“Setup Guide-TwelevData/Other-Quote API's”.

No Broker Account is required for Bronze/Starter plans . Each user can set up one time and connect with their 3rd party Quote APIs.

TweleveData(supports in build)-Free Limited trail availab-Register here

Below on special request : our support team provides you a setup very quickly if you are looking for other API options below or any other which do supports Rest API’s.

Polygon.io)

Alpha Vantage

Finnhub Stock API

FCS API

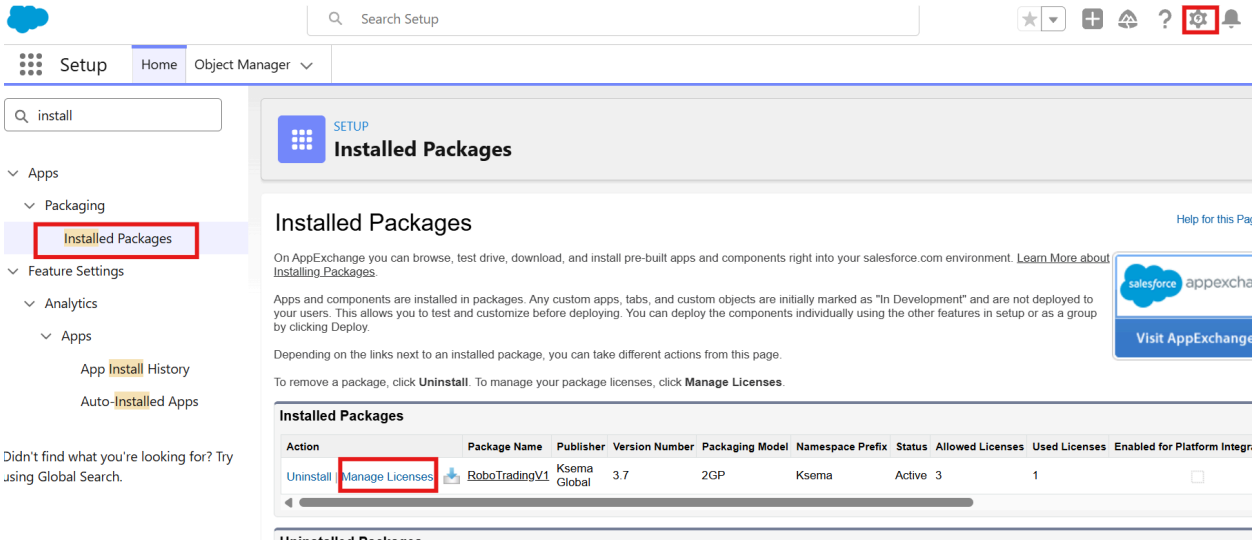
Many more Rest base API’s.

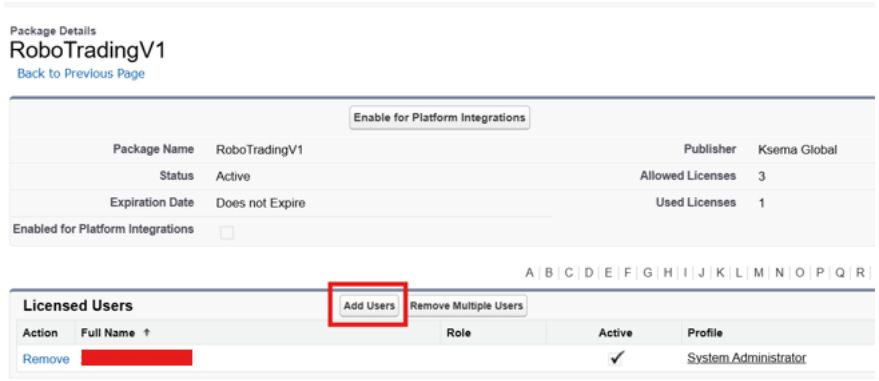
A. First create a salesforce login if not already and then Install Robo App in your salesforce instance.

Subscription Workflow Guide

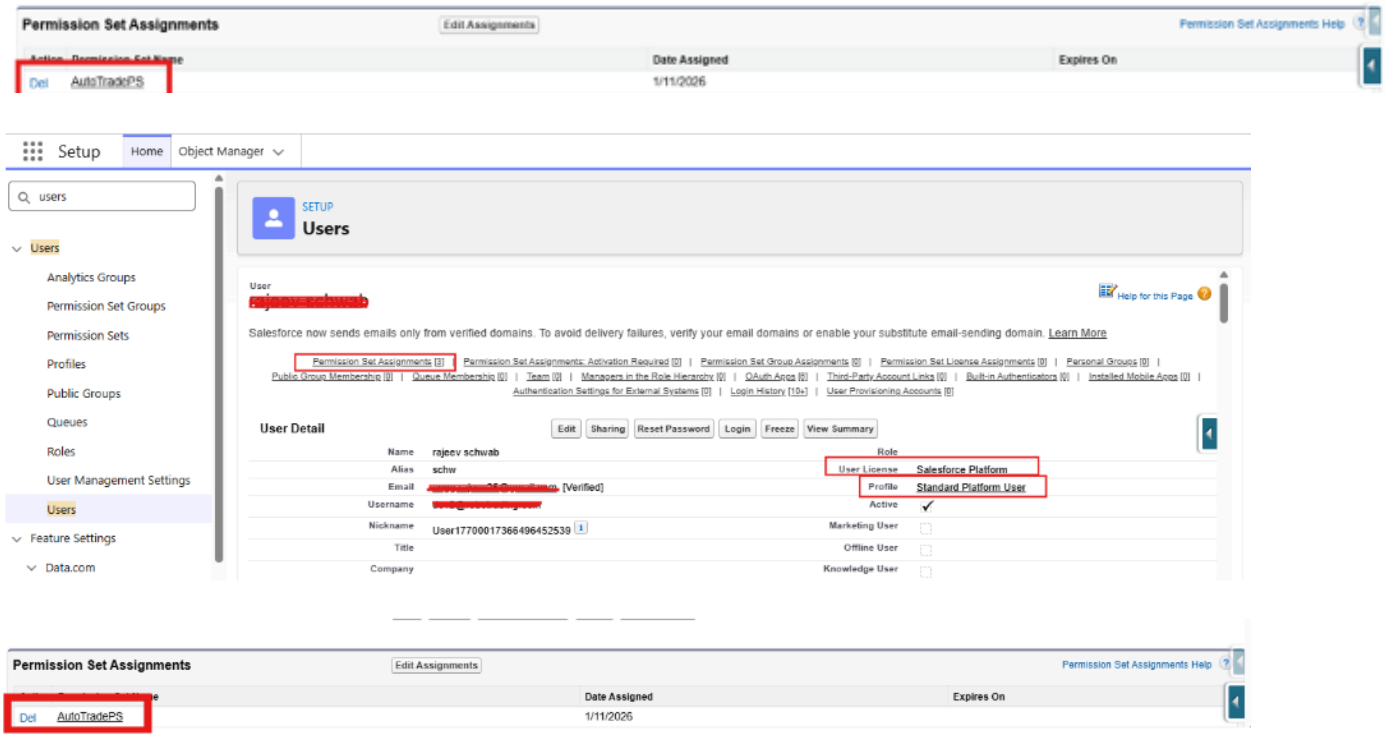
Installed App
1 Pre-requested Salesforce Org and having Enterprise Edition.Create Salesforce Org 2 Install Robo app in Salesforce org.Prod Org-App link or Sandbox Org-App link 3 Configure Robo App using installation steps document defined below, take our support in configuration via **Schedule a call with us for configuration** 4 Also supports Mobile App. Install Salesforce Mobile App: Apple App Store (iOS / iPhone / iPad) Google Play Store (Android) 5 Complete payment and subscribe before Trial expiry 6 Create a case below for payment confirmation (or email us) 7 New plan changes applied same/next business day by support team

B. Assign Manage package License to users who want to use Robo Trading App. Packages have default 10 License under free trial and once subscribed we will set based on the number of user plans. Add licence to users as per your plan.

