

How to Create a New Module/Package in the Marketplace

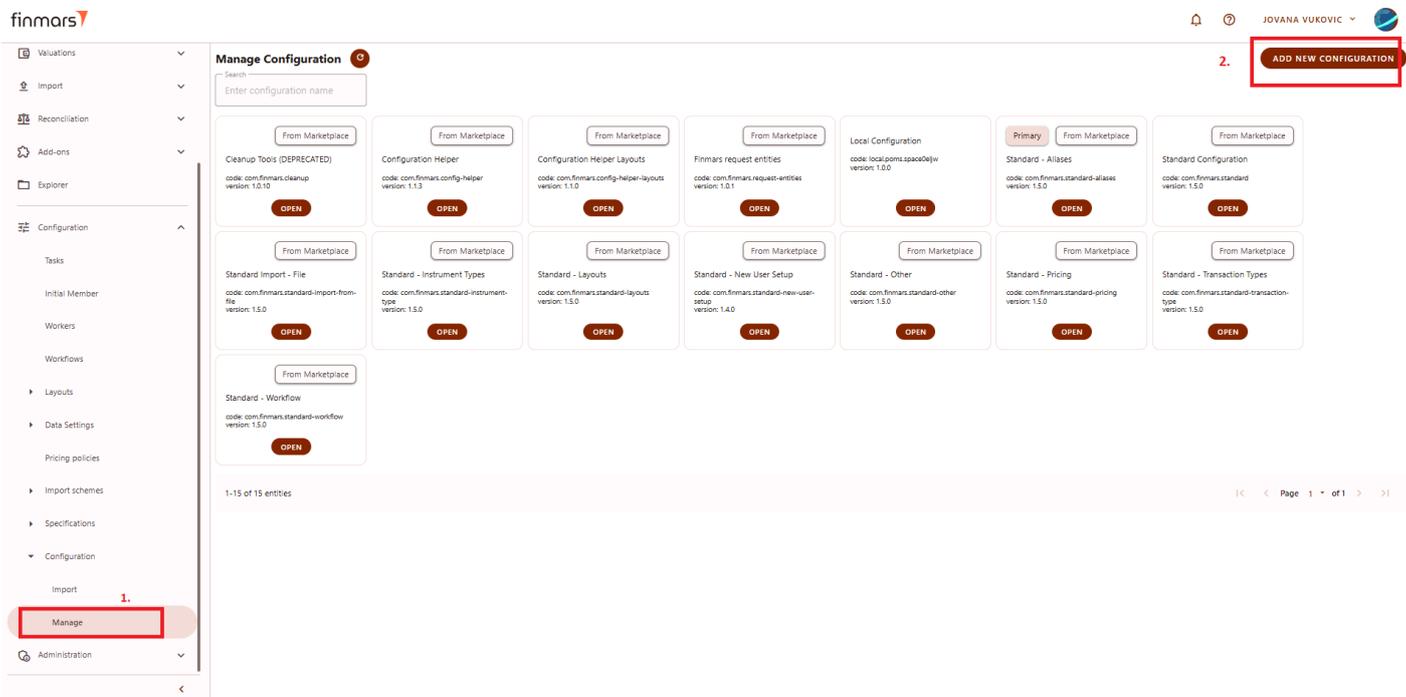
Prerequisites

We assume you have all prerequisites you may need, including:

1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to allow continue with the Action in the Guide
5. Must have: registered in Finmars Marketplace to use credentials to push a module/package

Creating a New Module/Package in the Marketplace

Step 1. Add a new module or package by navigating to **Configuration > Configuration > Manage**. Once there, click the "**Add New Configuration**" button in the top right corner, as shown in the picture below.



Picture 1. Finmars manage configuration

Step 2: After clicking the "Add New Configuration" button, a new window will appear where it's needed to fill in the required fields.

