

How to Install/Update a Module/Package from 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

Installing/Updating a Module/Package from Marketplace

Step 1. To install or update a module/package from the Marketplace, go to **Add-ons > Marketplace**. Locate the module you want to install or update.

1. If you want to install **latest stable version** of the module - click install/update on the module card
2. If you want to install **particular version** of the module please refer to step 5.

The screenshot shows the Finmars Marketplace interface. On the left, a sidebar contains navigation links: Dashboard, Reports (Balance, P&L, Transaction, Performance), Data, Transactions, Valuations, Import, Reconciliation, and Add-ons. The 'Add-ons' section is highlighted with a red box. The main area displays a grid of modules, each with an icon, name, code, version, and an action button (Install, Reinstall, Update). The 'Standard - New User Setup' module is highlighted with a red box.

Module Name	Code	Version	Action
Marscapital Instrument Types	code:com.finmars.marscapital-instrument-type	version: 2.0.0	Install
MarsCapital New User Setup	code:com.finmars.marscapital-new-user-setup	version: 2.0.0	Install
MarsCapital Package	code:com.finmars.marscapital	version: 2.0.0	Install
Marscapital Policies	code:com.finmars.marscapital-policy	version: 1.0.0	Install
Marscapital Pricing Schemes	code:com.finmars.marscapital-pricing-scheme	version: 1.0.1	Install
Marscapital Procedures and Schedules	code:com.finmars.marscapital-procedure-schedule	version: 1.0.1	Install
Marscapital Simple Import	code:com.finmars.marscapital-simple-import	version: 1.0.1	Install
Marscapital Transaction Import	code:com.finmars.marscapital-transaction-import	version: 1.0.2	Install
Marscapital Transaction Types	code:com.finmars.marscapital-transaction-type	version: 1.0.6	Install
PDF Builder	code:com.finmars.pdf-builder	version: 1.0.3	Install
PLAT-91	code:com.finmars.plat-91	version: 1.0.0	Install
Revolut	code:com.finmars.revolut	version: 1.0.2	Install
Revolut Broker	code:com.finmars.revolut-broker	version: 1.0.2	Install
Standard - Aliases	code:com.finmars.standard-aliases	version: 1.6.0	Reinstall
Standard - Asset Manager Layouts	code:com.finmars.standard-asset-manager-layouts	version: 1.0.8	Install
Standard Configuration	code:com.finmars.standard-monitoring	version: 1.6.2	Update
Standard IAM	code:com.finmars.standard-iam	version: 1.0.1	Reinstall
Standard Import - File	code:com.finmars.standard-import-from-file	version: 1.6.0	Reinstall
Standard Import - Julius Baer	code:com.finmars.standard-import-julius-baer	version: 1.6.0	Install
Standard - Instrument Types	code:com.finmars.standard-instrument-type	version: 1.6.0	Reinstall
Standard - Layouts	code:com.finmars.standard-layouts	version: 1.6.1	Update
Standard - Monitoring	code:com.finmars.standard-monitoring	version: 1.0.8	Install
Standard - Monitoring (Interface)	code:com.finmars.standard-monitoring-interface	version: 1.0.0	Install
Standard - New User Setup	code:com.finmars.standard-new-user-setup	version: 1.6.1	Update
Standard - Other	code:com.finmars.standard-other	version: 1.6.0	Reinstall
Standard - Pricing	code:com.finmars.standard-pricing	version: 1.6.0	Reinstall
Standard Pricing Roll	code:com.finmars.standard-pricing-roll	version: 1.0.1	Install
Standard - Transaction Types	code:com.finmars.standard-transaction-type	version: 1.6.0	Reinstall
Standard - Workflow	code:com.finmars.standard-workflow	version: 1.6.2	Update
Standard - Workflow (Access)	code:com.finmars.standard-workflow-access	version: 2.0.1	Install
Standard - Workflow All Sources	code:com.finmars.standard-workflow-all-sources	version: 1.1.1	Reinstall
Standard - Workflow (CIM)	code:com.finmars.standard-workflow-cim	version: 0.9.1	Reinstall
Standard - Workflow (Exante)	code:com.finmars.standard-workflow-exante	version: 0.9.1	Reinstall
Standard - Workflow Interface	code:com.finmars.standard-workflow-interface	version: 1.3.1	Reinstall

