Your trades. Your review.

Start with your MetaTrader history. Build a useful record at your own pace.

PHONE SCREENSHOTS / COMPUTER REPORTS / REVIEW

Start with recent MT4 or MT5 trades from your phone. Use a computer report for a larger history.

Only visible information can be read. Missing tickets, opening times and costs stay unknown. Screenshot results are shown before costs and are kept separate from verified net results.

Product artwork uses illustrative account data. This software provides journalling and review tools, not trading signals or financial advice.

Your first session.

Follow these steps once, then use the reference pages whenever a tool is useful.

1. Choose your trading account

Match its currency and broker-server timezone to the trades you are uploading; this can differ from your phone's timezone.

2. Choose screenshots or a report

Start with recent MT4 or MT5 trades from your phone. Use a computer report for a larger history.

3. Upload and check the result

Open Import trades and select the right account. With screenshots, wait for saving and check the recognised rows. With an HTML report, compare the preview count and net result before confirming. Missing screenshot costs stay unknown.

4. Inspect one decision

Open your calendar or Trades, choose an imported trade and check its outcome and evidence. Historical reviews are optional. Try one quick review if useful, then Save review. Extra detail and a trading plan can wait; your Weekly Review is a separate step.

Saved trading accounts, trades and reviews are available when you sign in to the same Compound FX account on another device. Selected files, import previews and unfinished forms stay in this open workspace during tab changes, but do not transfer between devices or survive a reload. Save completed edits before switching devices; select the report again if the import is unfinished.

Your first review. Your next focus.

A record of your own decisions, lessons and follow-through.

Recognise the first win

A valid saved trade review earns your first-review milestone. The trade can be a loss or a win. Finishing setup, skipping a review or exploring the fictional sample does not earn it.

Choose one personal mission

Open My progress from Today or Reviews. Choose a suggested focus or write your own. Review my evidence opens your decisions alongside it; Include earlier decisions adds historical context. Your assessment stays personal.

Reveal your recorded week

Reveal my week opens your latest week with recorded decisions, labelled by date and account. Move through Your record, Notice the evidence, Keep a lesson and Carry one focus, or show the full briefing. Both use the same evidence and save action.

Keep a useful decision

Click A lesson to keep to open the lesson picker. Read a decision and choose Keep this lesson. Find it under Saved lessons or Reviews > My progress. Removing a bookmark keeps the trade and earned milestone.

Earn your weekly-review milestone

Your first saved Weekly Review earns its milestone, including an empty or partial week. Click that milestone to reopen a saved weekly review. Chapter progress has separate evidence requirements.

Build a chapter that stays

Four distinct completed weekly periods with eligible recorded decisions complete a chapter. Each week counts once across accounts. Your next reviewed week starts the next chapter. Taking a break does not reset your earned progress.

Let the evidence set the pace

Small or incomplete samples may not support a comparison. Keep unknown context unknown, continue an existing focus or choose no change. No extra trading is needed to earn or protect a reward.

Start with phone screenshots.

MT4 History or MT5 History > Positions. Recent trades are enough.

Screenshot your closed trades

MT4: History. MT5: History → Positions. Capture the full visible rows together.

Choose your account and upload

In Compound FX, open Import trades, select the destination trading account and choose up to five screenshots.

Save and start a review

Check the recognised rows, then save the details. Continue to your first review, or open your calendar to explore the trades that were saved.

What to include

Keep the instrument, buy/sell, size, entry and exit prices, closing date/time and profit visible.

Up to five PNG, JPEG or WebP images; 10 MB each; 100 positions per upload.

Only visible information can be read. Missing tickets, opening times and costs stay unknown. Screenshot results are shown before costs and are kept separate from verified net results. Check the recognised trades against your screenshots. Unclear or undated rows may need attention; you can continue with the trades that were saved.

Images are read on your device. Recognised text and trade details are saved to your Compound FX account. Screenshot image files are not uploaded or retained by this route.

Open the maintained screenshot guide

Get your file. One step at a time.

