https://antara.way2wealth.com
Help File for Antara Web 1.0.0

Contents

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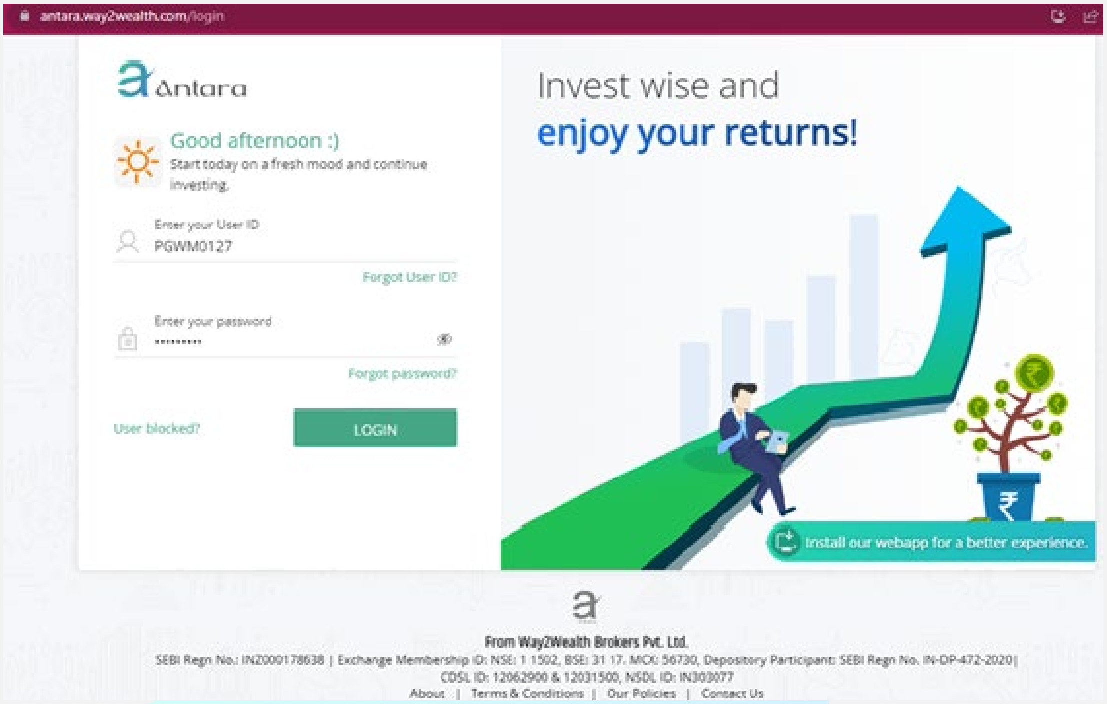
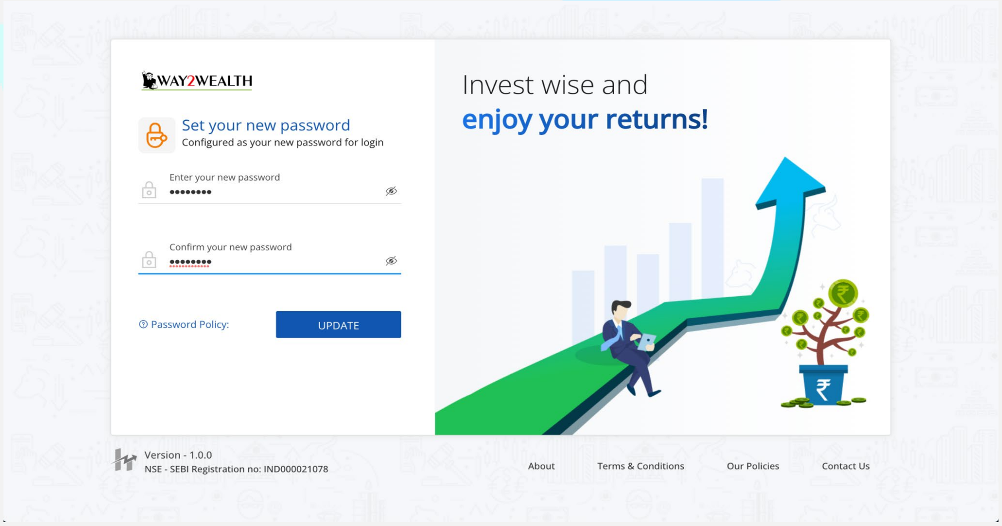
1. Login

New User



- New user receives a User ID and password on his/her registered email account.
- User logs in with provided credentials to https://antara.way2wealth.com website.
- On Entering the credentials OTP Authorisation is initiated. OTP is sent to the user on a registered mobile number and email address.
- During the first login process a new password is asked on successful login. Here the user sets a new password.



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Normal Login

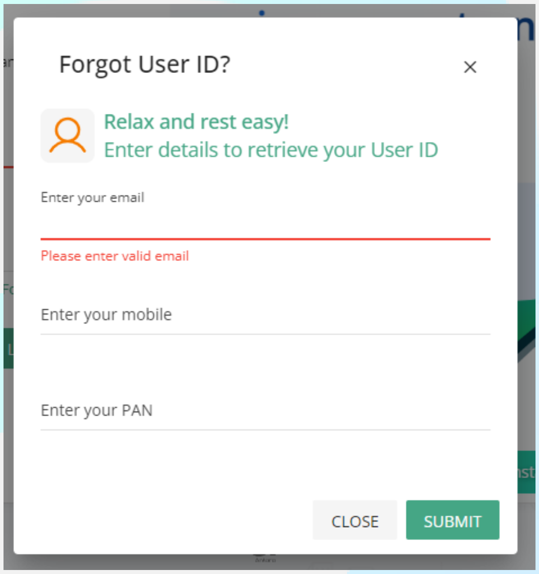
- After the initial login setup users can login with the valid User ID and New Password.
- OTP Authorisation is required for every Login.

Invalid Login Attempts

- When a user enters invalid credentials, the application gives an error message and restricts login.
- When a user enters invalid OTP, the application gives an error message and restricts login.

Forgot User ID

- In case a user forgets User ID, he/she can retrieve it again by entering registered email address, mobile number and PAN number. An email is sent with the User ID associated with the user.



Forgot Password

- Users can initiate the password reset process by providing User ID, Email Address, Mobile Number and PAN Number.
- After providing valid details the user receives an OTP on registered email address and mobile number.
- Now the user sets a new password.

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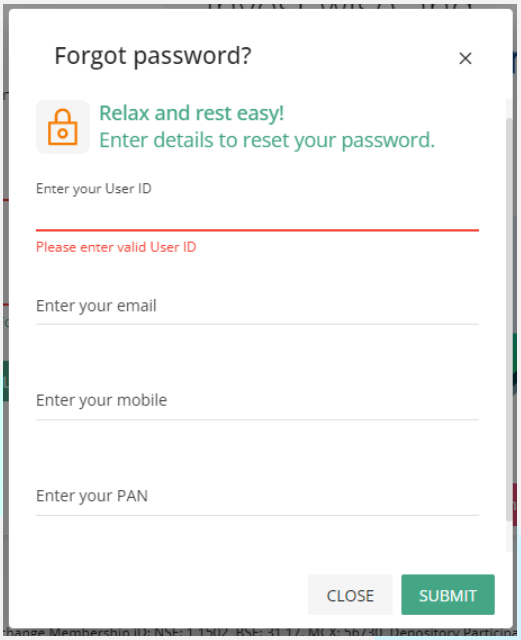
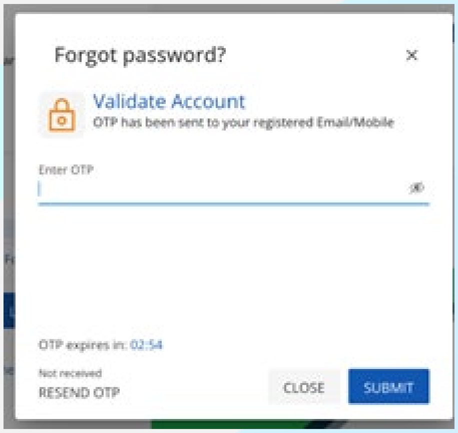
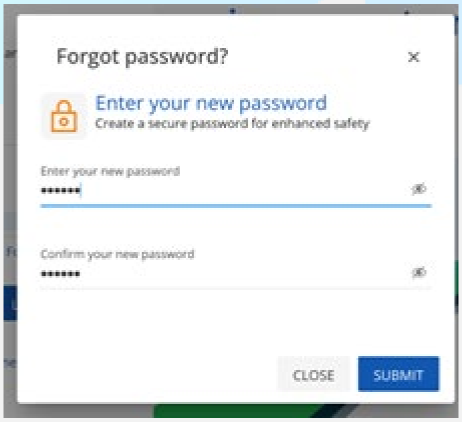
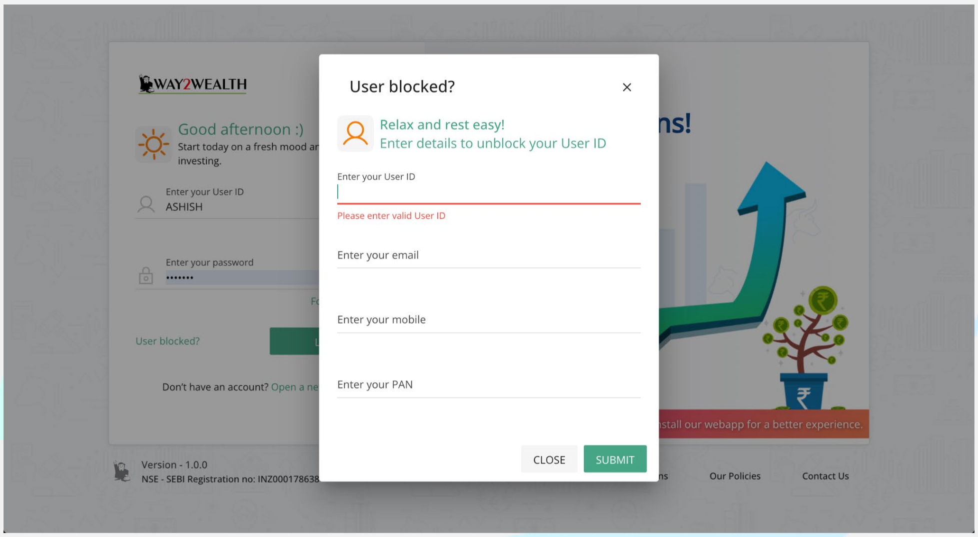

Forgot password?
Relax and rest easy!
Enter details to reset your password.
Enter your User ID
Please enter valid User ID
Enter your email
Enter your mobile
Enter your PAN
CLOSE
SUBMIT


Forgot password?
Validate Account
OTP has been sent to your registered Email/Mobile
Enter OTP
OTP expires in: 02:54
Not received
RESEND OTP
CLOSE
SUBMIT


Forgot password?
Enter your new password
Create a secure password for enhanced safety
Enter your new password
Confirm your new password
CLOSE
SUBMIT

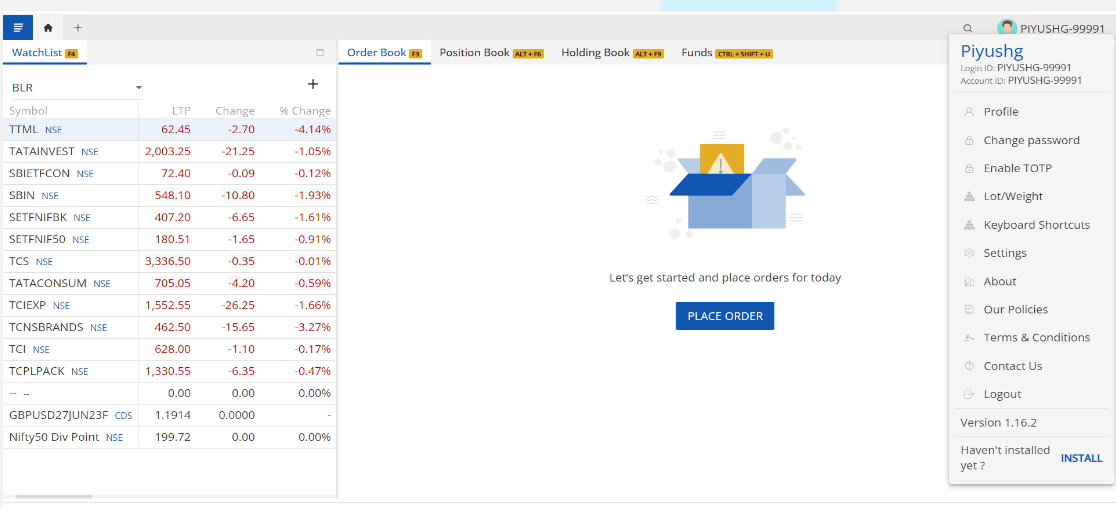
Unblock User

- After three consecutive invalid login attempts, the user account gets blocked.
- To unblock user account User ID, Email Address, Mobile Number and PAN Number should be provided.
- If provided details are valid, the user account is unblocked.



Change Password

- After login, users can change their password.
- Enter old password and then new password to change the current password.



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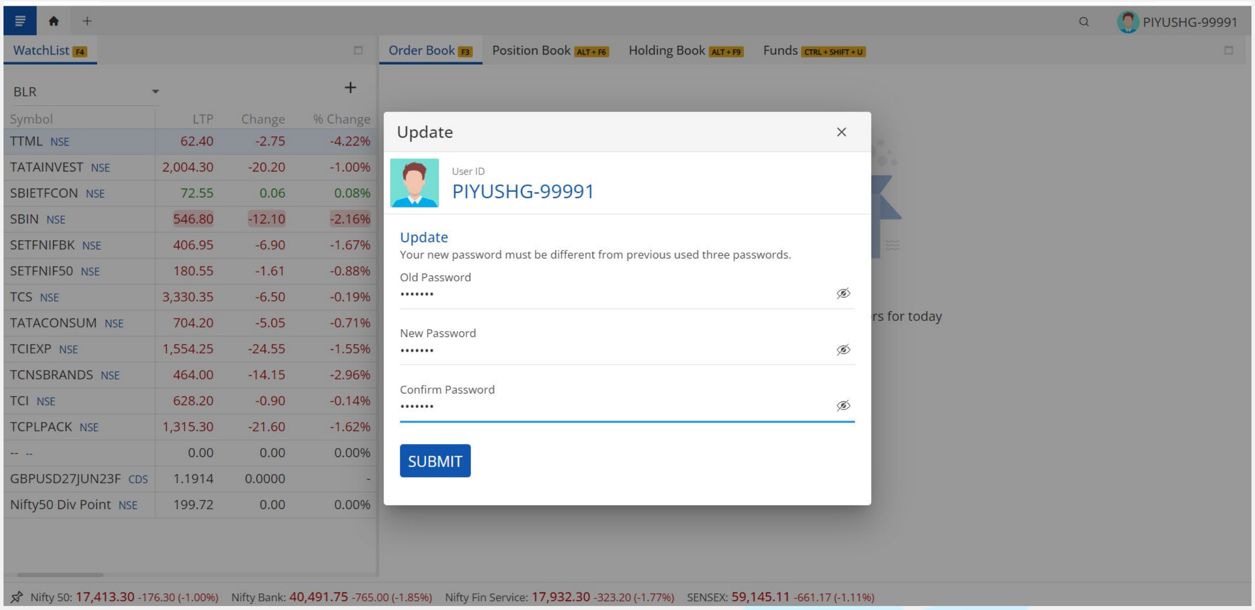
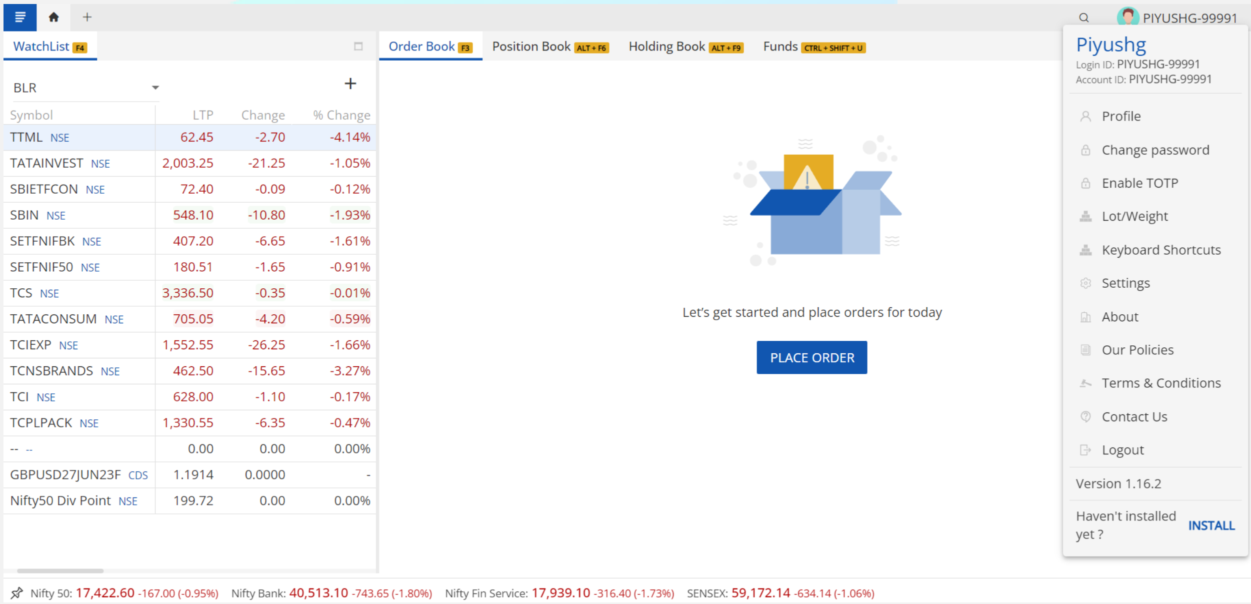
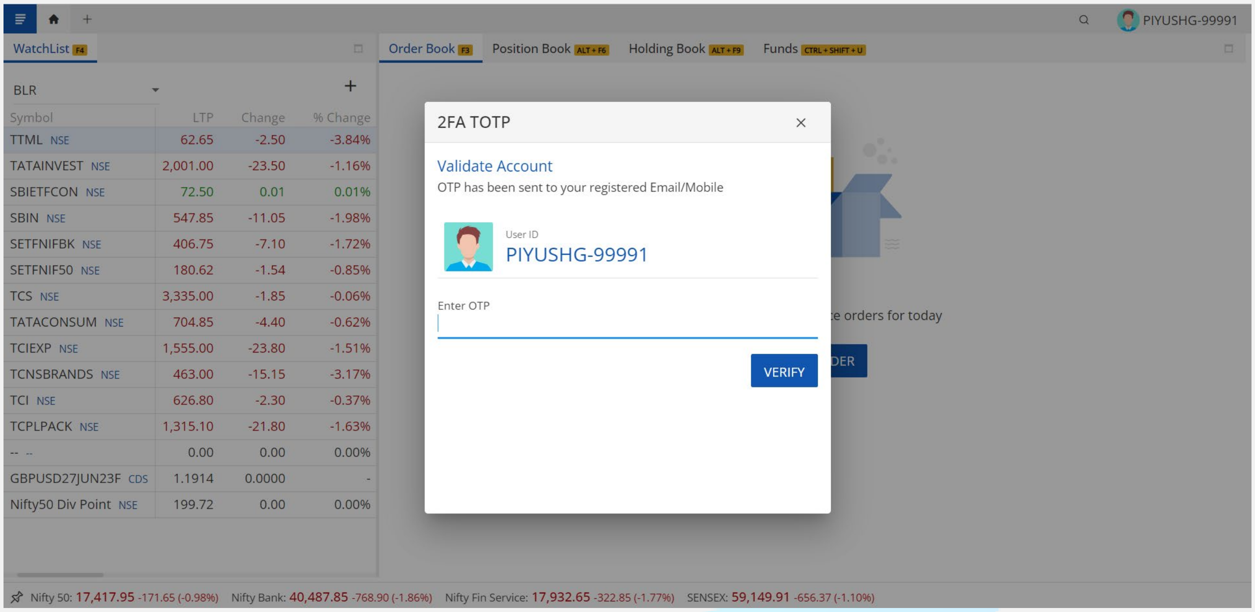


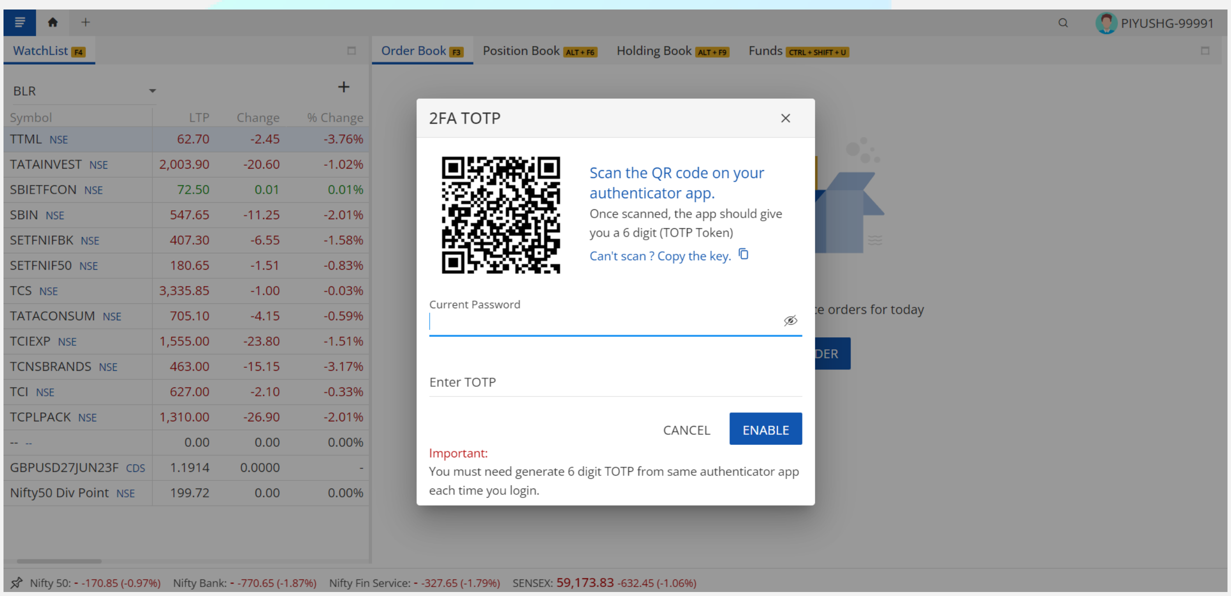
Enable TOTP



Time Based OTP can be enabled after Login.

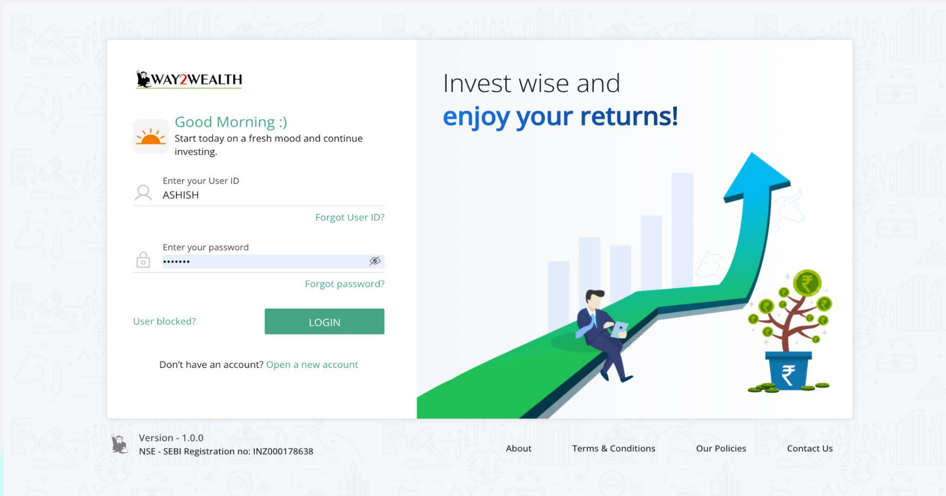


To enable 2FA TOTP user has to enter OTP and verify.



