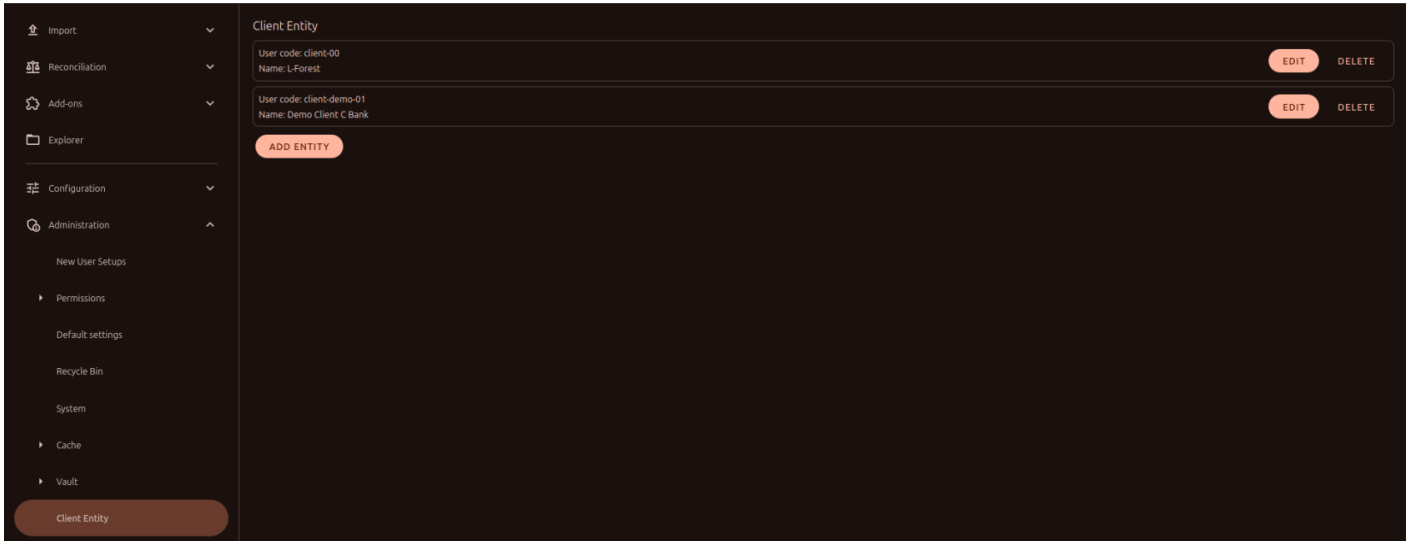



# How to create an Client Entity?

You need to get a new client into the system. To do this, find the item **Client Entity** in the side menu. On the page we can add a new client, or edit an existing one.



Our job is to add client into the system, so we clicked on the *Add Entity* button and a form appeared in front of us with the client's data filled in. Part of the form is reserved for the client's data, and the second part for his API keys.

A screenshot of a 'Create Client Entity' modal form. The form has a title bar with a close button (X). It contains several input fields: Name, Short Name, First Name, Last Name, User Code, Email, and Phone. Below these is a 'Notes' section with a large text area. At the bottom, there is a 'Portfolios' section with a search bar and a dropdown arrow. Below that is a 'Client Secret' section with an 'ADD NEW SECRET +' button. At the very bottom, there are 'CANCEL' and 'CREATE' buttons.

Let's fill out the client data. Fill in the client given and select the portfolios that will belong to it.

### Edit Client Entity

User Code: client-01

Name  
J-Doe

Short Name  
jd

First Name  
Josh

Last Name  
Doe

User Code  
client-01

Email  
J.Doe@bank-c.com

Phone  
+8812345

Notes  
Demo client

Bonds Portfolio  Crypto Portfolio

CANCEL SAVE

We can also immediately fill in the data for the API key of a third-party broker. For example, our client has two portfolios. In two different banks.

**Path to Secret** - path to the vault (with API Key).

**Provider** - name of broker, source, bank, API.

**Portfolio** - Portfolio name (e.g. above I chose *Bonds Portfolio* and *Crypto Portfolio* for the client).

Bonds Portfolio  Crypto Portfolio

### Client Secret

| ID | Path to Secret           | User Code    | Provider | Portfolio        | Notes                       |
|----|--------------------------|--------------|----------|------------------|-----------------------------|
| 15 | finmars/bank-a-access-01 | cs-bank-a-01 | Bank-A   | Bonds Portfolio  | For Access to Bank-A Broker |
| 16 | finmars/bank-b-access-01 | cs-bank-b-01 | Bank-B   | Crypto Portfolio | For Access to Bank-B Broker |

ADD NEW SECRET +

CANCEL SAVE

Once created, the client will be available for editing. For example, we can add a new API to it or modify an existing one.

## Client Entity

User code: client-00  
Name: L-Forest

EDIT DELETE

User code: client-01  
Name: J-Doe

EDIT DELETE

User code: client-demo-01  
Name: Demo Client C Bank

EDIT DELETE

ADD ENTITY

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## Revision #8

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