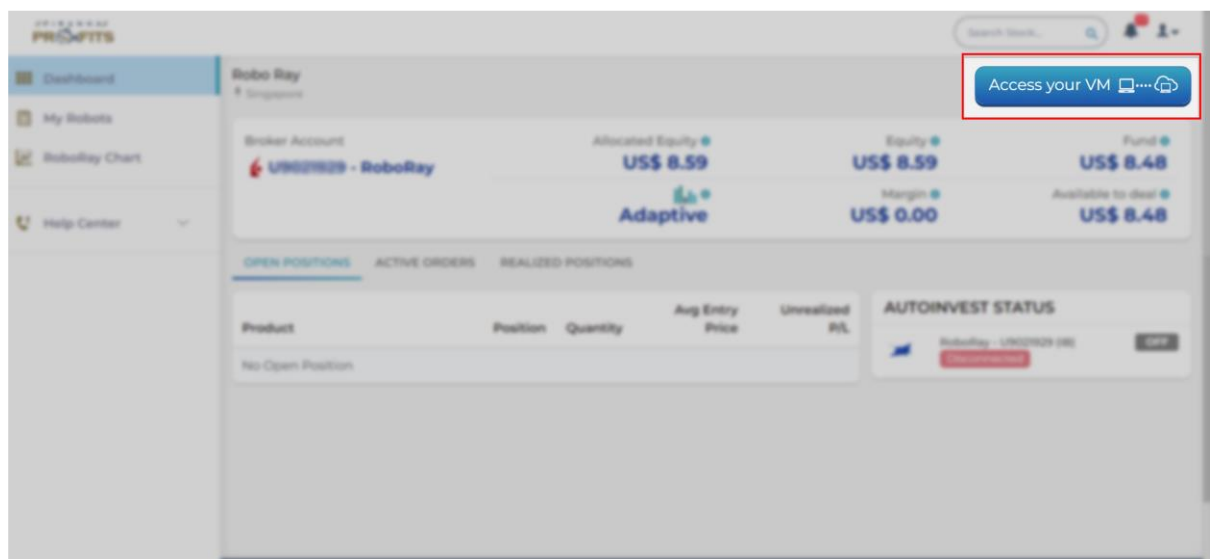
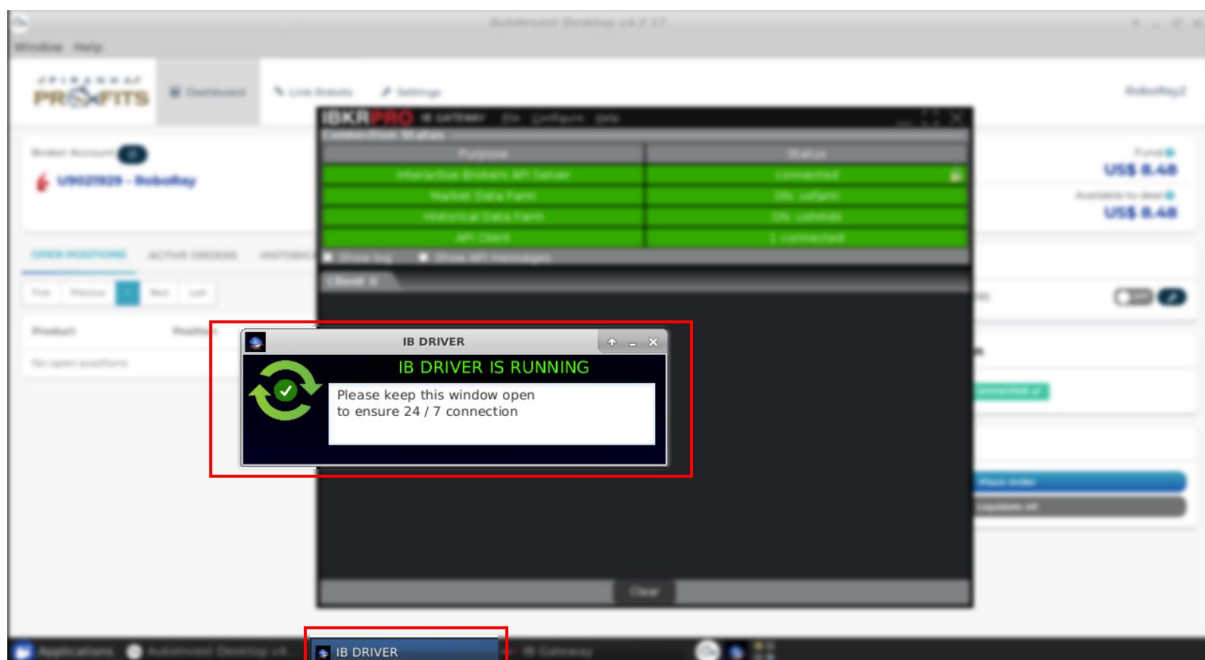


