

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

Prerequisites

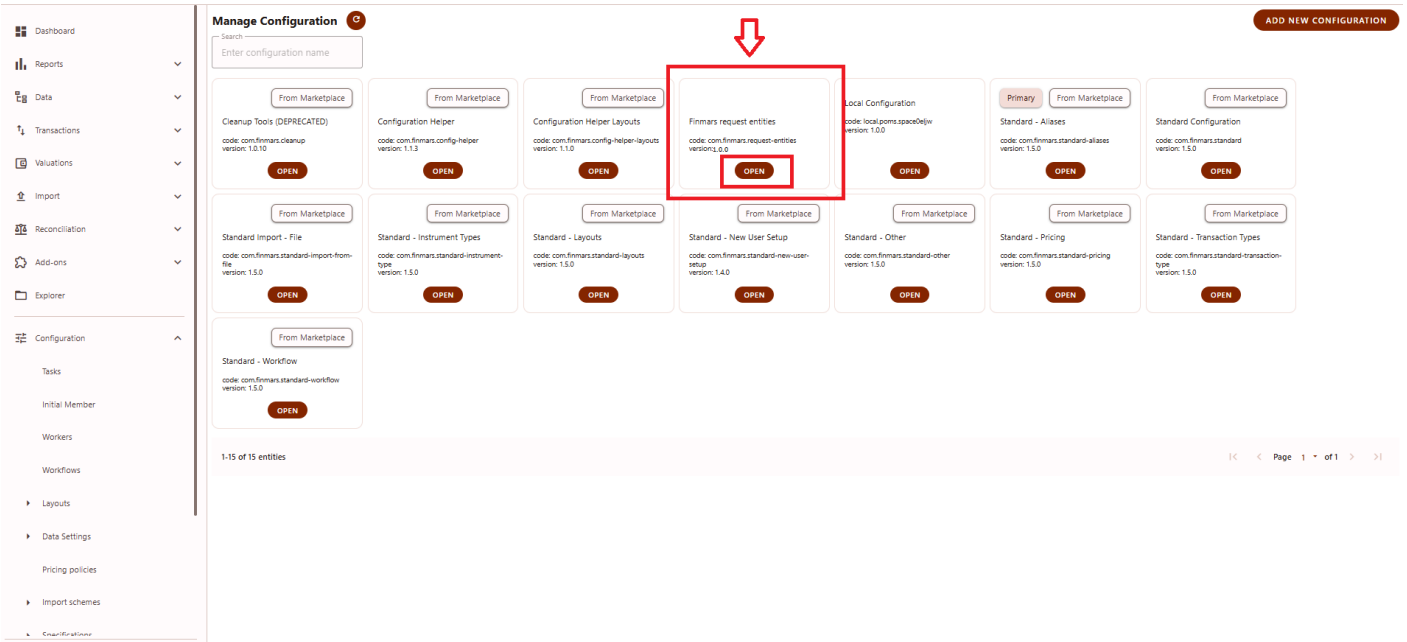
We assume you have all prerequisites you may need, including:

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
6. Must have: the module/package is already created

