

QC-Copy Beginner's Guide

From your first sign-in to understanding copy-trading status

Start with Quick start, then choose Follow your own master account or Follow a Signal Pool signal. Each interface image has numbered explanations. Click an image in the HTML guide to enlarge it. Practice with demo accounts first.

Trilingual edition • V1.2 • Native client views • 2026-10-12

Scope: the English interface of the Windows PC client. Images use native v1.1.0.36 client views. Features were checked against the project implementation on 2026-10-12. Click the version number at the bottom of the main window to see your installed version.

How to use this guide

Start with Quick Start, then choose the route that matches your signal source. If something goes wrong, find the closest symptom in Troubleshooting and work through the checks. The HTML edition lets you search for button labels and keywords.

Images use native client windows and controls rendered offline with demo data. Accounts, states, signals and logs are illustrative; no trading server was connected. Dialog images show the window content area. Numbers are guide annotations. The sample details cannot be used to sign in or trade.

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START HERE

Quick start: set up your first copy relation

Complete these seven steps. Check the result of each step before continuing.

01 Have your details ready

Prepare your member email, member password and license code. For each trading account, have its login, password, MT4/MT5 platform and exact server name ready.

02 Sign in to QC-Copy

Sign in to the main window before adding trading accounts. Your member email is different from your trading account login.

03 Add and connect accounts

Open Accounts > Add Account. Save the account, select its row, and click Connect Account. Confirm that its state is Connected.

04 Choose the signal source

To follow your own account, add both a master and a follower, then open Relations and add a relation. To follow a pool signal, add your follower, choose a signal in Signal Pool, and add a relation.

05 Review the relation settings

Confirm which account supplies the signal and which account copies it. Check lot sizing, follow mode, symbol mapping and risk templates.

06 Save and start

Click Save and Start, or save first, select the target row in Relations, and click Start. Saving a configuration does not by itself start copying.

07 Verify the result

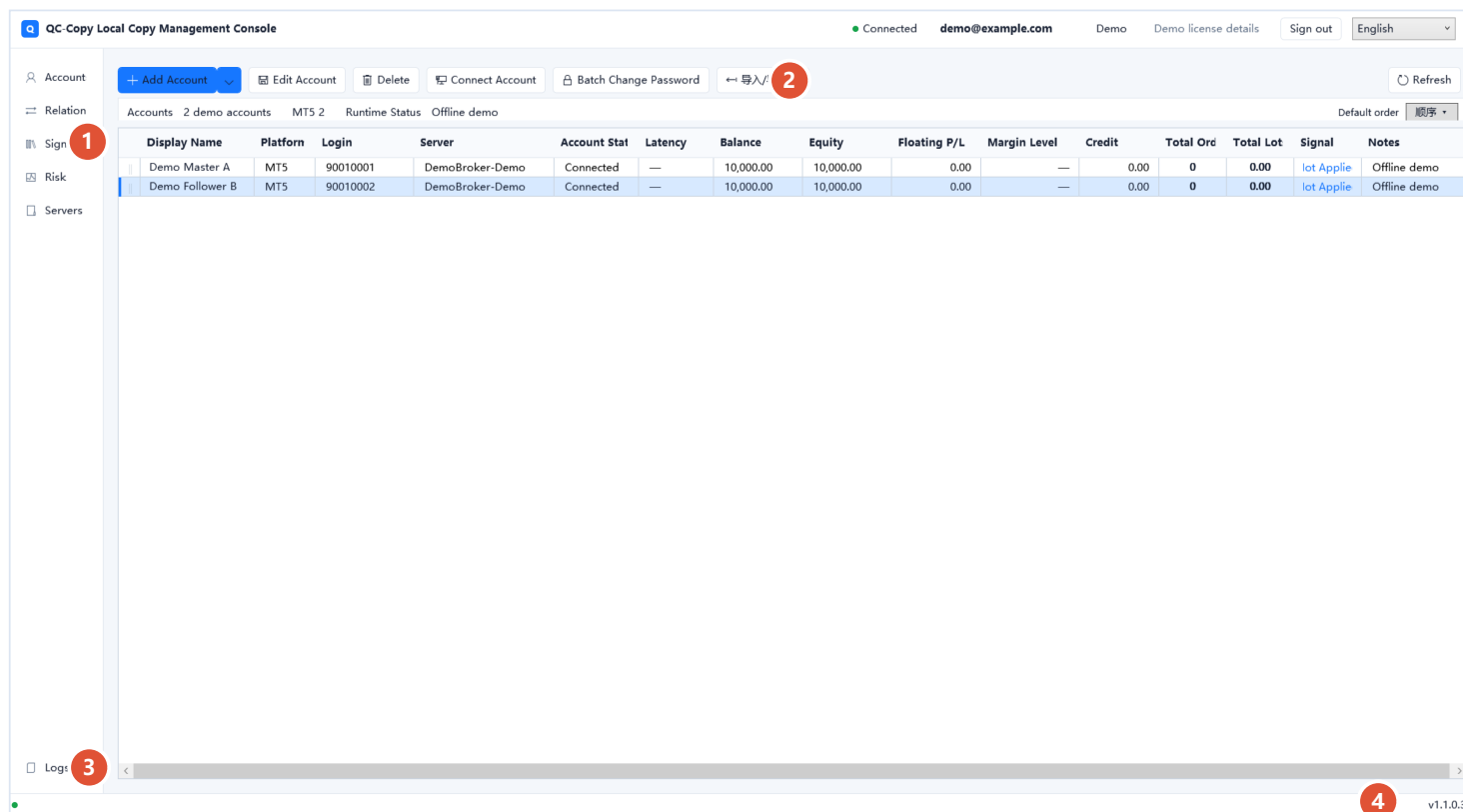
Check the target relation status, risk status, orders and logs. First use demo accounts to verify an opening trade and any closing action that your selected mode should copy.