Choose the route that matches where you are.

I have my file

Open Import, choose your trading account and select the report. Check its preview before confirming.

Help me get my file

Use the Windows desktop walkthrough for your platform on the following pages.

No closed trades yet

No closed trades yet? Explore the example journal and keep your setup ready for later. You do not need to place a trade to try Compound FX.

On your phone?

These export steps use MetaTrader on Windows. On your phone? Email yourself the steps and continue on your computer. An existing desktop HTML report can also be uploaded from your phone's files. Your saved setup follows your login; the report file does not transfer with the email.

Open the interactive step-by-step guide

MetaTrader 4 / Windows

Steps 1-4 of 7. Keep the guide open beside MetaTrader.

01 Open the right trading account

Open the installed MetaTrader app on your Windows computer. Check that you are signed in to the broker account whose history you want.

Your broker account

You should see: The account you recognise, connected to its broker.

02 Show the bottom panel

Choose View, then Terminal.

View → Terminal

You should see: The Terminal panel beneath your charts.

03 Open Account History

Click Account History in the bottom panel.

Account History

You should see: A table of account history. It may be empty.

04 Show all your history

Right-click inside the history table. Choose All History, then wait for the records to load.

All History

You should see: History for the full available period.

MetaTrader 4 / Windows

Steps 5-7 of 7. Keep the guide open beside MetaTrader.

05 Create the report

Right-click inside Account History again. Choose Save as Report.

Save as Report

You should see: A report-saving window.

06 Keep the HTML file

If a Save window opens, choose Downloads and save the report. Keep its .htm or .html extension.

HTML report

You should see: A .htm or .html file you can select in Compound FX.

07 Return to Compound FX

Choose your trading account, select the report and open the preview. Check the closed-trade count and net result before confirming.

Check, then confirm

You should see: An import confirmation after the trades have been saved.

MetaTrader 5 / Windows

Steps 1-4 of 8. Keep the guide open beside MetaTrader.

01 Open the right trading account

Open the installed MetaTrader app on your Windows computer. Check that you are signed in to the broker account whose history you want.

Your broker account

You should see: The account you recognise, connected to its broker.

02 Show the bottom panel

Choose View, then Toolbox. If Toolbox is hidden, Ctrl+T toggles it.

View → Toolbox

You should see: The Toolbox panel beneath your charts.

03 Open History

Click History in the Toolbox panel.

History

You should see: Your account's history table. It may be empty.

04 Show all your history

Right-click inside the history table. Choose All History. Let the records finish loading.

All History

You should see: Records from the full available period.

MetaTrader 5 / Windows

Steps 5-8 of 8. Keep the guide open beside MetaTrader.

05 Switch to Positions

Right-click inside the history table again. Select Positions.

Positions

You should see: History grouped by position.

06 Open the HTML report

Right-click inside the history table again. Open Report, then choose its HTML option. The wording can vary by build.

Report → HTML

You should see: Your account-history report, or a window to save it.

07 Keep the HTML file

If a Save window opens, choose Downloads and save the report. Keep its .htm or .html extension.

HTML report

You should see: A .htm or .html file you can select in Compound FX.

08 Return to Compound FX

Choose your trading account, select the report and open the preview. Check the closed-trade count and net result before confirming.

Check, then confirm

You should see: An import confirmation after the trades have been saved.

If your screen looks different.

These checks help you find the right report without guessing.

I cannot see History

The bottom Toolbox or Terminal panel may be collapsed. Drag its top border upwards to reveal the tabs. Missing tabs do not prove there are no trades.

History is empty

Check the intended broker account, its connection and All History. If there are no closed trades, explore the example journal and return later.

The report opens in a browser

Keep the report open. In that browser, use Save page as and choose HTML only if offered. Save it in a known folder. Do not print to PDF. Browser and broker builds can differ; if you cannot find the HTML file, use the support link below.

