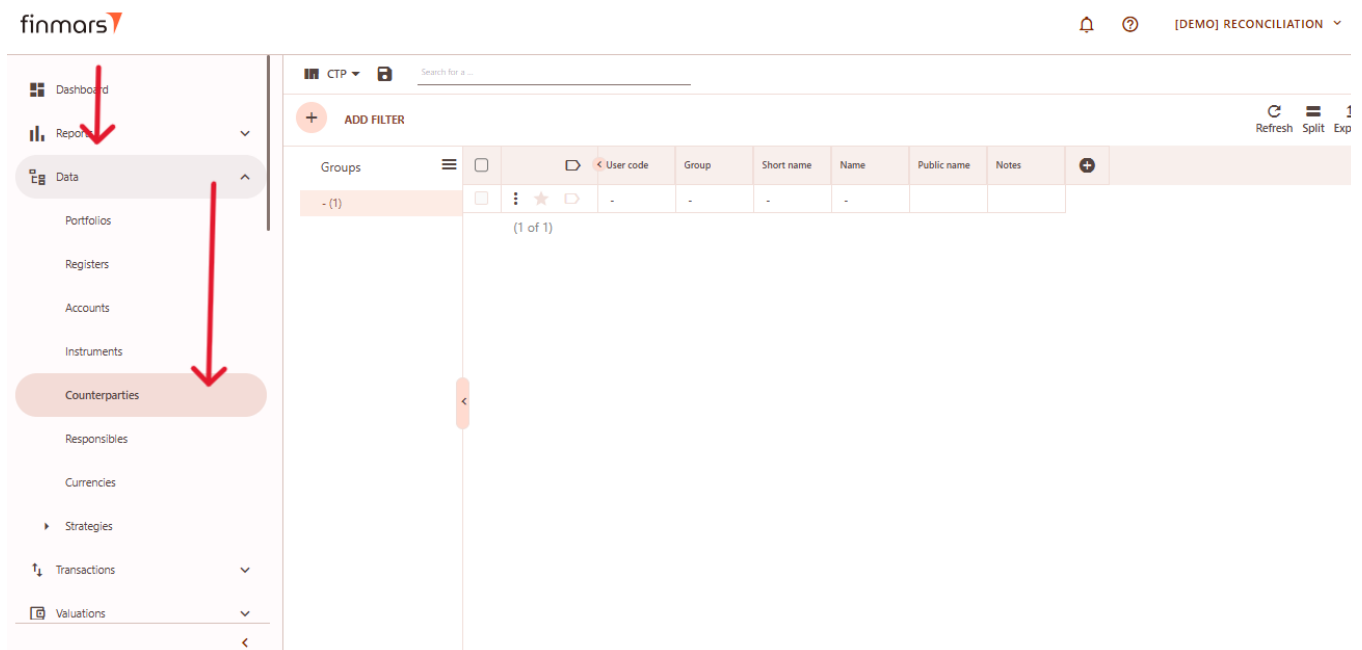# How to Create a Counterparty Entity

Prerequisites

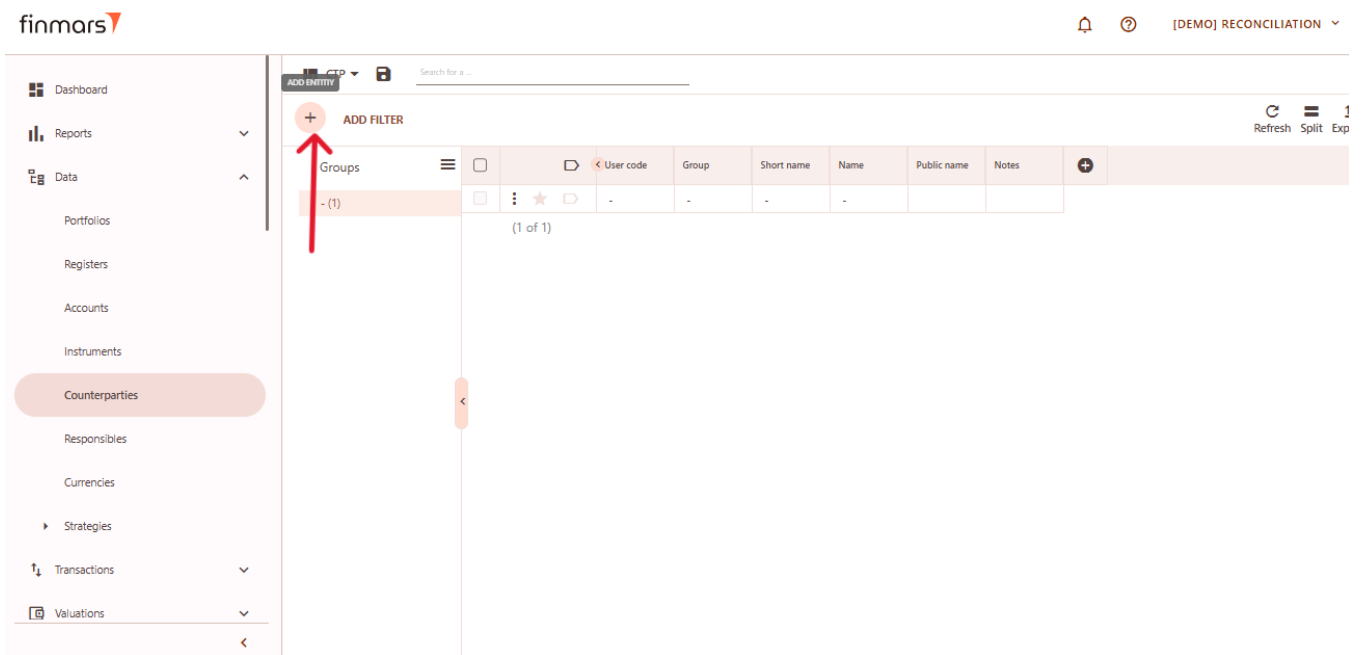We assume you have all prerequisites you may need, including:

