Envestnet | Yodlee My Yodlee

User Guide

2021 Q1

Envestnet | Yodlee Confidential

INNOVATION APPLIED™

© 2021 Envestnet | Yodlee® All rights reserved. Technology protected by one or more U.S. Patents or Patents Pending. Use subject to license terms. May include materials developed by third parties. Yodlee and the Yodlee Logo are trademarks or registered trademarks of Envestnet | Yodlee in the U.S. and other countries. All other trademarks mentioned in this document or Website are the property of their respective owners.

Contents

Chapter 1: About This Document

1.1 What This Document Discusses

The Envestnet | Yodlee® My Yodlee User Guide provides detailed instructions on how to perform day-to-day operational tasks associated with the Envestnet | Yodlee My Yodlee application and managing the workflows performed by customers. Using the My Yodlee application, users can file service requests, review customer details, review analytical reports, etc. My Yodlee is a web-based application for reporting, prioritizing, escalating, and resolving service requests raised by customers who use other My Yodlee solutions.

The My Yodlee application is used by a customer's support team to raise service requests. The My Yodlee application is used by the Envestnet | Yodlee Client Services team (hereafter refered to as Yodlee Client Services team or Client Services team) to perform advanced operations like updating service requests, accessing Yodlee Financial Wellness Solution utilities, and using other tools to debug issues and perform administrative tasks when the service request is escalated by a customer's support team to Yodlee.

1.2 Who Should Read This Document

Audience	Description	Of Interest?
Sponsor	The sponsor is the person who controls the purse strings and gives final approval to purchase the Yodlee product. The executive may also be the person who will manage the product at a high-level.	Yes. The document includes detailed instructions for performing day-to-day operational tasks associated with the My Yodlee application.
Product Functional Lead	The product manager is the person in closest contact with the Yodlee account manager (TAM). This person is typically responsible for approving the features/functions delivered to your consumers.	Yes. The document explains how the application can be used when it is up and running.
Technical Lead	The technical lead is the person who will implement the Yodlee application and is the primary point of contact with the Yodlee technical team. The technical lead will be involved in the behind-the-scenes integration work between the customer and Yodlee.	Not really. It presents information that's nice to know but isn't technical.
Support	Support people keep consumers happy and work most closely with the Yodlee Client Services team to resolve issues and file bugs on their behalf.	Yes. The support team must have the detailed instruction for performing day-to-day operational tasks associated with the My Yodlee application.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

1.3 Other Documents of Interest

For more information about My Yodlee, refer to the following documents:

- *Envestnet | Yodlee CustomerCare FAQ* – The Yodlee CustomerCare FAQ provides answers to questions that are frequently asked by customers and customer support teams.
- *Envestnet | Yodlee CustomerCare Alerts Guide* – The Yodlee CustomerCare Alerts Guide provides information regarding Yodlee alerts. It contains an overview of the Yodlee Alert Engine and provides detailed list of alerts associated with Yodlee CustomerCare.
- *Envestnet | Yodlee CustomerCare Product Description* – The Yodlee CustomerCare Product Description provides a detailed description of the Yodlee CustomerCare application. It includes information, descriptions, and details on each of the major components in the Yodlee CustomerCare application.
- *Envestnet | Yodlee CustomerCare Standard Reports* – The Yodlee CustomerCare Standard Reports Guide describes the standard reports available with Yodlee CustomerCare. The information provided in the reports can be used by the Yodlee customers for various purposes such as market planning, assessing customer satisfaction, improving services, or conceptualizing new products/services.
- *Envestnet | Yodlee SAML Implementation Guide* – The Yodlee SAML Implementation Guide describes how customers can configure and implement a SAML SSO solution with Yodlee applications.

1.4 After Reading This Document

Envestnet | Yodlee® welcomes your comments and suggestions on the quality and usefulness of this document. Please feel free to share your input with the documentation team by sending an email to *TechPub@yodlee.com*.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 2: Getting Started

2.1 Introduction

My Yodlee enables customers using Yodlee products, including Envestnet | Yodlee Financial Wellness Solutions, Envestnet | Yodlee Account Aggregation Service (hereafter referred to as Aggregation), Envestnet | Yodlee Instant Account Verification (hereafter referred to as Verification), and/or Envestnet | Yodlee Account to Account Funds Transfer to deliver multitier customer service. My Yodlee also provides various engagement and analytical reports to enable support personnel, business leaders, and other users of the application to make data driven decisions.

My Yodlee uses customer relationship management (CRM) processes to research and resolve issues. Additionally, the application offers an on behalf of feature that enables Yodlee Client Services (YCS)/Yodlee Service Representatives (YSR) and Customer Service Representatives (CSR) to perform certain activities on behalf of the customer. Activities that can be performed on behalf of the customer are given below:

Yodlee Financial Wellness Solutions

- Manage sites and accounts
- View categorization rules

Features and functionality available in My Yodlee are controlled through a role-based permission system. Permissions are defined for a particular role and My Yodlee users are assigned to a role.

2.2 Logging In

Every customer service representative (CSR) is assigned an appropriate User ID and password that will be used to authenticate them as a legitimate Yodlee user.

Using the URL Supplied by Yodlee, a user can log in to My Yodlee by using a valid user ID and password combination. This section provides information about logging in to My Yodlee.

To log in to My Yodlee

1. Open a new browser window and navigate to the **My Yodlee** URL.

   The **My Yodlee** URL is provided to your organization as part of the registration process. The **Login** page is displayed on successful navigation to the **My Yodlee** URL.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

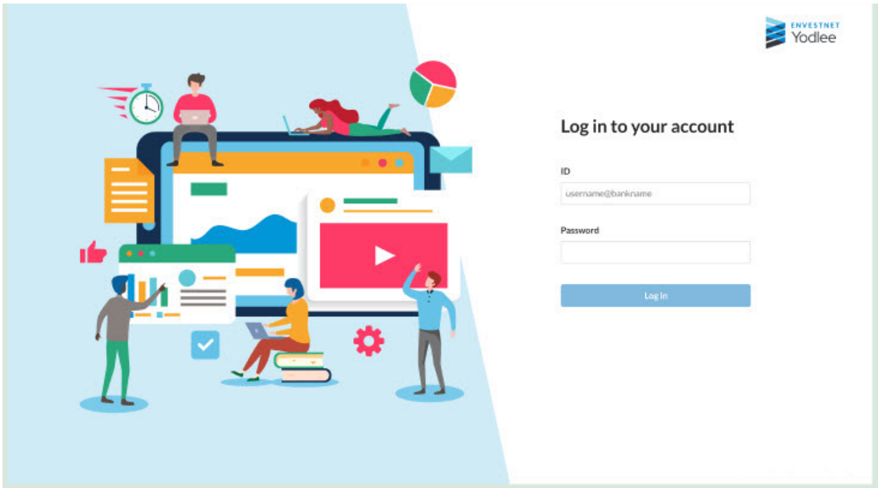


Fig. 2-1: The login page

2. Enter the **ID** and **Password** in the relevant fields.

   The Administrator for My Yodlee within your organization will provide the ID and temporary password to log in to My Yodlee. After logging in for the first time, the user will be prompted to change the temporary password. If the user forgets the password, the administrator can reset the password and provide a new temporary password.

3. Click **Log in.**

   The **Dashboard** is displayed.

NOTE: While **My Yodlee** is supported across many browser versions, using an old browser version may result in a degraded experience that includes seeing the original **Yodlee CustomerCare login** page. Additionally, My Yodlee may not be supported on some legacy browser versions due to security concerns or other issues. If a user tries to access My Yodlee using a legacy browser version, the user will experience the following:

- A screen will appear indicating the current browser version is a legacy version
- The experience may be degraded but can continue to log in
- A message saying the browser needs to be updated in order to access My Yodlee.

2.3 In-Product Guidance

After the first successful log in attempt, the **In-Product Guidance** carousel will appear. This carousel provides the guidance on where to find the features and the functionality in the My Yodlee experience. The **In-Product Guidance** carousel can be replayed at any point in time using the **Replay Features** option in the menu.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Fig. 2-2: Replay features on the Menu

The following are notifications that will be shown as part of the **In-Product Guidance** carousel.

2.3.1 Welcome Notification

For first time users, the **Welcome** notification is displayed.

