

The Firms and Teams API allows SEI clients to create, read, update, and delete firms as well as teams within firm for their instance of the SEI Trade application.

**TAGS:** fulfillment, onboarding, trade, CRM,

**ENDPOINT:** Firms

**ENDPOINT DESCRIPTION:**

This API call gets all Firms in SEI Trade.

**PROD URL:** <https://api.seic.com/v1/trade/firms>

**TEST URL:** <https://test.api.seic.com/v1/trade/firms>

**TLS URL\*:** <https://mtls.api.seic.com/v1/trade/firms>

\*The TLS endpoint is only used if Server Based Application was selected during the App Registration process.

**STEP 1**

OAuth Token

Once you have minted the OAuth token, retrieve the full list of firms.

**REQUEST PARAMETERS:**

Name	Description	Data Type	Parameter Type
Authorization	access_token value obtained from the Token endpoint. This is passed as "Bearer access_token "	string	header
AppKey	This is the Consumer Key provided during the App Registration process and is used to identify the user's application.	string	header
Content-Type	This is the content type of the payload being passed. Valid value is application/json.	string	header
X-SEIC-CURRENT-USER-CONTEXT	Email address of the user authenticated into the application to view data.	string	header

**SAMPLE REQUEST:**

```
curl -X GET \  
  https://api.seic.com/v1/trade/firms \  
  -H 'appkey: gsedgaerhDSHGRSH' \  
  -H 'authorization: Bearer ADsgdnnkjnfIKJN' \  
  \
```

**REQUEST HEADER:**

```
Authorization: Bearer ADsgdnnkjnfIKJN  
AppKey: gsedgaerhDSHGRSH
```

**RESPONSE PAYLOAD MODEL:**

Name	Description	Data Type(L)
firmId	The identifier of the firm.	string
firmName	The full name of the firm or client.	string
userShare	An enumerated list where values are 'true' or 'false'.	string
firmRoles	The role(s) associated with the firm.	array
roleName	The role name(s) associated with the user.	string
rolePermissions	An enumerated list where values are 'true' or 'false'.	object
viewPipeline	An enumerated list where values are 'true' or 'false'.	boolean
editPipeline	An enumerated list where values are 'true' or 'false'.	boolean
viewDetails	An enumerated list where values are 'true' or 'false'.	boolean
editDetails	An enumerated list where values are 'true' or 'false'.	boolean
submitRequests	An enumerated list where values are 'true' or 'false'.	boolean
reviewApprove	An enumerated list where values are 'true' or 'false'.	boolean
paging	Displays details associated with pagination of the response to support navigation.	object
totalCount	The total number of records.	string
first	API URL for the first page of data with respect to the request context.	string
last	In pagination, this is the ID that points to the start of the last page.	string
next	URL to the next page of records with respect to the API request.	string
self	Current Request URL.	string
previous	API URL for the previous page of data with respect to the request context.	string
limit	Number of records per page. Many responses have a maximum of 50 records per page.	number

**RESPONSE ERRORS:**

Name	Description
200	OK- The request has succeeded and the response has been returned.
400	Bad request - The server cannot or will not process the request due to an inaccurate request submitted by the client application. Please resubmit the request after making the required corrections indicated in the error response. For more Info on SEI Error Standards please refer to the API Standards FAQ under Support.
401	Unauthorized - Invalid authentication details have been provided. Also useful to trigger an authorization pop up if the API is used from a browser.
403	Forbidden-The SEI Server understood the request but refuses to fulfill it.
404	Not Found- The requested resource or the underlying resource does not exist. Please resubmit the request after making the required corrections
500	Internal Server Error - The SEI server was unable to fulfill the request due to an unknown condition. Please contact SEI for support. For More Info please refer to the "Response & Errors" FAQ under support.

**SAMPLE RESPONSE:**

```
{
```

```
"data": [  
  {  
    "firm": "string",  
    "firmName": "string",  
    "userShare": true,  
    "firmRoles": [  
      {  
        "roleName": "string",  
        "rolePermissions": {  
          "viewPipeline": true,  
          "editPipeline": true,  
          "viewDetails": true,  
          "editDetails": true,  
          "submitRequests": true,  
          "reviewApprove": true  
        }  
      }  
    ]  
  }  
],  
"paging": {  
  "totalCount": 0,  
  "limit": 0,  
  "first": "string",  
  "last": "string",  
  "previous": "string",  
  "next": "string",  
  "self": "string"  
}
```

**RESPONSE HEADER:**

```
Content-Type: application/json  
Status: 200 OK  
requesttrackingid: 67e1ff68-164f-03ad-0f2d-5cbbfda56ec9
```