

Installation guide with AWS (Simple)

Installation Finmars CE on AWS with prepared AMI

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Getting Started

Hello!

Welcome to Finmars, below you will find guidance of how to Install Everything

We also recommend you to obtain [Finmars ID](#)

Here is summary of what we will achieve during this tutorial

To complete this guide you will need only **Web Browser**

- Register AWS account - [Link](#)
 - Register Domain Name - [Link](#)
 - Create Finmars CE Machine (VM) - [Link](#)
 - Setup Finmars CE - [Link](#)
 - Configure Finmars - Consider our [Guide with Configuring Finmars](#)
 - Uploading Data to Finmars (using .xlsx) - Consider our [Guide with Importing Demo Data](#)
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If you have some troubles during Installation - reach for any support channel:

- Create a [Github Issue](#)
- Join our [Discord](#) Server
- Contact us at support@finmars.com

Register AWS Account

Here is a simple, step-by-step guide to make an AWS account:

1. **Open your web browser**
(for example: Chrome, Firefox, or Edge).
2. **Go to the AWS website**
Type aws.amazon.com in the address bar and press Enter.
3. **Start the sign-up**
Click the **“Create an AWS Account”** button at the top right.
4. **Enter your email and name**
 - In the first box, type your email address.
 - In the box below, type a name for your account (you can use your name or any name you like).
5. **Choose a password**
 - Make a password you can remember.
 - Re-type it to confirm.
6. **Fill in your contact details**
 - Select **“Professional”** or **“Personal”** account.
 - Type your full name, phone number, and address.
 - Click **“Continue”**.
7. **Add payment information**
 - AWS needs a credit or debit card to verify you.
 - Type your card number, month/year, and name on card.
 - Click **“Verify and Add”**.
8. **Confirm your phone number**
 - Choose your country code and type your phone number.
 - Click **“Send SMS”**.
 - You’ll get a text with a code. Type that code into the box.
9. **Pick a support plan**
 - You can choose the **Free Tier** plan (it has no monthly cost).
 - Click **“Continue”**.
10. **Finish and sign in**
 - After a few minutes, AWS will finish setting up.
 - Click **“Sign In to the Console”**.
 - Enter your email and password again.

You now have an AWS account! ☐☐

You can log into the AWS Console and start using services.

Go to next step: [Register Domain Name](#)

Register Domain Name

You can register a domain right inside AWS using Route 53. Here's how, in simple steps:

- 1. Sign in to AWS Console**
Go to <https://console.aws.amazon.com> and log in.
- 2. Open Route 53**
In the search bar at top, type "Route 53" and click the Route 53 service.
- 3. Go to Registered Domains**
In the left menu, click "**Registered domains.**"
- 4. Start a new registration**
Click the "**Register domain**" button.
- 5. Search your name**
 - In the box, type the name you want (for example,).
 - Click "**Check**".
- 6. Choose an available name**
 - If it's free, click "**Add to cart.**"
 - If not, try a different name or ending (like .
- 7. View your cart**
Click "**Review**" or go to the cart icon.
- 8. Enter contact details**
 - AWS needs your name, address, email, and phone.
 - If you want privacy, check "**Enable privacy protection.**"
 - Click "**Continue.**"
- 9. Verify and purchase**
 - Review the price and years (1 year, 2 years, etc.).
 - Click "**Complete order.**"
- 10. Wait for confirmation**
AWS will send you an email when your domain is ready. It usually takes a few minutes.
- 11. Create a Hosted Zone** (to use your domain)
 - Back in Route 53, click "**Hosted zones.**"
 - Click "**Create hosted zone.**"
 - Type your new domain name and click "**Create.**"
- 12. Point your domain to AWS**
 - In your hosted zone, copy the "Name servers" listed.
 - If AWS registered your domain, this is set automatically.
 - If you used another registrar, paste these name servers into their DNS settings.

Now your domain is registered and ready in AWS! ☐☐

You can add records (A, CNAME, MX) in your hosted zone to make your finmars work. See it in "

Create Virtual Machine" Page

Create Finmars CE VM

Sure! Let's make your EC2 and name it **finmars-platform-vm**. Follow these steps:

1. Sign in to AWS

- Open your browser and go to console.aws.amazon.com.
- Enter your AWS email and password.

2. Open EC2

- At the top, click the search box and type **EC2**.
- Click **EC2** under "Services."