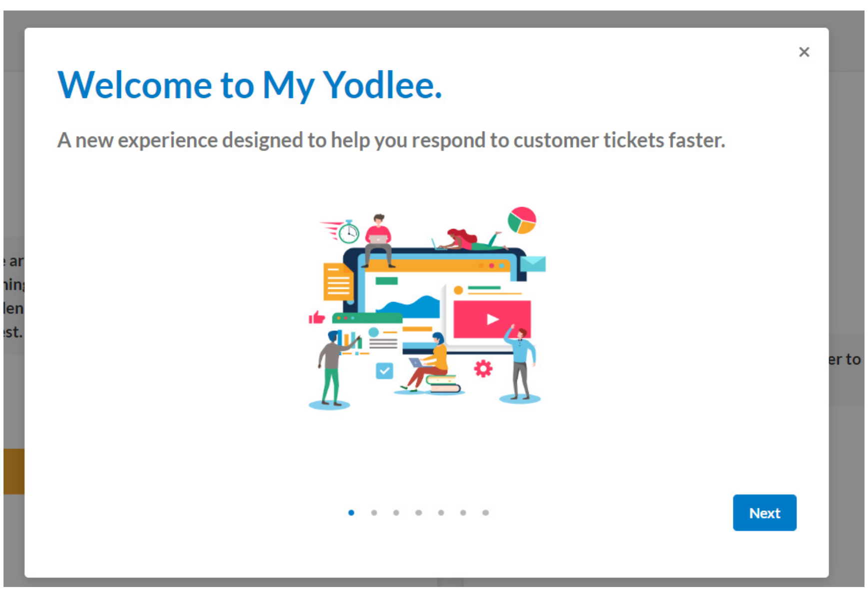


Fig. 2-3: Welcome notification

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

2.3.2 Dashboard Notification

The **Dashboard** provides condensed views of different pages found throughout the **My Yodlee** application. Each user can customize their **Dashboard** to best suit their needs and workflows.

For more information about the **Dashboard** page, see *Introduction on page 3-1*

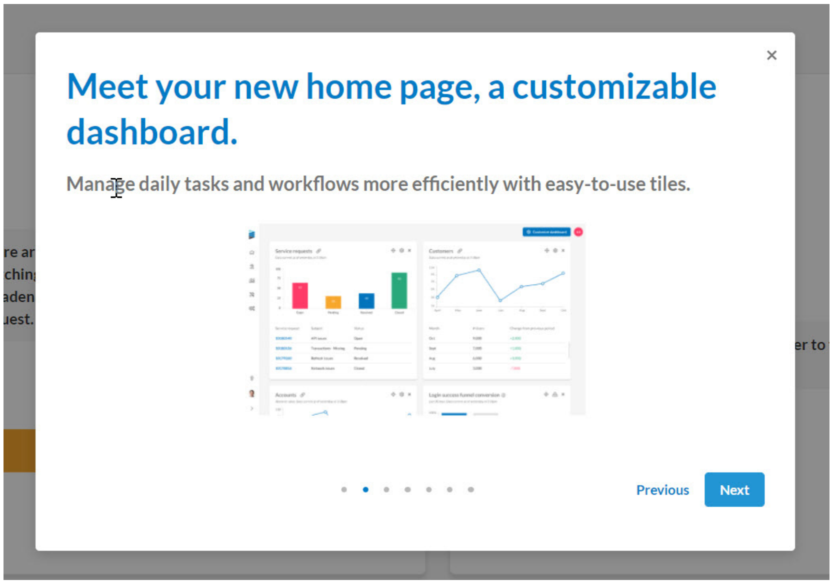


Fig. 2-4: Dashboard notification

2.3.3 Service Requests Notification

The Service Requests notification represents one of the key pages found in **My Yodlee**. This is where a user can create and manage service requests, including leveraging the automated analysis tool.

For more information about the **Service Request** page, see *Service Request on page 4-1*

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

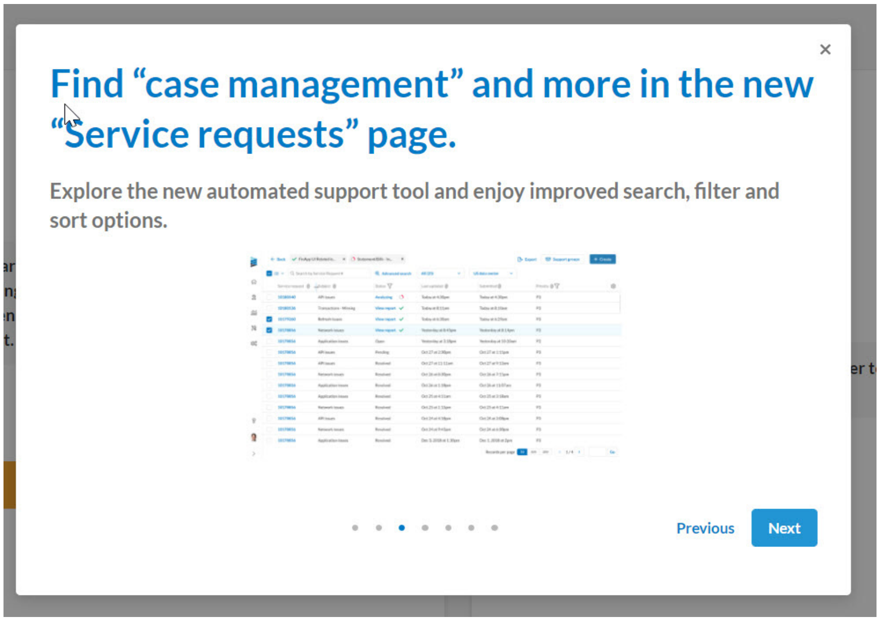


Fig. 2-5: Service request notification

2.3.4 Customers Notification

The **Customers** notification provides information about end-customers and their related accounts.

For more information about the **Customers** page, see *Customers on page 4-22*

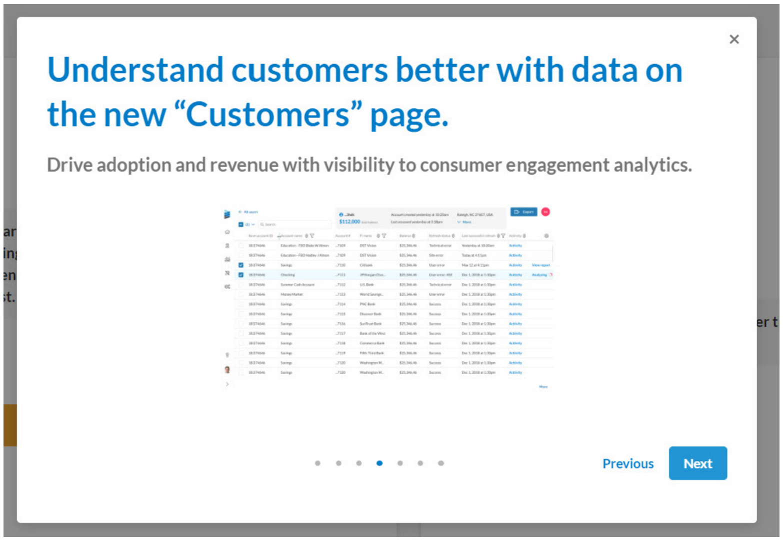


Fig. 2-6: Customers notification

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

2.3.5 Sites Notification

The **Sites** page provides updated information about the sites used as part of the Aggregation and/or Verification product offerings. This page contains alerts and information about these sites, including various usage metrics specific to the organization's customers.

For more information about the **Sites** page, see *Sites on page 4-17*

NOTE: The **Service Insights** Dashboard is accessible through the **Classic** menu option. All other Site information is found on this page.

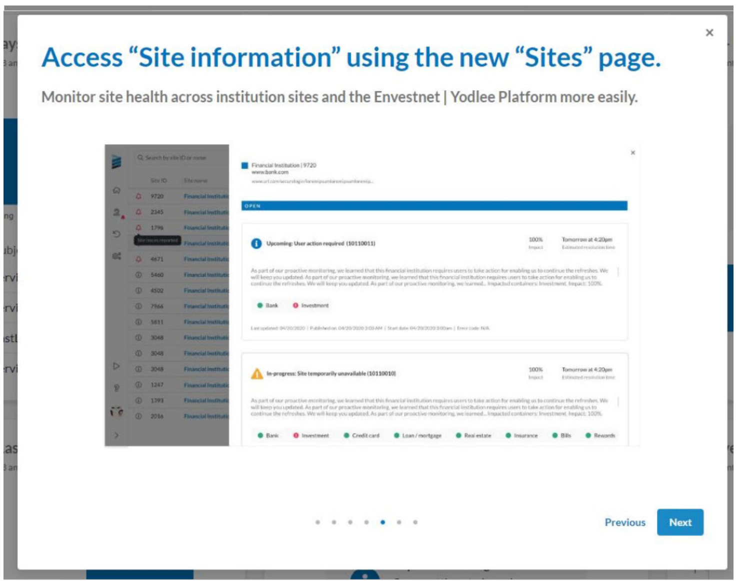


Fig. 2-7: Sites notification

2.3.6 Status Notification

The **Status** page allows the users to view what is happening on the Yodlee platform with respect to **Maintenances** (planned and ongoing) and **Incidents** (ongoing). For more information about the **Status** page, see *Status on page 4-29*