The file will not import

English-language MT4 closed-trade and MT5 closed-Positions HTML reports are supported. Open positions, deposits and withdrawals are not imported as trades. Partial MT5 positions wait until fully closed. Unsupported layouts or separate account charges are flagged before import. PDF, Excel, Overview and strategy-tester files are different formats.

Updating your history

Export an updated All History report. Unchanged trades already saved are skipped; changed or conflicting tickets are blocked for checking.

Return to the maintained online guide

Find the right tool.

The following pages explain every workspace section from the same guidance used inside Compound FX.

Today — One useful next action, your current focus and your recorded results.

Risk calculator — Calculate a position size from your own risk budget, or estimate monetary and percentage risk from entered lots. Reuse checked instrument profiles and compare saved intentions with recorded outcomes.

Decision system — Connect your trading rules, setups and your own assessments to recorded decisions.

Trades — Keep the outcome and your own explanation together in one decision record.

Grouping — Inspect which broker executions belong to a decision and correct them when the evidence supports it.

Import — Bring your closed trades straight from MetaTrader into the right trading account.

Performance — Find where results came from and open the decisions behind them.

Reviews — Review your recorded week, keep a useful lesson and carry one personal focus forward.

Files — Attach private screenshots to a selected decision.

Account & settings — Manage your login profile, trading accounts, sessions, subscription and private data.

Help & support — Find instructions for every section and ask for help without exposing private records.

Decision system · Overview — A summary of plans, review completion and recorded adherence.

Weekly review — Review your recorded week, keep a useful lesson and carry one personal focus forward.

Trading plan — Record the rules shared across your trading activity.

Plan vs execution — Record your own assessment of entry, exit, risk, scaling and session adherence.

Monthly report — Read a calculated summary of reviewed trades, comparisons and repeated recorded behaviour.

My strategies & setups — Your private collection of strategies, setups, optional rules and chart screenshots. A strategy is a broader approach; a setup is the pattern that triggers an entry.

Objectives — Keep user-supplied targets and loss limits alongside recorded account results.

Accounts & imports — A summary of each account's records and reusable CSV column mappings.

Today

One useful next action, your current focus and your recorded results.

When to use it

Start each visit here.

What you add

Start with one trade review: why you entered, why you exited and whether you followed your rules. Extra detail is optional.

What Compound FX does

Today restores unfinished work first. Ready weekly reviews and eligible recent trades take priority over the optional focus prompt. Not now saves your preference; you can choose a focus later. Account-specific focuses only suggest trades from that account. Weekly loading or connection problems are shown separately from a quiet week. After saving a review, your recorded answers are kept together and you can finish for the day. Everyday trade, weekly and monthly reviews contribute to the same career level as optional deeper reviews and practice.

Steps

01 Follow the single suggested action on Today. Import your history if you have no trades yet.

02 Review one trade, see your saved answers and finish comfortably. Keep this lesson bookmarks the record. A focus is optional; Not now is remembered. Build my trading plan is an optional next step: name a strategy, write rules, then link one setup. Pause and resume it from Today; restarting the first-trade guide does not erase plan progress.

03 Today shows your level, reflection XP and next milestone from the start. Come back after trading or when your week is ready to review. Daily reflections are optional. Open the Progress tab for four career paths, your playbook, fictional practice and saved deep reviews.

Example

First visit: trading account → one recorded decision → one completed trade review.

Risk calculator

Calculate a position size from your own risk budget, or estimate monetary and percentage risk from entered lots. Reuse checked instrument profiles and compare saved intentions with recorded outcomes.

When to use it

Before entering a trade, or when reviewing a saved risk intention.

What you add

Current equity, account, instrument and direction. Choose Risk to lots with your percentage, or Lots to risk with your intended lots. Use entry/stop prices or a stop distance in price units, whole ticks or explicitly defined pips. Sizing requires tick size, tick loss value per lot already in account currency, minimum/maximum lots, lot step and optional round-trip costs. One pip is defined by the user; it is never inferred from the symbol.

