

How to Create a Pricing Policy entity

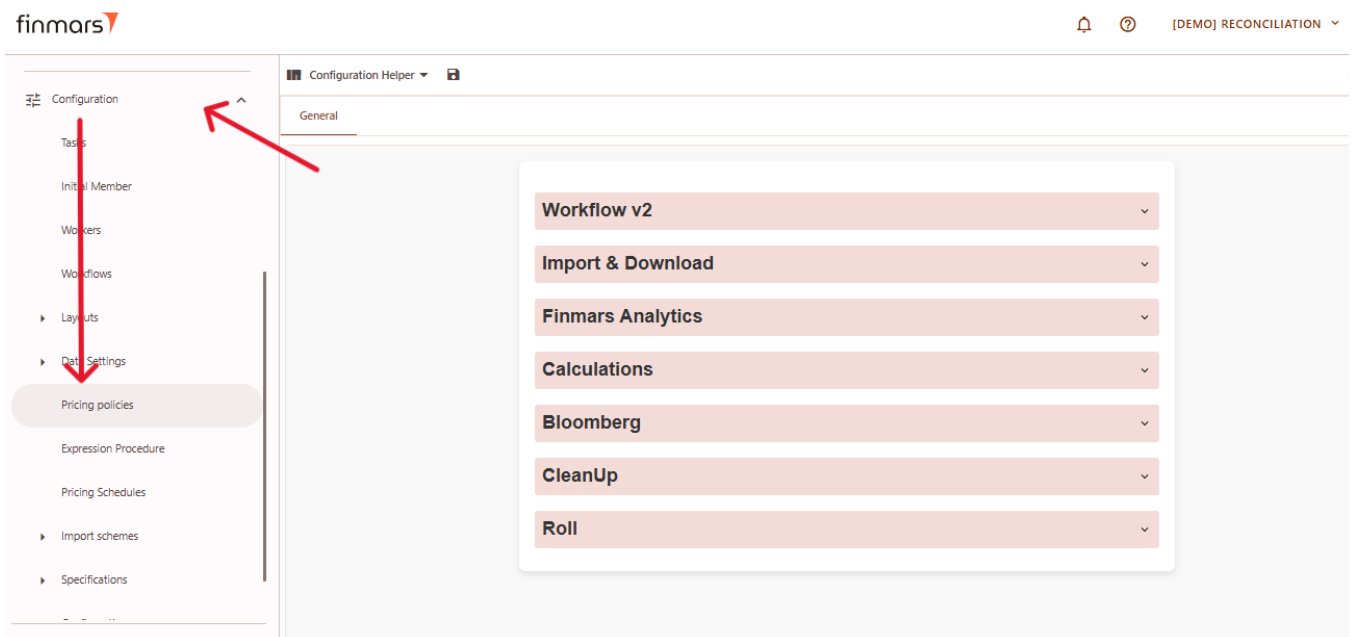
Prerequisites

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 Pricing Policy Entity

1. Open the **“Configuration”** section in the left-hand side menu. Select the **“Pricing Policies”** entity.



2. You will be directed to a page displaying a list of existing pricing policies.

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| Name | Unique Code | Notes | | |
|---------------|--|--|------|------|
| Master | com.finmars.standard-pricing:master | Combines all the other Pricing Policies existing in the Workspace. Compilation is done based on configured compilation order. Master Pricing Policy must be used in the Reports. | EDIT | DELE |
| Rolled Master | com.finmars.standard-pricing:rolled_master | Rolled Master Pricing Policy. Contain rolled Prices & FX Rates. Rolling method depends on rolling pricing module. | EDIT | DELE |
| Standard | com.finmars.standard-pricing:standard | Pricing Policy for Manual Import and Manually Created. | EDIT | DELE |
| - | local.poms.space0fkke:_ | | EDIT | |

ADD NEW

3. Scroll down to the bottom of the list and click the **Add new** button.

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ADD NEW

4. This action opens the **Create Pricing Policy** form.

The screenshot shows the 'Create Pricing Policy' form overlaid on the 'Pricing Policies' page. The form has a title bar with a close button (X). It contains the following fields:

- Name:** A text input field.
- Configuration Code:** A dropdown menu with 'com.finmars.standard-layouts' selected.
- User code:** A text input field with 'User code' entered.
- Result:** A text area for the result of the configuration.
- Notes:** A text area for additional comments.

At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'.

5. Fill in the following fields:

1. **Name** – the name of the pricing policy.
 2. **Configuration Code** – select from the dropdown menu.
 3. **User Code** – enter a user code using only lowercase letters (a-z), numbers (0-9), and special characters: underscore (_) or dash (-).
 4. **Notes** – any additional comments or context.
6. Once all required data is filled out, click **Save** to create the new pricing policy.

This screenshot is identical to the one above, showing the 'Create Pricing Policy' form. A red arrow points to the 'SAVE' button at the bottom right of the form.

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