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

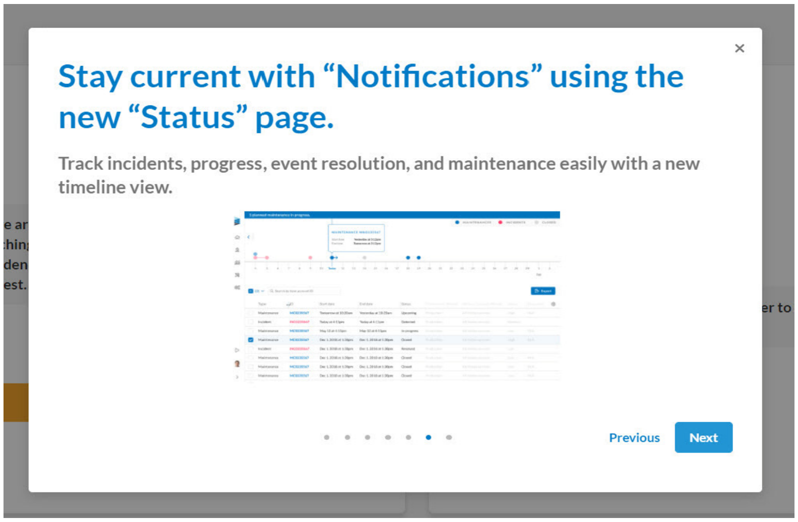


Fig. 2-8: Status notification

2.3.7 Classic Notification

The **Classic** option found in the left navigation menu provides access to additional functionality previously available through the **Yodlee CustomerCare** tool. Clicking the **Classic** menu option, a new tab will open with access to these pages. Access to features and functionality in the **Classic** experience is based on permissions.

For more information about this functionality, see *Introduction on page 5-1*

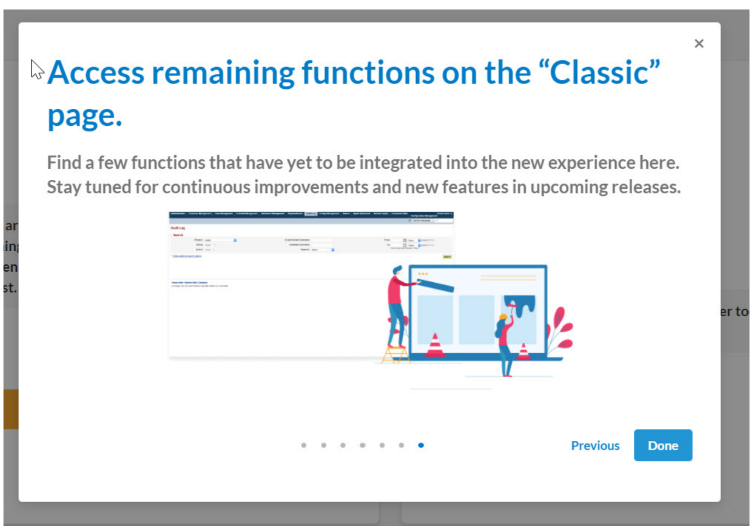


Fig. 2-9: Classic notification

2.4 Menu

The **Menu** contains links to the following pages:

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

- Dashboard
- Support
- Classic
- Settings
- Questions
- Replay (In-Product Guidance)
- My Account

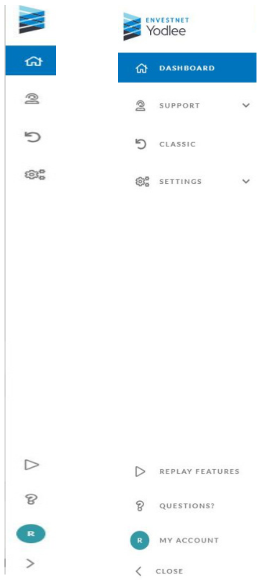


Fig. 2-10: Closed and Open Menu bar

2.5 Questions

Clicking **Questions** will open the **Help** page in a new browser window. This page contains helpful resources related to **My Yodlee** that includes FAQ's, video tutorials, and the user guide.

2.6 Signing Out

To sign out of **My Yodlee**, navigate to the **My Account** page and click **Sign out**.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 3: Dashboard

3.1 Introduction

The **Dashboard** serves as the landing page (home page) for all users. The **Dashboard** provides a condensed view of information found on the **Service Requests** page and the **Customers** page.

3.2 First-Time User Experience

For the first time users, the **In-Product Guidance** provides information about features of My Yodlee application as notifications. For more information about the notifications, see *In-Product Guidance on page 2-2*.

3.3 Dashboard

Each user can customize the **Dashboard** by configuring each tile based on their preferences. Tiles can also be rearranged on the Dashboard based on a user's preferred layout.

NOTE: If the user's organization is using the latest version of Envestnet | Yodlee FastLink (hereafter referred to as FastLink), four additional Engagement reports will be available for view on the **Dashboard**. For more information about the Engagement reports, see *Engagement Reports on page 3-4*

For more information about the **Dashboard**, refer to the Dashboard video found on the **Help** page.

Below is a sample layout of the Dashboard.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

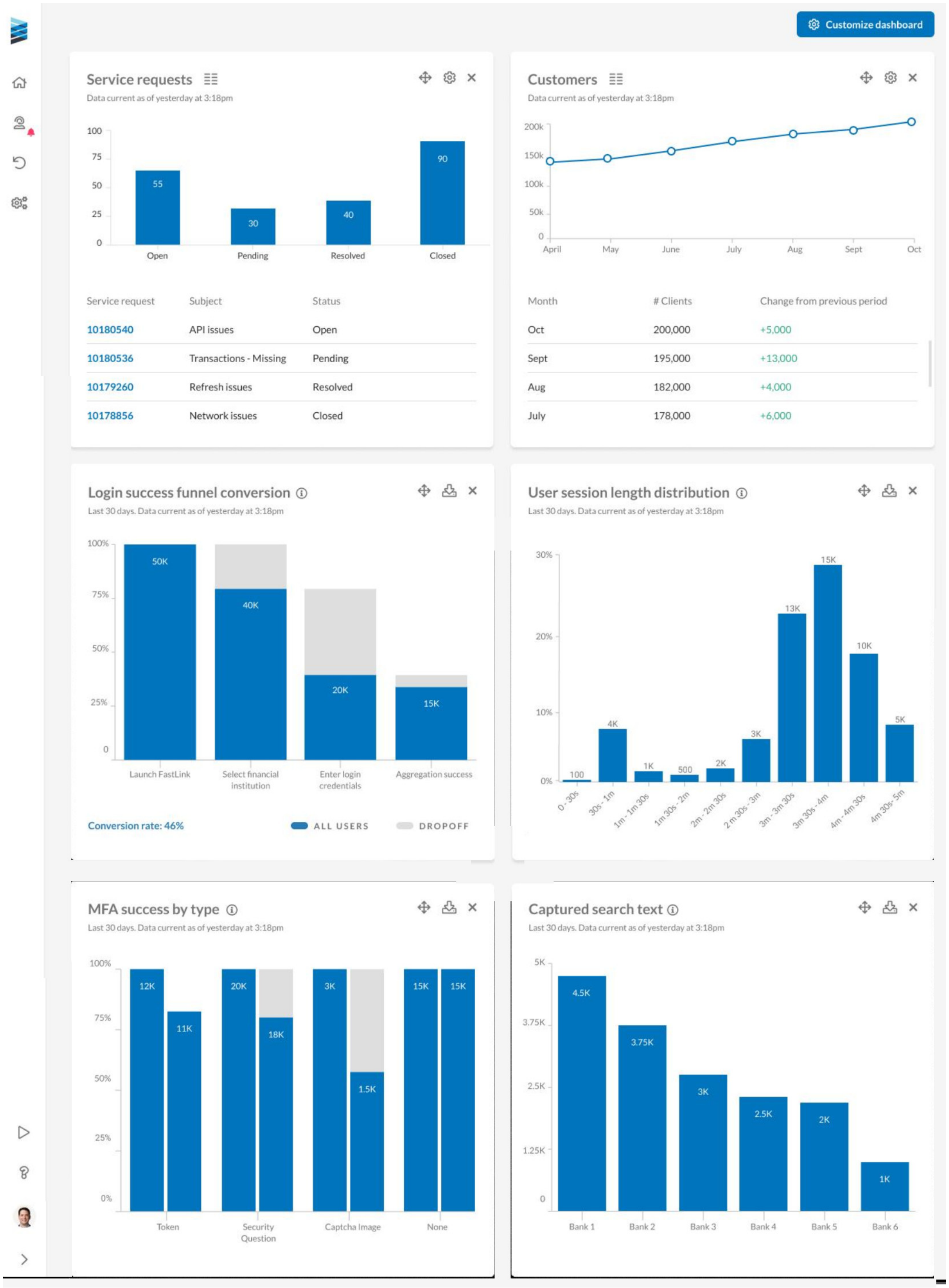


Fig. 3-1: Full view of the Dashboard page

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

3.4 Tiles and Reports on the Dashboard Page

The **Dashboard** page contains the following tiles and reports:

3.4.1 Service Request Tile

The **Service Request** tile provides a detailed view of service requests that match the configuration criteria applied to the tile.