Picture 1. Installing/updating the module/package

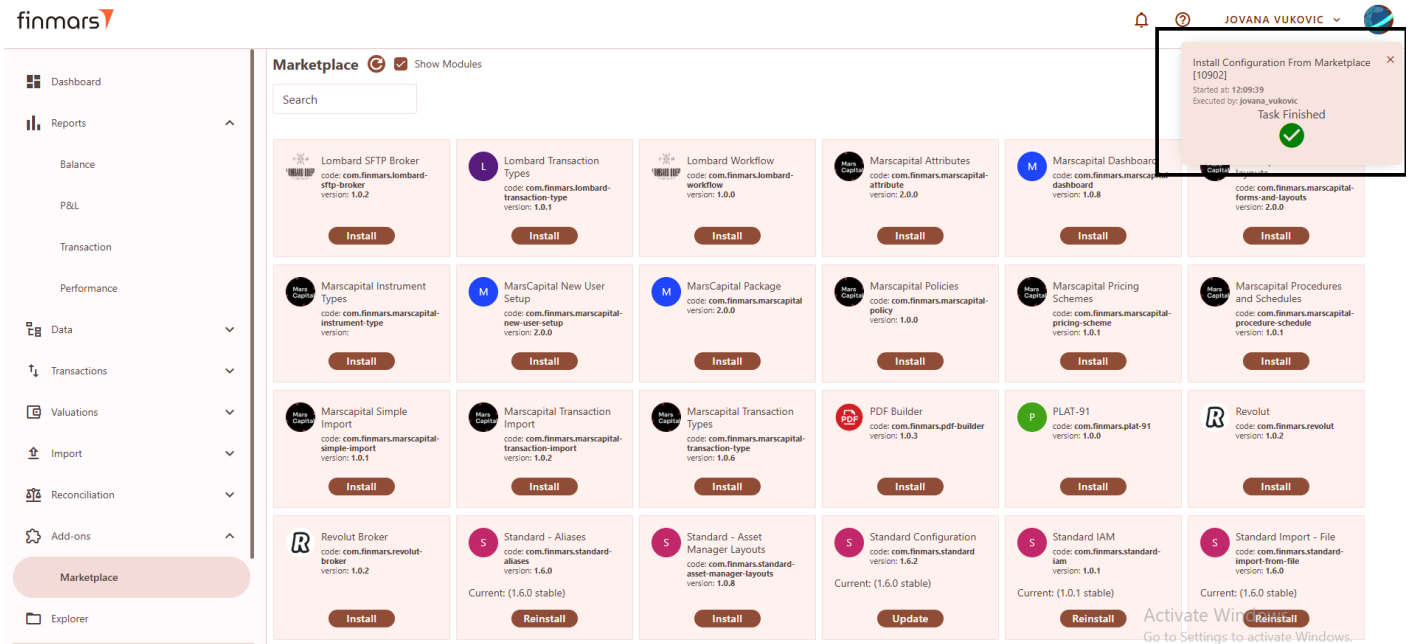
Step 2. Confirm that the installation has started. A pop-up window will appear in the top-right corner.

The screenshot shows the Finmars Marketplace interface with the 'Standard - New User Setup' module highlighted. A pop-up window in the top-right corner displays the installation progress. The window title is 'Install Configuration From Marketplace' and it shows a progress bar and the status 'Started at: 12:08:55 Executed by: jovana_vukovic'.

