

## Instructions for Schwab Trader API Data (Updated 6/11/2024)

Please ensure that you AbleTrend and Windows Operating system are running the latest version.

1. When you start the AbleTrend, click Data Module first, then click the dropdown menu and find the selection for Schwab. Then click Test

Please choose a data feed module:

AbleData  
Ablesys  
Ablesys\_EOD  
AMTD2  
Esignal  
Schwab

Add

User Credential

User Name  
Password

Network

Host  
port 0

Servers

Remove Test

OK

Once you make your selection, you can click OK, leaving username/password blank.

2. The new Schwab Trader API is authenticated with a token that is generated from the Charles Schwab website. When you click OK or Test, two windows will pop up. Follow the steps below until you get two green lights in the lower right corner of AbleTrend

charles SCHWAB

Log In

Login ID

Password

Log in

Forgot Password?

Input login credentials on the Charles Schwab webpage that pops up

### 3. Click Check the box to API Terms & Conditions & Click Continue:

**Charles SCHWAB**

## Trader API End User Terms and Conditions

### Instruction to Grant Access and Agreement to Allow Abletrend to Access Your Account and Account Information

Please read the following and provide your agreement to these Trader API End User Terms and Conditions ("Terms and Conditions"). By clicking "Continue," you are instructing Schwab to grant access to your account and Account Information (as defined below) to a Third-Party Application (as defined below) utilizing Schwab's Trader API Program (the "Program"). Schwab may, at any time without prior notice, amend these Terms and Conditions. The current Terms and Conditions are available for your reference on this login page. Your continued use of a Third-Party Application constitutes your acceptance of the changes.

**Your instruction to Schwab.** You are instructing Charles Schwab & Co., Inc. ("Schwab," "we," or "us") to allow one or more third-party applications, the provider of these applications, and their personnel and agents (each a "Third-Party Application") that you designate to access your Schwab account and your Account Information. By instructing us to do this, you agree to these Terms and Conditions, and agree to accept the responsibilities and risks summarized below. We may change, suspend, or cancel your instruction at any time and for any reason.

**Your Agreement to Grant Access.** By instructing us to grant access to your Schwab account, you agree that the Third-Party Application will be able to access your account to place, edit, or cancel orders. You agree that you are solely responsible (financially and otherwise) for all orders and trades placed in your account through or using the Third-Party Application. You further understand and agree that all interactions from a Third-Party Application will be monitored and subject to restrictions based on the nature of the activity at our sole discretion. You understand and agree that Schwab has no responsibility for, and makes no representations regarding, the availability, performance, quality, reliability, or fitness of any Third-Party Application, and that Schwab's ability to act on account instructions, including order placement, is dependent on the Third-Party Application's availability and fitness for use with the Program. As such, Schwab will not be liable for the unavailability, delay, or failure of the Third-Party Application to process account instructions. Your use of the Third-Party Application relating to your Schwab account is subject to the Schwab Client Agreement, Privacy Notice, and other applicable agreements governing your Schwab account.

**The Third-Party Application Is an Authorized Person.** You understand and agree that by instructing us to grant access to your Schwab account to a Third-Party Application, you are authorizing any activity (including trading activity) that the Third-Party Application undertakes, even if you did not authorize or consent to that activity. You understand and agree that granting access to your Schwab account could potentially expose you to increased privacy and security risks, including fraud and unauthorized transactions, and that Schwab will not be responsible for such activity.

**The Account Information You Will Be Sharing.** For each Schwab account that you instruct us to link to a Third-Party Application, you are granting the Third-Party Application access to your Account Information, which includes, but is not limited to, your holdings, balances, transaction history (such as buys, sells, journals, dividends, commissions and fees, payments, interest, ATM activity, adjustments, deposits, withdrawals, transfers, checks, taxes, and corporate actions), account descriptors, and other account details (collectively, the "Account Information").

You understand and agree that Schwab does not customize the Account Information that a Third-Party Application can access, which means the amount and type of Account Information may be more or less than is required for a particular Third-Party Application to provide the services you are expecting to receive from it.

**You Must Safeguard Your Login Credentials.** You are responsible for maintaining the confidentiality and security of your Login Credentials and for immediately notifying Schwab if you believe the confidentiality or security of the Login Credentials has been compromised. You are responsible for all activities that occur using your Login Credentials, regardless of whether the activities are undertaken by you or someone else. You may not share your Login Credentials with anyone, including with any Third-Party Application.

[Read more](#)

By checking this box, I instruct Schwab to grant access to my Schwab account and Account Information to a Third-Party Application. In providing this instruction, I also understand and acknowledge the risks and limitations described above, including but not limited to the limitations on Schwab's liability for what happens to my Schwab account and Account Information after it has been accessed by a Third-Party Application.

