October 2025

BeSmartee Admin Guide

Integration Documentation

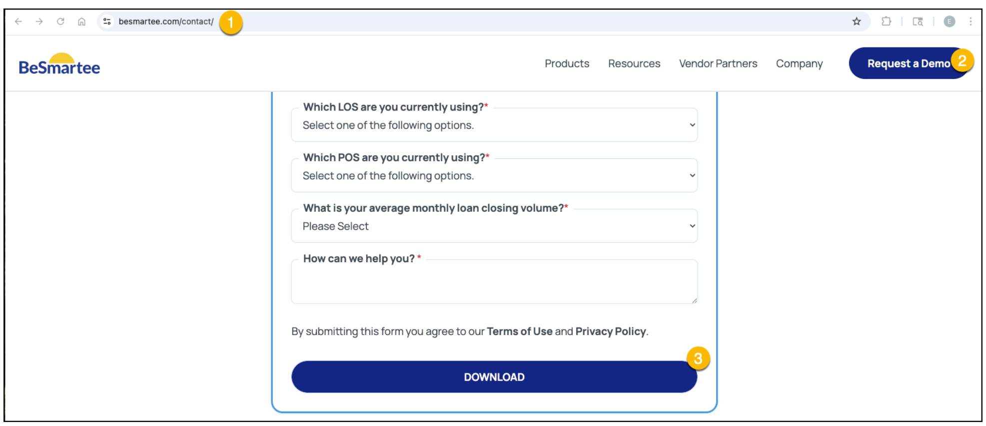
Admin Setup

The BeSmartee configuration is specifically to grant users permission to access the Finicity integration. To complete this process please follow the following steps:

01. Navigate to www.besmartee.com

02. Select '**Request a Demo**' at the upper right-hand corner of the screen

03. The next screen will have a '**Contact Us**' form that will need to be filled out and submitted by selecting '**Download**'



04. Once your request has been processed, a BeSmartee Sales Team member will reach out and assist the admin with setting up an initial meeting. In this initial process, the admin will be assigned a dedicated BeSmartee Implementation Team to set up the integration.

05. Once BeSmartee has completed the set up, you will be directed to Mastercard to start the onboarding process. Prior to the Finicity Welcome Call, you will receive a **Welcome Email**. The Welcome Email will detail the action items the client must complete prior to the Welcome Call. One of those items will be navigating to **Mastercard's Developers (MCD)** site found at: https://developer.mastercard.com/open-banking-us/documentation/onboarding/. The new client should follow the instructions provided and create a project.

06. The same MCD site link above will be used for the new client to request production credentials. The production credentials needed to engage the BeSmartee team are:

PartnerID - Username
Secret - Password
AppKey - API Key

07. Another client task in the Welcome Email is to create a **Mastercard Connect** account: https://www.mastercardconnect.com/. The Welcome Email will also contain the needed company ID. Once the account is created, the client will need to request experience IDs for the desired products.

Experience IDs - These are Finicity configured borrower workflows that determine what the borrower will see during the Mastercard Data Connect experience.

For additional instructions on how to create Experience IDs, navigate to the following link: https://developer.mastercard.com/open-banking-us/documentation/connect/configure-connect-experience/customize-connect/.

08. Once the client has completed the security documentation portion of the Welcome Email, then a **Welcome Call** will be scheduled. On this call, the client will be introduced to the team, review use cases, receive a timeline overview, and review Mastercard Connect including how to **submit a support ticket** as well as review how to customize Mastercard Data Connect. This will be what the borrower will see during the Mastercard Data Connect experience. The client can customize the terms and conditions screen, account selection options, top financial institutions selection, and finally the success screen.

09. Once the client has the production credentials, they should contact their BeSmartee CSM. Their BeSmartee CSM will work with the admin to enter the production credentials the client received and test the integration.

Testing will be in production using production credentials. Testing profiles can be found here: https://developer.mastercard.com/open-banking-us/documentation/test-the-apis/

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