Remember these three points

Pausing does not close existing positions. The top-right × normally hides the window in the system tray. In Open Only mode, you must manage the copied positions yourself after they open.

Quick start: set up your first copy relation

Find your way around the main window



1 The left navigation shows Account, Relation, Signal Pool, Risk and Servers. Account and Relation open the accounts and relations pages described in this guide. Add accounts before configuring a relation.

2 The action area is above the current page. This image shows Accounts.

3 Use Logs at the bottom left to review actions and error messages.

4 The version number is at the bottom right. Record it when requesting support.

Native client view rendered offline with demo data; no trading-server connection. Connected is shown only to demonstrate where the state appears; it does not indicate a connection to a real account.

PREPARE 01

Know your logins, passwords and account roles

Your member account signs you in to the software. A trading account connects to a trading server. Keeping them separate makes setup easier.

Item	Where it is used	Where to find it
Member email and member password	The QC-Copy Member Login window	The email and password used when registering your membership
License code	License Code in the QC-Copy sign-in window	Your valid software license information
Trading login, server and platform	Accounts > Add Account	The account-opening details or your existing MT4/MT5 terminal
Trading / master password	An account that needs to execute copied trades	The trading account password that grants trading permission
Investor password	Read-only viewing or applying to become a signal source	The trading account password that grants read-only access

The master supplies trading actions. The follower executes them according to your rules. This guide calls them A and B: B follows A. In this version, the Role list shows Master and Follower.

- Give each account a clear Display Name, such as Demo Master A and Demo Follower B.
- For your first practice, use demo master and follower accounts with no open positions or pending orders. This makes new orders easier to identify.
- Keep the software running and the computer connected to the network. The local application cannot continue processing copied trades while the computer is shut down or asleep.

If you do not yet have membership details or a license code

Confirm your membership and license through the official channel that supplied the software. The PC sign-in window has no separate registration entry. Do not enter a trading login in Member Email.

PREPARE 02

Open the software and sign in

Start the PC client supplied through the official channel. The Member Login window opens.

01 Choose the English interface

Select English in the sign-in window. If Compact and Charts are available, Compact hides dashboard charts and Charts shows them. These options do not grant different copy-trading permissions.

02 Enter your membership details

Enter Member Email, Member Password and License Code. Select Remember sign-in details only if you want to keep them on your own computer.

03 Click Sign in

First use activates the license code and binds it to the current computer. Confirm that this is the computer you intend to use.

04 Check the main window

After signing in, you should see the accounts and relations pages, Signal Pool, Risk, Servers and Logs. The left navigation may display the singular labels Account and Relation; these open the accounts and relations pages described below.

What success looks like

The main window opens and your membership and license information is visible. You have signed in to the software; you have not yet connected a trading account or started copying.

What you see	What to check first
Membership details are rejected	Check your member email, member password and license code. Do not substitute a trading account password.
A license, expiry or device message	Check the license information and confirm its status through official support.
Dashboard charts are missing	Check whether Compact is selected. Accounts and Relations remain available.
The member server is temporarily unavailable	Check your network and record the complete message. Repeatedly changing trading account details will not resolve this.

[Open the software and sign in](#)

Member Login: enter the three required details

QC-Copy Member Authorization
Sign in with your member email, password, and license code.

中文 English

Compact Charts

Lower resource usage

Member Email

1 demo@example.com

Member Password

2

License Code

3 DEMO-LICENSE-EXAMPLE

☐ Remember sign-in details

v1.1.0.36

4 Sign in

First use automatically activates the license code and binds this computer.

1 Member Email: enter your QC-Copy member email, not a trading login.

2 Member Password: enter your membership password.

3 License Code: enter your valid software license code.

4 Review the details and click Sign in. First activation binds the license to this computer.

Native client view rendered offline with demo data; no trading-server connection. The email, license code and password are demonstration values. Use your own valid membership details.

GET STARTED 01

Add and connect trading accounts

Open Accounts > Add Account. Add both accounts when following your own master. For Signal Pool, first add your own follower account.

01 Choose the platform and role

Select the account platform, MT4 or MT5. Choose Master for the account supplying signals and Follower for the account executing copied trades. Some versions may show the longer labels Master Account and Follower Account.

02 Enter the login and a clear name

Enter the trading account login. Use a recognizable Display Name, such as Demo Master A.

03 Select the server

Type a keyword in Server Name, then select the exact server from the results. Check the complete broker and Demo/Real name. Select IP/Port and review the address and port that appear. Do not leave only a search term or guess an address.

04 Enter the password and save

A follower needs a password with trading permission. Keep Enable Account selected and save. The software validates credentials when you enter a new password; read the message if saving fails.

05 Connect and check

Return to the account list, select its row, and click Connect Account. Check the connection state and whether Balance and Equity are displayed correctly.

Connected does not always mean able to trade

An account connected with an investor password is read-only. A follower still needs trading permission to place orders. If the log reports read-only access or no trading permission, check the password type first.

If the account already exists

Select the existing account and click Edit Account. Avoid adding repeated records for the same trading account.