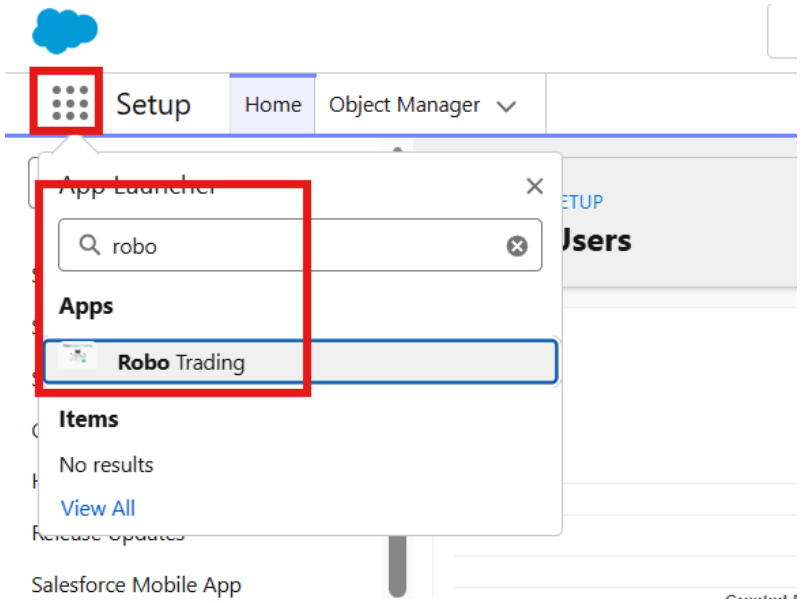




C. New User Setup:
   1. Minimum Licence is “Salesforce Platform”. The app will support all higher licence’s and you do not require to change Licence field for existing users. But to make your licence cost effective then use “Salesforce Platform”.
   2. Minimum Profile : Standard Platform User.The app will support all higher Profiles and you do not require to change Profile field.
   3. Time zone should be as per your Broker Time zone
   4. AutoTradePS should be Assigned

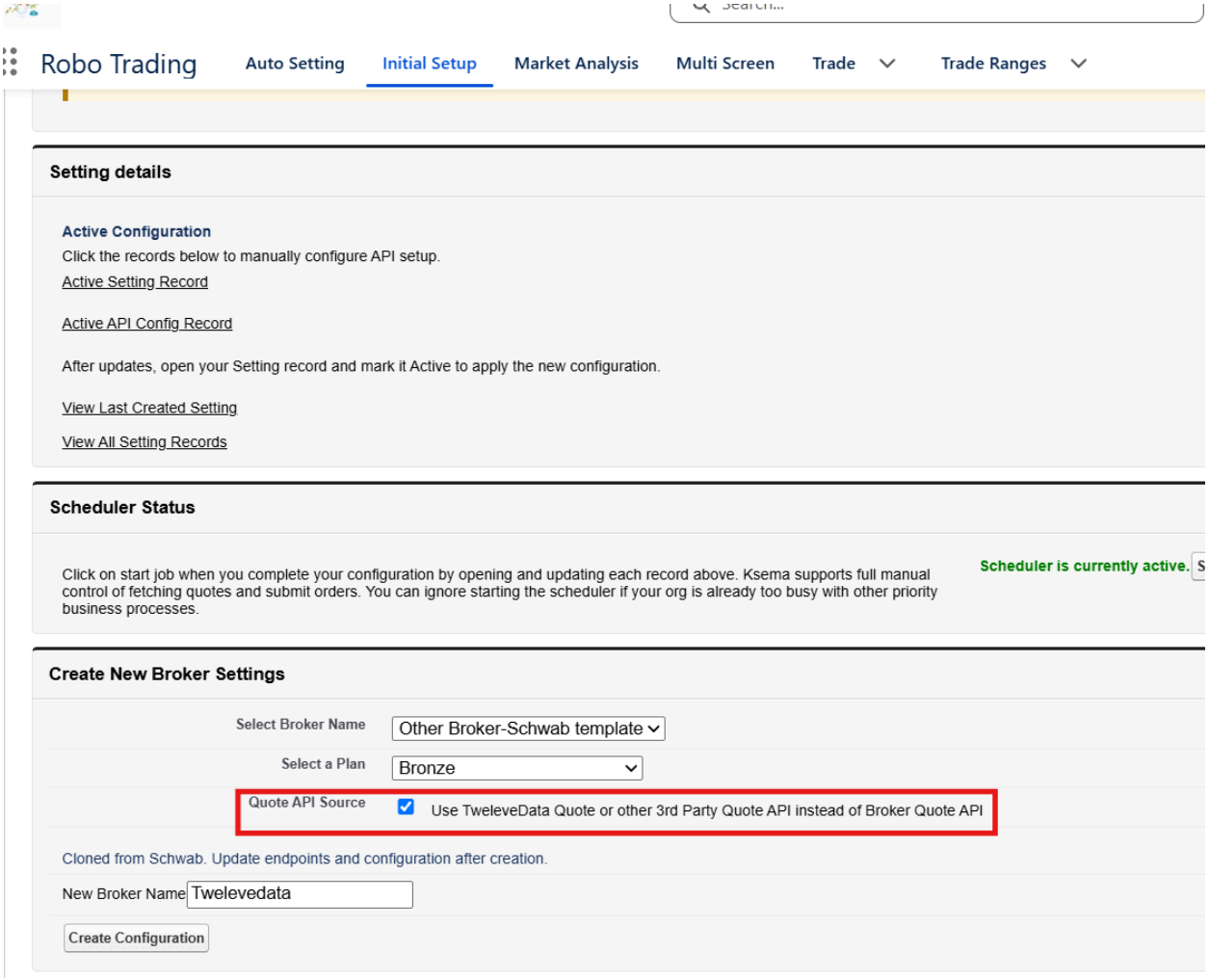

Permission Set Assignments
Edit Assignments
Permission Set Assignments Help
Date Assigned
Expires On
Del
AutoTradePS
1/11/2026
Setup
Home
Object Manager
users
Users
Analytics Groups
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
SETUP
Users
User
Help for this Page
Salesforce now sends emails only from verified domains. To avoid delivery failures, verify your email domains or enable your substitute email-sending domain. Learn More
Permission Set Assignments [3]
Permission Set Assignments: Activation Required [0]
Permission Set Group Assignments [0]
Permission Set License Assignments [0]
Personal Groups [0]
Public Group Membership [0]
Queue Membership [0]
Team [0]
Managers in the Role Hierarchy [0]
OAuth Apps [0]
Third-Party Account Links [0]
Built-in Authenticators [0]
Installed Mobile Apps [0]
Authentication Settings for External Systems [0]
Login History [10+]
User Provisioning Accounts [0]
User Detail
Edit
Sharing
Reset Password
Login
Freeze
View Summary
Name
rajeev schwab
Alias
schw
Email
[Verified]
Username
Nickname
User17700017366496452539
Title
Company
Role
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Permission Set Assignments
Edit Assignments
Permission Set Assignments Help
Date Assigned
Expires On
Del
AutoTradePS
1/11/2026