What Compound FX does

Forward budgets and lot sizes are rounded down; reverse entered lots are validated against broker limits without silently rounding them. Displayed stop loss includes entered costs and is rounded up. Profiles store settings, scoped to account, broker, currency, instrument and direction; they do not fetch live tick values. Confirm current values before sizing. Up to three possible trade matches use account, exact symbol, direction, confirmed grouping and openings within 24 hours after the saved calculation. Suggestions are not associations or evidence of plan adherence. No live equity, prices, FX conversion, margin check, broker execution or recommended risk percentage is provided.

Steps

01 Open Tools → Risk calculator, or Calculate trade risk on Today. Select the account and optionally a saved trading plan. Selecting a plan uses its recorded risk limit as the starting percentage.

02 Choose a saved instrument profile or enter broker specifications once and save a named profile. A profile never stores a live equity balance or trade entry. Confirm the current tick loss value; confirmation clears on reload and profile changes. Up to 30 profiles are kept; removing one leaves calculation snapshots unchanged.

03 Choose Risk to lots or Lots to risk. Enter current equity, percentage or lots, then use Entry & stop or Stop distance. Ticks need the broker tick size; defined pips need your explicit pip size. Check the plain-language exposure summary against your own saved rule.

04 Save a calculation to preserve its inputs separately from later edits. Up to 20 records are kept; remove a record explicitly to make space. Saved inputs load with broker confirmation cleared.

Risk calculator / continued

Continue with the same tool and account.

05 After importing, open Use in trade review on a saved calculation. Choose a possible match or a loaded matching trade yourself. Compare saved budget/estimate with recorded initial risk and net result; missing data remains unknown. Explicitly confirm before adding a sized estimate to the review draft. Open selected review can inspect the exact trade without copying risk. Neither action automatically saves or marks it reviewed. Budget-only records never fill initial risk.

Example

An illustrative 10,000 GBP equity and a user-chosen 0.5% percentage gives a 50 GBP budget. Actual loss is not guaranteed or capped by this estimate.

Decision system

Connect your trading rules, setups and your own assessments to recorded decisions.

When to use it

Build your process gradually, alongside your journal.

What you add

You write the plan, setup criteria and adherence assessments. These are optional for your first import.

What Compound FX does

Weekly and monthly summaries use saved records; written rules are not automatically interpreted or enforced at your broker.

Steps

01 Choose Guided plan setup for an optional strategy → rules → setup journey. Pause whenever you like and resume from Today. Your saved choices can be selected in trade reviews.

02 Add your own setup in My strategies & setups for a particular repeatable opportunity.

03 Use Plan vs execution to assess an actual trade against those rules.

Example

A plan sets risk and trading hours; a setup defines the entry and invalidation for one type of trade.

Trades

Keep the outcome and your own explanation together in one decision record.

When to use it

After a trade, or after importing your history.

What you add

Add useful context. Risk, assessments, labels and notes are optional.

What Compound FX does

Net P&L is gross P&L plus signed fees/swap. R is net result divided by positive initial risk. Other context comes from you or mapped columns.

Steps

01 Open a decision to inspect its result, recorded process and original executions. Add trade opens manual entry.

02 Choose quick answers for entry, exit and rules. Expand Add more detail for optional strategy, setup, notes and context, or Edit all trade details for every field.

03 Choose your answers, then Save review. Historical trades are optional. Closing keeps a resumable draft in this open workspace. Queue prompts and period reviews stay separate.

04 Choose your setup uses your saved entries and previous trade labels. Add setup or Add strategy needs only a name; Save and use returns to the review. Manage optional rules and screenshots in More → My strategies & setups.

Example

Illustrative: gross £50, signed costs -£2, initial risk £20 → net £48 and +2.40R. Initial risk is £20, not 1 for 1%.

Grouping

Inspect which broker executions belong to a decision and correct them when the evidence supports it.

When to use it

After a fills import, especially when the reconstruction is uncertain.

What you add

Choose a source trade. Select execution rows only if correcting their grouping; choose a target for move or merge.

What Compound FX does

Corrections recalculate the decision; original broker rows remain preserved. Preview shows the selected rows' totals, not a guarantee that the full correction is right.

