



Vendor:

Website Link: <https://developer.yodlee.com/>

API Description:

Envestnet | Yodlee API ("Yodlee API") is a flexible RESTful API that allows developers to access personal financial data from the Envestnet | Yodlee financial data platform that can be used to develop various financial management applications. Yodlee API 1.1 is designed to work with FastLink 3.0.

Yodlee's core API support the entire lifecycle of building a financial data application, from searching for financial institutions, to adding/updating accounts, aggregating/retrieving data and receiving data change notifications. Yodlee's core API supports 90% of the top volume sites in the United States, United Kingdom, Australia, and India.

Envestnet | Yodlee API 1.1 is built on the concept of datasets (see [working with datasets](#)). A dataset is a related set of data attributes. One or more datasets (or selected attributes) may be retrieved in order to support a particular use case. For example, a customer with a Credit Lending product may want to offer credit after determining a user's financial health (e.g. balances and recent transactions) and verifying the ownership of the user's accounts. Retrieving data attributes such as latest account balance, transaction and holdings can help in validating the user's financial health, while the full account number, full account holder name(s), bank transfer code, etc., can help in successfully verifying ownership of the consumer's account. These attributes can be obtained by retrieving the Basic Aggregation Data and Account Profile Datasets.

Important Information:

Are you new to Yodlee APIs? The Yodlee platform retrieves a user's linked financial accounts to provide their overall financial picture. This guide shows you how to link an account and make API calls, without writing any code!

Our developers have written code behind-the-scenes so you can easily make various API calls and see the responses here.



Prerequisite: Make sure you have [registered for a free developer](#) account. Log in to your developer account to try this.

Yodlee supports three developer environments – sandbox, development, and production – each with increasing levels of function and responsibility. What follows only works in the Yodlee Sandbox environment.

There are just three steps to complete this code-free demonstration.

First, you will link to one of your financial accounts, allowing the Yodlee platform to work with your data. You can also use our limited simulated data if you prefer. Second, we will generate two JSON web tokens (JWT). One JWT authenticates you, the third party software developer. This is called the *application* or *cobrand* token. The second JWT, the *user* token, authenticates access to your client data (the end user).

Finally, we will make a couple of API calls to the Yodlee platform, direct from a webpage. Keep these instructions in one browser tab, and open a second browser page to do the work.

1. Launch FastLink and Link an Account

In your working browser page, log in to your developer account, then go to your [API Dashboard](#). We have made it quick and easy to try FastLink. FastLink connects one of your financial accounts to the Yodlee platform. This connection is easy to remove when you are finished. Click **View Test Users** and highlight the **second** Test User, then click **Launch FastLink**.



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