Document: Troubleshooting Guide

Category: Trading Platform Technical Documentation

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Troubleshooting Guide: Common Issues & Solutions

Last updated: December 2024
Support: Available 24/7 via live chat or support@platform.com

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Quick Navigation

Strategy Issues

Strategy Not Generating Signals

Symptoms: - Strategy status shows "Active" but no trades for days/weeks - Activity log shows "Monitoring" but no signals - Backtest showed many trades, but live/paper trading shows none

Common Causes & Solutions:

1. Entry Conditions Too Strict

Problem: Strategy logic requires multiple conditions that rarely align simultaneously.

Example: - RSI < 30 (oversold) - AND Price at Bollinger Band lower - AND Volume > 2x average - AND Market trending up on daily chart

Solution:

```
→ Review strategy logic in Strategy Builder
→ Temporarily relax one condition (e.g., RSI < 35 instead of < 30)
→ Or change AND to OR for some conditions
→ Backtest with new parameters before deploying
```

How to check: - Navigate to: Strategy → Edit → Review Entry Conditions - Look for conditions with "AND" gates connecting many requirements - Use Preview Mode to see how often signals would have triggered historically

2. Wrong Timeframe

Problem: Strategy designed for daily charts but deployed on 1-hour charts (or vice versa).

Solution:

```
→ Verify strategy timeframe: Strategy Settings → Timeframe
→ Match to your original backtest timeframe
→ If changed, re-backtest on current timeframe
```

Quick fix: - Check backtest configuration - Ensure live deployment uses same timeframe

3. Asset Availability or Market Hours

Problem: - Asset not actively trading (low volume) - Market closed (applies to stocks, not crypto) - Asset delisted or unavailable on connected exchange

Solution:

```
→ Check asset status on exchange
→ Verify market hours (stocks: 9:30 AM - 4:00 PM ET)
→ Confirm asset listed on your connected exchange
→ Check 24h volume (should be >$1M for liquid trading)
```

4. Data Feed Issues

Problem: Platform not receiving current price data, so conditions can't be evaluated.

Solution:

```
→ Check system status: status.platform.com
→ Verify exchange API connection: Settings → Accounts
→ Refresh data feed: Strategy page → Actions → Refresh Data
→ If persists, contact support with strategy ID
```

Verification: - View live chart for the asset - If chart isn't updating, data feed issue confirmed

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Strategy Paused Automatically

Symptoms: - Strategy status changed from "Active" to "Paused" - Notification: "Strategy auto-paused due to [reason]"

Common Causes & Solutions:

1. Daily Loss Limit Reached

Problem: Cumulative losses for the day hit your configured maximum.

Check: - Navigate to: Dashboard → Today's Performance - View: Total Loss Today vs Daily Limit

Solution:

```
→ If losses legitimate: Wait until next trading day (auto-resumes)
→ If unexpected: Review trade logs to identify issue
→ If limit too tight: Adjust Settings → Risk Management → Daily Loss Limit
```

When to act: - Legitimate losses: Accept as part of risk management, let limit work - Bug or error: Contact support immediately

2. Maximum Drawdown Exceeded

Problem: Account equity dropped below configured drawdown threshold.

Check: - Dashboard → Performance → Current Drawdown vs Max Allowed

Solution:

```
→ Review recent trades to understand drawdown cause
→ Determine if market conditions changed
→ Options:
   a) Resume with lower position sizes
   b) Adjust strategy parameters
   c) Switch to different strategy
   d) Increase max drawdown limit (not recommended)
```

Important: Don't just increase the limit. Understand why drawdown occurred first.

3. Consecutive Losses Limit

Problem: Strategy hit X losses in a row (if configured).

Solution:

```
→ Review: Settings → Risk Management → Consecutive Loss Limit
→ Check recent trades for patterns:
   - Same mistake repeated?
   - Market regime changed?
   - Technical issue?
→ If pattern identified: Fix before resuming
→ If bad luck: Resume and monitor closely
```

4. Account Equity Below Minimum

Problem: Account balance dropped below platform minimum ($100 typical).