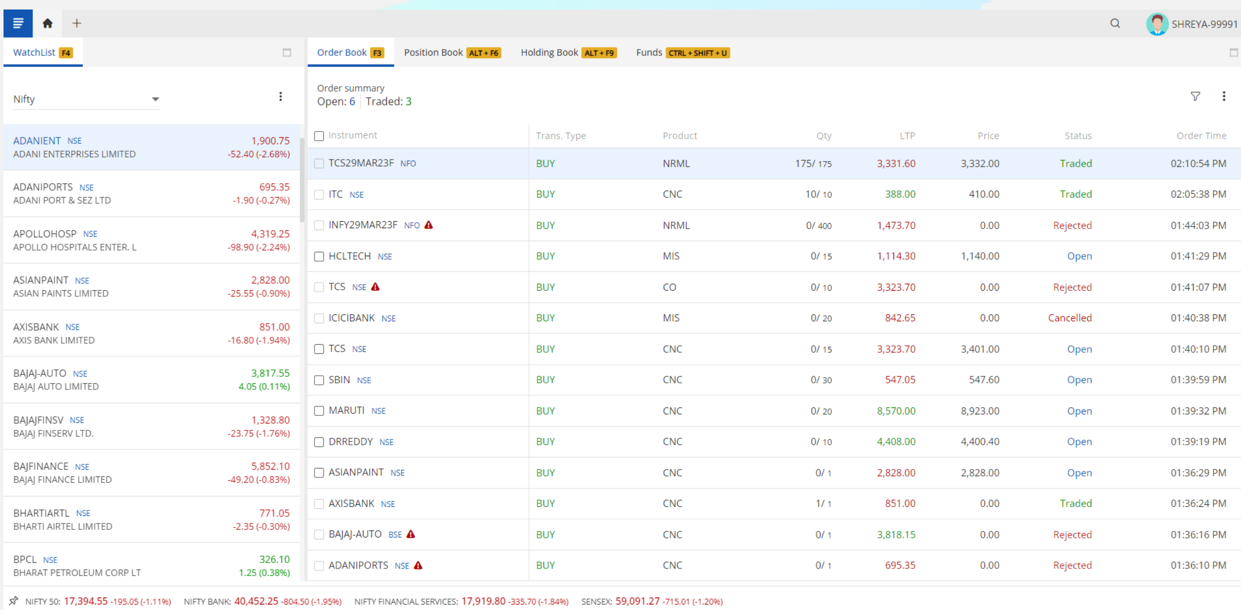
User can scan the QR code on a downloaded authenticator app and use the 6 digit TOTP token and existing password to enable TOTP Login.

Login with TOTP

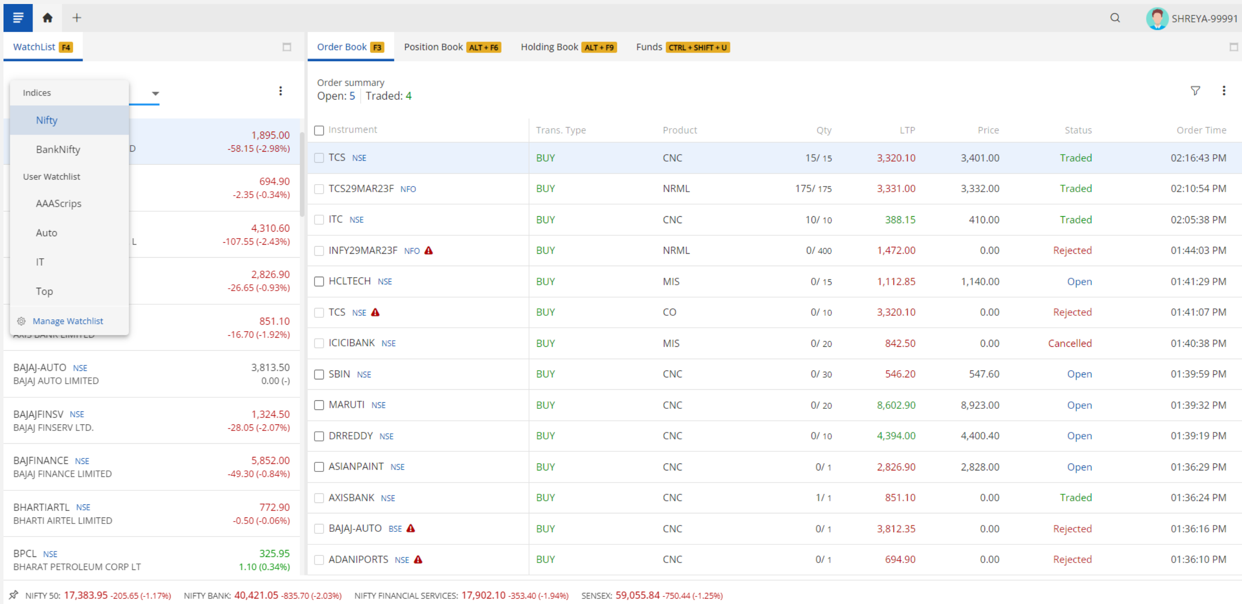


- Once TOTP is enabled User can Login with User Id and Password.
- The user can enter TOTP for login

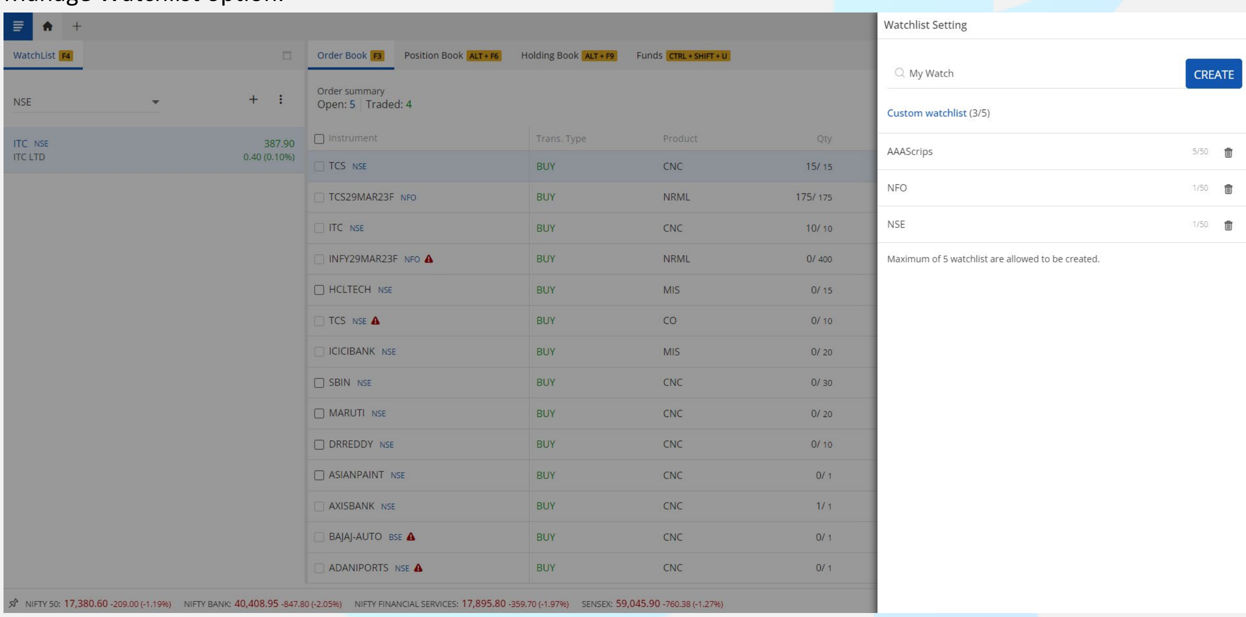
2. Watchlist



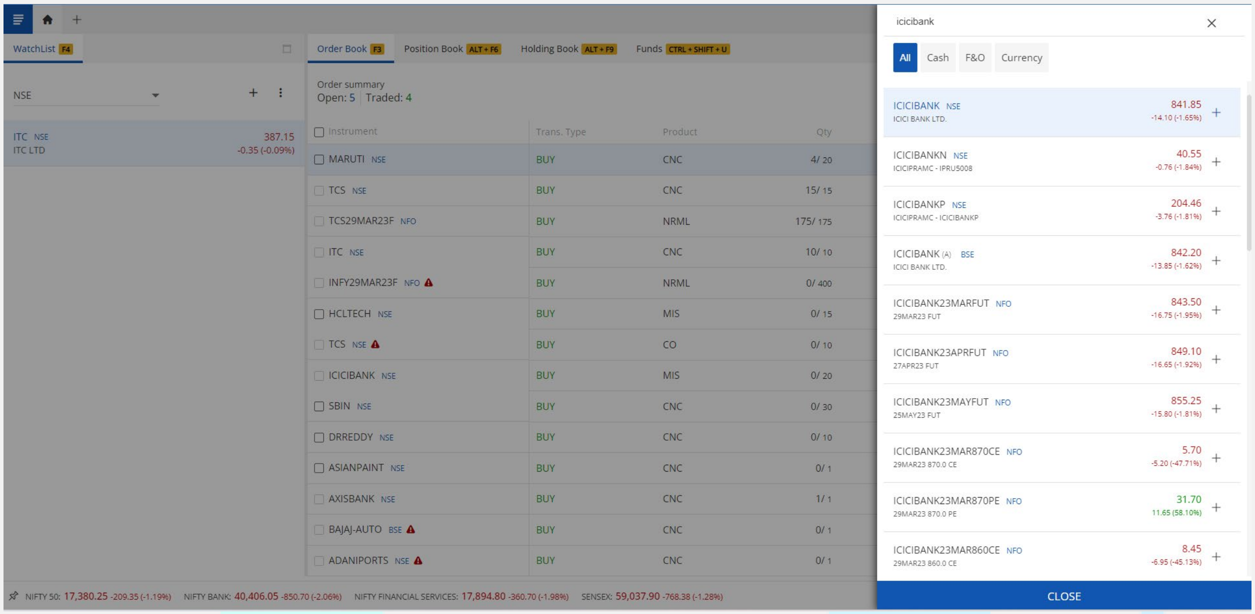
Users can add and delete stocks of their own interest and can also have multiple user defined watchlists.



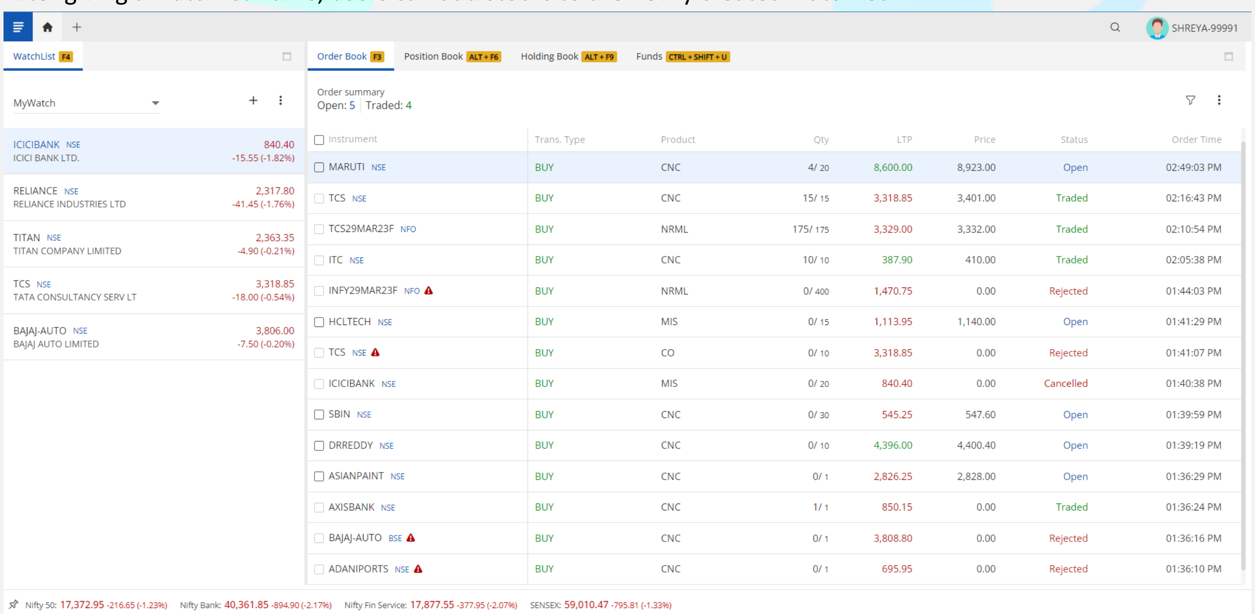
From the watchlist selection dropdown users switch between watchlists. Users can also create add/delete watchlist with the Manage Watchlist option.



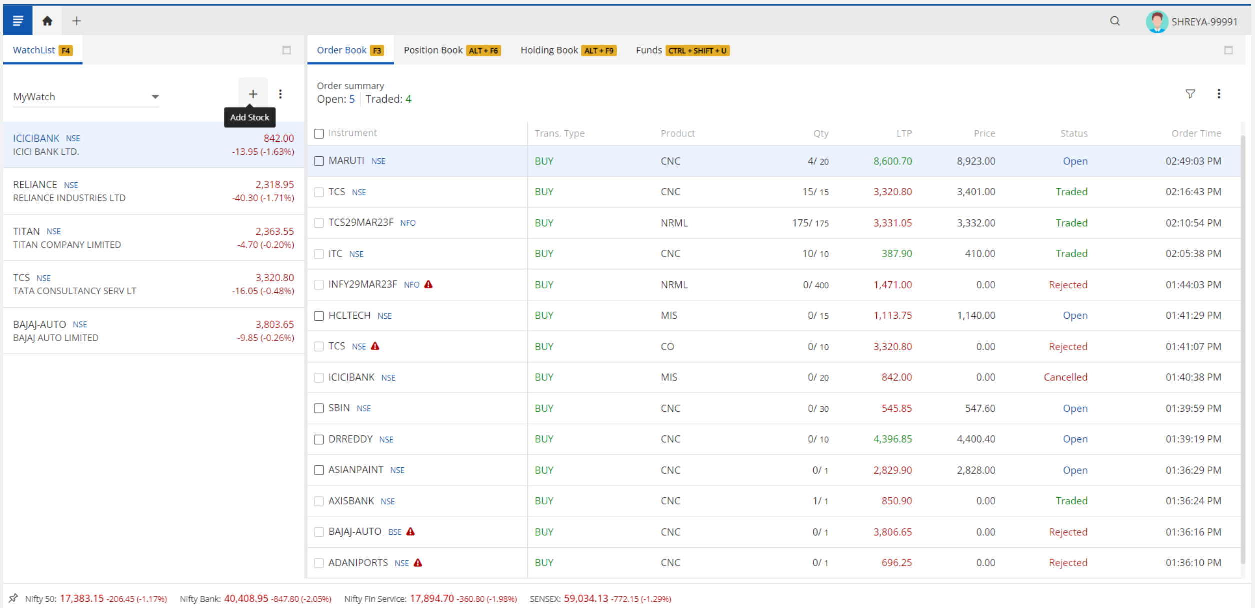
Users can give a personalised name and create a new watchlist. Users can also delete an existing user watchlist from this page.



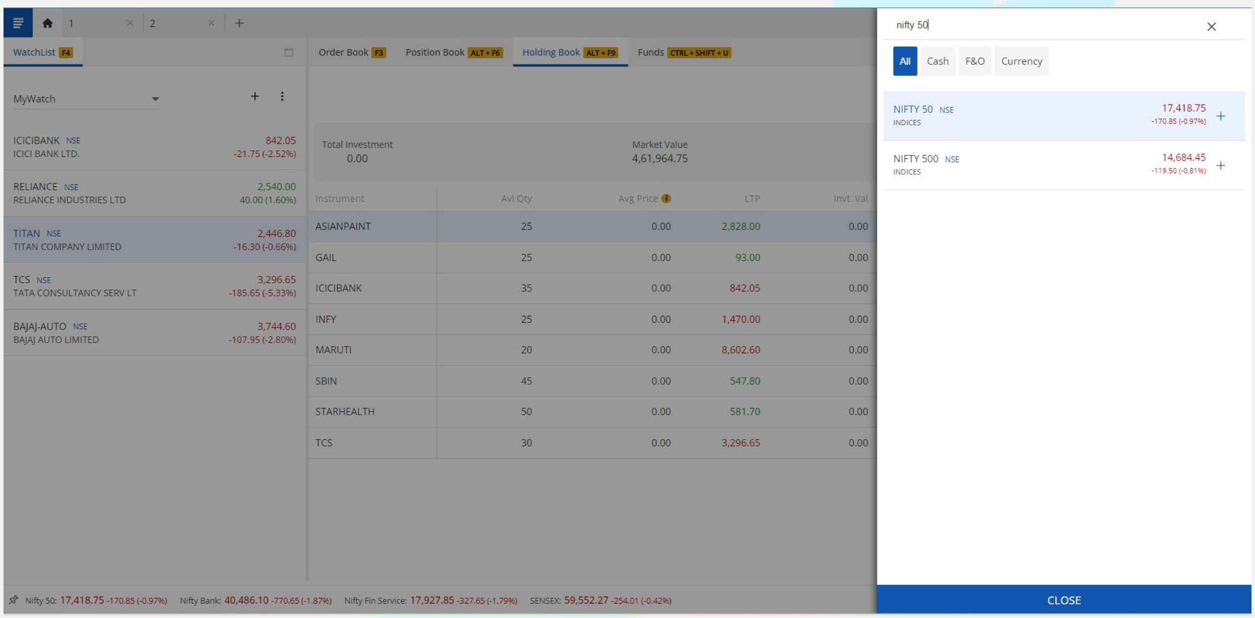
After giving a watchlist name, users can add stocks to the newly created watchlist.



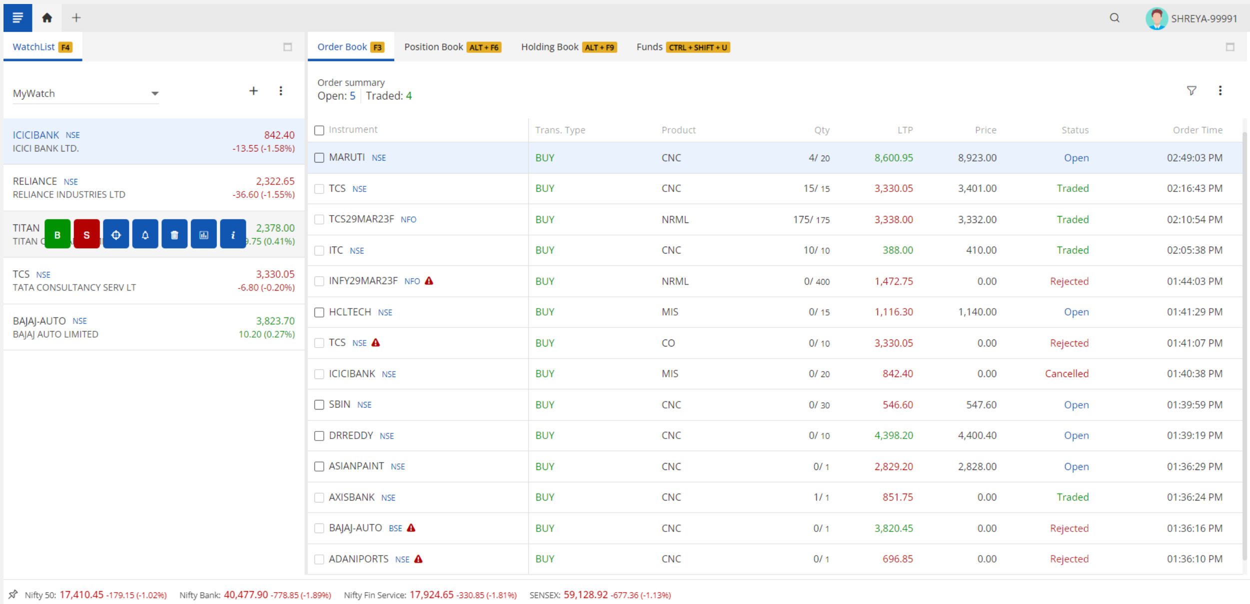
Once stocks are selected, a new watchlist can be seen with the recently added stocks.



Users can also add stock to an existing watchlist by clicking the plus "+" button.

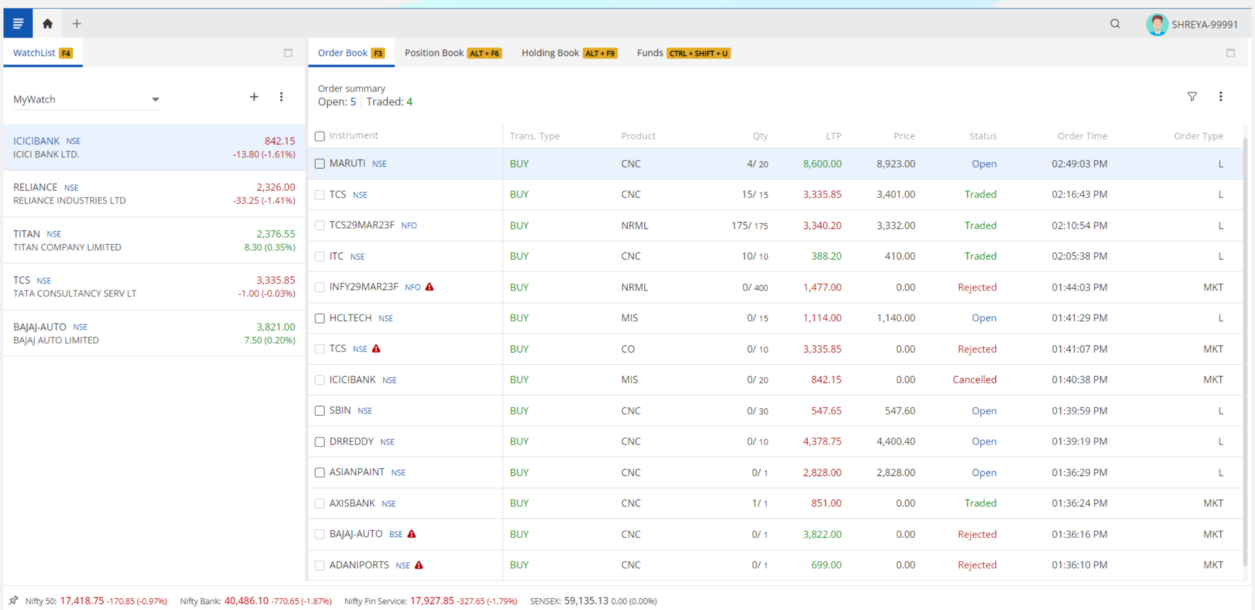


User can add Index to the Watch list by clicking the plus "+" button. This information is for viewing the index movement and allows the user to access Chart for the Index added to Watch List.

