

Portfolio API

▼

🔍 Search operations

🔍

Group by tag

Show URL path

- POST

Create a Portfolio
- POST

Create a Portfolio Group
- DEL

Delete a Portfolio and related records by ID
- GET

Portfolio by ID
- POST

Portfolio Detail Search
- POST

Portfolio Group Detail Search
- POST

Portfolio Holding Detail Search
- PATCH

Portfolio Updates
- PUT

Update Portfolio By ID
- PUT

Update Portfolio Group By ID

## Portfolio API

Create, manage, and search for details on portfolios using the Portfolio API.

## Create a Portfolio

Creates a portfolio

Portfolio

## Request

**POST** https://api.blackdiamondwealthplatform.com/portfolio/Portfolio

## Request body

application/json

PortfolioDto

{}

Name	Required	Type	Description
id	false	string	
internalId	false	integer (int32)	
name	true	string	
displayName	false	string	
team	false	string	
historyLoaded	false	boolean	
demoPortfolio	false	boolean	
showClient	false	boolean	
adminOnly	false	boolean	
doNotReport	false	boolean	
previousSystemKey	false	string	
accounts	false	PortfolioAccount[]	
targets	false	Target[]	
benchmarks	false	Benchmark[]	
customFields	false	object	

default

DEFAULT - JSON

Copy

```
{  "id": "string",  "internalId": 0,  "name": "string",  "displayName": "string",  "team": "string",  "historyLoaded": true,  "demoPortfolio": true,  "showClient": true,  "adminOnly": true,  "doNotReport": true,  "previousSystemKey": "string",  "accounts": [{    "id": "string",    "ordinal": 0,    "sampleAccountLabel": "string",    "isAddressSourceAccount": true  }],  "targets": [{    "id": "string",    "internalId": 0,    "startDate": "2022-12-14T09:03:13Z",    "endDate": "2022-12-14T09:03:13Z"  }],  "benchmarks": [{    "id": "string",    "internalId": 0,    "ordinal": 0,    "startDate": "2022-12-14T09:03:13Z",    "endDate": "2022-12-14T09:03:13Z"  }],  "customFields": {    "additionalProp1": "string",    "additionalProp2": "string",    "additionalProp3": "string"  },  "goals": [{    "name": "string",    "ordinal": 0,    "benchmark": "string",    "accounts": ["string"]  }],  "portfolioGroups": [{    "id": "string",    "isPrimary": true  }],  "outsideIdentifiers": [{    "label": "string",    "value": "string"  }]}
```

## Response: 201 Created

application/json

default

DEFAULT - JSON

Copy

```
string
```

## Response: 400 Bad Request

application/json

default

DEFAULT - JSON

Copy

```
{  "type": "string",  "title": "string",  "status": 0,  "detail": "string",  "instance": "string"}
```

## Response: 500 Internal Server Error

application/json

default

DEFAULT - JSON

Copy

```
{  "status": 0,  "title": "string",  "detail": "string",  "traceId": "string"}
```

## Definitions

Name	Description
<a href="#">Benchmark</a>	
<a href="#">PortfolioAccount</a>	
<a href="#">PortfolioDto</a>	
<a href="#">Target</a>	

## Benchmark

{}

Name	Required	Type	Description
id	false	string	
internalId	false	integer (int32)	
ordinal	false	integer (int32)	
startDate	false	string (date-time)	
endDate	false	string (date-time)	

## PortfolioAccount

{}

Name	Required	Type	Description
id	false	string	
ordinal	false	integer (int32)	

## PortfolioDto

{}

Name	Required	Type	Description
id	false	string	
internalId	false	integer (int32)	
name	true	string	
displayName	false	string	
team	false	string	
historyLoaded	false	boolean	
demoPortfolio	false	boolean	
showClient	false	boolean	
adminOnly	false	boolean	
doNotReport	false	boolean	
previousSystemKey	false	string	
accounts	false	PortfolioAccount[]	
targets	false	Target[]	
benchmarks	false	Benchmark[]	
customFields	false	object	

## Target

{}

Name	Required	Type	Description
id	false	string	
internalId	false	integer (int32)	
startDate	false	string (date-time)	
endDate	false	string (date-time)	