

Finmart to Finmars

Overview

The **Finmars-to-Finmars** module enables exporting and sending data from a common Finmars controlling space (which includes multiple portfolios) to a private client space.

Exported Data Includes:

- **Portfolio**
- **Account**
- **Currency**
- **Instrument**
- **Counterparty**
- **Responsible**
- **Complex Transaction**
- **Price History**
- **Currency History**
- **Portfolio History**

Requirements

- Both the sender and recipient spaces must have **standard configurations** (same versions).
- [Installation](#)
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Installation

1. In the **sender space**, navigate to **Add-ons → Marketplace**.
2. Locate the **Finmars-to-Finars** module and install it.
3. Go to **Workflow → Schedules**:
 - URL format: `https://{domain_name}/{realm_code}/{space_code}/w/schedule`
4. Create a new schedule and fill out the form with the following details:

Field	Value
usercode	Unique name
name	Name of the schedule
workflow user code	<code>com.finmars.finmars-to-finmars:init-export</code>
crontab	<code>* * * * *</code> (Format: Minute, Hour, Day of Month, Month, Day of Week)
notes	Optional notes
payload	<code>{}</code> (Empty JSON)
manager	Select <code>"Yes"</code>
enabled	Select <code>"Yes"</code>

5. Wait for the space data to be exported to storage. You can check the exported data in **Explorer → "export_data" folder**.

Usage

Obtaining a JWT Token

You can retrieve a JWT token via an API **POST request** using the following URL pattern:
https://{domain_name}/{realm_code}/{space_code}/api/v1/auth-tokens/personal-access-token/create-token/

Sending Data for a Single Portfolio

1. In the **sender space**, go to **Workflow → Home**.
2. Locate and run the workflow with **user code: com.finmars.finmars-to-finmars:send**
3. Use the following **payload data format** when running the workflow:

```
{
  "portfolio_code": "<The portfolio code in the current space>",
  "export_date": "<The date of the export>",
  "domain_name": "<The domain name of the private client space>",
  "realm_code": "<The realm code of the private client space>",
  "space_code": "<The space code of the private client space>",
  "jwt_token": "<The JWT token for accessing the private client space>"
}
```

Sending Data for a Date Range

1. In the **sender space**, go to **Workflow → Home**.
2. Locate and run the workflow with **user code: com.finmars.finmars-to-finmars:send**
3. Use the following **payload data format**:

```
{
  "export_date_from": "<Start date of the export>",
  "export_date_to": "<End date of the export>",
  "domain_name": "<The domain name of the private client space>",
  "realm_code": "<The realm code of the private client space>",
  "space_code": "<The space code of the private client space>",
  "jwt_token": "<The JWT token for accessing the private client space>"
}
```