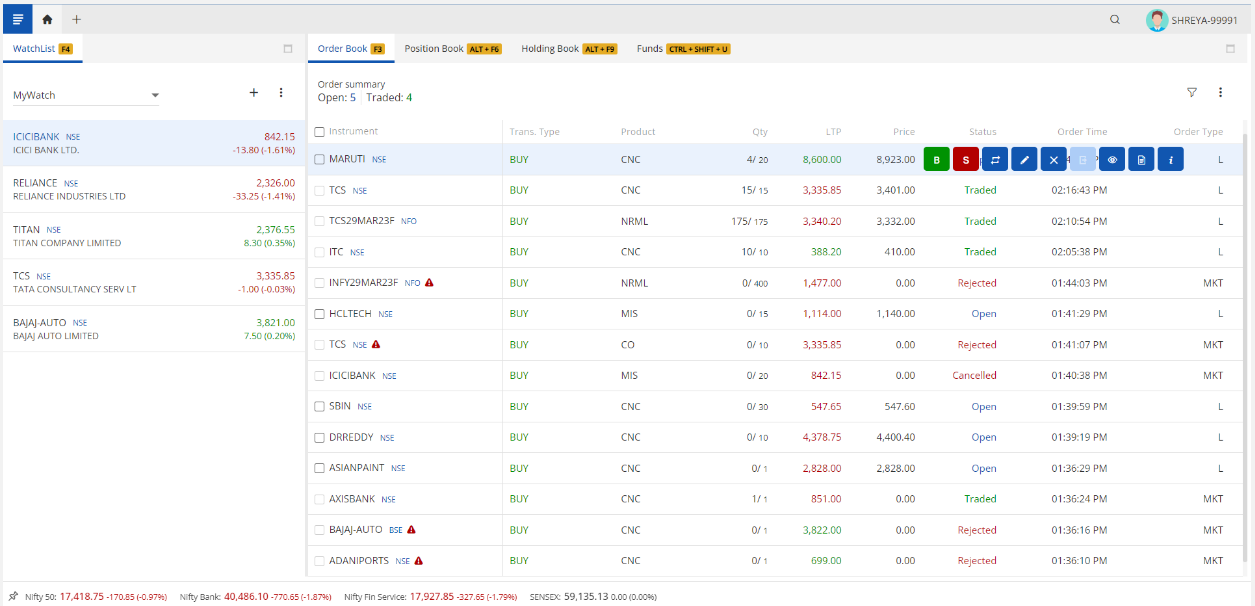


By hovering the mouse pointer on any watchlist cell user gets multiple options - Buy, Sell, Create GTT , Create Alert , Delete from watchlist, Chart and Stock Detail.

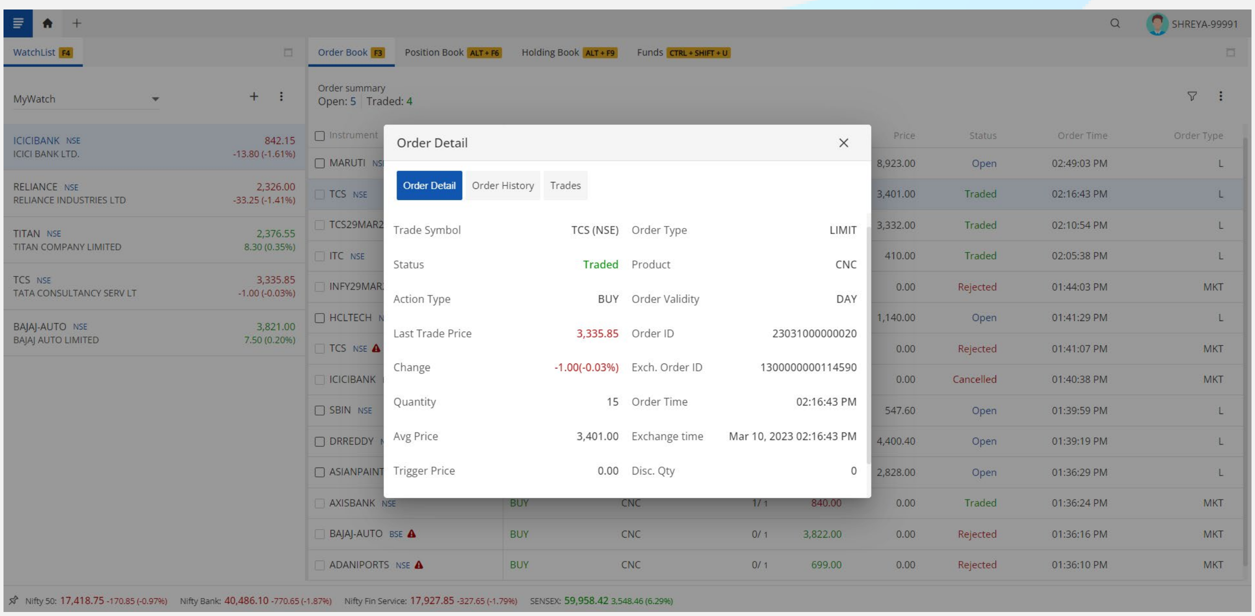
3. Order Book



Order Book screen contains the information about orders placed by the users. This book has all the information regarding their status, Order Type, Product Type etc.



By hovering the mouse pointer on any order book cell user gets multiple options - Buy, Sell, Re-Order, Stock Detail, Add to Watchlist, Order Details, Modify Order, Exit Order and Cancel Order.



This screen appears when users click on Order Detail in OrderBook. It contains all the information regarding that order and has three buttons OrderDetail, OrderHistory and Trades. The Order Detail window gives information on the Order Status and Order configuration.

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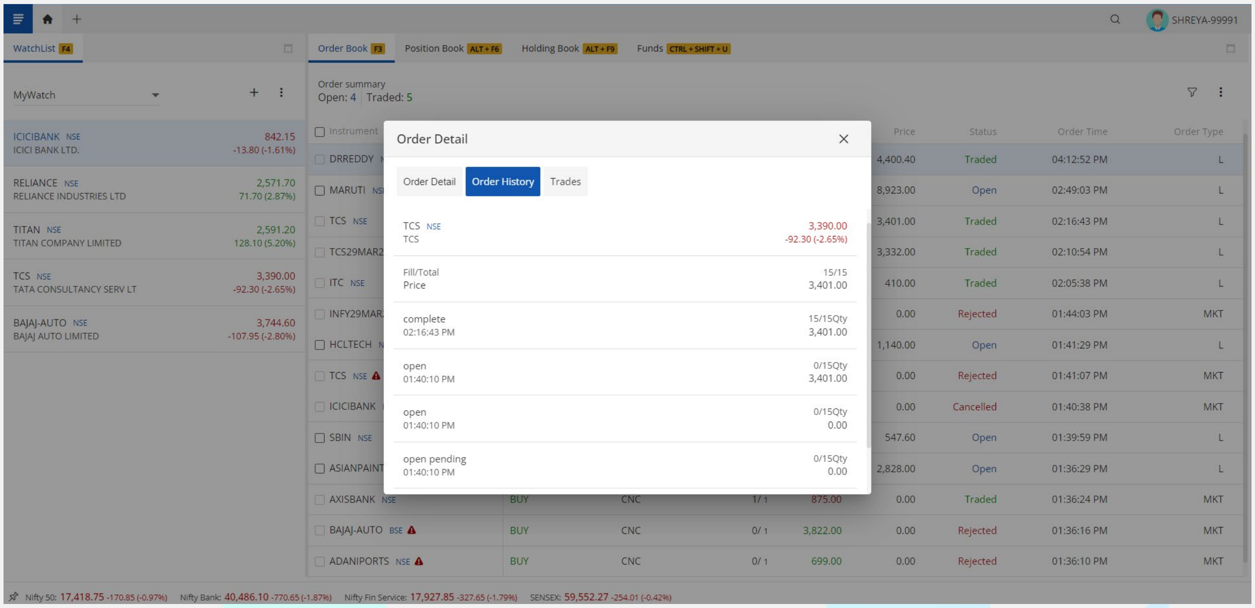
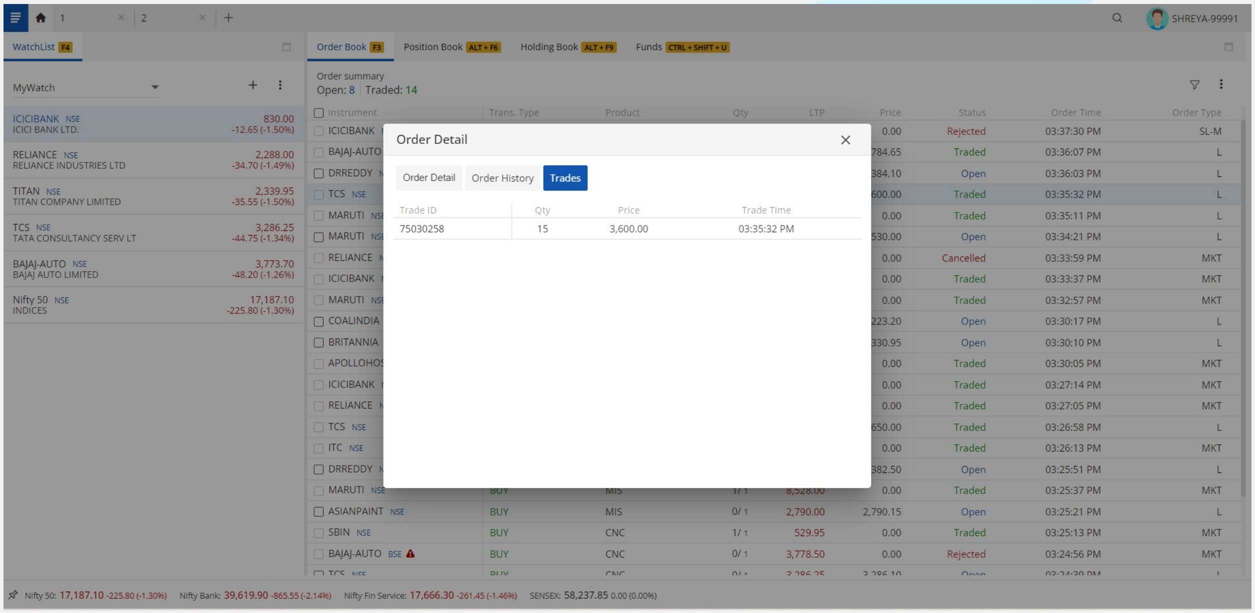
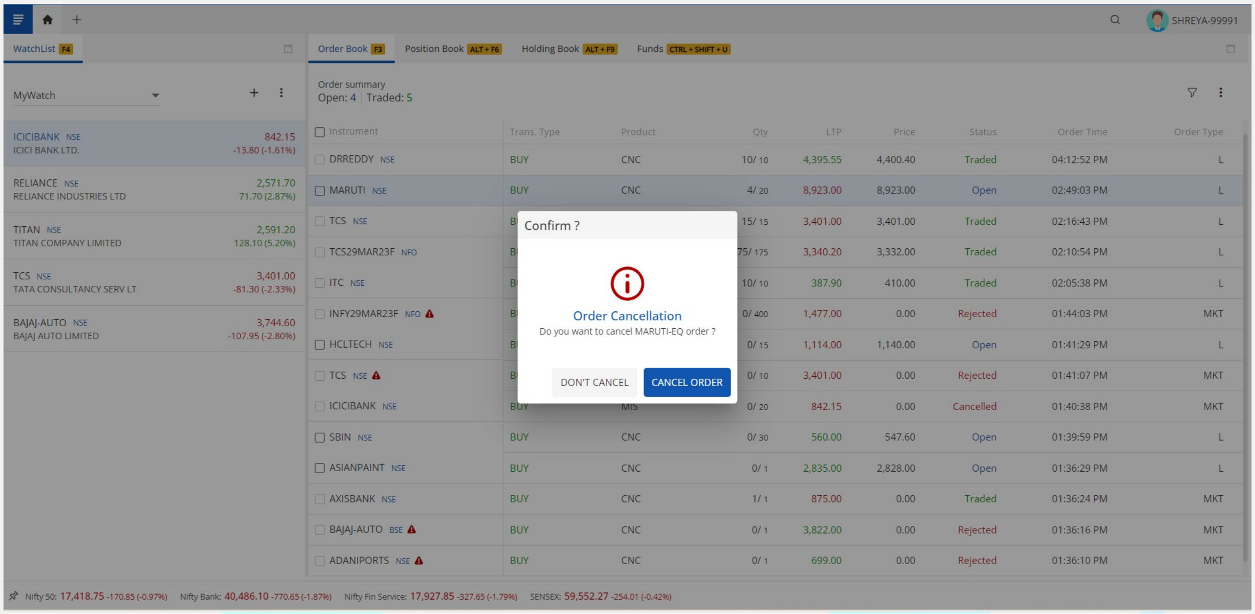


The screen appears when the user clicks on the Order History button of Order Detail of any stock in OrderBook. It contains the trail of Trade after placing the Order.

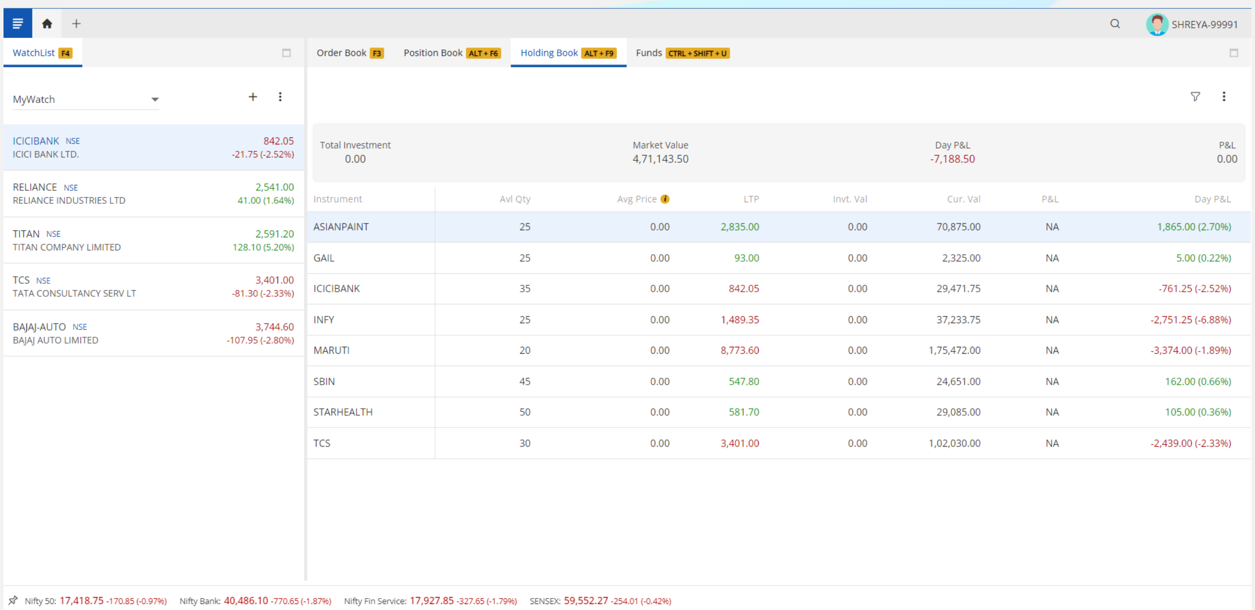


Trades that took place to complete the Order for each stock will be listed in this screen of the Order Detail Window.



The screen appears when the user clicks on the Cancel button in Order Book, on clicking CANCEL ORDER order will be cancelled.

5. Holdings



Holding Book contains user's holdings.

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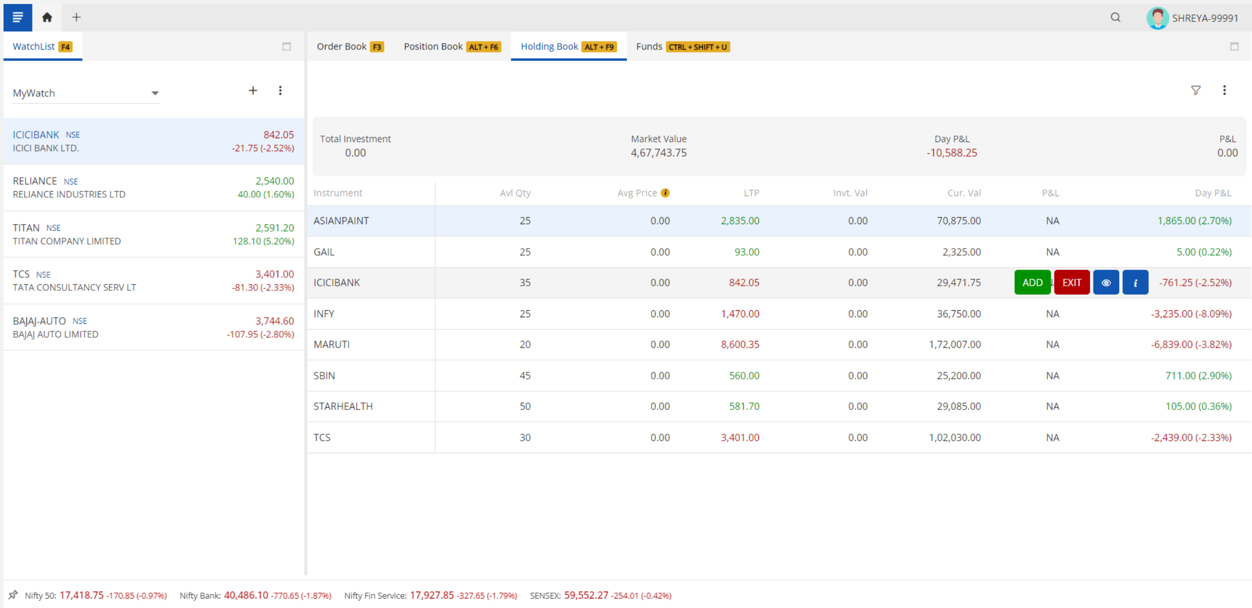
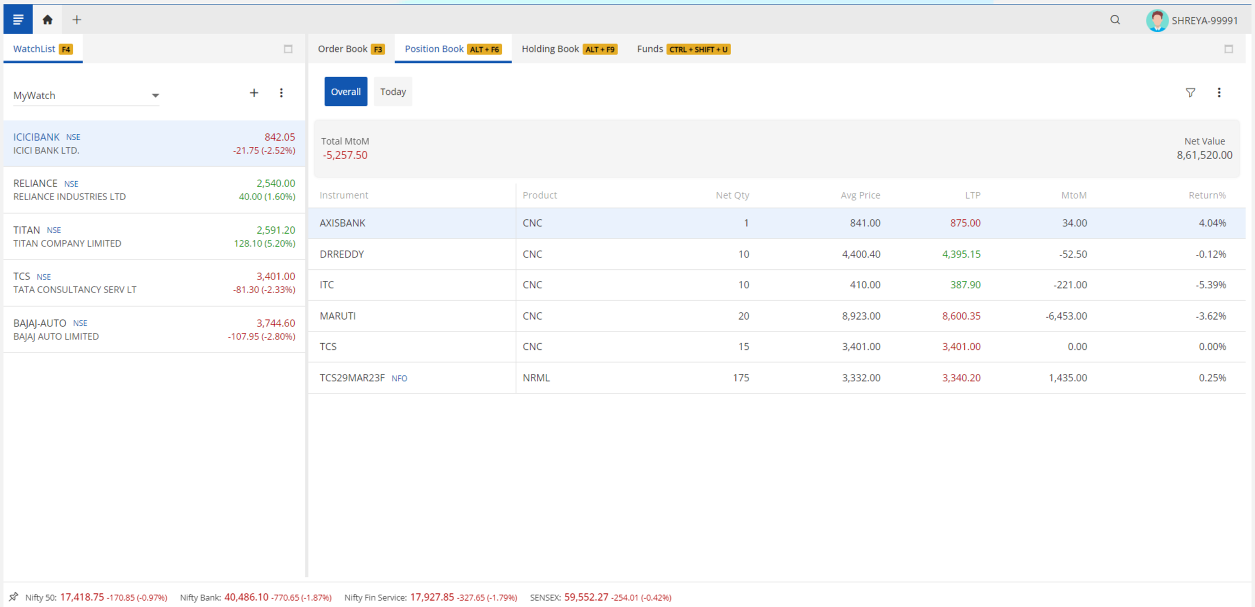
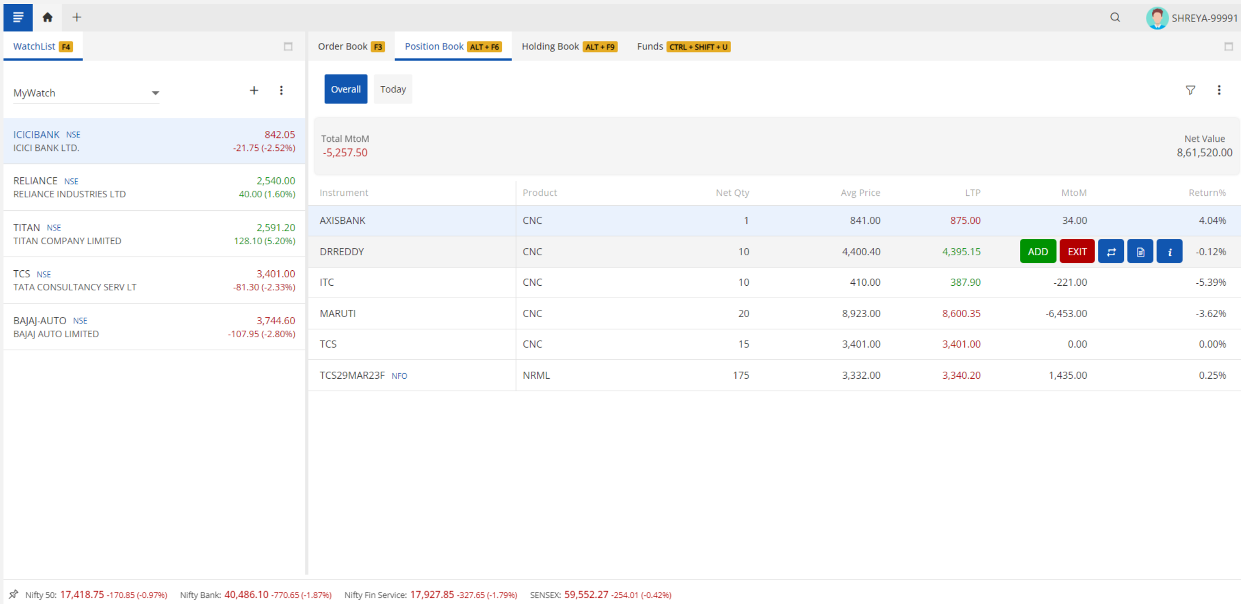


By hovering the mouse pointer on any holding cell user gets multiple options - Add, Exit, Stock Detail and Add to watchlist.