Solution:

```
→ Deposit funds to restore minimum balance
→ Or reduce position sizes to work with available capital
```

5. Manual Pause (Forgot You Did It)

Check: - Activity log shows: "Strategy paused manually by user"

Solution:

```
→ Simply click "Resume" if ready to continue
```

Too Many Signals / Overtrading

Symptoms: - 10+ trades per day on a swing trading strategy - Frequent entries and exits (churning) - High commission costs eating into profits

Common Causes & Solutions:

1. Entry Conditions Too Loose

Problem: Signal triggers on minor price movements.

Example: RSI strategy with threshold of 60/40 instead of 70/30 (way too sensitive)

Solution:

```
→ Tighten conditions:
   - RSI: Move from 40/60 to 30/70
   - Moving averages: Increase periods (20/50 → 50/200)
   - Bollinger Bands: Increase standard deviations (2 → 2.5)
→ Add confirmation requirements (wait 2 bars instead of 1)
```

2. No Minimum Hold Time

Problem: Strategy exits minutes after entry.

Solution:

```
→ Add minimum position duration:
  Strategy Settings → Exit Rules → Minimum Hold Time
  Set to: 4 hours (for intraday) or 1 day (for swing trading)
```

3. Tight Stop-Losses

Problem: Stop-loss too close to entry, getting hit by normal volatility.

Solution:

```
→ Widen stop-loss:
   - Use ATR-based stops (2x ATR typical)
   - Minimum 3-5% for crypto, 2-3% for stocks
→ Or reduce position size to accommodate wider stops
```

Trade-off: Wider stops = smaller positions (to maintain same dollar risk)

4. Wrong Timeframe

Problem: Daily strategy running on 5-minute charts.

Solution:

```
→ Match timeframe to strategy type:
   - Scalping: 1m, 5m, 15m
   - Day trading: 15m, 1h
   - Swing trading: 4h, 1d
   - Position trading: 1d, 1w
```

Paper Trading Differs from Backtest

Symptoms: - Backtest: +40% return - Paper trading (same period): +15% return - Different number of trades or timing

Common Causes & Solutions:

1. Realistic Slippage Now Applied

Why: Backtests can use optimistic fills; paper trading simulates real slippage.

Solution:

```
→ This is expected and healthy
→ Variance of 10-20% normal
→ If >30% variance, review slippage settings:
   - Backtest Configuration → Slippage Model
   - Should match paper trading settings
```

Action: Re-run backtest with realistic slippage (0.1-0.2%)

2. Commission Costs

Why: Backtest may not include commissions; paper trading does.

Impact: 0.1% per trade × 100 trades = -10% total return

Solution:

```
→ Always include commissions in backtests
→ Verify: Backtest Settings → Trading Costs → Commission
→ Set to exchange rate: 0.1% typical for crypto, $5-10 per trade for stocks
```

3. Look-Ahead Bias in Backtest

Why: Strategy accidentally using future data that wouldn't be available in real-time.

Example: Using tomorrow's high as today's stop-loss level

Solution:

```
→ Review strategy logic carefully
→ Ensure indicators only use past/current data
→ Common culprits:
   - "Future bar" references
   - Indicators that need future data to calculate
   - Exit conditions using next candle's data
```

Fix: Reconstruct strategy to avoid any future references

4. Market Conditions Changed

Why: Backtest on bull market, paper trading during bear market (or vice versa)

Solution:

```
→ Backtest across multiple market conditions:
   - Bull market period
   - Bear market period
   - Sideways/choppy period
→ Strategy should work reasonably in all three
```

Reality check: Some strategies only work in specific conditions (trend-following in trends, mean-reversion in ranges)

5. Different Data Source

Why: Backtest used one data provider, live uses different exchange with slightly different prices.

Solution:

```
→ Use same data source for backtest and live trading
→ Verify: Backtest Settings → Data Source = Live Trading Exchange
```

Execution Issues

Orders Not Executing

Symptoms: - Strategy generates signal - Order placed but not filled - Position remains "Pending"

Common Causes & Solutions:

1. Limit Order Not Reached

Problem: Using limit orders but price never reaches specified level.