D. Launch App

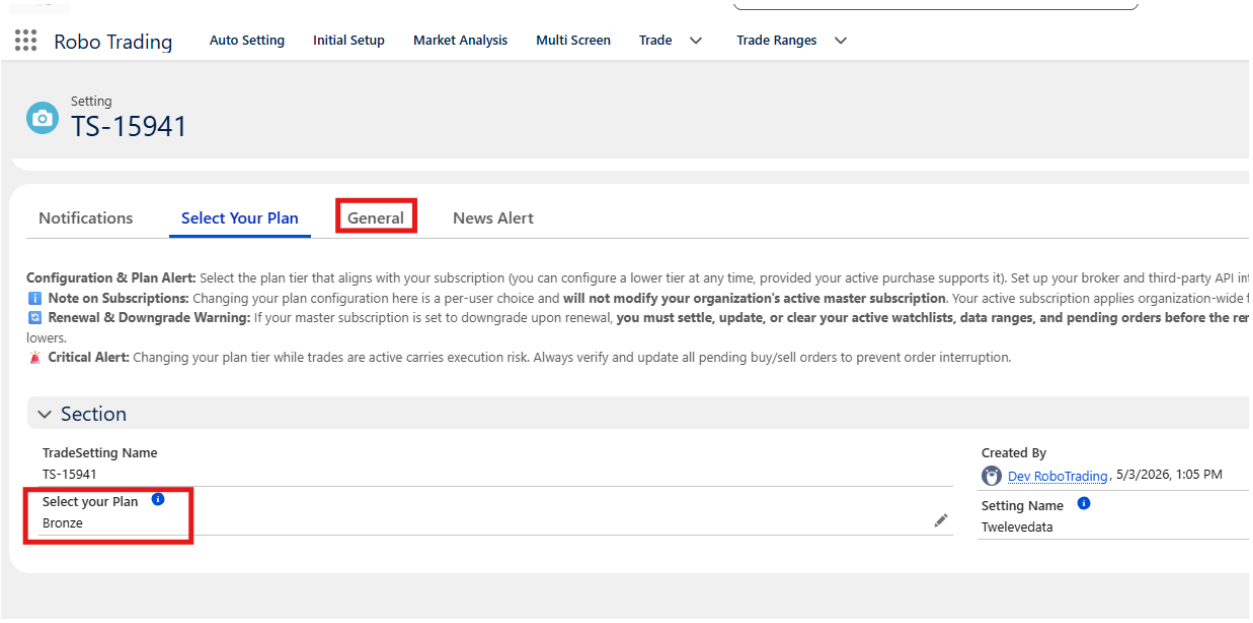

Setup
Home
Object Manager
App Launcher
robo
Apps
Robo Trading
Items
No results
View All
Salesforce Mobile App
ETUP
Users

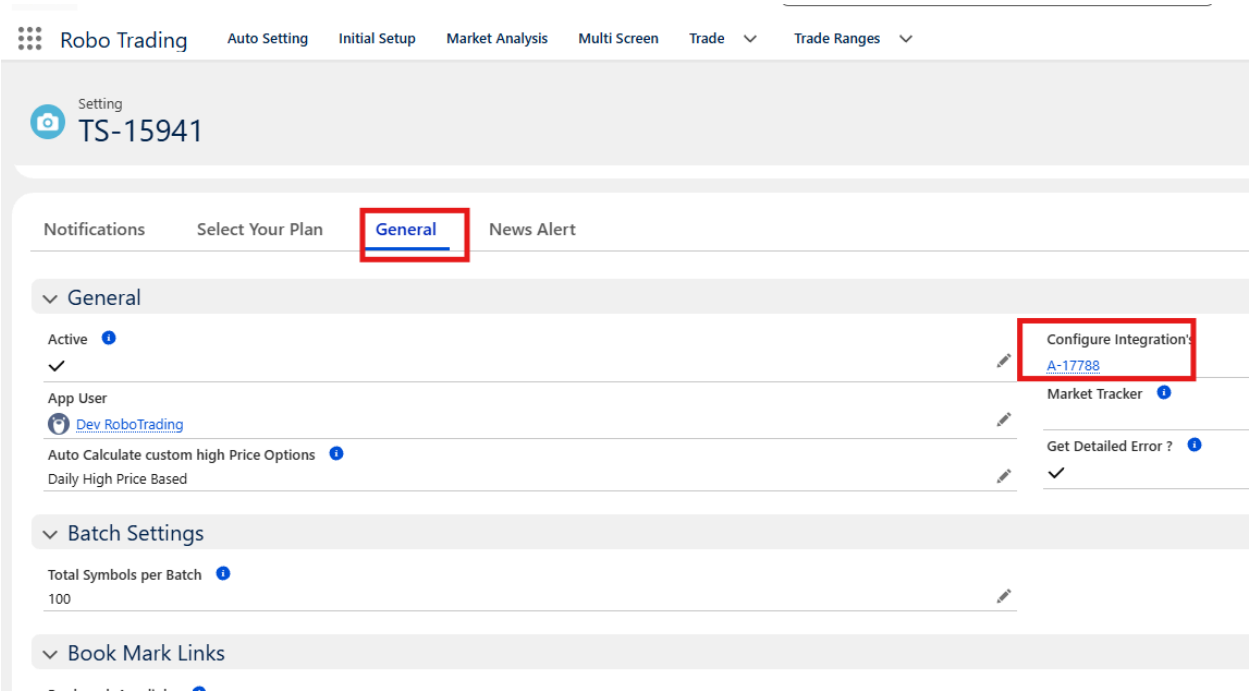
E. Initial Setup:

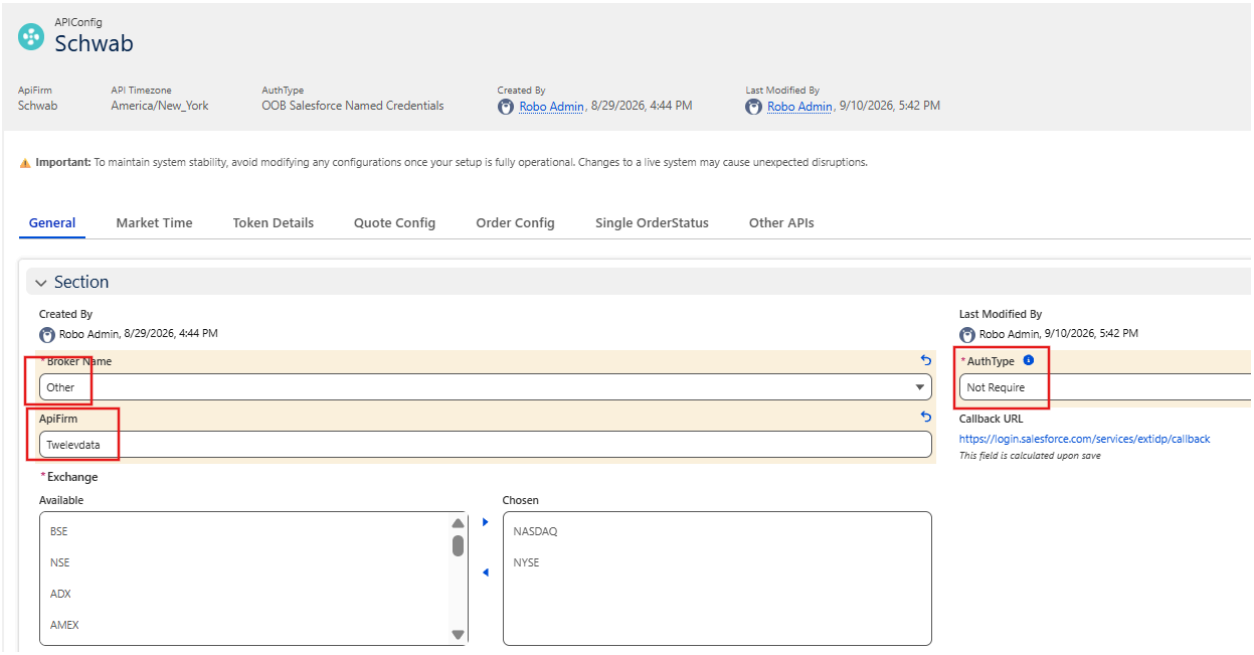
- Select Other(name you api) option in below selection. You can choose any other 3rd party API who supports Rest based integration and we give options to test before starting to use APP.
- Limited to 2 settings per user and users can switch API's as per their needs or update existing settings with new settings.
- Each setting will have a unique "API Config" record and API config will have Quote, Do not configure -Order Submit, Order Status and "Get Account No" SubAPIConfig records and leave as it.



