

## ***Tiger software for stockbrokers***

image scan - excerpt

Clients

TIGER

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### **ON THE PHONE**

A client is on the phone, and you need to quickly get to his accounts and their holdings.

#### **Before You Start**

Return to the MainMenu screen.

#### **Steps**

##### **a. Find the client's accounts.**

1. Select CLIENTS.
2. Select FIND.
3. Type the first part of the client's last name and press F1 DONE.
4. Select NEXT until you see the correct client.  
[To minimize what you have to type in, type only a portion of the name, then let the computer finish the name for you. If it's not the right name, let the computer flip alphabetically through the client list until the right one appears.]

##### **b. Find the holdings for an account.**

1. Select PICKACCT.
2. Select the account you want.
3. If the holdings fill up more than one screen:
  - Select NEXTPAGE to display any holdings that continue off your current page.

- Select 1STHOLD to get back from later pages.
- **To display unrealized gains and losses:**
  - Select GAIN.
- **To display yield information:**
  - Select YIELD.
- **To find another of the client's accounts:**
  - Select PRV ACCT to get the previous account, or...
  - Select NXT ACCT to get the next account.
- **To jump quickly to another client's holdings:**
  - Select FIND.

This displays the Account screen for the first account of the next client in line. Use PRV ACCT and NXT ACCT to get into this client's other accounts, as above.

Pressing F1 DONE takes you to the Client screen for this new client.

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**WHICH ACCOUNTS HOLD THIS SECURITY?**

Fast breaking news requires that you find out who holds this security and get their names, phone numbers, and holdings quickly on your screen. (Remember that printed reports are also available, see page 39.)

**Before You Start**

Return to the MainMenu screen.

**Steps**

1. Select XREF.
2. Select FIND.
3. Type the security symbol and press F1 DONE,  
**OR**  
Press RETURN, type the security code, and press F1 DONE.  
  
[The search can be conducted either by code or by symbol, but not both. You must choose which.]
4. If there is more than one screen of results, select NXTPAGE.
5. To see a cross-reference of the next-listed security, select NEXT.