

Assign Portfolio to Resource Group

Go to Portfolios

stage.finmars.com/realm03va3/space0yub9/a/#/data/portfolio?auth

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PORT Search for a ...

+ ADD FILTER

Groups	User code	Portfolio type	Name	Short name	Public name	Notes	1st TXN DAT	1st CF DAT
None (5)	-		-	-				
	ch-bnd-20394857		Ms.XX: 20394857	CH-BND-20394857	20394857	Bonds Portfolio (Group A)	2022-12-01	2022-12-01
	CH-CMD-20394857		Ms.XX: 20394857	CH-CMD-20394857	20394857	Commodity Portfolio (Group A)	2023-06-2	2023-06-2
	CH-CYP-75648329		Mr.XY: 75648329	CH-CYP-75648329	75648329	Crypto Portfolio (Group B)	2023-01-01	2023-01-01
	CH-EQ-75648329		Mr.XY: 75648329	CH-EQ-75648329	75648329	Equity Portfolio (Group B)	2023-01-12	2023-01-12

(5 of 5)

Open any Portfolio

Edit Portfolio Last Updated: 09:5 (a day ago)

Portfolio Status

General

Portfolio type

Notes

Auto Populated Fields (do not fill)

First Transaction Date

First Cash Flow Date

Resource Groups

Cancel

You should be able to see Resource Group Input (multiselect dropdown)
If you do not see it, go to Form Constructor and manually add this input to Form

Resource Groups

Portfolio Group A

Looking for

Portfolio Group B

Select Resource Group - Portfolio Group A

And thats it!

User Code
portfolio_group_a

Name
Portfolio Group A

Description

Save Delete

Assignments

	ID	Object ID	User Code	Resource Group	Content Type
X	1	26	ch-bnd-20394857	1	87
X	5	27	CH-CMD-20394857	1	87

Not if you will return back to your Resource Group, you will see that that Portfolio is linked to this Resource Group

Revision #1

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