



# SAMURAI

## USER GUIDE

**Free Support and Help:**

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## Table of Contents

What is SamurAI?.....	3
Getting started quick.....	4
Setting up your first scan.....	6
Customize, Save, Load scans.....	9
Export to Excel .....	11

## What is SamurAI?

Option Samurai is a decision support platform that helps you find the best trades in the options market. The platform is powerful, robust and highly customizable.

In this guide we cover:

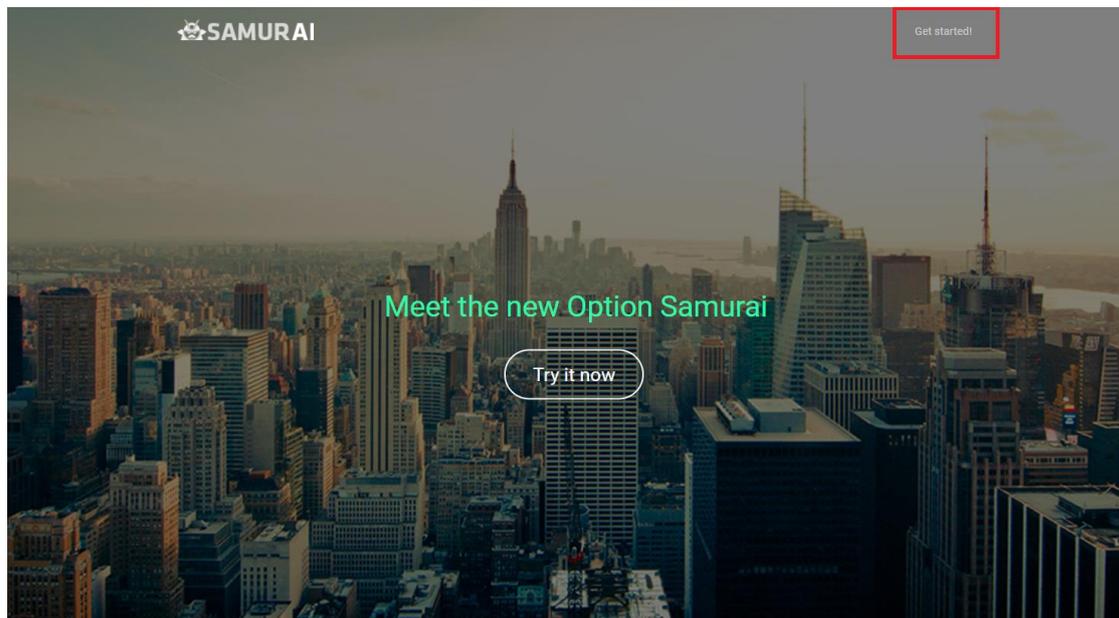
1. Getting started quick
2. Setting up your first scan
3. How to customize a scan, save it for later and easily access the saved results
4. Add columns and customize the result table
5. More features

## Getting started quick

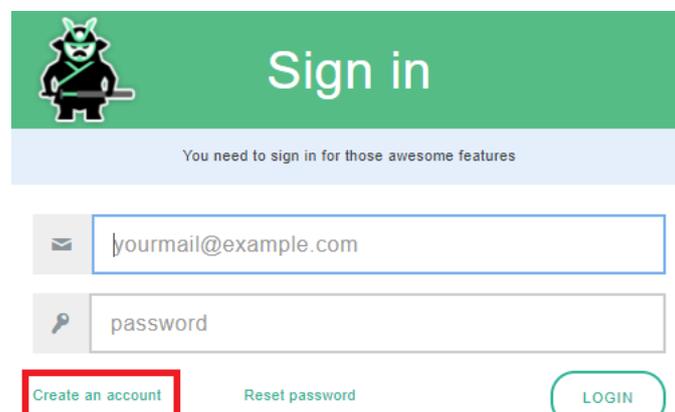
Option Samurai is a web based platform that can be accessed from anywhere, and on any device.