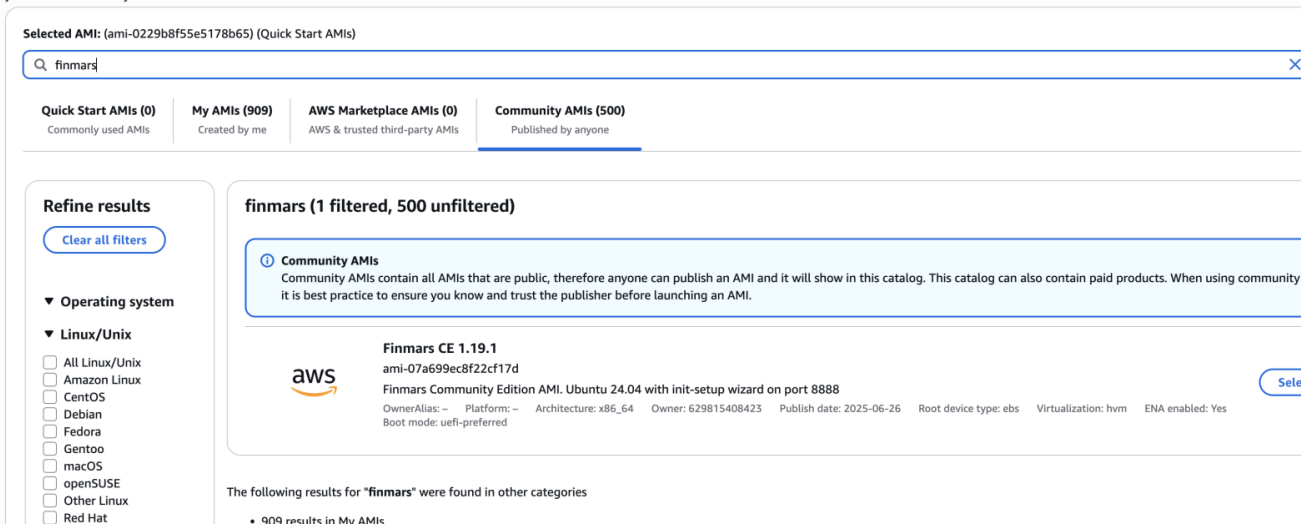
3. Launch a new instance

- Click the blue **Launch instances** button.

4. Name your instance

- In the **Name tag** box, type **finmars-platform-vm**.

5. Choose AMI (Finmars CE x.x.x) - latest version

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- Scroll or search for **Finmars CE (e.g. Finmars CE 19.1.0)** in Communities AMIs tab.
- Click **Select**.

6. Select instance type (2 vCPU, 8 GiB RAM)

- Find and click **t3.large** (it has 2 vCPU and 8 GiB).

7. Create or select key pair

- Choose **Create a new key pair**.
- Name it (e.g. **finmars-platform-vm-key**).
- Click **Create Key Pair** and save the .pem file safely. - **Do not Lose this file, if you lose it, you will not able to connect to your VM again**

8. Configure instance details

- Click **Edit**
- Under **Subnet - No Preference** or pick one (any is fine).
- Turn **Auto-assign Public IP** to **Enable**. (If already enabled - OK)
- Configure Inbound Security Group Rules

- Add Security Group Rule 1
 - Type: **SSH**
 - Source Type: **Anywhere**
 - Port range: **22**
- Add Security Group Rule 2
 - Type: **HTTP**
 - Source Type: **Anywhere**
 - Port Range: **80**
- Add Security Group Rule 3
 - Type: **HTTPS**
 - Source Type: **Anywhere**
 - Port Range: **443**
- Add Security Group Rule 4 - this is important for further Installation
 - Type: **Custom TCP**
 - Source Type: **Anywhere**
 - Port Range: **8888**
- Leave the rest as default.

▼ Network settings

Info

Network

Info

vpc-f12a9c9a | finmars-vpc

Subnet

Info

No preference (Default subnet in any availability zone)

Auto-assign public IP

Info

Enable

Additional charges apply when outside of free tier allowance

Firewall (security groups)

Info

A security group is a set of firewall rules that control the traffic for your instance. Add rules to allow specific traffic to reach your instance.

☒ Create security group
 ☐ Select existing security group

We'll create a new security group called 'launch-wizard-20' with the following rules:

☒ Allow SSH traffic from

Helps you connect to your instance

Anywhere
0.0.0.0/0

☐ Allow HTTPS traffic from the internet

To set up an endpoint, for example when creating a web server

☐ Allow HTTP traffic from the internet

To set up an endpoint, for example when creating a web server

⚠

Rules with source of 0.0.0.0/0 allow all IP addresses to access your instance. We recommend setting security group rules to allow access from known IP addresses only.