F. Open newly created Setting record click on Broker, Select Bronze Plan and configure API integration.

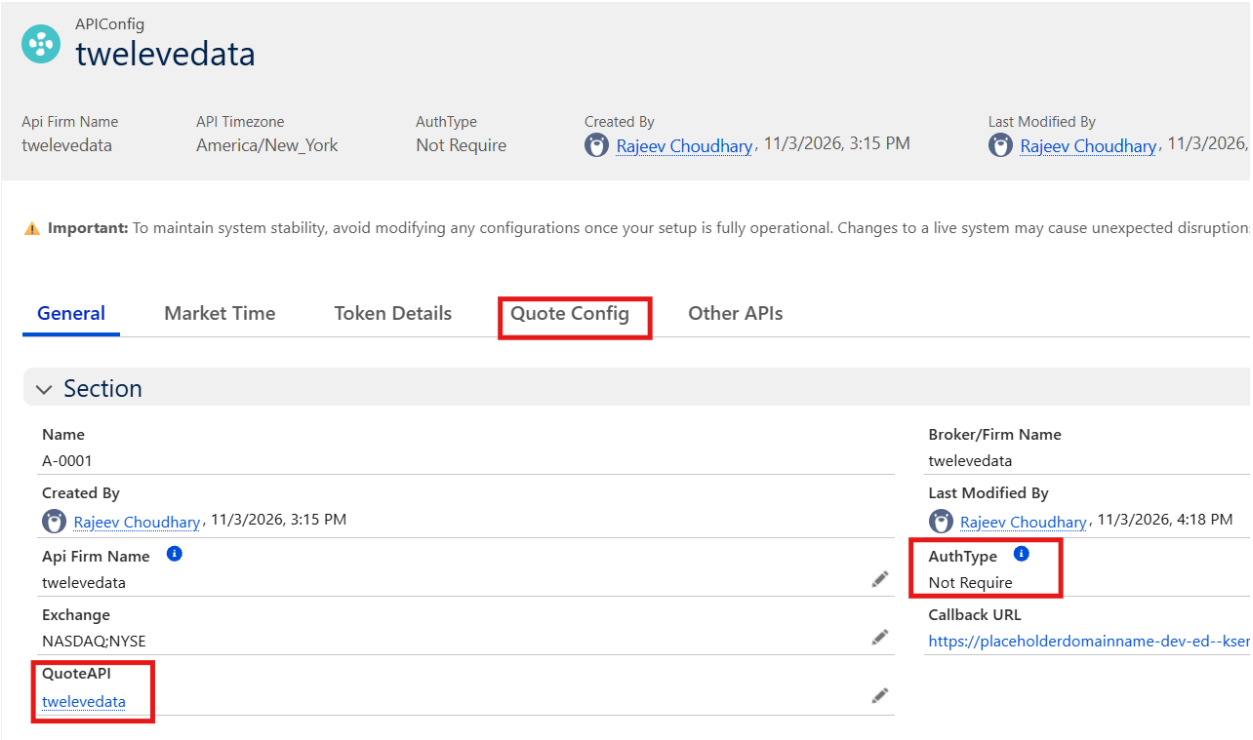




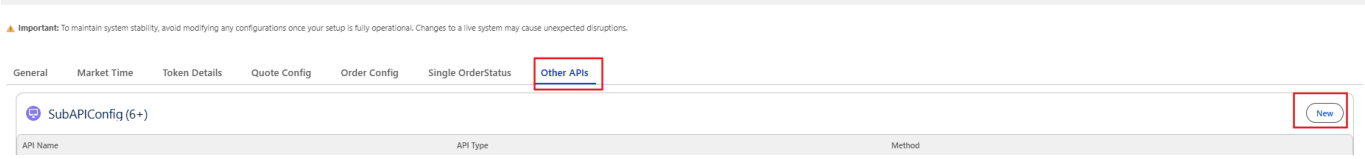


- Choose Authtype = Not Require
- Register in twelve data or any third party api and get Key. Key is enough to fetch data. Register key as per below

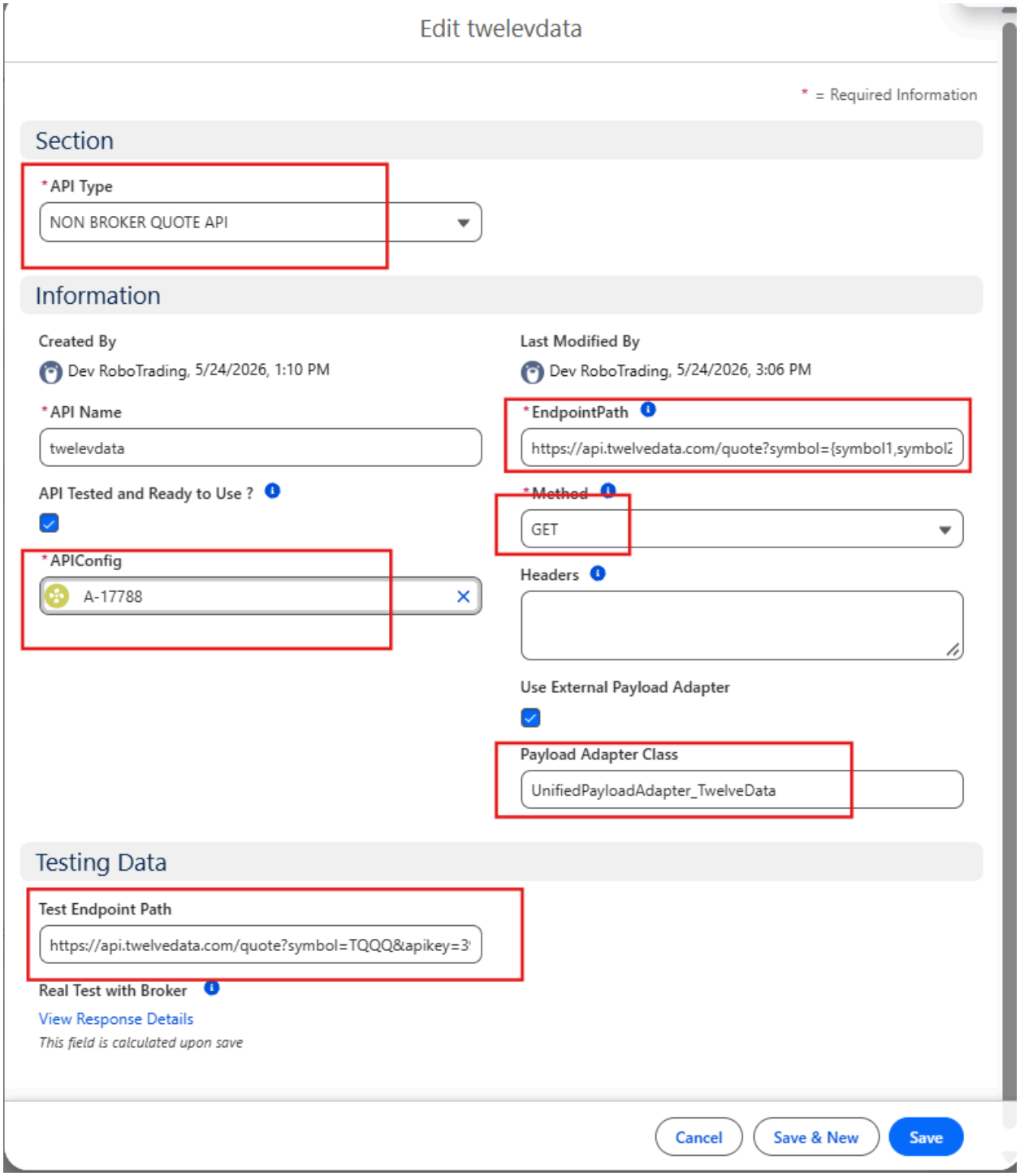
- Our System must already create a record with name “TwelveDataQuoteAPI” and linked to APIConfig record

