

Migration guide

Why this migration matters to you

We know migrations can feel like extra work, but this one is built to make your life easier. Everything now sits under the **Kotak Neo ecosystem** — no more juggling multiple platforms for docs, keys, or TOTP registration. You also get stronger security, faster performance, and simpler integrations that save time in the long run.

What you'll gain:

This upgrade brings everything into the **Kotak Neo ecosystem**. A small migration now unlocks:

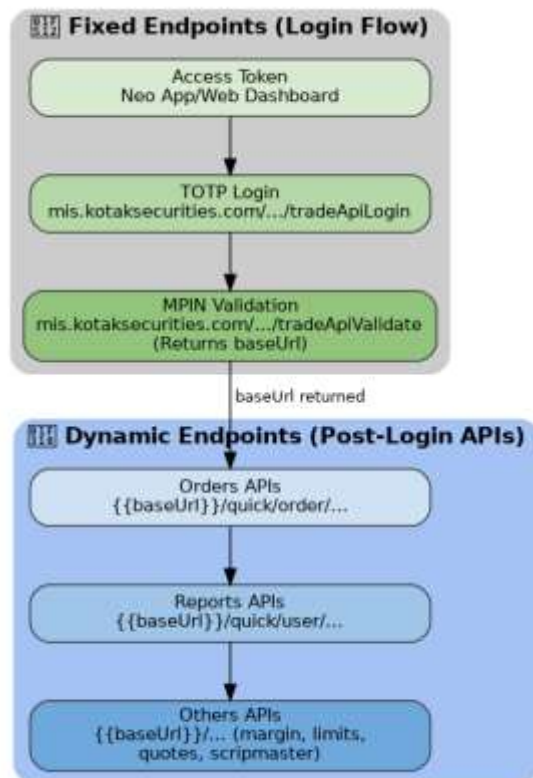
- ⚡ **Fast Order Placement** – order speed in approx. **50ms**.
 - 🔗 **Unified access on NEO app** – APIs, docs, keys, and TOTP in one place.
-

Migration Timeline

- **Parallel Run:** Both versions will work together for sometime, after which older version will be deprecated.
-

Key Changes from integration point of view –

1. **Endpoints of all APIs are changing;** Login APIs have got completely new endpoints and order/reports/other APIs have become dynamic— i.e., they must be called using the **baseUrl** returned after MPIN validation.
2. **Bearer token** to be replaced with plain token (accessible from NEO app/web)
3. **TOTP based login** only valid login method. MPIN validation (2nd step of login process) now returns **baseUrl**



🔑 Step 1: Get Access Token

1. Login to **Neo app/web**.
2. Go to **More tab → TradeAPI card**.
3. Open **API Dashboard** and create an application (if not already done).
4. Copy your **Access Token**.
⚠️ Old /oauth2/token and developer portal (napi.kotaksecurities.com) will be deprecated along with retirement of v1 APIs.

🕒 Step 2: Register TOTP

1. On **API Dashboard**, click **TOTP Registration**.
2. Verify with your **mobile number, OTP, and client code**.
3. **Scan QR code** with Google/Microsoft Authenticator.
4. Enter the generated **TOTP**.
5. Confirm **“TOTP successfully registered”**.
⚠️ Old OTP login (/login/otp/generate) will be deprecated along with retirement of v1 APIs.

API Change Log

Category	API	Old (v1) endpoints	New (v2) endpoints	What You Need to Do
Access Token	Generate Token	/oauth2/token	✗ Deprecated	Get token from Neo app/web dashboard.
Login	OTP Login	/login/1.0/login /otp/generate	✗ Deprecated	Switch to TOTP login.
	Login via TOTP	/login/v6/totp/login	https://mis.kotaksecurities.com/login/1.0/tradeApiLogin	Fixed endpoint. Use plain token (no Bearer) in headers.
	MPIN Validation	/login/v6/totp/validate	https://mis.kotaksecurities.com/login/1.0/tradeApiValidate	Fixed endpoint. Returns baseUrl → must use for remaining API endpoints.
Orders	Place Order	/Orders/2.0/.../place	{{baseUrl}}/quick/order/rule/ms/place	Use baseUrl. Drop 'Authorization' in headers.
	Modify Order	/Orders/2.0/.../modify	{{baseUrl}}/quick/order/vr/modify	Use baseUrl. Drop 'Authorization' in headers.
	Cancel Order	/Orders/2.0/.../cancel	{{baseUrl}}/quick/order/cancel	Use baseUrl. Drop 'Authorization' in headers.
	Exit Cover	/Orders/2.0/.../co/exit	{{baseUrl}}/quick/order/co/exit	Use baseUrl. Drop 'Authorization' in headers.
	Exit Bracket	/Orders/2.0/.../bo/exit	{{baseUrl}}/quick/order/bo/exit	Use baseUrl. Drop 'Authorization' in headers.
Reports	Order History	/Orders/2.0/.../history	{{baseUrl}}/quick/order/history	Use baseUrl. Drop 'Authorization' in headers.
	Order Book	/Orders/2.0/.../orders	{{baseUrl}}/quick/user/orders	Use baseUrl. Drop 'Authorization' in headers.
	Trade Book	/Orders/2.0/.../trades	{{baseUrl}}/quick/user/trades	Use baseUrl. Drop 'Authorization' in headers.

	Position Book	/Orders/2.0/.../positions	{{baseUrl}}/quick/use/r/positions	Use baseUrl. Drop 'Authorization' in headers.
	Portfolio Holdings	/Portfolio/1.0/.../holdings	{{baseUrl}}/portfolio/v1/holdings	Use baseUrl. Drop 'Authorization' in headers. Response structure also changed.
Others	Check Margin	/Orders/2.0/.../check-margin	{{baseUrl}}/quick/use/r/check-margin	Use baseUrl. Drop 'Authorization' in headers.
	Limits	/Orders/2.0/.../limits	{{baseUrl}}/quick/use/r/limits	Use baseUrl. Drop 'Authorization' in headers.
	Quotes	/apim/quotes/1.0/quotes	{{baseUrl}}/script-details/1.0/quotes/	Use plain token in 'Authorization' header.
	Scripmaster Files	/Files/1.0/.../file-paths	{{baseUrl}}/script-details/1.0/masterscript/file-paths	Use plain token in 'Authorization' header.

We are also updating our T&C for the trade API usage. Refer - <https://bit.ly/3IELfC8>

Download the postman collection of the new APIs. <https://bit.ly/3W4x7oO>