



DOCUMENTATION

Getting Started

SECURITY

Security

DEVELOPMENT

App

OAuth

Connect Bank

Initiate Payment

Batch Payments

App Templates

Sandbox

Bank Feed

SETTINGS

Consent Control

SMTP

Team

Webhooks

Signatures

API Reference

Support Center

Dashboard

Bank Feed

Set up an ongoing bank feed authorized by your customers with Finexer.

When you need access to customers' bank transactions on a daily basis, you can set up an ongoing bank feed with Finexer and pull new transactions regularly with an active consent.

How to create a bank consent and make a connection with one of the support banks, please visit [Connect bank](#) documentation page.

Use case

A customer would like to connect their bank and have all their transactions imported into your software. They click a button in your software that generates a new consent object. You direct the customer

to the consent page. The customer authorizes the request and is taken back to your software. You call Finexer API to retrieve customer bank accounts and transactions.

Sync bank account

In order to receive fresh bank transactions you need to:

1. Utilize our API **Bank Account Sync**. You should set up a scheduler on your end and call this method periodically, e.g. 3 AM daily. Finexer will pull recent data from a connected bank and keep it in a temporary storage for you. To check when the sync procedure has finished you can use **Get sync metadata** endpoint and check the `status` of the sync.
2. Make a call to Finexer API **List transactions** method to retrieve latest transactions into your software.
Note, we return the header `fx-sync` with

value `on` in the response if the specified bank account is being synchronized at the moment.

Track consent expiration

Every consent has its authorization expiration date which can be a maximum of 90 days, unless specifically stated for each financial institution we support. In order to have an uninterrupted service and frictionless user experience, you can set up an automated reminder system “**Consent control**”.

It enables you to set up reminders to be automatically sent to you via webhooks n days ahead of the time when the bank feed is due for re-authorisation. In order to set up an automated reminders, please:

1. Visit **consent control** page in your account settings and enable the service.
2. Configure up to three

reminders based on a set number of days from the consent expiration date.

3. Select the "webhook" method to receive payloads to your webhook endpoint. Note your webhook must be subscribed to

```
reminder.consent_expiration.sent
```

event.

We are here to help

Need help getting started or ready to test your configuration? Contact our team at the [Support Center](#) or at [contact us](#) page. You can also email us at support@finexer.com