Steps

01 Read the source rows and compare them with your broker history. A correct grouping needs no edit.

02 Open Correct this grouping to reveal the tools. Split selected creates a separate group; Move to target reassigns selected fills; Merge combines source and target groups.

03 Use Preview totals to inspect selected fills, apply a justified correction, then inspect the resulting groups. Undo last change is available after a change in this session.

Example

Two separate decisions were combined: select the complete opening and closing fills for the second decision, then split and verify both results.

Import

Bring your closed trades straight from MetaTrader into the right trading account.

When to use it

First setup, then when your recorded broker history needs updating.

What you add

Start with recent MT4 or MT5 trades from your phone. Use a computer report for a larger history. Only visible information can be read. Missing tickets, opening times and costs stay unknown. Screenshot results are shown before costs and are kept separate from verified net results.

What Compound FX does

MT4 closed trades and MT5 closed Positions are recognised without column mapping. Unchanged MetaTrader trades already saved are skipped; changed or conflicting tickets block the report. CSV still supports saved column mappings. No automatic account sync. The selected file and preview stay available while this workspace remains open. Screenshot trades use recognised visible fields; recognised source text is also saved for later checking. Repeat uploads are checked for overlaps. Matching is limited by the visible information; positions with identical visible details may need checking. A uniquely matching later broker report can complete an existing screenshot record.

Steps

01 Create/select the trading account. Match its currency and broker-server timezone to the history you are uploading.

02 Open MT4 on your Windows computer. Open Terminal, then Account History. Right-click inside the history and select All History. Right-click again and choose Save as Report. Save the HTML report in a folder you can find.

03 Open MT5 on your Windows computer. Open Toolbox, then History. Right-click inside the history and select All History. Right-click again and select Positions. Right-click again, open Report and choose the HTML option. Keep the resulting HTML file; Overview and strategy-tester reports are different.

04 In Compound FX, open Trades → Import trades, choose your trading account and upload that same .htm or .html file. Check the closed-trade count and net result, then confirm Import. No conversion or column mapping is needed. Unchanged trades already imported are skipped, so you can upload an updated All History report.

05 English-language MT4 closed-trade and MT5 closed-Positions HTML reports are supported. Open positions, deposits and withdrawals are not imported as trades. Partial MT5 positions wait until fully closed. Unsupported layouts or separate account charges are flagged before import. Limit: 10,000 closed trades / 5 MB. A smaller date range may be needed for large histories.

Import / continued

Continue with the same tool and account.

06 Other platform? CSV import is still available under Other platform / CSV. PDF and Excel files are not supported. For CSV, select Completed trades or Executions / fills and check column mapping. Keep every position's fills together. After importing, inspect one decision in Trades; fills may need a Grouping check.

07 No closed trades yet? Explore the example journal and keep your setup ready for later. You do not need to place a trade to try Compound FX.

08 Open compound-fx.com/import-guide. Choose screenshots for recent phone trades, or the computer-report walkthrough for a larger history. Computer handoff remains optional; the report file does not transfer with the email.

09 Screenshot your closed trades. MT4: History. MT5: History → Positions. Capture the full visible rows together.

10 Choose your account and upload. In Compound FX, open Import trades, select the destination trading account and choose up to five screenshots.

11 Save and start a review. Check the recognised rows, then save the details. Continue to your first review, or open your calendar to explore the trades that were saved.

12 Keep the instrument, buy/sell, size, entry and exit prices, closing date/time and profit visible. Only visible information can be read. Missing tickets, opening times and costs stay unknown. Screenshot results are shown before costs and are kept separate from verified net results. Check the recognised trades against your screenshots. Unclear or undated rows may need attention; you can continue with the trades that were saved.

Performance

Find where results came from and open the decisions behind them.

When to use it

Once completed trades have a close time and recorded result.

What you add

Choose a date period and account, then narrow by your recorded strategy, setup, instrument or session.