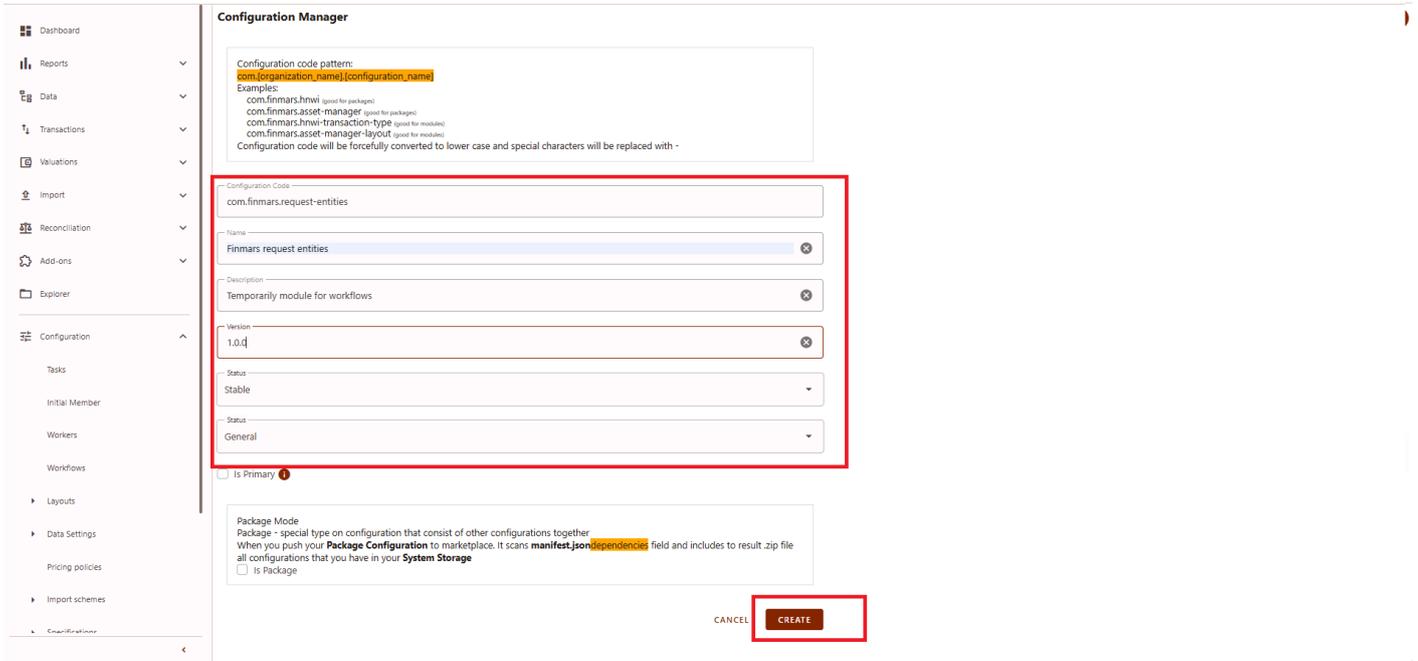
See the example below:

- **Configuration Code:** Enter the configuration code for your module. Follow the configuration pattern that is shown.
- **Name:** Enter the desired module name.
- **Version:** Add the version.
- **Status:** Choose between "Stable" or "Release Candidate."
- **Category:** Select from "General," "UI," "Pricing," or "Workflow." Choose "General" if unsure.

*** The 'Is Primary' checkbox indicates the primary configuration. When this option is enabled, user fields or other related entities should be retrieved from the primary configuration.

