

# AI Onboarding Flow

## Overview:

This flow powers a fully personalized user experience through 5 dynamic steps, tuned by subscription tier:

### 1. ExperienceStep

- 2. UI Component: ExperienceStep.jsx
- 3. Function: Assess user experience level (Beginner, Intermediate, Advanced, Expert)
- 4. AI Tie-In: Determines knowledge base delivery depth

### 5. RiskToleranceStep

- 6. UI Component: RiskToleranceStep.jsx
- 7. Function: Slider-based or quiz-style profiling for risk
- 8. AI Tie-In: Influences trade types (options, futures, ETFs, etc.)

### 9. TradingStyleStep


- 10. UI Component: TradingStyleStep.jsx
- 11. Function: Select style (Scalping, Swing, Long-Term)
- 12. AI Tie-In: Selects temporal patterns and indicators

### 13. PlatformPreferencesStep

- 14. UI Component: PlatformPreferencesStep.jsx
- 15. Function: Choose preferred trading tools (TradingView, MetaTrader, ThinkOrSwim)
- 16. Integration: Activates relevant Middleware API modules

### 17. StrategySelectionStep + CustomizationStep + ReviewCompletionStep

- 18. Function:
  - AI recommends strategy bundles
  - User fine-tunes preferences (risk limits, drawdown tolerance, stop-loss behavior)
  - Final confirmation screen
- 19. UI Components: StrategySelectionStep.jsx, CustomizationStep.jsx, ReviewCompletionStep.jsx

 **Known Issue:** Performance delay after `TradingStyleStep`. Currently being addressed in the next code patch.

---

## Manus Sprint Task Cards

### Sprint 1 – Phase 5A: RL Agent + Backtesting (LOCKED IN)

Task	Owner	Status
RL Model Agent (DDPG variant)	AI Team	✅ Complete
Backtesting Framework Integration	AI Team	✅ Complete
TradingView Signal Validation	Richard	✅ Complete
MetaTrader + Gateway Sync	Manus	✅ Complete
Blockchain Route Test	Manus	✅ Complete ✅ 100% Success

### Sprint 2 – Onboarding + Demo Finalization

Task	Owner	Status
Complete Final 5 Onboarding Steps	Richard	🟡 In Progress
Wallet UI with Quantum Indicators	AI + UI Team	➡️ Next
Profit Allocation Engine	AI Team	➡️ Next
CI/CD Live Demo Deployment	DevOps	➡️ Pending

## Investor Materials Summary

- **Current Deck:** [Investor Deck V3 - July 2025](#)
- **Demo Assets:** Blockchain Gateway + Trading AI walkthrough
- **Investor Narrative:** From onboarding to quantum-secured execution

## Blockchain Gateway Security


- Quantum Encryption Stack (Post-Quantum Cryptography + NIDR Agent)
- Real-time AI Risk Interceptor Layer (adaptive to threat profiles)
- Photonic CPU Ready: Signal routing + entropy protection layer
- Fully documented in HLDD – Quantum Security Section

## Business Plan – Summary Draft

- 3-Tier Monetization (Basic, Pro, Enterprise)
- Projected ARR: \$1.8M → \$45M within 18 months

- Global B2C + Institutional licensing strategy
  - Launch Regions: US, EU, Asia (compliant onboarding stacks)
  - IP & Patent Path: 7 patentable innovations identified
- 

## API Documentation – Connector Targets

- TradingView: Webhook-compatible (confirmed)
  - MetaTrader: Connector in final sync (Sprint 1  Complete)
  - ThinkOrSwim: Planned for Enterprise phase
  - Alpaca / IBKR: Middleware-ready endpoints
- 

## Component Library







- AI Onboarding Wizard
  - Wallet Security Dashboard
  - Quantum Indicator Overlay
  - Strategy Builder + Backtester
  - Subscription Management + Billing View
- 

## Demo Walkthrough (Updated with Blockchain Route Test)

**Demo Title:** TradingView → MetaTrader → Quantum Gateway

**Flow Summary:** 1. Signal generation via TradingView webhook (RSI/MACD demo strategy) 2. Signal routed through MetaTrader connector (live confirmation) 3. Blockchain Gateway intercepts and logs the trade event 4. Quantum security layer validates and encrypts execution 5. UI visual feedback: Trade confirmed with risk profile displayed

**Test Results Summary:** - Total Scenarios: 4 (EURUSD, GBPUSD, BTCUSD, ETHUSD) - Success Rate: 100.0% - Quantum Signatures Generated: 4 - Blockchain Confirmations: All verified - Avg Execution: 2.1s | Confirmation: 12.3s | Signature Gen: 0.5s - Network Fees: 0.0042 ETH per tx

**Assets:** -  Detailed logs: blockchain\_route\_detailed.log -  Test results: blockchain\_route\_test\_results.json -  Annotated output: route\_test\_annotated.txt -  Flowchart diagram: (In Progress) -  Screenshot walkthroughs: (To be uploaded) -  Embedded explainer video: (Pending render)





---

## GitHub & Asset Links

- Core Backend: `github.com/genaix/backend`
- React Frontend: `github.com/genaix/frontend`

- Visual Assets & Diagrams: `github.com/genaix/assets`
  - HLDD: To be added after final merge
- 

## **Post Phase 2 – Immediate Next Steps**

1.  **Phase 3 – Demo Asset Collection**
2. Design trading signal flowchart (Figma or draw.io)
3. Capture live screenshots from the test harness
4. Record video walkthrough for investor slide deck
5.  **Wallet Interface UI (Phase 4A)**
6. React component design for cold storage & quantum indicators
7. Begin integration with blockchain metadata
8.  **Profit Allocation Engine (Phase 4B)**
9. Architecture draft for yield tracking + staking pools
10. Optional DAO-style governance logic
11.  **Final CI/CD Setup (Phase 4C)**
12. Docker + Render deployment pipelines
13. Monitoring + logging tool integration

Let's keep pushing — we're ahead of schedule and ready to impress investors!