

Install Finmars Platform

Here is a Full Guide to install Finmars on your Ubuntu VM:

Complete time of full installation is less than 30 minutes, by the end of it you will get a Finmars Platform Installed on your Linux Server

1. Connect to your VM

Example:

```
# if this first connect
chmod 400 finmars-platform-vm.pem

ssh -i ./finmars-platform-vm.pem ubuntu@<Public-IP>

# if this first connect
# Are you sure you want to continue connecting (yes/no/[fingerprint])? yes
# yes
```

2. Install Docker

```
sudo apt update
sudo apt install -y ca-certificates curl gnupg lsb-release ntp

wget -q0- https://get.docker.com/ | sh

sudo usermod -aG docker $USER
newgrp docker
```

To check if Docker installed:

```
docker version
```

Should output:

```
Client: Docker Engine - Community
Version:           28.2.2
...
```

3. Install Make

```
sudo apt install -y make git
```

4. Create the finmars folder

```
sudo mkdir -p /opt/finmars
sudo chown $USER:$USER /opt/finmars
```

5. Clone the Finmars Platform Community Edition repository from Github

See <https://github.com/finmars-platform/finmars-community-edition> repository

```
cd /opt/finmars
git clone https://github.com/finmars-platform/finmars-community-edition.git .
```

6. Create Storage folder

```
mkdir ./storage
sudo chown -R 1000:1000 ./storage
```

7. Configure env

```
make generate-env
```

8. (Optional) Check created env `cat .env`

```
REALM_CODE=realm00000
BASE_API_URL=space00000
SECRET_KEY=2e849ee2
JWT_SECRET_KEY=f0d51adba17320c742fb1f046122ce1a8e22ca679bf7c7df28aa873ed5ca3d7a
ENCRYPTION_KEY=a594c6607a48629884753fe0a6b5a907c6d8be8d63e4c274c67be040c276b1c4

DOMAIN_NAME=ap-finmars.finmars.com
CSRF_COOKIE_DOMAIN=ap-finmars.finmars.com
CSRF_TRUSTED_ORIGINS=https://ap-finmars.finmars.com

PROD_APP_HOST=https://ap-finmars.finmars.com
APP_HOST=https://ap-finmars.finmars.com
PROD_API_HOST=https://ap-finmars.finmars.com
```

API_HOST=https://ap-finmars.finmars.com

KEYCLOAK_REALM=finmars

KEYCLOAK_SERVER_URL=https://ap-finmars-auth.finmars.com

KEYCLOAK_URL=https://ap-finmars-auth.finmars.com

PROD_KEYCLOAK_URL=https://ap-finmars-auth.finmars.com

NUXT_APP_BASE_URL=

DB_HOST=db

DB_PORT=5432

DB_NAME=finmars_dev

DB_USER=finmars_dev

DB_PASSWORD=e21717b7ba0d4287dc292edc3c2164

KC_DB_URL_HOST=db_keycloak

KC_DB_PORT=5432

KC_DB_USERNAME=keycloak

KC_DB_PASSWORD=5de8131f84d79b68ba47d25a922dae92

KC_DB_URL_DATABASE=keycloak

RABBITMQ_HOST=rabbitmq

REDIS_HOST=redis

USE_FILESYSTEM_STORAGE=True

SERVER_TYPE=local

DEBUG=False

USE_DEBUGGER=False

DJANGO_LOG_LEVEL=INFO

PROFILER=False

ENABLE_DEV_DOCUMENTATION=False

EDITION_TYPE=community

ADMIN_USERNAME=test

ADMIN_PASSWORD=test

REDIRECT_PATH="/realm00000/space00000/a/#!/dashboard"

```
MAIN_DOMAIN_NAME=ap-finmars.finmars.com
AUTH_DOMAIN_NAME=ap-finmars-auth.finmars.com
```

