1) Introduction:

Extension- Angel One Panel

Extension made by NeonRed.

Facilitates the market enthusiasts to connect and browse **NSE**(National Stock Exchange) on the go, through the portal provided by the **Angel One** broker.

Angel One Panel (v1.4)

Lets the investor skim through the live market charts, maintain a watchlist, get momentum alert on stocks, buy or sell assets and get access to a niche dashboard made particularly for market enthusiasts!

How this Extension can be useful to you?

- Use the **"Angel Mini Dashboard"** widget to get a personalized view of instant actions, updates and your extension's activities

- Get notified by **"@Market Eye"** Bot(s) and stay in tune with everything.

- Perform **"Add2Watchlist"** action(s) on your messages anytime.

- This extension is installed for the **"entire organization"**

Extension is up-to-date

[Take me to Cliq]

Note: You need to have an Angel One trading account(linked to DMAT) for usage of this extension.

2) Use case:

Uses the **Angel One** broking service to:
- Get the current price of a stock
- Get the current portfolio or holdings of the user
- Placing buy or sell orders
- Maintain a watchlist of stocks of the users choice
- Maintain a live order-book where the user can track the orders placed on the particular day

Note: These services are optimized for usage in the **equity sector of NSE** only because reportedly, majority users will have business with that sector only and will be able to skip making a choice between **NSE** and **BSE** every time he wants to use a service.

We can integrate **BSE** also in the future if the users feel the need.

3) Components used in Cliq:

1. Bot - **Market Eye**
   a. Welcome Handler
   b. Message Handler
   c. Context Handler
2. Widget - **Angel Mini Dashboard**
3. Message Action - **Add2Watchlist**
4. Function(s) - **appletFunction**

4) Components used in Catalyst:

1.Cache

S.NO	Variable Name	Variable Datatype	Variable Description
1.	**jwtToken**	Text (or) String	It contains the temporary auth token obtained after login.

