

# Ezorro Platform User Guide

Welcome to Ezorro!

Ezorro is a powerful platform designed to simplify trading and portfolio management. By leveraging its AI-powered strategies, data-rich insights, and integration capabilities, you can enhance your trading experience and make data-driven decisions.

For further assistance, please contact support at [support@ezorro.app](mailto:support@ezorro.app).

This guide will help you understand the platform's features and how to make the most of each page.

---

## 1. Assistant Page

URL: [Assistant Page](#)

### Overview:

The Assistant page allows users to create **trading strategies** with the help of AI. Here, users can interact with the AI assistant to generate, refine, and customize their trading strategies.

### Features:

- **Strategy Creation:** Use the AI assistant to define goals, risk levels, and preferences.
  - **Customizations:** Modify strategies based on market insights provided by the AI.
  - **Output:** Save strategies for future use or implement them directly.
- 

## 2. Stock Page

URL: [Stock Page](#)

### Overview:

The Stock page provides detailed information and analytics on individual stocks.

## Features:

- View **current stock data**.
  - Analyze **performance trends**.
  - Access **market insights** for specific stocks.
- 

## 3. Crypto Page

URL: [Crypto Page](#)

### Overview:

The Crypto page is dedicated to cryptocurrency data and analytics.

### Features:

- View the **latest cryptocurrency prices** and trends.
  - Analyze **market performance** for selected cryptocurrencies.
  - Monitor **volatility** and other key metrics.
- 

## 4. News Page

URL: [News Page](#)

### Overview:

The News page provides users with news related to the financial markets, tailored to their portfolio.

### Features:

- **General News:** Stay updated on global financial trends and events.
  - **Portfolio-Linked News:** Get news related to stocks or assets owned on external platforms.
  - **Account Linking:** Link external accounts to personalize the news feed:
    1. Click the **Settings** icon at the top of the page.
    2. Select **Link Account**.
    3. Connect to your account through [SnapTrade](#).
-

## 5. Portfolio Page

URL: [Portfolio Page](#)

### Overview:

The Portfolio page displays an overview of the user's financial data based on linked accounts.

### Features:

- **Account Integration:** Aggregate data from all linked platforms.
  - **Performance Analytics:** View portfolio performance metrics, trends, and allocations.
  - **Asset Breakdown:** Analyze stock, crypto, or other investments in detail.
- 

## 6. Strategies Page

URL: [Strategies Page](#)

### Overview:

The Strategies page displays AI-generated trading strategies created through the Assistant. Users can view, manage, and execute these strategies.

### Features:

1. **View Strategies:** Browse a list of all generated strategies.
  2. **Actions:**
    - **Download:** Save strategies for offline reference.
    - **Run/Unrun:** Execute or halt strategies based on preference.
    - **Delete:** Remove unwanted strategies.
  3. **Execution Options:**
    - Define **Start Date and Time**.
    - Define **End Date and Time**.
    - Specify **Frequency**.
  4. **Strategy Evaluation:**
    - Once executed, the system evaluates strategy performance.
    - View detailed **evaluation reports** generated by the system.
- 

## 7. Account Linking

URL: [SnapTrade Account Linking](#)

## Overview:

To enhance your Ezorro experience, you can link external accounts through SnapTrade. Linking enables personalized features such as portfolio tracking and tailored news.

## Steps:

1. Navigate to the **Settings** icon on the top of the page.
2. Click **Link Account**.
3. Follow the prompts on SnapTrade to connect your account securely.