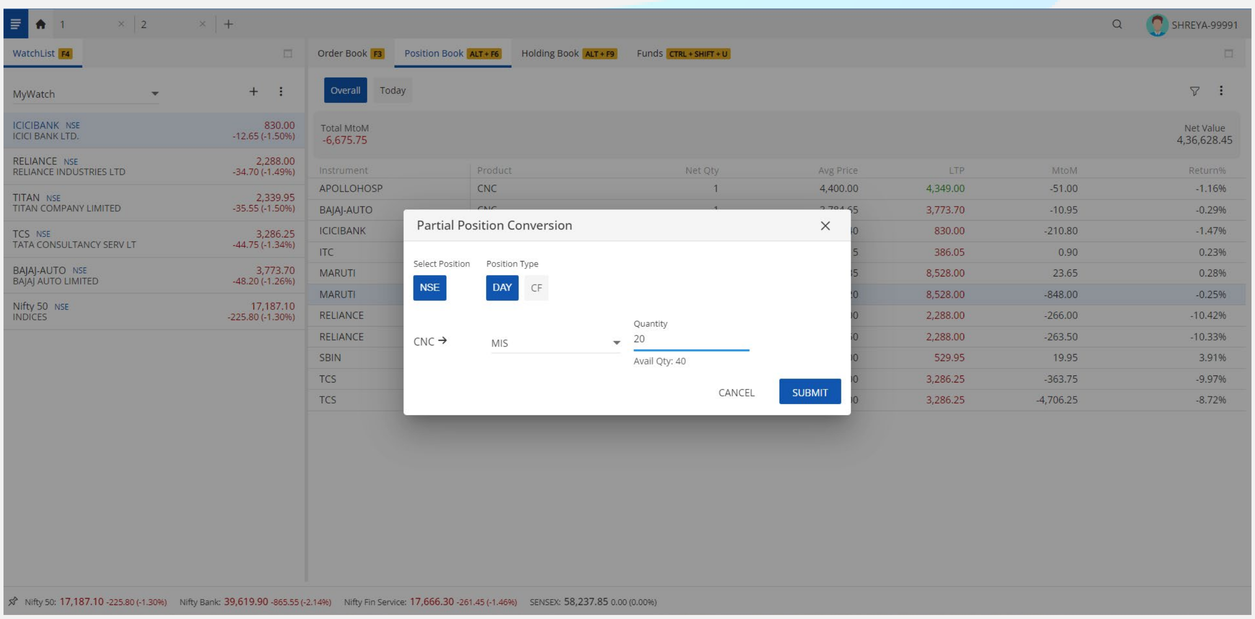
6. Positions



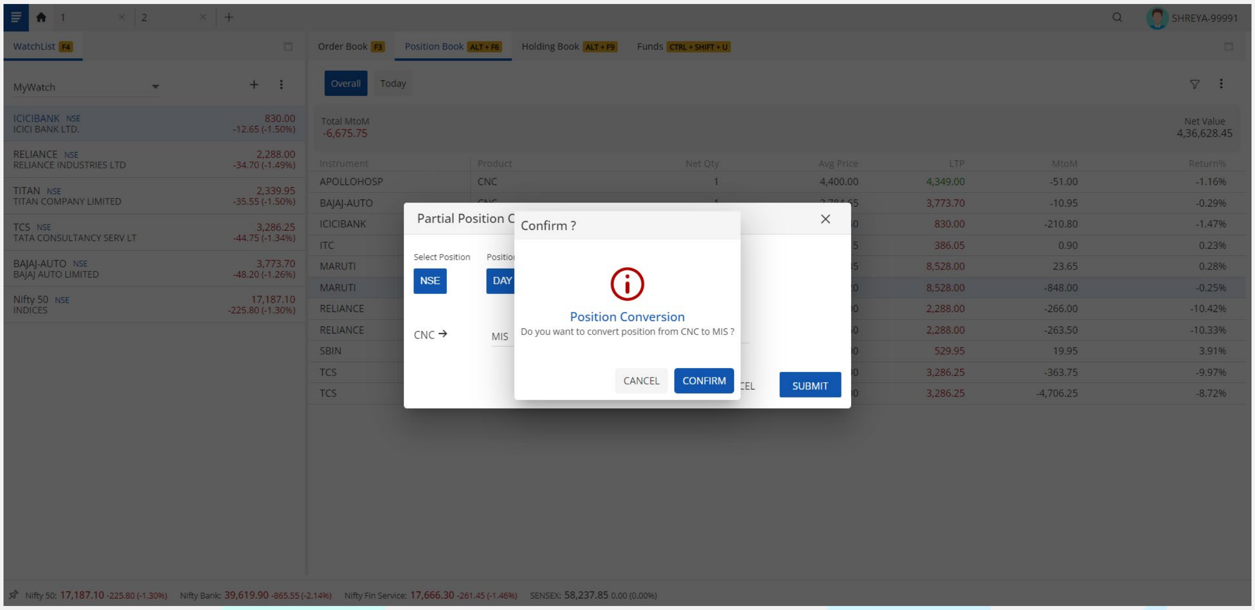
When any order gets completed then it converts into a position in the user portfolio, and the position book contains positions of a single day.



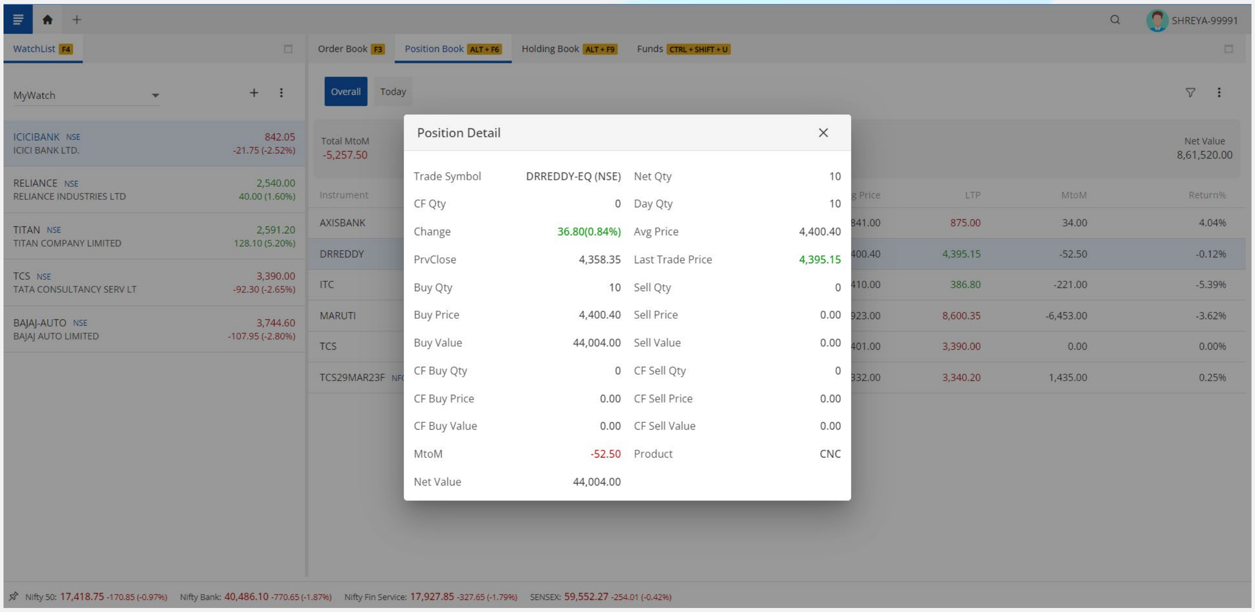
By hovering the mouse pointer on any position cell user gets multiple options - Add, Exit, Product Convert, Position Detail and Stock Detail.



On Clicking on Product Convert this Partial Product Conversion window will allow the user to make changes to the Product Type. User can choose to do a Partial Product Conversion by specifying the quantity.

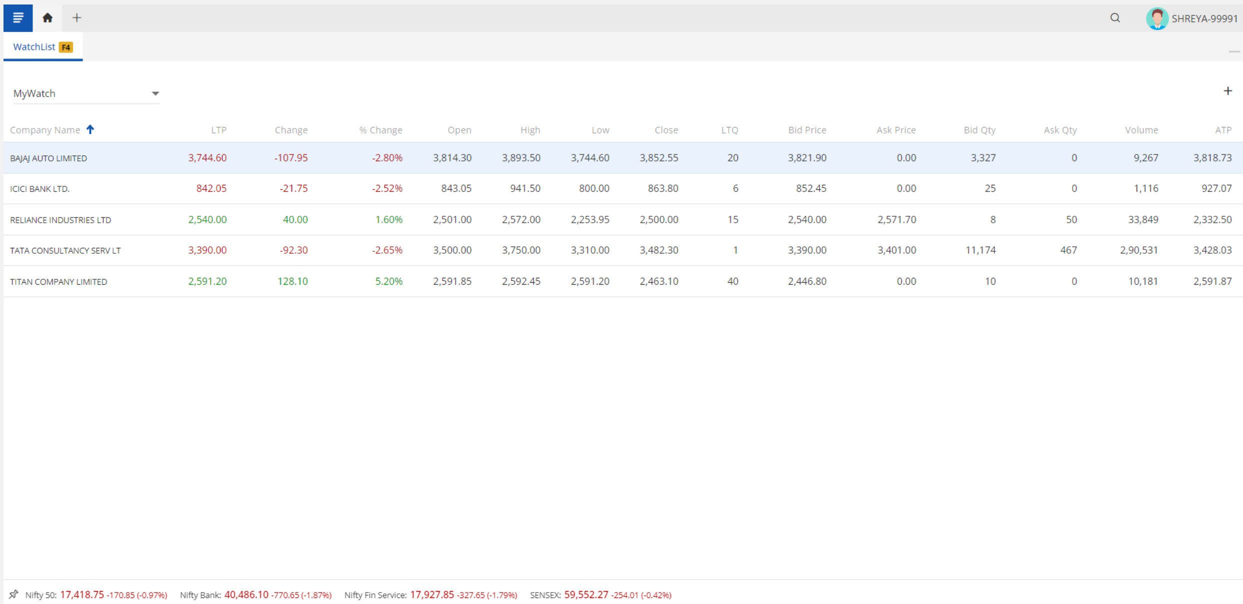


A Confirmation message will appear for the user to review the change and then confirm.

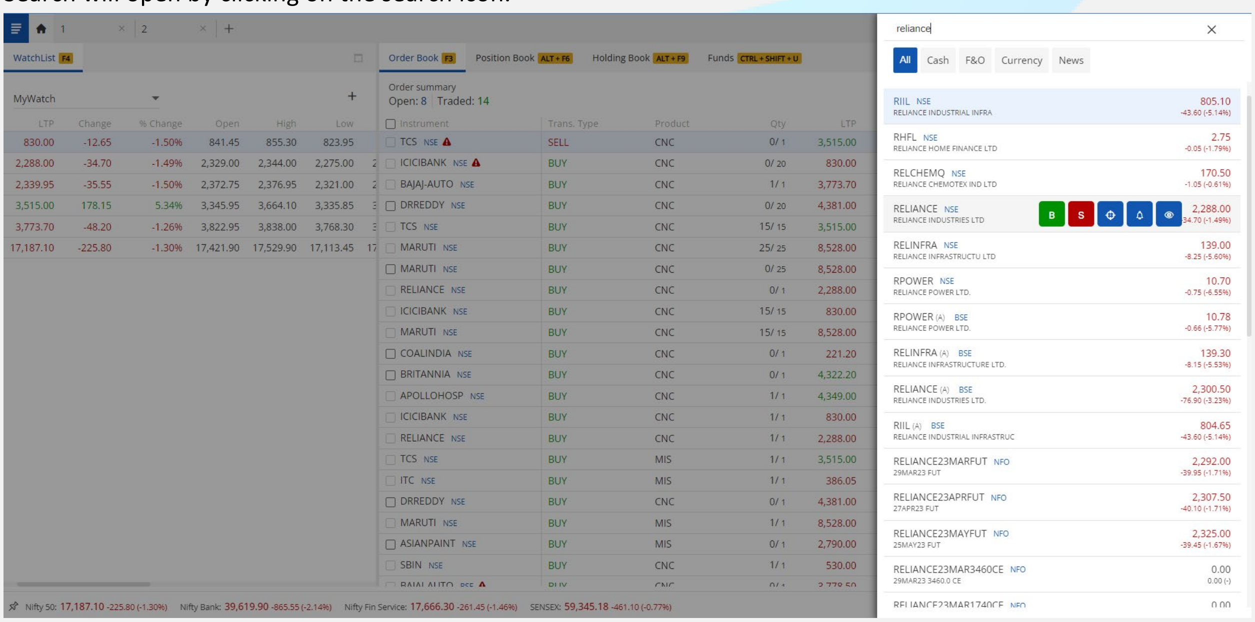


User can click on Position Detail to see more information on the Position made on a stock.

7. Stock Search

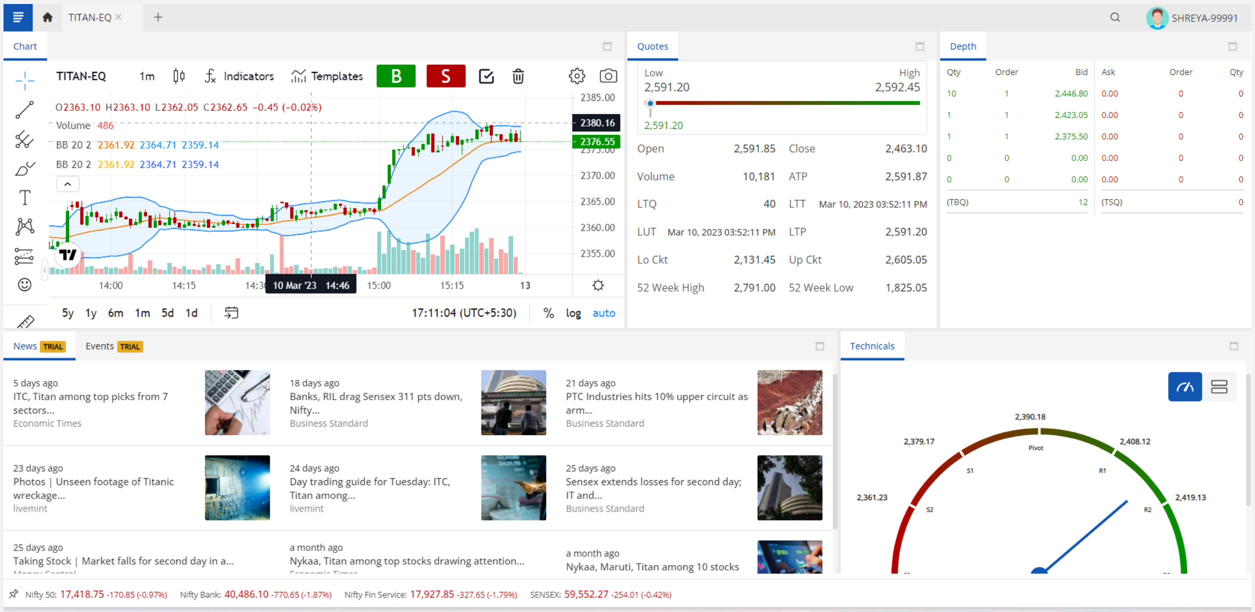


Search will open by clicking on the search icon.



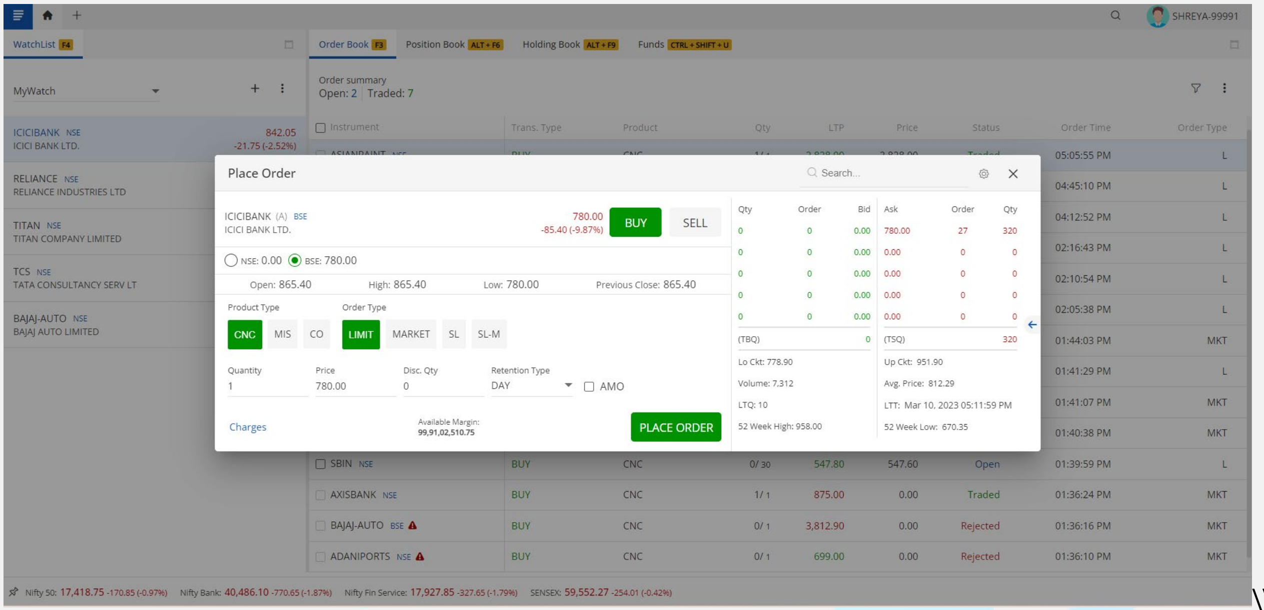
User can search any stock on the Stock Search screen. Upon clicking on any stock the StockDetailPage appears. User can Place Orders, Create GTT and Create Alerts from the StockSearch Window.

8. Stock Detail



Stock Detail screen contains all the information regarding the specific stock. It will be displayed when the user clicks on the Stock Detail button in the Watch List or from the Stock Search Page.

9. Place Order



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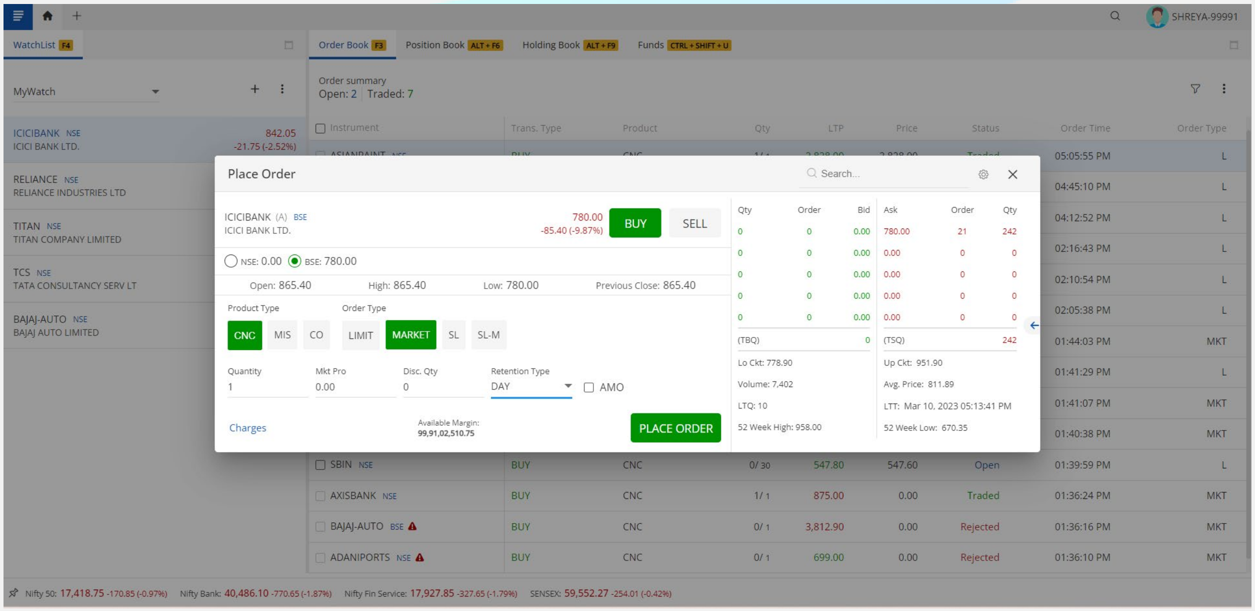
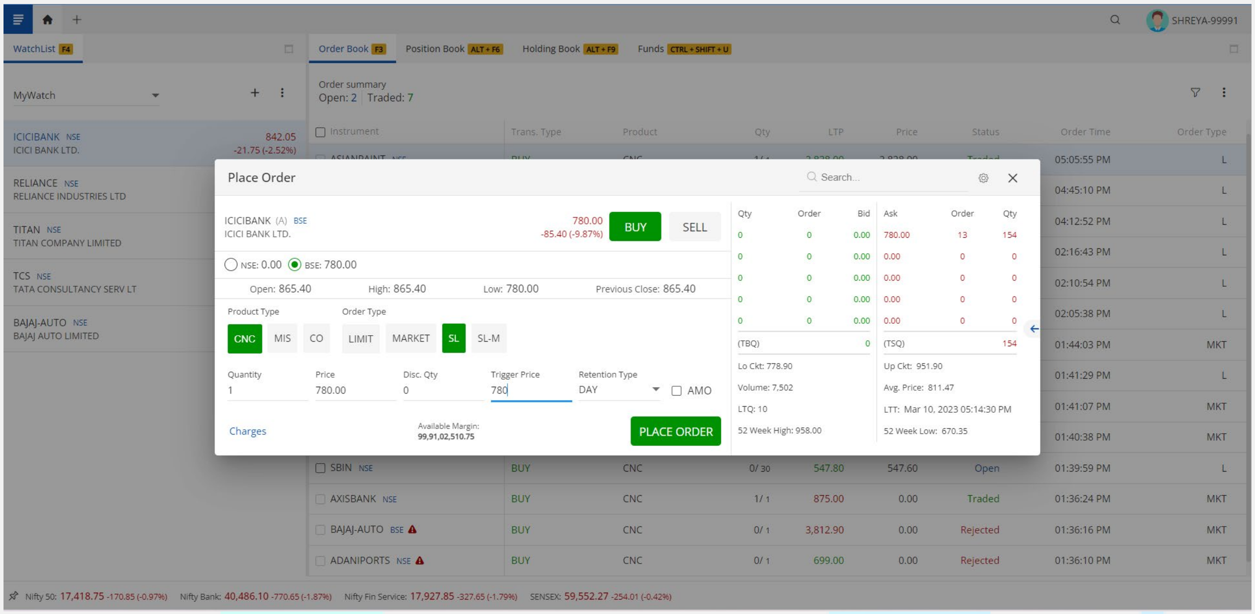
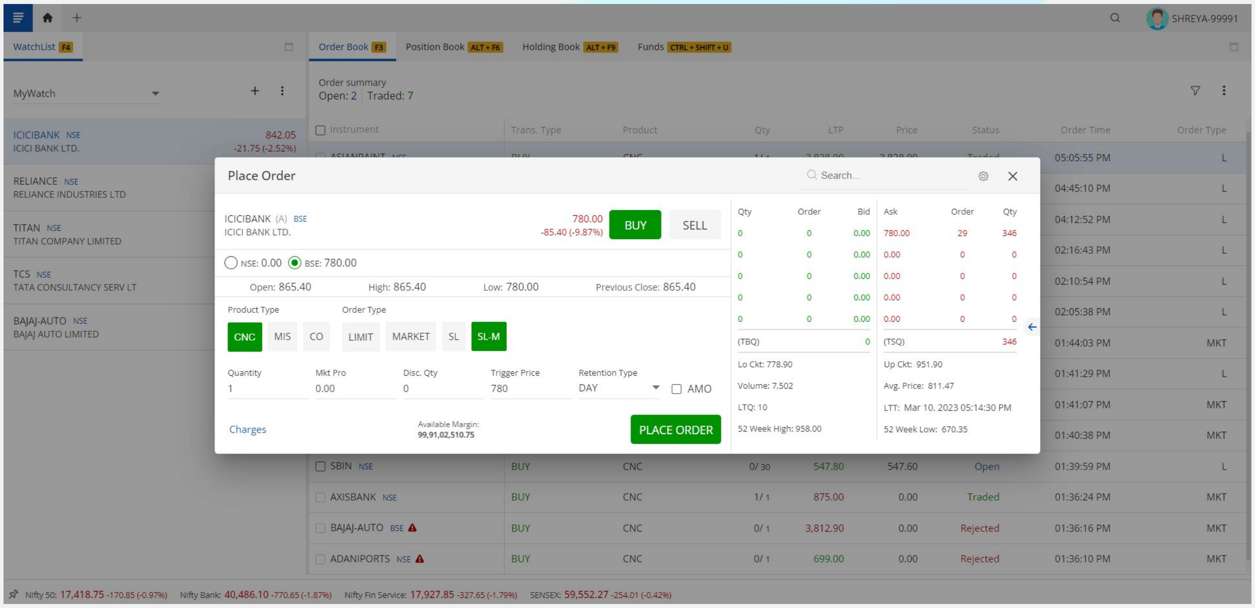
Users can place orders from Place Order Form. Users can select Buy or Sell transaction type. Users can also switch between CNC and MIS. Retention type can also be changed to Day or IOC. In the case of AMO order, users should tick mark the AMO checkbox.