NOTE: A time stamp indicating when the data was last refreshed is displayed under the name of each tile.

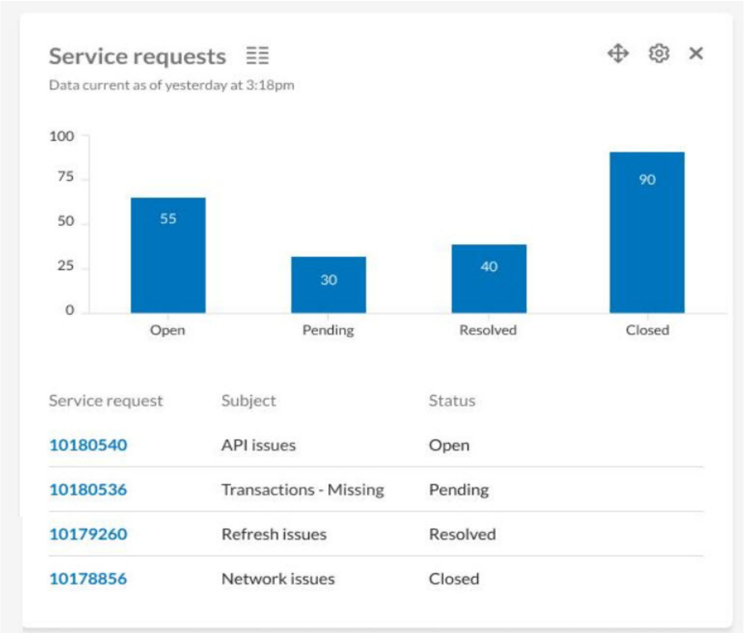


Fig. 3-2: The Service Request Tile

3.4.2 Customers Tile

The **Customers** tile displays the change in active customers from period to period. This tile provides insight into active customer growth trends over time.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

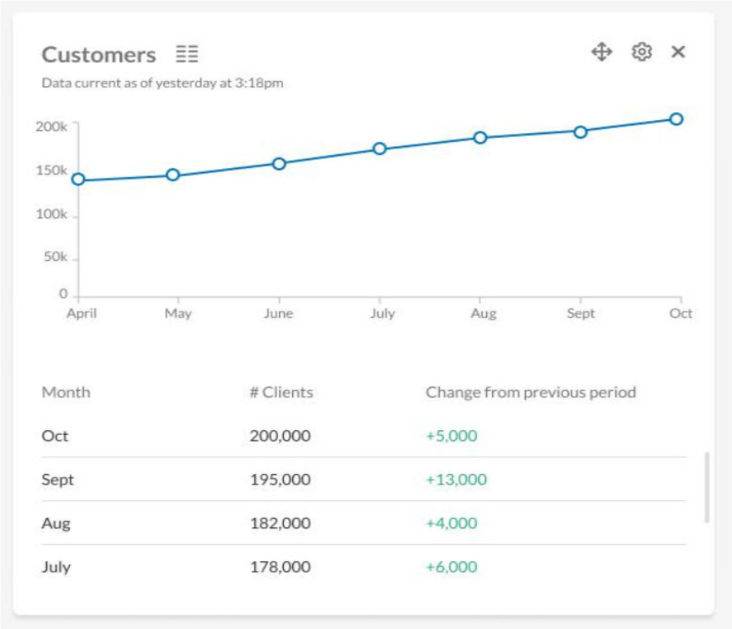


Fig. 3-3: The Customers Tile

3.4.3 Engagement Reports

Engagement reports are available to customers who are enabled for the latest version of FastLink. For more information, refer to the **Help** page - Customer engagement reports video.

3.4.3.1 Login Success Funnel Conversion Report

The **Login Success funnel conversion** report displays the number of customers who perform a series of events throughout the account addition process. Each step measures the number of customers who launch FastLink, reach the login page, enter their credentials, and successfully login. This provides insight as to how and why customers are dropping off through the authentication process.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

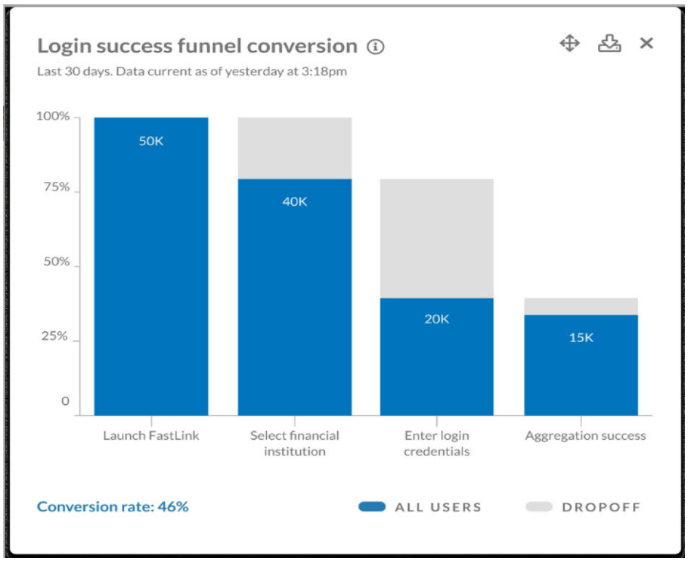


Fig. 3-4: The Login success funnel conversion report

3.4.3.2 Captured Search Text Report

The **Captured search text** event segmentation report shows the top six financial institutions that customers are searching for by typing into the search bar. This provides insight into which institutions customers are searching for and where else they have financial accounts. If there is a financial institution that is searched frequently, customer may want to consider adding it as a button on the popular sites selection page for a better user experience.

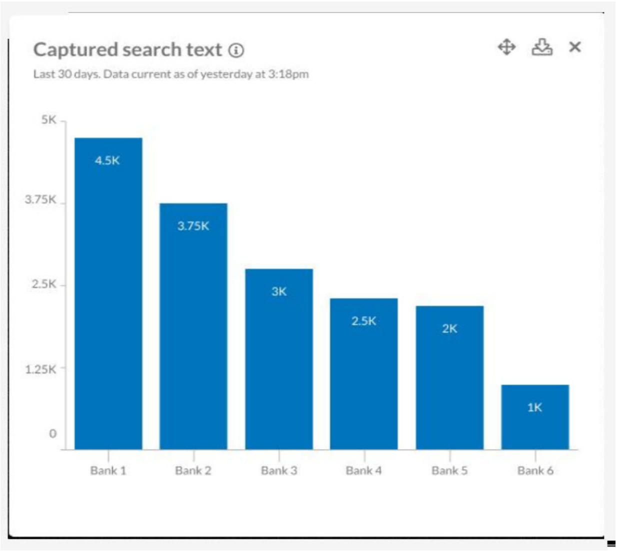


Fig. 3-5: Captured Search Text Report

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

3.4.3.3 MFA Success by Type Report

The **MFA success by type** report displays the success rate of each multifactor authentication (MFA) method. This is a common point where customers get struck through the account addition flow. For each MFA there are two bars, the first bar shows the number of customers those were shown the MFA and the second bar is the number of customers those entered the MFA successfully. This data gives insight into which security type is most effective and easiest for the customers to authenticate.

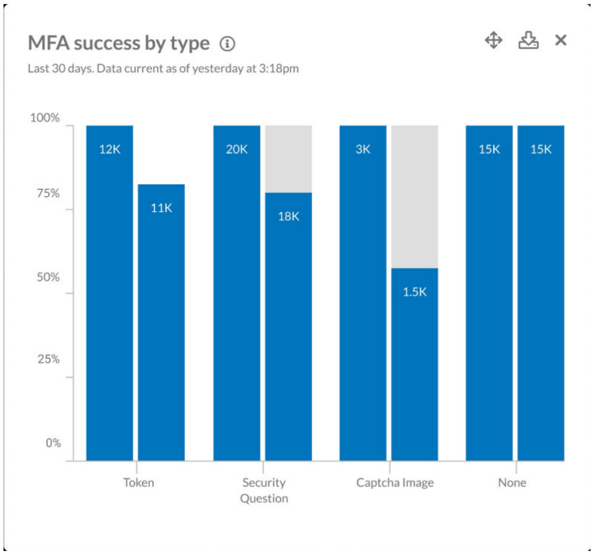


Fig. 3-6: MFA Success by Type Report

3.4.3.4 User Session Length Distribution Report

The **User session length distribution** report shows the distribution of user session lengths in a histogram. Session length is the amount of time a user spends in the FastLink application in a single session. This is a good way to measure engagement.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