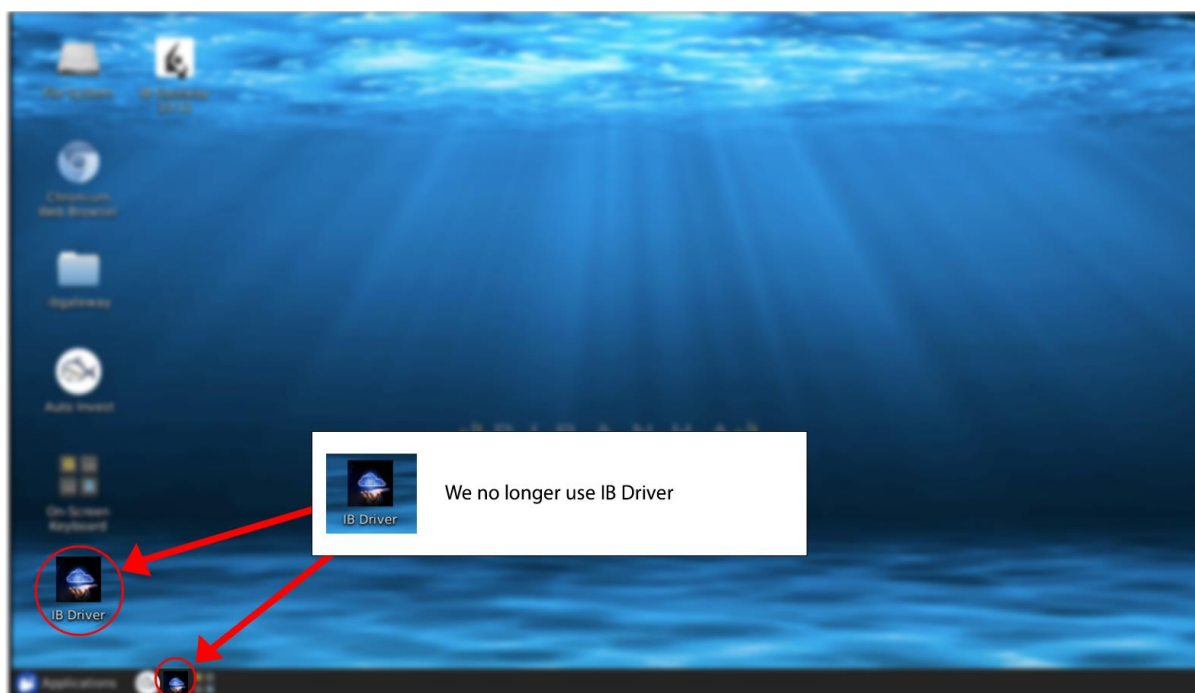
1. To set up, go to Dashboard and click **Access your VM** button at the top right.



