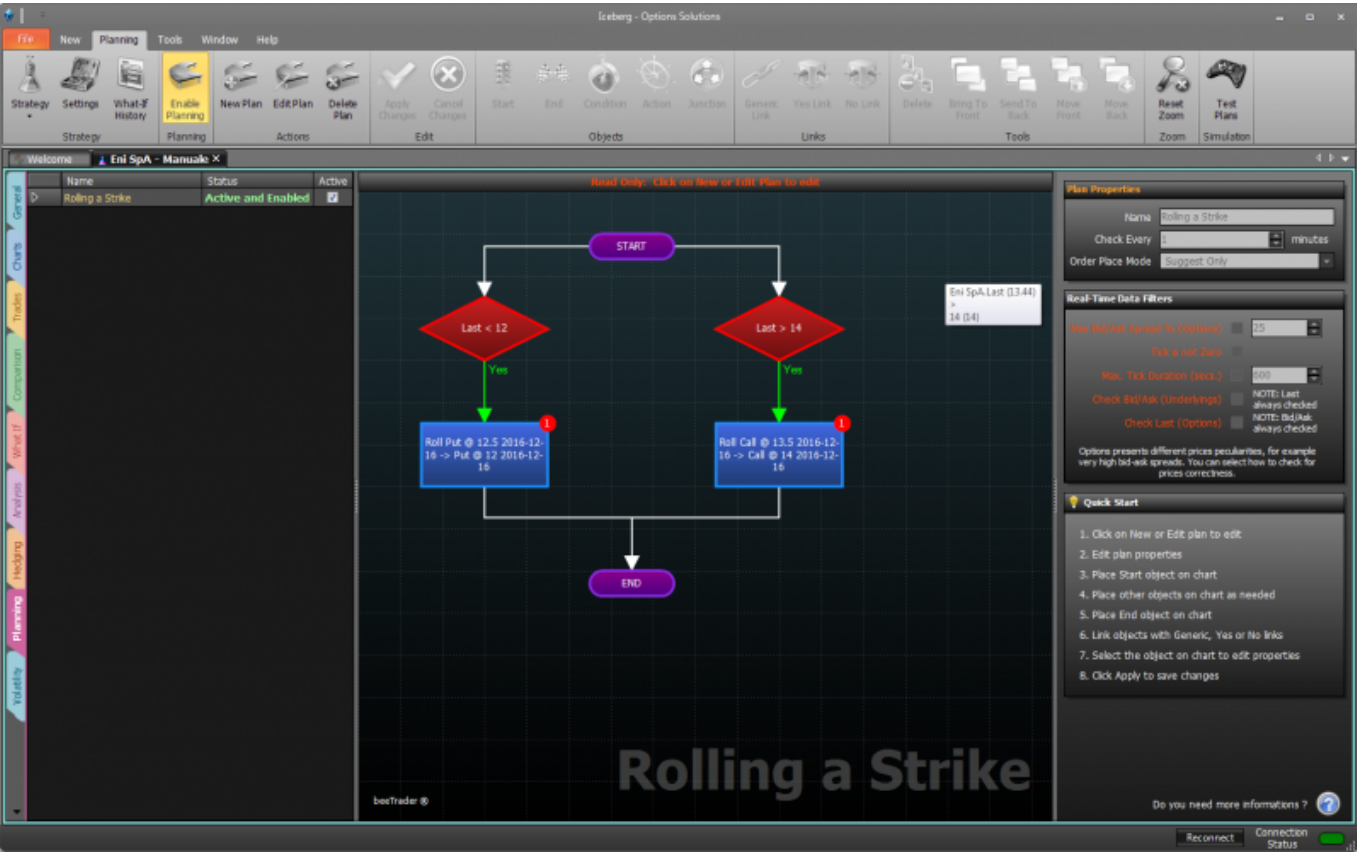# Strategy - Planning

Iceberg in this section provides the user a simple but powerful system to automate the trading in options. It also allows to non-programmers to create set certain moves which will be executed automatically. For users with more knowledge a scripting system will be available.
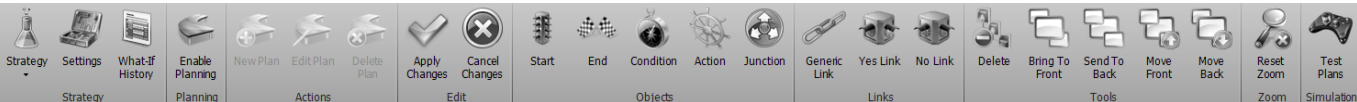

Video Tutorial
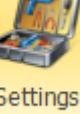
📹	24/03/2016	Planning - L'area di lavoro	6:22 🇮🇹
📹	24/03/2016	Planning - Il grafico del futuro!	9:35 🇮🇹
📹	24/03/2016	Planning - Esempio di Utilizzo	6:53 🇮🇹

Click here to watch other Video di Iceberg

Il menu

Strategy

Strategy		It open the submenu Strategy
New Strategy		It creates a new Strategy
Open Strategy		It allows to open a previously saved Strategy
Save Strategy		It allows to save the Strategy currently in use
Settings		It opens the window Strategy Settings for the strategy settings
What-If History		it open the window What-If History where there are stored all the transactions carried out by the function What-If

Planning

Enable Planning	It enable or disable the Planning function, whether the button is highlighted the function is active.