To sign up simply:

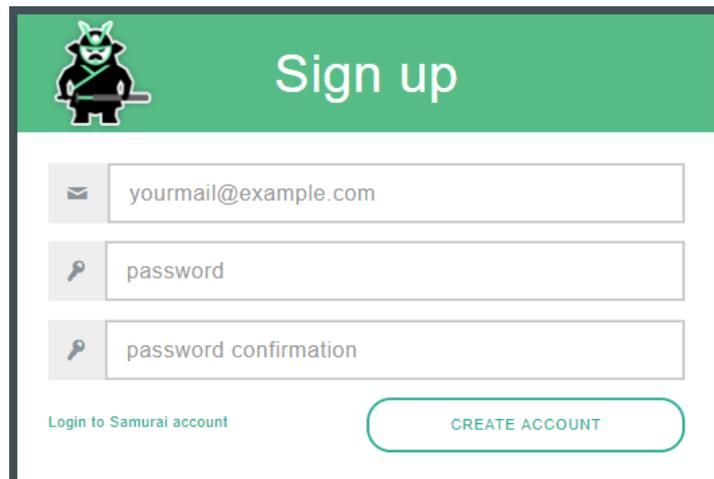
1. Go to [new.optionsamurai.com](https://new.optionsamurai.com)
2. Press 'Get Started!' link on the top right of the site.



3. If you have an account, jump to stage 7. If not, create one by following the next steps:
4. Click on 'Create an account' on the bottom left of the sign in window



5. Fill email + password. The password has to be more than 6 characters.

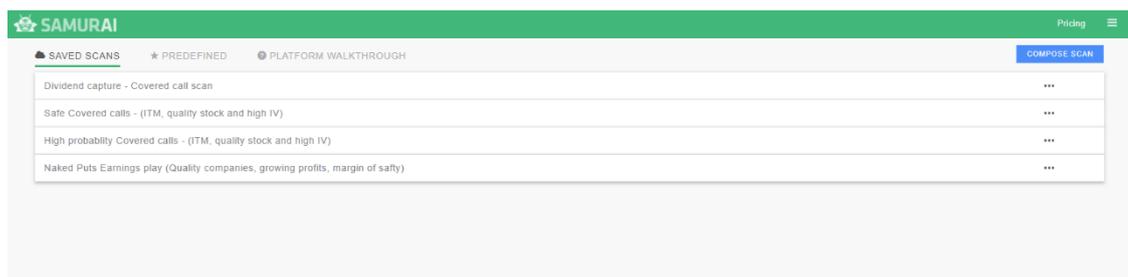


The image shows a 'Sign up' form with a green header containing the Samurai logo and the text 'Sign up'. Below the header are three input fields: an email field with the placeholder 'yourmail@example.com', a password field with the placeholder 'password', and a password confirmation field with the placeholder 'password confirmation'. At the bottom left is a link 'Login to Samurai account' and at the bottom right is a 'CREATE ACCOUNT' button.

6. You need to confirm your email address and you'll be taken to the dashboard.

7. If you have an account simply enter your email and password.

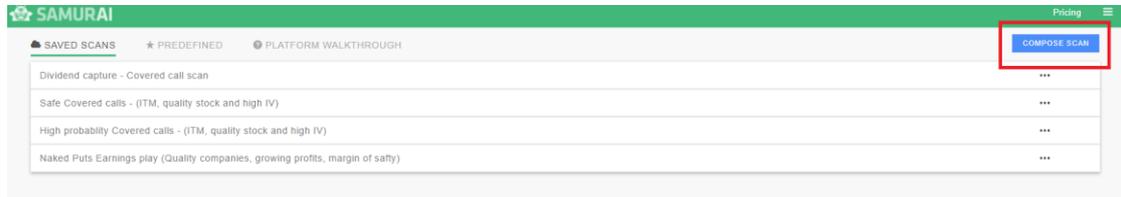
8. From the dashboard you can go to:



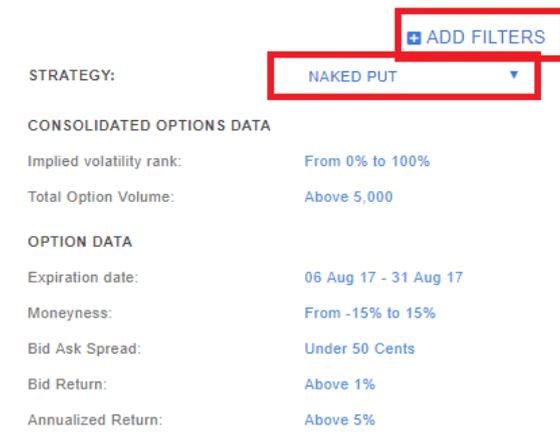
- Saved scans - See previous scans you've created. You can edit them or see results from the dashboard.
- Pre-defined - You can access pre-defined screens we are creating to generate new ideas and be more successful.
- Platform walkthrough - quick and easy way access to our knowledge base and help portal to learn all the benefits of the platform.
- Compose scan - start a new scan.