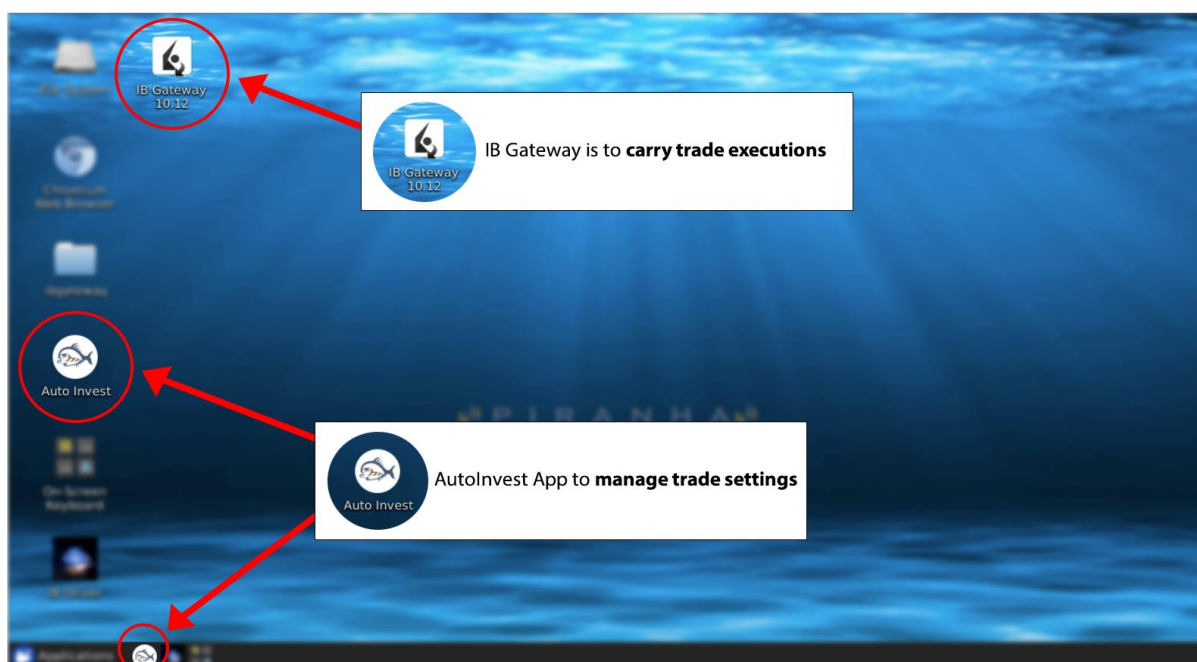
2. Check if you are still using the IB driver to connect AutoInvest and IB gateway. The image below shows the connection using the IB driver.



3. You can close the IB driver app now. And remember not to use the IB driver app moving forward, by simply not clicking the IB driver app as shown below.

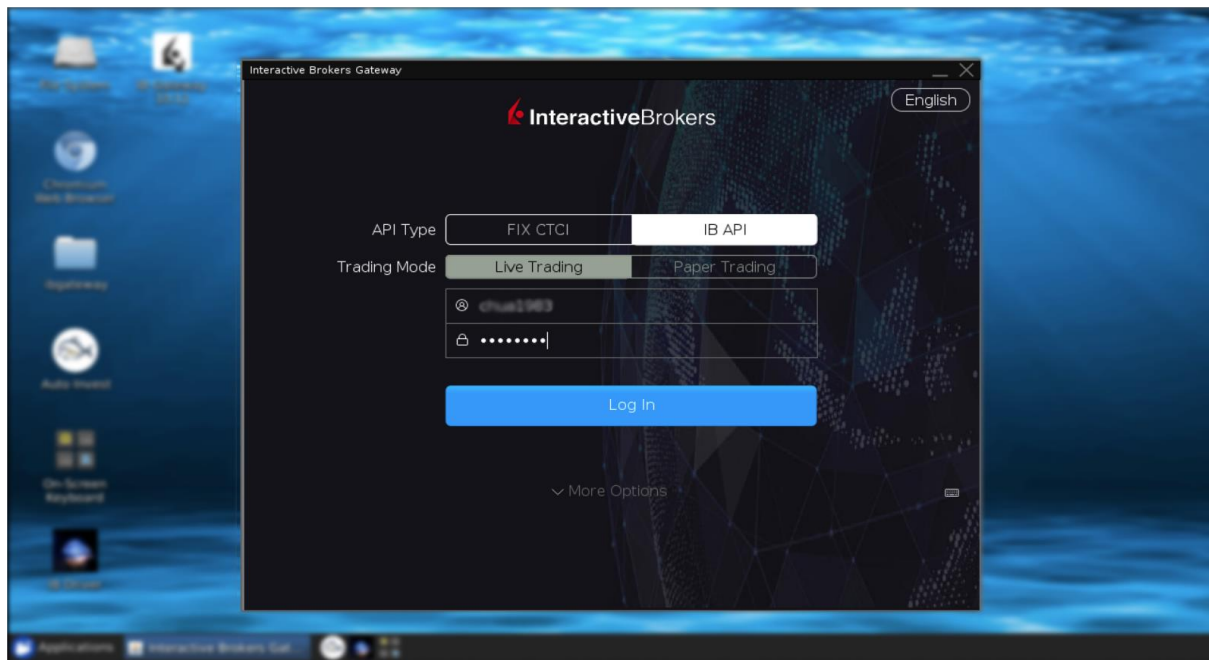


4. The new connection is only using AutoInvest and IB Gateway app. At the time of writing the latest IB gateway version is 10.12.