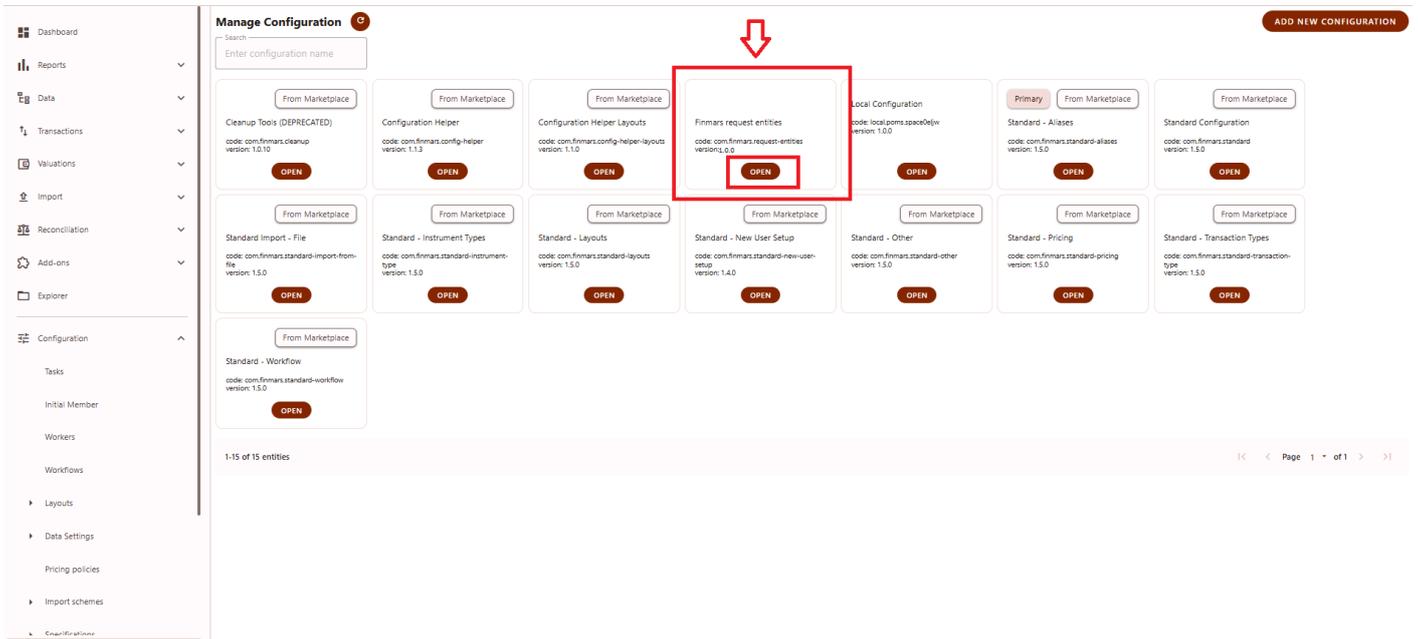
Modules are installable components on the Finmars platform that enhance its functionalities. A Package is a set of modules that will be installed in ordered sequence. To create a package, check the "Is Package" checkbox. If it's a module, leave it empty.

When clicking button "CREATE". The manifest will be created.



Picture 2. Finmars configuration manager

Step 3: To verify if your module has been created, go to the manage configurations and check if your package/module is created.