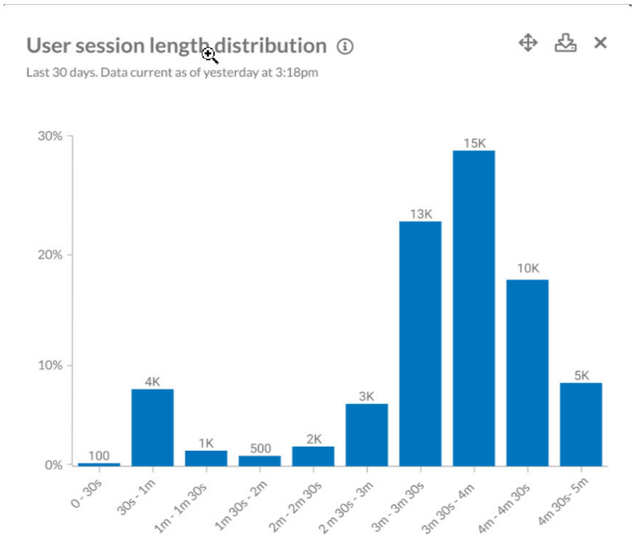


Fig. 3-7: User Session Length Distribution Report

3.5 Core Functionalities and Features of the Dashboard

Some of the basic functionalities available on **Dashboard** are:

- Customize Dashboard (*Customizing the Dashboard on page 3-7*)
- Viewing a Tile (*Viewing Additional Tile Information on page 3-10*)
- Configuring a Tile (*Configuring Tile Settings on page 3-11*)
- Moving Tiles (*Moving a Tile on page 3-15*)
- Deleting a Tile (*Deleting a Tile on page 3-15*)
- Downloading Engagement Reports (*Downloading Tile Information on page 3-16*)
- Link to a page (*Viewing Tile Details on page 3-16*)
- Service Request ID Link (*Dashboard Service Request ID Link on page 3-16*)

3.5.1 Customizing the Dashboard

Clicking **Customize Dashboard** opens the configuration menu. An example of the menu is shown below:

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

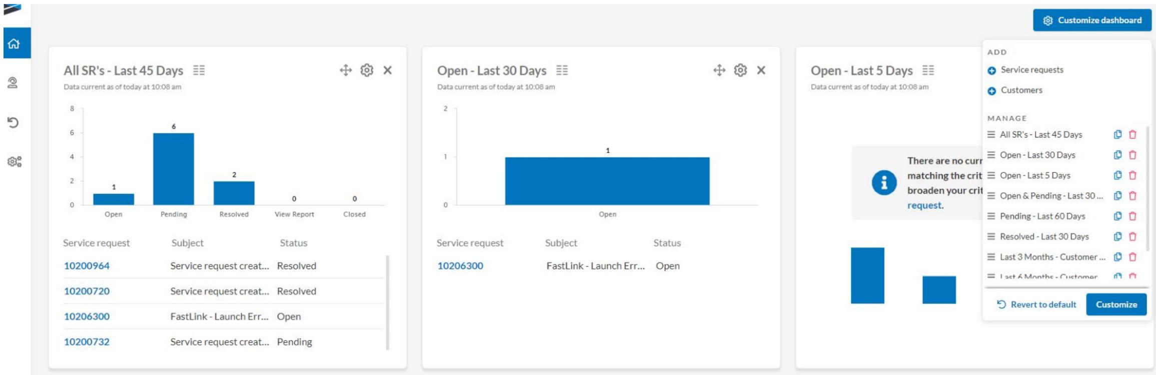


Fig. 3-8: The Customize Dashboard menu

The **Customize Dashboard menu** is where tiles can be added, duplicated, rearranged, or deleted.

The **Customize Dashboard** displays the following tiles and reports to add on the **Dashboard** page:

- **Tiles**
  - Service Requests
  - Customers
- **Engagement Reports**
  - Login Success Funnel Conversion
  - Captured Search Text
  - MFA Success by Type
  - User Session Length Distribution

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

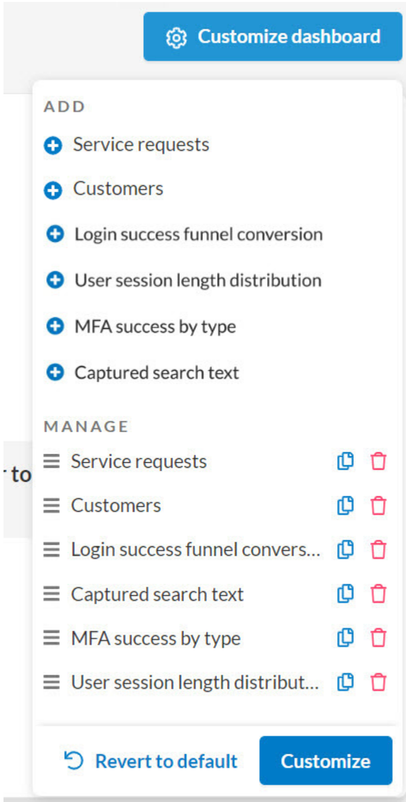


Fig. 3-9: Customize Dashboard menu

3.5.1.1 Adding a Tile to the Dashboard

Clicking a tile under the **Add** section in the **Customize Dashboard** configuration menu starts the process of adding a new tile to the **Dashboard**. Once a new tile is selected, the tile's configuration menu will be displayed, allowing the configuration of the newly created tile. Clicking **Apply Settings** on the tile configuration menu will add this tile to the **Dashboard** and the new tile will be brought into focus.

NOTE: Engagement reports are not available for configuration. These tiles will automatically be added to the Dashboard (no configuration menu presented).

3.5.1.2 Deleting a Tile from the Dashboard

Clicking the **Delete** icon will present a confirmation message before removing the tile from the **Dashboard**. Select **Delete** to remove the tile from the **Dashboard** or select **Cancel** to return to the **Customize Dashboard** menu.

NOTE: Tiles can also be deleted directly from the **Dashboard** by clicking on the **X** icon available on each tile.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

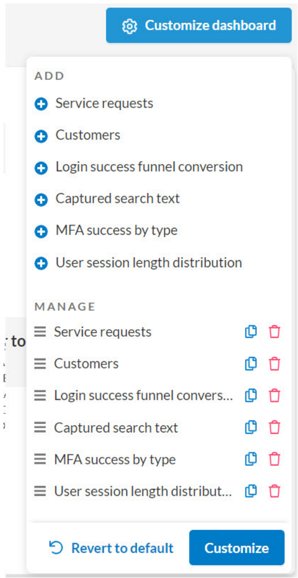


Fig. 3-10: Delete icon

3.5.1.3 Duplicating a Tile

Clicking the **Duplicate** icon, the user can replicate an existing tile on the **Dashboard**. After clicking the **Duplicate** icon, the tile configuration menu with the existing tile's settings will be displayed, allowing for quick editing and creation of a series of tiles.

3.5.1.4 Reverting to Default

By clicking **Revert to Default**, the Dashboard will return to default configuration settings.

3.5.1.5 Saving the Dashboard Layout and Settings

Clicking the **Customize** button saves the current layout and settings applied to the **Dashboard**.

3.5.2 Viewing Additional Tile Information

Hovering over the **Information** icon presents additional information about a particular tile.

NOTE: This feature is not available for all tiles.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

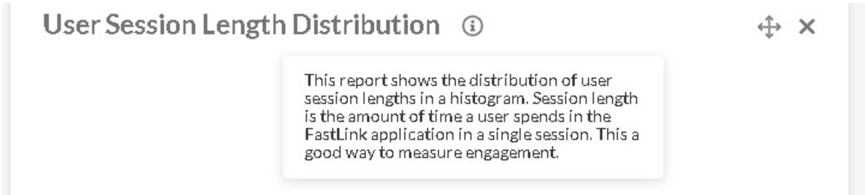


Fig. 3-11: Information icon displaying the tile information

3.5.3 Configuring Tile Settings

Clicking the **Settings** icon opens the configuration menu to change the settings for the selected tile.

3.5.3.1 Configuring the Service Request Tile Settings

Settings on the **Service Request** tile can be customized based on the following criteria:

- Status
- Submitted or Modified Date
- Assignee Status

Additional data points can be displayed, including subject and priority, in the tile. Sorting capabilities and the option to relabel the tile offers the flexibility to see service requests meeting the defined criteria on the **Dashboard**.