What Compound FX does

Metrics, calendar and comparisons use loaded, confirmed completed decisions and UTC final-close dates. Mixed currencies pause monetary totals. Missing risk is excluded from R. Available-data spans do not guarantee complete history.

Steps

01 Keep 7D, 30D and 90D for rolling periods. Open Date range for This month, Last month, This year (year to date), Last year or custom inclusive UTC start/end dates. All loaded means loaded history, not guaranteed all-time history.

02 Select account, strategy, instrument and other filters. They remain when dates change. Reset filters clears the whole selection and any comparison.

03 Use Performance calendar for daily net results and completed-decision counts. Weekly and monthly totals cover only the selected dates. Year overview and Select year to date show the months; select a month to change the date range or a day to inspect its decisions. On narrow screens, scroll the calendar sideways.

04 Expand Compare with another period for the previous equivalent period or custom dates. Month/year-to-date compares the equivalent elapsed calendar period, not a full previous month or year. Check exact dates, recorded coverage and sample size. Differences are descriptive, not proof of an edge.

05 Select a diagnostic category, observation or calendar day to narrow the decision table. Open a decision for costs and source evidence, then Open journal / complete review to add context.

Example

Average R is unavailable? Open a completed trade and enter its actual initial monetary risk. Do not guess it to fill a metric.

Reviews

Review your recorded week, keep a useful lesson and carry one personal focus forward.

When to use it

Open More → Reviews, then choose Weekly review or Monthly review.

What you add

Choose one focus; notes are optional. Save unfinished work as a draft. Review queue retains prompt actions. Daily and first-cycle reflections remain in Other reviews.

What Compound FX does

Weekly and monthly reviews prepare results from eligible recorded decisions in the selected account's timezone. Saving a draft does not complete a review. Complete the review after the period ends. Later imports never silently rewrite saved results: Update review creates a new version and keeps earlier results, focus and notes.

Steps

01 Check the account, week and latest import. An upload date does not prove that the full week is covered.

02 Use the guided reveal: Your record, Notice the evidence, Keep a lesson, Carry one focus. Show full briefing switches to the complete view of the same report and draft.

03 Use your current mission, choose a supported focus, write your own, continue the previous one or choose no change. Save draft during an open period; the completion date is shown. After the period ends, complete the review using the latest evidence. Updating a saved review keeps version history and does not award repeat XP. An independent or newer mission is preserved.

04 In Previous focus, mark I followed this focus only when you can report doing so, and record what you observed. Save follow-through stores that self-report separately from the original saved evidence. Profit increases never mark a focus achieved automatically.

05 Open My progress for your milestones and lesson collection. Keep this lesson bookmarks an owned saved trade; removing a bookmark leaves the trade and earned milestones intact.

06 A first completed weekly reflection earns its milestone even if there are no eligible trades. Earlier partial milestones remain earned. New drafts earn no review XP. Chapters and period XP require completed periods with eligible decisions. Reviews opened from Decision system return to the same section.

Example

Lesson: I exited two trades before my recorded exit condition. Commitment: check the exit rule before closing the next reviewed decision.

Files

Attach private screenshots to a selected decision.

When to use it

When a chart screenshot would explain an actual trade.

What you add

Select a trade and upload JPG, PNG or WebP, up to 8 MB.

What Compound FX does

The image remains linked to that trade and is available to its signed-in owner. Images are not interpreted into trading data.

Steps

01 Select the trade before uploading.

02 Use a screenshot showing the relevant entry, exit or management detail.

03 Keep reusable setup examples in Setup playbook instead.

Example

Attach the chart at exit to the actual EUR/USD trade; place your ideal setup example in the playbook.

Account & settings

Manage your login profile, trading accounts, sessions, subscription and private data.

When to use it

Before your first import, or when account details and preferences change.

What you add

A trading account is a journal workspace, not a broker connection. Give it a name, currency and source-history timezone. Starting balance is optional.

What Compound FX does

Records stay attached to their account. Starting balance does not import history or connect live equity. Billing is managed separately through Stripe.

