TWS Electron App - Quick Start Guide (Simplified Version)

What's New in the Simplified Version

Removed Elements

- ❌ Connection Settings UI (now in .env file)
- ❌ Positions Table
- ❌ Refresh Positions Button
- ❌ Sell Market Order Button
- ❌ Individual Close Position Buttons

New Features

✨ **Auto-Connect** - App connects automatically on startup

✨ **Symbol Dropdown** - Pre-populated with popular trading symbols

✨ **Lot Size Dropdown** - Quick selection of common lot sizes

✨ **Radio Buttons** - Easy Call/Put selection

✨ **Confirmation Dialog** - Safety check before executing orders

✨ **Close All Button** - Quickly close all positions with one click

Setup Instructions

1. **Configure Connection Settings**

    ```bash
    # Edit the .env file in the project root
    nano .env
    ```

Set your TWS connection details:

```
TWS_HOST=127.0.0.1
TWS_PORT=7496
TWS_CLIENT_ID=1
```

1. **Start the Application**

    ```bash
    npm start
    ```

The app will automatically connect to TWS on startup.

Using the Simplified Interface

Placing a Buy Order

1. **Select Symbol** - Choose from dropdown (SPY, QQQ, AAPL, etc.)
2. **Select Lot Size** - Choose from dropdown (1, 2, 5, 10, 20, 50, 100)
3. **Select Expiry Date** - Pick from date picker (defaults to today)
4. **Enter Strike Price** - Type the strike price
5. **Select Type** - Click radio button for Call or Put

6. **Click "Buy Market Order"**

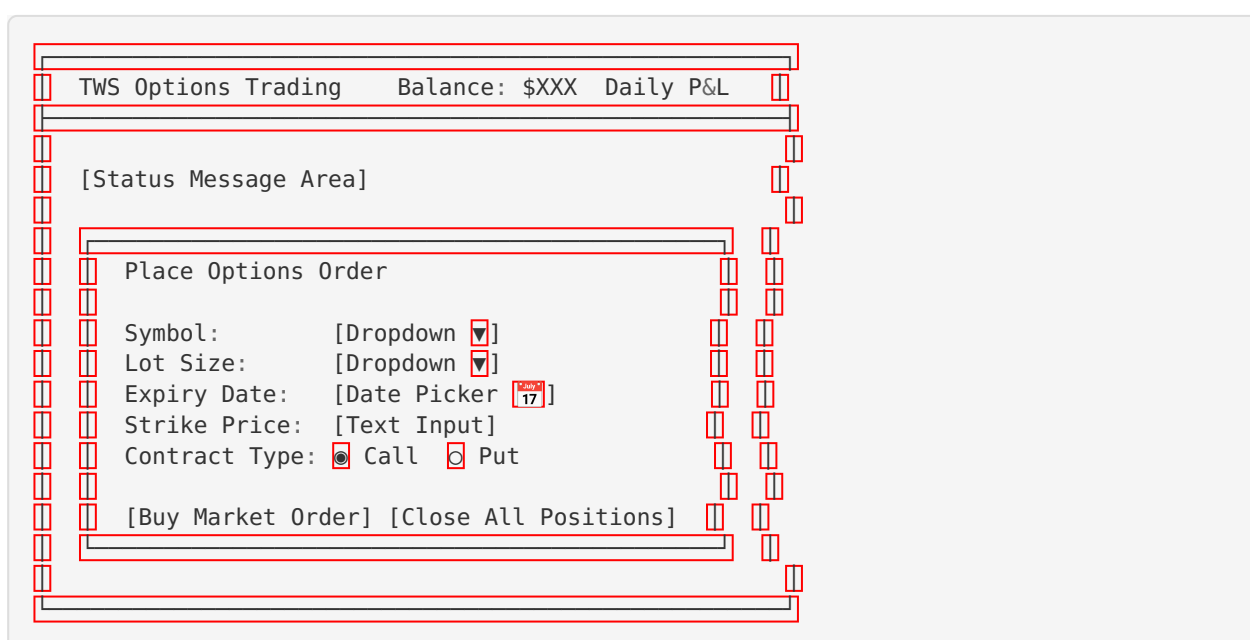7. **Confirm** - Review order details in dialog and click Confirm

Closing All Positions

1. Click **"Close All Positions"** button

2. Review warning in confirmation dialog

3. Click **Confirm** to execute or **Cancel** to abort

Monitoring Portfolio

- **Balance** - Displayed in top-right corner of header
- **Daily P&L** - Displayed below balance (green for profit, red for loss)
- Both values refresh automatically every 5 seconds

Interface Layout

```
 ┌──────────────────────────────────────────┐
 │  TWS Options Trading    Balance: $XXX  Daily P&L  │
 ├──────────────────────────────────────────┤
 │                                            │
 │  [Status Message Area]                     │
 │                                            │
 │  ┌──────────────────────────────────────┐ │
 │  │  Place Options Order                 │ │
 │  │                                      │ │
 │  │  Symbol:       [Dropdown ▼]          │ │
 │  │  Lot Size:     [Dropdown ▼]          │ │
 │  │  Expiry Date:  [Date Picker 📅]      │ │
 │  │  Strike Price: [Text Input]          │ │
 │  │  Contract Type: ◉ Call   ○ Put       │ │
 │  │                                      │ │
 │  │  [Buy Market Order] [Close All Positions] │ │
 │  └──────────────────────────────────────┘ │
 │                                            │
 └──────────────────────────────────────────┘
```

Keyboard Shortcuts

- **Esc** - Close confirmation dialog (if open)
- All other shortcuts removed for simplicity

Troubleshooting

App won't connect

- Check `.env` file exists and has correct values
- Ensure TWS/IB Gateway is running
- Verify port number matches TWS settings
- Check TWS API settings allow connections

Dropdown not working

- Ensure you're not clicking while app is loading
- Check browser console for JavaScript errors

Order not executing

- Verify all fields are filled correctly
- Check TWS is properly connected
- Review TWS error messages

Configuration Files

- `.env` - Connection settings (edit this)
- `.env.example` - Template with sample values
- `main.js` - Reads .env file
- `tws_bridge.py` - Python backend

Benefits of Simplified Interface

✅ **Faster workflow** - Less clicking, fewer fields
✅ **Less errors** - Dropdowns prevent typos
✅ **Safer trading** - Confirmation dialogs
✅ **Cleaner UI** - Removed unused sections
✅ **Auto-connect** - No manual connection needed
✅ **Better UX** - Logical flow, clear actions

Support

For issues or questions, refer to:
- `SIMPLIFICATION_SUMMARY.md` - Complete list of changes
- `README.md` - Original documentation
- `TESTING_GUIDE.md` - Testing procedures

Version: Simplified v1.0
Last Updated: November 2025