To configure the Service Request tile settings

1. Click the **Settings** icon on the **Service Request** tile.

   The **Service Request Settings** configuration menu is displayed.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

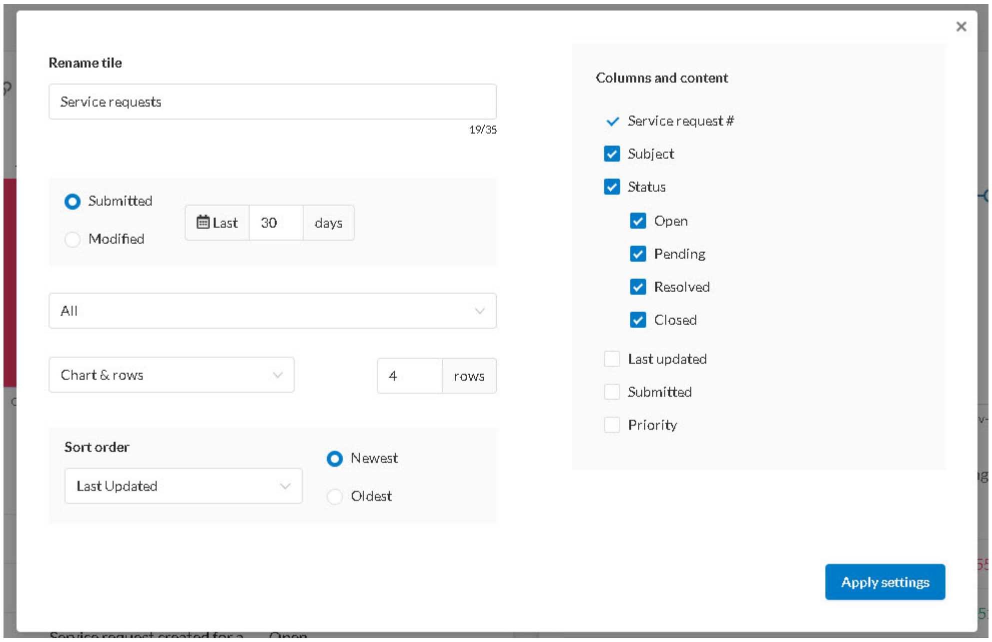


Fig. 3-12: The Service Request configuration menu

Table 3-1: Fields displayed on Service Request configuration menu

Field	Description
Rename tile	Change the name of the tile.
Submitted/Modified	Select submitted or Modified. Select the number of days.
Assignee	Select from the drop-down list. The available options are: • All • Assigned to me • Created by me
Chart and Row selection	Select the options from the drop-down. The available options are: • Chart and Row selection • Chart only • Rows only
Sort Order	Select newest or oldest radio button to view the service request. Sort the service request by selecting from the drop-down list. The available options are: • Service request # • Subject • Status • Last Updated • Submitted • Priority
Column and content	Select the check boxes to display the service request as per the selection.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

2. Click **Apply Settings**.

   The **Service Request** tile is displayed with the configured settings.

3.5.3.2 Configuring the Customers Tile Settings

Settings on the **Customers** tile can be customized based on the following criteria:

- Time Period
- Held or Held-Away Accounts
- "*X*" Day active users

The change in Customers from period to period can be represented numerically or in percentage terms. Sorting capabilities and the option to relabel the tile offers the flexibility to see different customer growth trends on the **Dashboard**.

To configure the Customer Tile Settings

1. Click the **Settings** icon on the **Customers** tile.

   The **Customers Settings** configuration menu is displayed.

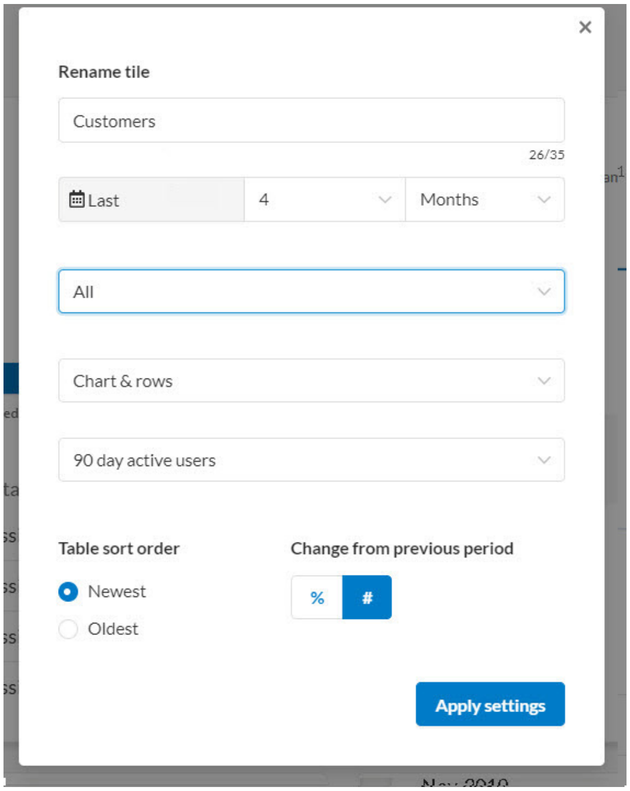


Fig. 3-13: The Customers configuration menu

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 3-2: Fields displayed on Customer configuration menu

Field	Description
Rename tile	Change the name of the tile.
Date selection box	Select years, months, or quarter.
Held and held-away data	The available options are: • All • Withheld accounts • Withheld away accounts
Chart and Row selection	The available options are: • Chart and Row selection • Chart only • Rows only
Active users selection	Select 90 day active users or 30 day active users.
Table sort order	Select newest or oldest.
Change from previous period	Select % or #.

2. Click **Apply Settings**.

   The **Customers** tile is displayed with the configured settings.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

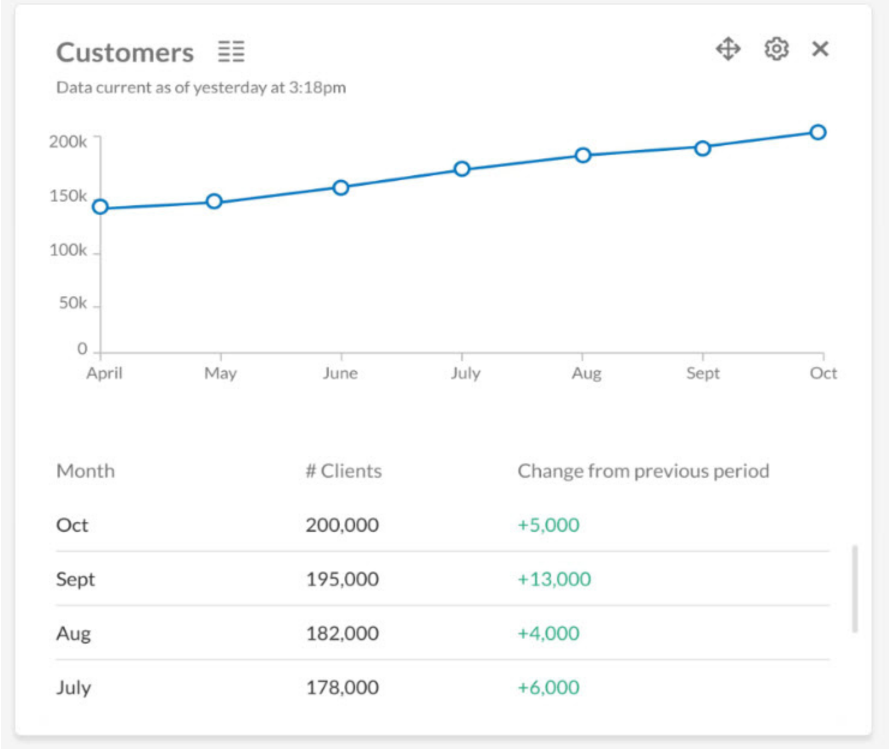


Fig. 3-14: The Customers tile

3.5.4 Moving a Tile

Tiles can be rearranged on the **Dashboard** by clicking on the **Move** icon to drag and drop the tile in a new location.

NOTE: Tiles can also be rearranged on the Customize Dashboard menu. For more information, refer to *Saving the Dashboard Layout and Settings on page 3-10*.

3.5.5 Deleting a Tile

Tiles can be deleted by clicking the **Delete** icon.

The user can also delete a tile by using **Customize Dashboard**, for more information, see *Deleting a Tile from the Dashboard on page 3-9*

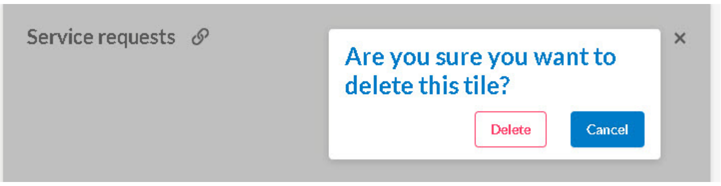


Fig. 3-15: Delete confirmation dialog box

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

3.5.6 Downloading Tile Information

The download functionality is only available for Engagement reports.

Clicking the **Download** icon downloads all four Engagement reports into a single PDF.

3.5.7 Viewing Tile Details

The customer can click the **Full Page** icon to navigate to the full page view from the tile.

NOTE: This functionality is not available on all tiles. The **Full Page** icon is not displayed on tiles where there is no full page view. For example, **Engagement** reports do not have a **full page** view.

To navigate to full page view

1. Click the **Full Page** icon on the **Service Request** tile.

   The **Service Request** page is displayed.

