

Assign Portfolio to Resource Group

Go to Portfolios

finmars

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Search for a ...

ADD FILTER

Groups

None (5)

		User code	Portfolio type	Name	Short name	Public name	Notes	1st TXN DAT	1st CF DAT	
		-		-	-					
		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

PORT

Search for a ...

ADD FILTER

Groups

None (5)

Edit Portfolio

Last Updated: 09:3 (a day ago)

Portfolio

Ms.XX: 20394857

Status

Enabled

General

Portfolio type

Portfolio type

Notes

Bonds Portfolio (Group A)

Auto Populated Fields (do not fill)

First Transaction Date

2022-12-01

First Cash Flow Date

2022-12-01

Resource Groups

Portfolio Group A

Cancel

Save

Save and Exit

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
Created 31 October 2024 11:25:16 by Sergei Zhitenev
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