Add and connect trading accounts

Account list: add, connect and check the state

1 Add Account		Edit Account	Delete	2 Connect Account	Batch Change Password	导入/导出	Refresh							
Accounts 2 demo accounts MT5 2 Runtime Status Offline demo													Default order 顺序	
Display Name	Platform	Login	Server	Account Stat	Latency	Balance	Equity	Floating P/L	Margin Level	Credit	Total Ord	Total Lot	Signal	Notes
Demo Master A	MT5	90010001	DemoBroker-Demo	Connected	—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	lot Apply	Offline demo
Demo Follower B	MT5	90010002	DemoBroker-Demo	Connected	—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	lot Apply	Offline demo
3														

1 Add Account opens the account details window.

2 After saving, select the account row and click Connect Account.

3 Check Account State for the connection result, and review Balance and Equity.

Native client view rendered offline with demo data; no trading-server connection. The two demonstration rows distinguish Master A from Follower B. Their displayed states are not live connection results.

Add and connect trading accounts

Account Info: enter Follower B

Account Info

Platform MT5

Role 1 Follower

Trading Login 90010002

Display Name Demo Follower B

Server Nam 2 DemoBroker-Demo Ping

IP/Port demo.example.com:443 | Untested | —

Server Address: demo.example.com

Port 443

Password 3 ●●●●●●●●

Notes Offline demo details. No trading server connection.

☒ Enable Account

Server Info

Broker / Company Demo Broker

Type / IPs Demo / 1

Best / Avg Latency — / —

Current IP demo.example.com:443

Current Latency Untested / —

Source File Demo directory

4 Save Cancel

1 Choose the platform and Role. This example uses MT5 and Follower.

2 Search for and select the exact server, then check IP/Port. Do not copy the demonstration values.

3 Password: the follower needs a trading password that allows order execution.

4 Keep Enable Account selected and click Save. Then return to the account list to connect.

Native client view rendered offline with demo data; no trading-server connection. Follower is the account that copies trades. DemoBroker-Demo and the sample address are not usable trading-server details.

WHEN NEEDED

If you cannot find the server

Confirm the complete server name, then use Servers to search. Similar names can belong to different account environments.

01 Check the original account details

Confirm the platform and full server name in the account-opening details or your existing MT4/MT5 terminal. Pay attention to Demo, Live, Real and numbered suffixes.

02 Search Servers

Open Servers in the left navigation. Enter the server name or a broker keyword, then review the matching records and their platforms.

03 Try an online search if it is not listed locally

Use Online search in the search area (shown as “在线Search” ; Chinese label “在线搜索”). Review the returned server records and follow the dialog instructions to select and import them.

04 Import a server file if you have one

Use Import Servers to select an MT4 Servers.ini or MT5 servers.dat file. Use server details only from a source you have verified.

05 Return to the account and select it again

Edit the account, choose the correct server, save, and connect. If needed, use Ping to check endpoint reachability first.

A ping test and an account connection check different things

Ping helps show whether a server endpoint is reachable. Use Connect Account to check the login and password. A latency value alone does not prove that the account can trade.

Problem	Check in this order
The server name is not found	Full server name > MT4/MT5 platform > online search or a server file
Ping succeeds but sign-in fails	Trading login > matching server > password > account status
Several names look similar	Compare the name character by character with your account details. Do not choose only by the lowest latency.
It still will not connect	Record the time and exact log message, then contact support. Do not send passwords.

If you cannot find the server

Servers: search and inspect endpoints

2 Import Servers

Test Latency

Delete

Copy Name

导入/导出

Refresh

1 demoBroker

在线Search

All Types

Demo directory: 1 server / 1 endpoint

Server Directory

MT5 Servers 1 server

Server Name	Broker / Company	Type	IP Coun	Source File	Updated At	Notes	Actions
DemoBroker-Demo	Demo Broker	Demo	1	Demo directory	2026-10-12	Offline demo serve	

Server Details

Server Name

DemoBroker-Demo

Platform / Type / Endpoints

MT5 / Demo / 1

Broker / Company

Demo Broker

Latency Overview

Best Latency

Average Latency

IP/Port and Latency

3

Host/IP	Port	Latency	Status	Actions
demo.example.com	443	—	Untest	

1 Enter the server name at the top right. Use Online search, shown as “在线Search” (Chinese label “在线搜索”), if needed.

2 If you already have an MT4/MT5 server file, use Import Servers.

3 Select a server and check its full name, platform, type and IP/Port in the right-hand details.

Native client view rendered offline with demo data; no trading-server connection. Latency is shown as a dash and endpoints are untested. This does not establish that a server is reachable.

ROUTE A

Follow your own master account

Have the master and follower accounts added. Open Relations > Add Relation.

01 Name the relation and choose its source

In Bindings and Parameters > Basic Binding, enter a clear Relation Name. Set Master Signal Source to Local Master.

02 Select the master and follower

Select A in Local Master and B in Follower Account. Check that Enable Relation and Enable Follower match what you intend to run.

03 Review the copy rules

Use the later chapter on copy rules to check lot sizing and follow mode. Read about Full Copy when you want to copy openings and subsequent trading actions. Choose Open Only only when you intend to manage the copied positions yourself afterward.

04 Check symbols and risk settings

Check whether the source and target symbol names match. Open Symbol Mapping if a mapping is needed. Explicitly select and enable any risk template for this relation.

05 Save the configuration and start

Use Save if you still need to review it. Once ready, click Save and Start. Alternatively, save, return to Relations, select the target row, and click Start.

What success looks like

The relation list shows the correct master and follower, and the target relation/follower displays Copying. Then check logs and actual orders. A successful save alone does not prove that copying works.

Select just one target relation for your first practice

Relations distinguishes a whole master group from an individual follower row. Check the selected scope before acting so you do not start or pause other followers too.