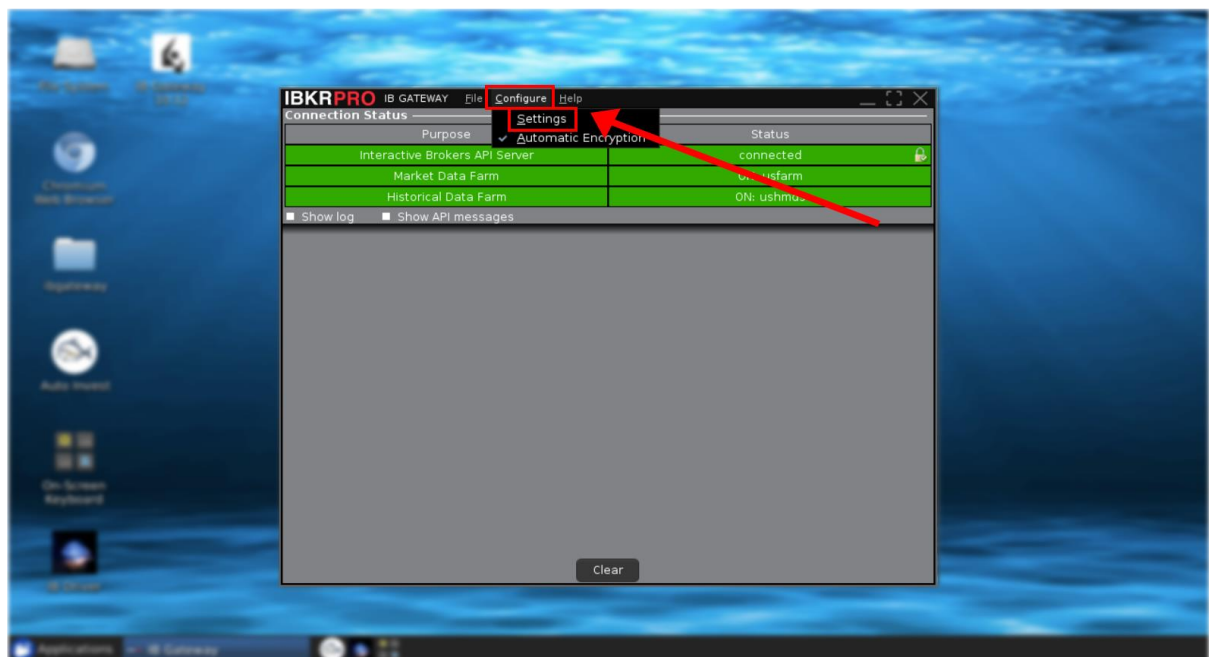


FIRST SETUP FOR IB GATEWAY (the steps below need to be configured once only during the first setup)