Check: - Order Details → Order Type → Limit @ $X - Current price vs limit price

Solution:

```
→ Switch to market orders for faster execution
→ Or widen limit (buy higher, sell lower)
→ Settings: Strategy → Entry/Exit → Order Type → Market
```

Trade-off: Market orders fill immediately but with slippage

2. Insufficient Liquidity

Problem: Asset has low trading volume; large orders can't fill at desired price.

Check: - Asset 24h volume < $500k (illiquid) - Order book depth (via exchange)

Solution:

```
→ Reduce position size
→ Use smaller limit orders
→ Or switch to more liquid asset
```

Rule of thumb: Don't trade >1% of daily volume in single order

3. Exchange Maintenance or Downtime

Check: - Exchange status page - System Status: status.platform.com

Solution:

```
→ Wait for exchange to resume normal operations
→ Orders will execute when exchange back online
→ Or cancel and re-submit when available
```

4. Margin/Buying Power Insufficient

Problem: Not enough capital to execute order.

Check: - Dashboard → Available Capital - Position Size vs Available Capital

Solution:

```
→ Reduce position size in strategy settings
→ Or close other positions to free capital
→ Or deposit additional funds
```

Unexpected Slippage

Symptoms: - Entry price differs from signal price - 0.5-2% worse execution than expected - Market orders show significant price difference

Common Causes & Solutions:

1. High Volatility Period

Why: During volatile moves, price changes rapidly between signal and execution.

Solution:

```
→ Accept as normal during news events, high volatility
→ Reduce position size during volatile periods
→ Use limit orders if execution price is critical
```

Can't eliminate: Slippage is inherent to market orders in volatile conditions

2. Low Liquidity

Why: Thin order book, market order eats through multiple price levels.

Check: - Asset 24h volume - Order book depth (via exchange interface)

Solution:

```
→ Trade only liquid assets (>$1M daily volume minimum)
→ Reduce position size
→ Use limit orders to control execution price
```

3. Large Position Size

Why: Your order size impacts the market (you're moving the price).

Solution:

```
→ Reduce position size to <0.5% of daily volume
→ Split large orders into smaller chunks
→ Use VWAP/TWAP order types if available
```

Reality: If you're moving the market, you're trading too large relative to liquidity

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Stop-Loss Not Triggered

Symptoms: - Price hit stop-loss level - Position still open - Losses exceed intended stop-loss

Common Causes & Solutions:

1. Gap Down / Gap Up (Stocks)

Problem: Market opened significantly below your stop-loss (overnight gap).

Why: Stop-loss orders trigger at market open at first available price, which may be far below stop level.

Solution:

```
→ This is unavoidable with stop-losses on stocks
→ Use guaranteed stop-losses (some brokers, higher fees)
→ Reduce overnight exposure
→ Accept that stops protect but aren't perfect
```

2. Stop-Loss Order Not Active

Problem: Stop-loss was configured but not actually placed as an order.

Check: - Order log: Should show "Stop-Loss Order Placed" - Exchange interface: Verify open orders

Solution:

```
→ Verify Strategy Settings → Risk Management → Stop-Loss = Enabled
→ Check: "Auto-place stop-loss with every entry" checkbox
→ If disabled, enable and redeploy strategy
```

3. Exchange Rejected Stop-Loss

Problem: Exchange doesn't support your stop-loss order type.

Check: - Order logs → Status = Rejected - Reason: "Order type not supported"

Solution:

```
→ Use simpler stop-loss type:
   - From: Trailing stop with complex conditions
   - To: Fixed percentage stop-loss
→ Verify exchange supports order type before deploying
```

4. Price Moved Too Fast (Crypto)

Problem: Extremely volatile move; stop-loss triggered but filled far from stop level.

Why: This is slippage at the stop-loss level. Normal in fast markets.

Solution:

```
→ Accept as part of stop-loss execution reality
→ Use limit orders for stop-loss (but risk no fill)
→ Or trade less volatile assets
```

Important: Stop-loss guarantees exit, not exit price (except guaranteed stops)

Account & Connection Issues

Can't Connect Exchange Account

Symptoms: - "API connection failed" error - Can't authenticate exchange account - API keys not working

Common Causes & Solutions:

1. Incorrect API Keys

Problem: Copied keys incorrectly or used wrong key type.