Pushing a Module/Package to the Marketplace and updating version

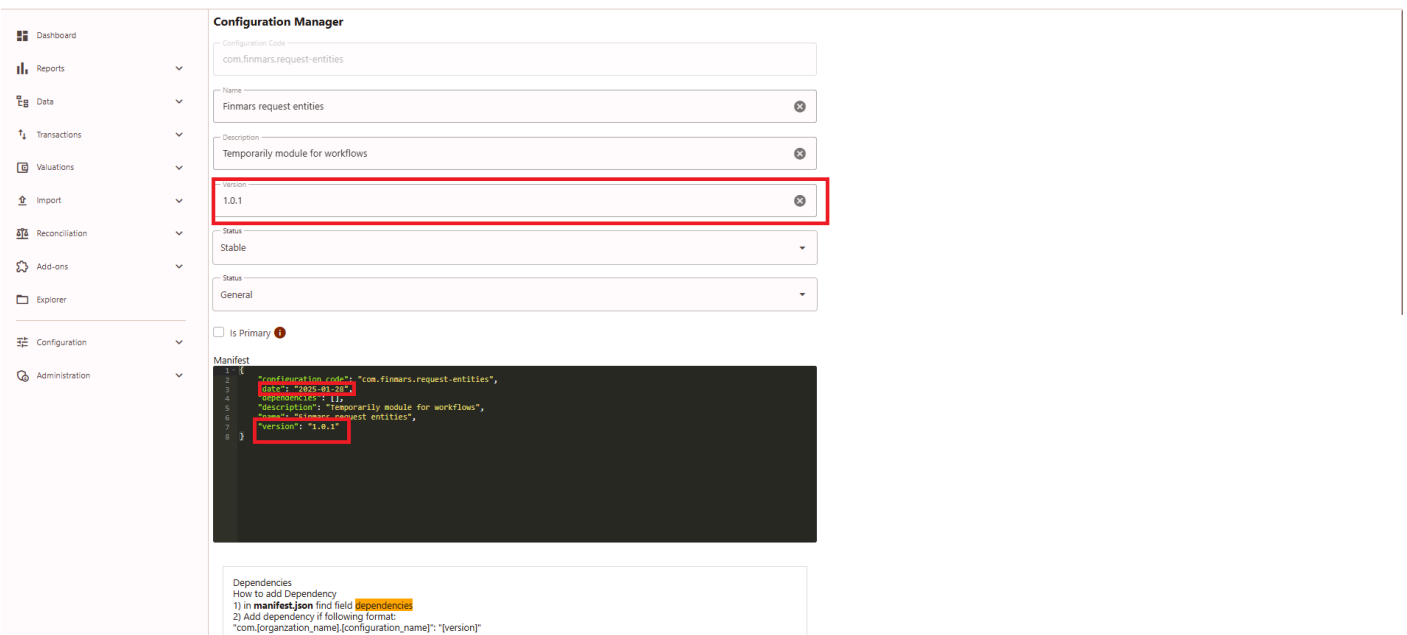
Step 1: After creating/modified the module/package, go to the Configuration Manage page, click on the card for the module/package. It has been created/modified locally, but now it needs to be pushed to the marketplace.

* The example in the pictures shows a module, but the process is the same for a package.



Picture 1. Marketplace with new module

Step 2. Before pushing a new module/package, ensure that the date and version are correct. Usually a new version is needed, so increment the version number in the configuration manager and the manifest file so they will be the same.



Picture 2. Date and version of the released package/module

Step 3. Select appropriate Status for the configuration's version:

1. **Stable** - the latest version of stable releases are installed by default from the Marketplace
2. **Release Candidate** - this version can be installed manually from the Marketplace

The screenshot shows the 'Configuration Manager' interface. On the left is a navigation menu with categories like Configuration, Tasks, Initial Member, Workers, Workflows, Layouts, Data Settings, Pricing policies, Import schemes, Specifications, Configuration, Import, Manage, and Administration. The main area displays configuration details for 'com.finmars.request-entities'. Fields include Configuration Code, Name, Description, and Version. A 'Status' dropdown menu is open, showing 'Stable' and 'Release Candidate' options. Below the dropdown is an 'Is Primary' checkbox. At the bottom, a 'Manifest' section shows a JSON snippet.

```
1 {
2   "configuration_code": "com.finmars.request-entities",
3   "date": "2025-01-28",
4   "dependencies": [],
5   "description": "Temporarily module for workflows",
6   "name": "Finmars request entities",
7   "version": "1.0.1"
8 }
```