9. Release certs

```
make init-cert
```

You should see something like this as successful result:

```
[+] Running 2/2
✓ Network finmars_default      Created
✓ Container finmars-certbot-1   Created
Attaching to certbot-1
certbot-1 | Saving debug log to /var/log/letsencrypt/letsencrypt.log
certbot-1 | Account registered.
certbot-1 | Requesting a certificate for finmars-platform-vm.finmars.com and finmars-platform-vm-auth.finmars.com
certbot-1 |
certbot-1 | Successfully received certificate.
certbot-1 | Certificate is saved at: /etc/letsencrypt/live/finmars-platform-vm.finmars.com/fullchain.pem
certbot-1 | Key is saved at: /etc/letsencrypt/live/finmars-platform-vm.finmars.com/privkey.pem
certbot-1 | This certificate expires on 2025-09-09.
certbot-1 | These files will be updated when the certificate renews.
certbot-1 | NEXT STEPS:
certbot-1 | - The certificate will need to be renewed before it expires. Certbot can automatically renew the certificate in the
certbot-1 |   ound, but you may need to take steps to enable that functionality. See https://certbot.org/renewal-setup for instructions.
certbot-1 |
certbot-1 | -----
certbot-1 | If you like Certbot, please consider supporting our work by:
certbot-1 | * Donating to ISRG / Let's Encrypt: https://letsencrypt.org/donate
certbot-1 | * Donating to EFF: https://eff.org/donate-le
certbot-1 | -----
```

10. Init keycloak

```
make init-keycloak
```

You should see something like this as successful result:

```
[+] Running 3/3
✓ Container finmars-db_keycloak-1 Running
✓ Container finmars-keycloak-1 Started
⏸ Waiting for Keycloak to be ready...
Waiting for Keycloak to be ready...
Keycloak is ready!
✓ Configuring admin credentials...
Logging into http://localhost:8080 as user admin of realm master
+ Creating user admin...
Created new user with id '7d11f9ff-a9e2-4ec7-b141-b57665a9303d'
+ Setting password for user admin...
[+] Running 4/4
✓ Container finmars-keycloak-1 Removed
✓ Container finmars-certbot-1 Removed
✓ Container finmars-db_keycloak-1 Removed
✓ Network finmars_default Removed
✓ Done!
ubuntu@ip-172-31-26-65:/opt/finmars$
```

11. Run database migrations

```
make migrate
```

You should see something like this as successful result:

```
Applying workflow.0016_alter_schedule_options_alter_space_options_and_more... OK
Applying workflow.0017_workflow_finished_at... OK
Applying workflow.0018_workflow_parent... OK
Applying workflow.0019_alter_task_status... OK
Applying workflow.0020_delete_repeated_workflow_templates... OK
Applying workflow.0021_alter_workflowtemplate_options_and_more... OK
Applying workflow.0022_add_export_backend_historical_records_crontab_task... OK
[local] [realm00000] [workflow] [INFO] [2025-06-11 18:52:41,221] [MainProcess] [workflow] [apps:46] - Bootstrapping Workflow Application
[local] [realm00000] [workflow] [INFO] [2025-06-11 18:52:41,221] [MainProcess] [workflow] [apps:50] - bootstrap: Current search path: space00000
[local] [realm00000] [workflow] [INFO] [2025-06-11 18:52:41,225] [MainProcess] [workflow] [apps:79] - bootstrap.creating_new_space: space00000
[local] [realm00000] [workflow] [INFO] [2025-06-11 18:52:41,228] [MainProcess] [workflow] [apps:90] - Finmars bot created User matching query does not exist.
[+] Running 3/3
✓ Container finmars-redis-1 Removed
✓ Container finmars-db-1 Removed
✓ Network finmars_default Removed
✓ Done!
ubuntu@ip-172-31-26-65:/opt/finmars$
```

12. Start all services

make up

You should see something like this and other logs as successful result:

```
ms. Creating cluster as coordinator
keycloak-1 | 2025-06-11 18:58:03,804 INFO [org.infinispan.CLUSTER] (keycloak-cache-init
523312-42008|0) (1) [38c884523312-42008]
keycloak-1 | 2025-06-11 18:58:03,831 INFO [org.infinispan.CLUSTER] (keycloak-cache-init
`, physical addresses are `[172.18.0.10:39145]`
keycloak-1 | 2025-06-11 18:58:03,854 WARN [io.quarkus.agroal.runtime.DataSources] (mai
enabled. Please enable transaction recovery by setting quarkus.transaction-manager.enable-recover
d abruptly
keycloak-1 | 2025-06-11 18:58:03,853 WARN [org.infinispan.CONFIG] (keycloak-cache-init
lobal state enabled
keycloak-1 | 2025-06-11 18:58:05,217 INFO [org.keycloak.broker.provider.AbstractIdentif
vider.mappersync.ConfigSyncEventListener
keycloak-1 | 2025-06-11 18:58:05,263 INFO [org.keycloak.connections.infinispan.Default
2-42008, Site name: null
keycloak-1 | 2025-06-11 18:58:06,382 INFO [org.keycloak.exportimport.dir.DirImportProv
port
keycloak-1 | 2025-06-11 18:58:06,382 INFO [org.keycloak.services] (main) KC-SERVICES00
keycloak-1 | 2025-06-11 18:58:06,975 INFO [org.keycloak.exportimport.util.ImportUtils]
keycloak-1 | 2025-06-11 18:58:06,983 INFO [org.keycloak.services] (main) KC-SERVICES00
keycloak-1 | 2025-06-11 18:58:07,130 INFO [io.quarkus] (main) Keycloak 24.0.3 on JVM (
0.0.0.0:8080
```

