

# Margin Service API - Portfolio - Add

The add portfolio request creates a new portfolio into the CME CORE database.

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<b>Entity</b>	Portfolio
<b>Action</b>	Add
<b>URL</b>	/portfolios
<b>HTTP Method</b>	POST
<b>Parameter Input</b>	No
<b>XML Input</b>	Yes
<b>Multiple Output</b>	No
<b>Synchronous</b>	Yes

## Description

This request allows the Client to add or create a new portfolio in CME CORE. The Client must here submit the required attributes (specified below) for a new portfolio following which the server validates the request. Every transaction must be submitted separately. If the request is invalid, the server returns a status and an error message/code and if the request is valid, an internal identifier for the request along with the status are returned.

## Request

XPath	Name	Type	Required	Notes
/portfolioReq@reqUserId	Requesting User ID	String	No	
/portfolioReq/portfolio@desc	Description	String	No	
/portfolioReq/portfolio@name	Name	String	No	
/portfolioReq/portfolio@rptCcy	Reporting Currency	Currency	No	Defaults to USD
/portfolioReq/portfolio/entities@clrMbrFirmId	Clearing Member Firm ID	String	No	
/portfolioReq/portfolio/entities@custAcctId	Customer Account ID	String	No	

**Note:** If No Clearing Member Firm ID and Customer Account ID is supplied, these fields will be supplied with default values.

Clearing Member Firm ID will default to 'Test' and Customer Account ID will default to '1234'

## Response

XPath	Name	Type	Required	Notes
/portfolioRpt/error@code	Error Code	String	No	
/portfolioRpt/error@msg	Error Message	String	No	
/portfolioRpt/portfolio@createTime	Create Time	Date/Time	Yes	
/portfolioRpt/portfolio@desc	Description	String	No	
/portfolioRpt/portfolio@id	Portfolio ID	String	Yes	
/portfolioRpt/portfolio@name	Name	String	No	
/portfolioRpt/portfolio@rptCcy	Reporting Currency	Currency	Yes	
/portfolioRpt/portfolio@updateTime	Update Time	Date/Time	Yes	
/portfolioRpt/portfolio/entities@clrMbrFirmId	Clearing Member Firm ID	String	Yes	

/portfolioRpt/portfolio/entities@custAcctId	Customer Account ID	String	No	
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## Errors

Code	Description
400	Bad XML syntax or missing content. More information will be provided in the error message.
403	Returned if the user does not have permission to add a portfolio.
500	The server was not able to process the request. More information (if available) will be provided in the error message.

## Examples

### Valid

#### Request

```
POST {Margin Service API URL}/portfolios
```

```
<?xml version="1.1" encoding="UTF-8" standalone="yes"?>
<ns2:portfolioReq xmlns:ns2="http://cmegroup.com/schema/core/1.1">
  <portfolio desc="My Desc" name="My Name" rptCcy="AUD" id="0"><entities clrMbrFirmId="My Firm" custAcctId="
  My Account" /></portfolio></ns2:portfolioReq>
```

#### Response

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<ns2:portfolioRpt xmlns:ns2="http://cmegroup.com/schema/core/1.2" status="SUCCESS">
  <portfolio desc="My Desc" name="My Name" rptCcy="AUD" id="53224376" createTime="2017-03-17T15:08:38+00:
  00" updateTime="2017-03-17T15:08:38+00:00">
    <entities clrMbrFirmId="My Firm" custAcctId="My Account" />
  </portfolio>
</ns2:portfolioRpt>
```