## Setting up your first scan

1. Click on 'Compose scan'

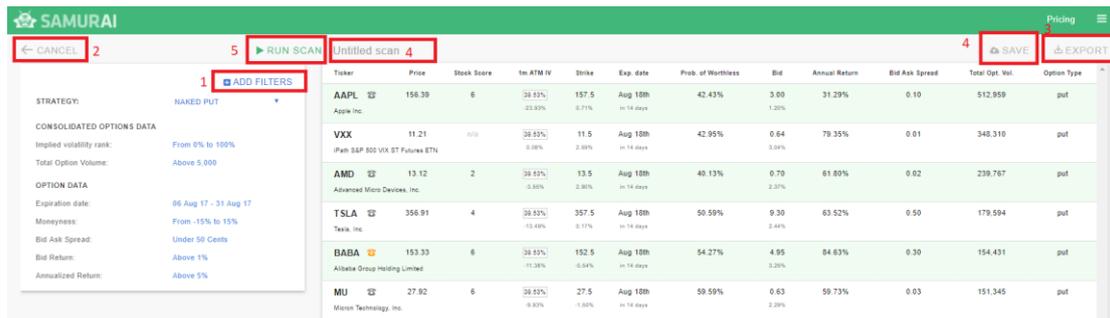


2. The scan page is opened. On the left you can easily see all the active filters and on the right the results.
3. Set up an example scan:
  - 3.1. To see all the puts we can sell on stocks with earning reports coming up we can:
  - 3.2. Change strategy to 'Naked Puts' from the strategy drop-down menu



- 3.3. Click add filter, and picking 'Earning date' Filter (you can search it by clicking 'earning' and it will find it before you finish). Click anywhere outside the window.
- 3.4. Go to the left menu and change:
  - 3.4.1. Click on Earning date and choose before expiration
  - 3.4.2. Change implied volatility rank to 50%-100%
  - 3.4.3. Click 'Run Scan' and you're done.

#### 4. Actions:



The screenshot shows the SAMURAI interface with a table of options data. The table has columns for Ticker, Price, Stock Score, Im ATM IV, Strike, Exp. date, Prob. of Worthless, Bid, Annual Return, Bid Ask Spread, Total Opt. Vol., and Option Type. The table lists several tickers including AAPL, VXX, AMD, TSLA, BABA, and MU. The interface includes a left sidebar with filters, a top navigation bar with 'CANCEL', 'RUN SCAN', and 'SAVE' buttons, and a right sidebar with 'EXPORT' and 'Pricing' buttons. Red boxes highlight the 'ADD FILTERS' button, the 'RUN SCAN' button, the 'SAVE' button, and the 'EXPORT' button.

4.1. **Add filters** - To add a filter (and columns) press the 'Add filter button on the top of the left menu. The add filters has search with auto complete to help you find filters quickly.

4.2. **Cancel** - Return to dashboard

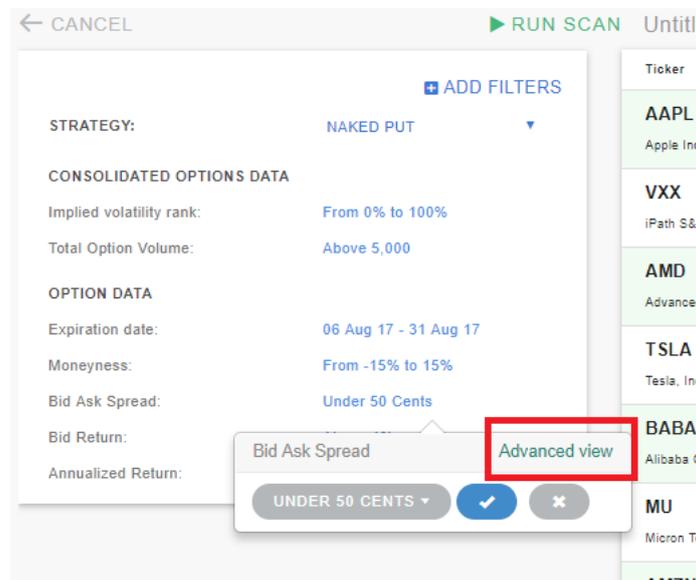
4.3. **Export to excel** - To export to excel just click the export button on the top right of the page. You can choose between exporting current results only or exporting all the results.

