

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

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	🟡 In Progress
Blockchain Route Test	Manus	➡️ SOON Next

Sprint 2 – Onboarding + Demo Finalization

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

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

- AI Onboarding Wizard
 - Wallet Security Dashboard
 - Quantum Indicator Overlay
 - Strategy Builder + Backtester
 - Subscription Management + Billing View
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Demo Walkthrough (Newly Populated)


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

Assets: - Flowchart diagram (to be added) - Screenshot walkthroughs (to be uploaded) - Embedded explainer video (pending final 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

 Let me know when you're ready to populate visuals or sync more source code into GitHub. We're cleared for full onboarding and investor preview now.