



# ICE CHAT USER GUIDE

Oct 2023

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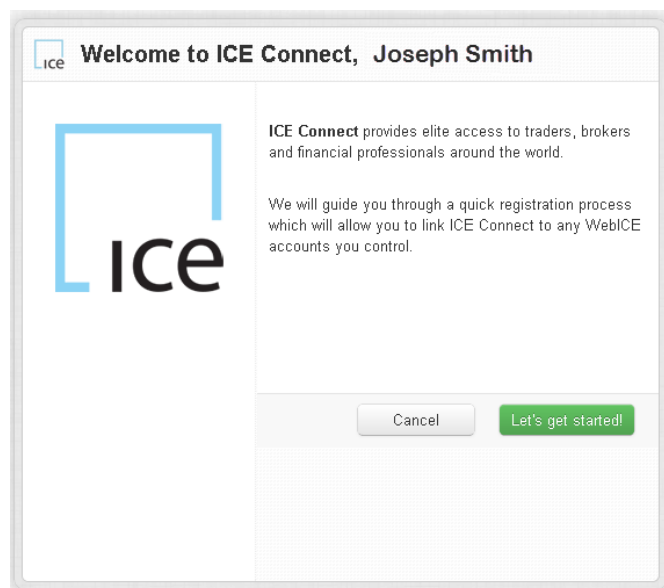
## ICE CHAT

ICE's enhanced Chat application offers the tools to keep you connected to the people and information that move markets. Featuring an easy-to-use, fully customizable interface, you can tailor your workspace solutions to increase workflow efficiency and react seamlessly to trading opportunities in real-time.

## REGISTRATION

To launch ICE Chat on Windows, go to [www.theice.com/launch](http://www.theice.com/launch) and install the appropriate ICE Web Start 64 or 32 bit installer. Then click the login button in the upper right corner of the screen and Select ICE Chat.

Please note that Mac users should go to [www.theice.com/launch](http://www.theice.com/launch) and install the ICE Web Start MacOS version, then click login in the upper right corner of the screen and select ICE Chat.



Click on the “**Let’s get started!**” button to begin the account setup process.

If you’ve logged in from WebICE the next screen will allow you to link an existing Chat account or have one created for you. If you choose to have one created, a Chat account will be auto-provisioned on your behalf and linked to your ICE account.

During the registration you can also link your existing WebICE accounts, as well as your existing Yahoo accounts. Once this is completed, you will be presented with a screen to add contacts to your account.

**NOTE:** if you decide not to do this now you can always link your accounts at a later point in time

## DEFAULT LAYOUT

Once registration is completed, the default layout will be displayed. This layout consists of one main screen containing the Contact List in the left region, a message console in the middle region, and a recent activity in the right region.

The footer of the application includes the Quick Access Tools where you can access your Themes, Workspaces, Preferences, Clear Badges, Clear All Flags, Add Contact, and Create/Edit Message



To the right of the Quick Access Tools you will find the Notifications window Service Monitor

**Region Menu**

- Clear Flags and Badges
- Close offline tabs and unused message consoles
- Expand, Remove, or zoom region
- Sort Tabs, show message search, price search, and message shortcuts

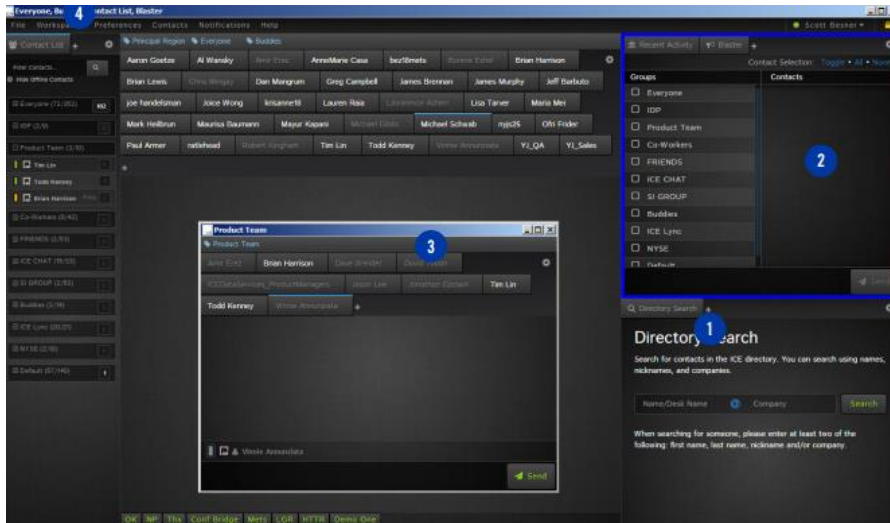
**Notifications and System Monitor**

- View Notifications
- View Connection status for ICE Chat and connected APIs

**Quick Access Tools**

- Themes
- Workspaces
- Preferences
- Clear badges
- Clear all flags
- Add Contact
- Create/Edit Message Shortcuts

# WIDGETS, REGIONS, WINDOWS, WORKSPACES



1. **Widget:** A widget is an application. The first widgets available are message tabs, recent activity, contact list, message blaster, groups manager and the directory search.
2. **Region:** A Region is a section within a console window which contains widgets.
3. **Console Window:** A console window can be split into one or more regions, allowing for layout customization.
4. **Workspace:** A workspace is an arrangement of console windows that can be distributed across one or more screens. Users can design and switch between multiple workspaces.

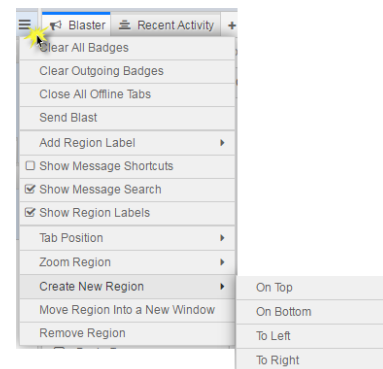
## DRAG & DROP / REGION SPLITTING

You can open new regions using advanced drag and drop functionality. Drag and drop a group or a contact from the contact list to create a new region and start communicating instantly. Drag a tab from one region to create a new one. As you drag new regions within your workspace, the application will automatically highlight the recommended drop positions and sizes.

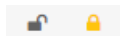
There is also the ability to configure your workspace layout prior to opening widgets with the use of region menu options to **Create New Region**.

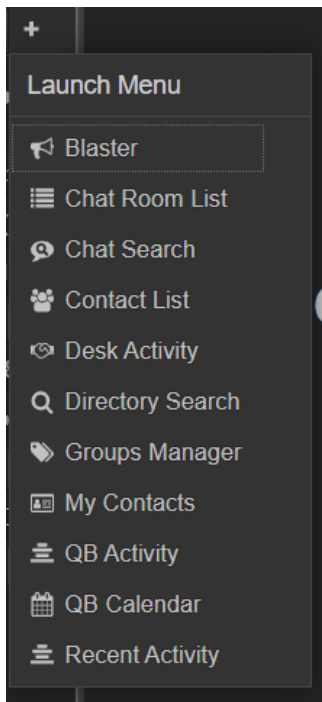
**On Top / On Bottom:** On Top will open a new region to the top, On Bottom will open a new region to the bottom.

**To Left / To Right:** To Left will open a new region to the left, To Right will open a new region to the right.



**TIP:** When your workspace is just the way you want it, lock it to prevent any unwanted changes.



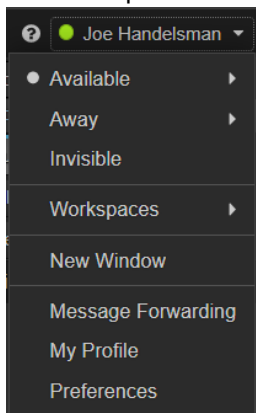


Easily access other message widgets by clicking on the “+” sign next to the last tab in any region;

- **Blaster:** Send a message to multiple contacts at once
- **Chat Room List:** all of your chat rooms in one widget.
- **Contact List:** All of your contacts in one easy to access list
- **Desk Activity:** Comprehensive view of all desk messages.
- **Directory Search:** Search the ICE directory for contacts and/or desks across multiple markets
- **Groups Manager:** Organize and manage your contact groups
- **Recent Activity:** Comprehensive view of all inbound messages

## OPEN NEW CONSOLE WINDOW

You can open a new console window under the **User** menu.





# REGION MENU CONTROLS

To edit the layout, there are controls in the region menus.

## SORT TABS

Choose to sort your tabs alphabetically or reverse alphabetically.

## TAB POSITION

Change the tab positions to place them on the Top, Left, Bottom, or Right of the region.

## ZOOM REGION

Set the zoom view for each region in percent value ranging from 20% to 200%.

## CREATE NEW REGION

Open a new region in the current console window. The new region could be opened On Top, On Bottom, To Left, or To Right.

## MOVE REGION INTO NEW WINDOW

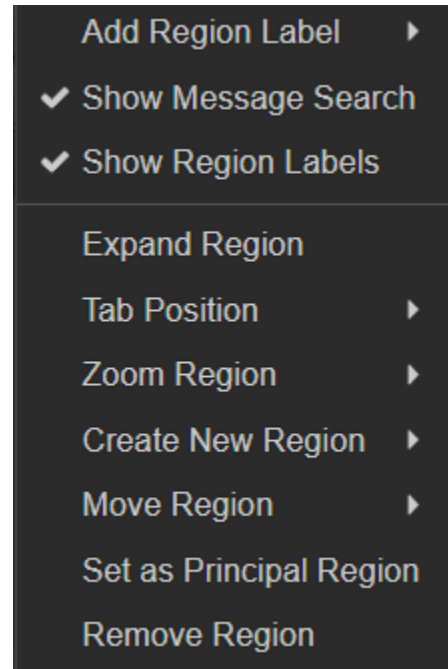
Tear the region out into its own console window.

## REMOVE REGION

Close the region.

## EXPAND REGION

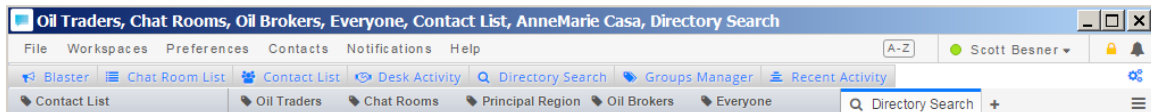
Temporarily enlarge the region so that it fills the entire app. Useful for reading large messages. Click outside the region to return it to normal size



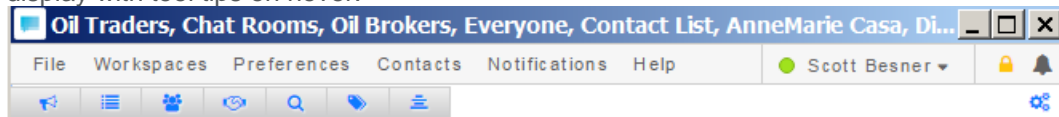
# QUICK LAUNCH BAR

The quick launch bar is an easy way to launch your widgets. It is available only in the main console and can be displayed/hidden as you desire. Widgets can be launched:

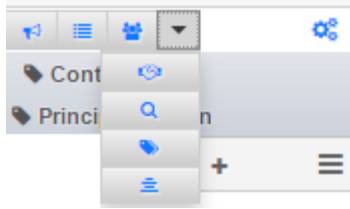
- By left-click: Opens widgets based on preference “When opening a message widget”
- By right-click: Opens widgets in a new window console
- By drag and drop: Place widgets where you desire, including dragging across windows.



If the viewable area the bar is within is too small to display the associated text, only the icons will display with tool tips on hover.

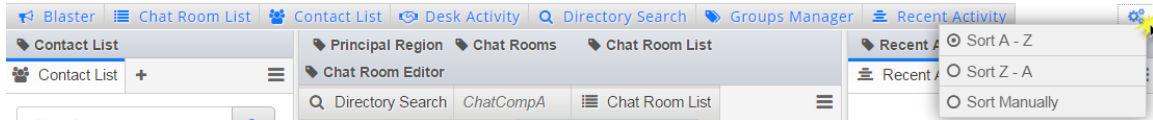


If the viewable area the bar is within gets even smaller, it will display a drop-down for the icons to be displayed.



## QUICK LAUNCH BAR SORTING

The quick launch bar can be sorted by drag and dropping the buttons to the desired position. There is also the ability to sort them alphabetically or reverse alphabetically by clicking on the gears icon.



## THEMES

ICE Chat offers you the ability to select a theme; currently there are two with more on the way. To select a theme go to Theme Icon (first on the left) in the Quick Access Tools section of the footer and select the theme you wish to use.



## MANAGING WORKSPACES

We know that you aren't always working at the same computer every day. Whether you're your desktop or a laptop, the platform allows you to configure as many workspaces as you require fitting your needs. To switch between different workspaces, click on the **Workspaces** icon in the Quick Actions Tools and select the workspace you wish to load.

You can create new workspaces by navigating to **Workspaces Icon** → **Manage Workspaces**. From the drop-down select the template you wish to use and click Add. The workspace is now added to your list of workspaces.

The following actions are also available from the **Workspace Manager** window:

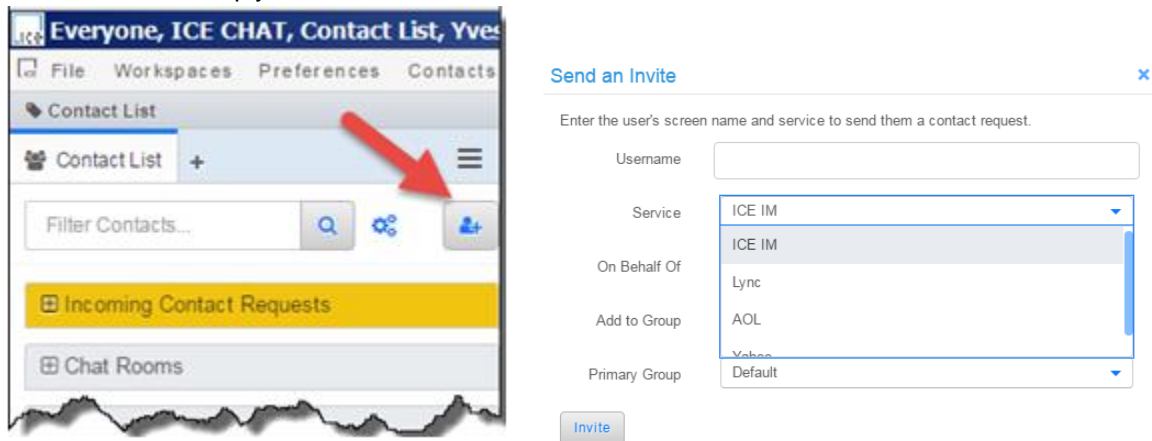
- **Edit workspace name** - click on the pencil next to a workspace name
- **Activate** - changes your workspace view to the selected workspace
- **Clone** - copies the workspace. The cloned workspace can then be edited as needed
- **Remove** - delete the workspace from your account

# MANAGE CONTACTS

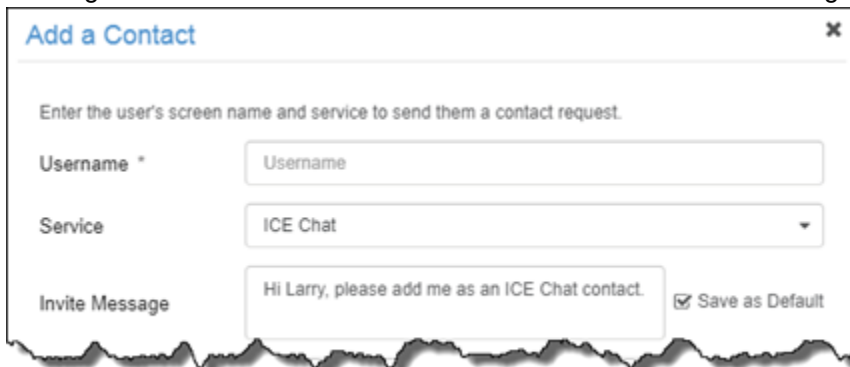
New contacts can be added from the **Add Contact** menu and/or the **Directory Search**.

## ADD CONTACT

From the Contact List, click on the Add Contact icon or navigate to **Contacts** → **Add Contact** to send an invite. Simply enter the username and select the service the contact is on.



You can also include a custom invite message on your contact request by filling out the “invite message” field. Click “Save as Default” to use the same invite message on all contact requests.



## ADD MORE DETAILS TO CONTACT REQUESTS

When adding a new contact the user will have the ability to add more details to the contact from the Add Contact screen.

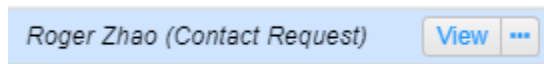
Some of the new fields the user will be able to add before even sending the invite are:

- Nickname
- Additional Emails
- Additional Phone
- Default Product
- Notes

<p><b>Send an Invite</b></p> <p>Enter the user's screen name and service to send them a contact request.</p> <p>Username <input type="text" value="Username"/></p> <p>Service <input type="text" value="ICE IM"/></p> <p>NickName <input type="text" value="Nickname"/></p> <p>On Behalf Of <input type="text" value="Individual"/></p> <p>Add to Group <input type="text" value="Select..."/></p> <p>Primary Group <input type="text" value="Default"/></p> <p>Emails <input type="text" value="Work"/> <input type="text" value="Enter a new e-mail address"/></p> <p>Phones <input type="text" value="Work"/> <input type="text" value="Enter a new phone number"/></p> <p>Default Product <input type="text" value="Crude - WTI"/></p> <p>Notes <input type="text"/></p> <p><input type="button" value="Invite"/></p>	<p><b>Send an Invite</b></p> <p>Enter additional information for 'Scott Brusso @ ICE.'</p> <p>NickName <input type="text" value="Nickname"/></p> <p>Add to Group <input type="text" value="Select..."/></p> <p>Primary Group <input type="text" value="Default"/></p> <p>Emails <input type="text" value="Work"/> <input type="text" value="Enter a new e-mail address"/></p> <p>Phones <input type="text" value="Work"/> <input type="text" value="Enter a new phone number"/></p> <p>Default Product <input type="text" value="Crude - WTI"/></p> <p>Notes <input type="text"/></p> <p><input type="button" value="Invite"/></p>
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## ACCEPTING REQUESTS

When you receive a request to become a contact, you will receive a notification through the System Alerts tab. Your pending connection requests will be listed in your contact list under the group **Connection Requests**. You may also click "View" to view this contact's profile before accepting the request.



Please note that contacts in your own company are automatically accepted as contacts. Simply add an internal contact and chat with them immediately.

Right-click on a contact or click the ellipsis button within that group to accept, ignore, or block the requestor.

**Accept:** you agree to become a contact with the requestor who can now contact you via IM. When a new contact is accepted their tab will be automatically opened.

