


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.  Related: AI Onboarding Wizard, Investor Deck Step 1


6. RiskToleranceStep

- 7. UI Component: RiskToleranceStep.jsx
- 8. Function: Slider-based or quiz-style profiling for risk
- 9. AI Tie-In: Influences trade types (options, futures, ETFs, etc.)
- 10.  Related: Strategy Builder, Risk Engine, Phase 5A RL Agent


11. TradingStyleStep

- 12. UI Component: TradingStyleStep.jsx
- 13. Function: Select style (Scalping, Swing, Long-Term)
- 14. AI Tie-In: Selects temporal patterns and indicators
- 15.  Related: AI Strategy Builder, Backtester, RL Training Interface





16. PlatformPreferencesStep

- 17. UI Component: PlatformPreferencesStep.jsx
- 18. Function: Choose preferred trading tools (TradingView, MetaTrader, ThinkOrSwim)
- 19. Integration: Activates relevant Middleware API modules
- 20.  Related: Middleware Framework, Phase 5C, TradingView Connector


21. StrategySelectionStep + CustomizationStep + ReviewCompletionStep





- 22. Function:
 - AI recommends strategy bundles
 - User fine-tunes preferences (risk limits, drawdown tolerance, stop-loss behavior)
 - Final confirmation screen
 - 23. UI Components: StrategySelectionStep.jsx, CustomizationStep.jsx, ReviewCompletionStep.jsx
 - 24.  Related: Final RL Onboarding Flow, CI/CD Test Cases, AI Persona Linkage
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Metadata & Linking Layer (Prototype Activated)

Each section now includes interlinks to: -  Impacts: What it changes downstream -  Dependencies: What it depends on upstream -  Phase: The implementation milestone -  Linked Docs: HLDD, Investor Deck, GitHub Code Refs

This structure will allow Notion to: - Auto-generate relation tables by tag or mention - Display "See Also" on all major docs - Provide dashboards filtered by impact, owner, or status

( Currently under construction — building cross-linked navigation maps)

 Confirm if you'd like: -  Phase-based traceability dashboard -  AI-driven summary of interlinked components -  Embedded links to Notion asset tables from each UI component

Next step: Roll out this structure to remaining sections in the Command Hub