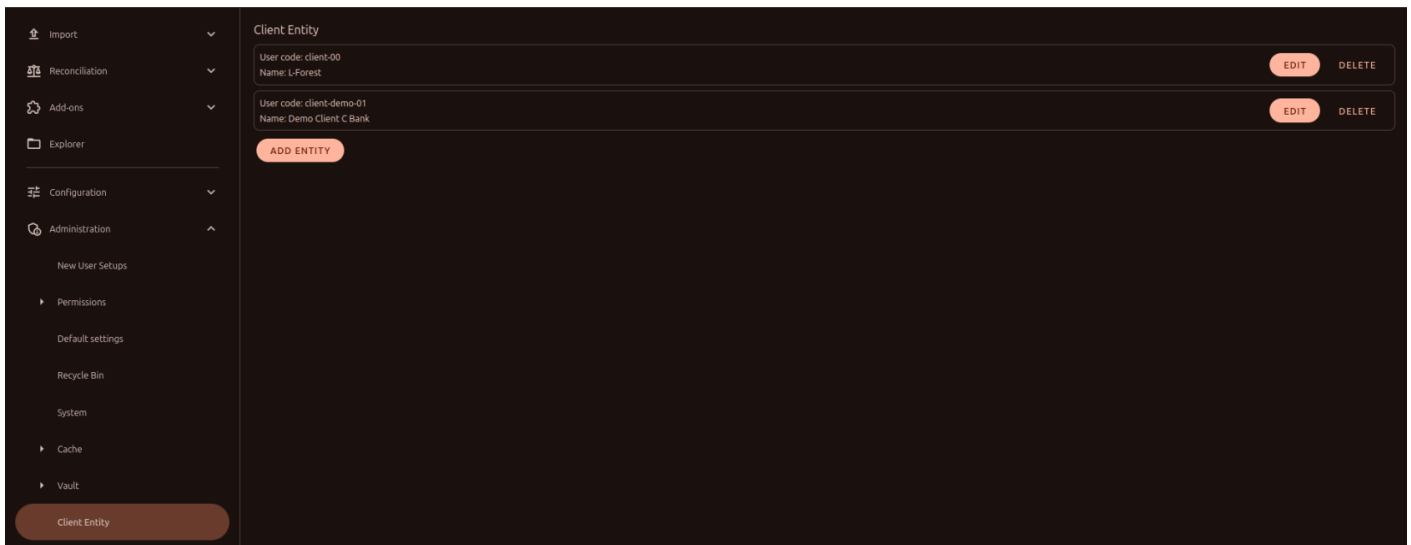


# How to create an Client Entity?

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.

Create Client Entity

Name

Short Name

First Name

Last Name

User Code

Email

Phone

Notes

Portfolios

Client Secret

ADD NEW SECRET +

CANCEL

CREATE

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 PortfolioCrypto 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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