To Verify that is everything running

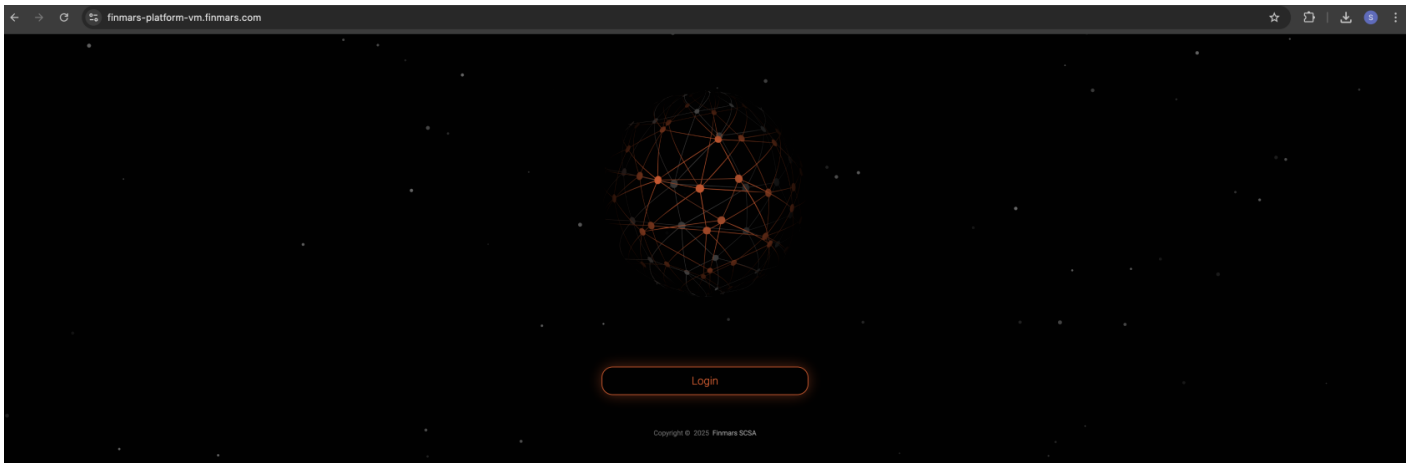
docker ps

And you should see something like:

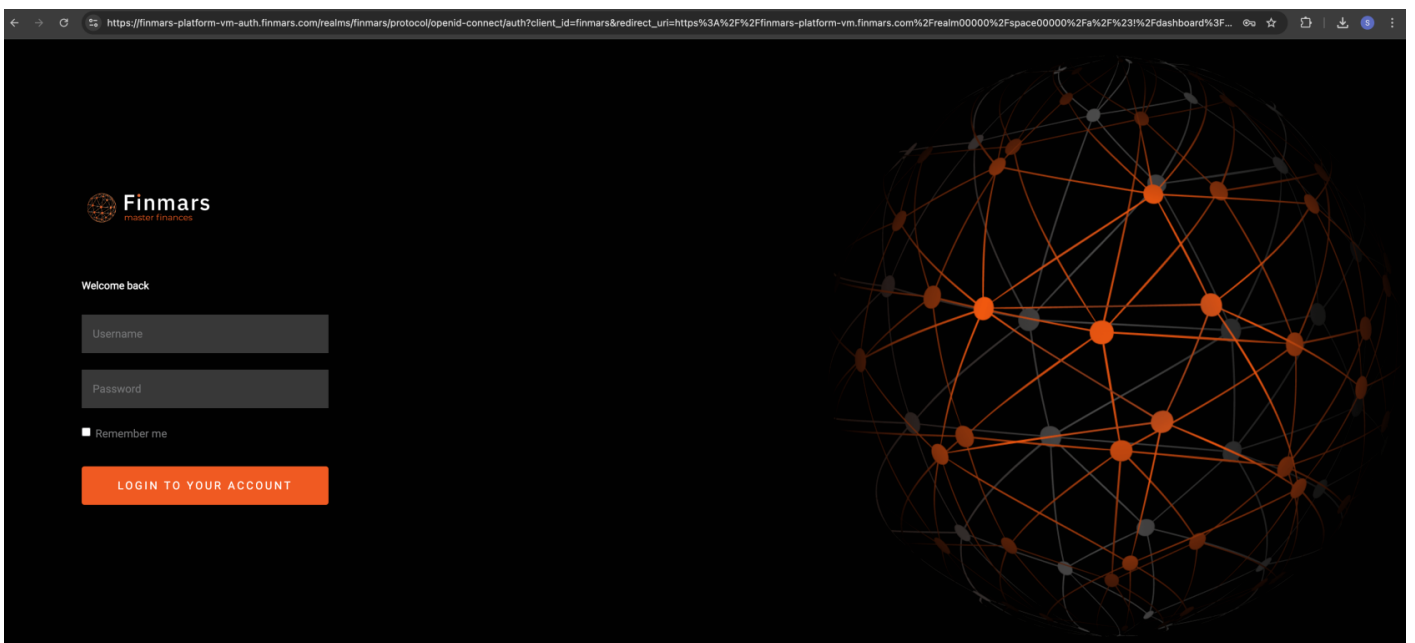
```
ubuntu@ip-172-31-26-65:/opt/finmars$ docker ps
CONTAINER ID   IMAGE                                COMMAND                  CREATED    STATUS    PORTS                               NAMES
2376187a28dd   nginx                                "/docker-entrypoint..." 9 minutes ago Up 3 seconds 0.0.0.0:80->80/tcp, [::]:80->80/tcp, 0.0.0.0:443->443/tcp, [::]:443->443/tcp  finmars-nginx-1
976d3562995    finmars/finmars-core:1.19.0-stable "/gnunicorn poms_app.W..." 9 minutes ago Up 4 seconds 8080/tcp  finmars-core-1
c3727b4d4993   finmars/finmars-workflow:1.19.0-stable "/gnunicorn workflow_a..." 9 minutes ago Up 4 seconds 8080/tcp  finmars-workflow-worker-1
f09c3171f9e8   finmars/finmars-workflow:1.19.0-stable "/gnunicorn workflow_a..." 9 minutes ago Up 4 seconds 8080/tcp  finmars-workflow-1
9a6114148228   finmars/finmars-core:1.19.0-stable "/gnunicorn poms_app.W..." 9 minutes ago Up 4 seconds 8080/tcp  finmars-core-worker-1
6a58e4d3b26c   finmars/finmars-workflow:1.19.0-stable "/gnunicorn workflow_a..." 9 minutes ago Up 4 seconds 8080/tcp  finmars-workflow-scheduler-1
18c884523312   quay.io/keycloak/keycloak:24.0.3   "/opt/keycloak/bin/k..." 9 minutes ago Up 4 seconds 8443/tcp, 0.0.0.0:8084->8080/tcp, [::]:8084->8080/tcp  finmars-keycloak-1
118c4fe4448f   postgres:13-alpine                 "/docker-entrypoint.s..." 9 minutes ago Up 5 seconds 5432/tcp  finmars-db-1
99a0fdb85687   finmars/finmars-portal:1.19.0-stable "/docker-entrypoint.s..." 9 minutes ago Up 5 seconds 0.0.0.0:8080->8080/tcp, [::]:8080->8080/tcp  finmars-portal-1
80b91e5882d0   finmars/finmars-workflow-portal:1.19.1-rc "/var/www/finmars/do..." 9 minutes ago Up 5 seconds 8080/tcp  finmars-workflow-portal-1
11b64c7511c7   finmars/finmars-start-page:1.19.0-stable "node ./server.js"      9 minutes ago Up 5 seconds 8080/tcp  finmars-fimars-start-page-1
d2dd22181a20   rabbitmq                             "/docker-entrypoint.s..." 9 minutes ago Up 5 seconds 4369/tcp, 5671/tcp, 15691-15692/tcp, 25672/tcp, 0.0.0.0:5672->5672/tcp, [::]:5672->5672/tcp  finmars-rabbitmq-1
12ed32774a84   finmars/finmars-vue-portal:1.19.1-rc "/var/www/finmars/do..." 9 minutes ago Up 5 seconds 8080/tcp  finmars-vue-portal-1
8dc7ecce5511   postgres:13-alpine                 "/docker-entrypoint.s..." 9 minutes ago Up 5 seconds 5432/tcp  finmars-db-keycloak-1
f18cf9684d8c   redis                                "/docker-entrypoint.s..." 9 minutes ago Up 5 seconds 0.0.0.0:6379->6379/tcp, [::]:6379->6379/tcp  finmars-redis-1
ubuntu@ip-172-31-26-65:/opt/finmars$
```

It means all the Docker Containers are running.