**Ignore:** you and the requestor are not connected, but the user can always request you as a connection again.

**Block:** you are blocking the requestor from being able to contact you again. **NOTE:** you do have the ability to unblock the user at any time

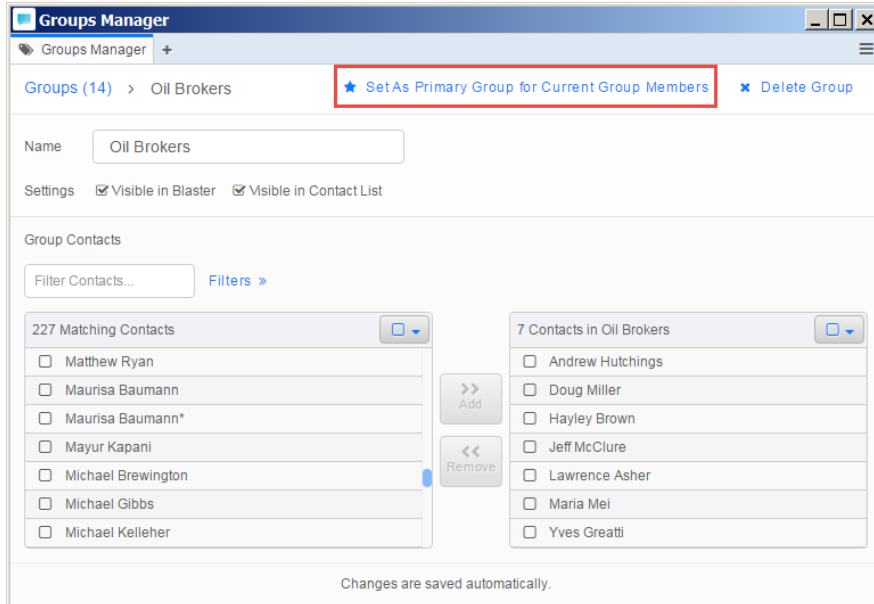
## PRIMARY GROUP

When you add or accept a new contact, you can specify a **Primary Group**. When you receive a message from a contact whose tab isn't open, their tab will be opened within their primary group except if your user preference is set to open in **Principal Region**.

## SET PRIMARY GROUP FOR ENTIRE GROUP

Right-click on a group from your Contact List or in the Groups Manager to set the primary group for all contacts within the group.

There is also a button in the Groups Manager, on each group, to perform this function.



## CONTROL HOW YOU VIEW YOUR CONTACTS

You can choose to view your contacts by their Full Name or Nickname by going to **Contacts → Nicknames**.

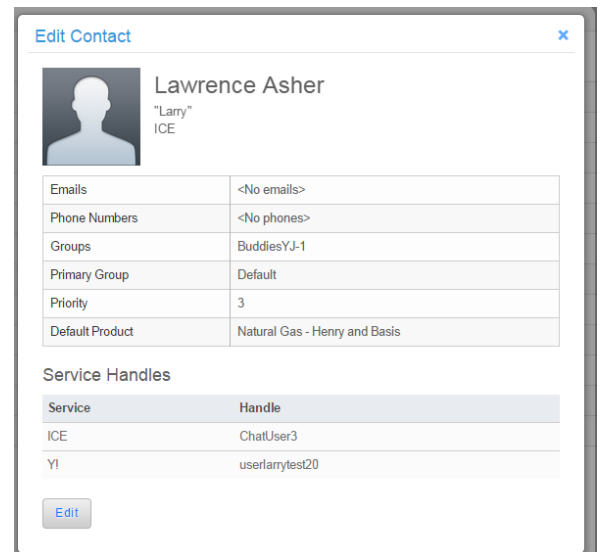
**TIP:** If you are viewing by nickname, you will see the nickname they have set for themselves unless you choose to edit.

## VIEW CONTACTS' HANDLES

To view the handles of a contact, go to Edit Contact. The handles are displayed at the bottom of the window.

## MY CONTACTS WIDGET (INCLUDING BLOCK USERS)

The My Contacts widget displays all pending requests related to your contacts. Here you can view the connections requests sent, the connection requests received, those contacts who have removed you from



their contact list, as well as those users you have blocked.

For each **Sent Connection Request** there is the option to **Cancel Request** or **Block** the user.

For each **Received Connection Request** there is the option to **Accept**, **Ignore**, or **Block** the user.

For each **Blocked User** in the widget there is the option to **UnBlock**.

For each **Removed Contact** in the widget there is the option to **Delete Contact** or **Send Connection Request**.

The screenshot shows a 'My Contacts' widget with a search bar and a menu icon. It is divided into several sections:

- Sent Connection Requests (6):** A list of six contacts with 'Cancel Request' and 'Block' buttons for each.
- Received Connection Requests (4):** A list of four contacts with 'Accept', 'Ignore', and 'Block' buttons for each.
- Blocked Users (1):** A list of one contact with an 'UnBlock' button.
- Removed Contacts (5):** A list of five contacts with 'Delete Contact' and 'Send Connection Request' buttons for each.

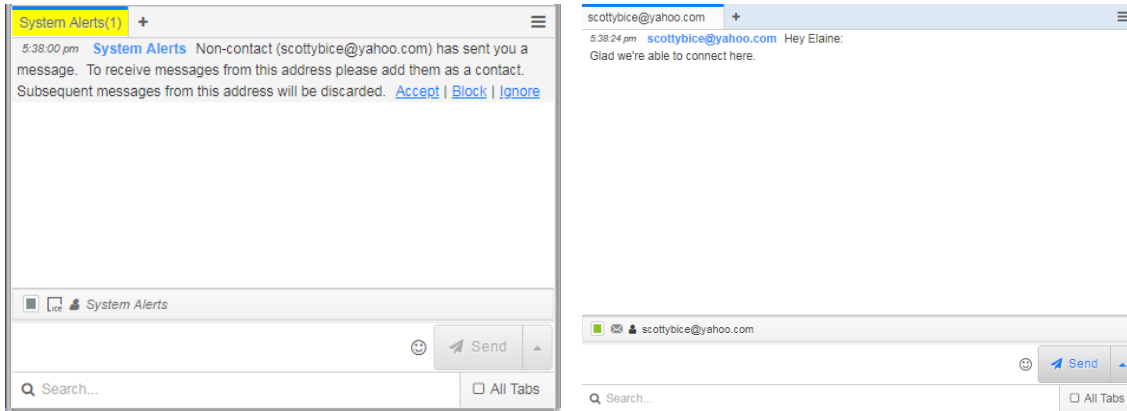
## EMAIL AS A MEANS TO CHAT

You can now be provisioned with an ICE Chat email address which enables you to send and receive email messages from your ICE Chat client keeping all of your message workflow in one application. All messages in and out of the system run through the ICE Chat system, ensuring that our proprietary parsing is applied as well all of your compliance rules. Your email address will be [ICEIMhandle@im.ice](mailto:ICEIMhandle@im.ice).

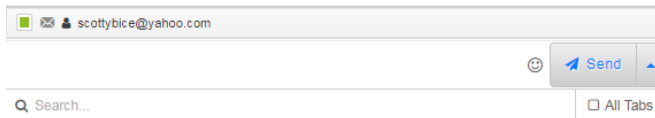
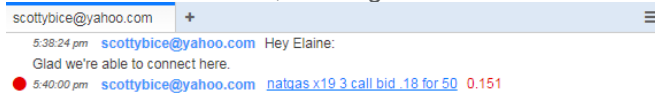
When a message arrives from an email address you are not already a contact with, you will have the ability to Accept, Block, or Ignore. The actual message will not be delivered unless you Accept.

**First Message From Non-Contact Email Address**

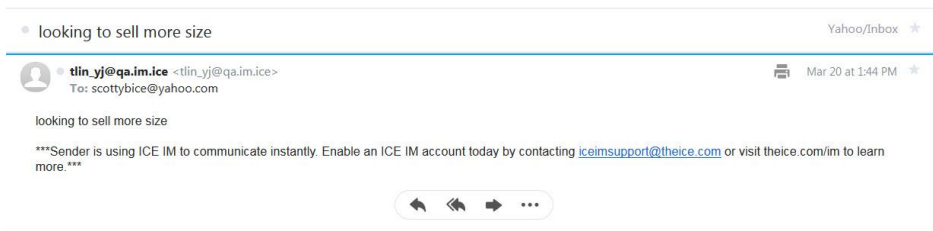
**Message Delivered After Accepting**



Once you're connected to an email address, messages can be sent and received using ICE Chat.



When sending a message from ICE Chat to an email address the user will see the first line of the message as the subject so they can see what the message is about without even opening it.



### **ICE Chat Email Tips**

ICE Chat does our best to strip out signatures and disclaimers.

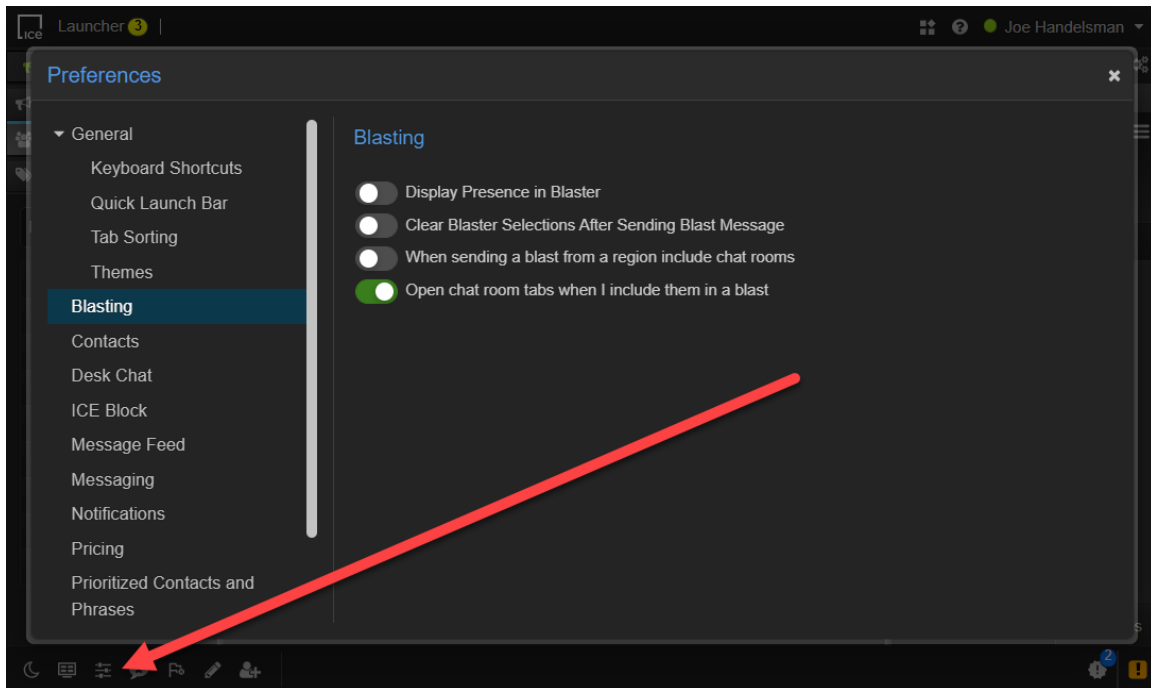
ICE Chat does our best to strip out history so that only the most recent message comes through

# CHAT CAPABILITIES

Our Chat platform offers you not only the basic IM necessities, but also includes some advanced features to streamline your workflows.

## PREFERENCES

Preference can be access via the Quick Actions Tools



User preferences have been added to control the opening of message widgets.

Click the **Preferences icon**->**Messaging** -> **When a new message arrives** → (for your inbound messages)

- **Open New Window Maximized** = if contact's tab is open, highlight tab. If contact's tab is not open - open a new window for their group which pops up.
- **Open New Window Minimized** = if contact's tab is open, highlight tab. If contact's tab is not open - open a new window for their group which opens in the background. (Task bar flashes)
- **Open in Principal Region** = if contact's tab is open, highlight tab. If contact's tab is not open - open a tab in the region you designated as principal region.
- **Never open New Window** = if contact's tab is open, highlight tab. If contact's tab is not open - do not open a new window/tab - just highlight the contact list.

**When opening a message widget** →

- **Open in Same Region** = if contact's tab is open, focus on the tab. If contact's tab is not open - open a tab in whichever region you clicked in.
- **Open in Principal Region** = if contact's tab is open, focus on the tab. If contact's tab is not open - open a tab in the region you designated as principal region.



- **Open in New Window** = if contact's tab is open, focus on the tab. If contact's tab is not open - open a new window for their group which pops up.

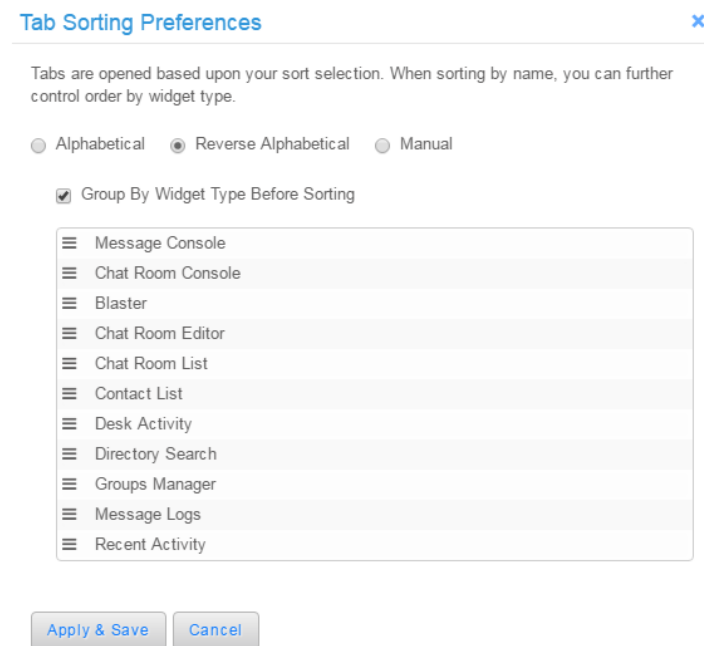
## TABS SORTING

ICE Chat offers the ability to sort tabs under **Preferences → General → Tab Sorting**. There are 3 options: Alphabetical, Reverse Alphabetical, or Manual (default). Tabs will open in their respective regions based on preference selection.

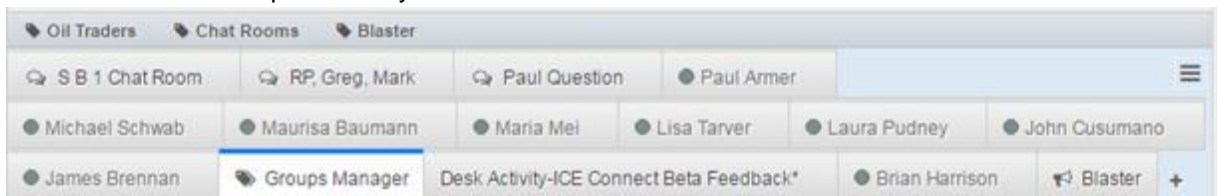
There is an indicator in the top right of the main window letting you know which more you're currently in for your tab sorting.

Clicking here will open the preferences window.

**Group By Widget Type Before Sorting:** This allows you to specify the order for each widget type, each of which will be opened in the selected order.



Tabs sorted reverse alphabetically:



Same tabs sorted reverse alphabetically with the group by widget selected:



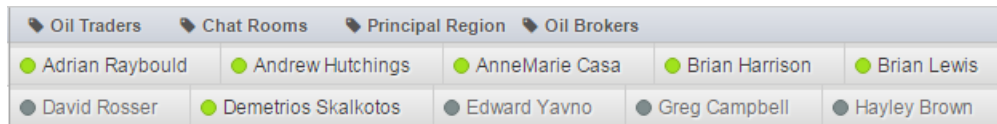
## CONTACTS SORTING

You can sort your contacts alphabetically or reverse alphabetically in widgets such as the contact list, the blaster, and the participant lists of your chat rooms. For sorting within the contact list you can also specify if you want to group your contacts by presence before sorting. Go to **Preferences-> Contacts**.

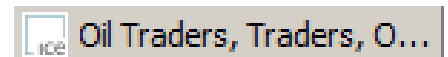
## REGION LABELS

Regions are tagged with labels indicating which group(s) comprises the region. Regions can contain multiple groups. The opening of message widgets, both manually and upon receiving a message, will abide by the region tags.

When a region is tagged, the labels will be displayed above the tabs:



The task bar as well as the window title bar will display the tags.



If you wish to un-tag a region, hover on the tag and click "x". This will remove the association between the group and region.

## PRINCIPAL REGION

You can always set a principal region for opening your message tabs.

Select **"Open in Principal Region"**, from the following preferences:

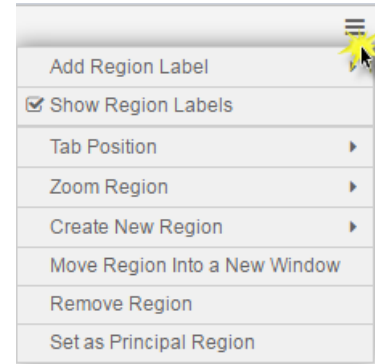
- **When a new message arrives**

- **When opening a message widget**

With this preference set:

- Manually opening message tabs will open in the principal region if there is no instance of the contact open already
- Incoming messages will open in principal region if there is no instance of the contact open already

You can change the principal region from the Region Menu within any region by selecting “**Set as Principal Region**”.

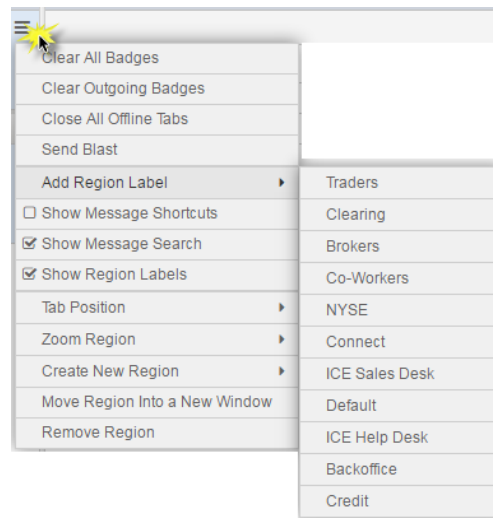


In this same **Region Menu**, you can show or hide region labels by selecting/de-selecting “**Show Region Labels**”. With this de-selected, the rules of the labels still apply.

## ADD REGION LABEL

You can add a group label to any region from the Region Menu by selecting “**Add Region Label**”.

A menu will appear with all of your current groups to choose from.