Actions

New Plan	It create a new Plan for the Strategy
Edit Plan	It allows you to edit the selected Plan
Delete Plan	It delete the selected Plan

Edit

Apply Changes	It confirm the changes made to a Plan
Cancel Changes	It cancel the changes made to a Plan

Objects

Start	It allows you to enter the starting point of the Plan
End	It allows you to enter the end point of the Plan
Condition	It allows you to insert a condition in the Plan
Action	It allows you to enter an action in the Plan
Junction	It allows you to place an hub for the links of the Plan

Links

Generic Link	It allows you to insert a link between the starting point of the Plan and the condition, between the action and the end point and between actions. It connect the components of a Plan which are not subject to a decision (Yes or No)
Yes Link	It allows you to insert a link between conditions and actions, in case the condition is verified
No Link	It allows you to insert a link between conditions and actions, in case the condition is not verified

Tools

Delete	It delete the selected object of the Plan
Bring To Front	It allows you to move the selected item to the first level, therefore in foreground
Send To Back	It allows you to move the selected item to the last level
Move Front	It allows you to advance the selected object of a level
Move Back	It allows you to move down the selected object of a level

Zoom

Reset Zoom	It reset the zoom

Simulation

Test Plans	It start the Plan Test

Plan Object

A Plan consists of various objects that indicate the logical sequence and then how the sequence will be evaluated and executed. We see below what items make up a Plan and their properties.

Start

By clicking the button **Start** you can enter the Start object .

When Start object is selected, as well as the End object, it appears a sidebar with the general settings of the Plan.

- Name: name of the Plan;
- Check Every: You set how many minutes must elapse between a check of the plan and another ;
- Order Place Mode: Here you choose how Iceberg must manage the delta hedging orders.
  Suggest Only: In case of a generation of an order Iceberg only show it on the "General" tab and

it must be finalized in Real Market or Paper Trading. Paper Trading (Automatic): in case of a generation of an order it is automatically put in Paper Trading. Real Market (Manual): In case of a generation of an order the corresponding book to trade it in real market will appear. Real Market (Automatic): In this case an order is automatically sent to the broker with the price type previously set;

- Max Bid/Ask Spread % (Options)
- Tick is not Zero
- Max Tick Interval (secs)
- Check Bid/Ask (Underlying)
- Check Last (Options)

You can only enter a Start object into the Plan, which must be concluded with an End object but you can enable more Plans at once.

End

By clicking the button you can enter the End object , which must be entered to complete a Plan.

When Start object is selected, as well as the End object, it appears a sidebar with the general settings of the Plan where you have to set its name and how many minutes must elapse between a check of the plan and another.
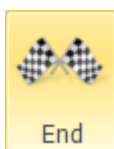
Plan Properties

Name Rolling a Strike

Check Every 1 minutes

Order Place Mode Suggest Only

Real-Time Data Filters

Max Bid/Ask Spread % (Options) 25

Tick is not Zero

Max. Tick Duration (secs.) 600

Check Bid/Ask (Underlyings) NOTE: Last always checked

Check Last (Options) NOTE: Bid/Ask always checked

Options presents different prices peculiarities, for example very high bid-ask spreads. You can select how to check for prices correctness.

💡 **Quick Start**

1. Click on New or Edit plan to edit

2. Edit plan properties

3. Place Start object on chart

4. Place other objects on chart as needed

5. Place End object on chart

6. Link objects with Generic, Yes or No links

7. Select the object on chart to edit properties

8. Click Apply to save changes

Do you need more informations ?

Condition

By clicking the button Condition it is possible to insert the object , which

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contains the condition that will have to be verified. From a Condition object can exit a "Yes" link, which will be connected to the action to take if the condition is verified, or a "No" link, which will be connected to the action to take if the condition is not verified.

When "Condition" object is selected, a sidebar with the settings will appear. You have to complete the field.

Operand 1: you have to assign the first term of the comparison, It can be a property of an Asset, a property of a Strategy, a property of a Plan or a Custom value setted by the user;

Operator: You have to choose the mathematical operator;

Operand 2: you have to assign the second term of the comparison, It can be a property of an Asset, a property of a Strategy, a property of a Plan or a Custom value setted by the user;

Object Text: in this field you can assign a short note that will be displayed in the Plan within the object Condition;

Preview: it shows shows the preview of the selected condition.

Type	Which	Property
AssetsProperties	Legs of the Strategy	Proprietà della Legs della Strategy selezionata
StrategyProperties	-	Proprietà della Strategy
CustomValue	-	Valore impostato dall'Utente
PlansProperties	Scelta del Plan	Proprietà del Plan selezionato

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