4.4. **Save scan** - You can save a scan by naming the scan (on the top of the table) and clicking the save button on the top right.

4.5. **Scan** - Press 'Run Scan' to run a new scan with the updated parameters

4.6. **Sorting** - You can sort the table by clicking the header. Clicking again will change back and forth between ascending and descending.

4.7. **Advance filters** - For easy filtering you can use the dropdown menu. You can use advance view and customize the filters by clicking the 'advance view'.



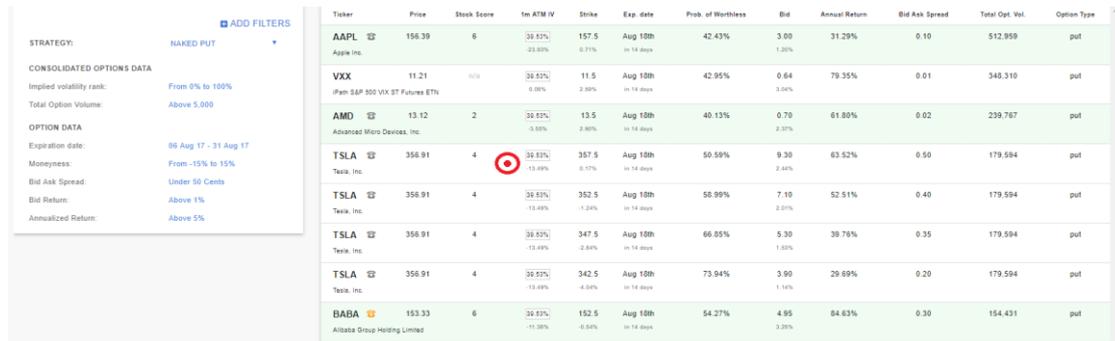
The screenshot shows the 'Advanced view' filter dropdown menu. The menu is open, showing a list of filters with their current values. The 'Bid Ask Spread' filter is highlighted, and the 'Advanced view' button is visible. The filters include: STRATEGY: NAKED PUT, CONSOLIDATED OPTIONS DATA, Implied volatility rank: From 0% to 100%, Total Option Volume: Above 5,000, OPTION DATA, Expiration date: 06 Aug 17 - 31 Aug 17, Moneyess: From -15% to 15%, Bid Ask Spread: Under 50 Cents, Bid Return: Under 50 Cents, and Annualized Return: Under 50 Cents. The 'Advanced view' button is highlighted with a red box.

4.8. More results - To make it easier to navigate the results we display the first 25 results. You can see more results via the pagination below the table.

5. Scan table:

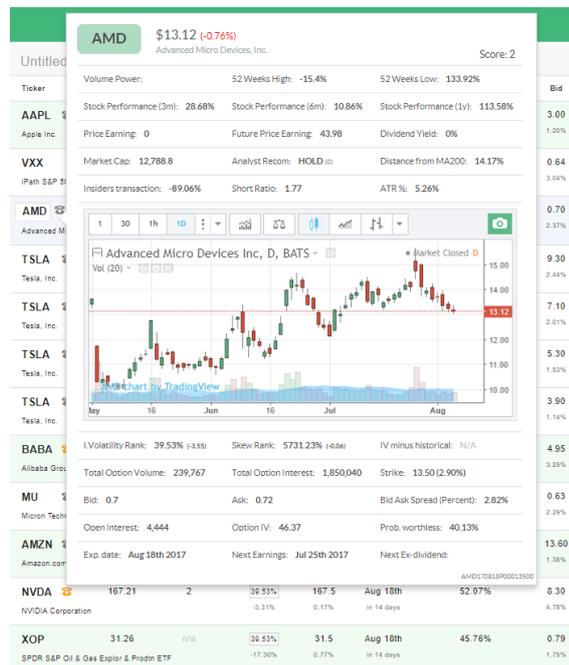
5.1. Each row in the table aggregates the different options results according to the underlying symbol.

5.2. The option characteristics in that row belongs to the best option. If you wish to customize click on the row and see more option-trading ideas.



