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Upvest API documentation  
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## Creating accounts

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[ ] ([https://docs.upvest.co/products/tol/guides/accounts/accounts\\_create\\_accounts](https://docs.upvest.co/products/tol/guides/accounts/accounts_create_accounts)  
#prerequisites) Prerequisites

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You must have

- [created a user] ([https://docs.upvest.co/products/tol/guides/users/users\\_onboarding\\_create](https://docs.upvest.co/products/tol/guides/users/users_onboarding_create))  
.
- [created an account group] ([https://docs.upvest.co/products/tol/guides/accounts/accounts\\_create\\_account\\_groups](https://docs.upvest.co/products/tol/guides/accounts/accounts_create_account_groups)).

After the creation of the account group, you can now setup an account with:

POST [ `/accounts` ] ([https://docs.upvest.co/api/accounts/create\\_account](https://docs.upvest.co/api/accounts/create_account))

### Example

- Example request
- Example response

```
{  
  "user\_id": "413715f2-5401-4b97-8055-034a6b879f8c",  
  "account\_group\_id": "fa2414ed-8d62-46fd-85ed-565a340c81d6",  
  "type": "TRADING",  
  "name": "Main account"  
}
```

Parameter	Description
:---	:---
`user_id`	The ID of the user to be associated with this account.
`account_group_id`	The ID of the account group to be associated with this account.

| `type` | Specify the type `TRADING` or `PORTFOLIO` for this account. |  
| `name` | Optionally, you can provide a nickname for the account that can be used for reporting purposes. |

The account will be created with the `PENDING\_APPROVAL` status and switches to `ACTIVE` as soon as the user onboarding process is completed.

Furthermore, you will receive a webhook with the respective [account created event] ([https://docs.upvest.co/api/accounts/account\\_event](https://docs.upvest.co/api/accounts/account_event)). As soon as all prerequisites for activating the account are passed, you also receive an [account activated event] ([https://docs.upvest.co/api/accounts/account\\_event](https://docs.upvest.co/api/accounts/account_event)).

Webhooks notify you of events in business processes, not the success or failure of the initialisation of those processes.

Please be sure to check the [HTTP status] ([https://docs.upvest.co/api\\_errors](https://docs.upvest.co/api_errors)) of the response to your requests and handle failure cases appropriately.

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[ ] ([https://docs.upvest.co/products/tol/guides/accounts/accounts\\_create\\_accounts#account-status](https://docs.upvest.co/products/tol/guides/accounts/accounts_create_accounts#account-status)) Account status

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The following status apply to an account:

Status	Description
:---	:---
`PENDING_APPROVAL`	Account approval is pending - the account is visible via our API but cannot be acted on.
`ACTIVE`	Account is active - full functionality of the Investment API is accessible.
`LOCKED`	Account is locked for all actions.
`CLOSING`	Account is closing - only sell orders or the transfer of positions out are permissible before the account is closed.
`CLOSED`	Account is closed with zero balance successfully.

##

[ ] ([https://docs.upvest.co/products/tol/guides/accounts/accounts\\_create\\_accounts#listing-accounts](https://docs.upvest.co/products/tol/guides/accounts/accounts_create_accounts#listing-accounts)) Listing accounts

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You can list all accounts of a specific user with

-  
GET[ `/users/{user\_ID}/accounts` ] ([https://docs.upvest.co/api/accounts/list\\_user\\_accounts](https://docs.upvest.co/api/accounts/list_user_accounts))

All accounts can be listed with

- GET  
[ `/accounts` ] ([https://docs.upvest.co/api/account-groups/list\\_account\\_groups](https://docs.upvest.co/api/account-groups/list_account_groups))

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[ ] ([https://docs.upvest.co/products/tol/guides/accounts/accounts\\_create\\_accounts\\_next-steps](https://docs.upvest.co/products/tol/guides/accounts/accounts_create_accounts_next-steps))Next steps