Module Name	Code	Version	Action
Revolut Broker	code:com.finmars.revolut-broker	version: 1.0.2	Install
Standard - Aliases	code:com.finmars.standard-aliases	version: 1.6.0	Reinstall
Standard - Asset Manager Layouts	code:com.finmars.standard-asset-manager-layouts	version: 1.0.8	Install
Standard Configuration	code:com.finmars.standard-monitoring	version: 1.6.2	Update
Standard IAM	code:com.finmars.standard-iam	version: 1.0.1	Reinstall
Standard Import - Julius Baer	code:com.finmars.standard-import-julius-baer	version: 1.6.0	Install
Standard - Instrument Types	code:com.finmars.standard-instrument-type	version: 1.6.0	Reinstall
Standard - Layouts	code:com.finmars.standard-layouts	version: 1.6.1	Update
Standard - Monitoring	code:com.finmars.standard-monitoring	version: 1.0.8	Install
Standard - Monitoring (Interface)	code:com.finmars.standard-monitoring-interface	version: 1.0.0	Install
Standard - New User Setup	code:com.finmars.standard-new-user-setup	version: 1.6.1	Update
Standard - Other	code:com.finmars.standard-other	version: 1.6.0	Reinstall
Standard - Pricing	code:com.finmars.standard-pricing	version: 1.6.0	Reinstall
Standard Pricing Roll	code:com.finmars.standard-pricing-roll	version: 1.0.1	Install
Standard - Transaction Types	code:com.finmars.standard-transaction-type	version: 1.6.0	Reinstall
Standard - Workflow	code:com.finmars.standard-workflow	version: 1.6.2	Update
Standard - Workflow (Access)	code:com.finmars.standard-workflow-access	version: 2.0.1	Install
Standard - Workflow All Sources	code:com.finmars.standard-workflow-all-sources	version: 1.1.1	Reinstall
Standard - Workflow (CIM)	code:com.finmars.standard-workflow-cim	version: 0.9.1	Reinstall
Standard - Workflow (Exante)	code:com.finmars.standard-workflow-exante	version: 0.9.1	Reinstall
Standard - Workflow Interface	code:com.finmars.standard-workflow-interface	version: 1.3.1	Reinstall