Picture 3. Selecting Status

Step 4. When creating a package, ensure that all required dependencies are included in the Manifest JSON. Refer to the example below.

```
{
  "actions": [
    {
      "workflow": "com.finmars.standard-workflow:init"
    }
  ],
  "configuration_code": "com.finmars.standard",
  "date": "2025-02-08",
  "dependencies": [
    {
      "channel": "stable",
      "configuration_code": "com.finmars.standard-transaction-type",
      "version": "1.6.1"
    },
    ...
    {
      "channel": "stable",
      "configuration_code": "com.finmars.standard-iam",
      "version": "1.0.2"
    }
  ]
}
```

```

    ],
    "description": "Package for Standard configuration",
    "name": "Standard - Configuration",
    "primary_module": "com.finmars.standard-aliases",
    "version": "1.6.4"
  }

```

Manifest

```

1- {
2-   "actions": [
3-     {
4-       "workflow": "com.finmars.standard-workflow:init"
5-     }
6-   ],
7-   "configuration_code": "com.finmars.standard",
8-   "date": "2025-02-08",
9-   "dependencies": [
10-    {
11-      "channel": "stable",
12-      "configuration_code": "com.finmars.standard-transaction-type",
13-      "version": "1.6.1"
14-    },
15-    {
16-      "channel": "stable",
17-      "configuration_code": "com.finmars.standard-aliases",
18-      "version": "1.6.8"
19-    }
20-  ]
21- }

```

Package Mode
 Package - special type on configuration that consist of other configurations together
 When you push your **Package Configuration** to marketplace. It scans **manifest.json** **dependencies** field and includes to result .zip file all configurations that you have in your **System Storage**
 Is Package

Dependencies
 How to add Dependency
 1) in **manifest.json** find field **dependencies**
 2) Add dependency if following format:
 "com.[organization_name].[configuration_name]": "[version]"
 Example:

```

{
  "configuration_code": "com.finmars.hnwi",
  "date": "2023-04-21",
  "dependencies": [
    {"configuration_code": "com.finmars.hnwi-transaction-type", version: "1.0.0"}
  ]
}

```

Picture 4. Adding dependencies in case of the package creating

Step 5: Click the '**UPDATE**' button to apply changes to the Manifest for further Export to Storage and Push.

[10913] Started at: 12:46:04

EXPORT TO STORAGE

This action will trigger **save** and export all configuration files to local Storage system. You can find your configuration files in the Explorer
 Destination path is:
configurations/com.finmars.request-entities/1.0.2/

PUSH CONFIGURATION TO MARKETPLACE

This action will trigger **save** and export current saved configuration (in System Storage) as zip to **Finmars Marketplace**
 Be aware of versions that you put there
Finmars Marketplace work only in append mode
 it means you cannot push multiple times the same version
 Each push should create new unique version

Warning. Before pushing new version, please, check if it was exported to your System Storage.

You can find status of your push in the
 Tasks
 page
 If everything is good, your configuration will appear on Marketplace

