



# Hidden Levers

## **Addepar Integration**

*Version 3.0*

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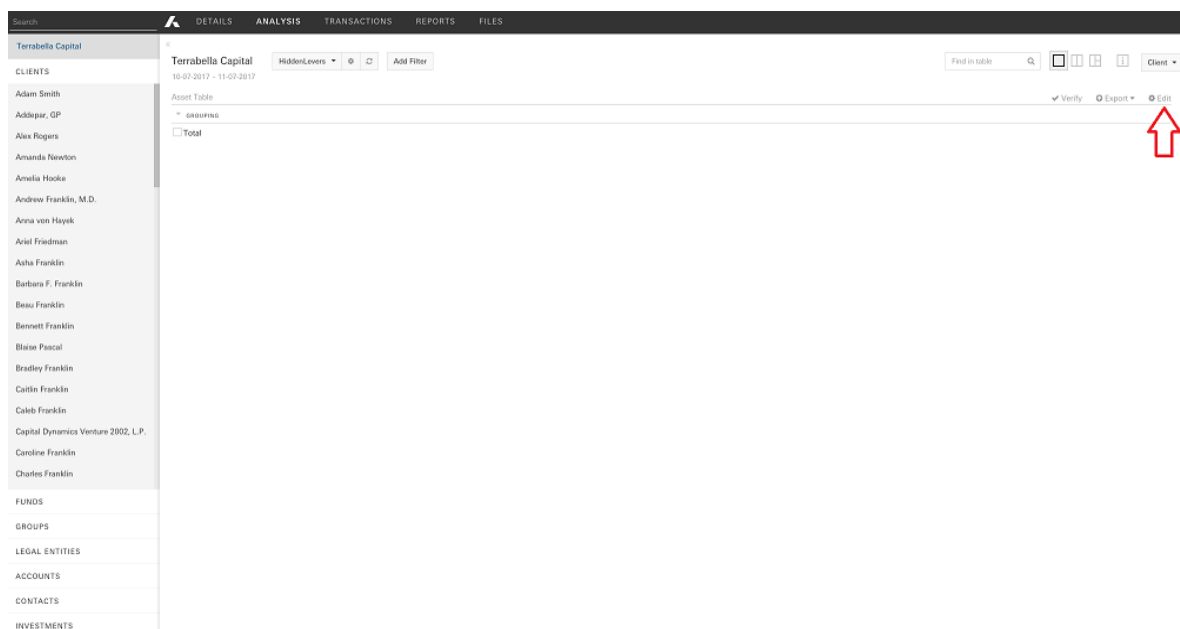


## Steps To Set Up The Addepar Integration

Log in to Addepar and Create the HiddenLevers view:

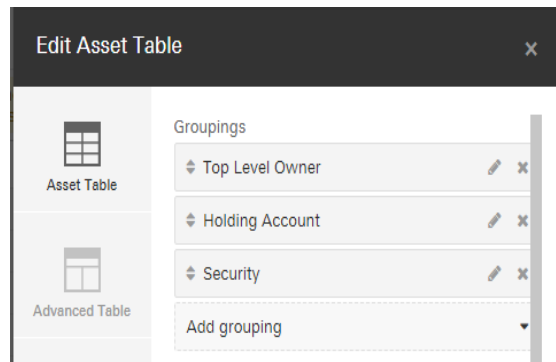
Click on the Top Level Group and select the Edit button – top right.