When all is done, you can Open Web Browser at **finmars.example.com** and you should see **Finmars Welcome Page**

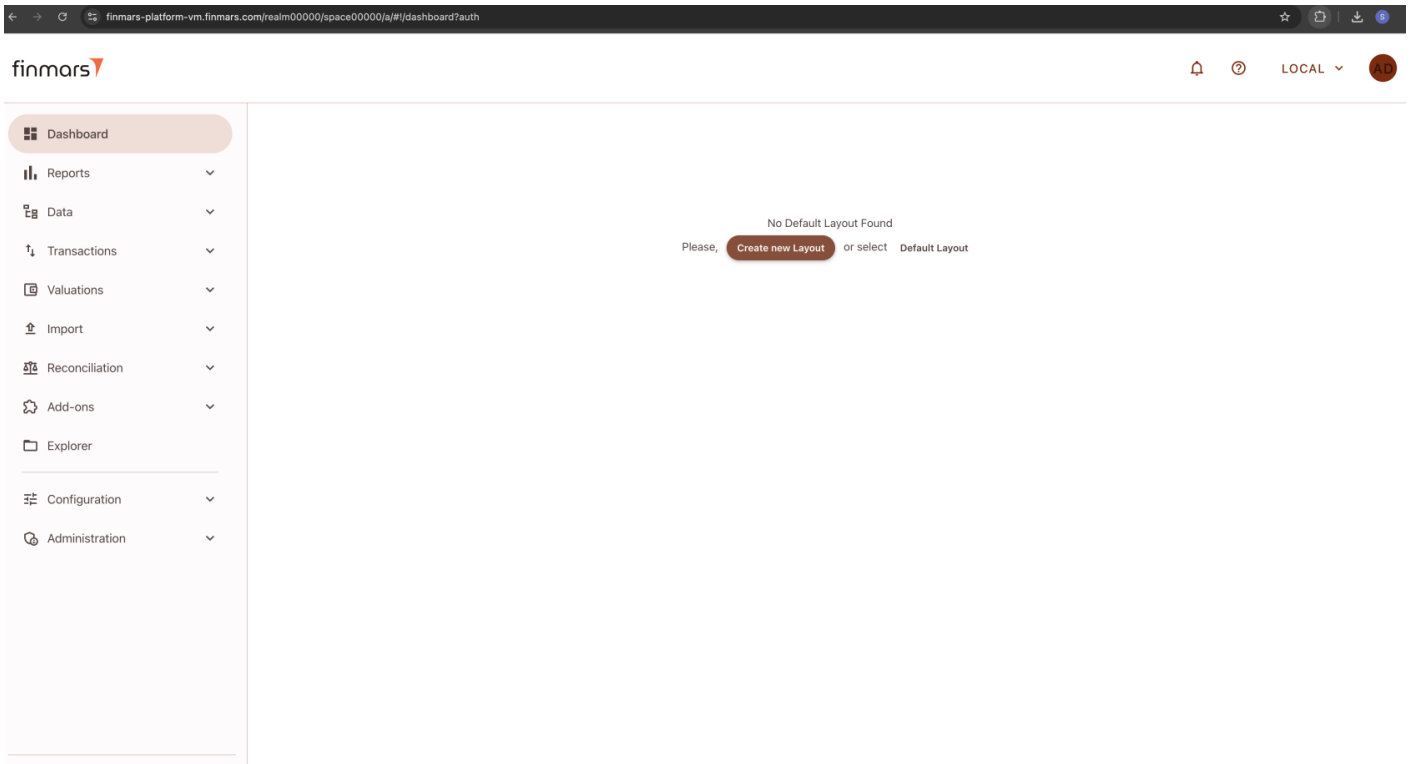


After you press **Login** you will be redirected to **Finmars Single-Sign-On (SSO)** to **finmars-auth.example.com**



Login with your Credentials that you provided in 6) **Configure env** step. It should be yours `ADMIN_USERNAME` and `ADMIN_PASSWORD`

After Login you will be redirected to **Dashboard page** in **Finmars Platform**



Congratulations you finished your **Finmars Platform** Installation **Successfully!** Well Done!

Get to know our [User Quick Start](#) guide for next steps

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

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