*A token must be generated for each session.  
AbleTrend uses the API only for retrieving streaming price data.*

### 4. Link Schwab Account, API requires at least one to be checked, then Continue

**Charles SCHWAB**

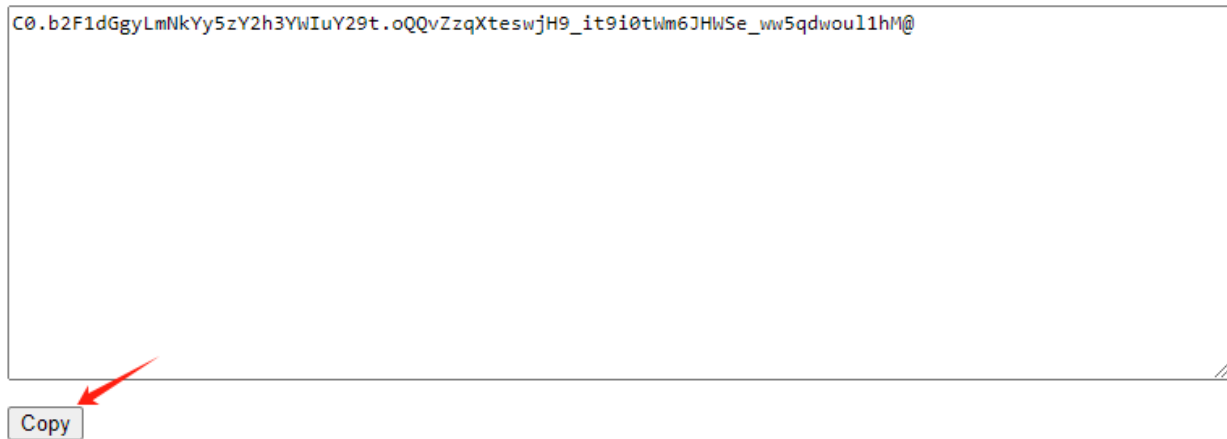
## Select your Schwab accounts to link

Select your Schwab account to link to Abletrend

Your current Schwab accounts

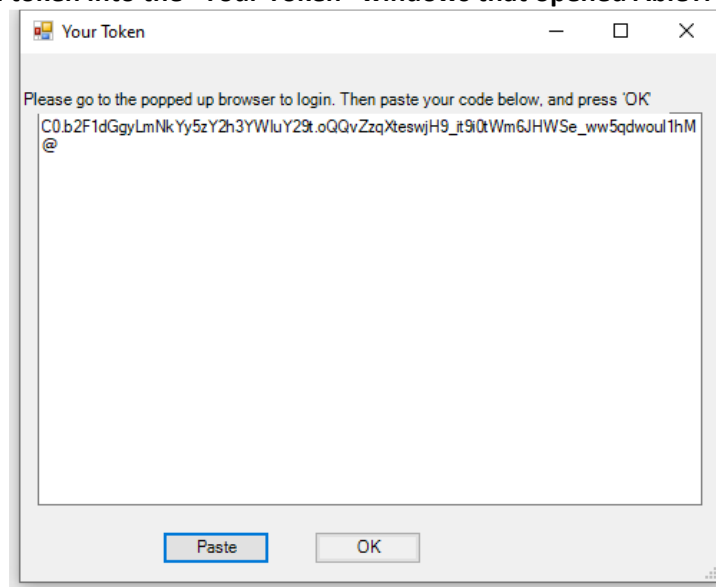
- [Account Name]
- [Account Name]
- [Account Name]

**5. Click the button to copy the session token:**



*There is a button you can click to copy the token below the token field*

**6. Paste the session token into the “Your Token” windows that opened AbleTrend:**

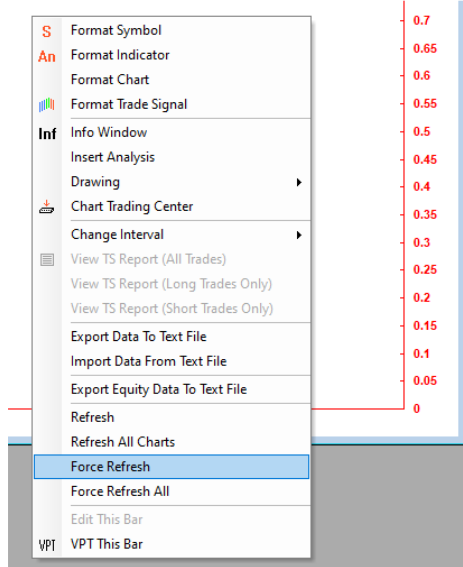


*You will find the box as a separate window that opens with AbleTrend:*

**7. Check for green boxes in the lower right of AbleTrend to confirm that the user authentication is completed:**



**8. If you have windows that opened before the data was connected, you will need to Force Refresh the charts to retrieve the data:**



*Right click on the blank chart & click Force Refresh or Force Refresh All*

**Symbol Guide: Stocks & Futures data must be accessed separately – Attempting to access both types of symbols will cause data to stop streaming, and will require the application to be restarted**

**US Stocks:** just use the symbol e.g. NVDA, MSFT

**Futures:** /SYMBOL continuous contract,

E-mini S&P 500	/ES
E-mini Nasdaq 100	/NQ
E-Mini Dow 30	/YM
E-Mini Russell	/RTY
Gold	/GC
Crude Oil	/CL
10 Year Note	/ZN
30 Year T-Bonds	/ZB
Silver	/SI
Copper	/HG
Corn	/ZC
Soybean	/ZS
Natural Gas	/NG

**Commonly used Indices**

Dow Jones Industrial Average Index	\$DJI
Dow Jones Transportation Index	\$DJT
Dow Jones Utility Index	\$DJU
S&P 500 Index	\$SPX
S&P 100 Index	\$OEX
Nasdaq Composition Index	\$COMPQ
Nasdaq 100 Index	\$NDX
Russell 2000	\$RUT
AMEX Composition Index	\$XAX
OEX Volatility Index	\$VIX