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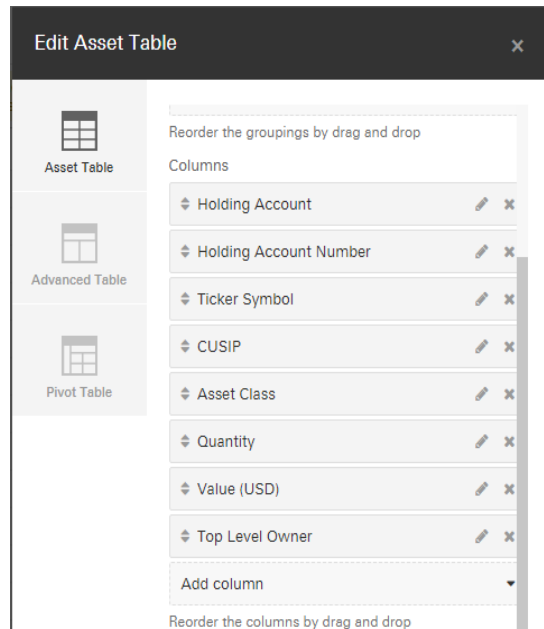
## Create Groupings

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## Create Columns

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Save the view as "Hiddenlevers View"

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**Terrabella Capital**

10-07-2017 - 11-07-2017

Asset Table

▼ GROUPING

Total

HiddenLevers ▼ ⚙️ ↺ Add Filter

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**FIRM VIEW**

- Admin - Billing Overview
- Admin - Fixed Income T&C Audit
- Admin - PE Distributions by Type**
- Admin - Security Attribute Audit
- Advance Table - Balance Sheet
- Asset Class - Equity
- Asset Class - Fixed Income
- Asset Class - Hedge Fund
- Asset Class - Illiquids
- Asset Class - Illiquids Performance
- Asset Class - Private Equity

Save View

Save As New View

Save to Report

Go to the HiddenLevers View  
Click on the Export-> Generate API URL

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The screenshot shows a software interface with a dark header bar containing navigation tabs: DETAILS, ANALYSIS, TRANSACTIONS, REPORTS, and FILES. Below the header, the main content area displays 'Terrabella Capital' with a date range of '10-07-2017 - 11-07-2017'. A dropdown menu is open, showing 'HiddenLevers' as the selected view, with an 'Add Filter' button next to it. To the right, there is a search bar labeled 'Find in table' and a 'Client' dropdown. Below the search bar, there are three icons: a square, a grid, and a list. A 'Verify' dropdown is also visible. The 'Export' dropdown menu is open, showing options for 'Download File' and 'Generate API URL'. The 'Generate API URL' option is highlighted. Below the main content area, there is a small blue rectangular button.

Copy the URL and Save to notepad or a document

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Generate API URL ×

Copy the API URL:

[Copy Link](#)

You can use this API URL to access the current portfolio data displayed in this view from an External application like Microsoft Excel Power Query.

[Close](#)

Now Get the API Key and Secret.

Navigate to this screen.

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The screenshot displays a web application interface for 'Terrabella Capital'. At the top, there is a navigation bar with tabs for 'DETAILS', 'ANALYSIS', 'TRANSACTIONS', 'REPORTS', and 'FILES'. Below this, a search bar is visible. The left sidebar is titled 'CLIENTS' and lists several names, with 'Terrabella Capital' highlighted. The main content area shows the details for 'Terrabella Capital', including a date range of '10-07-2017 - 11-07-2017' and an 'Asset Table'. The table currently shows a 'Total' row. On the right side, there is a 'Firm Settings' and 'Personal Settings' menu with options like 'Help Guide', 'Change Password', 'Enable Two-factor Authentication', 'Contact Support', and 'Logout'.



## Click on the + button and create a key

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### API Access Key

API keys are authentication credentials for the Addepar API. Each API key is paired with an API secret shared only with its creator. Both the key and the secret are required to authenticate API requests.