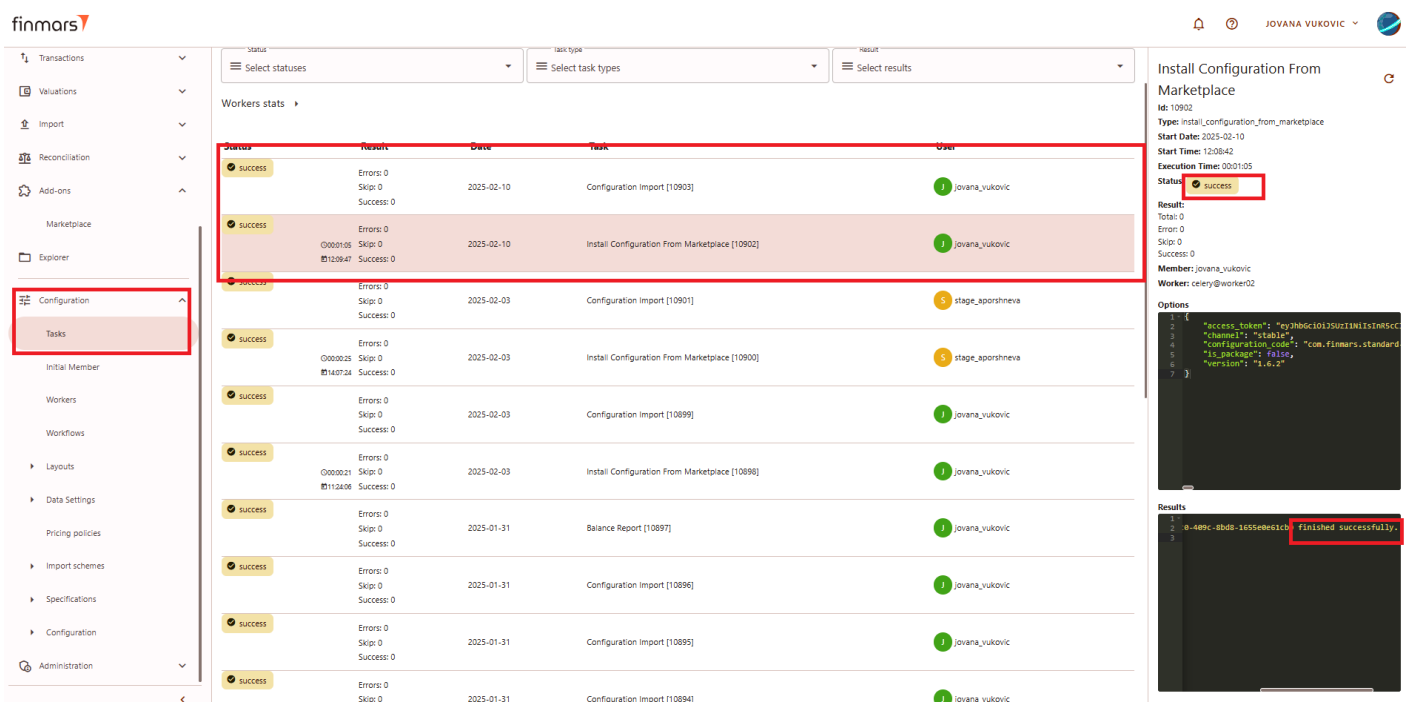
Picture 2. Starting installation

Step 3. Confirm that the installation was successful. A pop-up window will appear in the top-right corner with the message **"Task Finished."**



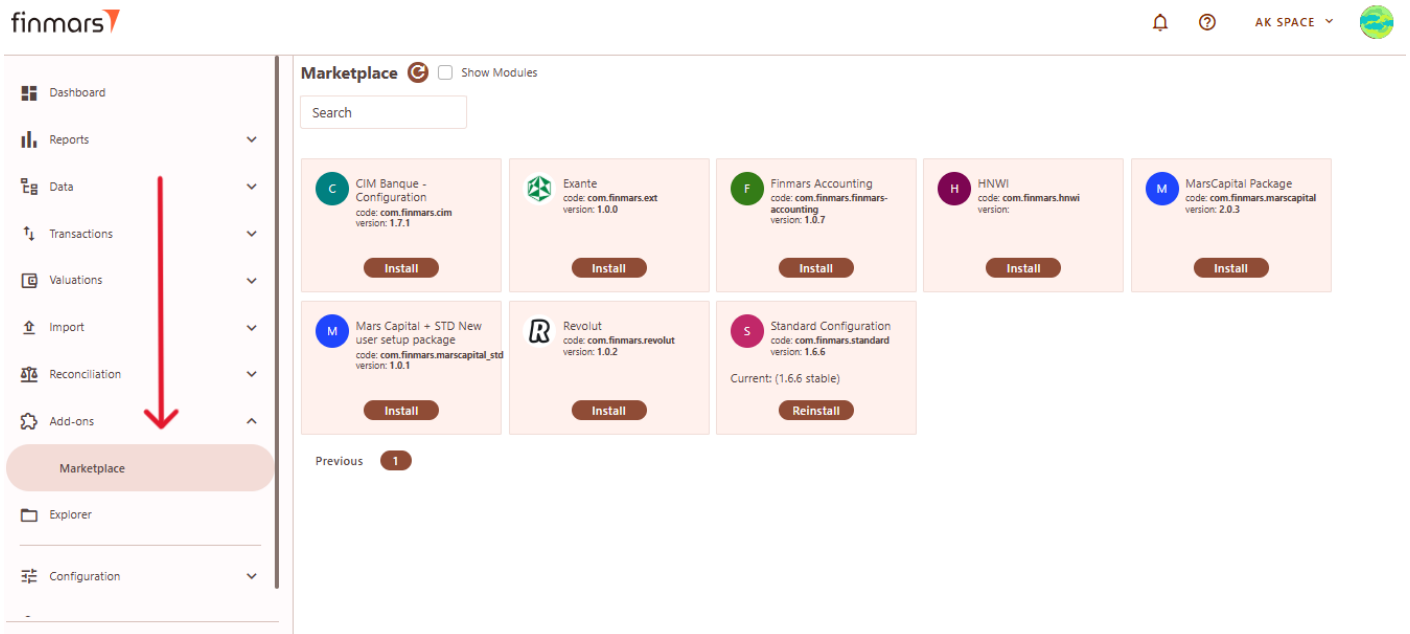
Picture 3. Successful installing/updating the package/module from marketplace