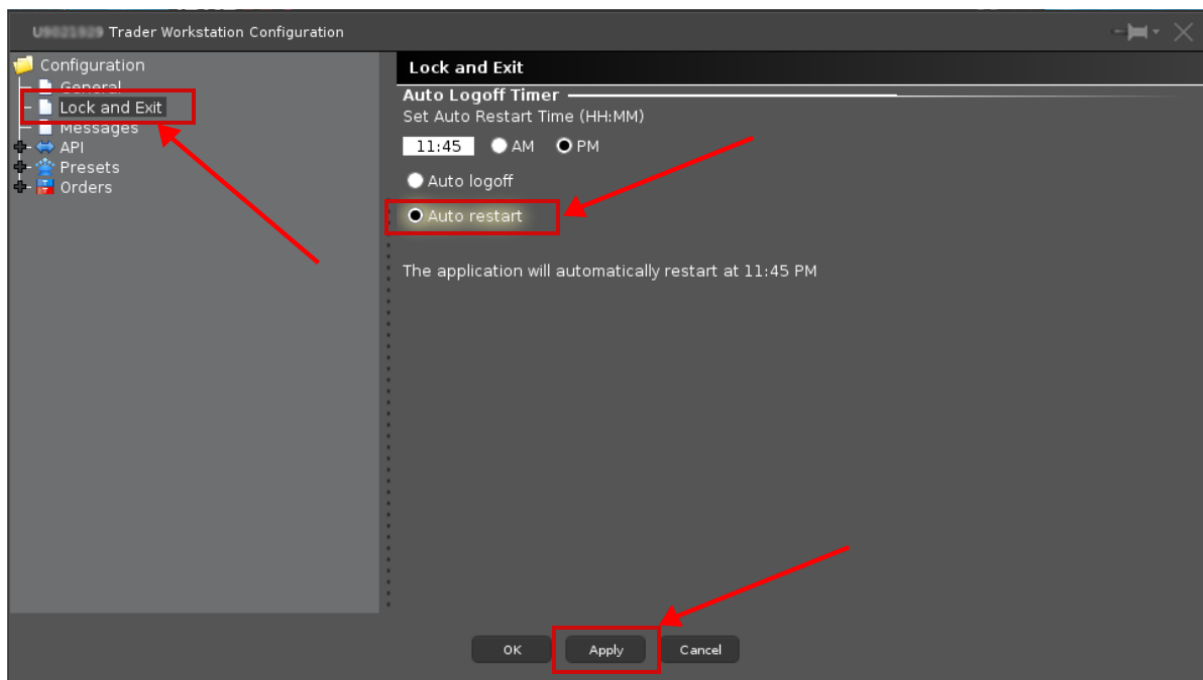
5. Open the IB Gateway, fill in the username and password, and click **login**