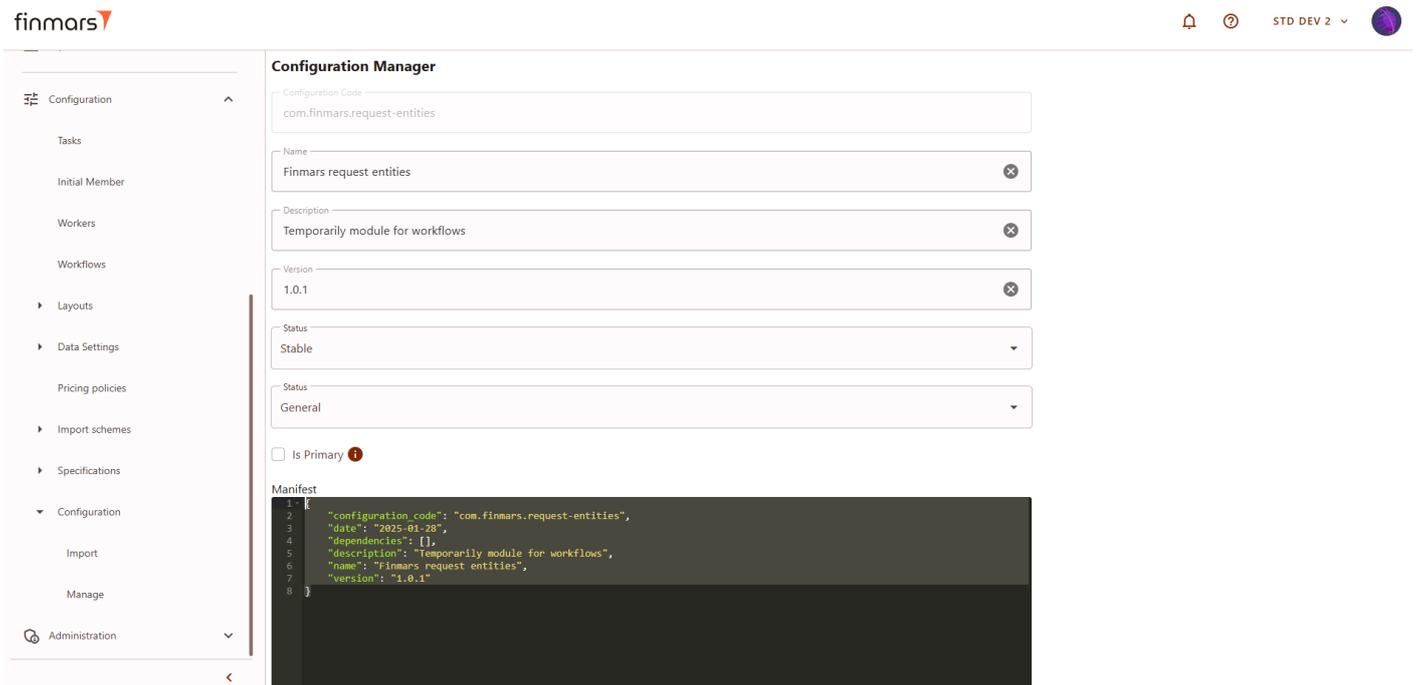


Picture 3. Locally created module

Step 4: Before pushing newly created module/package you need to make sure that the administrator of the Finmars Marketplace has created the same module/package in the Finmars Marketplace, otherwise you will have error pushing the module/package.

For the administrator of the Finmars Marketplace to correctly create a new module/package:

1. Open the newly created module/package in the the manage configurations page
2. Creating the module also generates the manifest JSON file. Copy that manifest JSON.
3. Sent it to the administrator of the Finmars Marketplace



Picture 4. Manifest of the created module

Step 5: If you are the administrator of the Finmars Marketplace

1. Request/receive from the module/package creator the Manifest content/ For example like:

```
{
  "configuration_code": "com.finmars.request-entities",
  "date": "2025-01-28",
  "dependencies": [],
  "description": "Temporarily module for workflows",
  "name": "Finmars request entities",
  "version": "1.0.1"
}
```

2. Go to <https://marketplace.finmars.com/admin/> and login with your credentials
3. Go to <https://marketplace.finmars.com/admin/marketplace/configuration/> and make sure that this configuration hasn't been already created (search)
4. If the configuration hasn't been created click on the **"Add Configuration +"** button in the right upper corner:

Marketplace Admin

Home > Marketplace > Configurations

Start typing to filter...