Step 4. Additional confirmation can be checked in the Task section. Navigate to **Configuration > Tasks** in the menu and verify the status. The expected result is **"Success"** without any errors.



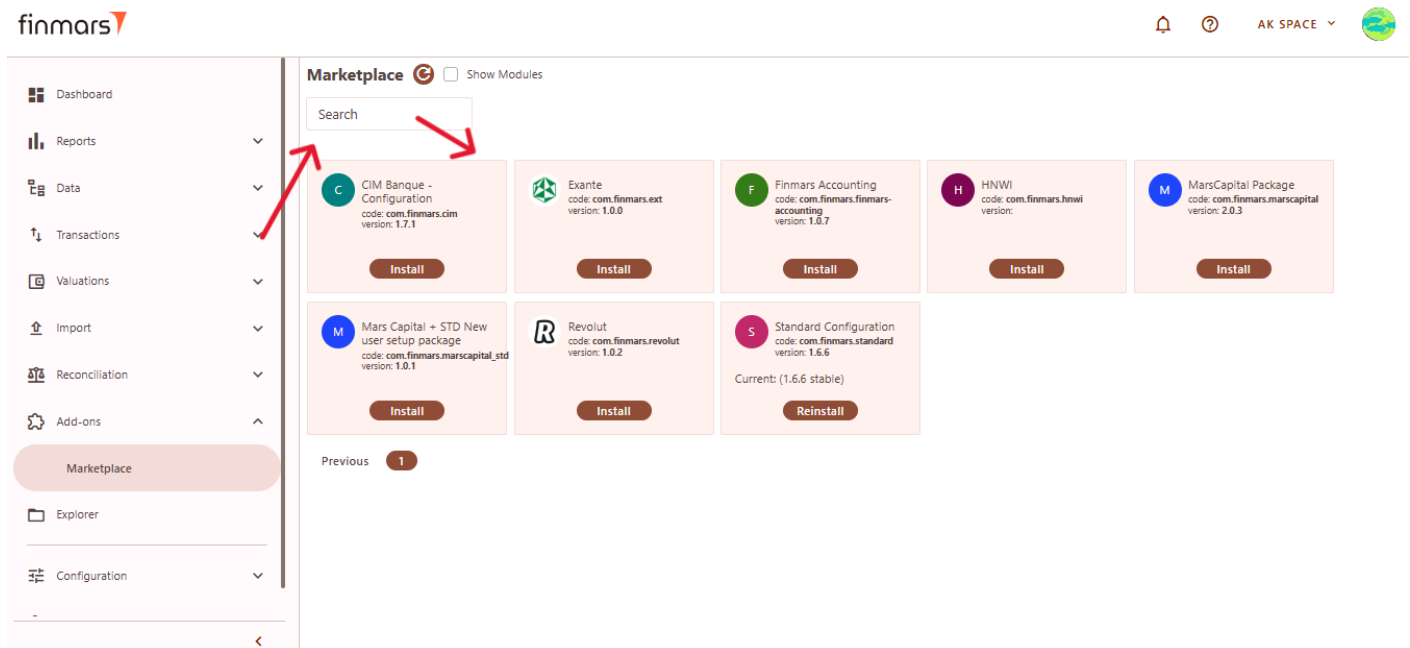
Picture 4. Successful installing/updating the package/module from marketplace checking the result

Step 5. If you want to install a different version of a module, navigate to the **Marketplace** from the left-side menu.