Steps

01 Under Trading accounts, create a workspace for each broker account. Use the account's actual currency.

02 Match Account timezone to the exported timestamps (for example Europe/London when appropriate); do not assume your phone timezone matches the broker's.

03 Manage session rules below. Product guidance emails are optional. Use Manage billing for subscription changes; deleting journal data is a separate permanent action.

Example

Name: Demo GBP; broker: your broker; currency: GBP. Use a separate workspace for a USD account.

Help & support

Find instructions for every section and ask for help without exposing private records.

When to use it

Whenever a step or result is unclear.

What you add

Search this reference or send a private support request with the feature, error message and expected behaviour.

What Compound FX does

Support requests receive a reference and status. Trades and files are not automatically attached.

Steps

01 Search a tab name or question below and open its instructions.

02 Use the Quick Start Guide for the first-session sequence. The main tabs are Today, Trades, Performance and Progress. More opens weekly/monthly reviews and other tools. Import trades stays in the header and Trades tab; Account and Help have their own header controls.

03 For unresolved issues, use the support form. Never include passwords, card details, broker credentials or raw trading records.

Example

Import: I selected fills mode, but Quantity is unmapped. Which export column should I use?

Decision system · Overview

A summary of plans, review completion and recorded adherence.

When to use it

When choosing a process task.

What you add

Choose a task; these summary cards are not additional forms to complete.

What Compound FX does

Saved trade reviews and comparisons feed the summary. Today focuses on the next action; Performance focuses on financial outcomes.

Steps

01 If useful, define your plan or assess a trade. You can read Weekly review and monthly report without completing these optional tools.

02 Use the cards to open the relevant tool.

Example

No plan yet? Start with the rules you already use; you can refine them later.

Weekly review

Review your recorded week, keep a useful lesson and carry one personal focus forward.

When to use it

After updating the history for the account and week you want to understand.

What you add

Choose an account and week. Select or edit one focus, continue a previous focus, or choose no change. A written note is optional.

What Compound FX does

Compound prepares up to three supported strengths and concerns from saved records. Small samples and missing context stay explicit. A saved weekly review retains the original evidence; it does not complete trade reviews or queue prompts.

Steps

01 Check the account, week and latest import. An upload date does not prove that the full week is covered.

02 Use the guided reveal: Your record, Notice the evidence, Keep a lesson, Carry one focus. Show full briefing switches to the complete view of the same report and draft.

03 Use your current mission, choose a supported focus, write your own, continue the previous one or choose no change. Complete weekly review saves the original evidence and focus. A newly saved current week carries its focus onto Today; an older week does not replace a newer focus.

04 Open My progress for your milestones and lesson collection. Keep this lesson bookmarks an owned saved trade; removing a bookmark leaves the trade and earned milestones intact.

05 A first saved Weekly Review earns its milestone even if the period is empty or partial. Chapter weeks separately require a completed period with eligible recorded decisions. Reviews opened from Decision system return to that same section.

Example

A profitable decision can contain a recorded rule breach. The review shows both without claiming that the breach caused the result.

Trading plan

Record the rules shared across your trading activity.

When to use it

Define rules before assessing trades; revise when your process changes.

What you add

Optional depth. Plan name, entry and exit rules are required. Risk %, money limits, sessions and scaling rules are optional. Record actual rules, not hindsight explanations.

What Compound FX does

The plan is saved for reference and selection in comparisons. It does not place orders, enforce limits or automatically judge free-text rules.

Steps

01 Name the plan and describe observable entry and exit conditions.

02 Add applicable risk and management limits, then Save trading plan.

03 Define a setup or select the plan in Plan vs execution.

Example

Illustrative format: enter only after my recorded confirmation; exit on invalidation; risk limit recorded as a percentage. This is an example of documentation, not a trading recommendation.

Plan vs execution

Record your own assessment of entry, exit, risk, scaling and session adherence.

When to use it

After a recorded trade, when you can compare it with the intended rules.