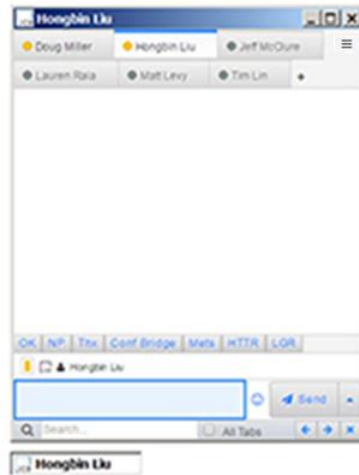
## NAMING OF TORN OUT CONSOLES

- When a tab is torn out into a new window console, the window title and task bar icon will display the active tab name.
- When an entire region is torn out, the window title and task bar will display all group labels and widgets as well as the active tab.
- As more widgets, groups, and contacts are added the window title bar will update accordingly.
- With one console the groups and widgets are always displayed as well as each active contact tab in each region.

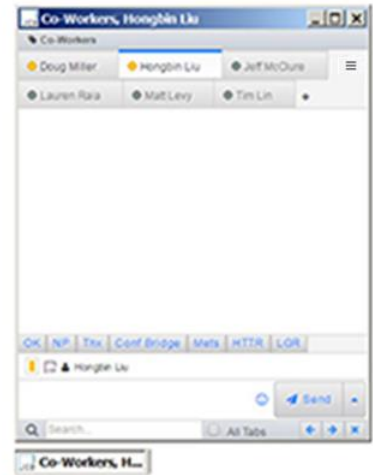
### SINGLE CONTACT TORN OUT



### MULTIPLE CONTACTS IN SAME TEAROUT



### MULTIPLE CONTACTS WITH GROUP LABEL



## CONTACT LIST

The contact list widget displays all of your contacts. Contacts are listed within their groups and contacts can be members of more than one group.

**Search Contacts** - Quickly type-ahead to find the contact you're looking to message. You can search by Name, Desk, and Company. Additionally, you can click the arrow next to the search fields to also search on Role, Market Type, Product Name, and Region.

The search widget consists of a dark grey background with several search fields. The first field is 'Name or Desk' with a magnifying glass icon. To its right is a field for 'Company' with an '@' icon and a dropdown arrow. Below these are four more fields, each with a dropdown arrow: 'Role', 'Market Type', 'Product Name', and 'Region'.

Click on a contact to open it and clear the search, ctrl+click a contact to open it and keep the existing search in place.

When you search your contacts, ICE Chat will automatically query the ICE Directory for non-contact matches. Current contacts will appear in the "My Contacts" folder. Non-Contacts in your company will appear in the "My Company Directory" folder. External non-contacts will appear in the "External Contacts Directory" folder. You can expand or collapse each folder.

The action menu next to the filter contacts box offers you the following capabilities:

- Expand All Groups
- Collapse All Groups
- Show/Hide Offline Contacts
- Show Only Desk Contacts



**Recent Contacts** - Recent contacts appear in a special group at the top of your contact list as messages are sent/received to that contact. To enable/disable or set options on how many and what type of contacts display in the group, go to “Enable Recent Contacts Group” in your preference menu.

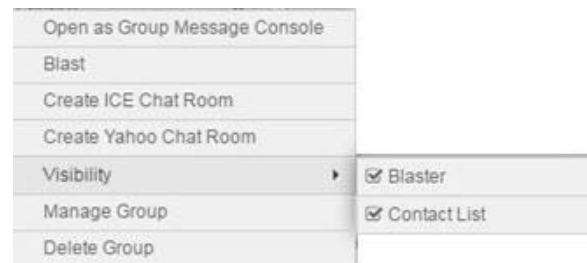
**VIP Contacts** - You can create a dynamic group that appears under your Recent Contacts folder that contains your priority contacts or contacts with flagged messages. Go to Preferences->Contacts->Enable VIP group to enable/disable this group

**Show Company Name in Contact List** - Company names can be displayed in your contact list by selecting on “Show Company Name In Contact List” in your Preferences->Contacts menu. In this mode, company names will be shown underneath the contact name.

## RIGHT-CLICK MENU - GROUP

The contact list offers functionality via the right-click menu on the group. Users can:

- **Open as Group Message Console:** if the group is not open elsewhere, this will open the group as a new console window.
- Send a **Blast** message to the group, seeding the Blaster with members of the group
- **Create Chat Room** loading the group members into the invite list in the Chat Room Editor. (Permission based)
- Toggle the **Visibility** of a group within the Contact List and/or Blaster
- Manage Group via the **Group Manager**
- **Delete Group**



## RIGHT-CLICK MENU - INDIVIDUAL

The contact list offers functionality via the right-click menu on the individual as well. Users can:

- **Open in Message Console:** will open the contact within a message console, abiding by user preferences.
- Send a **Blast** message to the user, seeding the Blaster with the selected user
- **Create Chat Room** loading the contact into the invite list in the Chat Room Editor. (Permission based)
- **Edit Contact** so you can update their contact details.
- **Copy Contact To** another group; will place the contact in the selected group as well as keep the contact in the current group

- **Move Contact To** another group; will place the contact in the selected group and remove them from the current group
- **Remove From Group** will remove the contact from the selected group
- **Disconnect** from the contact so they can longer reach you
- **Block** a current contact from reaching you in the future

## ENHANCED MESSAGE SHORTCUTS

Message shortcuts are user defined buttons that allow you to send (or queue up) preset messages. This can be accessed via the Quick Access Toolbar. For each button you can configure:

- The button label
- The message associated with the button
- The foreground color of the button
- The background color of the button
- A distribution list to associate with the button (default is none)

**Message Shortcuts** ✕

⚙️ General Settings

Left Click  
Auto Send ▾

Right Click  
Insert ▾

Message Shortcuts (5) + Add New Shortcut

Order	Label	Message	Groups	Contacts	Chat Rooms	FG	BG	Edit	Delete
☰	Scott's Test	This is a test blast message with a distribution list associated. This blast will go to the Chat Room "L S 1 Chat Room" along with all contacts in my Default group and the contacts "Larry Asher" and "S Bez"	1	2	1	■	■	✎	✖
☰	Good Morning	Good Morning	1	0	0	■	■	✎	✖
☰	UR OUT	UR OUT	0	0	0	■	■	✎	✖
☰	Done	Done	0	0	0	■	■	✎	✖
☰	My #	212-323-6076	1	0	0	■	■	✎	✖

☰ Drag the handles to change the order buttons are displayed

To create a message shortcut button, go to **Quick Access Toolbar → Message Shortcuts Button**. Click **Add New Shortcut**. Enter your desired **Label** for the button as well as the **Message** to associate. You can configure the **Text** (foreground) and **Background** color for the button as well.

If you don't want to associate any **Recipients** you can Save this button. If you wish to associate **Recipients** with the button you can select **Chat Rooms**, **Groups**, and/or **Contacts**.

Shortcuts (5) Save Cancel Delete

Label: Scott's Test

Message: This is a test blast message with a distribution list associated. This blast will go to the Chat Room "L S 1 Chat Room" along with all contacts in my Default group and the contacts "Larry Asher" and "S Bez"

Colors: Text █ Background

Recipients

Chat Rooms: L S 1 Chat Room

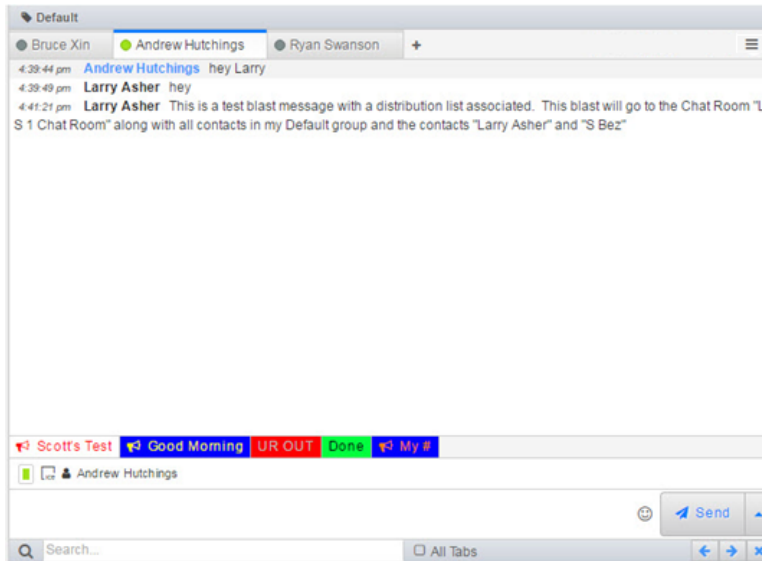
Groups: Default

Contacts: Filter Contacts... [Filters >](#)

All Other Contacts (1)		2 Contacts selected
<input type="checkbox"/> Larry Asher*	<input type="button" value="Add"/>	<input type="checkbox"/> Larry Asher
	<input type="button" value="Remove"/>	<input type="checkbox"/> S Bez

There are some **General Settings** to set default actions for the left and right clicks. There are 3 options:

- **Auto-Send:** Sends the message to the selected tab if there is no distribution list associated with the button or sends the message to the entire associated distribution list if there is one associated.
- **Insert:** Loads the message into the text entry for the selected tab if there is no distribution list associated with the button or loads the message into the Blaster with the associated distribution list selected.
- **None:** Does nothing on mouse click.



Messages can even be built by pressing multiple shortcut buttons. Message shortcut buttons can be displayed or hidden in each region via the user setting in the region menu.

## MESSAGE SEARCH

You are able to search through your messages in each region and can elect to search only the current tab or all tabs in the region. Message search can be displayed / hidden in each region via the user setting in the region menu. As you scroll through your results, the text string will be highlighted.

10:17:19 am Scott Besner wti z 50 calls 5/6  
 10:17:32 am Scott Besner looking for size

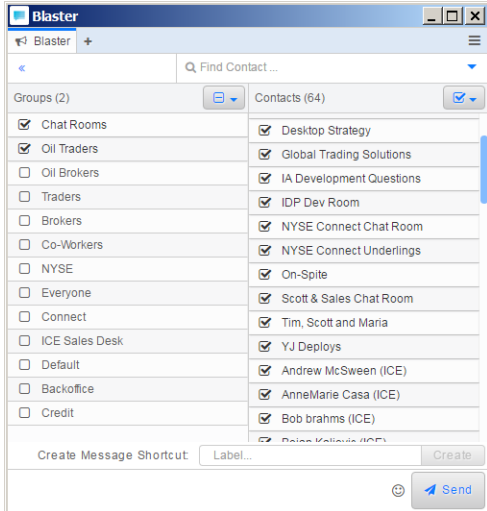
## FILTER SEARCH RESULTS TO HITS ONLY:

Click Preferences in Quick Access Tools->Search Preferences menu, check **Filter Search Results** to display only the messages that match your criteria when searching your message consoles. Clear your search to view all messages. When unchecked, ICE Chat will display all messages and highlight matching text as we do today.

## BLASTER

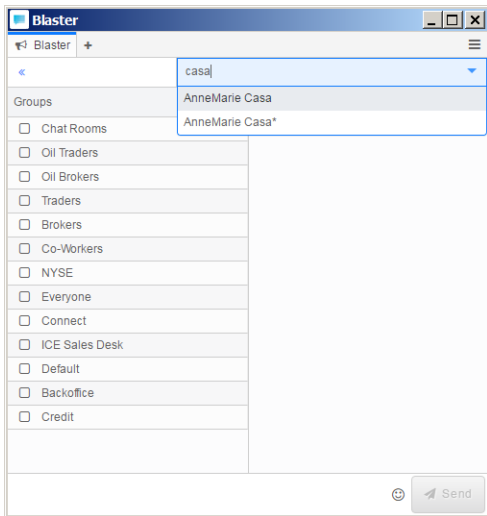
Send one message to multiple contacts and quickly pick and choose recipients within the **Blaster**. Each group you create is available to be blasted to.





### Sending Messages from the Blaster:

1. Select the group(s) you wish to send message to. This can include Chat Rooms.
2. You may also select/de-select users or chat rooms from the group(s) selected.
  - a. There are options for Contact Selection to select **None**, **All**, or **Toggle** between the currently selected and de-selected ones.
3. Type your message in the text entry area and Send.



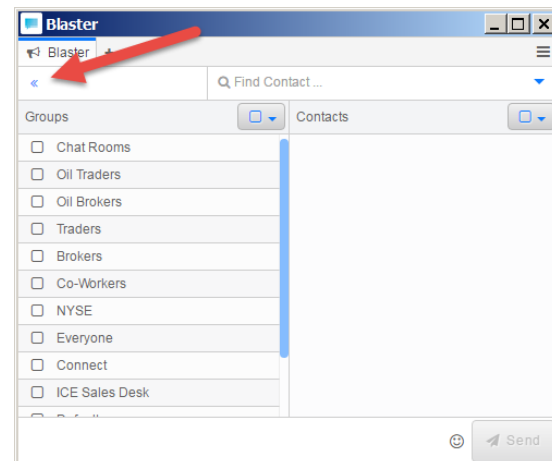
### Type Ahead and Multi-Select

ICE Chat offers the ability to quickly search for the contact(s) you wish to select as recipients via type-ahead search. Along with type ahead search you can perform multi-select functions in the blaster to quickly select/de-select recipients.

### Blaster Resizing

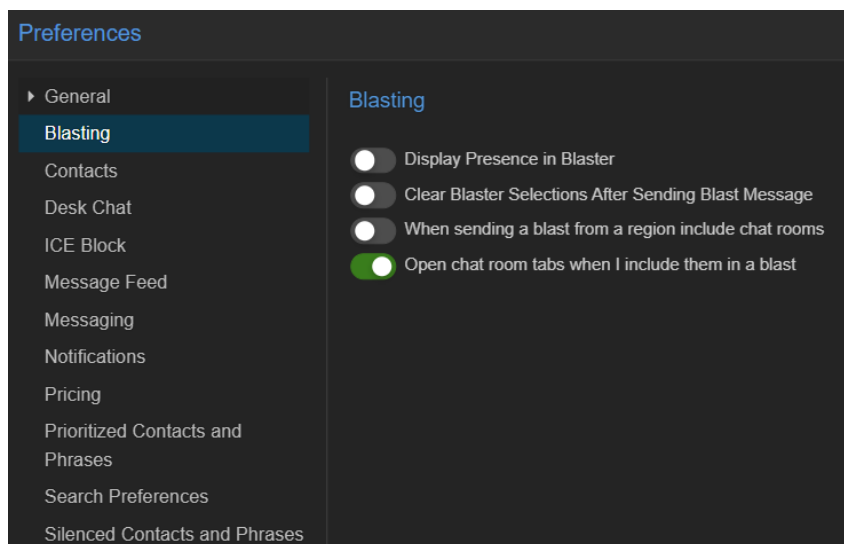
You can change the layout of the blaster by toggling the groups to be viewable via the icon in the top left.

The divider is now able to be dragged to resize the two regions of the blaster.



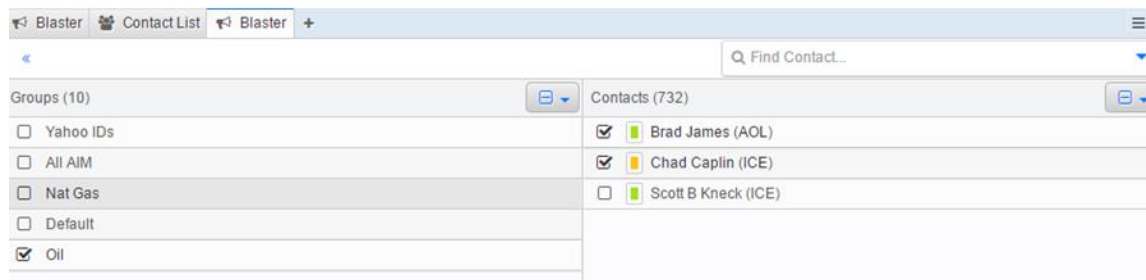
### CLEAR BLASTER SELECTIONS AFTER SENDING BLAST MESSAGE

Select **Preferences Icon** → **Blasting** → **Clear Blaster Selections After Sending Blast Message** to clear out all selected recipients in the Blaster after a message is sent.



## DISPLAY PRESENCE IN BLASTER

To view your contacts' presence in the Blaster go to Preferences → Blasting → Display Presence in Blaster. This will be off by default. If enabled your contacts will display presence in the Blaster.



## FILE AND IMAGE ATTACHMENTS (NEW)

ICE Data now offers functionality to send/receive attachments or images between ICE Chat users. ICE Data reserves the right in its sole discretion to limit the size and volume of attachments, or to remove attachments or images.

To send an attachment, simply click the attachment icon in your message entry window, or drag the attachment to the message send box. You will receive a confirm before sending the attachment. The attachment will be scanned for viruses prior to being made available.

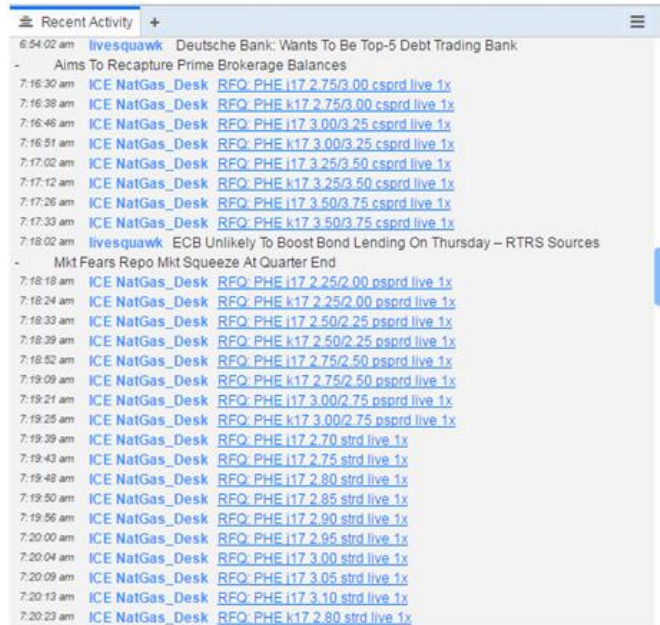
When an attachment is sent, the counterparty will be prompted to Accept or Deny the attachment. The user has 48 hours to accept it or the attachment will be expired. Once accepted, the file can be downloaded.

When sending an image, you will see a preview of the image in our attachment viewer window. Additionally, you can view any received images in an image preview within ICE chat.

Please see our Attachments Security and Compliance FAQ for more information.

## RECENT ACTIVITY(NEW)

**Recent Activity** consolidates and displays all incoming messages in chronological order. Use it as a “ticker” for your IMs and view messages as they are delivered without switching between tabs.



You can quickly respond to an IM from **Recent Activity** by clicking on the contact's ID. This will open a tab for the contact.

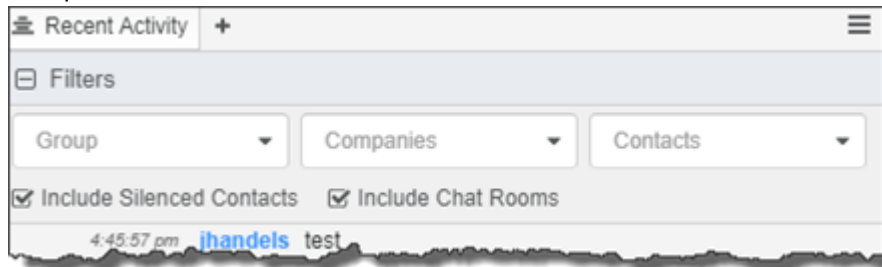
Recent Activity widgets can be filtered by groups and can include/exclude chat room messages.

