

Setup guide

Everything you need to do, in order, to get ZeroTouch trading your Interactive Brokers account. Start step 1 today: IBKR takes about one business day to approve the new username.

Before you start

- An Interactive Brokers account with US options permissions approved.
- A Windows 10 or 11 computer that stays on during US market hours (9:30 am to 4:00 pm New York time).
- The IBKR Mobile app on your phone (to approve logins).
- Your ZeroTouch installation code (emailed to you once your payment clears).

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1 Create the bot role in IBKR

- Log in to the IBKR Client Portal with your main username.
- Go to Settings → Users & Access Rights → User Roles tab → Add (+).
- Role name: zerotouch (or any name you like).
- Permissions: check Trading (stocks and options) and, under Trading Platform, Market Data.
- Do not check withdrawals, deposits, transfers or account changes: the bot doesn't need them.
- Save the role.

The role limits what the bot's username can do: buy and sell, never move money.

2 Create the second username (the bot's)

- In Users & Access Rights → Users tab → Add (+).
- Enter a name, an email and a username, for example yourname-bot.
- Assign the zerotouch role you created in step 1 and confirm.

- IBKR emails the new user to finish registration (password, security questions and personal details). Complete it.

Approval of the new username usually takes about one business day. Meanwhile you can do steps 4 and 7.

Why a second username? IBKR allows one session per username. If the bot uses your main username, it disconnects every time you log in from your phone or the web. With its own username, the bot stays connected.

3 Activate the bot username and its market data

- Once IBKR approves it, log in to the Client Portal with the bot's username (not your main one).
- If asked about your market data subscriber status, answer Non-Professional (if that applies to you).
- Go to Settings → User Settings → Market Data Subscriptions → Configure (gear icon) → North America section, and subscribe to these two bundles:

Bundle	What for	Approx. cost
US Securities Snapshot and Futures Value Bundle (NP,L1)	Required base for the next bundle	USD 10/month (waived if monthly commissions reach USD 30)
US Equity and Options Add-On Streaming Bundle (NP)	Real-time stock (NYSE, AMEX, NASDAQ) and options (OPRA) quotes. This is what the bot uses	USD 4.50/month

- Confirm the subscription. If IBKR asks you to accept the Market Data API Acknowledgement, accept it. The confirmation should show a total of USD 14.50 per month.

(NP) means Non-Professional. When you confirm, IBKR may add other free packages on its own (for example IEX Depth of Book, mutual funds or European and Asian exchanges) marked Fee Waived: they cost nothing and you don't need to remove them.

Market data is subscribed per username: it must be active on the bot's username, not only on your main one.

The free packages that often come enabled (US Real-Time Non Consolidated Streaming Quotes, crypto, FX, bonds) are not enough: they don't include options. Without OPRA the bot can't see option prices and cannot buy.

IBKR sets these names and prices and may change them. If you don't find these exactly, look for the bundle that includes real-time US stocks and OPRA (US Options Exchanges).

4 Download and install IB Gateway

- Download IB Gateway (Stable version, Windows) from Interactive Brokers' official page: <https://www.interactivebrokers.com/en/trading/ibgateway-stable.php>

- Install it with the default options.

IB Gateway is IBKR's official program for automated connections. It is lighter than TWS, and ZeroTouch connects to it.

5 Configure IB Gateway

- Open IB Gateway, choose IB API and Live Trading, and log in with the bot's username. Approve the login in IBKR Mobile.
- Once in, go to Configure → Settings → API → Settings and set:

Option	Value
Read-Only API	Unchecked (if checked, the bot cannot trade)
Socket port	4001 (live account)
Allow connections from localhost only	Checked
Master API client ID	Empty

- In Configure → Settings → Lock and Exit choose Auto restart and a time outside market hours (for example 11:45 PM). IB Gateway then restarts every night and only asks you to approve the login once a week.
- Click OK to save.

To practice with a paper account, log in to Paper Trading and use port 4002.

6 Install ZeroTouch and activate it

- Download the program from the link in your email or from zerotouchbots.com/en/download, and install it.
- When you open it, the Activation screen appears: paste your installation code and click Activate.

The code is your license and works on one computer at a time. Keep it safe.

7 Connect ZeroTouch to your account

- In the Settings tab (in the Master, the Connection tab) fill in:

Field	What to enter
IB account	Your account number, for example U1234567
IB port	4001 (same as step 5)
Client ID	Keep the default. If you run two ZeroTouch programs on the same computer, give each a different number
Installation code	Already filled in when you activate

- Click Save and then Test connection: it should connect and show your account value.

- Check Start the bot automatically when the program opens.

8 Build your portfolios (baskets)

- HedgeFund (individual program): in Bot capital cap enter the capital you want it to trade. Leave Manual basket empty to use the automatic basket (the 5 largest Nasdaq-100 companies), or enter a single stock, for example NVDA.
- Momentum (individual program): Capital cap and Weekly percentage (0.05 = 5% of capital per week). Manual stocks empty = automatic basket of 18 tech stocks; or a single one, for example NVDA. In Options exit choose expiration (the one tested in the backtest) or Monday.
- Master: Portfolios tab → Add, once per portfolio. Example with USD 145,000 in three portfolios:

Name	Strategy	Stocks	Allocated capital	Cap
HF NVDA	HedgeFund	NVDA	35,000	0 (no cap)
MOM AMD	Momentum	AMD	55,000	0
MOM Basket	Momentum	(empty = automatic)	55,000	0

- Each portfolio trades with its own capital and cap, in the same account. Allocated capital comes from the account's cash.

If you're just starting, begin with one or two portfolios and small amounts, and add more once you see how it trades.

9 Start it and let it work

- Click Start. In the Log tab you'll see it connect and what each portfolio decides.
- Keep the computer and IB Gateway open during market hours. When it absolutely must be open, per bot, is in the site's FAQ.
- You get emails for every buy and sale, a weekly report, and reminders if the program isn't connected when it needs to trade.

Would you rather do it together?

With 2 hours of technical support we connect by remote session and set everything up with you: IB Gateway, connection, portfolios and first run. You can also get the full assisted onboarding.

Buy support hours: zerotouchbots.com/en/signup?producto=soporte

FAQ: zerotouchbots.com/en#preguntas

Support: soporte@zerotouchbots.com · zerotouchbots.com