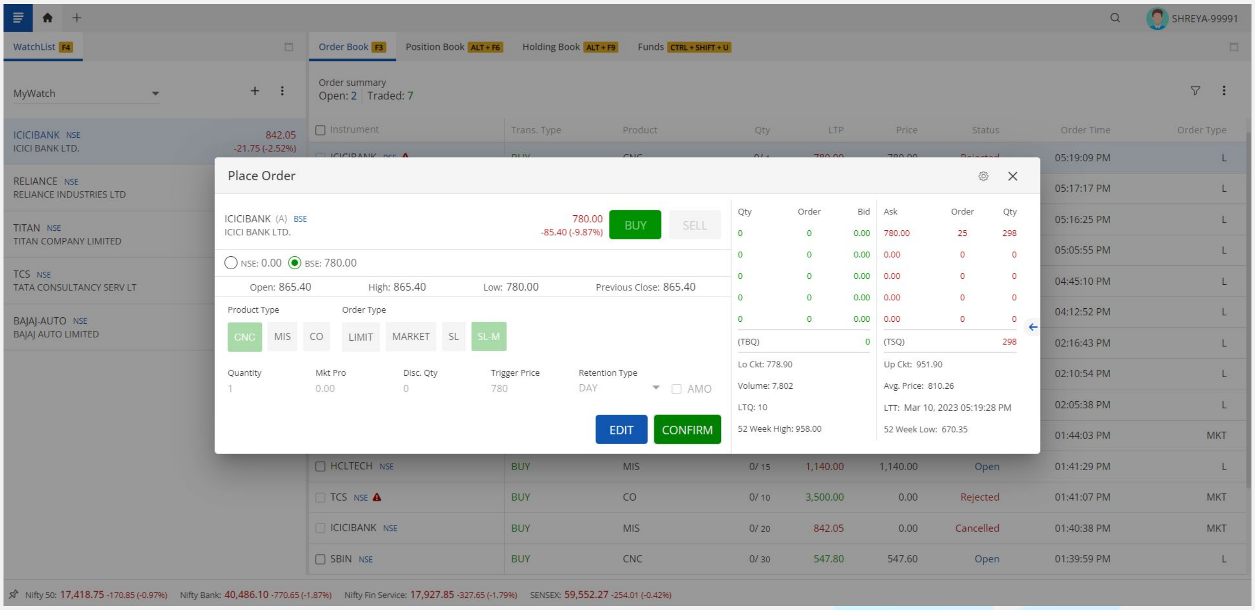
Users can place MARKET Orders and Retention type can also be changed to Day or IOC. In the case of AMO order, users should tick mark the AMO checkbox.



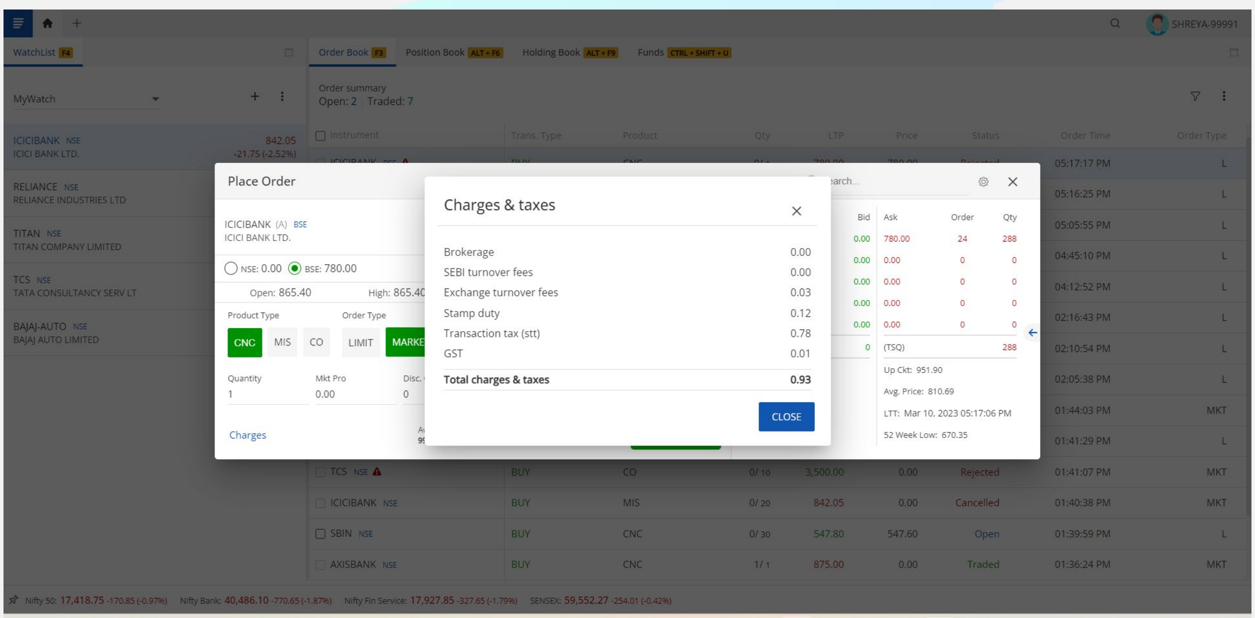
Users can place SL Orders and Retention type can also be changed to Day or IOC. In the case of AMO order, users should tick mark the AMO checkbox.



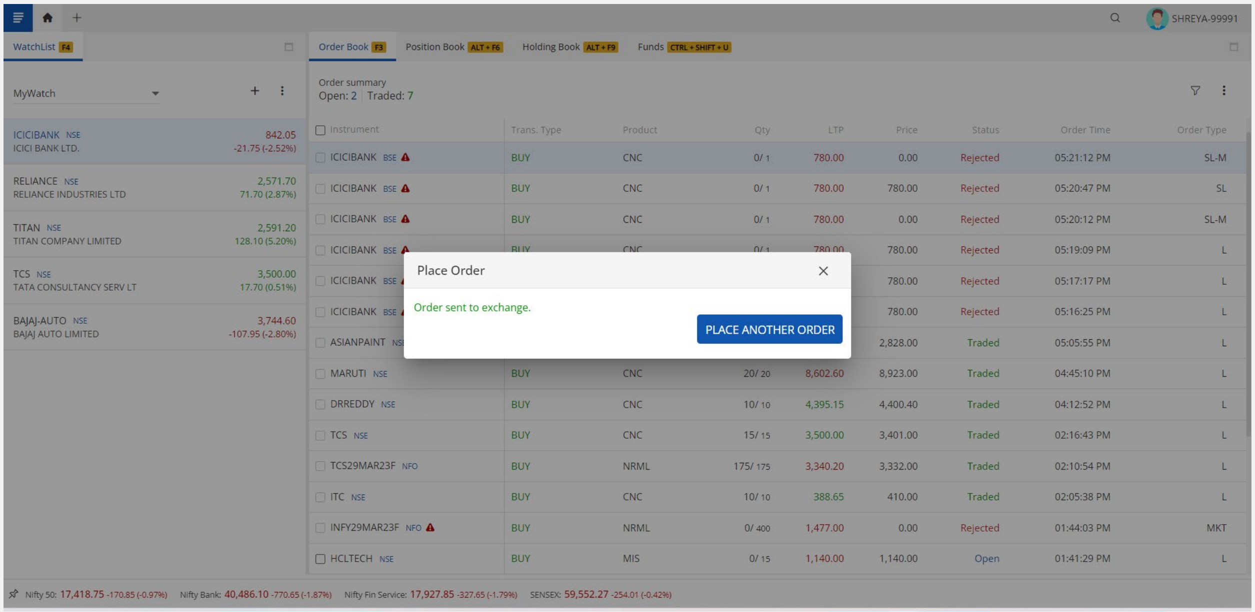
Users can place SL-M Orders and Retention type can also be changed to Day or IOC. In the case of AMO order, users should tick mark the AMO checkbox.



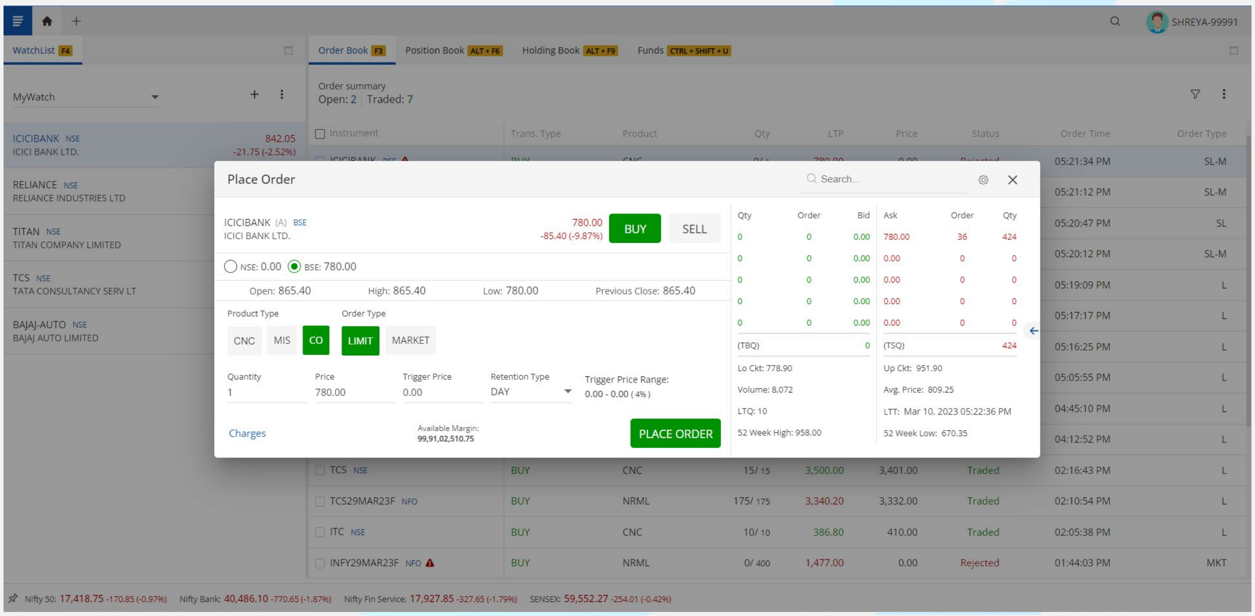
Users can confirm all the order details after order placement.



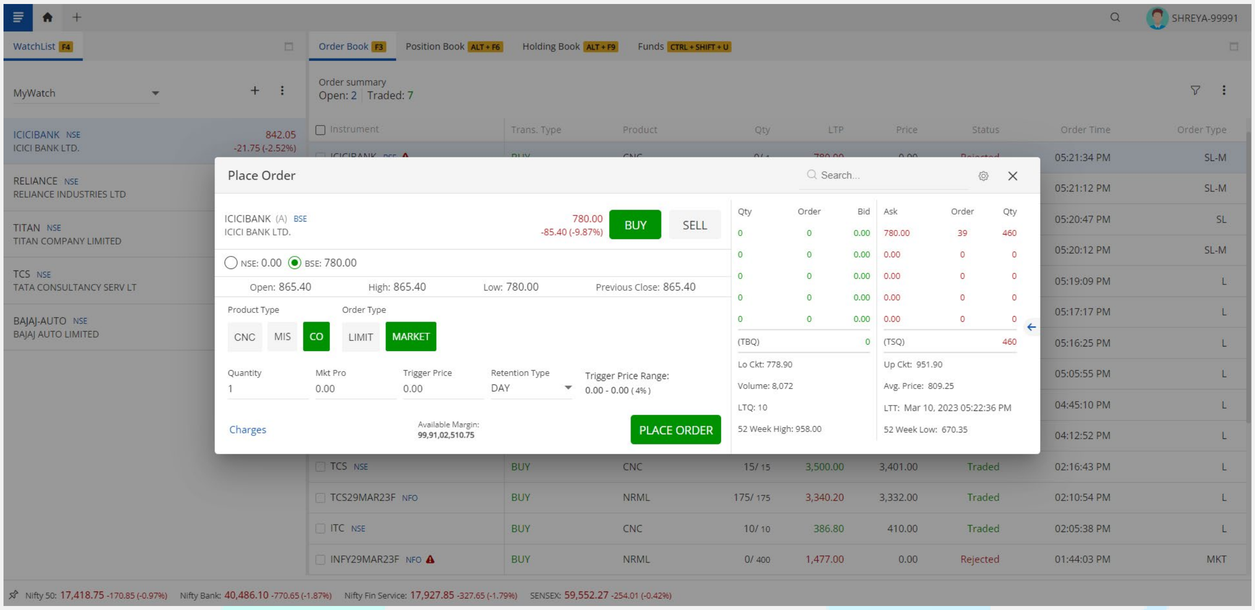
Order placement window also displays details of brokerage charges.



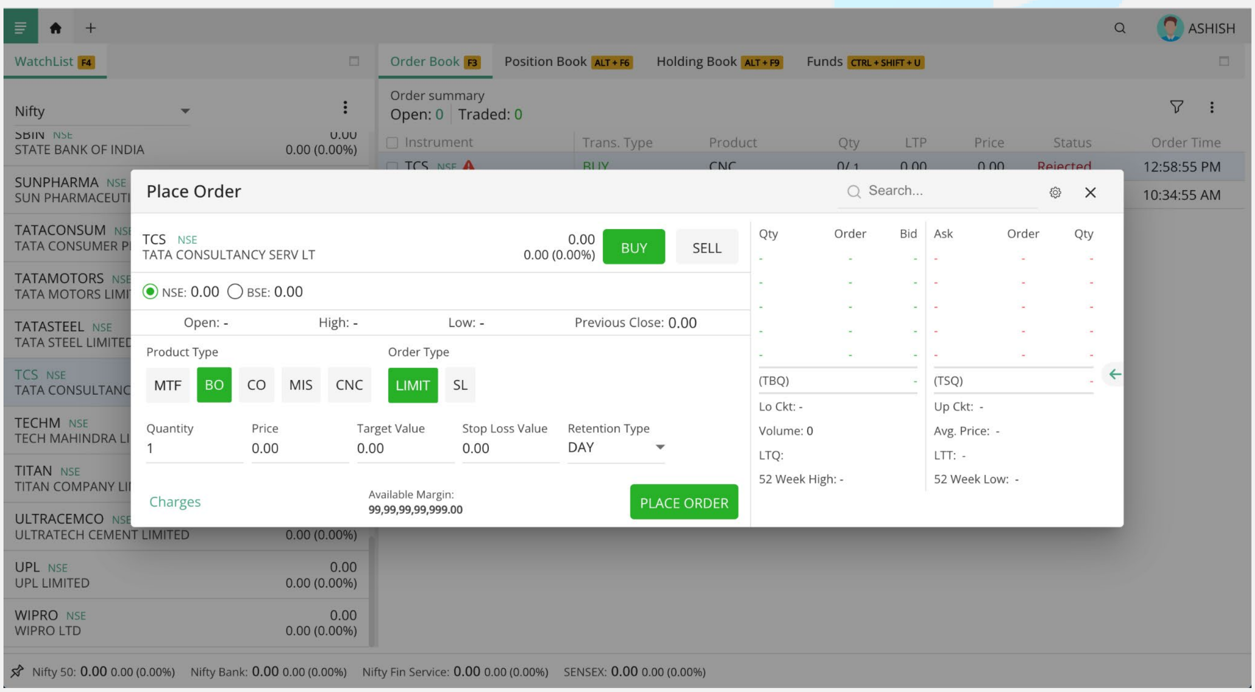
Users can see placed order status.



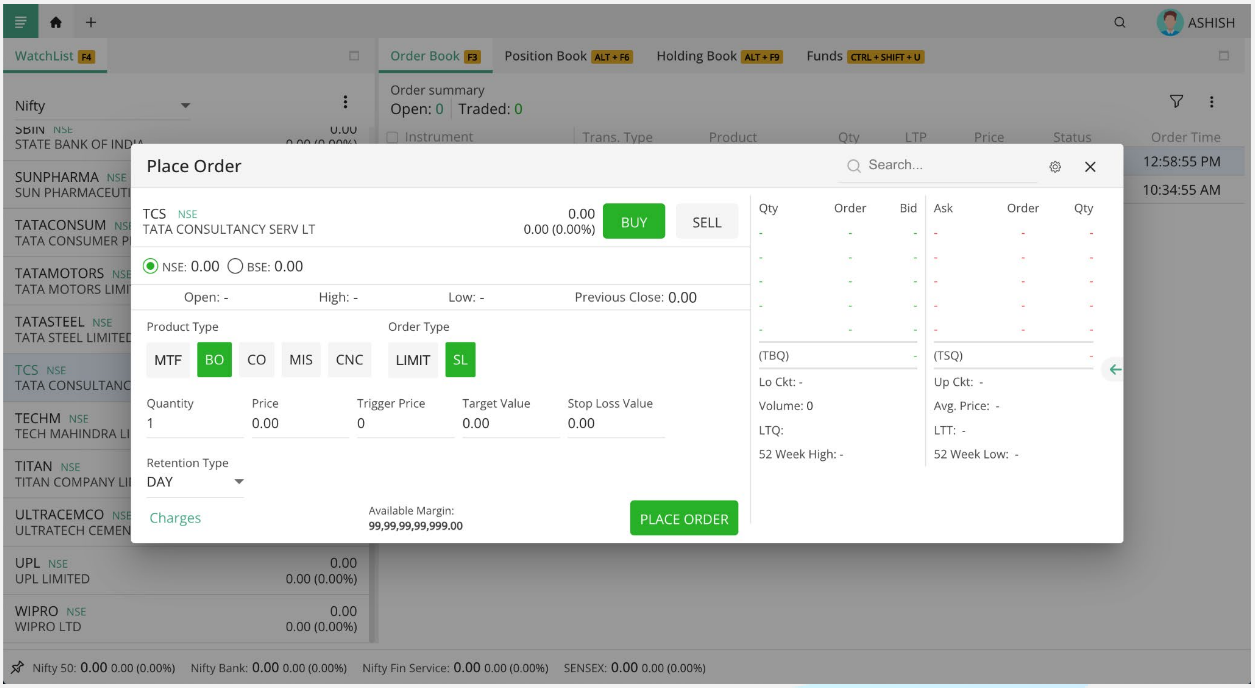
Users can also place CO orders with LIMIT.



Users can also place CO orders with Market.

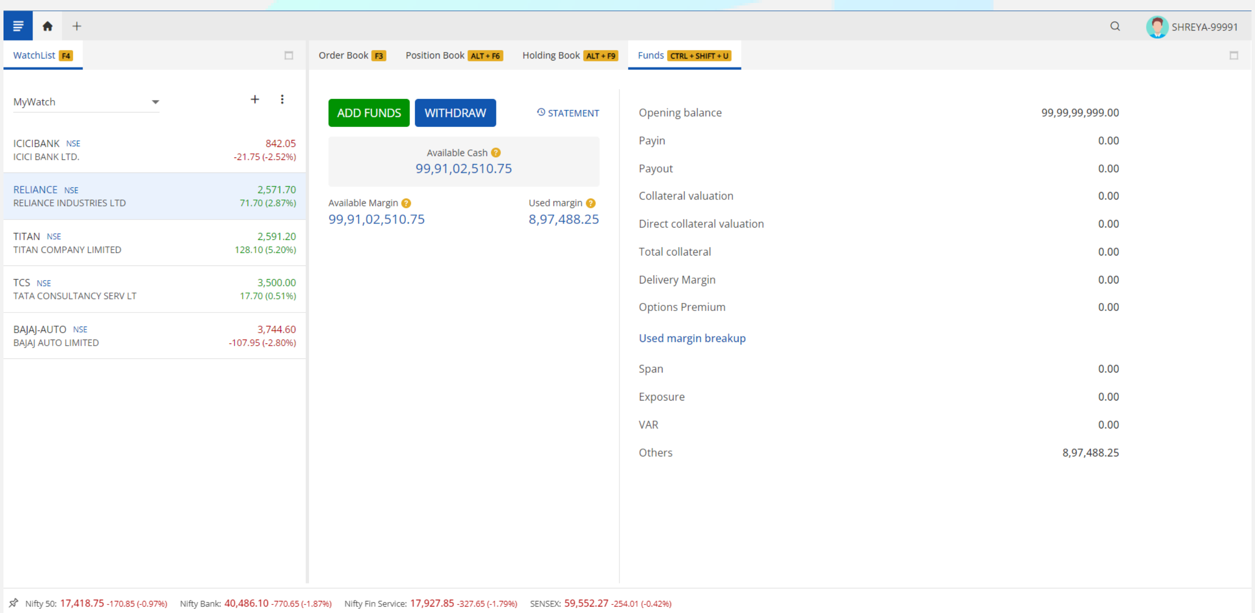


Users can also place BO orders with Limit.



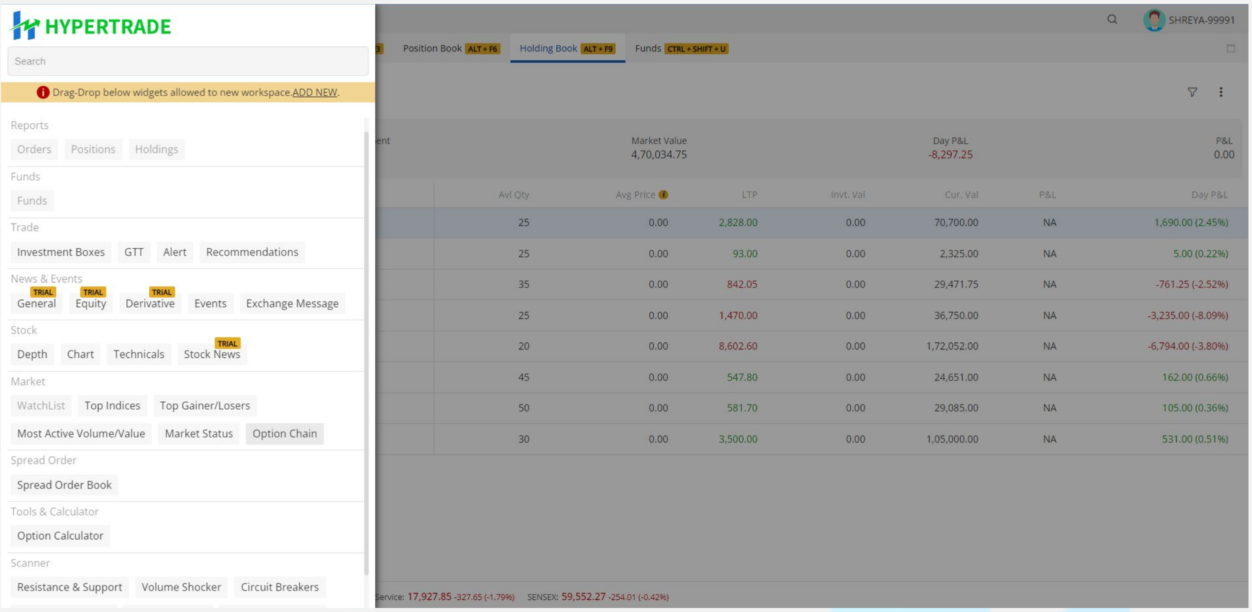
Users can also place BO orders with Stoploss Limit.

10. Limits

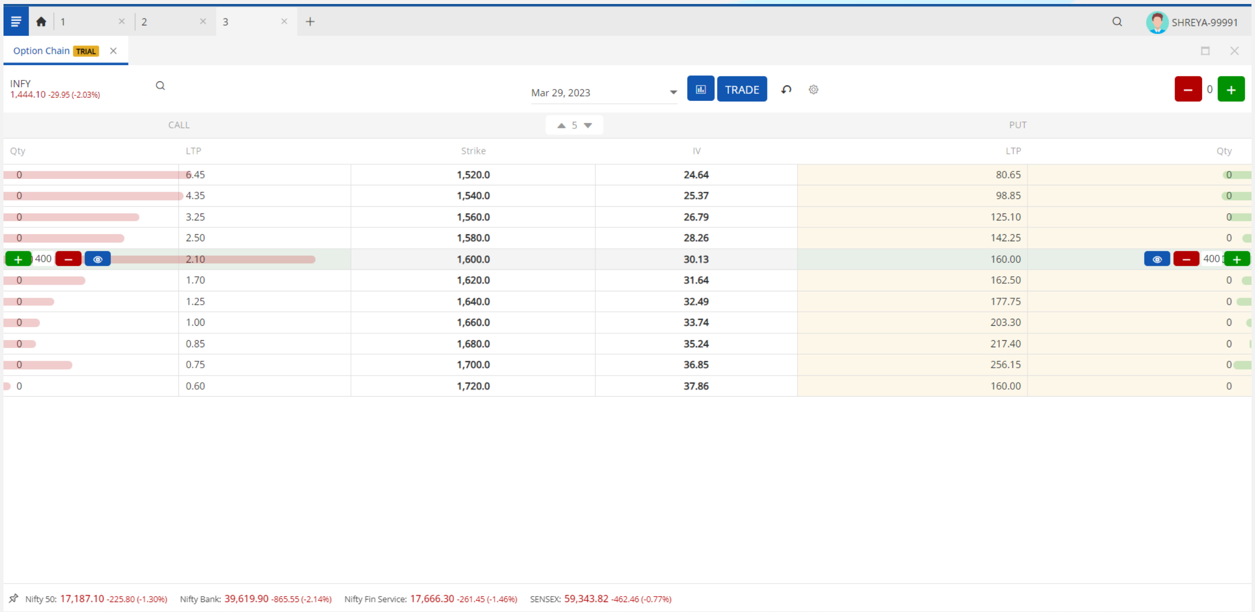


Limit Page contains information related to margin utilized, margin available, opening balance and few other margin parameters. User can also add and withdraw funds from this page.