What you add

Optional depth. Choose a trade, plan and optional setup. Supply the adherence decisions and an evidence note.

What Compound FX does

Saved assessments feed adherence summaries and deviation prompts. The software does not infer whether free-text rules were followed.

Steps

01 Choose the trade and the plan you intended to follow.

02 For each dimension choose Followed, Deviated, Unknown or Not applicable.

03 Add what supports the assessment and Save comparison. This is separate from the Save review action.

Example

Exit: Deviated, because the recorded exit happened before my written condition. Scaling: Not applicable when scaling was not part of this decision. Unknown means evidence is missing.

Monthly report

Read a calculated summary of reviewed trades, comparisons and repeated recorded behaviour.

When to use it

At month-end, alongside your written monthly review.

What you add

The report itself needs no form entry. Record context and assessments in the journal, then write a reflection in Reviews.

What Compound FX does

Saved records feed the current month's report. Print / save as PDF exports the report; Download report data provides its JSON summary.

Steps

01 Check the evidence and any limited-history message.

02 Write your monthly review and next focus.

03 Print a private copy when useful; check the print preview.

Example

A recurring label is a prompt to inspect the trades, not proof of a reliable pattern.

My strategies & setups

Your private collection of strategies, setups, optional rules and chart screenshots. A strategy is a broader approach; a setup is the pattern that triggers an entry.

When to use it

When you want to save your own trading approach or entry patterns for faster reviews.

What you add

Only a name is needed. Descriptions, entry rules, invalidation, management, mistakes, linked strategy or trading plan and setup screenshots are optional.

What Compound FX does

Your active saved names appear in trade reviews. Nothing is selected for a new review. Existing trade labels are retained when a saved entry is renamed or archived.

Steps

01 Open More → My strategies & setups. Choose Add setup or Add strategy and save a name.

02 During a trade review, use Choose your setup or Add setup → Save and use without leaving the review. A linked strategy is filled only when that strategy field is blank; you can change or clear it.

03 Add rules or a description through Edit. Add chart screenshots to a saved setup using Add chart screenshot: private JPG, PNG or WebP, up to 8 MB.

04 Choose saved entries for the trades where they apply. Select Save review to mark that trade reviewed; creating a setup alone does not review a trade.

05 The optional invitation after import can be skipped with Not now. You can always return through Tools. Archive removes an entry from saved choices and keeps past trade labels.

Example

Use your own names. Compound FX does not assign a shared Pullback, Breakout or Setup A strategy to customers.

Objectives

Keep user-supplied targets and loss limits alongside recorded account results.

When to use it

When you want to record an account target or constraint.

What you add

Optional depth. Select the account, name and type. Enter applicable monetary targets/limits and an optional deadline.

What Compound FX does

Target progress uses recorded account net P&L, including existing history. The displayed deadline does not reset the performance period. There is no live breach monitor, order blocking or guarantee of challenge completion.

Steps

01 Use the account's actual currency and the limits you want to record.

02 Save, then compare displayed progress with the history included in that account.

03 Verify provider rules and live exposure independently; imported history is not live equity.

Example

A target of £500 is compared with recorded account net, not the account balance or only trades since you created the objective.

Accounts & imports

A summary of each account's records and reusable CSV column mappings.

When to use it

To inspect account coverage and previously saved mappings.

What you add

Create accounts in Account & settings; upload history in Import.

What Compound FX does

Successful imports save a mapping for matching headers. Source records remain separated by trading account.

Steps

01 Check the account and recorded activity shown here.

02 Use Add trading account or Import history to make changes.

03 If a broker changes its columns, review the new mapping before importing.

Example

GBP and USD accounts remain separate. A saved mapping recognises columns; it does not convert currencies.

Need help?

Open Help & Support in Compound FX or email support@compound-fx.com. Tell us your MetaTrader version, report format and the error shown. Please do not email trading files, account passwords or payment information.

A MetaTrader report is a snapshot, not a live connection. Check account, currency, report timezone, date range and original costs before relying on a review. Missing risk or journal context is not invented by the importer.