

MODUS

Trading Dashboard

Beginner's Guide

Your First Steps to Smarter Trading

Version 35 - Complete Edition

<https://modus-trading.vercel.app>

Table of Contents

1. What is MODUS?
2. Getting Started
3. Understanding the Dashboard
4. Your First Chart Analysis
5. Setting Up Price Alerts
6. Using Ask AI
7. Essential Tips for Beginners

1. What is MODUS?

MODUS is an AI-powered trading dashboard designed to help traders make informed decisions. It combines real-time market data with artificial intelligence to provide chart analysis, price alerts, and trading insights - all in one intuitive interface.

Key Features:

- Live stock charts with real-time price updates
- AI-powered chart analysis that identifies patterns and trends
- Price alerts with SMS and browser notifications
- Daily Pick - AI selects the best trading opportunity each day
- Ask AI - Get answers to any trading question
- Position sizing calculator for risk management
- Trading journal to track your trades

2. Getting Started

Step 1: Access the App

Open your web browser and navigate to modus-trading.vercel.app. The app works on any device - desktop, tablet, or mobile phone. No download or installation required!

Step 2: Enable Notifications

When prompted, click 'Allow' to enable browser notifications. This lets MODUS alert you when your price alerts trigger, even if you're in another tab.

Step 3: Add Your API Key (Optional)

For AI features, click the Settings gear icon and enter your Anthropic API key. You can also enable 'Backend API' mode if available, which stores your key securely on the server.

TIP: Keep the browser tab open for alerts to work!

3. Understanding the Dashboard

The Sidebar (Left Side)

The sidebar contains all navigation options organized into categories:

- Live Ticker** - View real-time charts for any stock
- Market Overview** - See overall market conditions and indices
- Chart Analysis** - Get AI-powered analysis of any chart
- Alerts** - Set and manage price alerts
- Daily Pick** - AI's top trading pick for the day
- Ask AI** - Ask any trading question
- Journal** - Track and analyze your trades
- Portfolio** - Monitor your holdings

The Header (Top)

The header shows the current time, a status indicator showing background activity, and quick access buttons for Position Sizer, History, and Settings.

4. Your First Chart Analysis

Step 1: Click 'Live Ticker'

Select it from the sidebar to open the chart view.

Step 2: Enter a Stock Symbol

Type a ticker symbol like AAPL, TSLA, or SPY in the search box.

Step 3: Click 'Get Live Data'

This loads the real-time chart for your selected stock.

Step 4: Choose a Timeframe

Select from 1 minute to 1 month views. Start with '1 Day' for beginners.

Step 5: Click 'Chart Analysis'

Navigate to the Chart Analysis section in the sidebar.

Step 6: Run the Analysis

Click 'Analyze Chart' and wait 5-10 seconds for the AI to process.

Step 7: Read the Results

The AI provides trend direction, support/resistance levels, and trade suggestions.

TIP: The AI works best with 1-hour or 1-day timeframes for clearer patterns.

5. Setting Up Price Alerts

Price alerts notify you when a stock reaches your target price. You'll hear 3 rapid beeps and can optionally receive SMS notifications.

Creating an Alert:

- Go to 'Alerts' in the sidebar
- Click 'Create Alert'
- Enter the stock symbol (e.g., AAPL)
- Choose condition: Above, Below, or Equals
- Enter your target price
- Click 'Create Alert'

Setting Up SMS Alerts:

In Settings, enable SMS Alerts, enter your phone number, and select your carrier. When an alert triggers, you'll receive a text message!

WARNING: Keep the browser tab open - alerts only work when the app is running.

6. Using Ask AI

Ask AI is your personal trading mentor. You can ask any question about trading, technical analysis, chart patterns, risk management, and more.

Example Questions to Ask:

- "What is a head and shoulders pattern?"
- "How do I calculate position size?"
- "What does RSI mean and how do I use it?"
- "Explain support and resistance levels"
- "What's the difference between a limit and market order?"
- "How much should I risk per trade?"

TIP: Be specific in your questions for more detailed answers.

7. Essential Tips for Beginners

Start with Paper Trading

Practice with simulated money before risking real capital.

Use Longer Timeframes

1-hour and daily charts are easier to read than 1-minute charts.

Set Stop Losses

Always know your exit point before entering a trade.

Don't Overtrade

Quality over quantity - wait for good setups.

Keep a Trading Journal

Use the Journal feature to track and learn from your trades.

Trust the Process

Consistent small gains beat occasional big wins.

Keep Learning

Use Ask AI to continuously expand your trading knowledge.