Setting up and using Postman

Contents

Introduction

The API supports two flows:

1. **Authorization code flow** (standard OAuth2 specification)
2. **Client credentials flow** (custom implementation for server-to-server authentication)

Download the Postman collection here

Getting access to our API

Currently, there is no automated process to gain access to the FinCalc API.

To get access, please email support@fincalc.co.uk and provide the following information:

- Your name
- Company name
- Authentication type you require (see above)
- Redirect URLs needed (if using authorization code flow) (For example https://myapp.com/auth/callback)

Scopes available

Scopes are used to specify the level of access your application is requesting. When a user authorizes your app, they consent to the requested scopes.

Scope	Description
client-information	Allows access to client information.
client-financials	Grants access to view household financial data.
fact-find	Enables access to retrieve fact-find data related to a client.

Import and setup variables

1. Start by importing the 'FinCalc API' collection into Postman.
2. Configure the collection variables:
    - Open the 'Collections' tab in the sidebar.
    - Select the imported collection named 'FinCalc API'.
    - Ensure the following variables are set in the 'Current value' column:
        - 'environment_url': Verify this matches the API version associated with the provided credentials.
        - 'client_id': Enter the appropriate client ID.
        - 'client_secret': Enter the corresponding client secret.
    - Scopes: These will be pre-filled with default values. Adjust them if necessary.
    - For the client credentials flow, include the email address of the user being authorized when requesting an access token. This step is not needed for the authorization code flow.
    - Save the updated settings.

Setup the authorization settings

1. **Open the authorization settings**
    - Select the ‘FinCalc API’ collection in Postman and navigate to the ‘Authorization’ tab.
2. **Configure the authorization settings. Set the following fields as specified:**
    - Auth Type: Set to ‘OAuth 2.0’.
    - Add auth data: Set to ‘Request Headers’.
    - Header Prefix: Set to ‘Bearer’.
    - Client ID: Enter ‘{{client_id}}’.
    - Client Secret: Enter ‘{{client_secret}}’.
    - Scope: Enter ‘{{scopes}}’.
    - Client Authentication: Select ‘Send client credentials in body’.
3. **Specify additional settings based on the authorization flow.**

Client credentials flow

- Access Token URL: Set to ‘{{environment_url}}/api/oauth/token’.
- Under the Advanced section, add the following in the Token Request:
    - Key: Set to ‘email_address’.
    - Value: Enter ‘{{email_address}}’.
    - Ensure Send In is set to ‘Request Body’.

Authorization code flow

- Access Token URL: Set to ‘{{environment_url}}/oauth/token’.
- Check the box for ‘Authorize using browser’.
- Under the Advanced section, set the ‘Refresh Token URL’ to ‘{{environment_url}}/oauth/token’.

Obtain an access token

To initiate the token request, navigate to the "Authorization" tab in Postman and click the ‘Get New Access Token’ button.

Client credentials flow

- After initiating the request, Postman should display a status message: Authentication complete. Either wait for 5 seconds or click the ‘Proceed’ button to continue.
- The ‘MANAGE ACCESS TOKENS’ modal will open, displaying the authentication server's response. Since this implementation of client credentials returns a custom format that Postman cannot directly interpret, you’ll need to extract the ‘access_token’ manually.
- Locate the ‘access_token’ key in the response, copy its value, and close the modal.
- Paste the copied ‘access_token’ value into the ‘Token’ field within the ‘Authorization’ tab.

Authorization code flow

- The FinCalc login screen will appear. Enter your FinCalc credentials to log in.
- Once logged in, Postman will redirect back and open the MANAGE ACCESS TOKENS modal with the authentication server's response.
- Click the Use Token button to apply the token and close the modal.
- The Token field in the "Authorization" tab should now be populated automatically.

- (Optional) To ensure the connection to FinCalc remains active, toggle on the Auto-refresh Token switch under the "Authorization" tab.

Using the obtained access token to call endpoints

Once the access token is obtained, you can use it to call the endpoints in the FinCalc API collection. The authentication for the endpoints is configured to work automatically because the ‘Auth Type’ is set to ‘Inherit auth from parent’.

1. **Verify authorization settings**
    - Ensure the collection's ‘Authorization’ tab has the correct access token configured as per the earlier steps.
    - When you call an endpoint in the collection, the token will automatically be applied to the request headers.
2. **Select an endpoint**
    - Navigate to the desired endpoint in the ‘FinCalc API’ collection.
    - Review any parameters, headers, or body data specific to the endpoint.
3. **Send the request**
    - Click the Send button to execute the request.
    - Postman will automatically include the access token in the headers of the request.
4. **Review the response**
    - Check the response body, headers, and status code to ensure the request was successful.
    - If the token has expired or is invalid, you may need to generate a new one following the earlier steps.
5. **Automatic token handling (optional)**
    - If ‘Auto-refresh Token’ is enabled in the collection settings, Postman will handle token expiration and renewal automatically when needed.

Document revision

Version	Date	Amendment	Author
1.0	18/12/2024	Initial release	DG