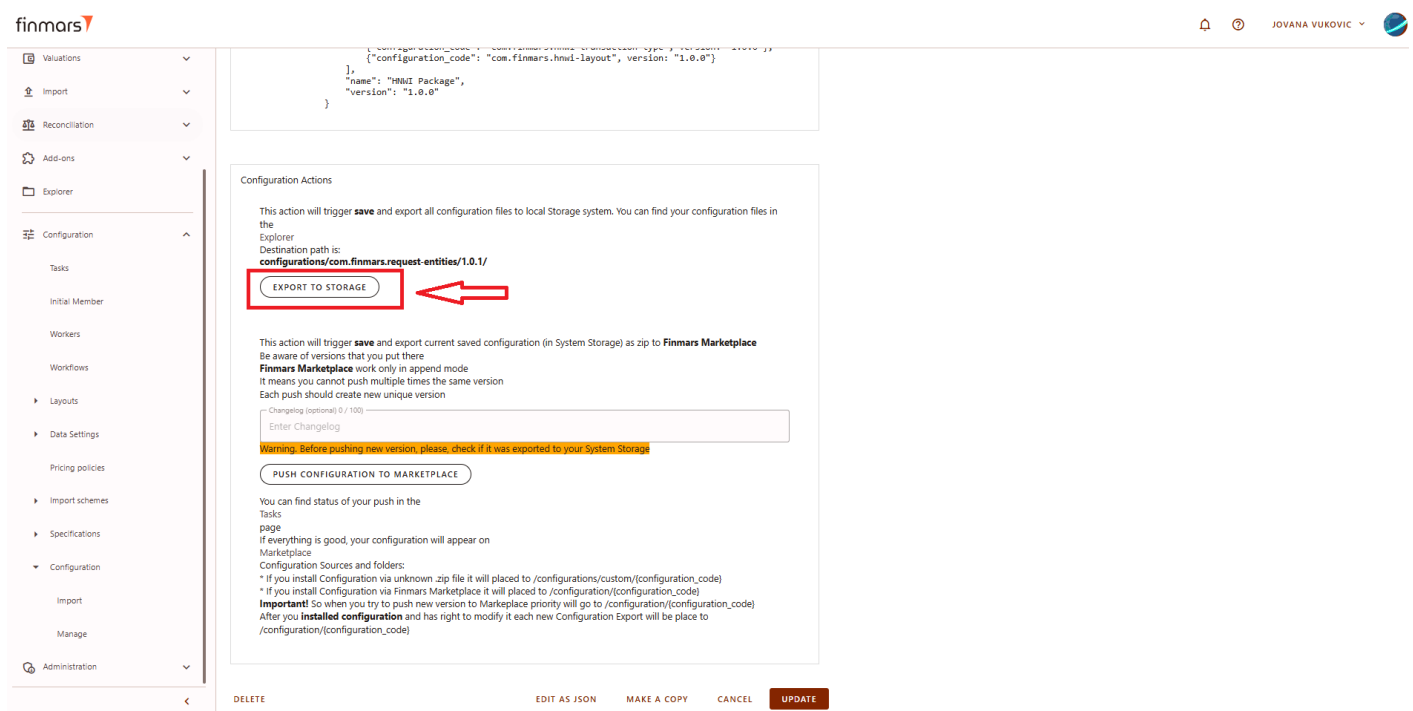
Configuration Sources and folders:
 * If you install Configuration via unknown .zip file it will placed to /configurations/custom/(configuration_code)
 * If you install Configuration via Finmars Marketplace it will placed to /configuration/(configuration_code)
Important! So when you try to push new version to Marketplace priority will go to /configuration/(configuration_code)
 After you **installed configuration** and has right to modify it each new Configuration Export will be place to /configuration/(configuration_code)

DELETED EDIT AS JSON MAKE A COPY CANCEL **UPDATE**

* If you install Configuration via unknown .zip file it will placed to /configurations/custom/(configuration_code)
 * If you install Configuration via Finmars Marketplace it will placed to /configuration/(configuration_code)

Picture 5. Updating the version of the released package/module

Step 6: After updating, open the configuration again and export the configuration to storage. Click on the button "**Export to storage**" This action will save and export all configuration files to the local system storage.



Picture 6. Export to storage

Step 7. Clicking the button will initiate export to storage.



Picture 7. Exporting to storage

Step 8. Wait until the task status shows "**Task Finished**" and manually verify that the export was completed successfully to ensure everything is in order.

- Configuration
- Tasks
- Initial Member
- Workers
- Workflows
- Layouts
- Data Settings
- Pricing policies
- Import schemes
- Specifications
- Configuration
- Import

```

date: "2023-04-21",
"dependencies": [
  {"configuration_code": "com.finmars.hwmi-transaction-type", version: "1.0.0"},
  {"configuration_code": "com.finmars.hwmi-layout", version: "1.0.0"}
],
"name": "HNMI Package",
"version": "1.0.0"
}
        
```

Configuration Actions

This action will trigger **save** and export all configuration files to local Storage system. You can find your configuration files in the Explorer