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
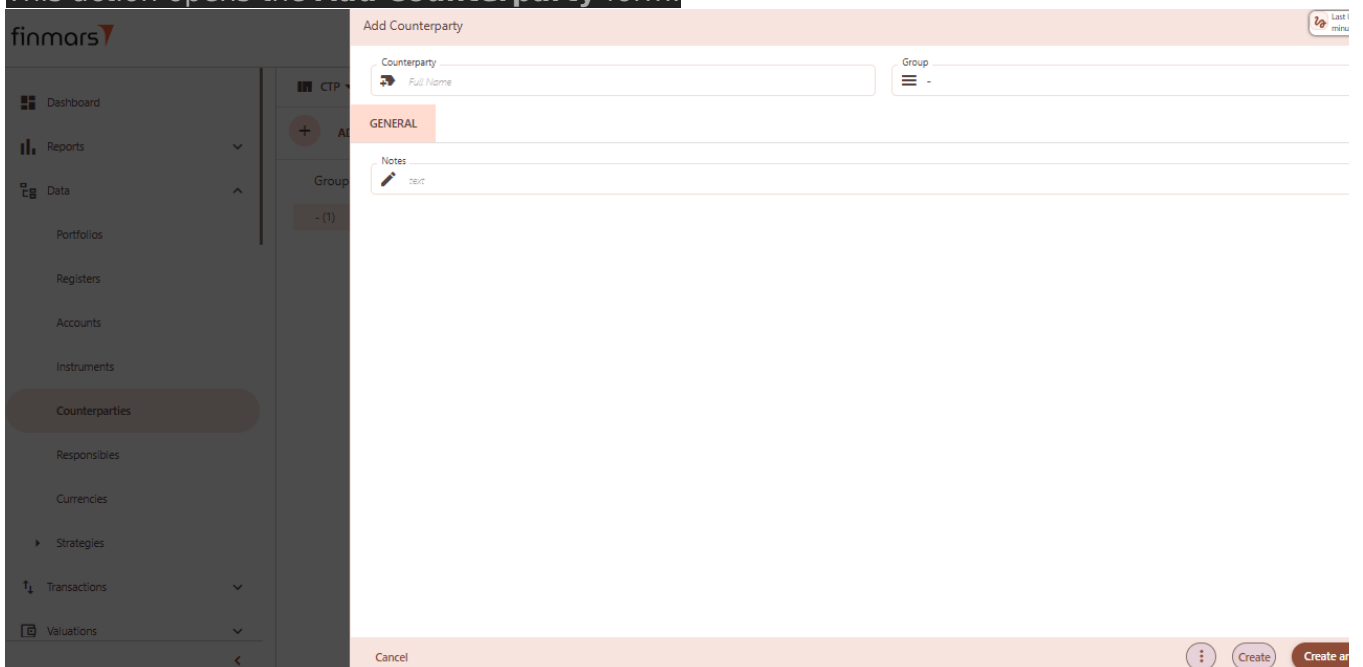
Creation of Counterparty Entity

1. Open the **"Data"** section in the left-hand side menu. Select the **"Counterparties"** entity from the list under **Data**.

2. **Click the "+ Add" button** located in the top-left corner of the portfolio list view.

3. This action opens the **Add Counterparty** form.

4. **Fill in the required fields in the creation panel:**
   1. **Counterparty** – full name or identifier for the counterparty (required). This can be a bank, broker, client, or any financial entity you deal with.
   2. **Group** – used to organize counterparties into categories such as "Banks," "Funds," "Clients," etc.

3. **Notes** – any additional internal comments or metadata for the counterparty.

5. Click **"Create and Exit"** to save the portfolio and return to the list view. Alternatively, use **"Create"** to save and continue editing.