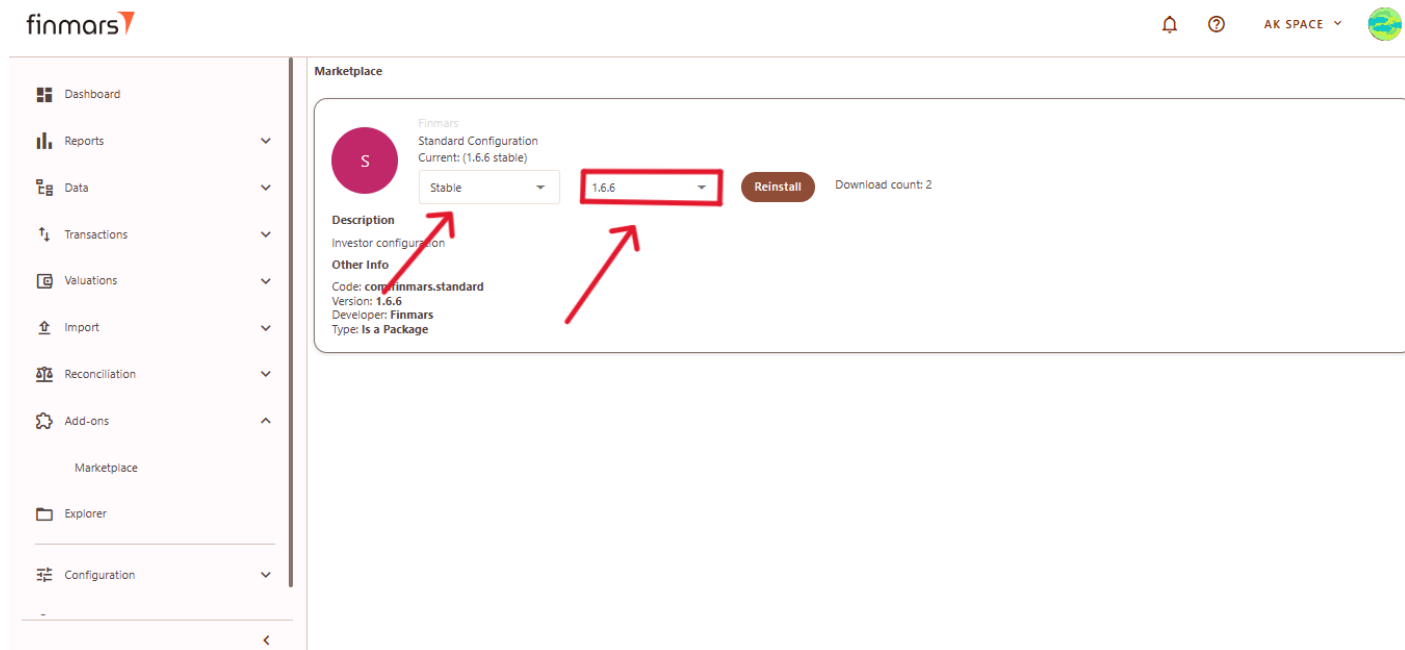
Picture 5. Navigating to the Marketplace

Step 6. Use the search bar at the top to find the required module. Click on the needed module card to open its details.



Picture 6. Searching for the Required Module

Step 7. In the module details, locate the version selection dropdown. First, you need to select the **release type** (Stable or Release Candidate) and then choose the desired version from the available options.



Picture 7. Changing the Version

Step 8. Click **Reinstall** to apply the selected version. After installation, go to **Configuration -> Tasks** to check the status and ensure the update was completed successfully. See step 4.

Revision #12

Created 27 January 2025 11:13:38 by Sergei Osipov

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