Destination path is:
configurations/com.finmars.request-entities/1.0.2/

EXPORT TO STORAGE

[10913] X

Started at: 12-16-694

Executed by: jovana.vukovic

Task Finished

Picture 8. Successful export to storage

Step 9: Enter Changelog

- Configuration
- Tasks
- Initial Member
- Workers
- Workflows
- Layouts
- Data Settings
- Pricing policies
- Import schemes
- Specifications
- Configuration
- Import
- Manage
- Administration

This action will trigger **save** and export all configuration files to local Storage system. You can find your configuration files in the Explorer

Destination path is:
configurations/com.finmars.standard/1.6.4/

EXPORT TO STORAGE

This action will trigger **save** and export current saved configuration (in System Storage) as zip to **Finmars Marketplace**

Be aware of versions that you put there

Finmars Marketplace work only in append mode

It means you cannot push multiple times the same version

Each push should create new unique version

Changelog (optional) 0 / 100

Warning. Before pushing new version, please, check if it was exported to your System Storage

PUSH CONFIGURATION TO MARKETPLACE

You can find status of your push in the Tasks page

If everything is good, your configuration will appear on Marketplace

Configuration Sources and folders:

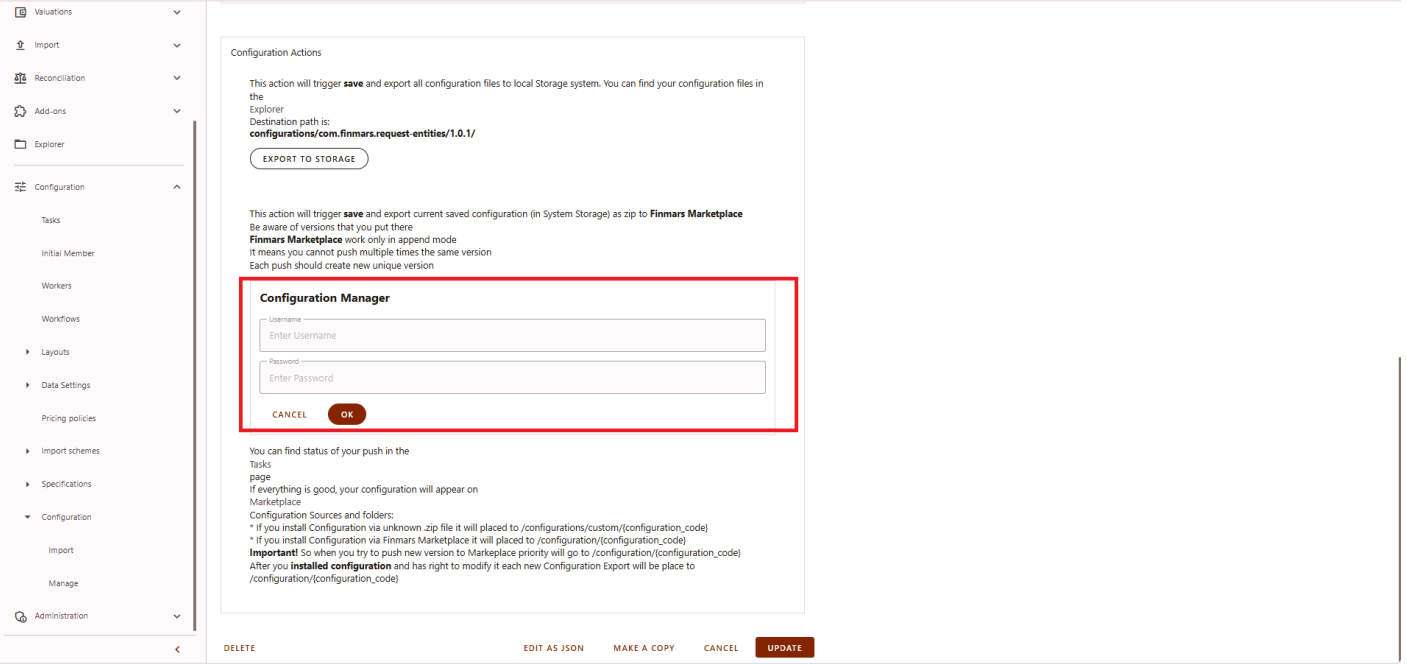
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Important! So when you try to push new version to Marketplace priority will go to /configuration/(configuration_code)