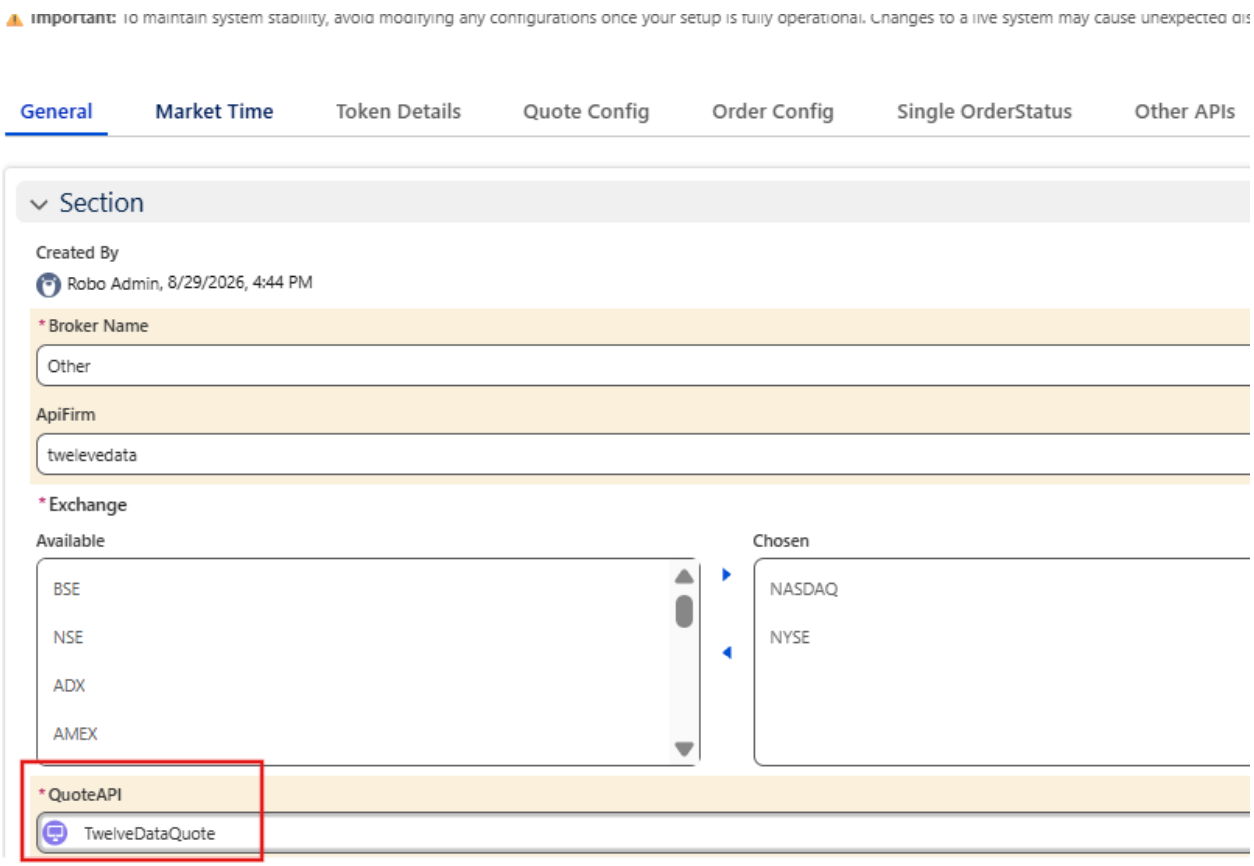


- If TwelveDataAPI is not available then create a new record as per below, link to your broker -apiconfig record.