Follow your own master account

Local Master: A supplies the signal and B copies it

Relation Configuration ☒ Enable Relation

Bindings and Parameters Relation Risk Symbol Mapping Advanced

Basic Binding

Relation Name: Demo B follows A

Master Sig: **1** Local Master Signal Pool M: Select an account

Local Mast: **2** Demo Master A (MT5 90010001) / DemoBroker-Demo Follower A: **3** Demo Follower B (MT5 90010002) / DemoBroker-Demo

Binding Option: ☒ Enable Follower ☐ Reverse Copy

Manual Policy: Alert Only

Notes: Offline demo configuration. No account connected, saved or started.

Copy Parameters

Rule Template: Add Ten Delete T Rule Name: Demo Multiplier Rule

Lot Mode: Multiplier Fixed Lots: Min Lots: Order Source: API

Lot Multiplier: 1

Max Lots: Follower Magi: Follower Comr: Follow Mode: Full Copy

Open Only copies entry actions only; follower SL/TP, modifications, partial close and close remain self-managed.

Copy Options: ☒ Stop Loss ☒ Take Profit ☒ Pending Orders ☒ Partial Close ☒ Sync Close ☒ Modify

Save **4** Save and Start Cancel

1 Set Master Signal Source to Local Master.

2 In Local Master, choose master account A as the signal source.

3 In Follower Account, choose follower B to execute trades.

4 After reviewing rules, mappings and risk settings, choose Save or Save and Start as appropriate.

Native client view rendered offline with demo data; no trading-server connection. This is a configuration example only. It has not been saved or started. Review the settings before taking action. The native client clips some fixed-width labels; the instructions and numbered notes give their full names.

ROUTE B

Follow a Signal Pool signal

Have your follower account ready, then open Signal Pool. The available signals depend on what the server supplies and your membership permissions.

01 Sync and select a signal

Open Signal Pool and click Sync Signal Pool to update the available list. Select the signal you intend to follow.

02 Review the signal state

Check Cloud, Connection, Synced At, Runtime At and Error. Read any error details first; do not start based only on the signal name.

03 Click Add Relation

Confirm that Master Signal Source is Signal Pool Master. Check that Signal Pool Master contains the signal you just selected.

04 Bind your own follower

Select your own account in Follower Account. Review lot sizing, follow mode, symbol mapping and risk settings.

05 Save, start and verify

Check the target relation state in Relations. Use the orders and logs to confirm what actually executed.

You do not need Apply Signal to follow a pool signal

Apply Signal is for applying to make your own account a signal source. To follow a pool signal, select an existing signal and create a relation.

What you see	What to do
Signal Pool is empty or the desired signal is missing	First click Sync Signal Pool. Check membership permissions and license status, then ask support whether the signal is available to you.
A newly added relation does not run correctly	Check that your follower is connected and has trading permission. Open Logs and find the entries for that relation.
The signal is online but no trades are copied	Check the local relation state and actual orders. An online signal does not mean that your relation has started.

Sync Signal Pool retrieves the signal list supplied by the server. Refresh updates runtime data for signals already listed. If the list is empty, clicking Refresh alone is not enough.

Follow a Signal Pool signal

Signal Pool: sync first, then select a signal

1 Sync Signal Pool

3 Add Relation

Refresh

Signal Pool 1 demo signal Member Demo Only server-pushed signals are shown. Local accounts are matched only and not merged.

Signal	Platf	Login	Server	Cloud	Connec	Account Name	Curr	Balance	Equity	Profit	Lev	Posi	Lots	Local Match	Synced At	Runtime At	Error	Notes
Demo Signal S	MT5	90020001	DemoBroker-Demo	availal	Discon	Demo Signal A	USD	10,000.	10,000	0.00	1:10	0	0.00	—	2026-10-12 10:	—		Offline demo da

2

- 1 Click Sync Signal Pool to update the available signals.
- 2 Select the signal you want to follow and review Cloud, Connection, Synced At and Error.
- 3 Click Add Relation to open the relation settings.
- Native client view rendered offline with demo data; no trading-server connection. The signal row is demonstration data and Connection shows Disconnected. A listed signal does not mean that copying is running.

Follow a Signal Pool signal

Pool relation: choose a signal and bind your account

Relation Configuration ☒ Enable Relation

Bindings and Parameters Relation Risk Symbol Mapping Advanced

Basic Binding

Relation Name: Demo B follows Signal S

Master Sig **1** Signal Pool Signal Poo **2** Demo Signal S (MT5 90020001) / DemoBroker-Demo

Local Master: Demo Master A (MT5 90010001) / DemoBroker-Demo Follower A **3** Demo Follower B (MT5 90010002) / DemoBroker-Demo

Binding Option: ☒ Enable Follower ☐ Reverse Copy

Manual Policy: Alert Only

Notes: Offline demo configuration. No account connected, saved or started.

Copy Parameters

Rule Template: Add Ten Delete T Rule Name: Demo Multiplier Rule

Lot Mode: Multiplier Fixed Lots: Min Lots: Order Source: API

Lot Multiplier: 1

Max Lots: Follower Magi: Follower Comr: Follow Mode: Full Copy

Open Only copies entry actions only; follower SL/TP, modifications, partial close and close remain self-managed.

Copy Options: ☒ Stop Loss ☒ Take Profit ☒ Pending Orders ☒ Partial Close ☒ Sync Close ☒ Modify

Save **4** Save and St. Cancel

1 Set Master Signal Source to Signal Pool Master.

2 Check that Signal Pool Master contains signal S, the one you intend to follow.

3 Select your own follower B in Follower Account.

4 Review the rules, mappings and risk settings. Save or start only when ready.

Native client view rendered offline with demo data; no trading-server connection. After a pool source is selected, Local Master is disabled. Any greyed-out value left in that field is not the active source. The native client clips some fixed-width labels; the instructions and numbered notes give their full names.