Ticker	Price	Stock Score	Im ATM IV	Strike	Exp. date	Prob. of Worthless	Bid	Annual Return	Bid Ask Spread	Total Opt. Vol.	Option Type
AAPL	156.39	6	36.53%	157.5	Aug 18th	42.43%	3.00	31.29%	0.10	512,959	put
VXX	11.21	n/a	36.53%	11.5	Aug 18th	42.95%	0.64	79.35%	0.01	348,310	put
AMD	13.12	2	36.53%	13.5	Aug 18th	40.13%	0.70	61.80%	0.02	239,767	put
TSLA	356.91	4	36.53%	357.5	Aug 18th	50.59%	9.30	63.52%	0.50	179,594	put
TSLA	356.91	4	36.53%	352.5	Aug 18th	58.89%	7.10	52.51%	0.40	179,594	put
TSLA	356.91	4	36.53%	347.5	Aug 18th	66.85%	5.30	39.79%	0.35	179,594	put
TSLA	356.91	4	36.53%	342.5	Aug 18th	73.94%	3.90	29.69%	0.20	179,594	put
BABA	153.33	6	36.53%	152.5	Aug 18th	54.27%	4.95	84.83%	0.30	154,431	put

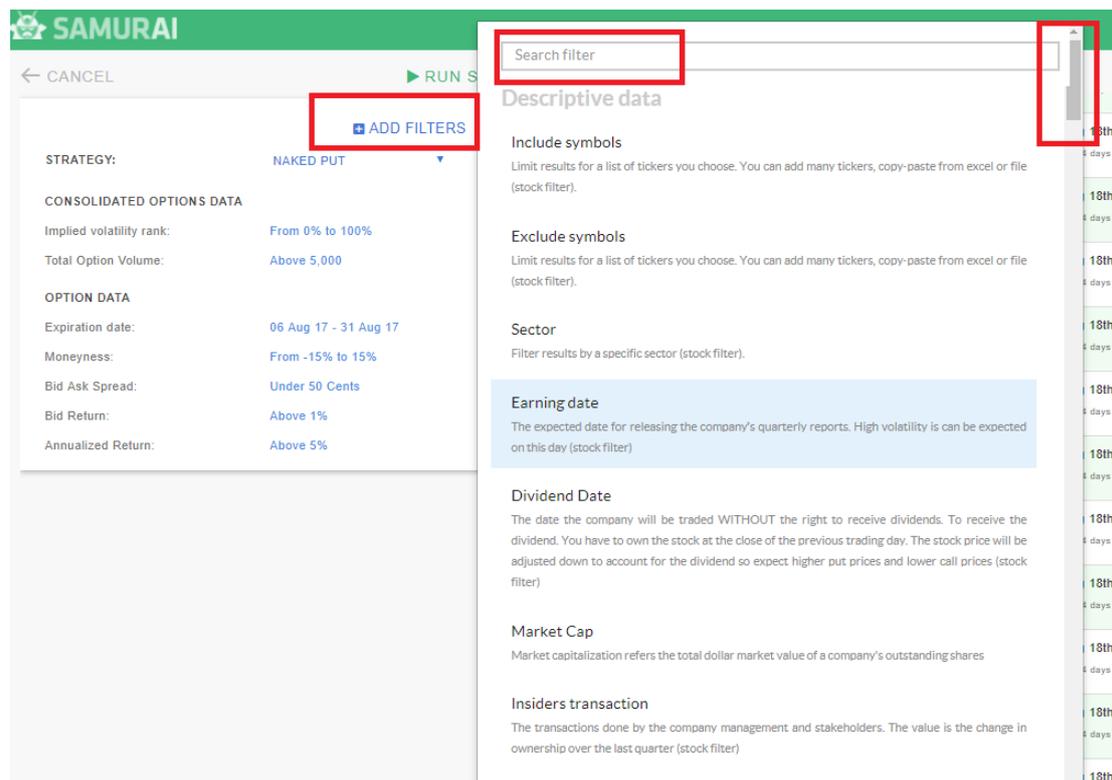
5.3. Clicking on the stock symbol will open more details window which will allow to better analyze the trade:



5.4. The icons next to the ticker indicates earnings or dividends that are coming up.

## Customize, Save and Load Scans

1. Click on 'Compose scan'
2. From the filters menu - pick as many filters as you need. You can use the search menu to easily find a filter that suits you (we have about 100 different filters)