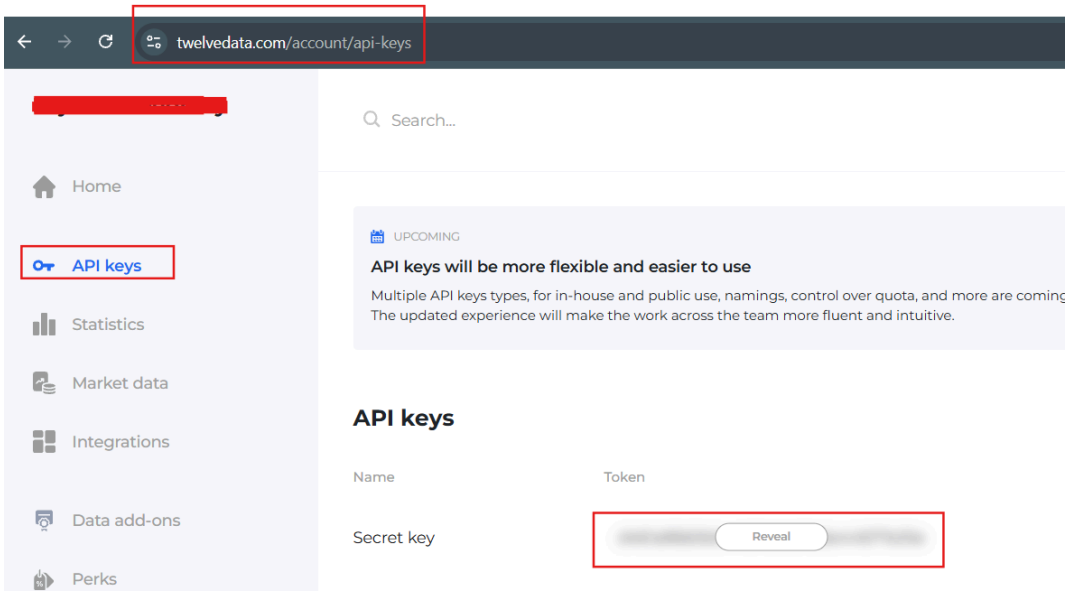


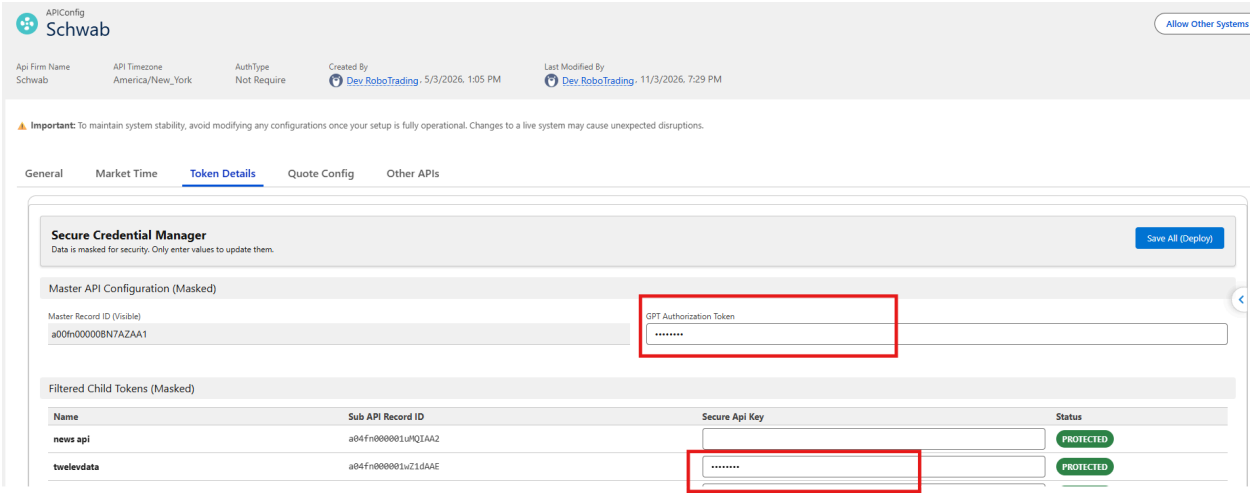
- **For Non broker Quote API:** we are supporting twelevedata in built and twelevedata allows limited quote data for testing in free trail , add full path like **https://api.twelvedata.com/quote?symbol={symbol1,symbol2}&apikey={key}&prepost=true** Curly braces define formatting about how end system supports and our system dynamically adds symbols while fetching quotes data . **{key}** is a special format and fixed to read key and replace securely. You can add key directly also for one time testing purpose.
- For Twelevedata quote , select **Use External Payload Adapter=true** , payload adapter class: **UnifiedPayloadAdapter_TwelveData**
- **Use External Payload Adapter** class is required when we are not supporting your Broker and needs a custom class for transformation of other Quote API's. Please contact our support team for the same.


Edit twelevdata
* = Required Information
Section
*API Type
NON BROKER QUOTE API
Information
Created By
Dev RoboTrading, 5/24/2026, 1:10 PM
Last Modified By
Dev RoboTrading, 5/24/2026, 3:06 PM
*API Name
twelevdata
*EndpointPath
https://api.twelvedata.com/quote?symbol={symbol1,symbol2
API Tested and Ready to Use ?
*Method
GET
*APIConfig
A-17788
Headers
Use External Payload Adapter
Payload Adapter Class
UnifiedPayloadAdapter_TwelveData
Testing Data
Test Endpoint Path
https://api.twelvedata.com/quote?symbol=TQQQ&apikey=3
Real Test with Broker
View Response Details
This field is calculated upon save
Cancel
Save & New
Save



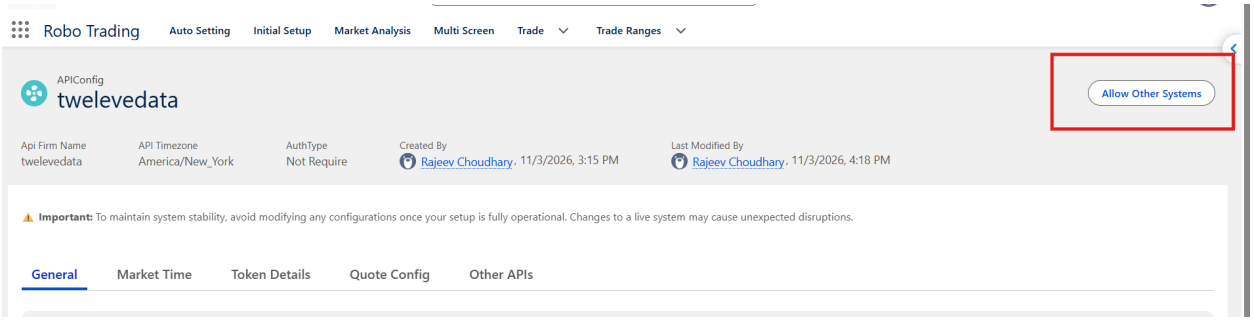
- Similarly you can configure any custom Quote API(a new Adapter class is required for a new custom API-contact support team if you want a different Quote API) .
- For Market data analysis(or for Starter plan) you can configure any new News and Stock API's under the Other API tab .

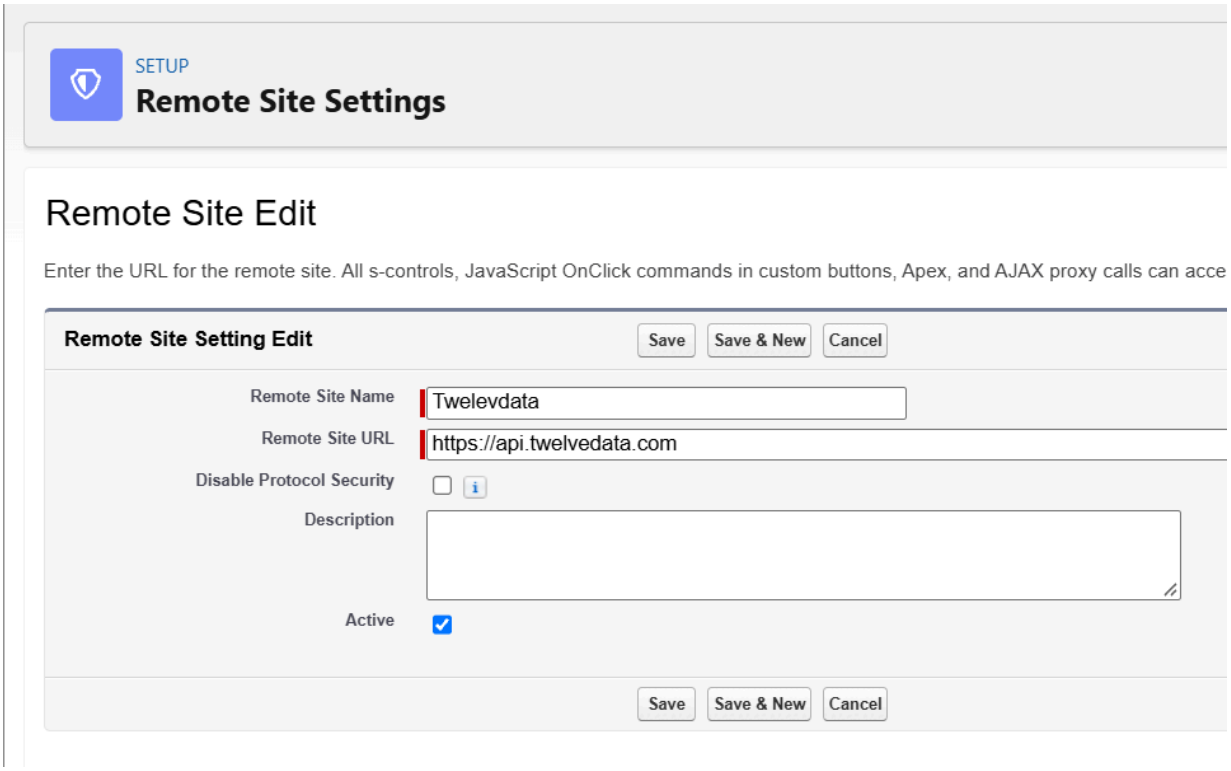
- Register in Twelevdata(https://twelvedata.com/) and get a free API key and store here. 