CONFIGURE 01

Set copy rules: lots and follow mode

Open Relations > Add/Edit Relation > Bindings and Parameters > Copy Parameters.
Choose the volume and actions to copy.

Pause a running relation before editing it

Plan how existing positions will be managed, then pause and edit the relation. After saving, decide when to restart. Paused relations do not continuously synchronize order actions.

Lot mode or limit	What it means
Fixed Lots	Calculates the copied opening volume from the fixed value you enter.
Multiplier	Multiplies the master order volume by the chosen multiplier.
Equity Ratio / Balance Ratio	Uses the ratio of master and follower equity or balance, rather than simply repeating the master volume.
Min Lots / Max Lots	The volume bounds in the rule. Execution is also constrained by the symbol minimum volume, volume step and risk controls.

A calculation example only

At a multiplier of 0.5, a 0.10-lot master order gives 0.05 lots before other settings and contract rules. Check those too. These numbers illustrate the calculation, not recommended settings.

Follow mode	Intended behavior	What to check
Full Copy	Copies openings and the subsequent actions included in the mode.	Still review the actual options and execution results.
Open Only	Copies openings; you manage the positions afterward.	Does not automatically synchronize follower SL/TP, modifications, partial closes or closes.
Custom	Lets you select the copy options you need.	Review SL, TP, pending orders, closes, partial closes and modifications individually.

01 Check the template and values

After selecting a Rule Template, check the displayed Lot Mode, values and copy options. The template name alone is not enough.

02 Confirm direction and later actions

Reverse Copy changes trade direction. Leave it off for a same-direction demo. Confirm whether later closing actions should also be synchronized.

03 Save and test on demo accounts

During a trading session, test one demo trade. Compare the master and follower symbols, directions, lot sizes and subsequent actions.

Set copy rules: lots and follow mode

Copy Parameters: check volume and subsequent actions

Relation Configuration ☒ Enable Relation

Bindings and Parameters Relation Risk Symbol Mapping Advanced

Basic Binding

Relation Name: Demo B follows A

Master Signal: Local Master Signal Pool Master: Select an account

Local Master: Demo Master A (MT5 90010001) / DemoBroker-Demo Follower Account: Demo Follower B (MT5 90010002) / DemoBroker-Demo

Binding Option: ☒ Enable Follower ☐ Reverse Copy

Manual Policy: Alert Only

Notes: Offline demo configuration. No account connected, saved or started.

Copy Parameters

Rule Template: Add Ten Delete Ten Rule Name: Demo Multiplier Rule

Lot Mode: **1** Multiplier Fixed Lots: Min Lots: Max Lots: Order Source: API

Lot Multiplier: **2** Follower Magic: Follower Commission: Follow Mode: **3** Full Copy

Open Only copies entry actions only; follower SL/TP, modifications, partial close and close remain self-managed.

Copy Options: **4** ☒ Stop Loss ☒ Take Profit ☒ Pending Orders ☒ Partial Close ☒ Sync Close ☒ Modify

Save Save and Stop Cancel

1 Lot Mode determines how volume is calculated. Check its fixed value or ratio too.

2 Review Lot Multiplier, Min Lots, Max Lots and the contract constraints.

3 Follow Mode determines which actions are copied. Check carefully whether Open Only is selected.

4 Review each copy option, especially Stop Loss, Take Profit and Sync Close.

Native client view rendered offline with demo data; no trading-server connection. A multiplier of 1 and Full Copy are shown only to identify the controls. They are not recommended trading settings. The native client clips some fixed-width labels; the instructions and numbered notes give their full names.

CONFIGURE 02

Map symbols between accounts

Open Symbol Mapping in the relation settings. The same instrument can have different symbol names on different servers.

01 Check the actual names on both accounts

Confirm the symbol name used by the master order and the target symbol that the follower can trade.

02 For matching names, check tradability too

Without an explicit mapping, the software matches the same symbol name. That symbol must still exist and be tradable on the follower account.

03 Add a mapping when the names differ

In Symbol Mapping, click Add Mapping and enter or select the Source Symbol and Target Symbol.

04 Review every automatic match

Use Auto Match to find candidates. Check each name, contract size and currency, then click Add Selected. Review the table again and save the relation.

05 Check the multipliers and save

Review Lot Multiplier and Price Multiplier in the mapping. Do not try random multiplier changes to troubleshoot before you have verified the contract specifications.

What success looks like

In a demo test, the master source symbol maps to the intended target symbol. Direction, lots and price-related settings match your configuration.

Why a configured rule may still not copy

The target symbol may be missing, named differently, currently unavailable for trading or blocked by risk controls. Read the specific log message before deciding whether a mapping is needed.

Map symbols between accounts

Symbol Mapping: link the source and target symbols

Relation Configuration ☒ Enable Relation

Bindings and Parameters Relation Risk **Symbol Mapping** Advanced

When mappings are empty, symbols are matched by name. Enabled mappings route matched source symbols to target symbols. 1 2 Auto Match Add Mapp Remove M

Source Symbol	Target Symbol	Lot Multiplier	Price Multiplier
EURUSD	EURUSD.a	1	1

3

4 Save Save and St Cancel

1 Auto Match helps find candidates. Review each one before clicking Add Selected.

2 Add Mapping adds a source-to-target symbol pair.

3 Check Source Symbol, Target Symbol, Lot Multiplier and Price Multiplier in the table.

4 Save the relation after reviewing the mapping. Adding a table row alone does not save it.

Native client view rendered offline with demo data; no trading-server connection. EURUSD > EURUSD.a is a demonstration mapping. Verify the actual contracts on both accounts before using a mapping. The native client clips some fixed-width labels; the instructions and numbered notes give their full names.