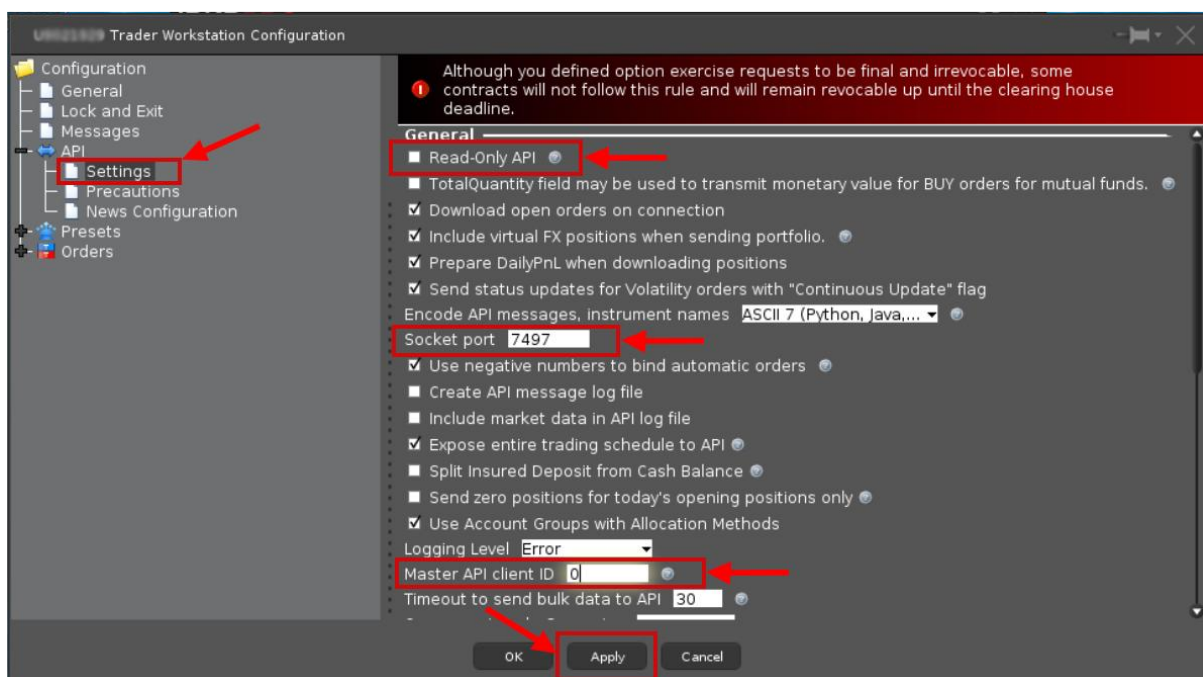
6. Click **Configure** -> **Settings**



7. Select **Lock and Exit** -> click the **Auto restart** button. Please ensure to click **Apply** button afterward.

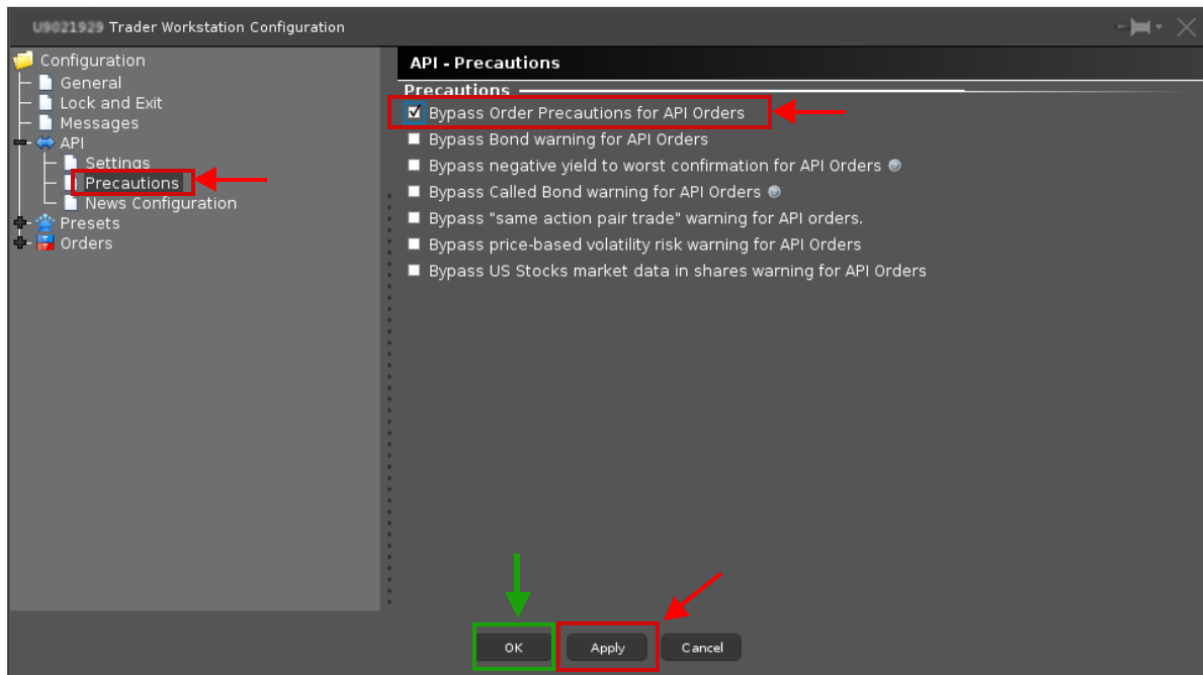


8. Select **API -> Settings**. Configure the following:
 - Untick / Uncheck the **Read-Only API** option
 - Type '7497' in **Socket port** label
 - Type '0' under the **Master API client ID** label
 - Ensure click **Apply** button so the new configuration takes effect