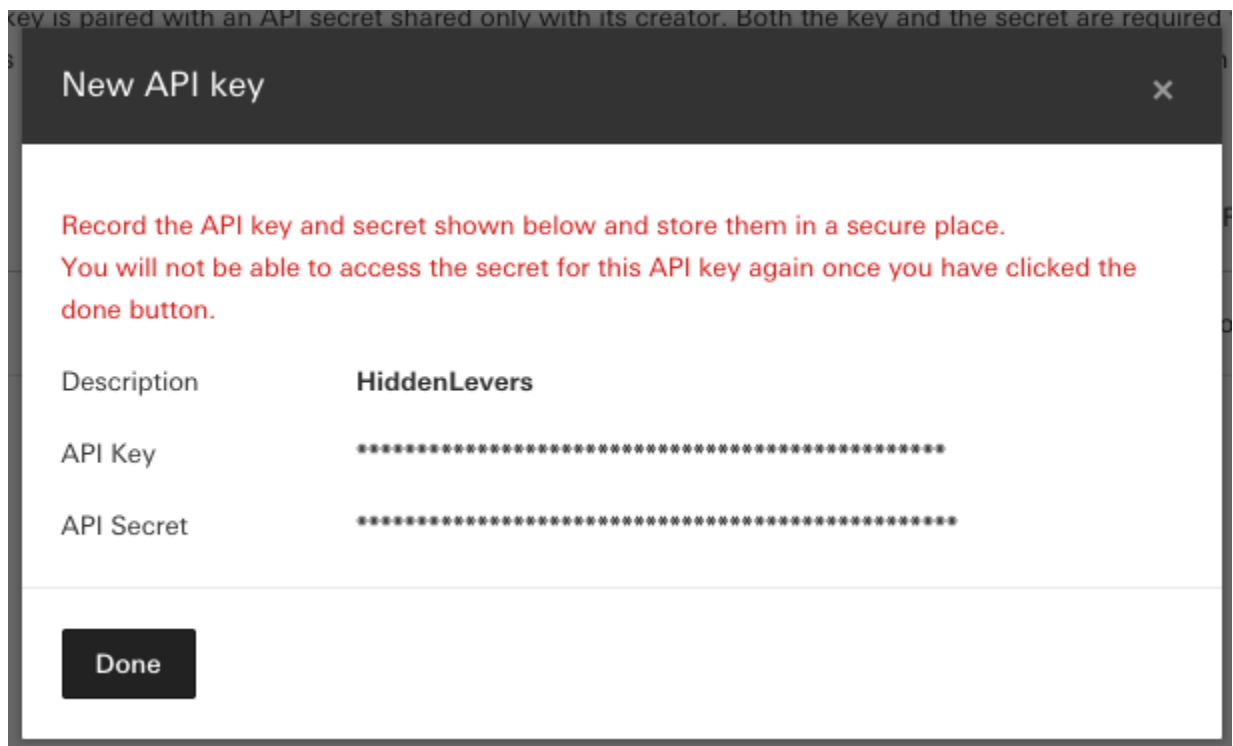
Each key grants access to the data its creator has permission to access in Addepar. To protect your data, store each API key/secret combination in a secure location. A firm admin should also monitor which keys are being used and delete any that are obsolete.

Display all user keys

DESCRIPTION	API KEY	CREATED ON	LAST USED ON	
HiddenLevers	*****	Today at 10:10 am		 

Create a new key called "HiddenLevers". Copy the key and secret to notepad or a document. You will need it later.

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Now log into HiddenLevers  
Navigate to the Integrations Page and select Addepar.

Search...

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- up eMoney Sync
- up Envestnet Tamarac Sync
- he LPL Branchnet Integration

t Activity

## Integrations

### Sync Portfolios

Click on the partner logos to enable/disable portfolio sync. Your active integrations will be highlighted.

Sir

Cli


File

Cli

Enter the API Key, Secret and URL from above.

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**Import Portfolio** ✕

Custodian/Software:  **ADDEPAR**

API Key:

secret:

Url:

Account sync is currently Off

To begin importing portfolios, please contact Addepar.

[Activate](#)

Click on "Activate" and wait for success or errors. This load will take 10-15 minutes.

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Custodian/Software:



API Key:

secret:

Url:

Account sync is currently Off

To begin importing portfolios, please contact Addepar.

Activate