CONFIGURE 03

Understand risk templates and states

Manage templates in Risk, then select the required templates in each relation. A saved template is not automatically enabled for that relation.

Item	When it checks	Where to enable or inspect it
Pre-order Risk Template	Checks conditions before opening or retrying an opening trade.	Select and enable it in the current relation.
Fallback Template	Monitors periodically in the background and performs the configured actions.	Select and enable it in the current relation.
Risk Status / Fallback Status	Shows the relevant state for the relation.	View it in Relations. Hover over the state for details.

01 Read the template contents first

In Risk, review the conditions, thresholds and triggered actions. If someone supplied the template, confirm that it fits your operating plan.

02 Select the templates in the relation

Edit the relation and open Relation Risk. Check Enable pre-order risk template and Enable fallback protection as needed, and select their corresponding templates. Unselected templates are not applied automatically.

03 Save and monitor the state

Return to Relations and check Risk Status and Fallback Status. If a restriction appears, hover over it for details and use the logs to investigate.

04 Do not turn off risk controls at random to troubleshoot

Identify the condition that triggered and what it was intended to protect. Confirm the settings and your trading intent before deciding whether to change them.

Risk actions are not all the same

A configuration may reject new openings, pause copying or close positions. Read the actual action in the template. Do not assume every risk trigger has the same effect.

This guide does not prescribe universal thresholds

Account funds, instruments and strategies differ. No single set of values suits every account. This chapter explains where the controls are and what they mean; choose thresholds according to your operating rules.

Understand risk templates and states

Risk: inspect the template contents first

Offline demo: select a template in each relation before it takes effect.

导入/导出

Refresh

Fallback Template

Risk Template Management

Fallback Template

Template

Template

Template Name

☐ Enabled

Daily Loss Protection

Threshold

Risk Action

Message

Floating Loss Protection

Threshold

Risk Action

Message

New

Save

Toggle

Delete

Template Name	Summary	Rules	Enabled
---------------	---------	-------	---------

- 1 Use the tabs at the top to switch between Fallback Template and Risk Template Management.
- 2 Select an existing template, or create one and enter its name, conditions and thresholds.
- 3 Check the triggered Risk Action. Do not rely only on the template name.
- 4 Use New and Save at the bottom. After saving a template, select it in the relevant relation.

Native client view rendered offline with demo data; no trading-server connection. This is a blank template editor. No thresholds have been entered and no valid template has been saved.

Trilingual edition · V1.2 · Native client views

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Understand risk templates and states

Relation Risk: enable protection and choose a template

Relation Configuration ☒ Enable Relation

Bindings and Parameters | **Relation Risk** | Symbol Mapping | Advanced

1 ☒ Enable pre-order risk template

Pre-order Risk **2** Demo Pre-order Template ▼

Demo template. Configure conditions according to your own rules.

3 ☒ Enable fallback protection

Fallback Template Demo Fallback Template ▼

Demo template. Configure conditions and actions according to your own rules.

The pre-order risk template runs before open/retry. The fallback template is monitored by a background thread. Both are selected per relation and disabled when empty.

4 Save Save and St. Cancel

- 1 Select Enable pre-order risk template if you need checks before opening orders.
- 2 Choose the relevant Pre-order Risk Template and verify its actual conditions.
- 3 For background protection, select Enable fallback protection and choose its template.
- 4 After saving, return to Relations and check Risk Status and Fallback Status.

Native client view rendered offline with demo data; no trading-server connection. Both options are checked to show their locations. The demonstration templates do not establish that usable protection rules are configured. The native client clips some fixed-width labels; the instructions and numbered notes give their full names.

GET STARTED 02

Verify that copying really works

Check accounts, relations and orders in that order. A successful account connection is only the first check; the actual result on the follower is what matters.

01 Check account connections

In Accounts, check the target account state, Balance and Equity. Make sure the follower has trading permission.

02 Check which relation is running

In Relations, confirm the master signal and target follower, check that the target row shows Copying, and see whether risk controls are blocking an action.

03 Open the order list

Click the Total Orders or Total Lots number in Accounts or Relations, or right-click an account row and choose View Orders. Review the current orders.

04 Test a demo opening trade

Route A: use your existing trading terminal to place one test trade on the demo master, then check the follower symbol, direction, lots and logs. Route B: wait for a new action from the signal source and check its execution on your demo follower.

05 Verify the later closing action

Route A: after enabling close synchronization, close the test trade on the demo master and confirm what happens to the linked follower order. Route B: wait for the source to close, then check the follower. In Open Only mode, manage the follower order yourself on either route.

Completion criteria

The accounts are correctly connected, the target relation is running, the demo opening and selected subsequent actions match your configuration, and no unexplained error remains in the logs.

A useful daily checking order

Check connections and running state first, then risk controls and orders, and finally use the logs to diagnose problems. No new orders while there are no new signals does not necessarily indicate a fault.