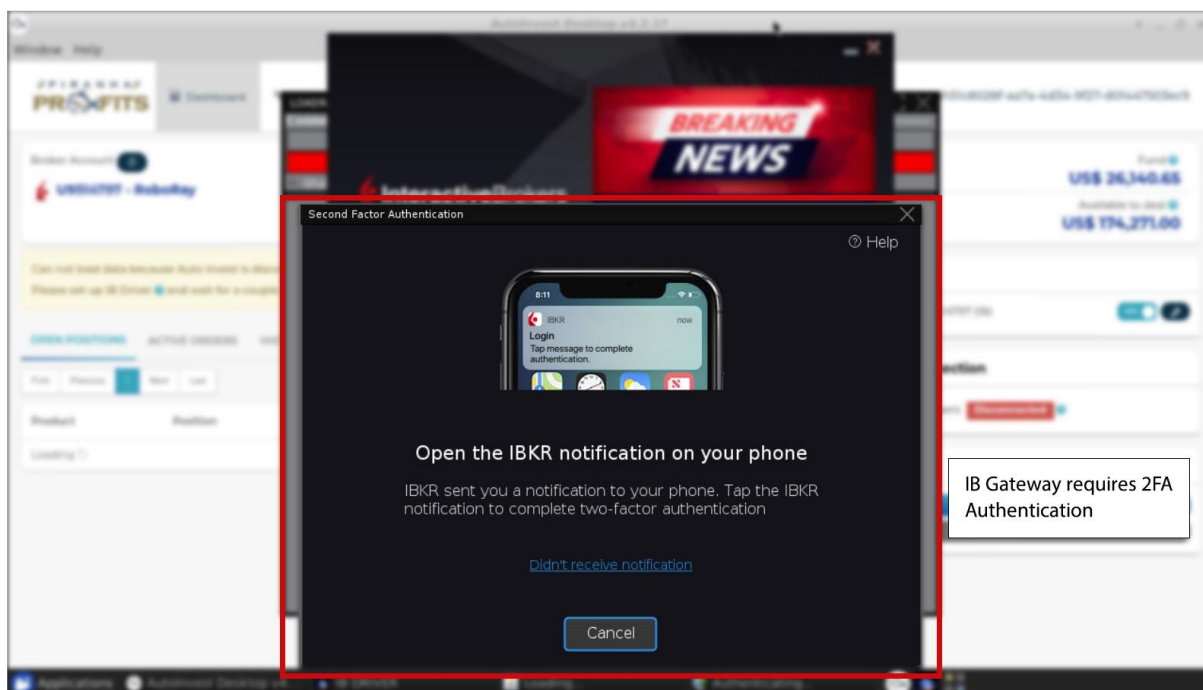


9. Select Precautions. Configure the following:

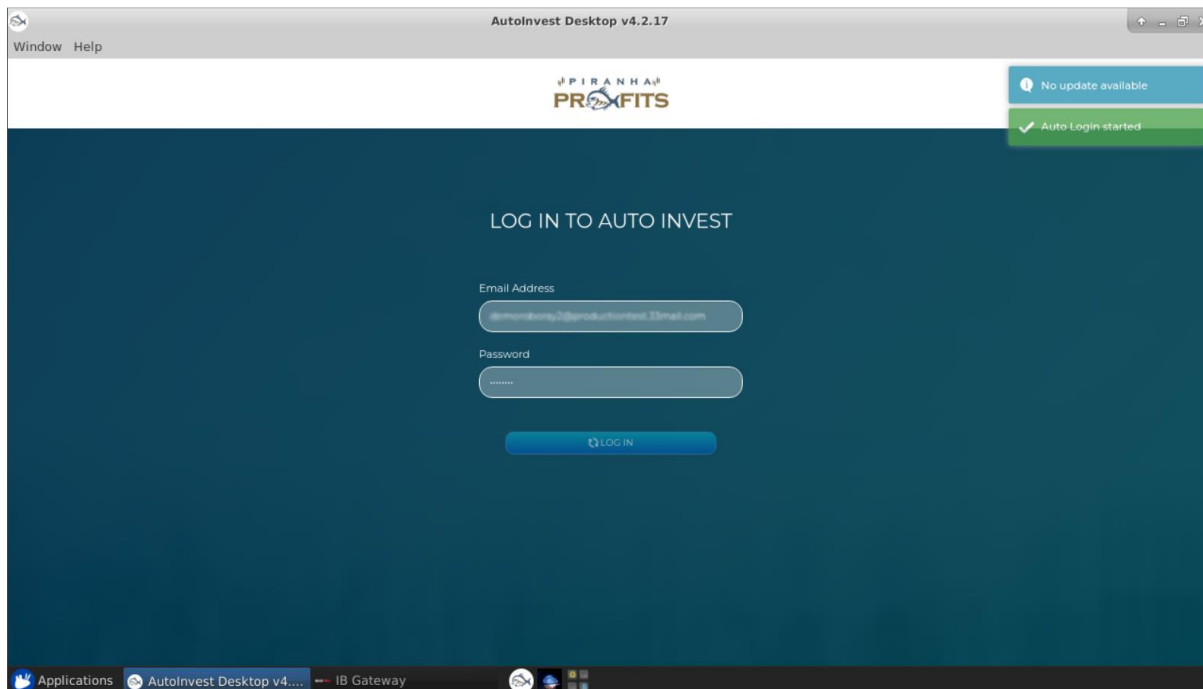
- Tick / Check **Bypass Order Precaution for API Orders** option
- Ensure click **Apply** button for a new configuration to take place, then click **OK**



