Belvo Customer Success Engineer Case Challenge

- How do you handle the 2FA for link creation at Belvo? What if the token expired?
  - To be able to use Belvo's API we need to create a secret id and password, but for the widget will be necessary to create a token in the backend with a refresh method.

```
→  ~ curl -X POST \
https://sandbox.belvo.co/api/token/ \
-H 'Content-Type: application/json' \
-H 'Host: sandbox.belvo.com' \
-d '{
  "id": "1ae5106b-97f9-43ee-b74e-c391ed934c29",
  "password": "F8-NBhDrMH#l92vtlOKZ2vja@xcTk-Kp5yKOjW36GqL0gioP17pkm4sZfoB6zuVZ",
  "scopes": "read_institutions,write_links,read_links"
}'
```

- What's the difference between a link created with access_mode = single vs access_mode = recurrent?
  - With a single link Belvo will access an account, owners, transactions one single time, but when the recurrent mode is set is possible to set a refresh interval to retrieve the needed data.

```
function openBelvoWidget(accessToken) {
  belvoSDK
    .createWidget(accessToken, {
      callback: (link, institution) => console.log(institution, link),
      access_mode: 'single',
      acess_mode: 'recurrent'
      country_codes: ['BR'],
      institution_types: ['retail'],
      locale: 'pt'
```

- How do you make sure your end application can open Belvo's widget?
  - By doing all tests in the developer environment before going live in production and covering possible errors on the "widget errors and troubleshooting" doc section.
- How can Belvo access information that is 5 months old for an institution like Banamex? Attached to the email, you should find a CSV file. The file includes logs from a customer,

he told us in some cases they can't check financial data from some final users, why is this happening?

- ○ We can use Postman to search for information by date.

```
{
    "date_from": "2021-06-24",
    "date_to": "2021-06-24",
    "link": "{{linkId}}"
}
```

- ○ In the attachment Is possible to see several 400 responses in those logs that may be related to the link or log in credential, and some extra information may be needed to proceed with a deeper investigation.
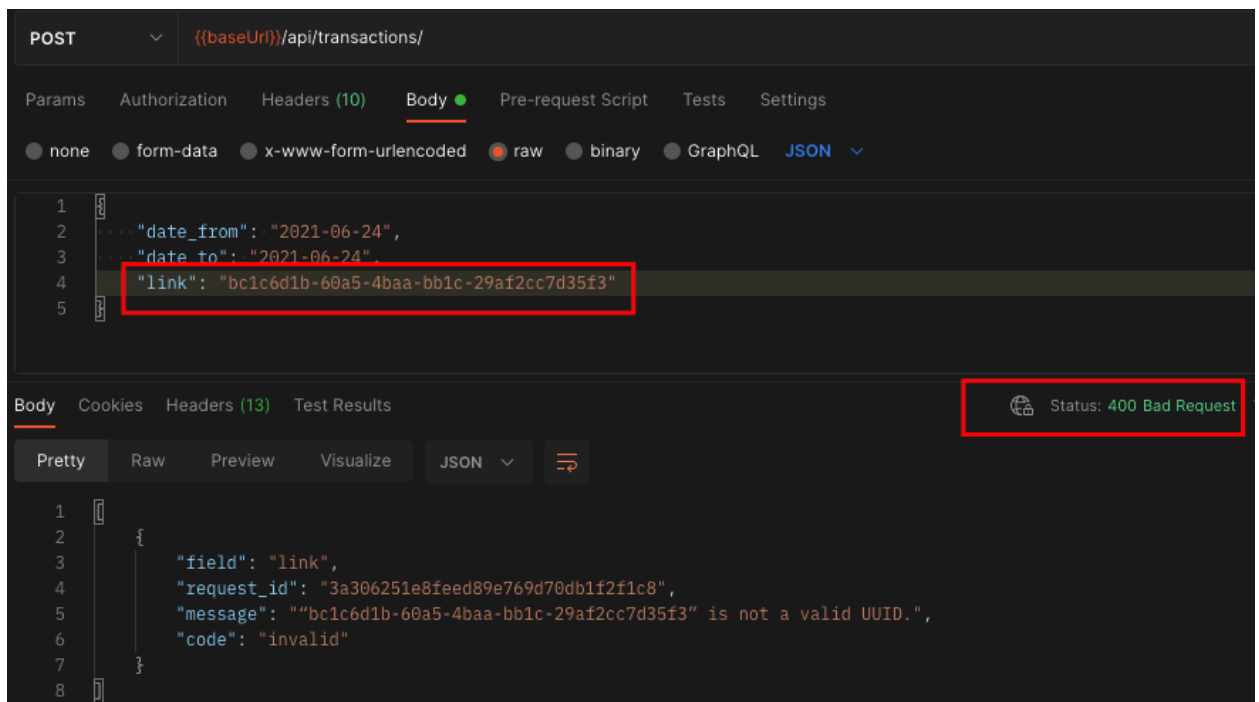
Final Considerations

I could see clear and easily readable documentation about the API and how to integrate it as well and lots of snippets that help me to have a good understanding and walk through the initial configuration.
About the point of improvement, I would like to support the creation of a portal where merchants can search for the information in a friendly user view about their users.