false

false

true

false

false

false

false

false

false

string

string

string

string

boolean

boolean

boolean

boolean

boolean

string

Target[]

object

Benchmark[]

PortfolioAccount[]

integer (int32)

Description

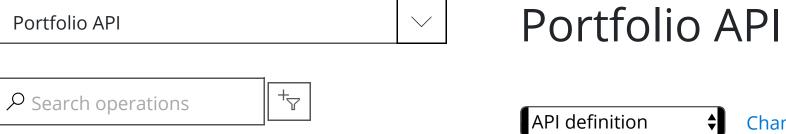
Profile

**П** Сору

<mark>ப்</mark> Copy

**₽** Сору

**₽** Сору



Group by tag

Show URL path

Delete a Portfolio and related records by

**Create a Portfolio** 

Portfolio by ID

**PATCH** Portfolio Updates

DEL

**POST** 

**POST** 

ID

Create a Portfolio Group

Portfolio Detail Search

Update Portfolio By ID

Portfolio Group Detail Search

Portfolio Holding Detail Search

Update Portfolio Group By ID

Changelog

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

Home

## Create a Portfolio Creates a portfolio

Portfolio

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

Request

Request body

application/json

PortfolioDto

{}

Name

id internalId

name displayName team historyLoaded demoPortfolio

showClient adminOnly doNotReport previousSystemKey

false false false accounts false targets benchmarks

false customFields false default DEFAULT - JSON

"id": "string", "internalId": 0, "name": "string", "displayName": "string", "team": "string", "historyLoaded": true, "demoPortfolio": true, "showClient": true, "adminOnly": true, "doNotReport": true,

"previousSystemKey": "string",

"startDate": "2022-12-14T09:03:13Z",

"endDate": "2022-12-14T09:03:13Z"

"additionalProp1": "string",

"additionalProp2": "string",

"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,

"customFields": {

}],

}]

Created

application/json

string

"accounts": [{

"additionalProp3": "string" }, "goals": [{ "name": "string", "ordinal": 0, "benchmark": "string", "accounts": ["string"] }], "portfolioGroups": [{ "id": "string", "isPrimary": true }],

"outsideIdentifiers": [{

"label": "string",

"value": "string"

default DEFAULT - JSON

Response: 400 Bad Request

Response: 201 Created

application/json

default

**Bad Request** 

DEFAULT - JSON

"type": "string", "title": "string", "status": 0, "detail": "string", "instance": "string"

Response: 500 Internal Server Error

default DEFAULT - JSON

"status": 0,

"title": "string",

"detail": "string",

"traceId": "string"

Internal Server Error

application/json

Benchmark PortfolioAccount PortfolioDto

Benchmark

**■** { }

Name

Target

Definitions

id internalId ordinal

startDate

Name

endDate PortfolioAccount {} Name

id

id

internalld

name

targets

Target

Name

internalld

startDate

endDate

id

customFields

{}

ordinal PortfolioDto {} Name

displayName team historyLoaded demoPortfolio

showClient adminOnly doNotReport previousSystemKey accounts

benchmarks

false false false false false false false false false false

Required false false true false false

Description

Required

false

false

false

false

Required

false

false

Type

Type

string

integer (int32)

string

integer (int32)

integer (int32)

string (date-time)

string (date-time)

string

Type

integer (int32) string string string boolean

boolean

boolean

boolean

boolean

string PortfolioAccount[]

Target[] Benchmark[]

Required

Type

false

false

false

false

Powered by Azure API Management.

object

string integer (int32) string (date-time) string (date-time)

**Description** 

**Description** 

**Description** 

Description