Verify that copying really works

Relations: check selection, state and order access

+ Add Relation Edit Relation Duplicate Relation Delete Start Pause Add Position 导入/导出 Refresh																
Relations 1 group / paused 2 demo accounts MT5 2 Default order 顺序																
Account	Platfo	Server	Status	Risk Status	Fallback St	Latency	Balance	Equity	Floating P/L	Margin Level	Credit	Total Or	Total Lo	Basic Copy Rule	Follow	Notes
Demo Master A (90...	MT5	DemoBroker-De...	Paused			—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	Demo Multipli...	1	Offline de
Demo Follower B (...	MT5	DemoBroker-De...	Paused	Disabled	Disabled	—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	Multiplier 1 / F...	—	Offline de

1 The indented row is follower B. Confirm whether you selected a single follower or the whole master group before acting.

2 Check Status. After actually starting the relation, verify whether it shows Copying.

3 Review Risk Status and Fallback Status. Hover over them for details when needed.

4 Click the Total Orders or Total Lots number to view orders, then compare them with the trading terminal.

Native client view rendered offline with demo data; no trading-server connection. This example shows Paused, with risk and fallback protection disabled. It is not an example of successfully running copying.

EVERYDAY USE 01

Pause, catch up or exit: what happens

Select the correct relation or follower row before acting. Pausing copying and closing existing positions are separate operations.

Action	Result	What else to check
Pause in Relations	Stops copy monitoring for the selected scope; account connections remain.	Existing positions remain open. Pausing does not close them.
Start in Relations	Starts copying and recovery checks for the selected scope.	Check actual orders. Do not assume every action during the pause will be replayed exactly.
Add Position in Relations	Previews and confirms master orders that may need to be copied.	This can open real positions. Check the estimated order count and total lots first.
Top-right × in the main window	Normally hides the window in the system tray while the client keeps running.	Double-click the tray icon or choose Show Main Window (Chinese label: “显示主界面”) to return.
Sign out in the member area	Stops copying and returns to the sign-in window.	Signing out does not manage existing positions for you.
Exit Copy Trading in the tray menu (Chinese label: “退出跟单”)	Closes the client.	Local copying stops. Existing positions need separate management.
Delete Relation	Deletes the selected configuration; running relations are paused first.	Does not automatically close positions. Do not use deletion as a substitute for pausing or closing trades.

DAILY USE 01 • CONTINUED

After pausing: resume and backfill

01 Check positions after pausing

Confirm current positions in the trading terminal or order list. Paused does not mean that the account has no positions. Do not rely on the paused relation to keep synchronizing closes.

02 Compare the accounts before restarting

Compare master and follower positions and review the logs. After restarting, the system may recover missed closes or other actions for already linked orders according to the rules. Open Only still requires you to manage follower positions yourself.

03 Use the Add Position preview when catching up is needed

First make sure the target follower is running. Select the relation and click Add Position. Read the estimated order count, total lots and skipped-order reasons in the confirmation dialog. Execution happens only after confirmation.

Existing positions and recovery orders

Start and reconnection perform reconciliation and recovery. Whether older orders are copied depends on recovery protection, history and current rules; copying may also occur later automatically. Use flat demo accounts for your first practice. Manually review orders marked as missed during a pause or disconnection before deciding whether to use Add Position. Do not assume Start only accepts future new orders.

What Add Position means here

It copies eligible current master positions or pending orders that do not yet have matching follower orders. Followers that are not running or are paused are skipped. It is not a button that adds extra volume to every existing follower order.

EVERYDAY USE 02

Export settings or import them on another computer

Accounts, Relations, Risk and Servers each have import/export controls. Choose the module for the settings you want to save. This client's native English interface still contains some Chinese or mixed labels; the explanations below identify those labels.

01 Choose the export scope in the relevant page

For example, open Accounts > Import/Export (shown as “导入/导出”) and choose Export All Accounts (Chinese menu label: “导出全部账户”). To export only some accounts, select their rows first and choose Export Selected Accounts (Chinese menu label: “导出选中账户”). Other modules, such as Relations, work similarly.

02 Choose a location and file password

Choose the save location (shown as “Save位置”); Browse is labeled “浏览...”. Enter a file password of at least eight characters in “文件Password”, then repeat it in the confirm-password field, “确认Password”. This separate password encrypts the configuration file; keep it safely.

03 Decide whether to include account passwords

Decide whether to include account master passwords, investor passwords and investor-password change schedules. The checkbox reads “包含账户Master Password, Investor Password和观摩Change Password计划”. Before sharing a configuration, check whether the recipient really needs those details.

04 Export and check the result

Click Start export, labeled “开始导出”. Confirm the completion message and check that the file exists in the chosen folder.

05 Preview before confirming an import

Choose Import in the relevant module, select the configuration file, and enter its file password. Review conflict handling and password-overwrite options. Use Preview Import (Chinese label: “预览导入”), check the planned actions, then Confirm Import (“确认导入”).

A configuration export is not a full runtime backup

Module export packages do not contain orders, copy-trading runtime records, logs, membership sign-in state or runtime snapshots. Do not restore settings for live positions that still need management and assume that their old master/follower order links were restored too.

Checks after moving to another computer

Confirm the membership license and device binding on the new computer. After importing, recheck accounts, passwords, servers, relations and symbol mappings, then verify with demo accounts. To move existing positions and historical runtime records, contact support first for the complete migration procedure.

Decide when to start based on the actual configuration and state after import. An import-completed message does not mean that copying is running.

Export settings or import them on another computer

Export account settings: location, password and scope

Export demo account configuration (2 accounts).

Save位置 **1** D:\Backups\Demo-Accounts.qcaccounts 浏览...

文件Password **2** ●●●●●●●●

确认Password ●●●●●●●●

3 ☐ 包含账户Master Password, Investor Password和观摩Change Password计划

文件Use独立Password加密.导出包不包含order, 跟单Running记录, Logs, Member Login状态和Running快照.

