

The Five Steps Starter Guide

STEP 01

Set up an account

After you've changed your password, first create your trading account in the "Accounts" tab. Then, in the same tab, record your initial deposit as a transaction—making sure it's dated before your first trade so that performance is calculated correctly.

STEP 02

Store strategies

Document all important details about your trading strategies in your "Strategy Playbook": from entry conditions and exit criteria to risk management. The more granular your rules, the more precisely you can later evaluate and refine both your rule set and your discipline.

STEP 03

Record trades

Record every trade as thoroughly as possible: screenshots from your entry and exit times will help you review the trade later. Choose the appropriate strategy from your playbook. Be sure to note your emotional state at the time of entry—this way, you can later determine if your emotions affected your trades.

STEP 04

Use notes

Use the note feature to record important information, news events, or changes in your trading—whether within individual trades, in the calendar, or in the Notes tab. The better your documentation, the more valuable your insights will be.

STEP 05

Analyze metrics

Review your results in the trading journal once a week or after every 20–30 trades. Use the filter functions to analyze specific strategies, markets, or your discipline. Profits and losses are subject to normal statistical fluctuations, so avoid daily reviews—this helps you steer clear of unnecessary stress-based decisions.