Additionally, Recent Activity can be filtered by Product for Pro users.

### Filter Recent Activity Console

You can choose to hide silenced contacts, disclaimers, silenced phrases from your Recent Activity Console, and filter the console by Group, Company and Message Type, flagged messages and more. Click the + button to view and set available filters. You can also hide or include chat room messages.

Recent Activity consoles can also be renamed, making it easier to maintain multiple consoles with different filters.



# DESK CHAT

Desk chat allows a group / desk of users to chat internally as well as view all external chats between the contacts of the desk. The external recipient only communicates with one shared ID. Unlike a chat room, where each user must “join” a specific chat room and remain there to chat, desk chat propagates the message to each user attached to the desk ID.

## MANAGING DESK CONTACTS

When a member of a desk adds a new contact they can select to add a contact on behalf of:

- Individual – added contact can only be contacted by desk member who added them. Message would come from user’s individual account.
- Desk – added contact can be contacted by anyone on the desk. Message comes from desk handle.

When a contact is added as a Desk contact by one member of a desk, the contact is added to all members of the desk as a desk contact. All members of the desk will receive a notification of the accepted connection.

Desk contacts are distinguished with an asterisk (\*).

## DESK CHAT PREFERENCES

When sending a message to a desk contact you can choose whether you wish to display your user name. Under **Preferences Icon → Desk Chat** select **Insert My Username into Messages Sent from Desk Chat** to include your user name.

Desk message sent with the preference:

On: Desk123 (userID): this is a desk message

Off: Desk123: this is a desk message

When another member of your desk sends a message out to a desk contact you will receive a notification. However by default, the tab will not automatically open.

If you wish to have tabs opened when another member of your desk sends a message go to **Preferences Icon → Desk Chat** and select **Open Chat Tabs When Coworkers Send Desk Messages**

# DESK ACTIVITY WIDGET

The desk activity widget will display all of your desk messages in one tab. This tab includes all inbound and outbound messages for your desk.

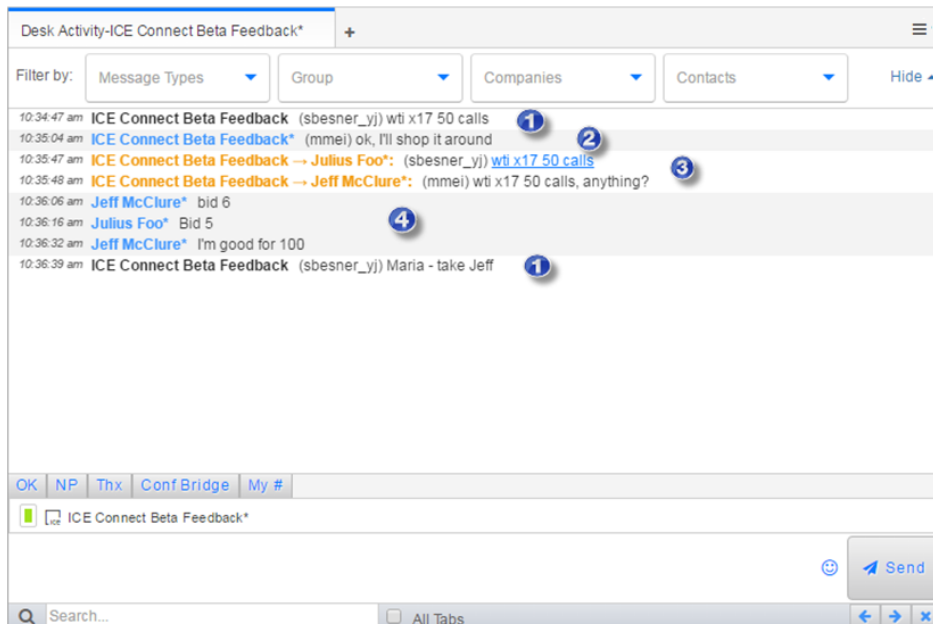
Sending messages in this widget will *only* send messages to your desk, *never* externally, just like your internal desk chat. This allows a desk to get a full picture of the markets they're working with their customers while interacting with their own, internal desk.

Although all external messages are displayed here, they are not seen by other external contacts. When an external contact needs to be contacted, clicking on their user name in the window will bring you directly to their tab.

The widget can be filtered to view the messages you wish to see and you can open multiple instances of the widget with different filters set.

Message types within the desk activity widget are:

- 1 Message sent by your to your internal desk.
- 2 Message sent by someone on your desk to your internal desk.
- 3 Message sent by anyone on your desk to an external desk contact, including blast messages to desk contacts.
- 4 Message received from any external desk contact.



# CHAT ROOMS

Chat rooms, which can be created on the ICE server, are fully compliant and controlled by each user's permissions. Users can be permissioned for the following access on chat rooms:

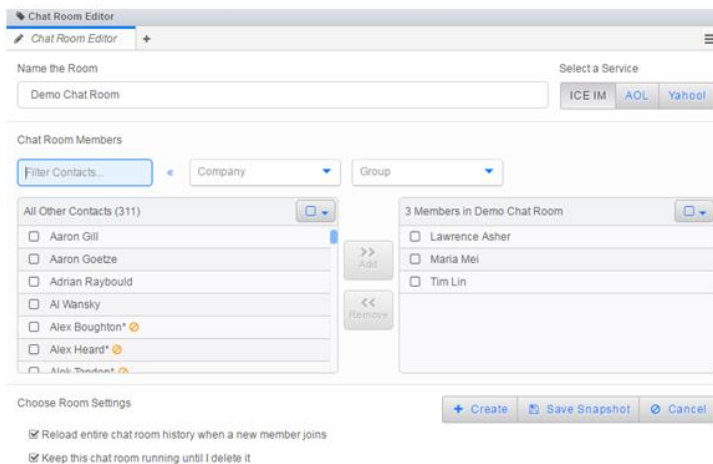
- **Restricted:** Access to chat rooms has been revoked
- **Company Only:** User can only participate in chat rooms with users from their company
- **Company +1:** User can participate in chat rooms with users from their company and one other company only
- **Full Access:** User can participate in chat rooms with any users

Once you've received permissioned access, you will be able to access your running chat rooms from your **Contact List** and/ or the **Chat Room List**. Snapshots will only be available in the **Chat Room List**.

## CHAT ROOM EDITOR

If the service type is ICE, you can:




- Determine whether members are able to view message history when they join by selecting or deselecting "Reload entire chat room history when a new member joins"; this is selected by default.
- You can make the room permanent or temporary by selecting or deselecting "Keep this chat room running until I delete it"; this is selected by default.
- You can name the room and select the service you want to create the room on. Inviting contacts is made easy via filtering by company, group, and/or type-ahead search.



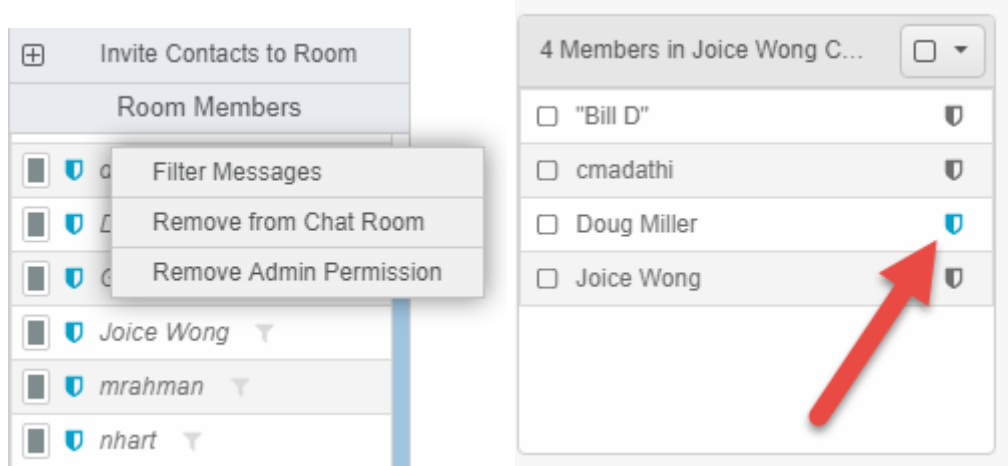
You can create snapshot templates of chat rooms for quick start up of a new room.

## CHATROOM PERMISSIONS:

Chatroom participants can be permissioned as General Members or Admins. Each role is designated with a shield icon.

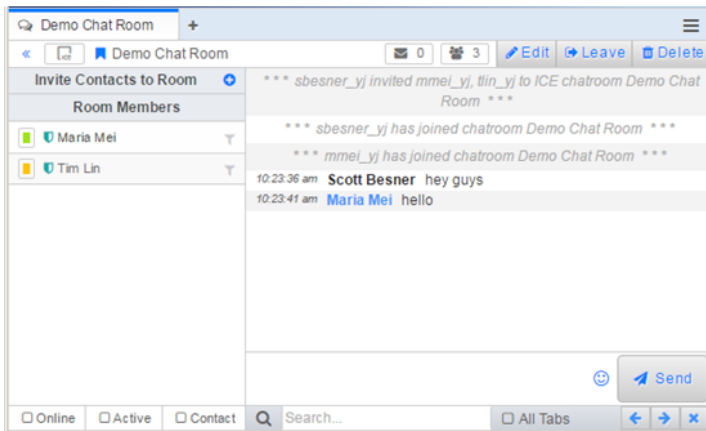
-  The Room Creator can rename the room, add or remove people, and add or remove Admin permissions from users.
-  The room Admin can add or remove people from the room, and can designate additional admins.
-  A room General Member cannot add or remove people from the room.

Click the shield icon on a member when setting up the room to toggle the user between Admin and General Member, or right click on a participant in the room roster to change their permission.



## CHAT ROOM TABS

All users will receive system generated announcements when another user has joined or left.



Action buttons:

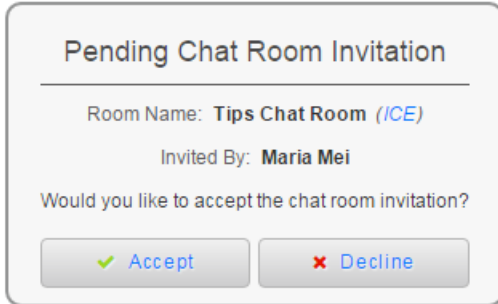
- **Edit** the room - add/remove participants
- **Leave** the room - you will receive no messages sent in the chat room but can rejoin at your convenience
- **Remove** the room - you will need to be re-invited to the chat room in order to participate. Room is removed from your platform.
- **Delete** the room (creator only) - chat room is deleted from the server for *ALL* participants.

You're able to:

- Invite other users (if you are an Admin or Room Creator)
- Remove other users
- Filter messages

If you are invited to a room, you will receive a Chat Room Invite that can be accepted or declined.

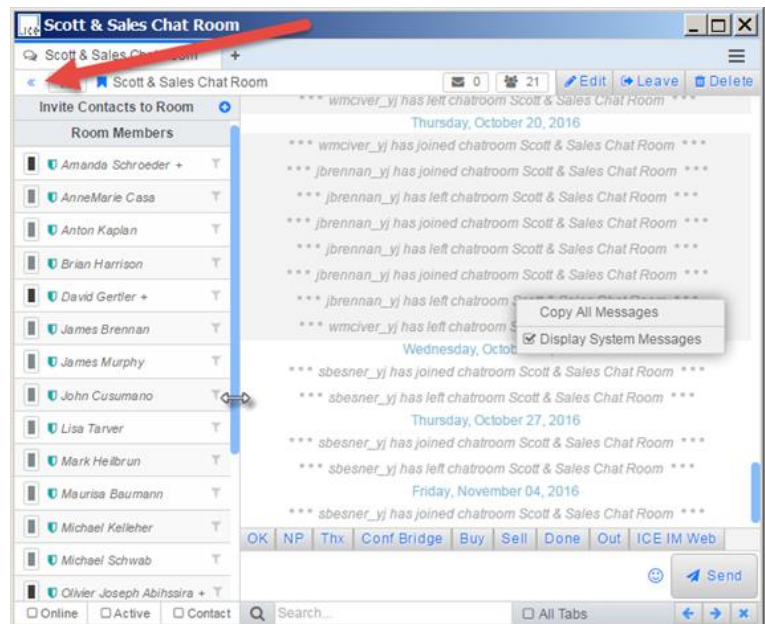




All active chat rooms will appear in your contact list as well as the **Chat Room List**.

### Chat Room Resize:

You can now choose to hide the side panel of a chat room or resize. To resize the side panel simply drag the divider to the desired size.



To show/hide the side panel there is a toggle in the top left corner of each chat room.

## CHAT ROOM LIST

Under **Running Chat Rooms** you will find a list of all the chat rooms you are currently a participant of; including information on the number of unread messages and the number of participants. All action buttons listed above are available in this widget as well.

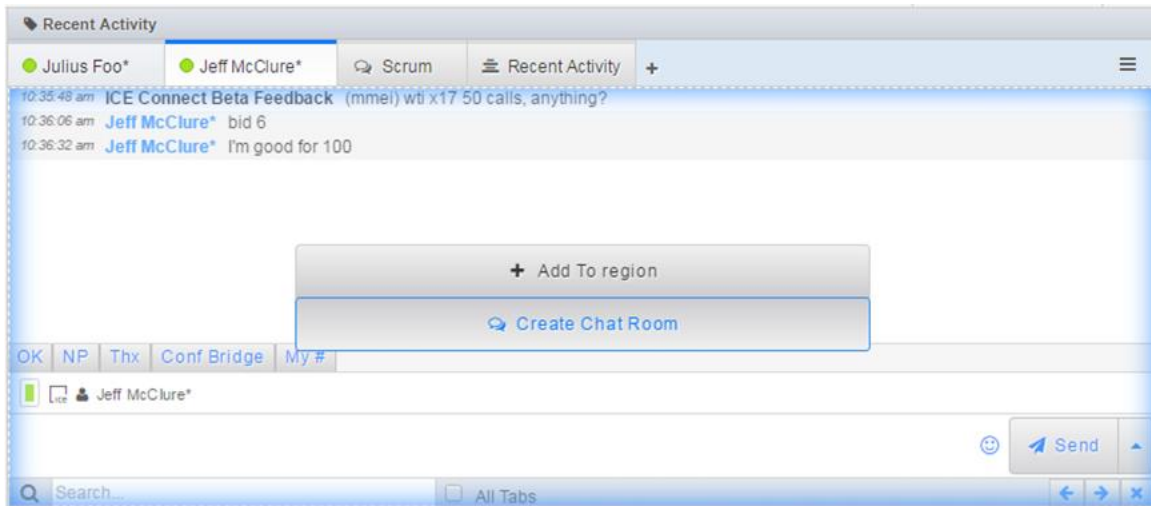
There is also a list of your **Saved Chat Room Snapshots**, which allow you to spin up a chat room from a template.

## SPIN OFF CHAT ROOM VIA DRAG AND DROP

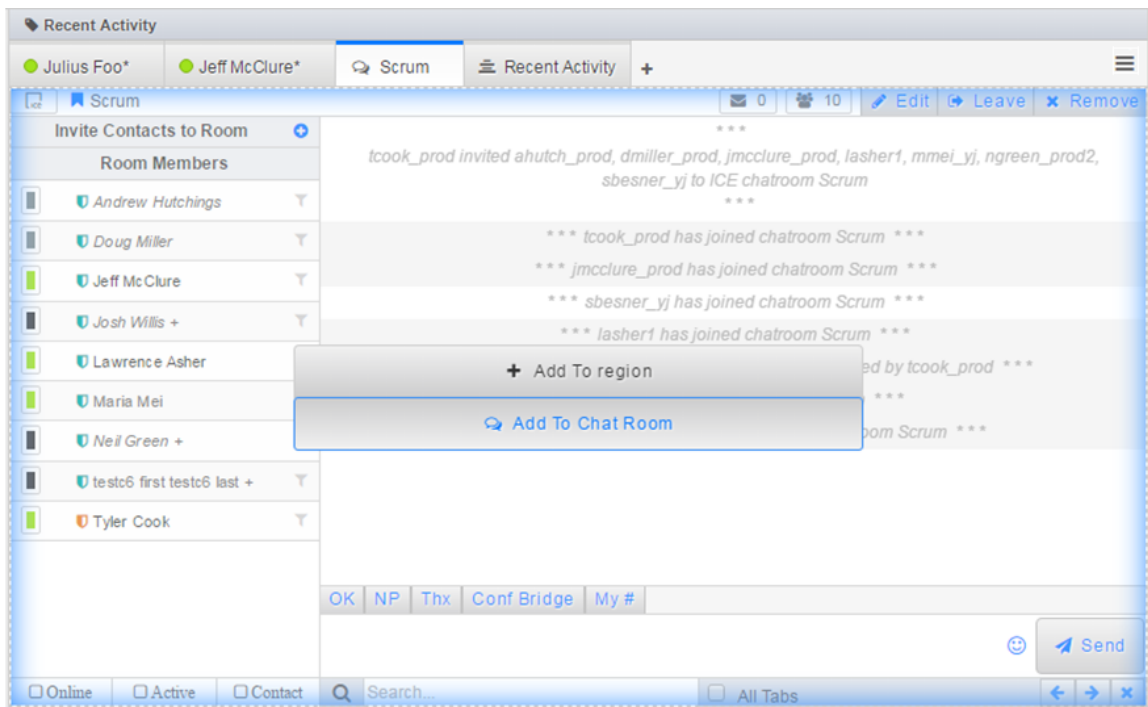
You can quickly spin up a chat room and add contacts to a chat room via drag and drop. While on the tab you want to spin off the chat room with, drag any other contact into the middle of the



region to see target drop points. Simply release the contact onto **Create Chat Room** to start up a chat room with the two contacts and you!

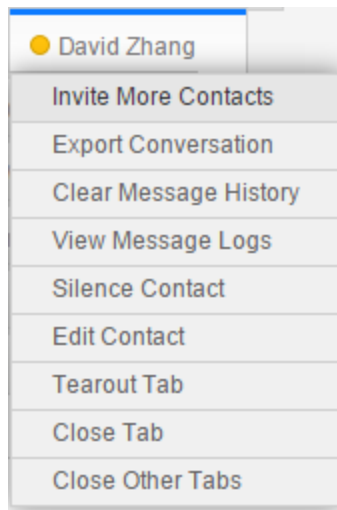


To add other contact(s) to any existing chat room, drag them into the middle of the chat room region and drop them on **Add To Chat Room**.