See **Edit** in Top Right Corner. Press it

Resource Groups & Tag E... VPC EC2 Route 53 S3

Search results

Type	Protocol	Port range
ssh	TCP	22
Source type	Source	Description - optional
Anywhere	Q Add CIDR, prefix list or security group 0.0.0.0/0	e.g. SSH for admin desktop
▼ Security group rule 2 (TCP, 80, 0.0.0.0/0) Remove		
HTTP	TCP	80
Source type	Source	Description - optional
Anywhere	Q Add CIDR, prefix list or security group 0.0.0.0/0	e.g. SSH for admin desktop
▼ Security group rule 3 (TCP, 443, 0.0.0.0/0) Remove		
HTTPS	TCP	443
Source type	Source	Description - optional
Anywhere	Q Add CIDR, prefix list or security group 0.0.0.0/0	e.g. SSH for admin desktop
▼ Security group rule 4 (TCP, 8888) Remove		
Custom TCP	TCP	8888
Source type	Source	Description - optional
Custom	Q Add CIDR, prefix list or security group	e.g. SSH for admin desktop
Add security group rule		

See Configured Security groups

- Click **Next: Add Storage**.
- Add storage (256 GiB)**
 - Change the size from **8** to **256** in the root volume row.
 - Keep the volume type as **gp3** or **gp2**.
 - Review and launch**
 - Check all your settings.
 - Click **Launch Instance**.
 - Wait for your VM**
 - Click **View Instances**.
 - Wait until its status is **running** and checks pass.
 - Open Finmars Setup in your Web Browser**
 - Go to `http://Your_Public_IP:8888` (for example `http://203.0.113.25:8888`)
 - Proceed with Setup Wizard

Your EC2 named **finmars-platform-vm** is ready! ☐☐

Now you need to assign your Public IP of your freshly created VM to subdomain of your domain.

1. Sign in to AWS

Go to console.aws.amazon.com and log in.

2. Open Route 53

In the top search bar, type **Route 53**, then click the service.

3. Go to Hosted Zones

In the left menu, click **"Hosted zones."**

4. Select your domain

Find and click the zone named your_domain.tld (for example, [example.com](#)).

5. Create the first record

- Click **"Create record."**
- In **Record name**, type [finmars](#) (so full name is [finmars.example.com](#)). - It is Record for Actual Finmars Platform
- For **Record type**, choose **A - IPv4 address**.
- In **Value**, type your EC2 public IP (for example, [203.0.113.25](#)). You can find it in EC2 details
- Leave **TTL** as default (300).
- Click **"Create records."**

6. Create the second record

- Click **"Create record"** again.
- In **Record name**, type [finmars-auth](#) (so full name is [finmars-auth.example.com](#)). - It is Record for Single-Sign-On (SSO) Finmars
- For **Record type**, choose **A - IPv4 address**.
- In **Value**, type the same EC2 public IP.
- Click **"Create records."**

7. Wait a few minutes

DNS needs a little time to spread out. After about 5 minutes, both

- [finmars.example.com](#)
- [finmars-auth.example.com](#)

will go to your VM's public IP.

That's it! Now both sub-domains point to your **finmars-platform-vm** server.

You can verify it by run following command in Terminal (On Mac or Linux)

```
dig finmars.example.com
dig finmars-auth.example.com
```

Output should be like:

```
; <<>> DiG 9.10.6 <<>> finmars.example.com
;; global options: +cmd
;; Got answer:
;; ->>HEADER<<- opcode: QUERY, status: NOERROR, id: 39082
;; flags: qr rd ra; QUERY: 1, ANSWER: 1, AUTHORITY: 0, ADDITIONAL: 1
```



```
;; OPT PSEUDOSECTION:
; EDNS: version: 0, flags:; udp: 4096
;; QUESTION SECTION:
;finmars-platform-vm.finmars.com. IN A

;; ANSWER SECTION:
finmars.example.com. 300 IN A 203.0.113.25

;; Query time: 12 msec
;; SERVER: 192.168.178.1#53(192.168.178.1)
;; WHEN: Wed Jun 11 20:10:02 CEST 2025
;; MSG SIZE rcvd: 76
```

Now go to next step: [Install Finmars Platform](#)

Setup Finmars CE

1. Open Finmars Setup in your Web Browser

- Go to `http://Your_Public_IP:8888` (for example `http://203.0.113.25:8888`)
- Proceed with Setup Wizard

2. You Should see following screen

Finmars Initial Setup

Welcome! This short wizard will help you install Finmars on your server. Please provide the details below and click Continue Setup.

