

quotemedia

Portfolio Web Services

Overview

The QuoteMedia Portfolio Web Service is offered over SOAP. Connections must be made to the server over HTTPS and must be authenticated by providing the client member's webmaster Id and password when requesting credentials. Portfolio functions are performed on a single-user basis where each individual user is distinguished by their own distinct user name.

Functions

Portfolio Web Services consists of the following seven functions:

- createPortfolio
- updatePortfolio
- listPortfolios
- getPortfolio
- removePortfolio
- getUserPFSettings
- getWebmasterPFSettings

The first five functions listed are responsible for creating, updating, listing, retrieving, and deleting portfolios.

The last two functions are responsible for retrieving portfolio settings at the user and webmaster levels.

The formal definitions of the types that are employed by these functions can be found at <http://app.quotemedia.com/services/Portfolio?wsdl>

createPortfolio

| <u>Input Types</u> | <u>Description</u> |
|----------------------|---|
| String | User name of portfolio assignee |
| PortfolioDetailsBean | 3 items: <ul style="list-style-type: none">• Portfolio ID (ignored)• Portfolio name• Portfolio Sequence |

updatePortfolio

| <u>Input Types</u> | <u>Description</u> |
|--------------------|---|
| String | User name of portfolio owner |
| PortfolioBean | 8 items: <ul style="list-style-type: none">• Symbol• Shares• Purchase Price• Purchase Date• High Alert• Low Alert• Volume Alert• Commission Paid |

listPortfolios

| <u>Input Type</u> | <u>Description</u> |
|--------------------------------|--|
| String | User name of portfolio assignee |
| <u>Output Type</u> | <u>Description</u> |
| Array of PortfolioDetailsBeans | 3 items: <ul style="list-style-type: none">• Portfolio ID (Quotemedia #)• Portfolio name• Portfolio Sequence |

getPortfolio

| <u>Input Types</u> | <u>Description</u> |
|----------------------|--|
| String | User name of portfolio assignee |
| PortfolioDetailsBean | 3 items: <ul style="list-style-type: none">• Portfolio ID (Quotemedia #)• Portfolio name• Portfolio Sequence |
| <u>Output Type</u> | <u>Description</u> |

| | |
|---------------|---|
| PortfolioBean | 8 items: <ul style="list-style-type: none">• Symbol• Shares• Purchase Price• Purchase Date• High Alert• Low Alert• Volume Alert• Commission Paid |
|---------------|---|

removePortfolio

| <u>Input Types</u> | <u>Description</u> |
|----------------------|--|
| String | User name of portfolio assignee |
| PortfolioDetailsBean | 3 items: <ul style="list-style-type: none">• Portfolio ID (Quotemedia #)• Portfolio name• Portfolio Sequence |

getUserPFSettings

| <u>Input Types</u> | <u>Description</u> |
|--------------------|--|
| String | User name of portfolio assignee |
| <u>Output Type</u> | <u>Description</u> |
| String | Comma separated string value (i.e. 10,100) where the first number is the maximum number of portfolios and the second number is the maximum |

number of symbols per portfolio.

If no user level settings exist, webmaster level settings are returned.

getWebmasterPFSettings

| <u>Input Types</u> | <u>Description</u> |
|--------------------|---|
| String | Webmaster ID, as provided by QuoteMedia |
| <u>Output Type</u> | <u>Description</u> |
| String | Comma separated string value (i.e. 10,100) where the first number is the maximum number of portfolios and the second number is the maximum number of symbols per portfolio. If no webmaster level settings exist or if the username is invalid, "0,0" is returned. |

Sample Code

Please refer to <http://www.quotemedia.com/docs/webservices/portfolioSampleCode.zip> for sample code.

Please note that while every effort is made to provide reliable service, internet-based transactions are not fault-proof. As such, we highly recommend that all web services related code contain data validation and error-handling routines to ensure that portfolios are created and updated as intended.