Also enter ChatGPT Token for Market and News analysis process.

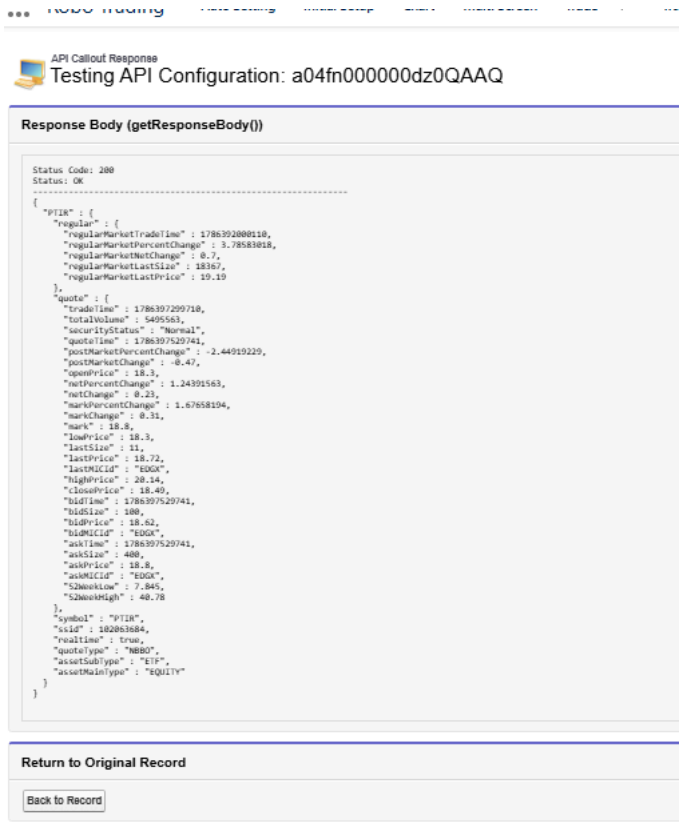
G. Allow Integration: Salesforce requires you to add any new external system in remote site settings.



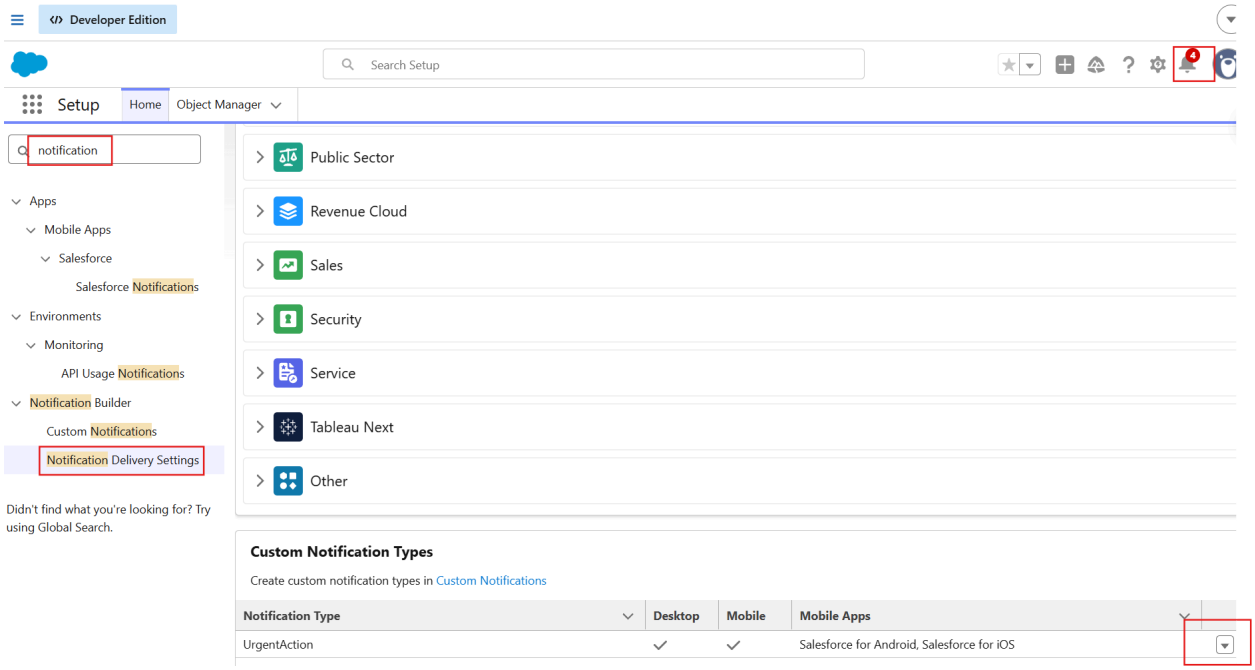


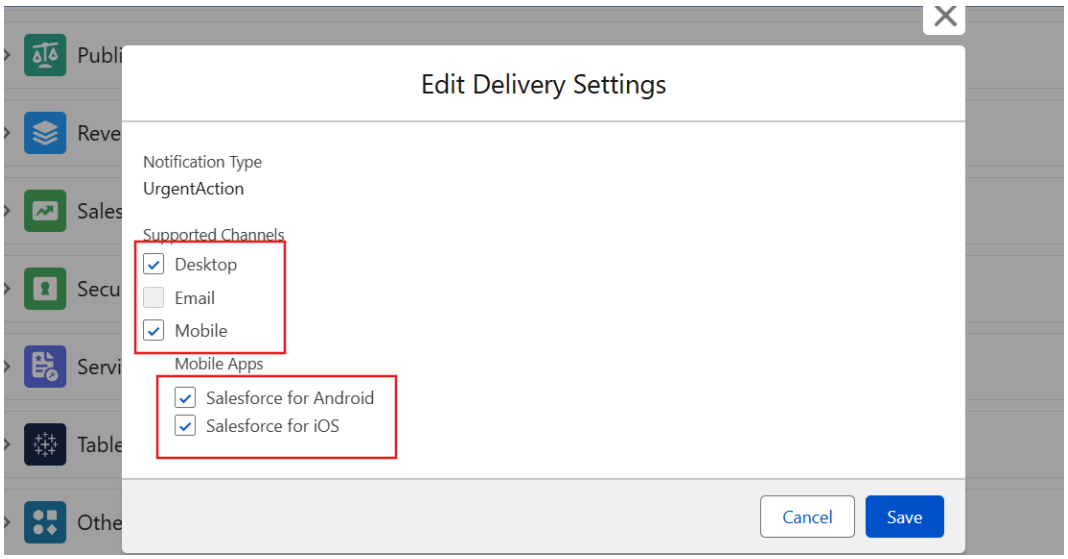
H. After saving, go to the Quote Config tab and test API results .