Solution:

```
→ Generate new API keys on exchange:
   1. Log into exchange
   2. Account → API Management
   3. Create New API Key
   4. Copy carefully (no extra spaces)
→ Required permissions:
   ✓ Read account info
   ✓ Place orders
   ✓ View order history
   ✗ Withdraw funds (disable for security)
```

Double-check: Copy entire key including any dashes or special characters

2. IP Whitelist Not Configured

Problem: Exchange requires whitelisting our platform's IP addresses.

Solution:

```
→ On exchange, go to: API Settings → IP Whitelist
→ Add these IPs:
   - 52.34.12.45
   - 18.200.45.67
   - 54.160.23.89
   (Check our docs for current IP list)
→ Or disable IP restrictions (less secure)
```

Our IPs: Listed at Settings → API Connection → Help

3. API Permissions Insufficient

Problem: API key created without trading permissions.

Solution:

```
→ On exchange, edit API key:
   ✓ Enable "Spot Trading" or "Trade" permission
   ✓ Enable "Read" permission
→ Save changes
→ Wait 2 minutes for changes to propagate
→ Retry connection in platform
```

4. Two-Factor Authentication (2FA) Issue

Problem: API requests require 2FA code but platform can't provide it.

Solution:

```
→ On exchange, create API key without 2FA requirement:
   - Uncheck "Require 2FA for API"
   - Or use IP whitelist instead (more secure)
→ Note: Withdrawals should still require 2FA
```

API Connection Failures

Symptoms: - Strategy pauses with "API connection lost" - Intermittent "Can't fetch data" errors - Orders time out

Common Causes & Solutions:

1. Exchange API Downtime

Check: - Exchange status page - Twitter/status updates from exchange

Solution:

```
→ Wait for exchange to restore service
→ Strategy will auto-resume when connection restored
→ If critical, manually close positions via exchange website
```

Monitoring: We automatically retry connection every 30 seconds

2. API Rate Limiting

Problem: Too many requests to exchange API; temporarily blocked.

Why: Running many strategies on same exchange account.

Solution:

```
→ Reduce number of concurrent strategies
→ Increase strategy check interval:
  Settings → Strategy → Check Frequency → Every 5 minutes (vs every 1 minute)
→ Spread strategies across multiple exchange accounts
```

Exchange limits: Typically 1200 requests/minute

3. Network / Connectivity Issues

Check: - System Status: status.platform.com - Your internet connection

Solution:

```
→ Platform-side issues: We're working on it, auto-resolves
→ Your-side issues: Check internet, try different network
→ VPN issues: Some exchanges block VPNs, disable and retry
```

Insufficient Margin Errors

Symptoms: - Order rejected with "Insufficient margin" - Can't open position despite having capital - Leverage restrictions

Common Causes & Solutions:

1. Capital Already Allocated

Problem: Capital committed to other open positions or pending orders.

Check: - Dashboard → Capital Allocation - Open positions + Pending orders = Used capital

Solution:

```
→ Close some positions to free capital
→ Cancel pending orders
→ Or deposit more capital
```

2. Leverage Limits

Problem: Exchange/broker limits leverage for your account tier.

Check: - Exchange: Account → Leverage Settings - Account tier: Basic vs Intermediate vs Advanced

Solution:

```
→ Reduce leverage in strategy settings
→ Or upgrade account tier on exchange (KYC verification)
→ Or increase position size with cash (no leverage)
```

3. Position Size Calculation Error

Problem: Strategy calculating position size larger than available capital.

Check: - Strategy Settings → Position Sizing → Method

Solution:

```
→ Verify position sizing formula
→ Reduce risk percentage (2% → 1%)
→ Or manually cap position size maximum
```

Performance Issues

Strategy Underperforming Expectations

Symptoms: - Backtest: +50% return - Live/Paper: +10% return (or negative)

Common Causes & Solutions:

1. Overfitting in Backtest

Problem: Strategy optimized too much for historical data; doesn't generalize.