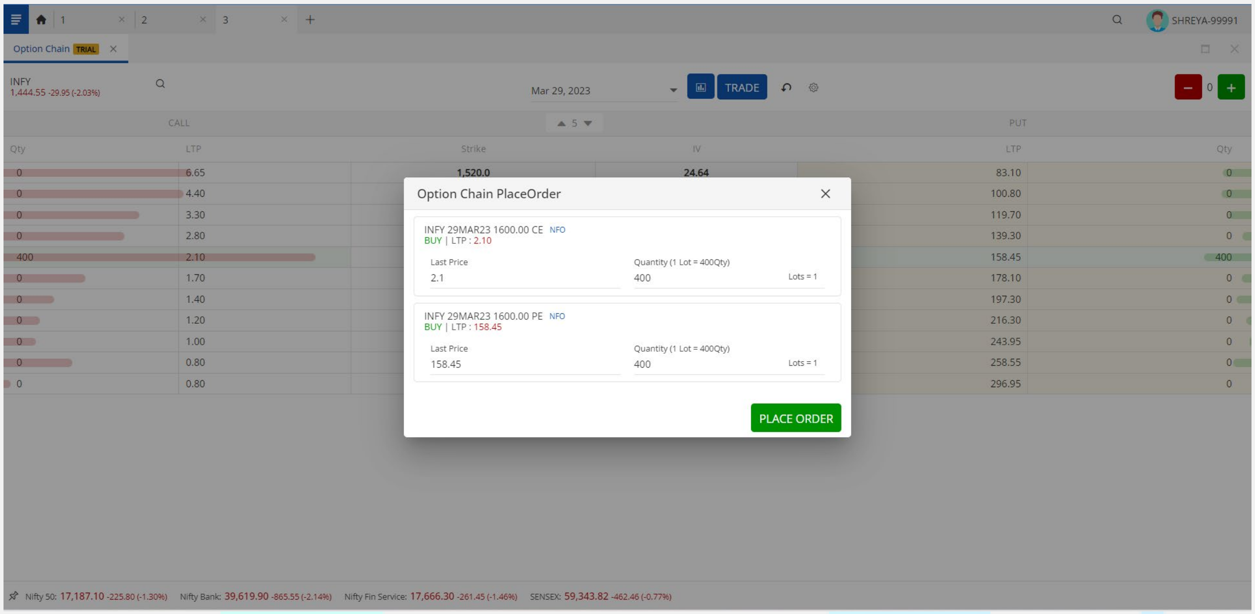
11. Option Chain



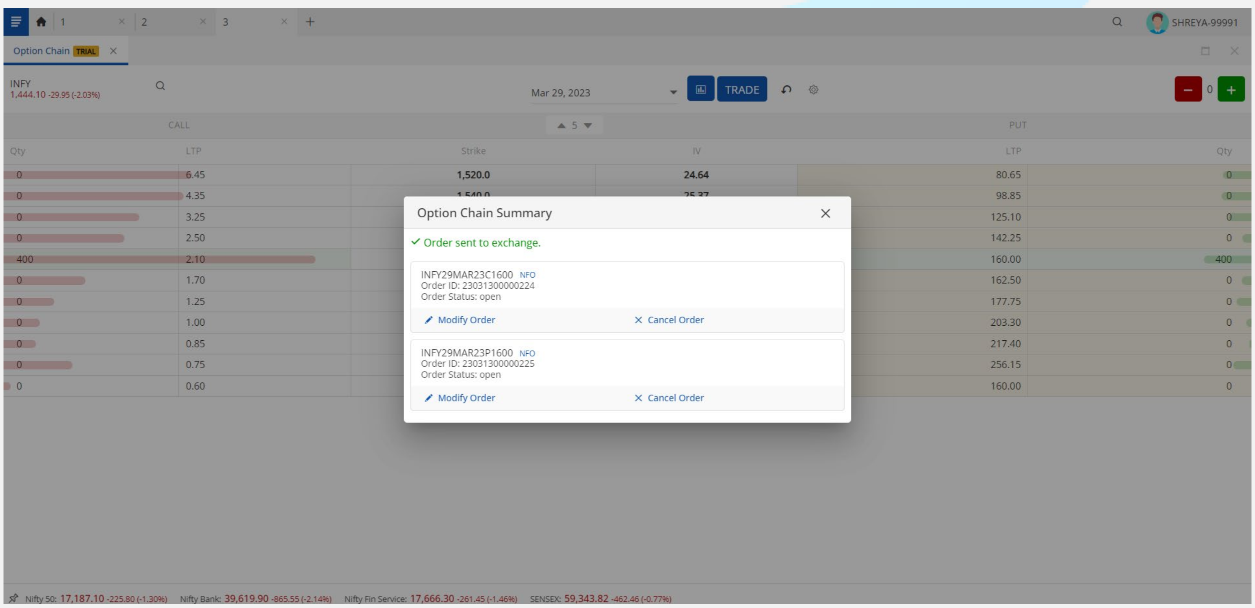
Under the mega menu Option Chain is available, users can click and open this page.



Users can click on the “+” or “-” button to Buy or Sell any option instrument.

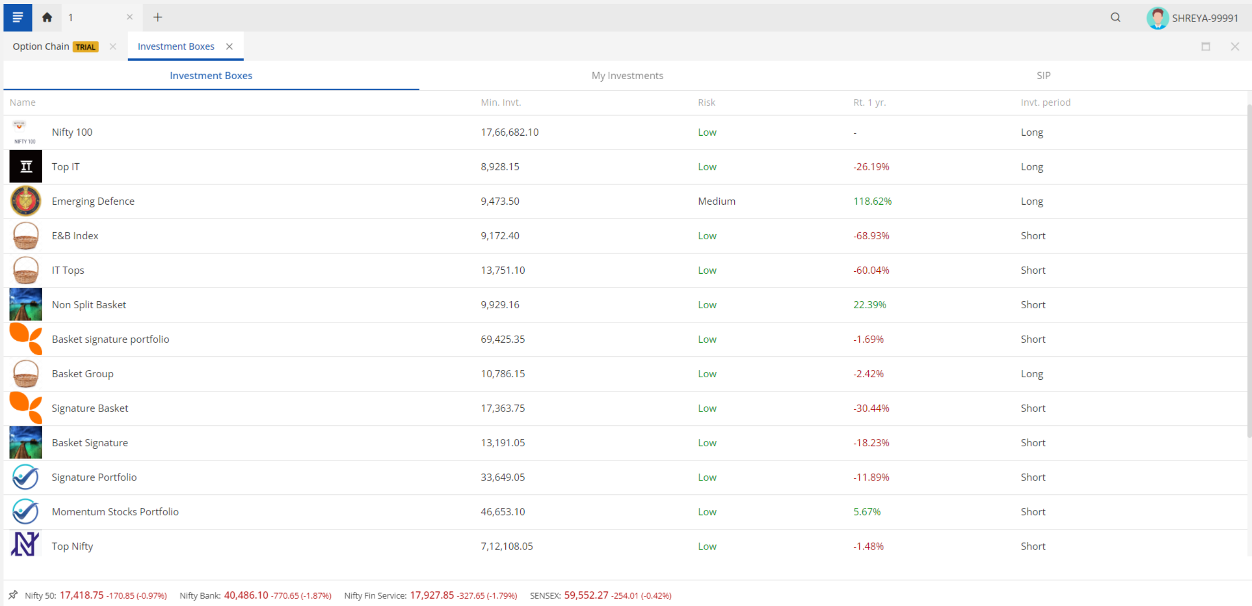


Basket Orders can be placed from the Option Window on selecting Option Trades.

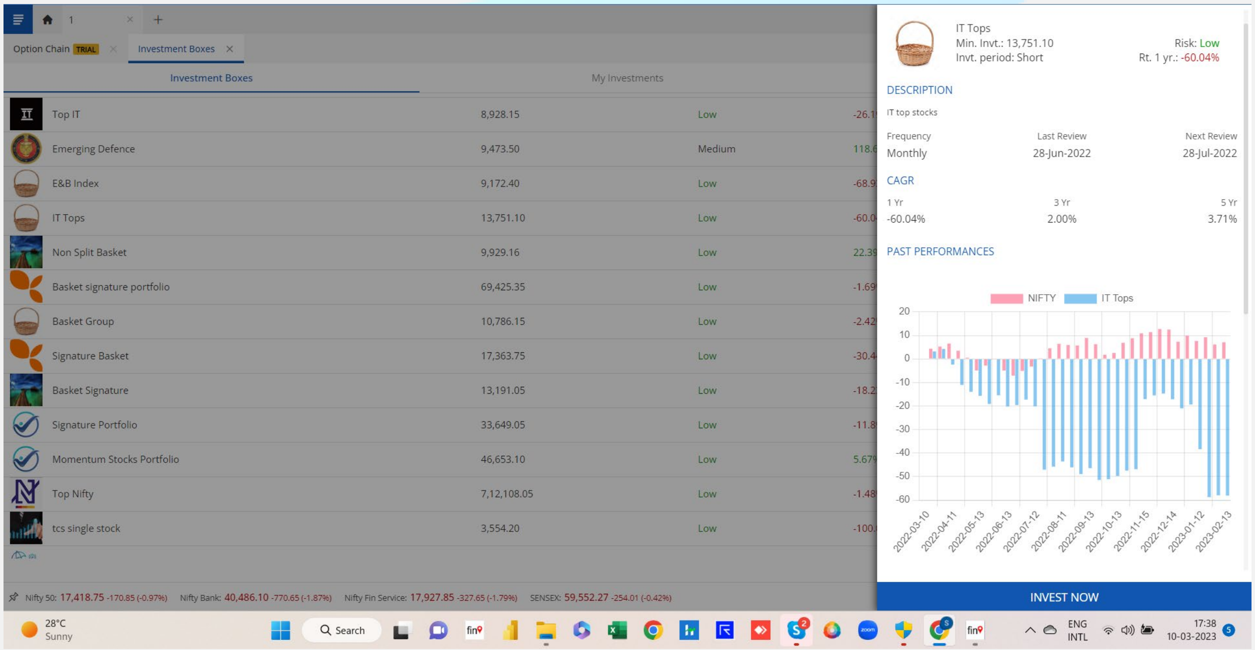


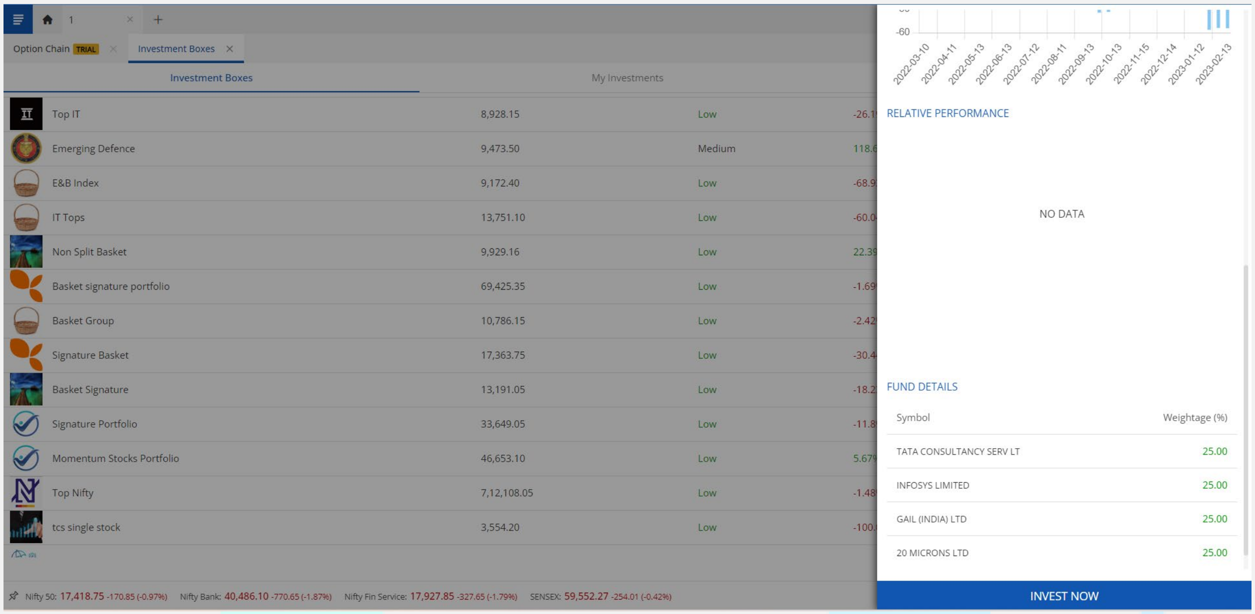
Once the Order is placed a confirmation screen appears with Modify/ Cancel Order Feature.

12. Investment Box

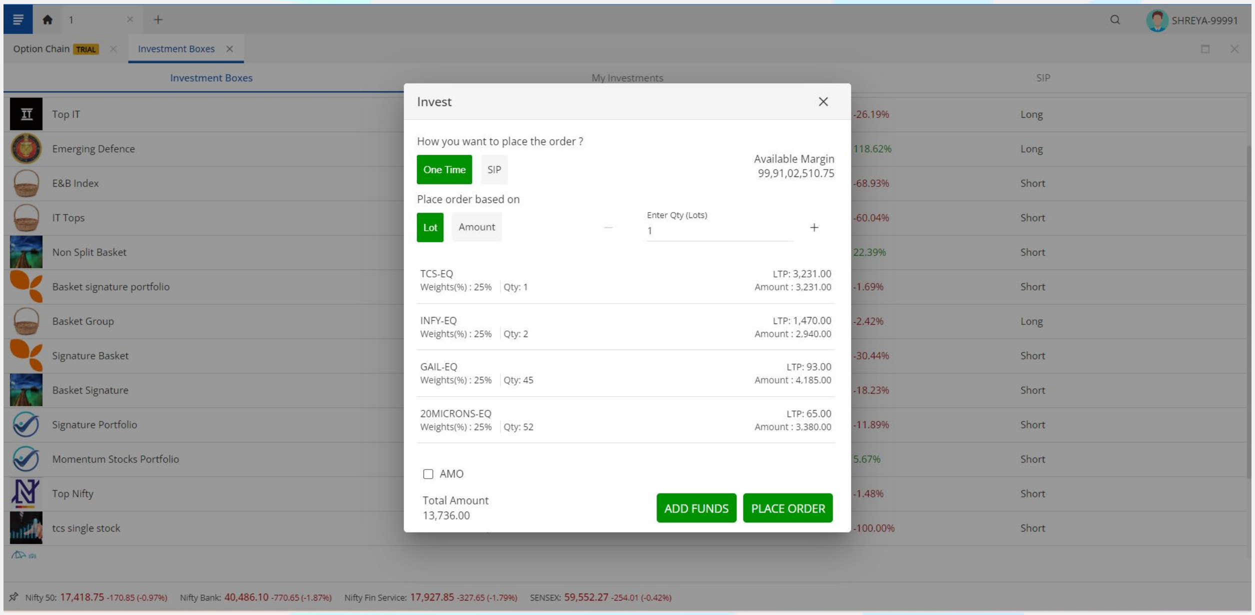


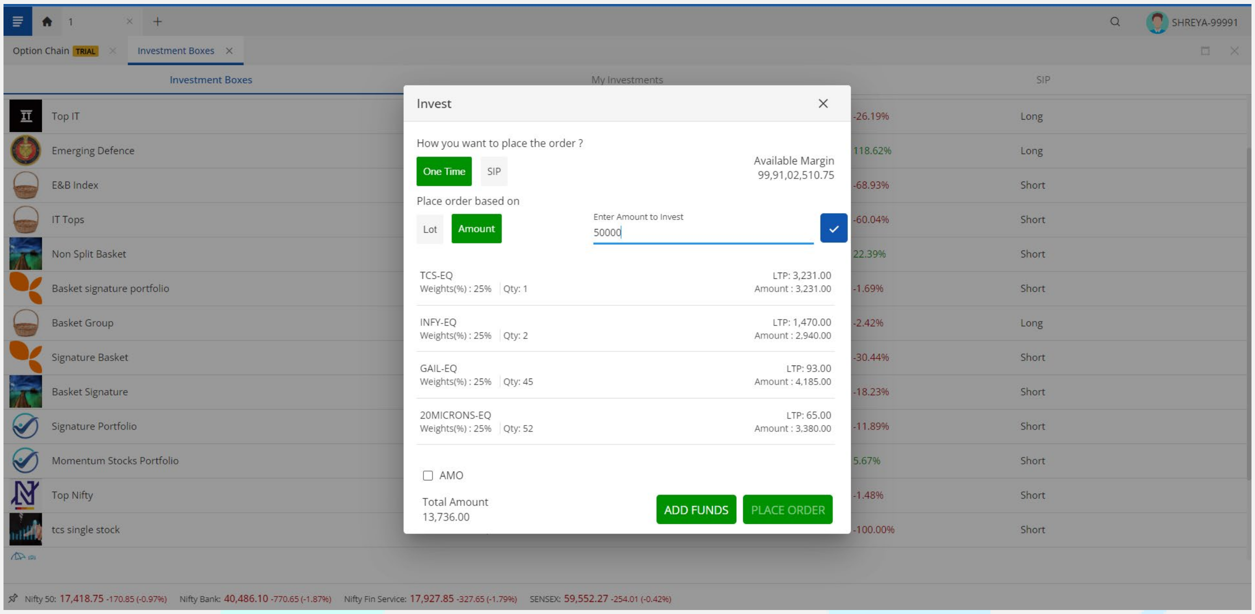
Users can select the Investment Box of their choice and invest. Investment Box is a basket of stocks,and on a single click basket order is placed with a list of stocks under it.



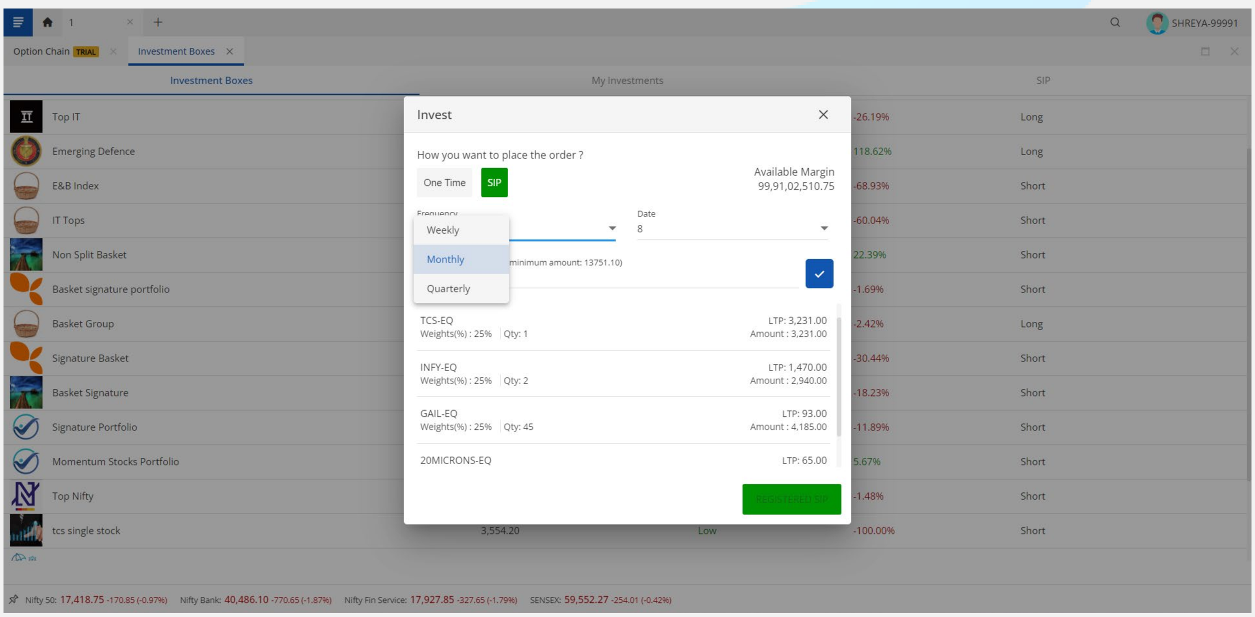


Before placing an order, users can view details related to the Investment Box. Users can also view the list of stocks.

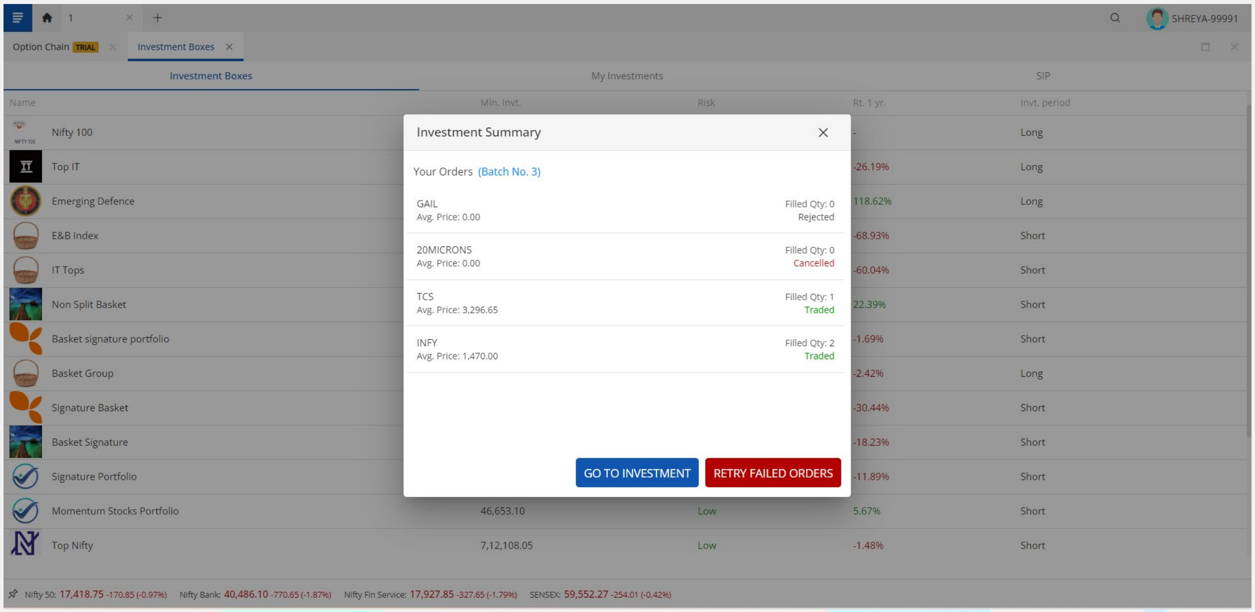




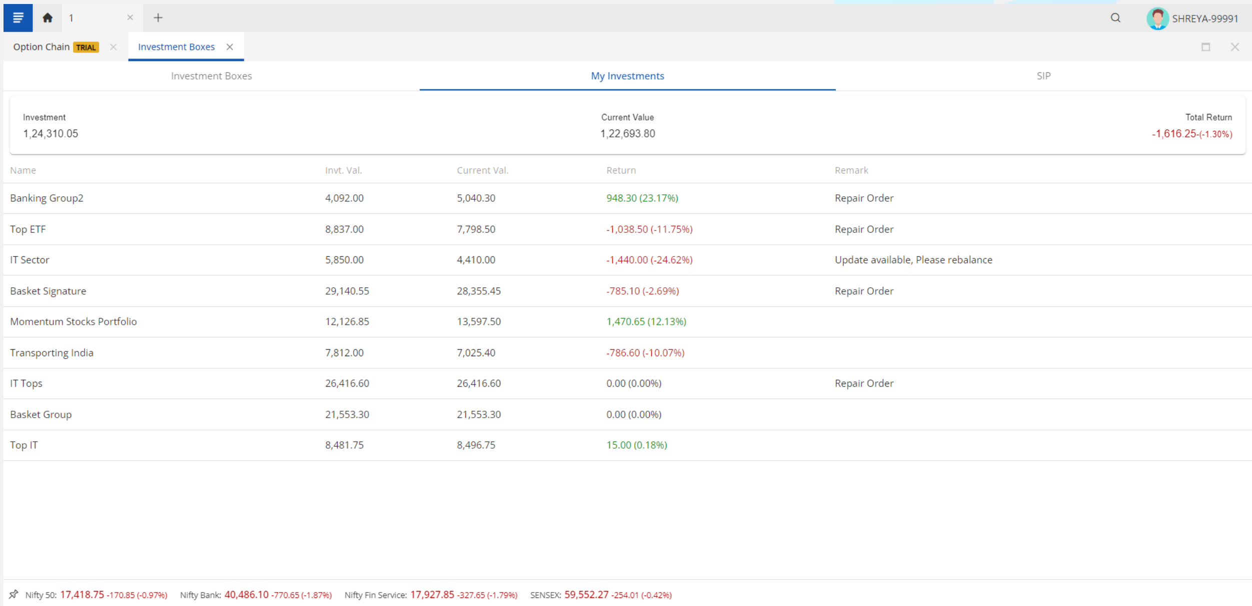
Users can Invest in Lots (Amount for each Lot Indicated) or can enter the amount that they want to invest and place a basket order.