## SPIN OFF CHAT ROOM VIA RIGHT-CLICK

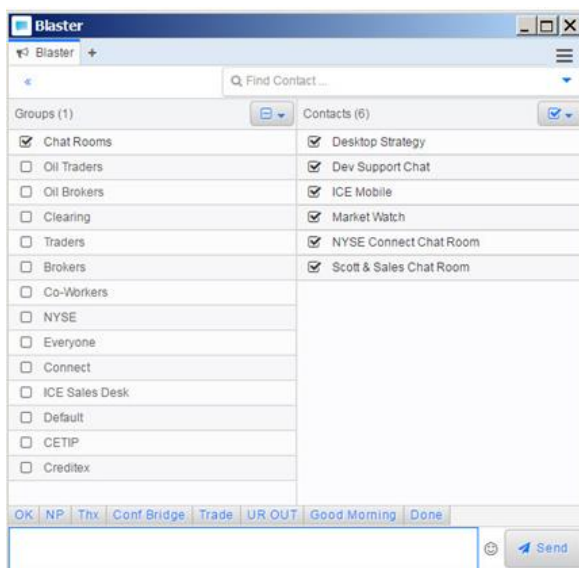
Clicking on a chat tab now offers the ability to invite more users to a chat room by selecting **Invite More Contacts**. This selection will bring you to the **Chat Room Editor** widget with the current contact selected.



From here you can select other contact(s) to invite to a chat room. Message history will not be carried over so new people joining will not see what was discussed previously.

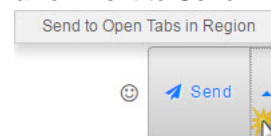
## BLAST TO CHAT ROOMS

Chat rooms can be selected as recipients of your blast messages. You can select which chat rooms to send a blast message to within the blaster or you can include them when blasting from a region.



If your Chat Rooms group isn't visible in the Blaster, right-click on the Chat Room group and select **Visibility → Blaster**.

Under **Preferences Icon → Blasting** select **When sending a blast from a region include chat rooms to include chat rooms when blasting from a region menu or from the arrow next to Send**.











Select **Open chat room tabs when I include them in a blast** if you want the chat room to open when included in your blast.

# MESSAGE PRIORITIES

With priority messaging you can play a custom sound and display a custom color tab every time a message is received from a specified contact or whenever a message contains a specified keyword. You can also indicate when you want a push notification sent to your phone.

You can set message priorities under the Notifications menu. Your default message priorities can be found by navigating to **Notifications → Message Defaults**. Here you can view or edit the default notification settings for messages received.

Default Message Colors and Sounds

Type	Color	Sound	Send Mobile Push Notifications	Remind Me	Send Email Notifications When I'm
Incoming Message		Default 	Always 	Never 	Away or Offline 
Incoming Desk Message		Default	Always Except between Never	Never	Never
Outgoing Desk Message		Default	Never	Never	Never
ICE Chat Rooms		Default	Always	Never	Never

Under **Notifications → Priorities** you have the ability to:

- View **Available Priorities** as well as create more of your own
- View predefined **Prioritized Keywords** and add your own keywords
- Define **Prioritized Contacts**





## PUSH NOTIFICATIONS (PNS) FOR CHAT ROOMS AND DESK MESSAGES

Under Preferences-> Notifications → Defaults a user is now able to select to send push notifications for missed messages in a chat room as well as for inbound and outbound desk messages.

For chat rooms, the PNS will be sent based on your status, whether you're away or offline, as well as if you're a member of the chat room.

For desk messages, the PNS will be sent based on your status, whether you're away or offline regardless of anyone else on the desk being available. This means that although a contact of the desk might see the desk as available, you can still receive PNS for those messages.

Default Message Colors and Sounds

Type	Color	Sound	Send Mobile Push Notifications	Remind Me	Send Email Notifications When I'm
Incoming Message		Default	Always	Never	Away or Offline
Incoming Desk Message		Default	Always	Never	Never
Outgoing Desk Message		Default	Always	Never	Never
ICE Chat Rooms		Default	Always	Never	Never

## EMAIL NOTIFICATIONS FOR MISSED MESSAGES




Similar to getting push notifications (PNS) for missed messages sent to your phone, you will now be able to have an email sent for your missed messages. This can be set from Notifications →

Message Defaults. A new column, Send Email Notifications When I'm is available with the following choices:

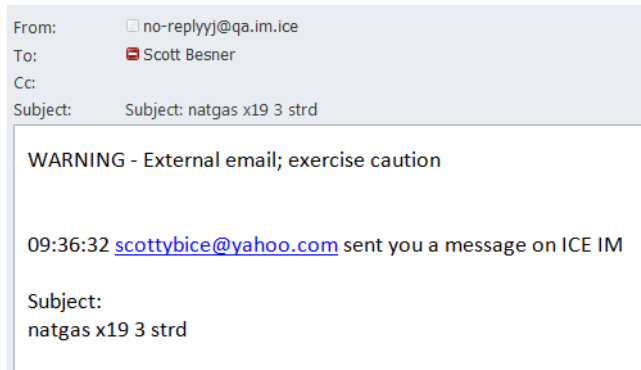
- Away or Offline - sends an email
- Away
- Offline
- Never

The email will be sent to the email you are registered for ICE Chat under. These emails for missed messages are batched on the server and delivered so as to not inundate you with emails.

Default Message Colors and Sounds ✕

Type	Color	Sound	Send Mobile Push Notifications	Remind Me	Send Email Notifications When I'm
Incoming Message		Default	Always	Never	Away or Offline
Incoming Desk Message		Default	Always	Never	Never
Outgoing Desk Message		Default	Always	Never	Never
ICE Chat Rooms		Default	Always	Never	Never



The email will come from ICE Chat with the message in the email.



## PLAY LOCALLY STORED SOUNDS FOR RECEIVED MESSAGES

You are able to select your own sounds for your incoming messages by going to the priority you wish to update and clicking the sounds file icon. This will allow you to browse your computer for your own .wav files to play when a message is received.

Default Message Colors and Sounds ✕

Type	Color	Sound	Send Mobile Push Notifications
Incoming Message		Default 	Always

## Priorities



Priority	Color	Sound	Send Mobile Push Notifications
1		Default	Always

## PLAY SOUNDS FOR ACTIVE TAB

Under **Preferences Icon->Notifications → Sounds Tab** you can select to **Play Sounds For Active Tab**. With this selected, your sounds will play for the active tab.

## SILENCING

Contacts, entire groups, disclaimers or specified phrases can be silenced within the platform. When silenced, the message is still received but no notification is displayed to the user. Silencing settings are found under **Preferences Icon->Notifications → Silencing**.

## REMINDER ALERTS

For each priority there is the ability to set a reminder alert so if a message tab has not been acknowledged, a new alert can be triggered. This is available for the **Message Defaults** and **Available Priorities**, both of which are found under the **Notifications** menu.

For each priority, the reminder alerts can be set under the **Remind Me** column. The default is set to **Never**, which means no reminder will be triggered. To enable a reminder, change **Never** to **After** and select the time period after which a new alert will be sent.

## Priorities



Priority	Color	Sound	Send Mobile Push Notifications	Remind Me
1		Default	Always	After 1 minutes and 0 seconds
2		Default	Always	Never
3		Default	Always	Never

### Color

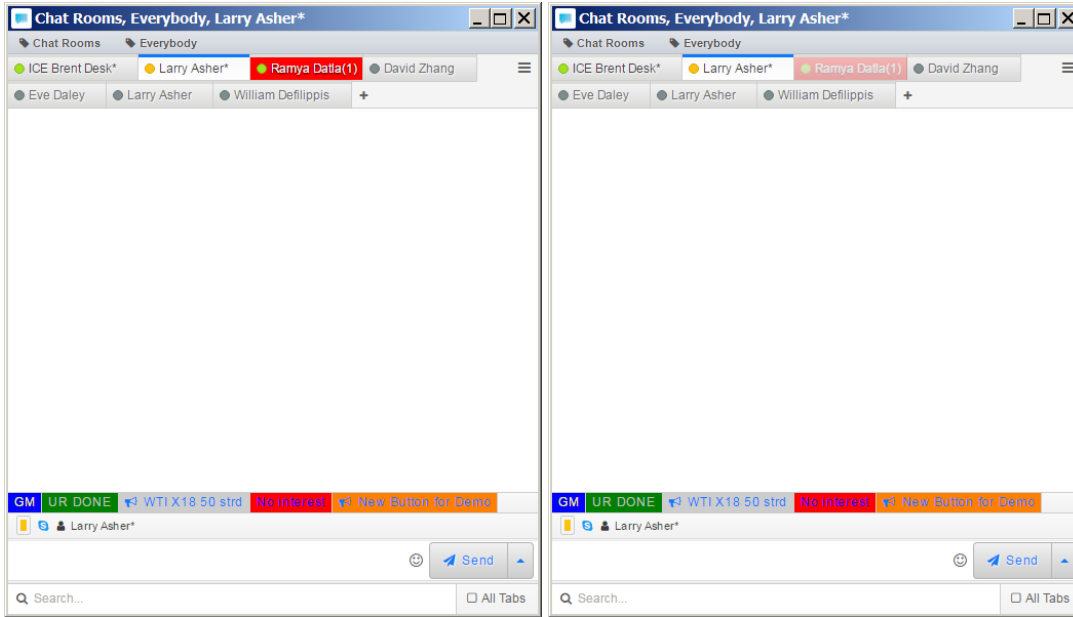


### Sound

(No Sound)

Add Priority

The alert will make the tab flash/pulse from a bright shade of the associated color as well as make the task bar flash.



## KEYBOARD SHORTCUTS

ICE Chat is shipped with 2 keyboard shortcuts allowing you to quickly navigate through your open tabs in a region. Keyboard shortcuts can be found under **Preferences Icon** → **General** → **Manage Keyboard Shortcuts**.

### Keyboard Shortcuts Manager

Name	Shortcut	Description
region:activate-next-tab	ctrl+tab	Go to the next tab in the region
region:activate-previous-tab	ctrl+shift+tab	Go to the previous tab in the region

Look for enhancements to this functionality in future releases.

## BELL

You can send ring a bell on your counterparties ICE Chat by clicking on the bell icon to the left of the send button. It will send a “Ring Ring!!!” message to your counterparty and play a sound if your counterparty has sounds enabled.

To disable the sounds on your ICE Chat, remove the message priority for the “Ring Ring!!!” keyword. You can also disable the bell icon completely by unchecking “Show bell shortcut in chat console” from your preference menu.

## CHAT SEARCH

Click the “Chat Search” shortcut button to search your message logs by keyword, contact, or date range. When a search is executed, we will show all hits in the Search Results window, along with the messages before and after the search hit for additional context.

From the Search Results window, you can click on the contact name to jump to their chat tab, or click on the magnifying glass icon to show the full conversation. To go back to search results, click the “Search Results” header on the page. You can also export your conversation to a CSV file by clicking on the document icon.

You can access the Chat Search screen from the Launch Menu, the Quick Launch Bar, or by using the “Message Search” functionality on a chat tab and clicking the Search Icon.

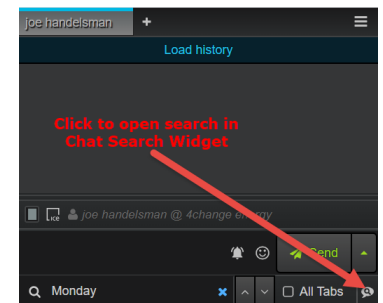
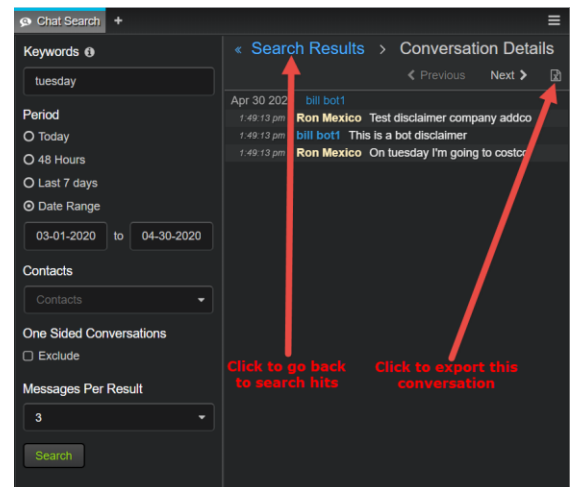
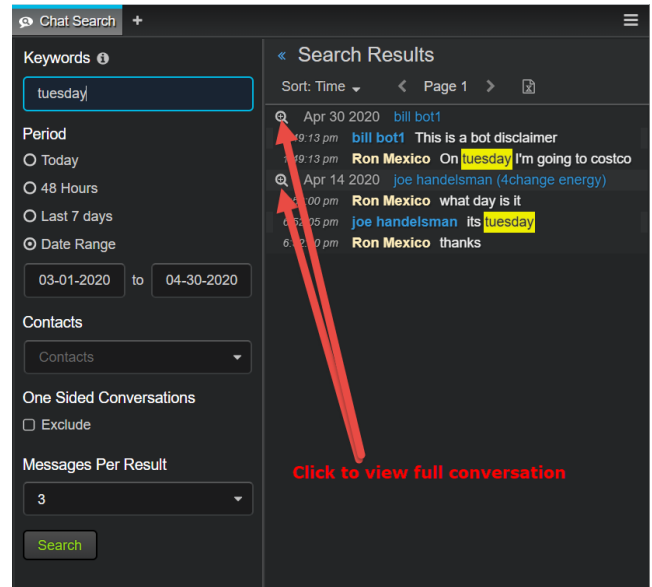
The search parameters include:

- Keyword - Boolean searches are supported using AND, OR, and NOT keywords. See the tooltip for additional formatting tips.
- Search Period
- Contacts - Defaults to All contacts, you can choose specific contacts or search on private messages, desk messages, or chat rooms.
- Exclude One Sided Conversations - You can choose to exclude one sided conversations. This will exclude results where the counterparty does not respond. ICE Chat will even ignore disclaimers and away messages for messages sent after May 1<sup>st</sup> 2020.
- Messages Per Result - You can select how many messages to show in the message preview per search hit. For example, if you select 3 messages we will show the message with the result and the previous and following message.

## MARKET SEARCH

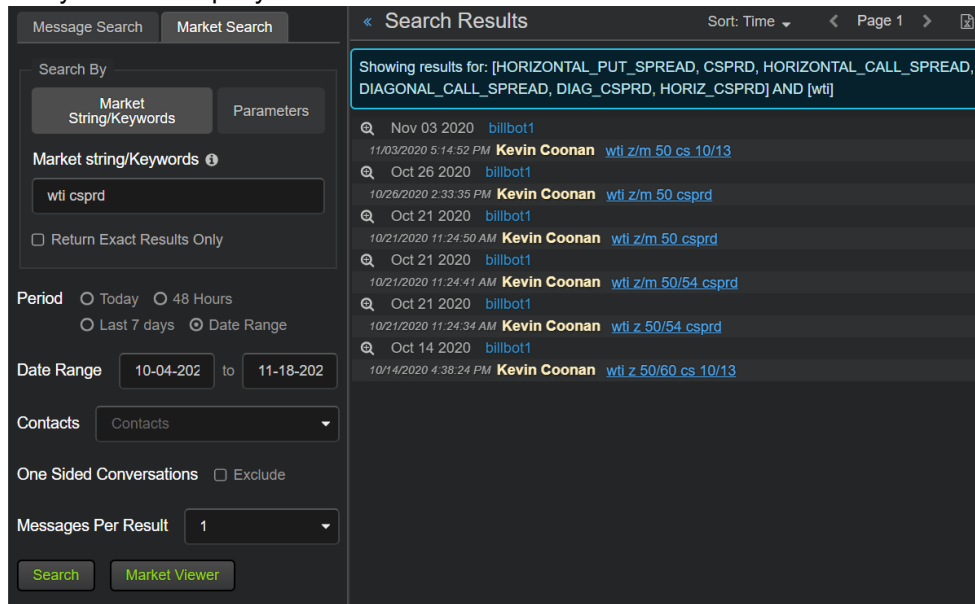
ICE Chat Pro users will now have access to search their message logs for specific markets. To access, click on the Market Search tab in the chat search widget and choose if you’re searching on market parameters or market strings and keywords. Please note that chatroom markets are not currently included in market search.

- Parameter Search- Select a combination of product name, structure, term, and hedged/not hedged.



- Click on “Strict term search” to match on term exactly. Otherwise, a search on Jan will also include terms that include Jan (like Q1, Cal21).
- Market String/Keywords Search - Simply enter the term, product, structure, or a full market string and ICE Chat will attempt to find matching markets.
  - Return Exact Results Only - This will return exact matches. For instance, a search on “wti Jun” will only return WTI June futures, rather than any WTI market with a June term.
- Click Search to view all matching conversations.
- Click Market Viewer to see a list of all matching markets, then choose which specific market to run a search on. Please note that the Market Viewer can be selected without any keywords or parameters to view all markets sent in a specified time period.

Please contact your sales rep if you'd like access to the market search tool.



## MESSAGE FLAGS

You can now flag a message in the message console, desk activity console, or recent activity console to follow up on later. To flag a message, simply click the flag icon to the left of the message. Flagged messages will also be flagged in all consoles that contain the message.

You can clear flags on each message by right clicking on a contact and selecting “Clear all Flags”, or by selecting “Clear all Flags” on a region, or by selecting “Clear all Flags” button in the Quick Access Tools.

Recent Activity and Desk Activity consoles can filtered to show only flagged messages, or priority messages.

Message Flagging can be disabled in the Preferences menu -> Messaging->Show message flags. Flags will be stored for 2 weeks.

