



Investnet | Yodlee My Yodlee January 2021 Release Notes

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1 Introduction

The My Yodlee release notes introduces you to the new features or the enhancements made in January 2021. The following are the new features/enhancements:

2 Service Requests

On the **Service request** details page the following enhancements have been done:

- **Status** – The existing **Status** field has been enhanced to display the service request (SR) status. For example, Open, Pending, Resolved, or Closed.
- **Assigned to** – The **Assigned to** field is newly introduced that displays to whom the SR is assigned. For example, to you (your organization) or to Yodlee.
- **Internal note** –The existing internal note functionality has been enhanced to a toggle switch. Users can add private comments in the **Internal note** box that are only visible to their respective organization by using the toggle option.
- **Send back to Yodlee/Add comment drop down** – Enhancements have been introduced in the way a service request is updated and moved between your organization and Yodlee.

To make updates to a service request without changing the status and moving it to Yodlee, the status comments can be added to the description field in the worklog of the service request. Selecting **Add Comment** will add the inputs to the service request without changing the status.

Note: By default, comments are visible to both your organization and Yodlee. Use the **Internal note** toggle to add internal-only comments to a service request that cannot be seen by Yodlee.

To change the status of a service request, choose the desired action from the drop-down menu. For example, if a service request is assigned to your organization and you want to reassign the ticket back to Yodlee, select **Send back to Yodlee** from the drop-down menu to move the ticket back to Yodlee's queue.

Note: The list of available actions in the drop-down menu will change dynamically based on the current status of the ticket.

The available options are:

- Add comment – No status change
- Send Back to Yodlee – Reassign the ticket to Yodlee
- Mark as Resolved
- Close Service Request

3 Service Request History

The **Service request** button with a yellow indicator is a new feature on the **Customer Details** page.

The **Service request** button allows a user to quickly view service request information for a specific user. The yellow indicator on the **Service request** button displays the number of active service requests for a user. Active service requests are service requests that are not closed.

Clicking the **Service requests** button displays a drop-down menu with the following two options:

- **Active** - Selecting **Active** displays all active service requests for a user.
- **All** - Selecting **All** displays all service requests for a user including closed service requests.

4 Search Indicators

The newly introduced **Search Indicators** allows the user to view a search/filter applied to a specific column at the top of the page. If multiple searches/filters have been used, the user can view all the active search/filter indicators.

A specific search/filter indicator can be cleared individually by clicking on the **X** next to the specific search/filter. All search/filter indicators can be cleared simultaneously by clicking **Clear All**.

The screenshot shows a search interface with a table of service requests. At the top, there are search filters: 'Status: Open X' and 'Subject: Service request X', both circled in red. A 'Clear all' button is also circled in red. The table below has columns for Service request, Status, Subject, Issue, Category, Submitted, Last updated, and Priority. The first row shows a service request with ID 10225252, Status 'Open', and Subject 'Service request created for analysis'.

Service request	Status	Subject	Issue	Category	Submitted	Last updated	Priority
10225252	Open	Service request created for analysis	Accounts & Balances	Account Holder Name	Sep 23, 2020 at 2:56 AM	Feb 04 at 2:45 PM	P3
10222864	Open	Service request created for analysis	Link / Add Account or Refr...	Failure	Aug 26, 2020 at 7:51 AM	Feb 05 at 12:25 PM	P3
10222660	Open	Service request created for analysis	Link / Add Account or Refr...	Failure	Aug 26, 2020 at 7:51 AM	Feb 04 at 6:21 PM	P3
10222860	Open	Service request created for analysis	Link / Add Account or Refr...	Failure	Aug 26, 2020 at 7:51 AM	Feb 04 at 6:22 PM	P3
10222056	Open	Service request created for analysis	Link / Add Account or Refr...	Failure	Aug 25, 2020 at 7:38 AM	Feb 04 at 6:22 PM	P3
10210252	Open	Service request created for analysis	Accounts & Balances	Incorrect Balance	Jul 17, 2020 at 8:40 AM	Feb 04 at 6:22 PM	P3

Search Indicator showing search/filter indicators

5 Search Parameters

When a user uses a specific search parameter, the most recently used search parameter will remain sticky until it is changed in the following scenarios:

- Creating a service request
- Performing an Advanced Search
- Searching for a Customer

6 Date Format

For easy sorting and filtering within CSV/Excel file, the date format in the exported CSV/Excel file has been enhanced to render as **MM/DD/YY h:mm**.