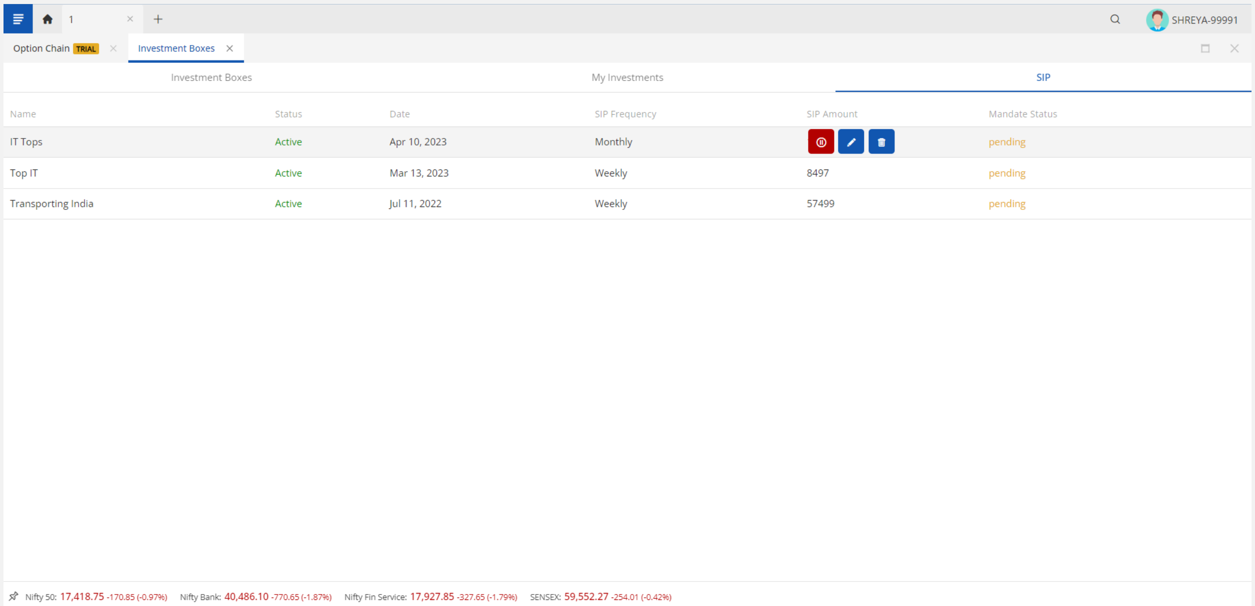
Users can choose to Create a SIP and decide on the Investment cycle and dates. SIP is set as a one time effort and the Investment Orders will be triggered even if the user is not logged in on the due date.



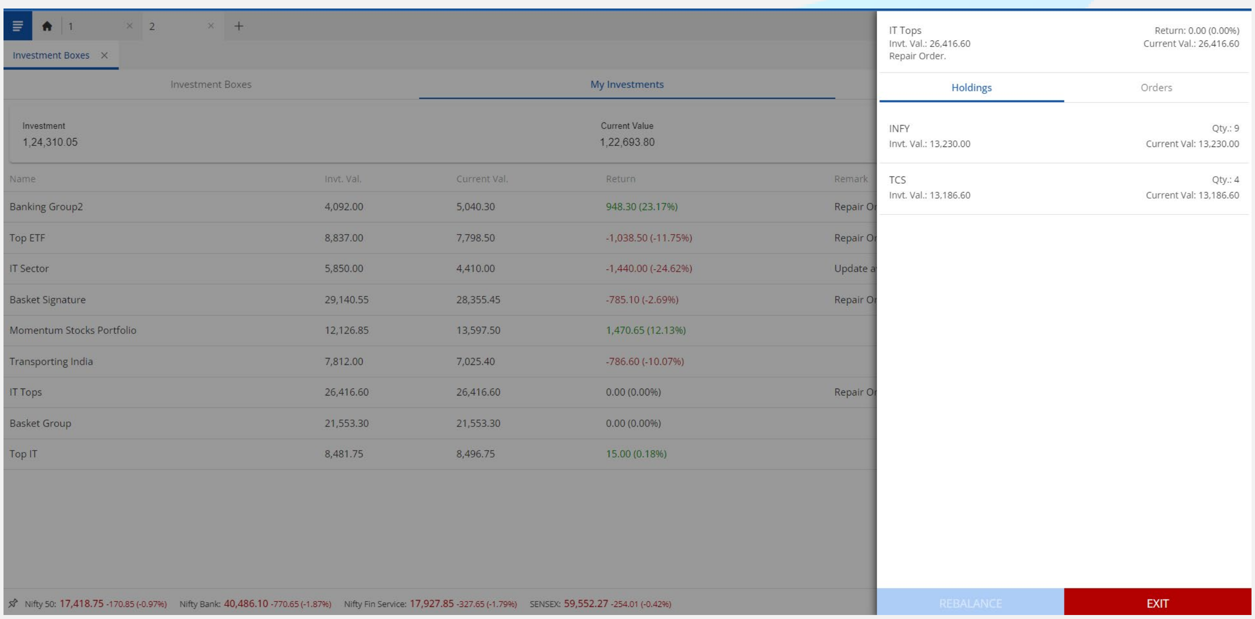
Once order is placed, order status is shown on this page. If any order is failed, users get an option to Retry Failed Orders.



Under this section users can track investments that they have made.



This section displays details of users SIP's and also has options to Pause , Update or Delete the SIP.



Detail related to any investment under any Investment Box is provided on this page.

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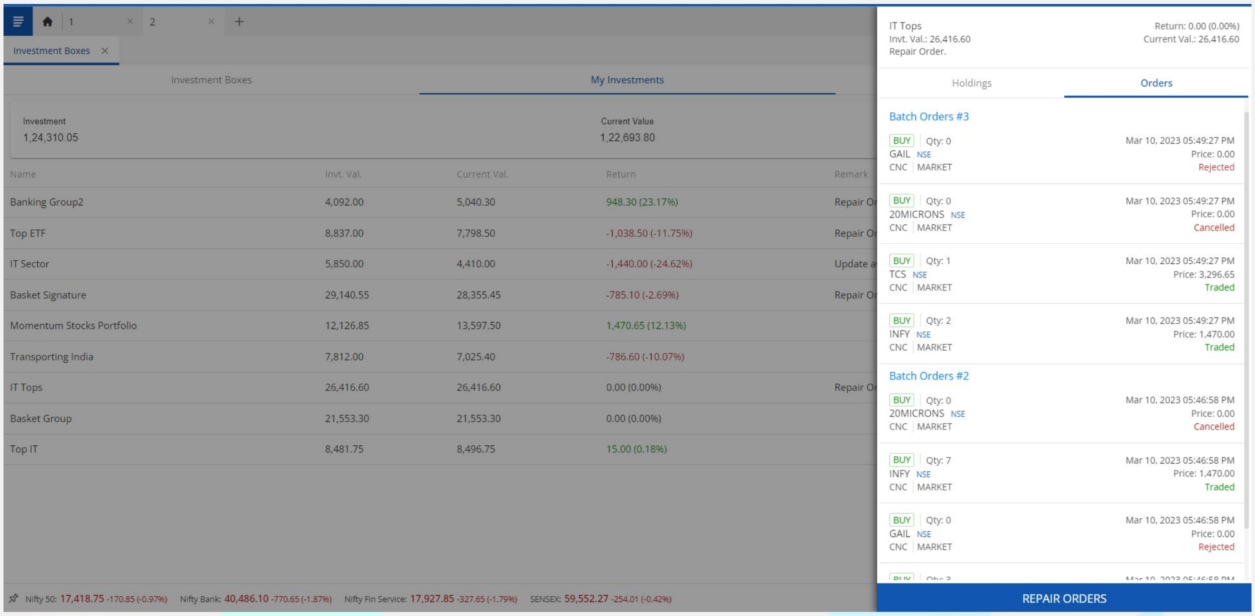
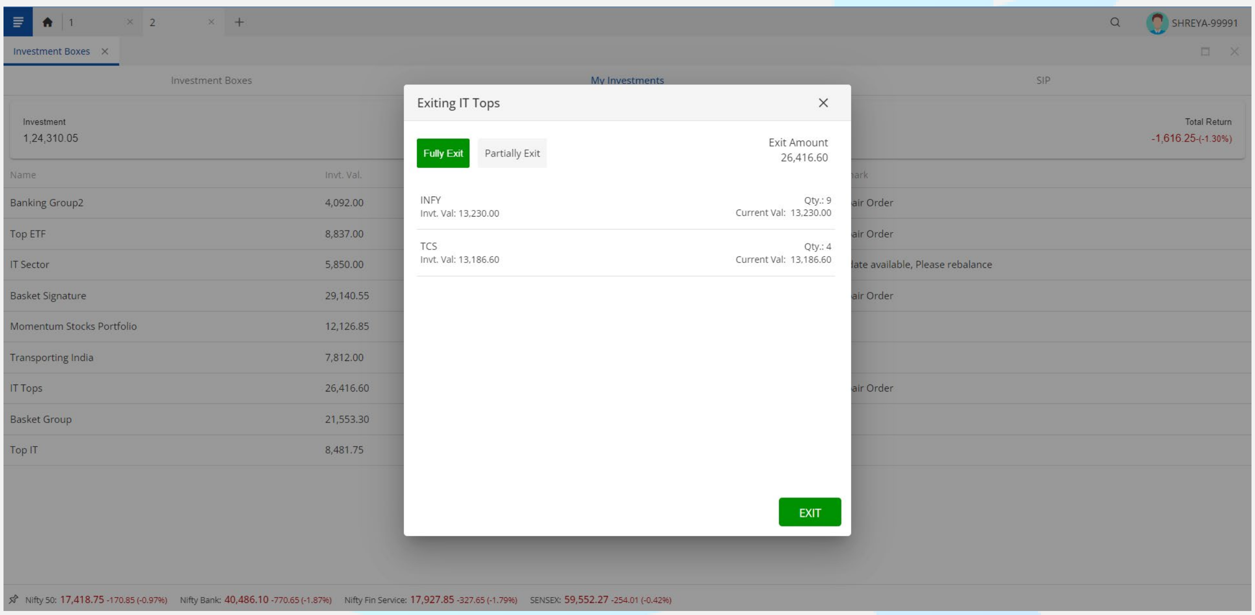
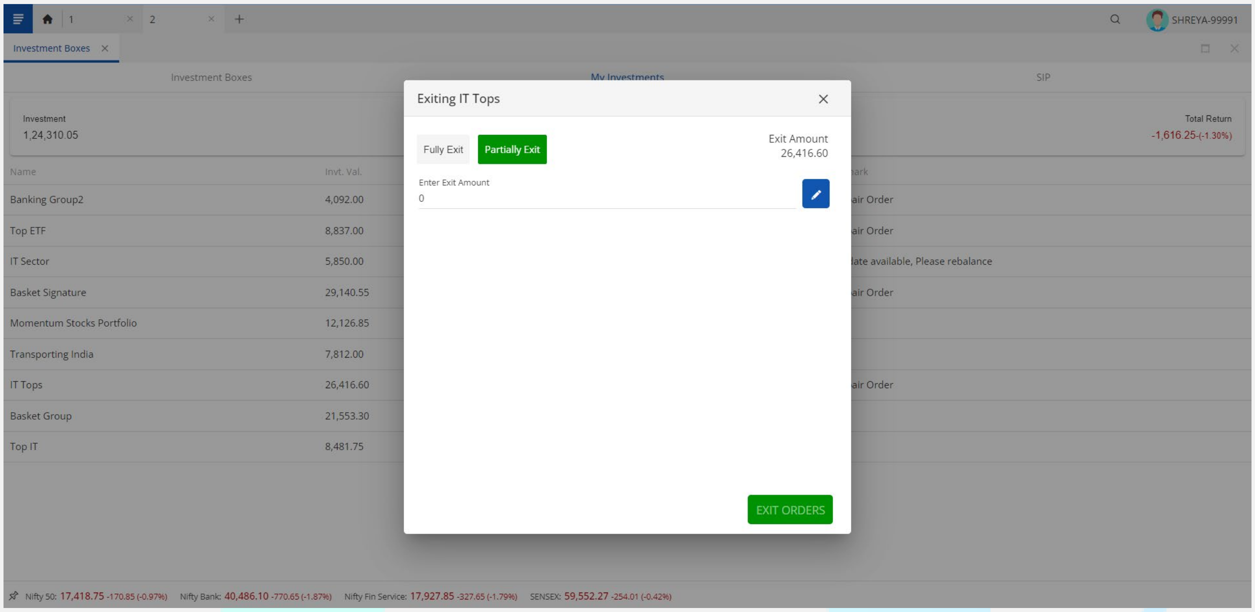
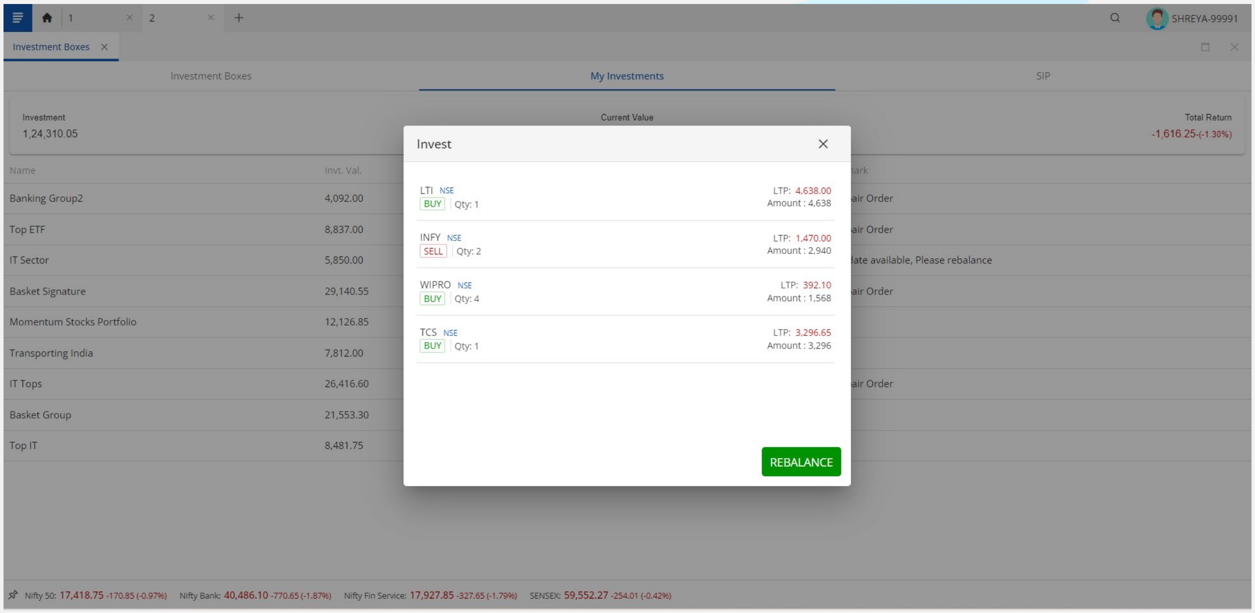


Users can view all orders placed under an Investment Box on this page.



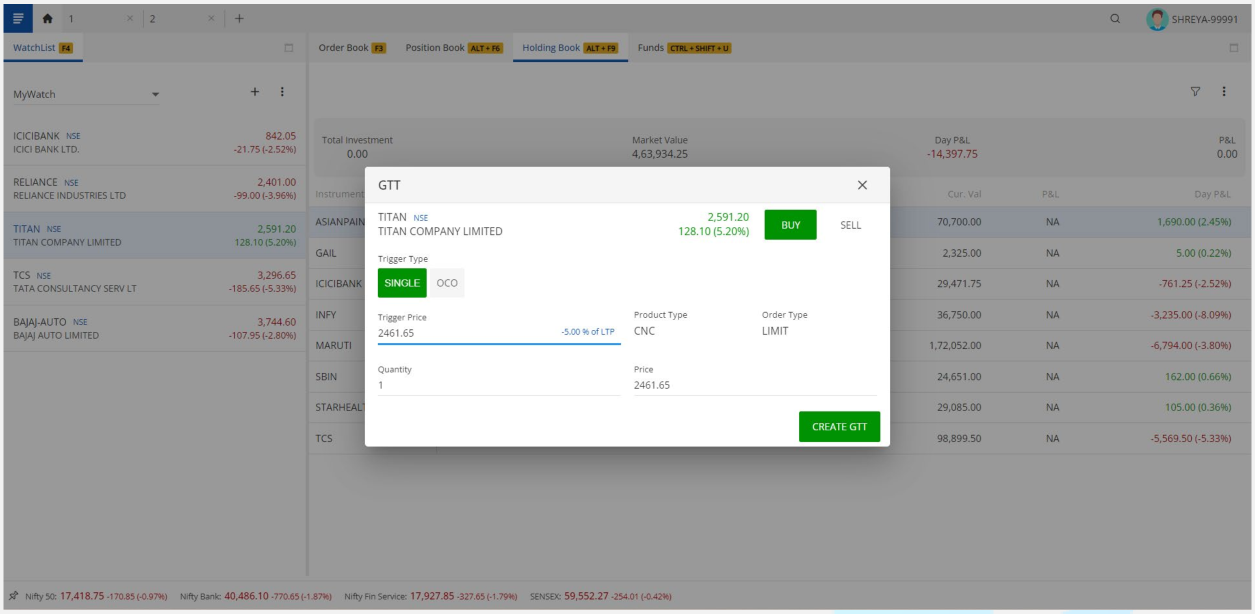


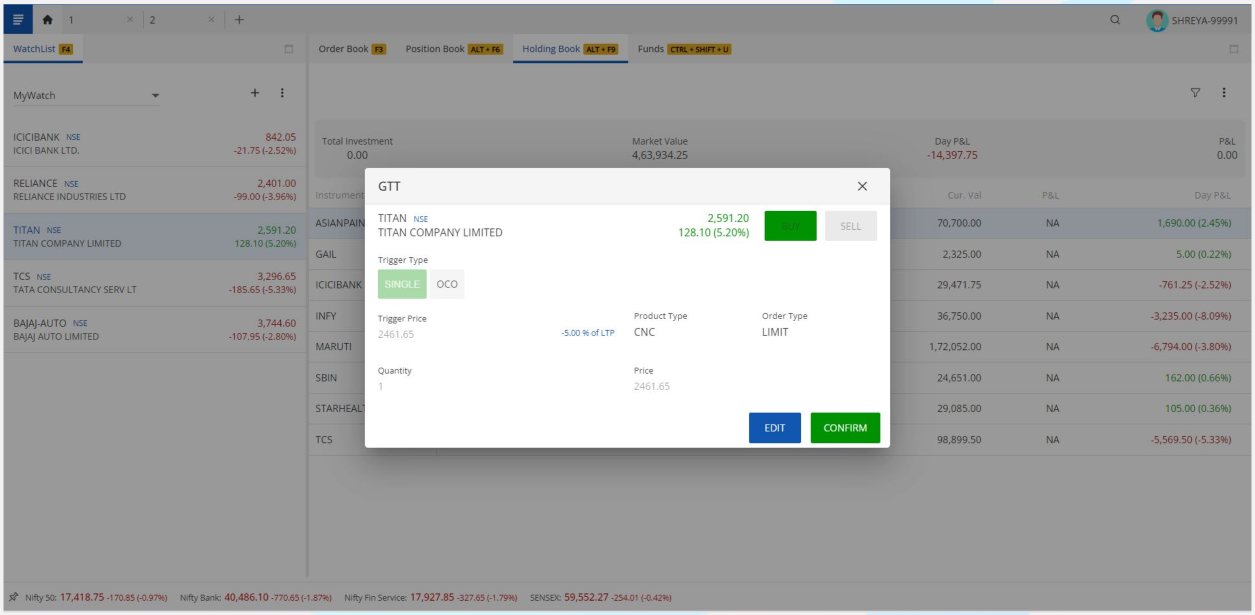
If the user wants to exit from the Investment Box and sell all stocks or exit partially, Exit button will allow the user to sell holdings under this Investment Box.



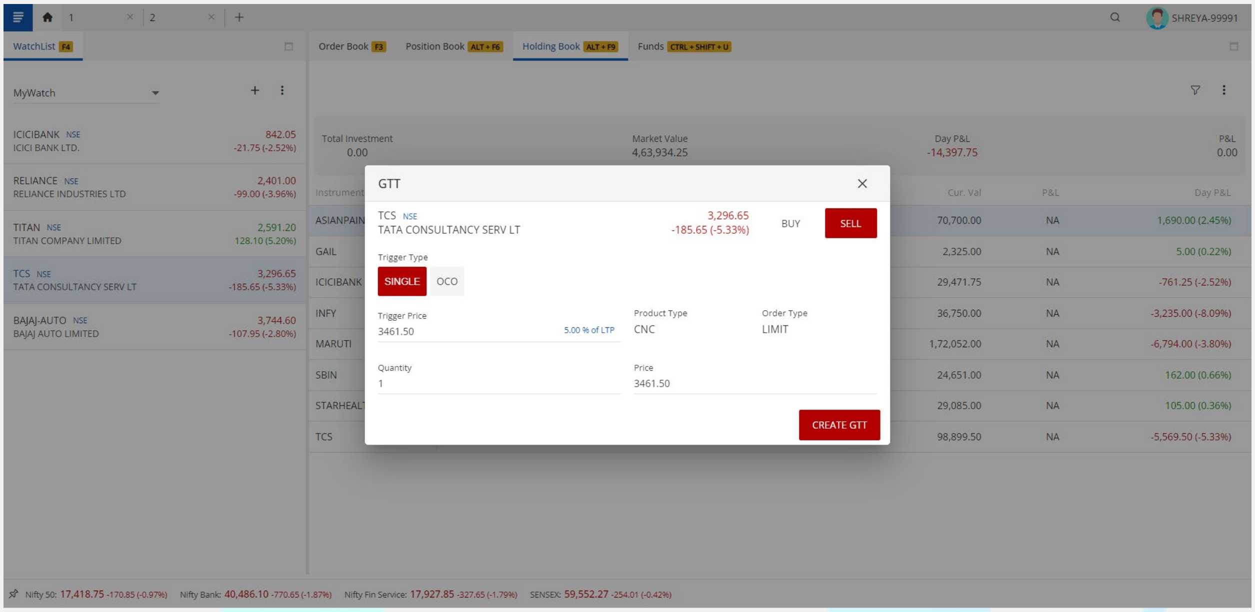
If Admin makes any rebalancing in any Investment Box, this button again balances the Investment Box by buying or selling a few stocks.