2.Datastore
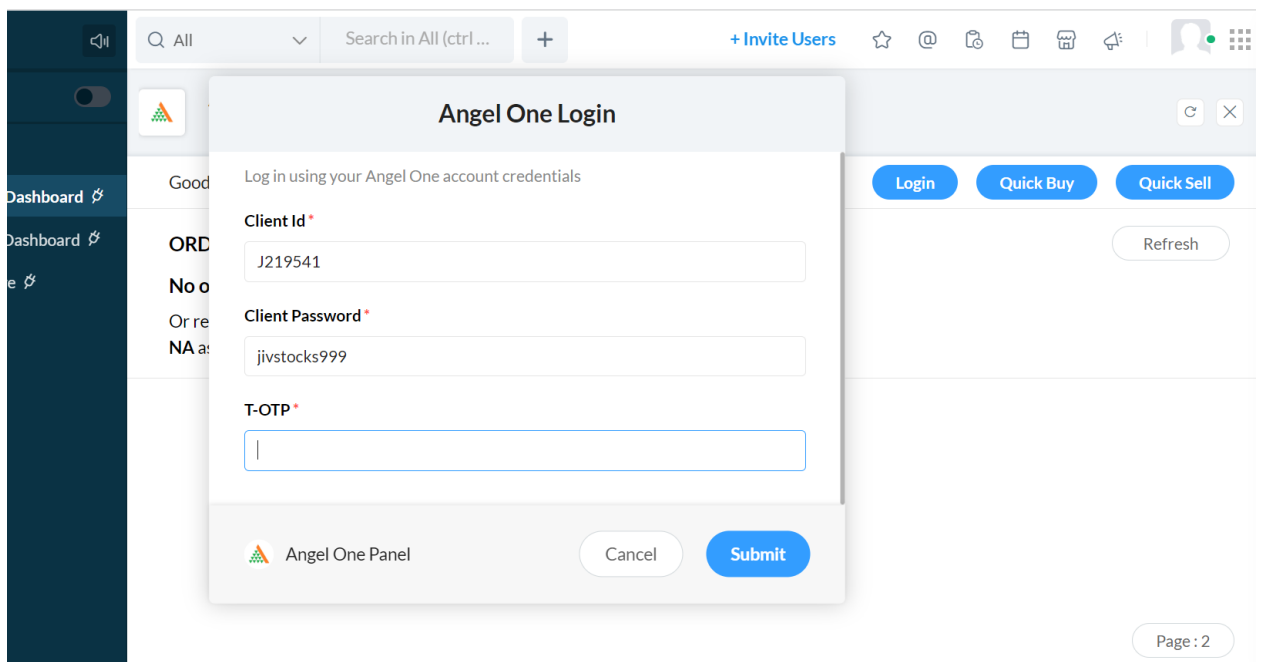
Table Name: **Watchlist**

S.NO.	Column Title (Parameters)	Mandatory ?	Datatype	Value
1.	**Name**	True	Text or String	Name of the stock added using the message action **(Add2Watchlist)** or by using the button **(Add to Watchlist)** in Widget.

5) How to setup and use Angel One Panel extension:

Step1: Install the **Angel One Panel** extension from the marketplace link.

Step2: Either go to **Angel Mini Dashboard** widget and click the login button to get the login form

Or

Open up the welcome message from **Market Eye** bot and input your Angel One credentials as asked by the bot serially.

Market Eye
Happy to help you

07:06 AM Hello Vivek. 🙂
Believe me, nothing will work if you dont login.
This extension has been optimized to work with **NSE exchange**, the biggest one in India.
Please enter your login details!

Enter your Client Id:

You

J219541

——— New Message ———

Market Eye

Enter your Client Password:

📎 jivstocks999

You

jivstocks999

Market Eye

Enter your T-OTP:

You

056783

——— New Message ———

Market Eye

Logged in!

Note: You can always type "login" and send it to the bot, to get this same login questionnaire. We did not use the connections feature of Zoho Cliq yet because Angel Ones OAuth documentation is very unclear and messy as of now(its redirect_url param is seemingly not working).

Step3: To check the price of a certain stock,

1. Send "price" or "details" to the bot.
2. The bot will ask you the stock name. Enter a stock name of your choice. If you miss the last few letters of the stock, the bot will throw you suggestions for what you might have meant. Choose one suggestion in that case.
3. Ta da! If that stock exists on the NSE, you get the price and the 24 hour change details of it.

Note: You can directly type in the full name of the stock and send it to get the price details directly instead of going through step 1 of this process.

Step4: To place a buy or sell order,
1. Send "buy" or "sell" to the bot.
2. Send in the stock name as asked by the bot.
3. Answer to the rest of the questions prompted by the bot which will decide the type of order and other factors.
4. The bot will give you a "SUCCESS" message if it tried to punch an order.

Step5: To get your portfolio details,
1. Write "portfolio" or "holdings" or "position" to the bot.
2. No other action required. The bot should output your accounts portfolio details.

Note: Send in "help" to the bot for it to describe its functionalities and commands.

Step6: To get your portfolio details in the widget,
1. Open **Angel Mini Dashboard** from the widgets section and the first tab(titled Portfolio) which loads, should show your portfolio details.

2. It should show "No open positions" if that's the case.

Step7: To use the watchlist,

1. Click the second tab of the widget, "Tatasteel" should be there in the list as default stock when you have not added anything in your watchlist.
2. To add a stock you can either:
   a. Click the "Add to Watchlist" button under the Watchlist tab. Enter the name of the stock in the form that appears.

   (or)

   b. You can use the message action **Add2Watchlist** on any of your text messages in Cliq and the first occurrence of a valid stock name would be recognized and then added to the watchlist.
3. Go to the watchlist tab and check the price details of the added stocks by clicking the reload button for whatever stock you want the details of.

Step8: To get the order-book,

1. Go to the "Live Orders" tab, the third tab of the widget.
2. Press refresh if you think you have placed an order and it is not showing up.
3. Scroll through the list, go to the next page(s) and thereby find your placed order.

What else we can add:
1. Another tab in the widget displaying the top moving stocks (live).
2. Alert module through cron to give price alerts to users.
3. BSE support if needed.

Thank you!