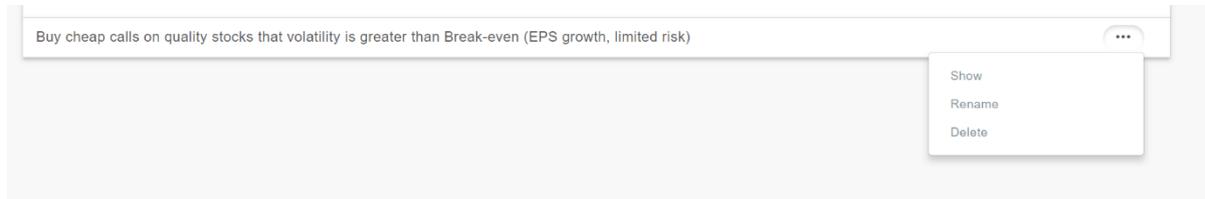
3. Set the parameters to all the filters and click 'Run Scan'.
4. If you are happy with the results, change the name of the scan and click 'Save'.
5. You will see the saved scan in your dashboard.



Ticker	Price	Stock Score	Im ATM IV	Strike	Exp. date	Annual Return	Total Opt. Vol.	Bid	Option Type	ATM vs Strike	Earn. date	Bid Ask Spread	EPS growth next year
SNAP	13.52	6	18.25%	11.5	Aug 18th	83.85%	115.042	0.37	put	-3.54	2017-05-10	0.11	33.30%

6. Clicking on the scan name will open the scanned results. The results are updated intraday.

7. Clicking on the 3 dots on the right will allow you to:

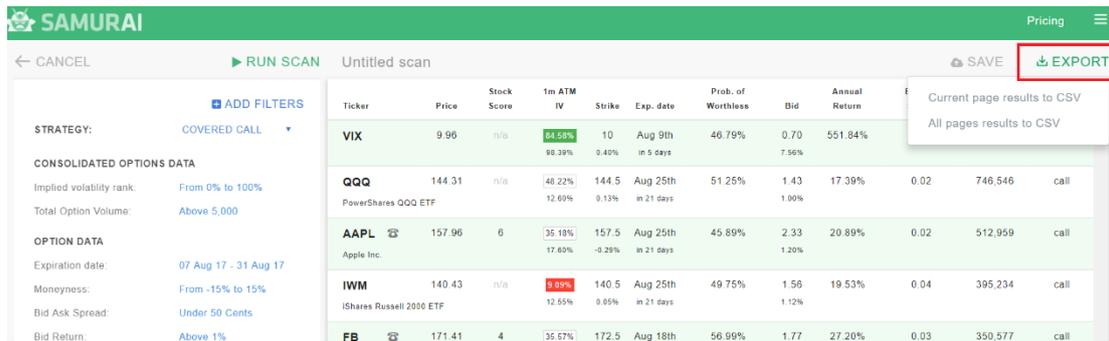


7.1. Show - Go to the scan page and edit the results.

7.2. Rename - Change the name of the scan

7.3. Delete - Delete the scan.

## Export to Excel



Ticker	Price	Stock Score	1m ATM IV	Strike	Exp. date	Prob. of Worthless	Bid	Annual Return		
VIX	9.96	n/a	64.59%	10	Aug 9th in 5 days	46.79%	0.70 7.56%	551.84%		
QQQ	144.31	n/a	48.22%	144.5	Aug 25th in 21 days	51.25%	1.43 1.00%	17.39%	0.02	746,546 call
AAPL	157.96	6	35.18%	157.5	Aug 25th in 21 days	45.89%	2.33 1.20%	20.80%	0.02	512,959 call
IWM	140.43	n/a	9.99%	140.5	Aug 25th in 21 days	49.75%	1.56 1.12%	19.53%	0.04	395,234 call
FB	171.41	4	35.57%	172.5	Aug 18th	56.99%	1.77	27.20%	0.03	350,577 call

1. In the scan page, clicking the export button will prompt you to export to excel.
2. You can:
  - 2.1. Export the current page results
  - 2.2. Export ALL pages (including the pagination) to excel.
3. The function will export the results **and columns** that are on screen to excel, So customize the table prior to exporting it to get all the data in excel and continue your analysis from there.
4. The export is in CSV format and is accessible all excel-like program such as: Excel, Numbers, Google sheets and more.