After you **installed configuration** and has right to modify it each new Configuration Export will be place to /configuration/(configuration_code)

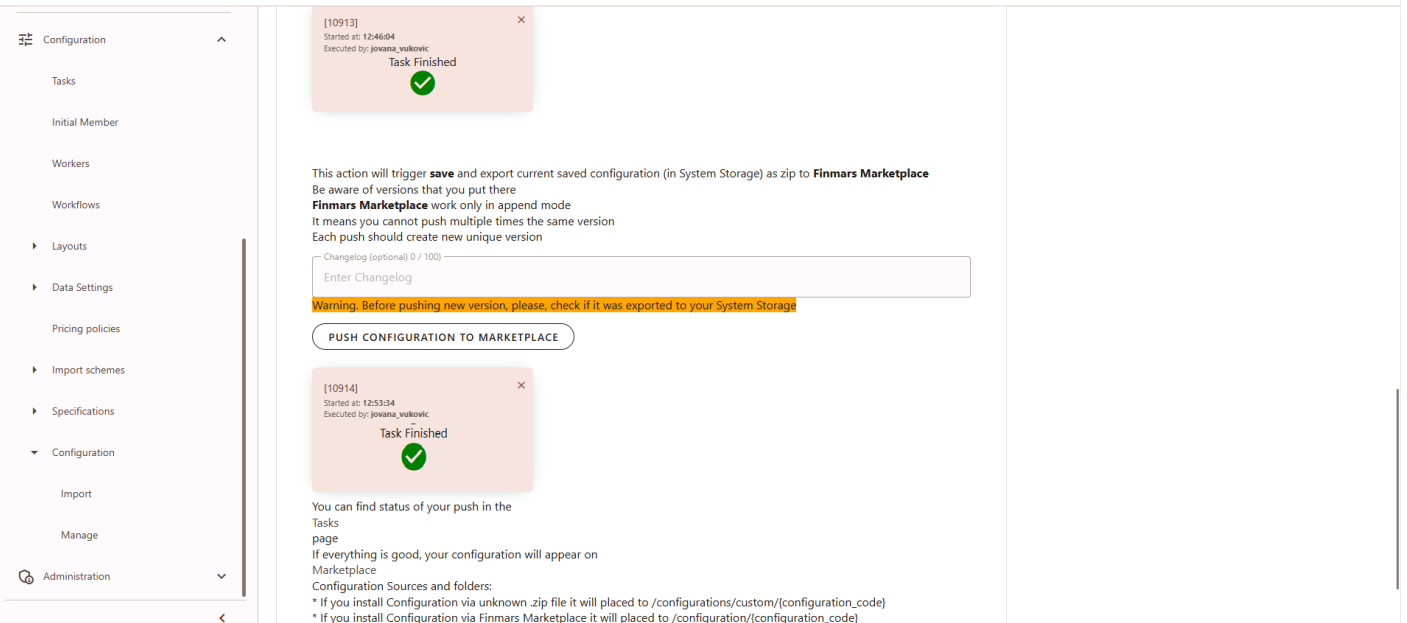
DELETE
EDIT AS JSON
MAKE A COPY
CANCEL
UPDATE

Step 10: Once the files have been successfully exported, enter the username and password provided by the administrator, then click "OK."



Picture 9. Pushing configuration to the marketplace

Step 11. Wait and verify until the task status shows "Task finished."



Picture 10. Successful pushing configuration to the marketplace

Revision #16

Created 2025-01-27 11:08:07 UTC by Sergei Osipov

Updated 2025-02-19 22:54:56 UTC by Sergei Osipov