

Description

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Description

Financial meaning

It stores the data of an individual client. It provides a single point of access to user data and **API** keys (third-party services) associated with customer portfolios.

Platform abstraction

A **Client** in Finmars platform is a container for client information, this entity is referenced by:

- [client_secret](#) an entity that stores the API keys to the brokers, one client's connection to many secrets.
- [portfolio](#) container for financial assets, one client's connection to many portfolios.

Examples

Name	Short Name	Public Name	First Name	Last Name	User code	Notes	Email	Phone
J-Doe	J-Doe	J-Doe	Josh	Doe	client-00	-	J.Doe@bank-c.com	+8812345

- **User code**: workspace unique identifier of the client
- **Name**: full name
- **Short name**: short name, showed in other relations
- **Public name**: public view name for users without access
- **First name**: public view name for users without access
- **Last name**: public view name for users without access

- **Notes**: custom description
- **Email**: client's email
- **Phone**: client's phone number (5-15 digits long)

Cookbook

CRUD

Operations within platform.

Use Cases

What for it's used.

F.A.Q.

Frequently asked questions.

API documentation

Link to API documentation.

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