%	24.36	\$130.00	+0.53%
WMT	Mar 4	53.10	+0.24	11,556,300	700	\$37,170.00	\$168.00	+0.45%	52.86	\$168.00	+0.45%
YHOO	Mar 4	32.36	+0.05	17,499,732	1,000	\$32,360.00	\$50.00	+0.15%	32.31	\$50.00	+0.15%
\$\$CASH					153,361	\$153,361.00			-	-	-
26 symbols					Total(USD):	\$1,004,058.00	\$5,730.99	+0.57%		\$4,057.99	+0.48%

USD = US Dollars

(Dr. Horrell, retired University of Oklahoma Finance Instructor, used \$1,000,000 in this sample portfolio.)

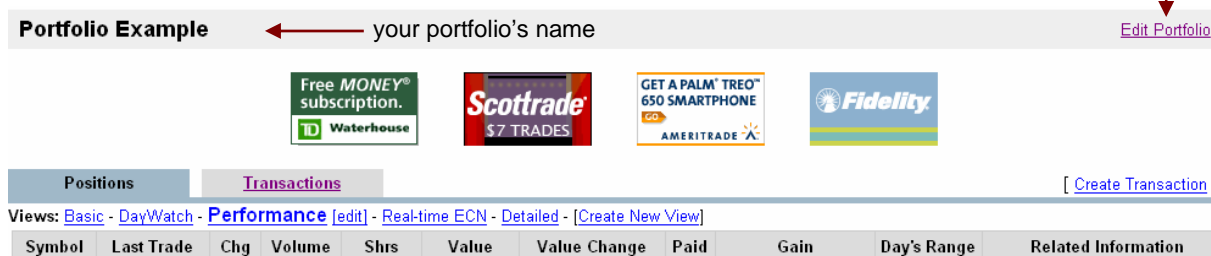
(14) To Edit Transaction/s, click the *Transactions* tab.



Note: The View is *Performance*. If you ever sign in to track your portfolio and its totals are missing, your portfolio is in a different view. Click *Performance*.

(15) To create a new transaction, click *Create Transaction*.

(16) If you click Edit Portfolio, you can Delete your portfolio. This is also the page to set your default view.



Edit Transaction Portfolio

Name your portfolio, customize your settings and then click **Finished**. To create a new transaction or edit an existing transaction, go to the [transaction page](#) for this portfolio.

Step 1: Portfolio Basics [or Delete This Portfolio](#)

Portfolio Name:

Portfolio Currency: Overrides default where supported

Step 2: Positions Display (Optional)

Default view:

- Consolidate multiple lots of the same symbol into one entry in my position view.**
- Sort positions **alphabetically** by symbol, not in the order transactions are entered.
- Hide cash in *Positions* and My Yahoo! view.***
- Don't show portfolio total value on My Yahoo! pages.
- Include this portfolio in Yahoo! Money Manager.*

*My Yahoo! users: This option only applies if you pull up extended information on a portfolio.
**Number of shares displayed will be summed and price paid displayed will be averaged.
***If unchecked, your cash position will be shown under the symbol `$$CASH` and can be adjusted through cash transactions and security transactions like Buy, Sell, Sell Short and Buy To Cover.

The content of Transaction Portfolios can only be changed through transactions. To create a new transaction or edit an existing transaction, go to the [transaction page](#) for this portfolio.

Click [transaction page](#) to return to your portfolio.

Remember to click *Finished* if you made any changes.

NOTES

The screenshot shows a 'Performance' view of a stock portfolio. At the top, there are tabs for 'Positions' and 'Transactions'. Below the tabs are navigation links: 'Basic', 'DayWatch', 'Performance' (selected), 'Real-time ECN', 'Detailed', and 'Create New View'. A table lists various stocks with columns for Symbol, Last Trade, Chg, Volume, Shrs, Value, Value Change, Paid, Gain, Day's Range, and Related Information. At the bottom of the table, there is a summary row for '9 symbols' and a link to 'Join Ameritrade'. Below the table are links for 'Set Alert - Portfolio Email' and 'Download Spreadsheet'.