Please, verify your setup with this [Community Guide](#)

You should already assigned Public IP address of that Server to Domain Names

Main Domain:

Auth Domain:

Admin Username:

Admin Password:

[Continue Setup](#)

support@finmars.com | [Documentation](#) | [Github](#)

3. Fill Out form with your Data

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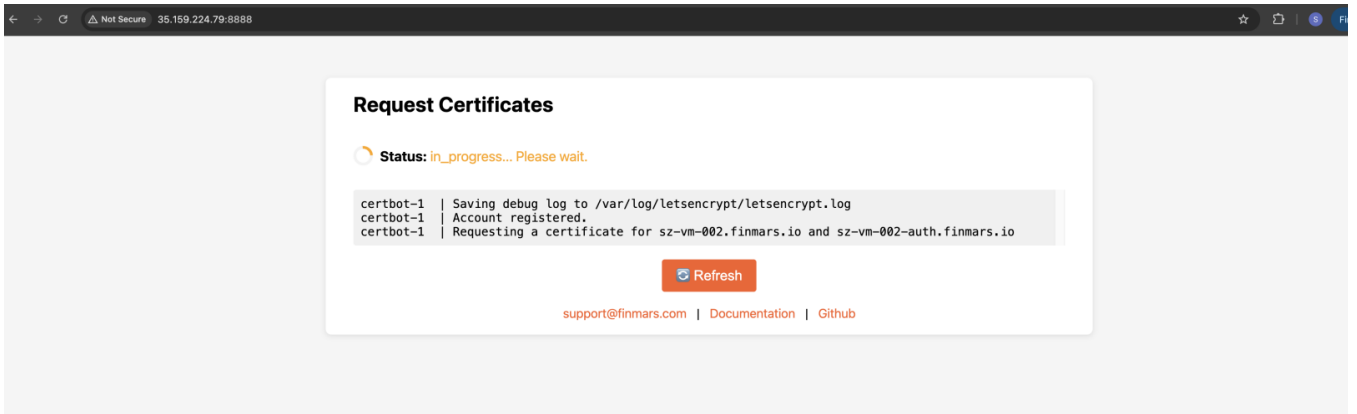
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Admin Password:

[Continue Setup](#)

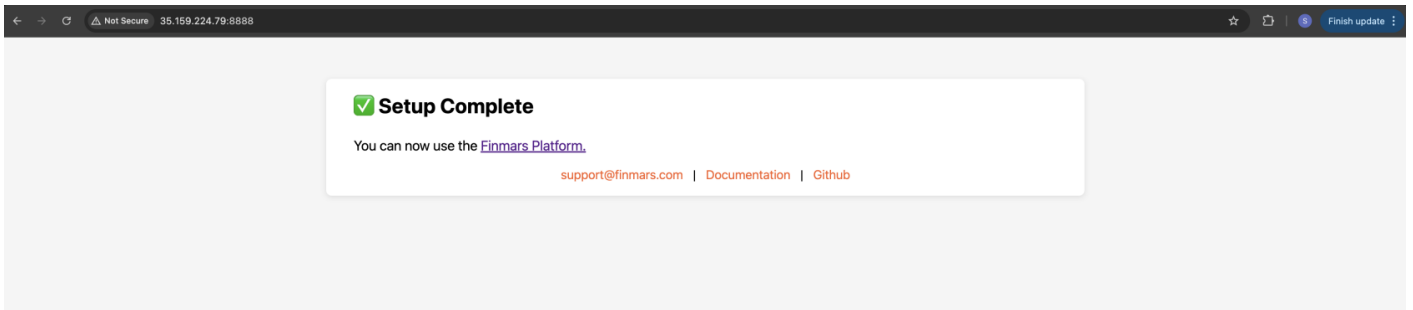
support@finmars.com | [Documentation](#) | [Github](#)

4. Click Continue Setup



5. Wait until Installation is Finished

6. When its Done, proceed to your Installed Finmars CE platform! Well done!



Go to next steps!

- Configure Finmars - Consider our [Guide with Configuring Finmars](#)

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