AUTH TOKEN

Tokens + Add

AUTHENTICATION AND AUTHORIZATION

Groups + Add

FINMARS_IAM

User Access Policies + Add

MARKETPLACE

Configuration Releases + Add

Configurations + Add

Members + Add

Organizations + Add

Private Finmars Installations + Add

Users + Add

Select Configuration to change

Action: [dropdown] Go 0 of 81 selected

ID	CONFIGURATION CODE	NAME	ORGANIZATION	CREATED	MODIFIED
<input type="checkbox"/>	1	com.finmars	finmars (Finmars)	April 15, 2023, 11:08 a.m.	April 24, 2023, 2:28 p.m.
<input type="checkbox"/>	9	com.finmars	finmars (Finmars)	May 5, 2023, 2:08 p.m.	Feb. 14, 2025, 2:35 p.m.
<input type="checkbox"/>	10	com.finmars	finmars (Finmars)	May 5, 2023, 4:20 p.m.	Feb. 14, 2025, 2:36 p.m.
<input type="checkbox"/>	11	com.finmars	finmars (Finmars)	May 5, 2023, 4:20 p.m.	Sept. 25, 2024, 9:12 p.m.
<input type="checkbox"/>	12	com.finmars	finmars (Finmars)	May 5, 2023, 4:20 p.m.	Feb. 14, 2025, 2:36 p.m.
<input type="checkbox"/>	13	com.finmars	finmars (Finmars)	May 5, 2023, 4:21 p.m.	Feb. 14, 2025, 2:36 p.m.
<input type="checkbox"/>	14	com.finmars	finmars (Finmars)	May 12, 2023, 2:45 p.m.	Feb. 14, 2025, 2:37 p.m.
<input type="checkbox"/>	15	com.finmars	finmars (Finmars)	May 12, 2023, 2:45 p.m.	Feb. 14, 2025, 2:36 p.m.
<input type="checkbox"/>	16	com.finmars	finmars (Finmars)	May 12, 2023, 2:46 p.m.	Feb. 14, 2025, 2:37 p.m.
<input type="checkbox"/>	17	com.finmars	finmars (Finmars)	May 17, 2023, 7:46 p.m.	Aug. 19, 2024, 7:50 a.m.
<input type="checkbox"/>	18	com.finmars	finmars (Finmars)	May 18, 2023, 9:29 a.m.	Feb. 11, 2025, 12:58 p.m.
<input type="checkbox"/>	19	com.finmars	finmars (Finmars)	May 18, 2023, 11:31 a.m.	Feb. 4, 2025, 12:11 p.m.
<input type="checkbox"/>	20	com.finmars	finmars (Finmars)	May 18, 2023, 11:32 a.m.	July 3, 2024, 1:04 p.m.
<input type="checkbox"/>	21	com.finmars	finmars (Finmars)	May 18, 2023, 11:32 a.m.	July 29, 2024, 11:31 a.m.
<input type="checkbox"/>	22	com.finmars	finmars (Finmars)	May 18, 2023, 11:33 a.m.	April 22, 2024, 3:16 p.m.
<input type="checkbox"/>	23	com.finmars	finmars (Finmars)	May 18, 2023, 11:33 a.m.	Aug. 16, 2024, 2:47 p.m.
<input type="checkbox"/>	24	com.finmars	finmars (Finmars)	May 29, 2023, 11:01 a.m.	April 22, 2024, 3:34 p.m.
<input type="checkbox"/>	25	com.finmars	finmars (Finmars)	May 29, 2023, 11:01 a.m.	April 22, 2024, 2:20 p.m.
<input type="checkbox"/>	26	com.finmars	finmars (Finmars)	June 2, 2023, 5:26 p.m.	Nov. 7, 2023, 9 p.m.
<input type="checkbox"/>	27	com.finmars	finmars (Finmars)	June 2, 2023, 5:27 p.m.	Sept. 5, 2024, 10:27 a.m.
<input type="checkbox"/>	28	com.finmars	finmars (Finmars)	June 2, 2023, 5:27 p.m.	Oct. 31, 2023, noon

ADD CONFIGURAT

FILTER

By Name

All

5. Fill in all the needed information from the Manifest (it's a must to have the same info in the Configuration Code) and click on "**Save**" button:

Marketplace Admin

Home > Marketplace > Configurations > Add Configuration

Start typing to filter...

AUTH TOKEN

Tokens + Add

AUTHENTICATION AND AUTHORIZATION

Groups + Add

FINMARS_IAM

User Access Policies + Add

MARKETPLACE

Configuration Releases + Add

Configurations + Add

Members + Add

Organizations + Add

Private Finmars Installations + Add

Users + Add

Add Configuration

Configuration Code: com.finmars.request-entities

Organization: finmars (Finmars)

Author: [dropdown]

Name: Finmars request entities

Description: Temporarily module for workflows

Type: general

Is package

Thumbnail: Choose File No file chosen

Download count: 0

Save and add another Save and continue editing **SA**

Step 6: How to Push a Module/Package to the Marketplace and updating version

Revision #16

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Updated 19 February 2025 22:41:13 by Sergei Osipov