Symbol	Last Trade	Chg	Volume	Shrs	Value	Value Change	Paid	Gain	Day's Range	Related Information
CSG	Mar 14 41.36	0.00	0	1,000	\$41,360.00	\$0.00 0.00%	38.49	\$2,870.00 +7.46%	N/A - N/A	Chart , Messages , Profile , more...
ERTS	9:30am 54.00	+1.06	221,433	1,000	\$54,000.00	\$1,060.00 +2.00%	55.59	-\$1,590.00 -2.86%	53.80 - 54.00	Chart , Messages , Profile , more...
GBVS.OB	9:30am 1.17	+0.03	3,156	500	\$585.00	\$15.00 +2.63%	1.13	\$20.00 +3.54%	1.15 - 1.17	Chart , Profile , more...
KMG	Mar 14 97.42	0.00	0	116	\$11,300.72	\$0.00 0.00%	78.80	\$2,159.92 +23.63%	N/A - N/A	Chart , Messages , Profile , more...
LMVTX	Mar 14 68.45	+0.97	N/A	200	\$13,690.00	\$194.00 +1.44%	68.82	-\$74.00 -0.54%	N/A - N/A	Chart , Profile , more...
PCAR	9:30am 70.51	+0.24	9,282	1,000	\$70,510.00	\$240.01 +0.34%	68.66	\$1,850.00 +2.69%	70.23 - 70.57	Chart , Messages , Profile , more...
TERX.OB	Mar 14 2.19	0.00	0	1,000	\$2,190.00	\$0.00 0.00%	3.05	-\$860.00 -28.20%	N/A - N/A	Profile , more...
WTW	Mar 14 50.30	0.00	0	250	\$12,575.00	\$0.00 0.00%	53.11	-\$702.50 -5.29%	N/A - N/A	Chart , Messages , Profile , more...
\$\$CASH				299,462.7	\$299,462.69		-	-		
9 symbols				Total(USD):	\$505,673.41	\$1,509.01	+0.30%	\$3,673.42	+1.81%	

[Join Ameritrade. 3Palm® Treo 650 smartphone + 25 free trades.](#)

(1) Real-time Mkt/ECN Quotes let you track the action in your favorite stocks in real time—before the market has opened, while the market is open, and after the market has closed. To obtain a market quote, simply select the "Real-time Mkt/ECN" link from the left hand menu available for all quotes. Real-time Mkt/ECN quotes are also displayed at the top of the Summary View every day starting at 4pm EST so you can see how the stock is trading after the market has closed for the day. *(from Help)*

What is an ECN?

Electronic Communication Networks (ECNs) are electronic marketplaces that bring buy and sell orders together and match them with each other. Today ECNs handle roughly 25% of the volume in Nasdaq stocks. *(from Help)*

Click *Real-time ECN* link. A new view option will allow you to click on one of your stocks to view in real-time. Scroll down to view the whole screen. This project does not use this feature.

(2) *Detailed* is a view option. Click it to check it out; you'll see charts and more. This project does not use this feature.

(3) *Create New View* allows you to create and name a customized view. This project does not use this feature.

(4) Click link to create a new transaction. You will use this feature!

(5) *Set Alert*. This project does not use this feature. Do **not** set; keep zero alerts. You'll get bazillions of e-mail messages.

- (6) *Portfolio Email*. This project does not use this feature. Again, do **not** utilize. This feature allows Yahoo to bombard your inbox with messages.
 - (7) On the *Project Timeframe* and other handouts, you'll see the words "Do not download spreadsheet." Download spreadsheet transfers your portfolio information to a basic Excel spreadsheet. This project does not use this feature.
-

Note the [Finance Home](#) link at the top, right of the portfolio page—very top.



Utilize the [Help](#) feature if needed.

Before printing your portfolio on the two dates listed on the *Project Timeframe* (only T W O required printouts), be certain the *Day's Range* column prints. Remember to switch to Landscape orientation.

Refer to handouts and information on www.investedok.org.