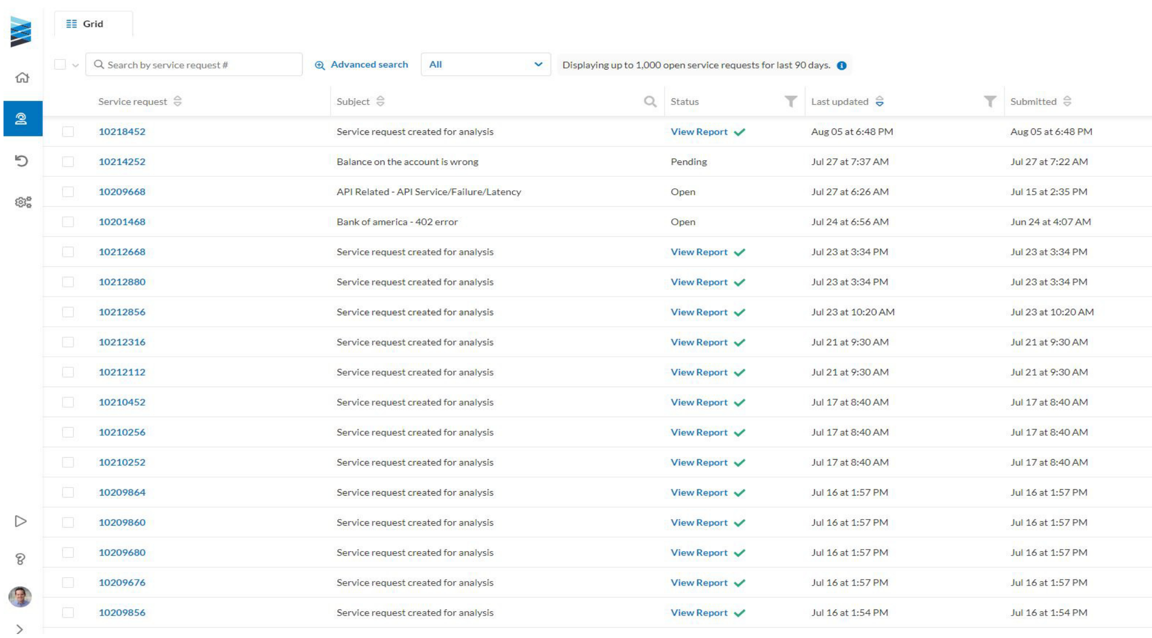


Fig. 3-16: Sample of Service Request full page view

3.5.8 Dashboard Service Request ID Link

Clicking the **Service Request ID** on a **Service Request** tile navigates to the **Service Requests** page and automatically opens that specific service request.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

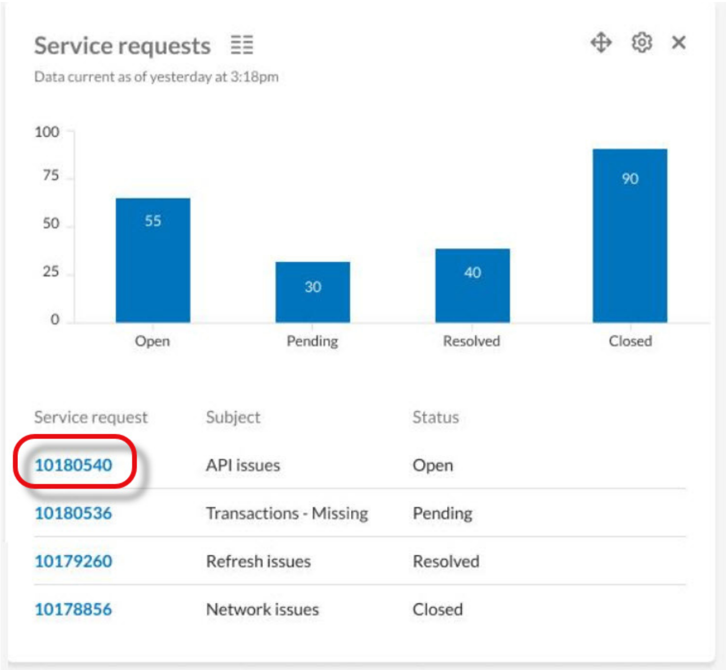


Fig. 3-17: Service request ID link

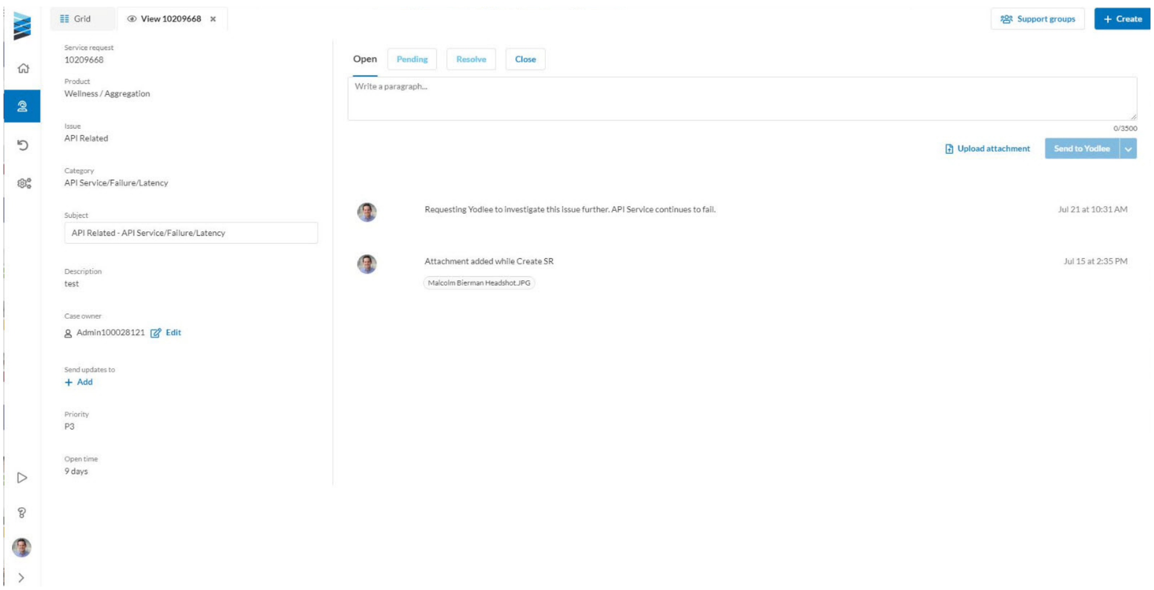


Fig. 3-18: Details of an SR

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

On the **SR details** page, customer can view the details of SR and edit few fields as per the requirements. .

Table 3-3: Field displayed on the SR details page

Field	Description
Service Request	Displays the unique ID of the SR.
Product	Displays the name of the product
Issue	Displays the type of issue
Category	Displays the type of category
Subject	Displays the subject of the SR. The subject can be changed at any time before the service request is closed.
Description	Displays the description.
Case Owner	Displays the assignee of the service request. The assignee can be changed at any point in time while the service request is open.
Priority	Displays the priority of the service request.
Send updates to	Displays the name of other users who have been copied for updates on the service request. Clicking **+Add** allows the user to add recipients to the service request.
Open times	Displays how long the service request has been open.
Open/Pending/Resolved/ Closed	Displays the current status of the service request.
Upload attachment	Opens the attachment dialog box where users can add files to the worklog for a service request.
Send to Yodlee	Worklog entries can be shared internally or with the Yodlee Client Services team. • **Send to Yodlee** - Notes sent to Yodlee are visible to both members of the user's organization and Yodlee. Use the Send to Yodlee option to share notes with the Yodlee Client Services team. • **Send internal note** - Internal notes are visible only to members of the user's organization.
Support groups	Support Groups allows specific groups to be assigned to service requests. There are no restrictions on the number of groups that can be created and users can be assigned to multiple groups. The creation of Support Groups is a feature controlled by Permissions. Users assigned to a Role that has the Support Groups permission enabled can create Support Groups. Users assigned to a Role without this Permission enabled will not see this button displayed on the **Service Requests** page.
Create	Customer can create an SR by clicking **+ Create**. For more information about creating an SR, see *Creating a Service Request on page 4-8*

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 4: Support

4.1 Introduction

The pages grouped under the **Support** section of the menu help users create and manage service requests as well as find and act on information related to customers, sites, and the status of the **My Yodlee** application.

The following pages are found under the menu's Support section:

- Service requests
- Customers
- Sites
- Status

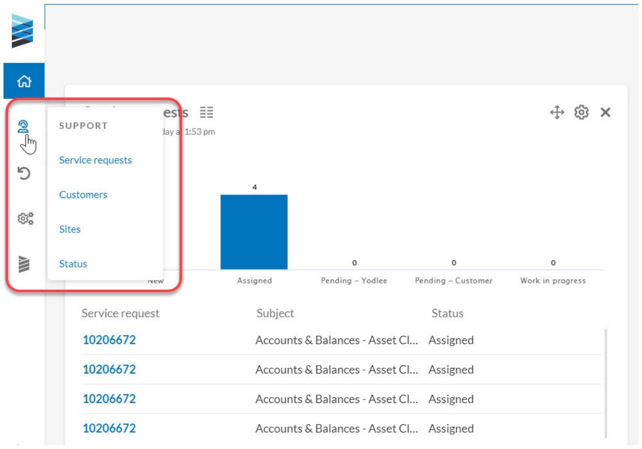


Fig. 4-1: Support menu

4.2 Service Request

The **Service Request** page is laid out in a grid view that allows easy and efficient searching, sorting, and filtering to manage service requests. Service requests can be filed by any user, including the the Yodlee Client Services team YCS on behalf of another user. Access to the **Service Request** page is controlled via Permissions (for more information about the **Permissions**, see *Permissions on page 6-1* and can be enabled or disabled based on a particular role. The **Service Request** page contains an automated analysis tool available through the **Create Service Request** workflow. For more information about the **Permissions**, see *Automated Analysis on page 4-10*)

On the **Service Requests** page, up to 1000 service requests updated in the last 90 days can be viewed, provided the service requests have not been closed. To view closed service requests or non-closed service requests which exceed the 1000 limit, please use the search bar or **Advanced Search** functionality. For more information about the advanced search functionality, see *Searching by Service Request ID on page 4-5*. Service requests that

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

are processed through the automated analysis tool will display the **View Report** status. These reports are available for review directly on the **Service Requests** page.