Solution:

```
→ Simplify strategy (remove complex conditions)
→ Re-backtest with out-of-sample data
→ Use walk-forward analysis
→ Accept that backtest results are best-case scenarios
```

Reality check: 30-50% reduction in live performance vs backtest is normal

2. Market Regime Changed

Problem: Strategy designed for trend-following, but market now range-bound.

Solution:

```
→ Analyze current market conditions
→ Match strategy type to conditions:
   - Trending: Trend-following strategies
   - Range-bound: Mean reversion strategies
   - Volatile: Reduce position size or pause
→ Consider multiple strategies for different regimes
```

3. Execution Costs Underestimated

Problem: High-frequency strategy; commissions destroying profits.

Calculate: - Trades per month: 100 - Commission per trade: 0.1% - Total cost: 100 × 0.1% × 2 (buy + sell) = 20%

Solution:

```
→ Reduce trading frequency
→ Negotiate lower commission rates
→ Switch to longer-timeframe strategies
```

Break-even: Need >20% gross profit just to cover costs in example above

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Higher Losses Than Expected

Symptoms: - Losses exceeding stop-loss levels - Drawdown larger than backtest showed - Unexpected capital erosion

Common Causes & Solutions:

1. Stop-Loss Slippage

Problem: Stop executed worse than intended level.

Solution:

```
→ Widen stops to account for slippage
→ Model 0.5-1% slippage in backtest
→ Reduce position size if slippage unbearable
```

2. Position Sizing Error

Problem: Risking more than intended per trade.

Check: - Actual loss per trade vs intended risk - Position Size Calculator: Settings → Tools

Solution:

```
→ Verify risk calculations:
   Risk = Position Size × Stop Distance
→ Should equal: Account × Risk %
→ If not, fix position sizing formula
```

3. Correlation in Multiple Strategies

Problem: Running 5 strategies, all long crypto; BTC crash hurts all simultaneously.

Solution:

```
→ Diversify across:
   - Asset classes (crypto, stocks, forex)
   - Strategy types (trend-following, mean reversion)
   - Timeframes (intraday, swing, position)
→ Limit total portfolio heat to 10%
```

Backtest Won't Complete

Symptoms: - Backtest stuck at 50% - "Processing..." for hours - Error: "Backtest failed"

Common Causes & Solutions:

1. Too Much Data / Too Long Timeframe

Problem: 5 years of 1-minute data = millions of bars.

Solution:

```
→ Reduce date range (test 1 year at a time)
→ Use longer timeframe (1-hour vs 1-minute)
→ Or wait longer (complex backtests take 5-10 minutes)
```

2. Complex Strategy

Problem: Strategy uses many indicators with nested conditions.

Solution:

```
→ Simplify strategy temporarily for testing
→ Remove less important conditions
→ Or be patient (may take 15-30 minutes)
```

3. Data Gaps or Errors

Problem: Missing data for certain dates; backtest can't proceed.

Solution:

```
→ Adjust date range to avoid gaps
→ Or Contact support to fix data issues
```

When to Contact Support

Contact us immediately if: - 🚨 Strategy won't stop/pause when commanded - 🚨 Unexpected losses >5% in one day - 🚨 Orders executing at wildly incorrect prices - 🚨 Account showing incorrect balance - 🚨 Withdrawals not processing

You can self-resolve: - ✅ Strategy not generating signals (follow steps above) - ✅ Connection issues (check status page first) - ✅ Understanding performance differences - ✅ Configuring settings

Information to provide when contacting support: - Strategy ID or name - Date/time of issue - Screenshots of error messages - Recent trade IDs if applicable - Steps you've already tried

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Additional Resources

Knowledge Base: - Backtesting Engine Guide - Strategy Builder Tutorial - Position Sizing Strategy

Video Tutorials: - Troubleshooting Common Issues (15 min) - API Connection Setup (8 min) - Understanding Slippage (10 min)

Community Forum: - Search existing issues - Ask questions - Share solutions

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Last updated: December 2024 | For urgent issues, use live chat (bottom right corner) or email support@platform.com

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For portfolio demonstration purposes