

# Description

## Table of Contents

- [Description](#)
- [Examples](#)
- [Cookbook](#)
- [F.A.Q.](#)
- [API Documentation](#)

## 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.

---

Revision #2

Created 28 January 2025 12:20:08 by Yaroslav

Updated 28 January 2025 13:09:41 by Yaroslav