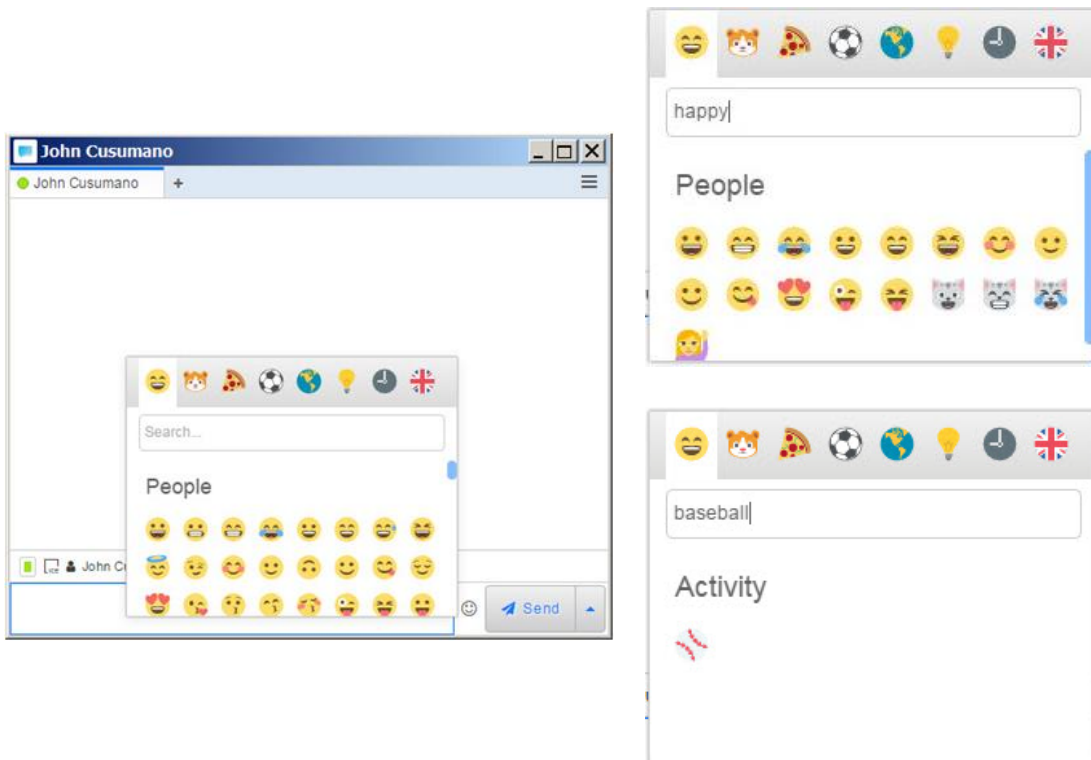


## EMOJIS

ICE Chat offers a set of emojis which contains search capabilities.

Emojis can be inserted by clicking on the emoji symbol next to the send button.

To search for an emoji, enter your term in the search box within the emoji selector.



## ADDITIONAL TIPS

The Chat platform has built in user shortcuts to improve your workflow.

### PREFERENCE TO SEND WITH ENTER KEY

The default in ICE Chat is to send a message when the enter key is struck. There is a preference to change this: **Preferences Icon->General → Send Message with Enter Key**.

### QUICK COPY

Copy and paste content from messages by clicking and dragging over the text. You can quick copy by clicking to the left of the text; this copies the text of the message excluding the timestamp and userID.

## DISABLE QUICK COPY

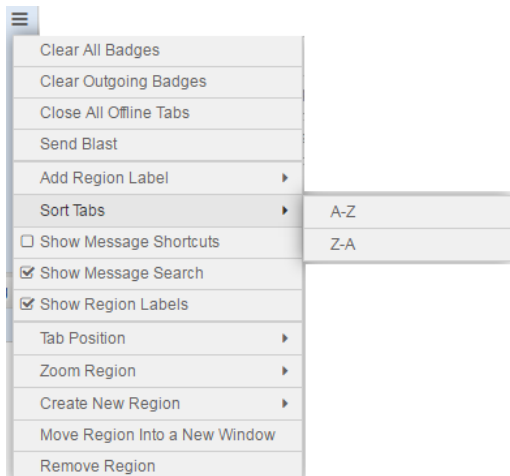
Quick copy can be disabled/enabled under **Preferences->Messaging**. There is a selection to **Disable Quick Copy**.

## COPY ALL MESSAGES

You can right-click in the body of a tab and select **Copy All Messages** to copy the entire message within the tab, including the timestamp and userID(s).

## QUICK SORTING OF TABS

This is only available while you're in manual sort mode. Quickly sort your tabs in each region on the fly with a menu choice in the Region menu. Click on the Region menu and select **Sort Tabs**. You can then select to sort them alphabetically (**A-Z**) or reverse-alphabetically (**Z-A**).



## EXPORT CONVERSATION

To export the conversation from the selected tab into a .txt file, right-click and select **Export Conversation**.

## CLEAR MESSAGE HISTORY

To clear out message history within a tab, you can right-click on the tab and select **Clear Message History**.

## VIEW MESSAGE LOGS

Need to see more history? Right-click on the contact's tab and select **View Message Logs**. This will load up the client area as a tab in a new window console with the logs between you and the contact selected.

**NOTE:** viewing logs is contingent upon your company's compliance recording preferences.

## SEND TO MESSAGE CONSOLES IN REGION

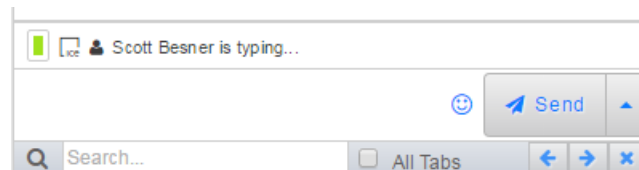
Quickly send a blast message to all contacts tabs open in a region by clicking the arrow next to Send and clicking **Send to Message Consoles in Region**. The message is sent to all open message console tabs within the region upon clicking.

## BLAST TO ALL OPEN TABS IN REGION

By clicking **Send Blast** under the **Region Menu**, the **Blaster** will be seeded with all contacts for whom a tab is opened in the region.

## TYPING NOTIFICATIONS

While you're on a tab, you are able to view whether or not your contacts are responding to you. If they are actively typing a message to you, their name in their tab will be underlined. In addition to the underline of the tabs who are currently typing, you will see "is typing" in the active message console.



Sending and receiving these notifications can be controlled by going to **Preferences->Messaging → Typing Notifications** and toggle:

- **Display Typing Indicators in Message Tabs** - controls seeing whether your contacts are actively typing to you
- **Send Typing Notifications** - controls whether you want your contacts to see that you are actively typing to them.

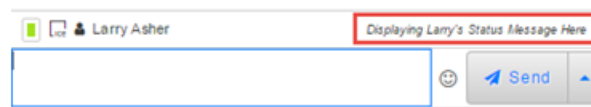
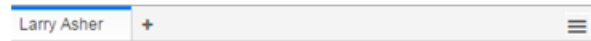
## DISPLAY PRESENCE ICON IN TABS

You can choose to view your contacts' presence icon on the chat tabs themselves to quickly see if a contact is available, away, or offline.

To enable this preference, go to **Preferences->Messaging** and select **Display Presence Icons in Chat Tabs**

## CONTACT STATUS IN MESSAGE CONSOLES

You can view your contacts' status message in the message console as well as the Contact List.



## CLEARING BADGES FROM NOTIFICATIONS MENU

You can quickly clear badges across the entire platform or for each region. To clear badges across the entire platform navigate to the Quick Access Tools and select **Clear All Badges** icon.



To clear badges for a specific region, click on the Region Menu and select:

- **Clear All Badges** - clears all badges within the selected region
- **Clear Outgoing Badges** - clears all outbound (desk) badges within the selected region

## TOASTER PREFERENCES

Toaster preferences can be found under **Preferences->Notifications → Toasters Tab**.

**Show Toasters On:** There are four choices of where to display the toasters:

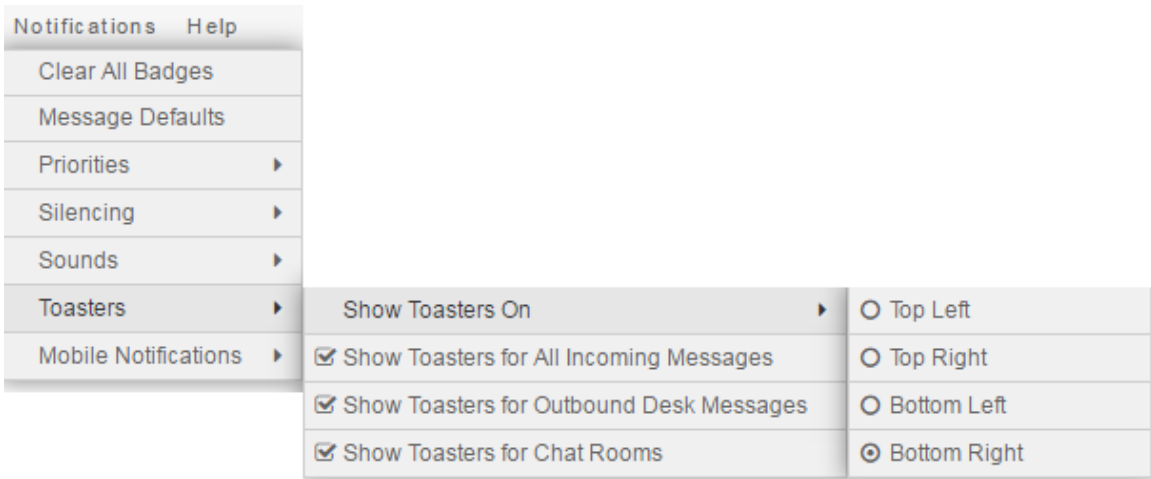
- Top Left
- Top Right
- Bottom Left
- Bottom Right (default)

The toasters will display in the location the user selected on the monitor where their “main” window displays.

**Show Toasters for All Incoming Messages:** This will control seeing the toaster pop-up for all inbound messages, including desk messages.

**Show Toasters for Outbound Desk Messages:** This will control seeing the toaster pop-up for all outbound desk messages.

**Show Toasters for Chat Rooms:** This will control seeing the toaster pop-up for all chat room messages.



## CLOSE ALL OFFLINE TABS

When you wish to “clean up” your message console and remove those users who are no longer online, click on the **Region Menu** and select **Close All Offline Tabs**.

## CLOSE OTHER TABS

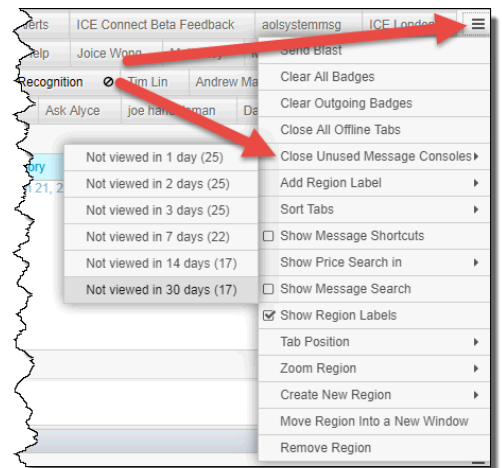
While on a tab, right-click and select **Close Other Tabs** to close all tabs except the one you’re actively on.

## CLEAN UP UNUSED TABS

Now you can clean up your workspace quickly by clicking on the region menu and selecting “Close Unused Message Consoles”. You can close tabs not viewed in 1, 2, 3, 7, 14 or 30 days.

## DISPLAY SYSTEM MESSAGES IN CHAT ROOMS

A toggle has been added via right-click to allow a user to display or hide the system messages in chat rooms. Right-click anywhere in the message history of a chat room to select / deselect **Display System Messages**.



## REMOVE UNDERLINE OF RECOGNIZED MARKETS

A preference is added to change the display of recognized markets from the blue, underlined text to the same as “regular” text. The recognized markets will retain all their functionality.

Go to **Preferences → Messaging → Underline Recognized Markets** to toggle this off and on.

Preference Set to Display with Underline



Preference Set to Display without Underline



## TEAROUT ON DOUBLE CLICK

A new preference is added to control tearing out a tab when double clicking. This preference is found under **Preferences → Messaging → Open Tabs in New Console on Double Click**. This will be selected by default which tears a tab out into its own window when double clicked.

Deselecting the preference will disable this.

## SET DEFAULT WINDOW SIZE

When you resize a window, the size will be saved and automatically set as the default size for all new windows opened.

## DISPLAY TIME IN 24 HOUR FORMAT

Click on your preferences icon → Messaging to toggle timestamp display to use 24 hour formatting.

## SMART TEXT RECOGNITION

ICE Chat offers proprietary message recognition technology which turns market messages into market data. Connect an analytics model to ICE Chat and get instant feedback on buy/sell opportunities.

ICE Chat allows the customization of the message data views; Display the data you want wherever you want.





## DEFAULT PRODUCT FOR CONTACTS

To properly utilize our proprietary recognition engine, ensure your contacts are set with the proper default products. If one is not set properly, you must specify the product you're sending a market on. You can set a contact's default product by editing the contact.

## INLINE DISPLAY

Once enabled for recognition, the message views can be set to display analytics and pricing in the message layouts themselves. The following pieces of data will be available as tools, all of which can be added or removed in the message layouts as desired. The data tools can be added in any order via drag and drop functionality.

## AVAILABLE TOOLS

<u>Name</u>	<u>TOOL DISPLAY</u>
Theo Indicator	 Based on preferences for colors.
Open ICE Order Ticket	
ICE Price Indicator	
hh:mm:ss user message	9:46:53 am <a href="#">Scott Besner</a> <a href="#">brent k18 40/45 csprd 3.7/3.9</a>
Theo	3.92
Theo with Color	3.93 3.93
Delta	Δ 7.06
Residual Delta	Res Δ -3.02
Gamma	Γ -0.54
Vega	v -0.043
Theta	Θ 0.002
ICE Bid	B: 3.75
ICE Bid Quantity	BQty: 100
ICE Offer	O: 4.05
ICE Offer Quantity	OQty: 100
Under Price	UnderPr: 53.75
Last Trade	Last Trade: 3.75
Open Pricer	
New Line (Line Break)	↵ New Line
Tab	Tab
Reprice	

## PRICING PREFERENCES

All ICE Chat users can send and receive markets to and from their counterparties. However, to take advantage of the added recognition functionality special permissions are required.

Once permissioned a new menu option, **Pricing**, will be available under **Preferences**.

## PRICING SOURCE

There are two selections to get pricing in ICE Chat:

1. **Trade (Application):** sends the analytics and pricing values through from the **Trade** application. These values will come through whether the pricing api or Options Analytics is being used in **Trade**.
2. **Options Analytics (Server):** uses the valuations from ICE Options Analytics

## LAYOUTS

ICE Chat offers full customization of the message layouts once permissioned for recognition. Four predefined layouts are provided. Note that the only portion of the message layout which *cannot* be broken up is the timestamp, sender, and message.

hh:mm:ss pm Sender message...

### BASIC DOCKED



- This layout does not change the current layout of the messages.
- There is no inline data and all analytics and pricing is displayed in the market pricer at the bottom of the consoles.



Drag tools here hh:mm:ss pm Sender message... Drag tools here

9:41:27 am Scott Besner [brent k18 40/45 csprd](#)

### DOCKED






- This layout adds a theo indicator to the left of the message timestamp as well as an ICE indicator when there is a better price on ICE for the same market.
- All analytics and pricing is displayed in the market pricer at the bottom of the consoles.

  hh:mm:ss pm Sender message... Drag tools here

  9:46:53 am Scott Besner [brent k18 40/45 csprd 3.7/3.9](#)

### BASIC

- This layout adds a theo indicator to the left of the message timestamp as well as an ICE indicator when there is a better price on ICE for the same market.
- A new line break and a tab space are added after the message, creating a new line for the analytics data.
- On the new line will be a colored theo price and the delta.

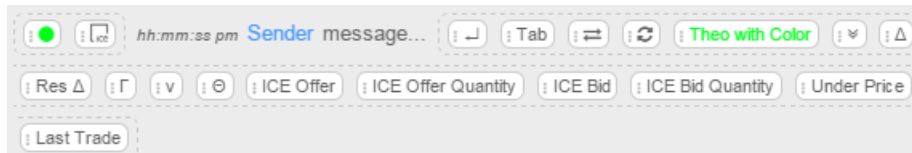
  hh:mm:ss pm Sender message...   



9:46:53 am Scott Besner brent k18 40/45 csprd 3.7/3.9  
3.92 Δ 7.09

## ALL TOOLS

- The All Tools layout will add all available tools to the message layout.
- To the left of the message timestamp will be a theo indicator as well as an ICE indicator when there is a better price on ICE for the same market.
- A new line break and a tab space are added after the message, creating a new line for the analytics data.
- On the new line will be all of the available tools.



9:46:53 am Scott Besner brent k18 40/45 csprd 3.7/3.9  
3.92 Δ 7.09 Γ -0.54 v -0.043 Θ 0.002 O: 4.05 OQty: 100 B: 3.75 BQty: 100 UnderPr: 53.75 Last Trade: 3.75

## CUSTOMIZE LAYOUTS

The predefined layouts can be customized as desired by simply dragging and dropping tools into and out of the layout as well as reordering.

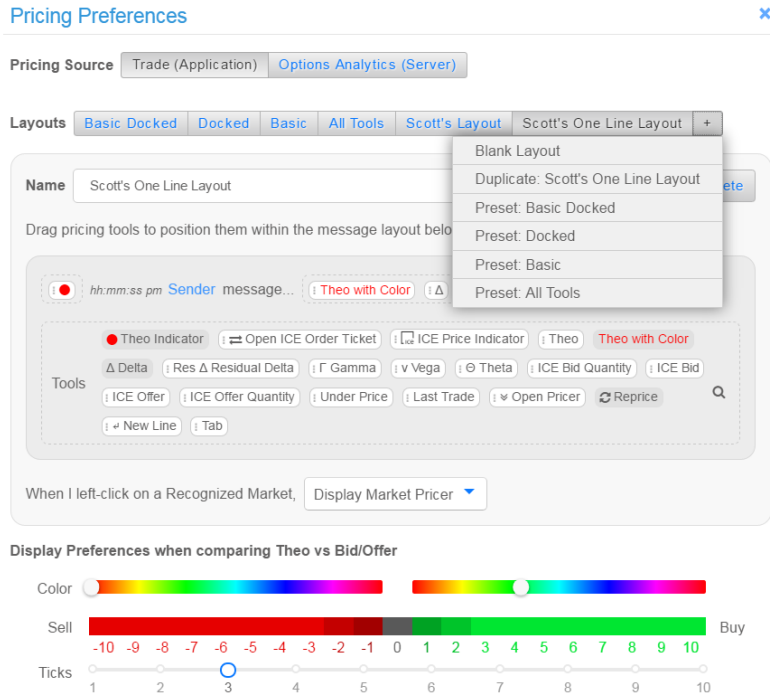
All changes are updated and saved dynamically for the layouts.

9:46:53 am Scott Besner brent k18 40/45 csprd 3.7/3.9 3.92 Δ 7.09 Γ -0.54

9:46:53 am Scott Besner brent k18 40/45 csprd 3.7/3.9  
3.93 Δ 7.06 Γ -0.54 v -0.043 Θ 0.002

## CREATE NEW LAYOUTS

Clicking the “+” button on the Layouts layer provides the ability to create a new blank layout or add any Preset layouts. Likewise, the ability to duplicate the selected layout will be available.



## COPY LAYOUTS

By selecting a layout and then clicking on the drop-down arrow, an option to **Copy Layout** is presented. Clicking this will copy the layout. From there, the layout can be customized.

## DELETE LAYOUTS

Select the layout to delete and click the Delete button.

## LEFT-CLICK PREFERENCE

For all layouts, there is a preference for the left-click action on a recognized market. **When I left-click on a Recognized Market**,

- **Display Market Pricer** - opens the market pricer in the bottom of the consoles
- **Open in Watch Tab** - selects the market in the Market Watch in **Trade**.

## DISPLAY BUY AND SELL OPPORTUNITIES

The colors displayed for buy and sell opportunities can be configured as well. This will be under **“Display Preferences when comparing Theo vs Bid/Offer”**.