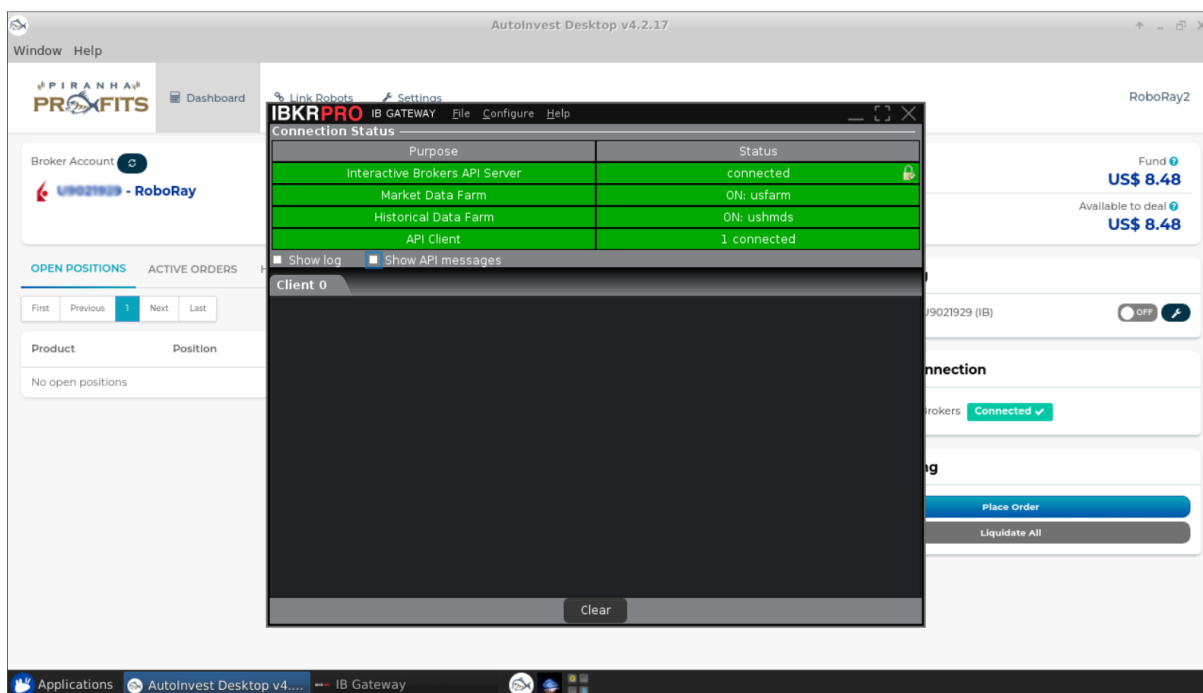
10. The setup for the IB Gateway is now complete. It is not required to re-configure again the settings once the setup is done. You can skip steps 5 to 9 every time you log in to the IB gateway. You only need to input the username and password to log in IB gateway, followed by 2FA authentication as shown below (**IB starts implementing 2FA authentication to all accounts by 30th Nov 2022**). That is all.



11. Next, you need to run the AutoInvest app, then key in the username and password as shown in the image below.



12. AutoInvest app will automatically search and connect IB Gateway.



13. Please ensure your IB gateway app is active and connected to the AutoInvest app. Based on past observations, Interactive Broker did server maintenance during the weekend. So, we usually need to re-login to the IB gateway once a week on Monday or the first day of the week, just before the stock market opens. There are no rules on when it is best to log in to

the IB gateway; we can do it whenever available. Note that it is also a good practice to check the connection whenever available to ensure the IB gateway is running.