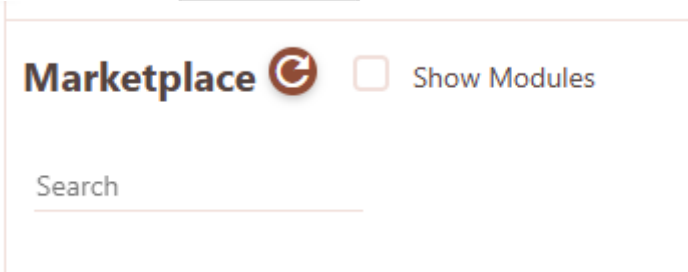


Dashboard Setup

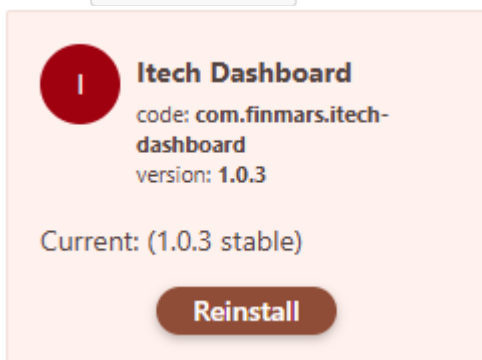
- Integration to 3rd party

Integration to 3rd party

1. Go to the `Settings -> Configuration -> Marketplace`
2. Click checkbox `Show Modules`



3. Install `Itech dashboard` module



4. Generate a token by visiting the link

https://eu-central-2.finmars.com/{realm_code}/{space_code}/api/v1/auth-tokens/personal-access-token/create-token/

5. Enter:
 - the `name` and `user_code` of the token (at your discretion),
 - set `access_level` - `admin`,
 - `days to live` - at your discretion
6. Prepare to embed a script with JS code on an external site from the example below:
 - add the token to it
 - change `realm_code` and `space_code` in the `loadSecureModule` function
 - change the values for the variables in `realCode` and `spaceCode`
 - change the identifier for the selector from the HTML page where the dashboard element needs to be inserted

```
<!DOCTYPE html>
<html>
<head>
  <meta charset="utf-8">
  <meta name="viewport" content="width=device-width, initial-scale=1">
```

```
<title>Itech External Dashboard</title>

<style type="text/css">
  html {
    font-size: 100%;
  }

  body {
    font-family: helvetica;
  }

</style>
</head>
<body>

<h1>Itech</h1>

<div style="display: flex;">

<div style="margin-right: 20px;">
  <div><label>External Date Picker</label></div>
  <input class="date-picker" type="date" name="" value="2024-07-16">
</div>

<div>
  <div><label>External Portfolio Picker</label></div>
  <select class="portfolio-picker">
    <option>IKF1218.001</option>
  </select>
</div>

</div>

<div>

  <div class="finmars-holder" style="padding: 20px; margin: 20px;">

    <div style="margin-bottom: 1rem;">Section for Finmars Dashboard</div>

    <div id="dashboardContainer"></div>
```

</div>

</div>

<script>

```
var FINMARS_API_KEY = "YOUR_API_KEY"
```

```
function loadSecureModule(url, apiKey) {
```

```
  return fetch(url, {
```

```
    headers: {
```

```
      'Authorization': `Bearer ${apiKey}`
```

```
    }
```

```
  })
```

```
  .then(response => {
```

```
    if (!response.ok) {
```

```
      throw new Error(`HTTP error! Status: ${response.status}`);
```

```
    }
```

```
    return response.text();
```

```
  })
```

```
  .then(scriptText => {
```

```
    const blob = new Blob([scriptText], { type: 'application/javascript' });
```

```
    const scriptURL = URL.createObjectURL(blob);
```

```
    return import(scriptURL);
```

```
  });
```

```
}
```

```
loadSecureModule('https://eu-central-
```

```
2.finmars.com/realm0sqjq/space00ql8/api/storage/workflows/com/finmars/itech-dashboard/dashboard.js',
```

```
FINMARS_API_KEY)
```

```
  .then(async (module) => {
```

```
    const FinmarsDashboard = module.default;
```

```
    const dashboard = new FinmarsDashboard({
```

```
      apiKey: FINMARS_API_KEY,
```

```
      selector: '#dashboardContainer',
```

```
    realmCode: "realm00000",  
    spaceCode: "space00000",  
    domain: "eu-central-2.finmars.com",  
  });
```

```
await dashboard.init();
```

```
dashboard.dashboardStore.setDateTo("2024-07-16");  
dashboard.dashboardStore.setPortfolios(["IKF1218.001"]);  
dashboard.renderDashboard();
```

```
document.querySelector('.date-picker').addEventListener("change", function(event) {
```

```
    console.log('datePicker.event', event);
```

```
    dashboard.dashboardStore.setDateTo(event.target.value);  
    dashboard.renderDashboard();
```

```
  })
```

```
document.querySelector('.portfolio-picker').addEventListener("change", function(event) {
```

```
    console.log('datePicker.event', event);
```

```
    dashboard.dashboardStore.setPortfolios([event.target.value]);  
    dashboard.renderDashboard();
```

```
  })
```

```
  })
```

```
.catch(error => console.error('Error loading the script:', error));
```

```
</script>
```

```
</body>
```

```
</html>
```

7. Next, you can change the `date-picker` and `portfolio-picker` to your own HTML elements