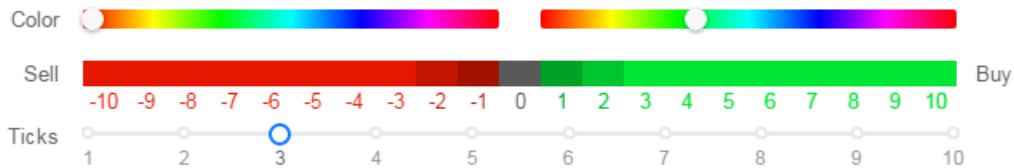
These colors will affect the **Theo Indicator** tool as well as the **Theo with Color** tool.

- Select the base color for **Sell** and **Buy** opportunities from the respective sliders. The default base colors are red for a sell opportunity and green for a buy opportunity.

- Select the number of ticks to shade the **Theo Indicator** and **Theo with Color** tools by. The default number of ticks is 3.
- Once the selections are made, a preview of the various shadings will be displayed in the color sliders.

Default settings for the preferences:

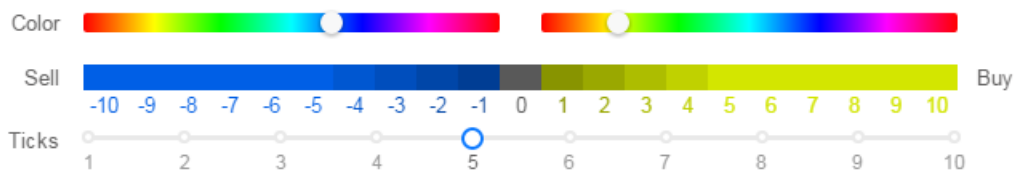
Display Preferences when comparing Theo vs Bid/Offer



9:41:27 am	Scott Besner	<a href="#">brent k18 40/45 csprd</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
9:41:56 am	Scott Besner	<a href="#">brent k18 40/45 csprd 3.7/4.1</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
9:44:33 am	Scott Besner	<a href="#">brent k18 40/45 csprd 3.7/4.1</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
9:45:57 am	Scott Besner	<a href="#">brent k18 40/45 csprd 3.9/4.1</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
9:46:10 am	Scott Besner	<a href="#">brent k18 40/45 csprd 3.95/4.1</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
9:46:53 am	Scott Besner	<a href="#">brent k18 40/45 csprd 3.7/3.9</a>	3.93	Δ 7.06	Γ -0.54	v -0.043	Θ 0.002
10:04:56 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .28</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:05:25 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d .24/28</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:05:39 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d .25/28</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:05:45 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d .26/28</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:06:10 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .22</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:06:16 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .21</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007
10:06:19 am	Scott Besner	<a href="#">brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .20</a>	0.23	Δ 6.25	Γ 6.16	v 0.004	Θ -0.007

Customized settings for the preferences:

Display Preferences when comparing Theo vs Bid/Offer



9:41:27 am	Scott Besner	brent k18 40/45 csprd
9:41:56 am	Scott Besner	brent k18 40/45 csprd 3.7/4.1
9:44:33 am	Scott Besner	brent k18 40/45 csprd 3.7/4.1
9:45:57 am	Scott Besner	brent k18 40/45 csprd 3.9/4.1
9:46:10 am	Scott Besner	brent k18 40/45 csprd 3.95/4.1
9:46:53 am	Scott Besner	brent k18 40/45 csprd 3.7/3.9
10:04:56 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .28
10:05:25 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d .24/28
10:05:39 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d .25/28
10:05:45 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d .26/28
10:06:10 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .22
10:06:16 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .21
10:06:19 am	Scott Besner	brent Jun17 54.50/55.00 callspread vs 54.63 10d offer .20

## THEO INDICATOR

The Theo Indicator tool will display as a colored circle displaying when there is a buy/sell opportunity, based on the preference settings, when there are prices sent/received on the IM markets. Should there be no buy/sell opportunity the neutral indicator is a gray circle.

If no prices are included on the IM markets or a market was reloaded the Theo Indicator tool will display as a dash, clearly indicating there was no price to check against the model.

9:41:27 am Scott Besner brent k18 40/45 csprd

## DECIMAL PLACES FOR ANALYTICS

If the Pricing Source is set to Trade (Application) the decimal places will be displayed as they are set within the Trade application.

If the Pricing Source is set to Options Analytics (Server) there is a slider to select how many decimal places to display the analytics.

Pricing Source  Trade (Application)  Options Analytics (Server)

Decimal places for Analytics  .00 .000 .0000 .00000 .000000

## MARKET PRICER

The market pricer is available on the bottom of the consoles and can be displayed based upon the left-click preference being set to **Display Market Pricer** or by adding the **Open Pricer** tool into any views and clicking that.

brent k18 40.00/45.00 csprd 3.70/3.90 4/20/2017, 9:46:53 AM

BQty: 100	B: 3.75	3.92 <span style="color: green;">▲</span> 7.09 <span style="color: red;">▼</span> -0.54 <span style="color: blue;">v</span> -0.043 <span style="color: gray;">Θ</span> 0.002	O: 4.05	OQty: 100
UnderPr: 54.54 Last Trade: 3.75				

The layout of the market pricer is not customizable and contains the following information.

In the top left of the market pricer will be the ICE Chat standardized string for the recognized market. This will show confirmation of what was actually recognized and constructed by the ICE Chat recognition engine.

In the top right of the market pricer will be the timestamp of the message along with a **Reprice** tool, an action menu, and ability to close the pricer itself.

**BQty, B, O, and OQty:** These four fields represent the ICE screen prices for the same market if available. The Bid and Offer fields will have the **Open ICE Order Ticket** tool to quickly allow for order entry on the Trade application.

**Theo with Color** tool will display the theo returned from the pricing source colored if a potential buy or sell opportunity is there based on the preferences.

**Delta [Residual Delta], Gamma, Vega, Theta** are all returned from the pricing model.

Clicking on the **Reprice** tool will update the analytics data for the market loaded in the pricer. The timestamp will update with the time the new pricing data was received.


The action menu contains the action items available for the market in the pricer, much like the right-click menu on a recognized string. These actions are documented in the User Interactions section.



## USER INTERACTIONS FOR RECOGNIZED MARKETS

The actions available for recognized markets are based on permissions and user preferences.

### THEO INDICATOR - PIN MARKET

Clicking on the **Theo Indicator** tool will pin a market to the Market Watch tab in the Trade application. The theo indicator tool itself will change to a pin icon indicating that the market was successfully pinned to the market watch tab.

 9:46:53 am [Scott Besner](#) [brent k18 40/45 csprd 3.7/3.9](#)

  9:46:53 am [Scott Besner](#) [brent k18 40/45 csprd 3.7/3.9](#)

### OPEN PRICER

Use the **Open Pricer** tool to view the docked market pricer on the bottom of the console for more information.

brent k18 40.00/45.00 csprd 3.70/4.10 4/20/2017, 9:46:53 AM   

BQty: 100	B: 3.75 	3.92 $\Delta$ 7.09 $\Gamma$ -0.54 $\nu$ -0.043 $\Theta$ 0.002	O: 4.05 	OQty: 100
UnderPr: -- Last Trade: 3.75				

### REPRICE

Click the **Reprice** tool to refresh the analytics for the market.

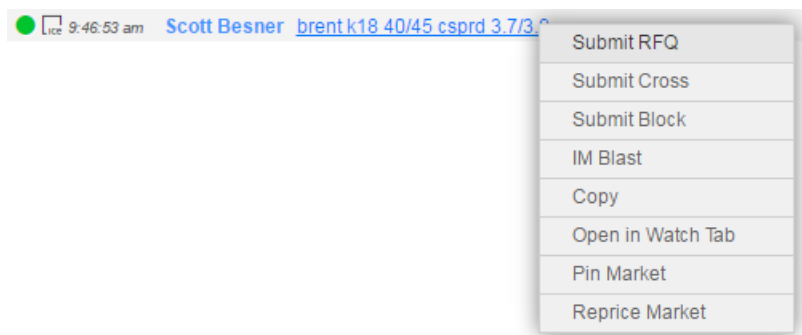
## LEFT-CLICK

On the preferences screen there is a setting for the left-click action. When I left-click on a Recognized Market, has two choices available:

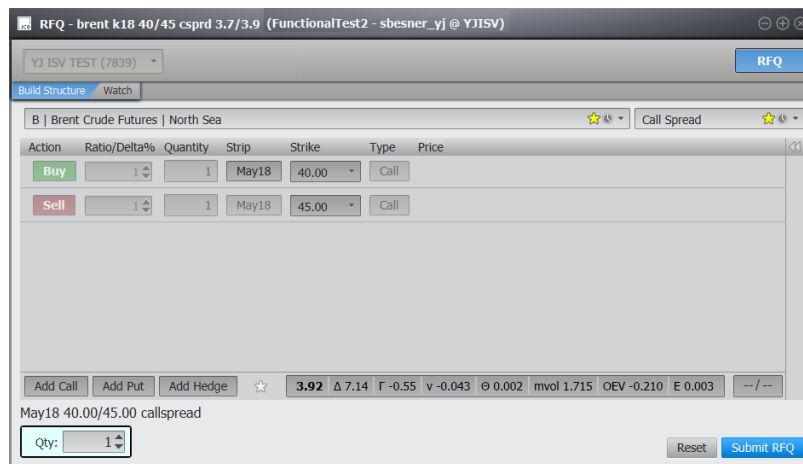
- **Open in Watch Tab** - brings the market into focus in the Market Watch tab in Trade.
- **Display Market Pricer** - opens the Market Pricer in the bottom of the ICE Chat console.

## RIGHT-CLICK

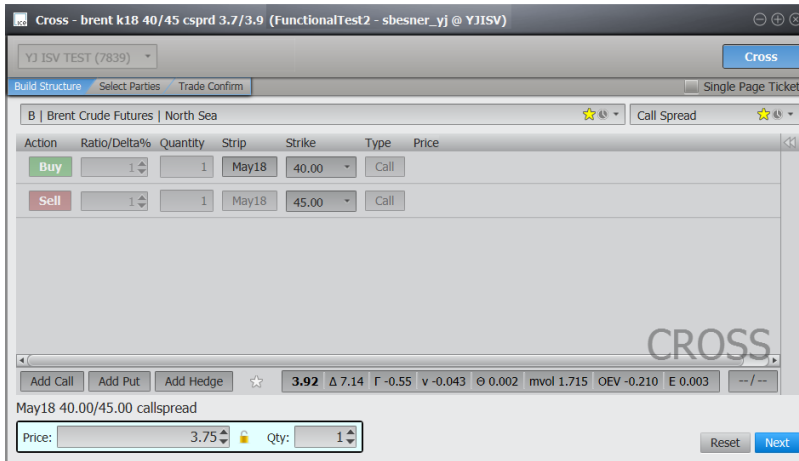
The right-click menu will be available on all recognized markets. Available options are dependent upon user permissions.



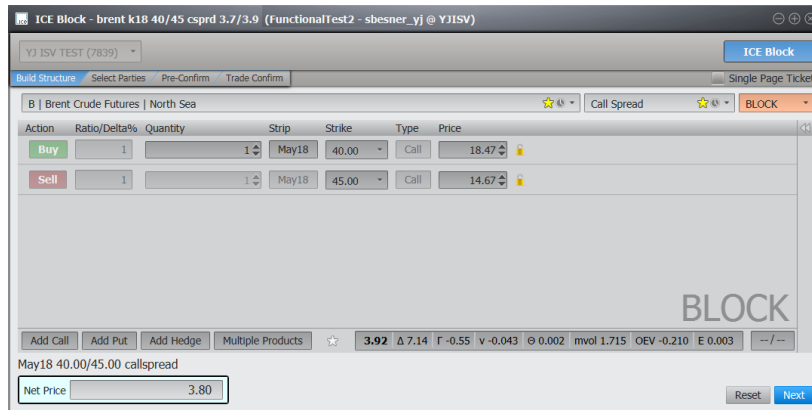
- **Submit RFQ** prepopulates the RFQ Wizard in Trade. \*\*



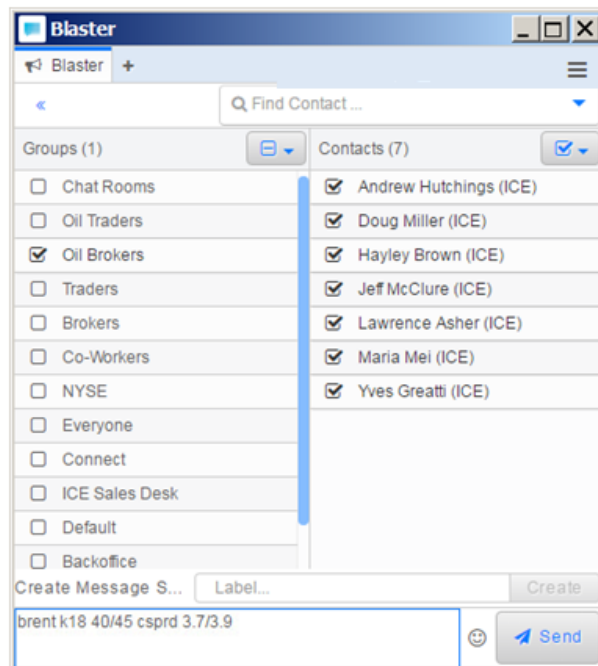
- **Submit Cross** prepopulates a crossing order ticket in Trade. \*\*



- **Submit Block** prepopulates a block order ticket in Trade. \*\*



- **IM Blast** prepopulates the ICE Chat Blaster with the recognized market string.



- **Copy** copies the market string.
- **Open in Watch Tab** brings focus to the market in the market watch tab
- **Pin Market** pins market to the top of the market watch tab

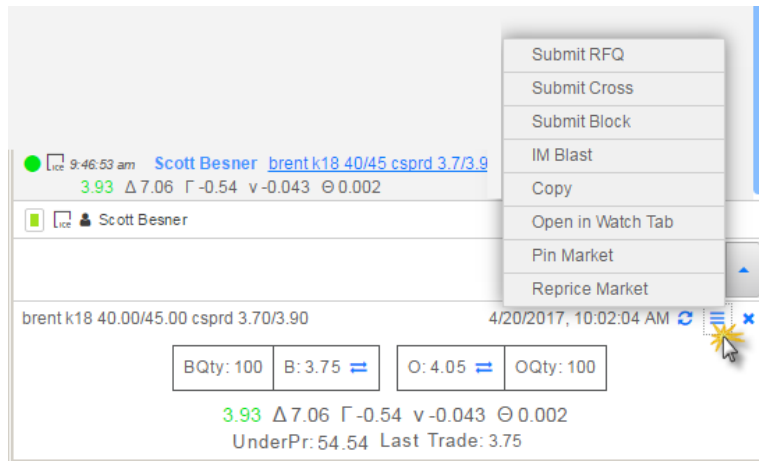
St.	+/-	Updated	Type	Contact	CC	Strip	Description	RFO	Sell	B Qty	Bid	Theo	Offer	O Qty	Buy
3.92	Δ: 7.14	Γ: -0.55	v: -0.043	Θ: 0.002	mvol: 1.715	OEV: -0.210	ε: 0.003	UnderPr: --	Last	Updated: 16:30:47					
0		11:38:07	IM-R	Scott Besner	B	May18	brent k18 40.00/45.00 csprd 3.70/3.90				3.70	3.92	3.90		

- **Reprice Market** reprices the market's analytics.

**\*\* Requires an ICE account with permissions to Trade and/or Block. \*\***

### ACTION MENU IN MARKET PRICER

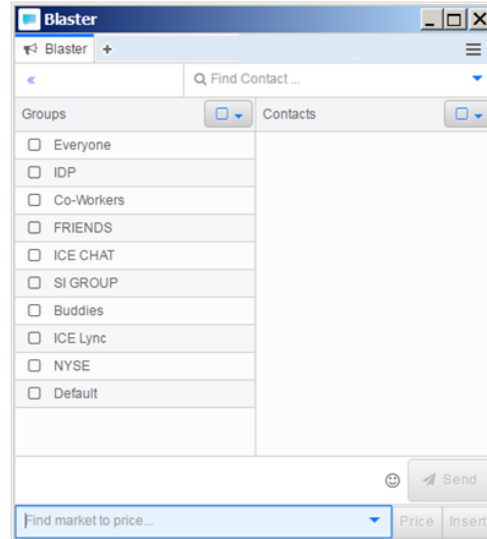
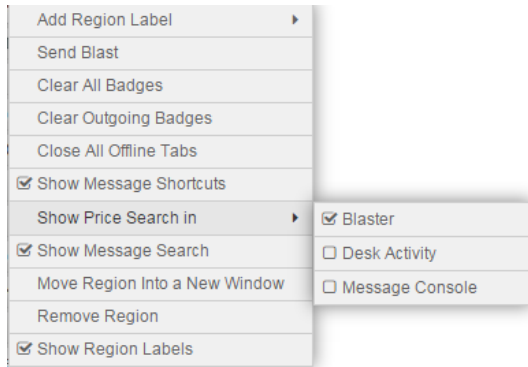
The action menu found in the market pricer will have the same menu options as the right-click menu described above.



### PRICE SEARCH

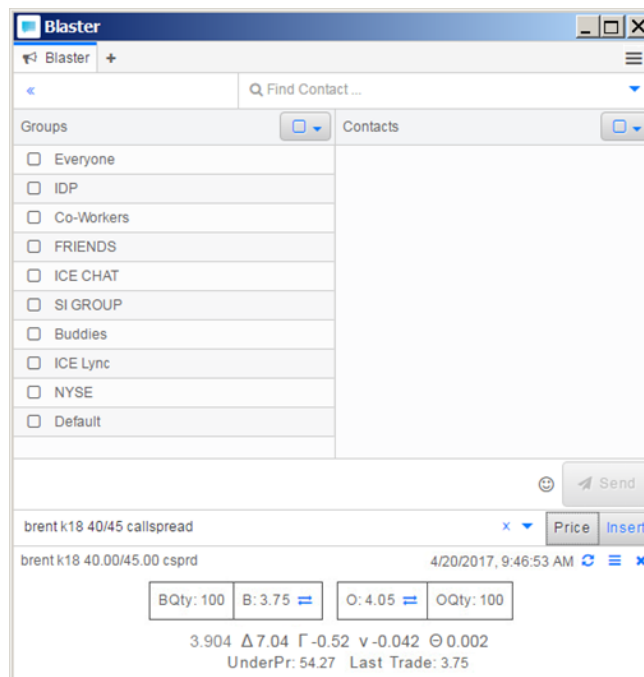
The Price Search functionality provides the ability to price markets prior to sending. The price search is available in the blaster by default and can be added to the message consoles and desk activity widget if desired. It can be toggled off/on in any of these widgets from any of the region menus.