4 开始导出 Cancel

1 Save location is shown as “Save位置” ; Browse is “浏览...” . Choose a folder you can find again.

2 Enter at least eight characters in the file-password field “文件Password” , then repeat them in “确认Password” (confirm password).

3 The checkbox beginning “包含账户Master Password” includes account passwords and investor-password change schedules. This example leaves it unselected.

4 Click “开始导出” (Start export), then check the completion message and the saved file.

Native client view rendered offline with demo data; no trading-server connection. The native mixed-language labels are preserved and explained below. The path is an example and no export was performed. Account-module files use .qcaccounts.

TROUBLESHOOTING

Quick troubleshooting reference

Find the row closest to what you are seeing and follow its checks in order.

Symptom	Check in this order
The account will not connect	Correct MT4/MT5 platform > matching login and server > correct password > network and log messages.
The account is connected but does not copy	Relation and follower enabled and running > follower trading permission > follow mode > symbols > risk controls > logs.
My account is missing from the follower list	Check that the account has been added and that its role allows it to act as a follower. Return to Accounts to verify.
Openings are copied but closes are not	Check for Open Only or a Custom mode without Sync Close. Then check whether the relation is paused, and review connection problems and logs.
Existing master positions were not copied after Start	Compare actual master and follower orders and review recovery logs. If catching up is needed, inspect the Add Position preview instead of repeatedly pressing Start.
A symbol is missing or cannot be traded	Check the target symbol name, mapping, contract details and trading session. Then read the specific error in the logs.
Risk Status shows a restriction	Hover for details. Identify the template condition and action before deciding whether to change anything.
Signal Pool is empty	Sync Signal Pool > network and membership license > whether that signal is available to the current member.
The window disappeared after clicking ×	Check the Windows notification area and hidden tray icons. Double-click the QC-Copy tray icon to show the main window.
The follower still has orders after Pause	Pause does not close positions. Review the orders and manage them separately according to your trading plan.
A duplicated relation is not running	Review the source, follower and all settings, then explicitly start it. Do not assume Duplicate Relation preserves the running state.
Import succeeded but the account cannot trade	Check whether passwords were imported, their type, the server and the account connection. Then check the target relation state.

Prepare these four things for support

Provide the software version, the time of the problem, an anonymized description of the selected account/relation, and the exact log text or a redacted image. Explain what you clicked, what you expected and what actually happened. Do not send member passwords, trading passwords or license codes.

Quick troubleshooting reference

Logs: record the time and exact message

QC-Copy Local Copy Management Console

Connected demo@example.com Demo Demo license details Sign out English

Account Relation Signal P Risk Servers

+ Add Relation Edit Relation Duplicate Relation Delete Start Pause Add Position 导入/导出 Refresh

Relations 1 group / paused 2 demo accounts MT5 2 Default order 顺序

Account	Platfo	Server	Status	Risk Status	Fallback St	Latency	Balance	Equity	Floating P/L	Margin Level	Credit	Total Or	Total Lo	Basic Copy Rule	Follow
Demo Master A (90...	MT5	DemoBroker-De...	Paused			—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	Demo Multipli...	1
- Demo Follower B (...)	MT5	DemoBroker-De...	Paused	Disabled	Disabled	—	10,000.00	10,000.00	0.00	—	0.00	0	0.00	Multiplier 1 / F...	—

Time Message

2026-10-12 10:00:01 [DEMO] Account 90010002 saved.

2026-10-12 10:00:02 [DEMO] Check the follower account, lots, symbol mappings and risk settings before starting.

2026-10-12 10:00:03 [DEMO] No real connection or copy action was executed for this screenshot.

Logs

v1.1.0.36

1 Click Logs at the bottom left to expand the log area.

2 Time on the left helps identify when the problem occurred.

3 Message on the right contains details. Keep the complete message when requesting support, and hide sensitive information.

Native client view rendered offline with demo data; no trading-server connection. The messages are explanatory demonstration entries, not records of actual trade execution.

QUICK REFERENCE

Common terms and a daily checklist

Plain-language explanations of the terms you will see in the interface.

Term	Meaning
Relation	A configuration linking a signal source, a follower account and copy rules.
Master signal / master account	The source of trading actions.
Follower / follower account	The account that receives and executes copied trades.
Lots	The unit of trading volume. One lot can represent different contract quantities for different symbols.
Balance	An account funds measure that usually excludes floating profit or loss on open positions.
Equity	Account value including current floating profit/loss and other relevant adjustments, as reported by the trading server.
Symbol Mapping	Matches a master symbol name to the actual instrument traded by the follower.
Investor Password	A password for read-only account access. It does not grant trading permission.
Logs	Messages recording actions, execution results and reasons for errors.
System tray	The Windows taskbar notification area. You may need to expand its hidden icons.

- Before starting: check the membership license, trading account connections, and relation/follower states.
- Before starting: review symbols, lots, follow mode and risk settings, and check for existing positions.
- While running: monitor orders, risk controls and error logs. Switching pages does not stop copying.
- Before pausing or exiting: confirm who will manage existing positions. Exiting the software does not close them.
- For extended operation: keep the computer on and awake, with a working network connection.
- If a problem occurs: record the version, time and logs before taking targeted corrective action.

After your first practice, you should be able to

Connect demo accounts, create a relation, verify the demo copying result, distinguish Pause from exit, and find the information in Logs that support needs.

Guide V1.2 · 2026-10-12. Native v1.1.0.36 interface images use offline demo data, with no trading-server connection. Numbers are guide annotations. After software updates, follow the current interface and messages.