13. GTT and OCO

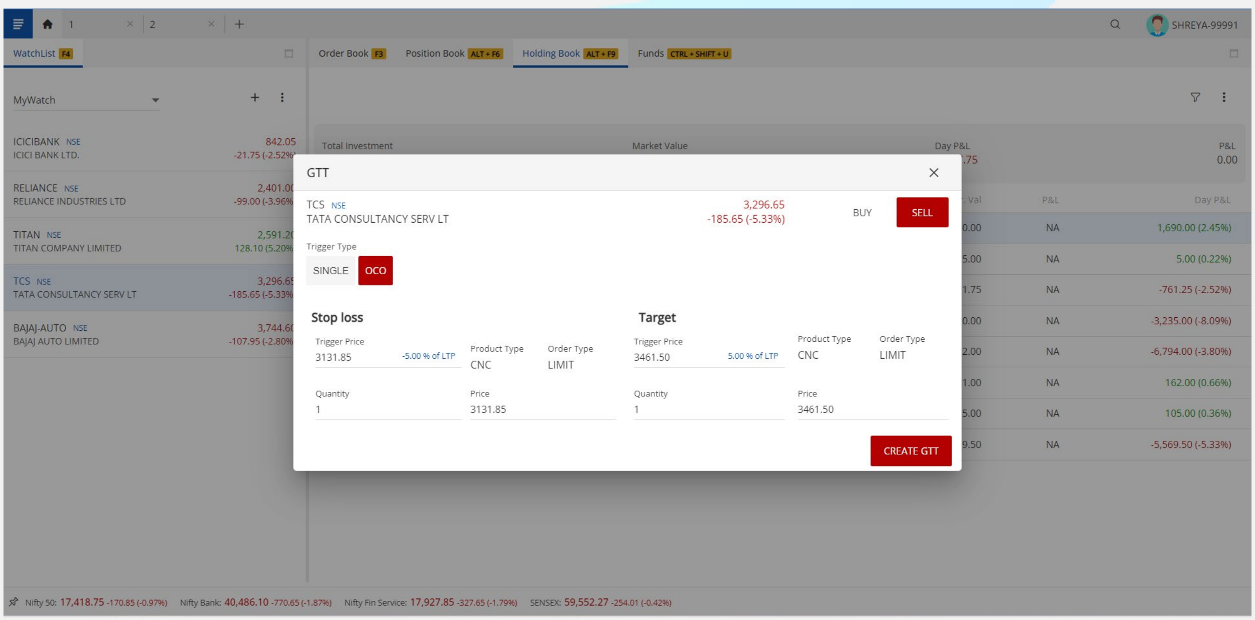


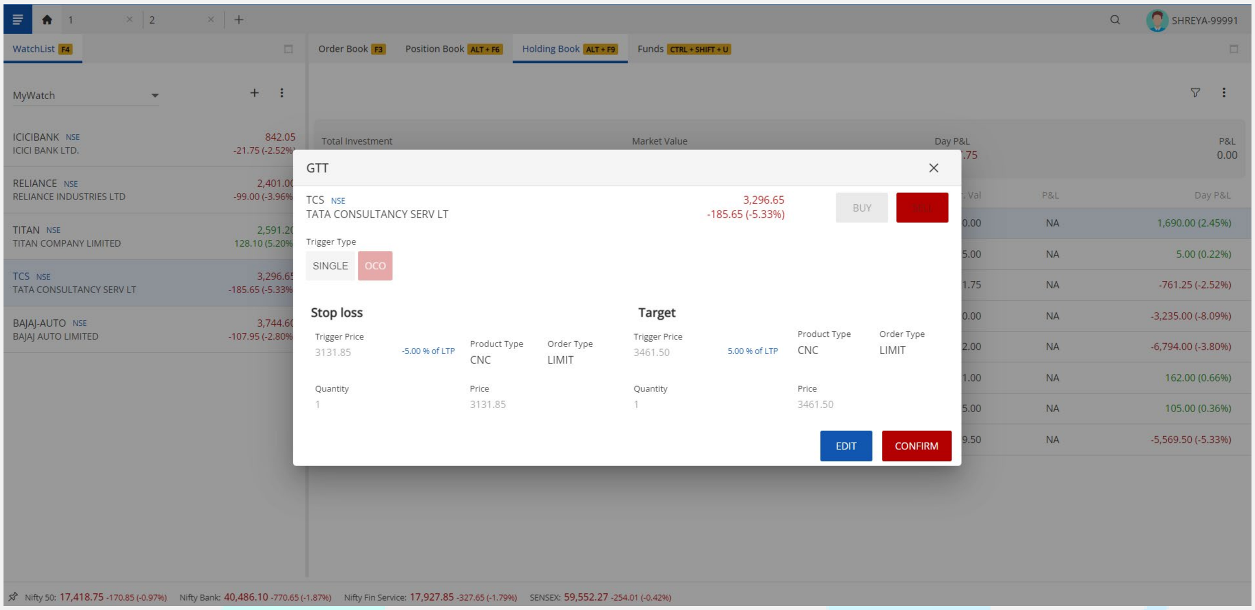


Users can Create GTT orders for Buy Orders from the Watch List or Stock Search. GTT Orders will be active until the trigger conditions are met or for 365 days.

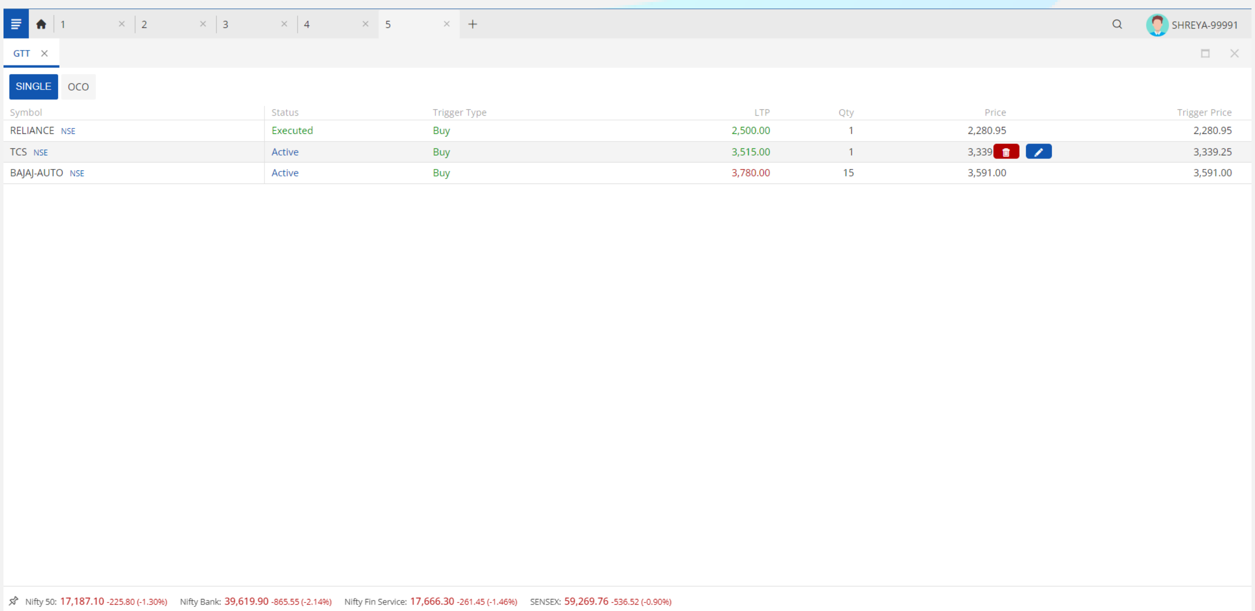


Users can Create GTT orders for Sell Orders from the Watch List or Stock Search. GTT Orders will be active until the trigger conditions are met or for 365 days.

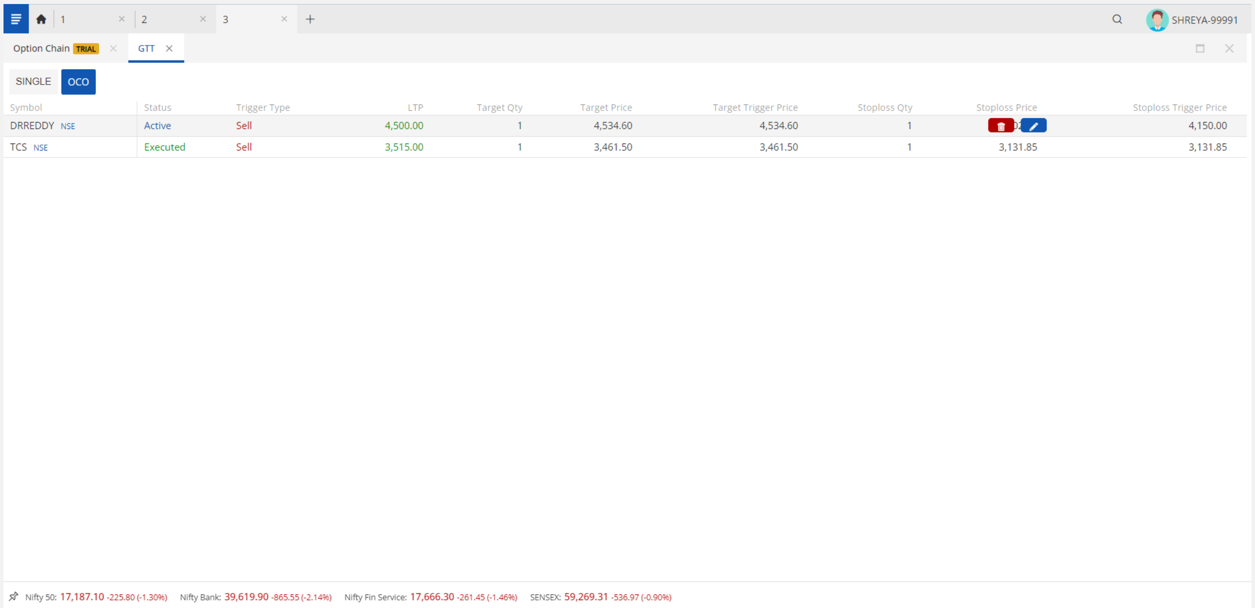




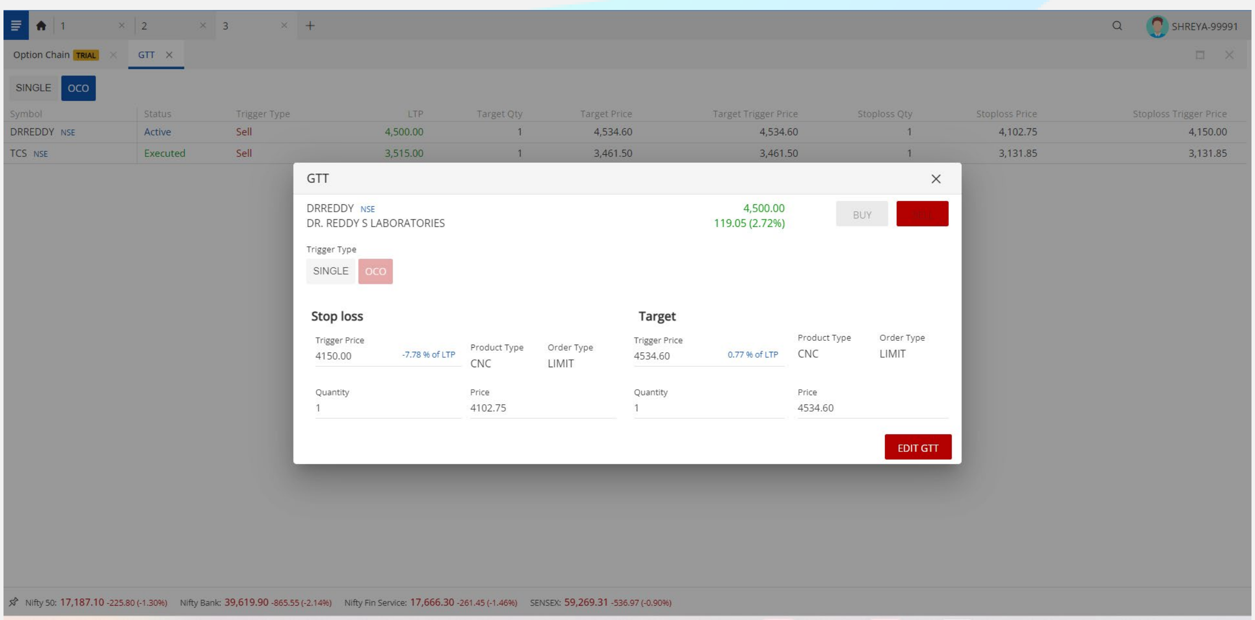
Users can create OCO Orders for Sell Orders from the Watch List or Stock Search. Orders will be active until the trigger conditions are met or for 365 days.



SingleTrigger GTT Created can be viewed, modified or deleted in the GTT feature of Mega Menu



OCO Created can be viewed, modified or deleted in the GTT feature of Mega Menu.



GTT and OCO Orders can be edited and saved before they are executed.

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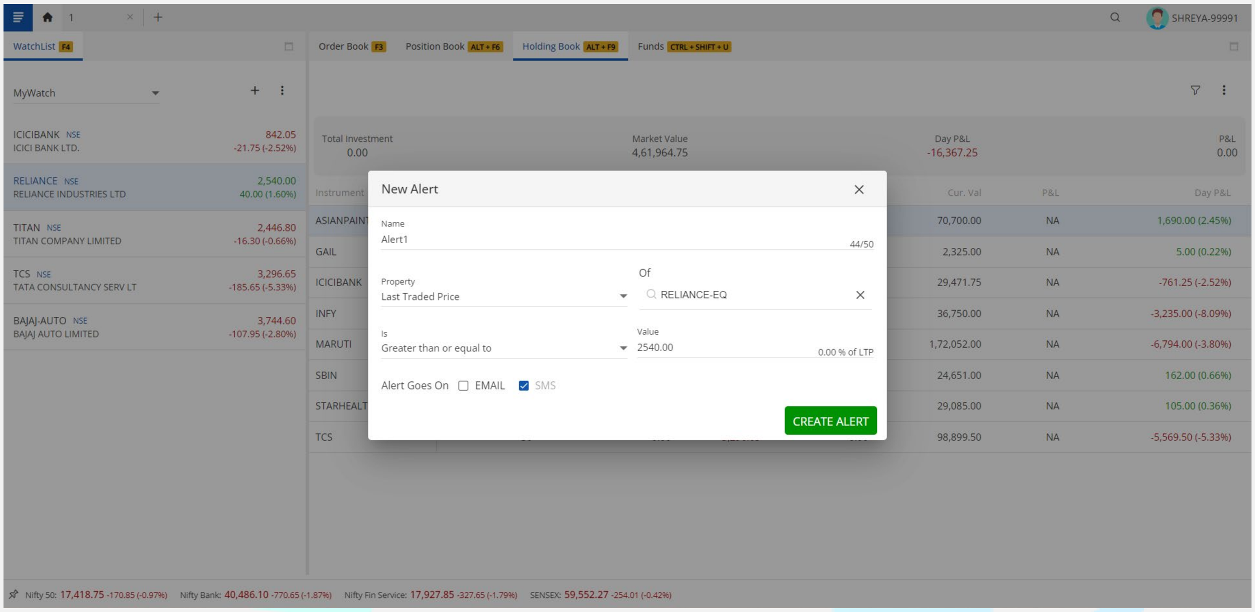
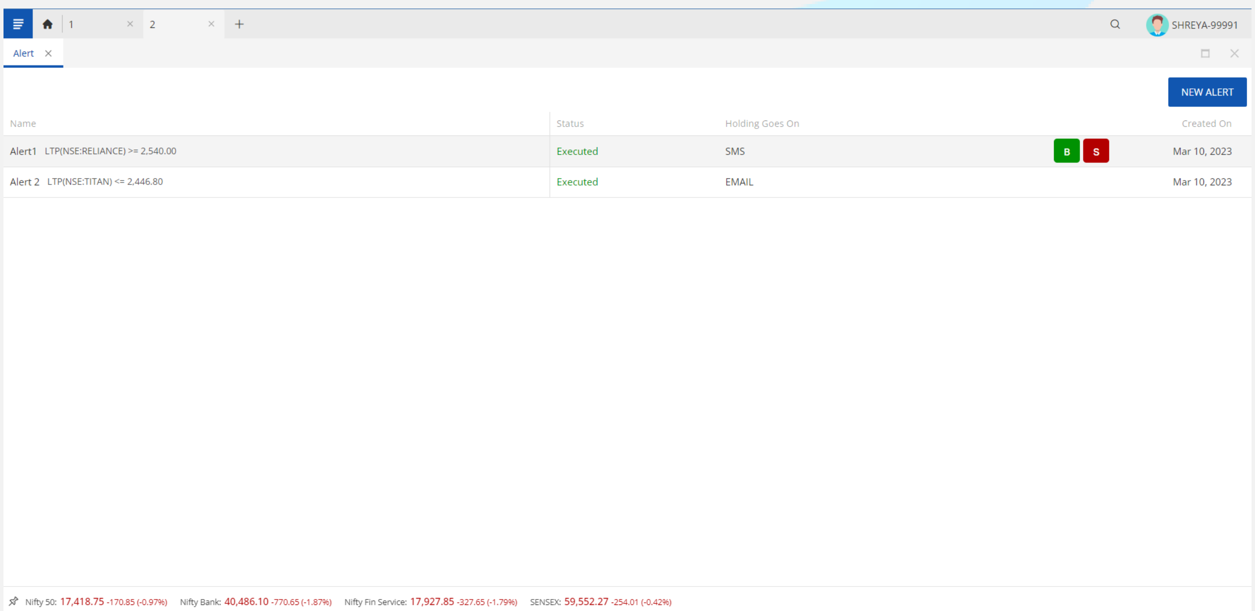
14. Price Alerts



Price Alerts can be created from the Watch List or Stock Search. User can choose Email or SMS or both to receive the Alert.



User can view Price Alerts in the Alert Feature in the Mega Menu. Buy and Sell Orders can be placed from this Window.

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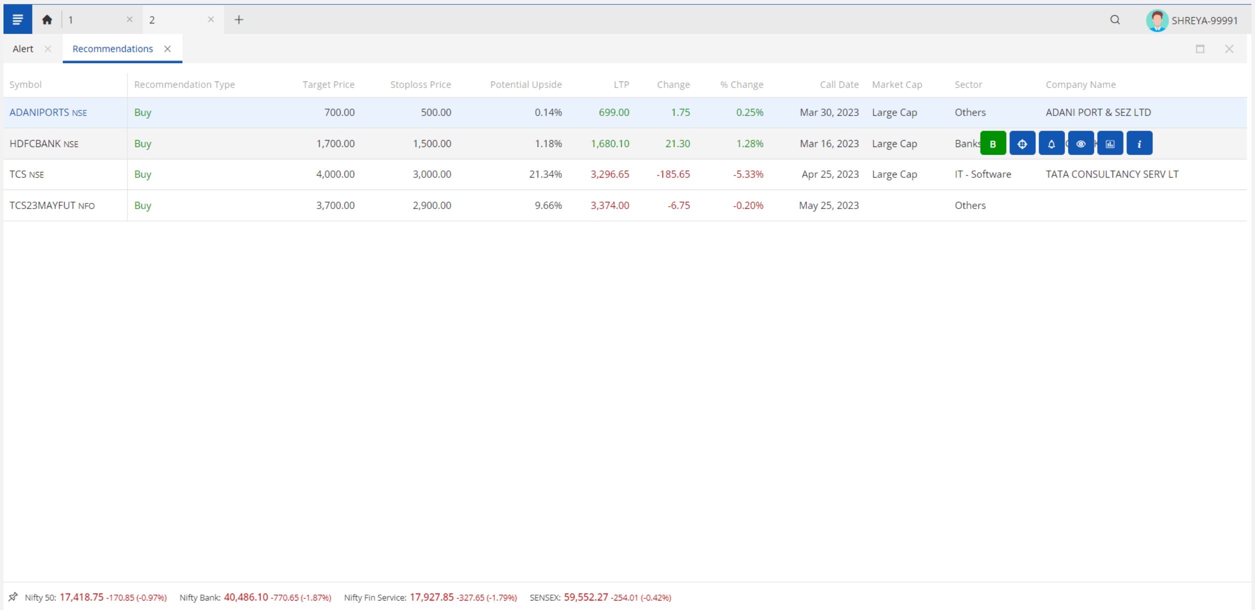
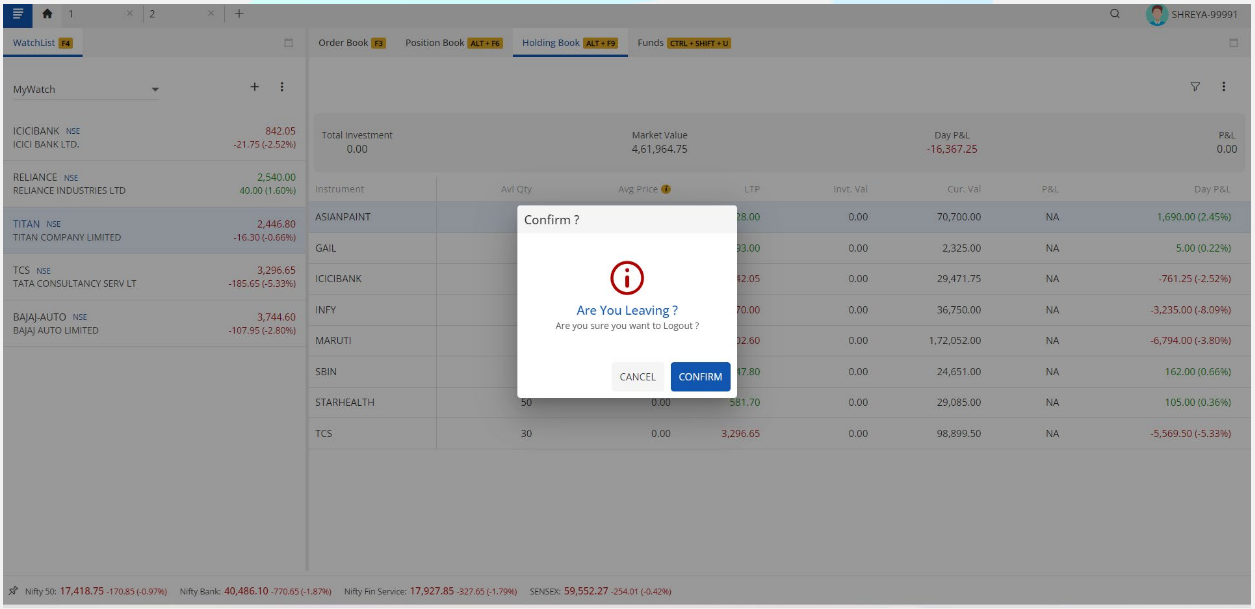
15. Recommendations



Recommendations Feature in the Mega Menu gives access to recommended Stock and includes features like Buy, Create GTT, Create Alerts , Add to Watch List , View Chart and Stock Details.

16. Logout



This is the logout popup upon clicking the confirm button the user will be logged out from the application.