## PRICE A MARKET

- Type a market into the field **Find market to price...**
- Price the market by:
  - Clicking the Price button
  - Hitting the Enter key
  - Hitting F9

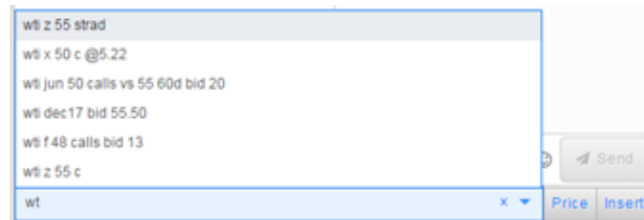


- Click **Insert** to populate the market into the text entry area and **Send** when ready.

## REPRICE AND RESEND MARKETS

The price search text entry field is also a type-ahead drop-down displaying the last ten recognized markets priced and/or sent.

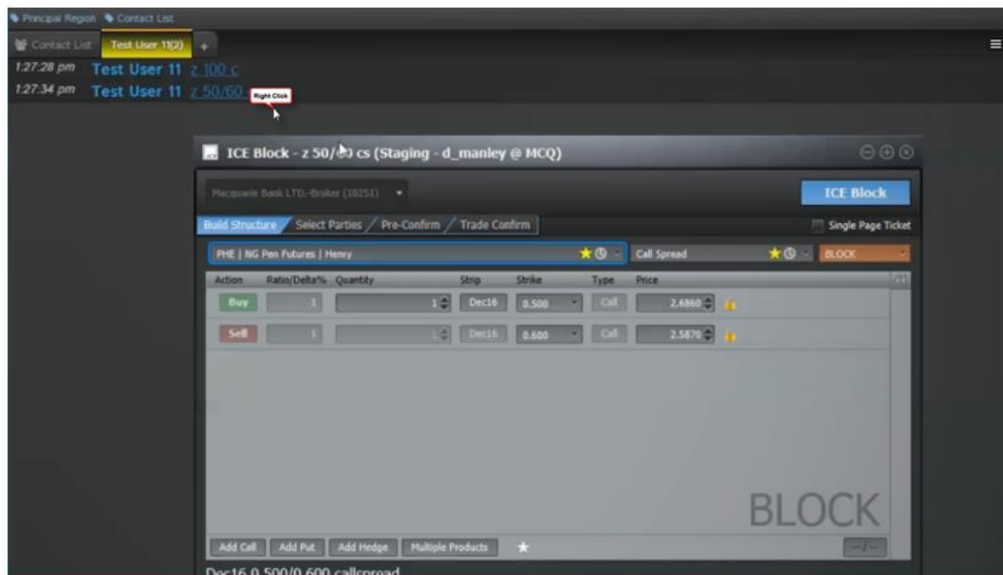
Select a previous market to price again to get an updated snapshot of the analytics.



## SUBMIT BLOCK

If you are permitted for block trading on ICE, when a recognized market is received you can have the ICE Block order ticket automatically populated with the order details by right-clicking on the recognized market and selecting **Submit Block**.

The ticket will open in WebICE or ICE Block for you to submit for straight-through-processing on the ICE trading platform.



## SUBMIT BLOCK PREFERENCES

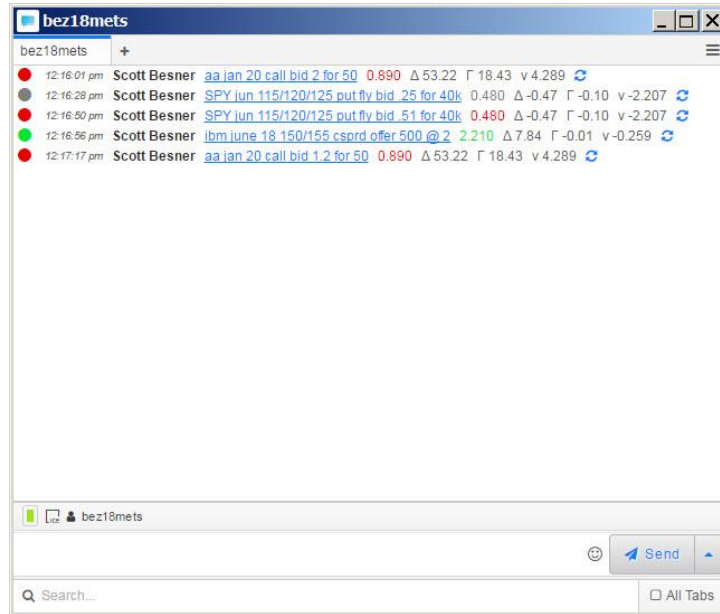
Once a block ticket is submitted, pre-confirms and confirms are automatically sent via IM on behalf of your desk. If you wish to modify these settings go to **Preferences → ICE Block**.

- **Auto Send Pre-confirm and Confirm Messages**

- **Send Confirm Messages on Behalf of Desk**

## EQUITIES RECOGNITION

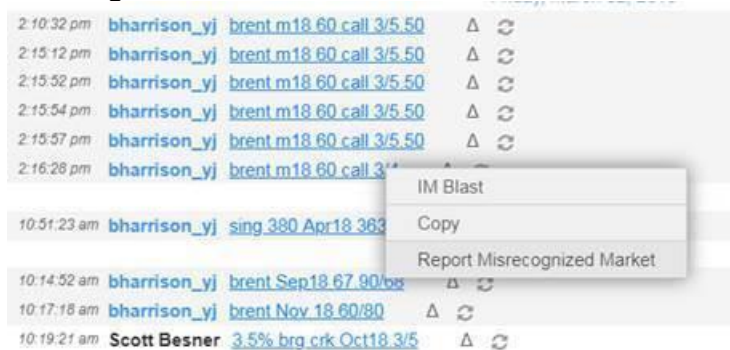
Inline Analytics also supports displaying the analytics data for recognized equities data via the ICE Chat API (AppLink).



## REPORT MISRECOGNIZED MARKETS

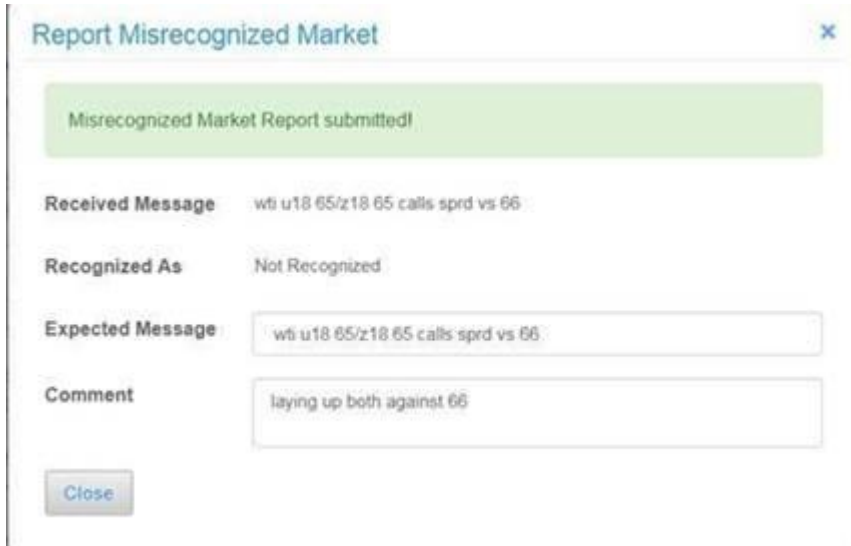
Users may now report a misrecognized IM quote to the ICE Market Recognition team directly from their message console.

To report a misrecognized market, right click on the market and select **Report Misrecognized Market** OR Right click next to a completely unrecognized market and select **Report Misrecognized Market**





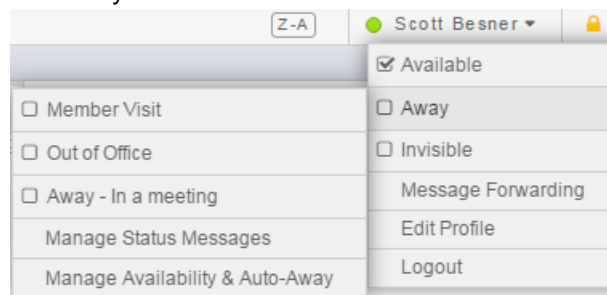
In the **Report Misrecognized Market** dialog box, enter the Expected market and any comments on how it should be properly parsed, then click submit. The recognition team will receive your report and follow up if they have any questions regarding the submission.



## USER STATUS

There are 3 user statuses available on the Chat platform. A user can set their status to:

- **Available:** your contacts see you online and active
- **Away:** your contacts see you online and inactive



- **Invisible:** your contacts do *NOT* see you online

You can change your status by clicking on the menu under your profile in the top right corner of your main console window. You can also associate a status message to be displayed to your contacts.

## MANAGE STATUS MESSAGES

Under the status sub-menu, is **Manage Status Messages**. Here you can create custom messages to associate with your status; Once created they will appear in the menu above.

## ALWAYS AVAILABLE

You can manage your settings to never appear “away” or “offline” to your contacts by clicking on your name in the top right corner of the main window. Simply hover over the Available or Away menu to open the sub-menu and select **Manage Availability & Auto-Away**. In the window will be a setting **While I’m away of offline**:

To always show available to your contacts select **Appear available to contacts and receive PNS based on priority**.

Manage Availability & Auto-Away ×

Set my status to away after  minutes

While I'm away or offline:

Appear away/offline to contacts and receive PNS based on priority

Appear available to contacts and receive PNS based on priority

## AUTO-AWAY TIMER

The platform will automatically set your status to away based on your specified settings. You can adjust this setting under the status sub-menu by selecting **Manage Availability & Auto-Away**.

**TIP:** If you wish to *NEVER* appear away, enter 0 minutes.

## MESSAGE FORWARDING

**Message Forwarding** allows you to forward your message to another contact on ICE Chat when you're online and away, or offline.

To set up message forwarding, open the **Message Forwarding Setup** window and select a contact to be the recipient of your forwarded messages.

- To turn on message forwarding while you're online but away, select **Enable online message forwarding**
- To turn on message forwarding while you're offline, select **Enable offline message forwarding**

- You can decide if you want to receive a mobile notification for each message which gets forwarded on your behalf by selecting the checkbox **Send mobile notifications when enabled**
- Each forwarded message can display which IM service the original sender was on if you so choose, just select **Show IM service in forwarded messages**

A user who forwards a message will see that message both in the chat window for the original sender and also copied into the chat window of the forwarding recipient.

A user who is the recipient of a forwarded message will receive the message on the tab of the forwarding user. In order to reply to the original sender of the message, the forwarding recipient and original sender must be connected. The actual sender will be [hyperlinked](#) in the forwarded message to allow the forwarding recipient to quickly reply or add the original sender as a contact if they are not connected.



## DIRECTORY SEARCH

The **Directory Search** provides access to a community of more than 120,000 ICE participants via a digital rolodex containing user profiles customized to meet the privacy requirements of each firm and/or user.

 A screenshot of the "Directory Search" interface. At the top, there is a search bar with the text "Directory Search" and a plus sign. Below the search bar, the title "Directory Search" is displayed, followed by the instruction: "Search for contacts in the ICE directory. You can search using names, nicknames, and companies." Below this is a search input field with the placeholder text "Name/Desk Name" and a blue "@ ICE" button. To the right of the input field is a "Search" button. At the bottom, there is a note: "When searching for someone, please enter at least two of the following: first name, last name, nickname and/or company."

You are able to search for individual contacts as well as desks. All searches on individual contacts outside your own firm must include at least two of the following: first name, last name, product focus, market type, region, role, nickname and/or company. If you're searching for a desk, these rules do not apply.

You can search the directory from both the directory widget and contact list.

## YOUR PROFILE

You can upload a profile picture, edit your nickname, and add the contact information you want to make available to your contacts. Simply click **Edit Profile** under your name in the top right corner of the main window.

Your profile also includes fields for your Role, Title, About Me, About my desk, Region, and your Product Focus. These fields can be set as private (only viewable by your contacts) or public (searchable via the directory). You can also import your product focus directly from your ICE Chat and WebICE activity.


When you edit your own nickname, this becomes the nickname all of your contacts will view (based on their preferences) unless they've added their own nickname for you.

Clicking on the **Chat Accounts** tab will display all of your linked accounts.

If you did not link your AOL or Yahoo account during registration, you can do it here by clicking on **Link Account**.

Even after you linked your Yahoo account, you have the ability to update the contacts by clicking on **Upload Contacts**.

**Edit Profile** ✕

 Nickname   
Company   
Desk Handle

[Contact Data](#) [Chat Accounts](#)

**Email Addresses**

Work

Work


**Phone Numbers**

Work

Work

To Change non-editable fields contact the help desk: [Chat Now!](#)

**Edit Profile** ✕

 Nickname   
Company   
Desk Handle

[Contact Data](#) [Chat Accounts](#)

**ICE Instant Message Account**

Handle:

**AOL Instant Messenger Account**

Handle:


**Yahoo Instant Messenger Account**

Handle:  [Upload Contacts](#)

To Change non-editable fields contact the help desk: [Chat Now!](#)

## YOUR CONTACTS' PROFILES

Edit Contact ✕

 **Michael Schwab**  
mschwab\_yj  
ICE

Emails	Work michael.schwab@theice.com Work <span>▼</span> <input type="text" value="Enter a new e-mail address"/>
Phone Numbers	Work nil Work <span>▼</span> <input type="text" value="Enter a new phone number"/>
Groups	Oil Traders, Everyone
Primary Group	Everyone <span>▼</span>
Priority	None <span>▼</span>
Default Product	Crude - WTI <span>✕</span> <span>▼</span>
Notes	<input type="text"/>

Service Handles

Service	Handle
ICE	mschwab_yj

You can view your contacts' information by right-clicking on them from a tab or from the **Contact List** and selecting **Edit Contact**.

Here you'll be able to view the basic contact information.

Click the Edit button to enable editing of their contact information. This includes editing their **Primary Group**, **Priority**, and **Default Product** for recognition.

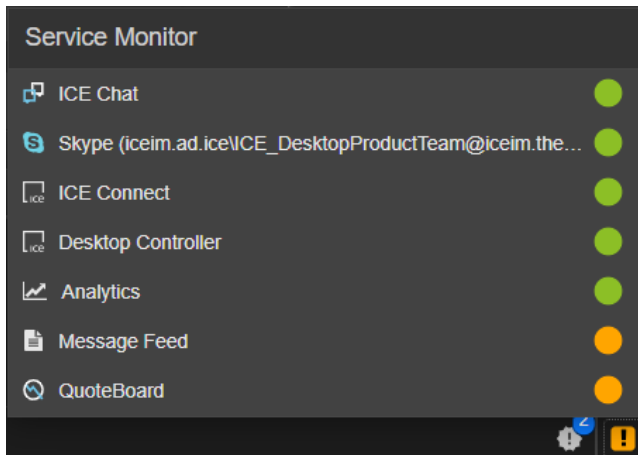
## NOTIFICATION CENTER AND SERVICE MONITOR

The Notification Center and Service Monitor are available to give you more insight into what is going on with your account. The Notification Center will provide ICE the ability to notify users of information related to their account while the Service Monitor gives you a view of your accounts connectivity and services.

Both can be found in the lower right corner of your main console. The icon will display in the color of the highest priority of any items under it when there is a reason to notify you.

Under Service Monitor you will be able to see the connectivity of the ICE Chat and your services.





Notifications will come into the Notification Center only when sent from ICE. ICE will decide whether the message could be cleared by the user or not. If so, there will be an “x” to clear it, if not the notification can only be cleared by ICE.

## GROUPS MANAGER

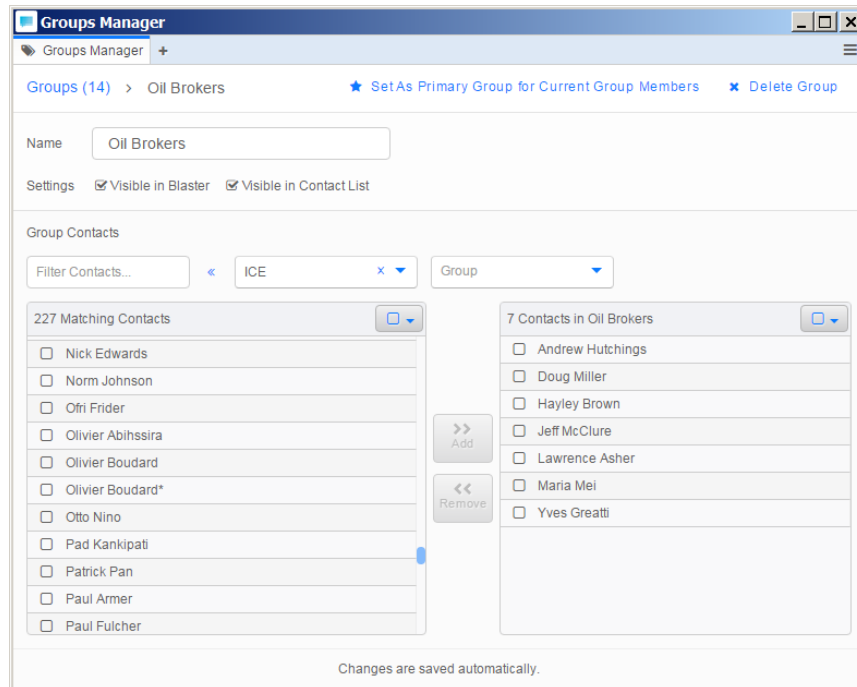
The **Groups Manager** provides an interface to make mass updates to your groups.

In the first view of groups manager you can view all of your groups with some basic information about them. The group order can be rearranged here via drag and drop.

Groups Manager +					
Groups (14) <span style="float: right;">+ Add New Group</span>					
Order	Name	Contacts	Blaster	Contact List	Edit
≡	<a href="#">Oil Traders</a>	47	✓	✓	<a href="#">✎</a>
≡	<a href="#">Oil Brokers</a>	8	✓	✓	<a href="#">✎</a>
≡	<a href="#">Clearing</a>	10	✓	✓	<a href="#">✎</a>
≡	<a href="#">Traders</a>	28	✓	✓	<a href="#">✎</a>
≡	<a href="#">Brokers</a>	51	✓	✓	<a href="#">✎</a>

Clicking on any group will open a more detailed group view where you are able to:

- Edit group name - simply type the new name in the **Name** field
- Edit membership of groups
- Delete Group
- Control a group's visibility - choose to have the group **Visible in Blaster** and/or **Visible in Contact List**



**QUICK TIP:** Utilize the various type-ahead filters to quickly find contact(s) to take action on:

- Contact
- Company
- Group

## GROUPS SORTING

On the main page of the Groups Manager, to the right of the Add New Group link is a toggle to quickly sort your groups A-Z, Z-A, or manually.

### SUBMIT FEEDBACK

If you would like to submit feedback go to **Help** → **Submit Feedback**; we are always looking to improve our platform, and would welcome your comments and feedback.