Test Quote API: check if Quote api is up and running

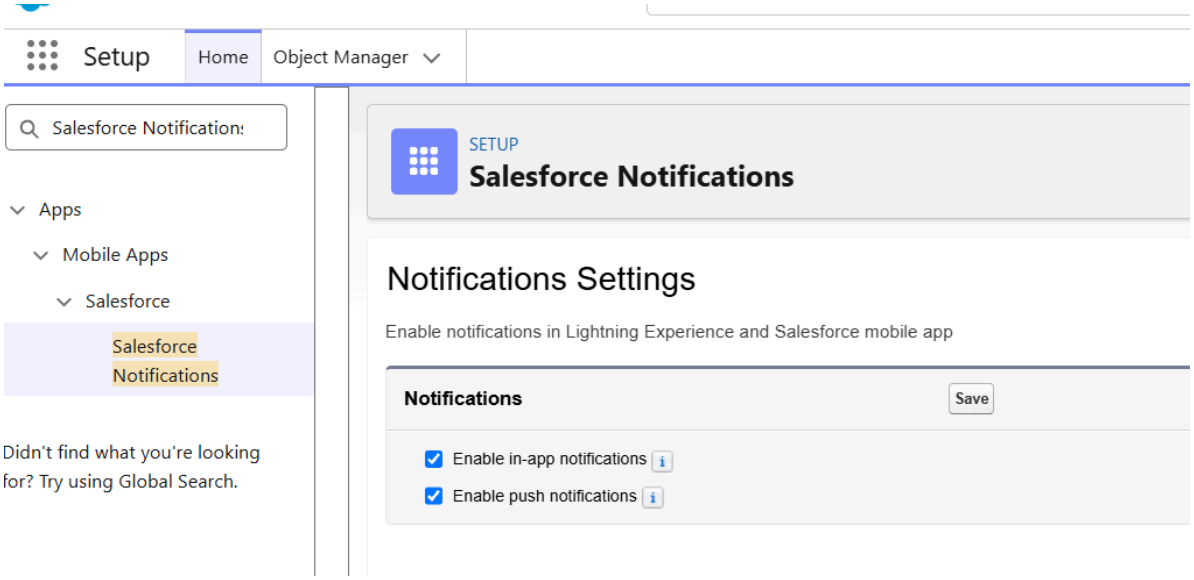


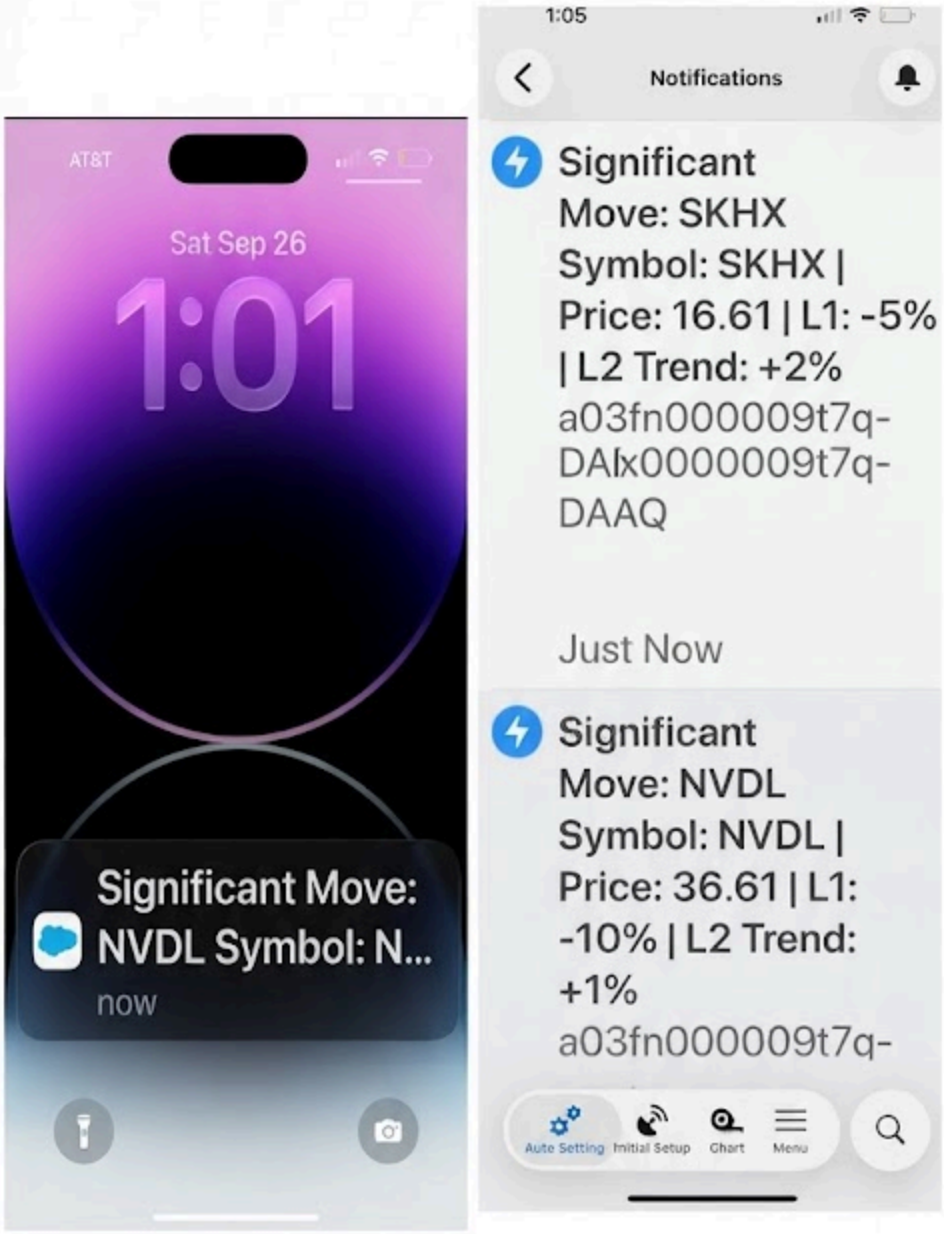
I. Mobile screen notifications : by default it is enabled but make sure below settings enabled.





Based on you price alert configuration later ，you will get App notification in you mobile screen like below


Setup
Home
Object Manager
Salesforce Notification
Apps
Mobile Apps
Salesforce
Salesforce Notifications
Didn't find what you're looking for? Try using Global Search.
SETUP
Salesforce Notifications
Notifications Settings
Enable notifications in Lightning Experience and Salesforce mobile app
Notifications
Save
Enable in-app notifications
Enable push notifications


AT&T
Sat Sep 26
1:01
Significant Move: NVDL Symbol: N...
now
1:05
Notifications
Significant Move: SKHX Symbol: SKHX | Price: 16.61 | L1: -5% | L2 Trend: +2%
a03fn000009t7q-DAIx0000009t7q-DAAQ
Just Now
Significant Move: NVDL Symbol: NVDL | Price: 36.61 | L1: -10% | L2 Trend: +1%
a03fn000009t7q-
Auto Setting
Initial Setup
Chart
Menu

J. Once configured then Create an actual Trade(symbol) entry and see if data is pulling from the broker - refer User Guide & Training Manual