4.2.1 Service Request ID Link

Clicking a **Service request ID** will display the full details and worklog entries for a service request. The full details will be displayed in a new tab on the **Service Request** page. Multiple tabs can be opened simultaneously and these tabs will remain open on the **Service Request** page in-session until they are closed.

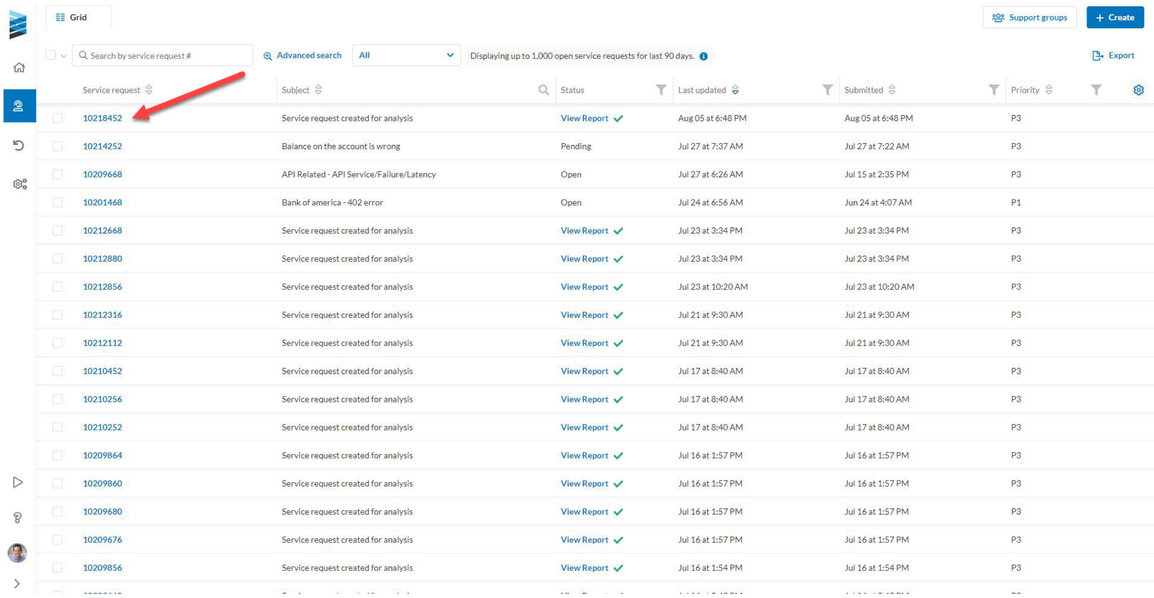


Fig. 4-2: Service request link

NOTE: Full details for a service request can also be opened directly from the **Service Request** tile on the **Dashboard**. For more information, see *Dashboard Service Request ID Link on page 3-16*.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

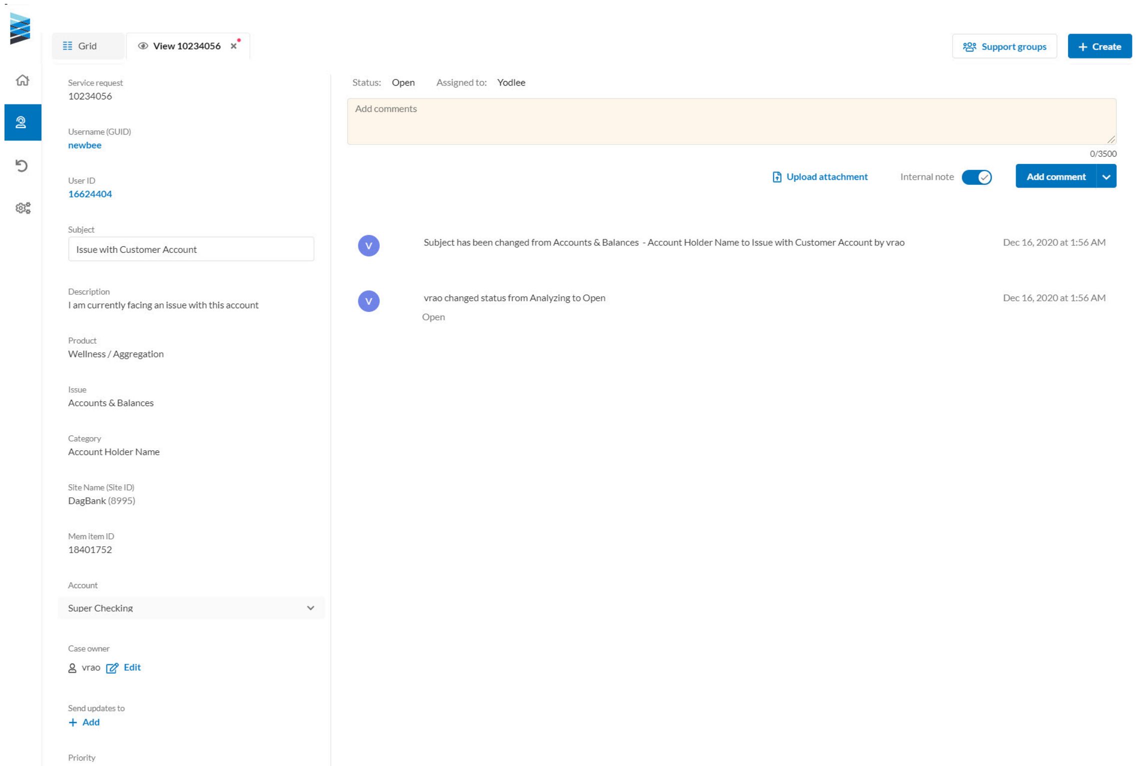


Fig. 4-3: Details of an SR

On the SR details page, customer can view the details of SR and edit few fields as per the requirements.

The full page view of the service request contains the following details: .

Table 4-1: Field displayed on the SR details page

Field	Description
Service Request	Displays the unique ID of the service request.
Product	Displays the name of the product
Issue	Displays the type of issue
Category	Displays the type of category
Subject	Displays the subject of the SR. The subject can be changed at any time before the service request is closed.
Description	Displays the description.
Case Owner	Displays the assignee of the service request. The assignee can be changed at any point in time while the service request is open.
Priority	Displays the priority of the service request.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-1: Field displayed on the SR details page

Field	Description
Send updates to	Displays the name of other users who have been copied for updates on the service request. Clicking **+Add** allows the user to add recipients to the service request.
Open times	Displays how long the service request has been open.
Status	Displays the current status of the service request (Open/Pending/ Resolved/Closed).
Assigned to	Displays to whom the service request is assigned at any point in time [You (your organization) or Yodlee].
Upload attachment	Opens the attachment dialog box where users can add files to the worklog for a service request.
Internal note	User 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 or Add comment	The options listed in the **Send Back To Yodlee** or **Add Comment** drop-down menu will change dynamically based on the current status of the service request. The available options are: • **Send Back to Yodlee** - User can reassign the ticket to Yodlee. • **Mark as Resolved** - When a reported issue is resolved, user can change the status of a ticket to Resolved. Marking the ticket as resolved will not close the SR and the user can track the ticket post resolution. The auto-closure window set by the organization will change resolved tickets to close once the window expires. • **Add comment** - Selecting **Add Comment** will add the inputs to the service request without changing the status. • **Close Service Request** - Marking the SR as closed will close the SR.
Support groups	Support groups allows specific groups to be assigned to service requests. There are no restrictions on the number of groups that can be created and users can be assigned to multiple groups. The creation of Support Groups is a feature controlled by **Permissions**. Users assigned to a Role that has the Support Groups permission enabled can create Support Groups. Users assigned to a Role without this Permission enabled will not see this button displayed on the **Service Requests** page.

4.2.2 Viewing the Service Request Page

The **Service Request** page contains many sorting, searching, and filtering capabilities. All service requests without any applied filters will be displayed by default.

The **Grid** tab provides easy navigation back to the **Service Request** page while viewing or creating a service request.

To view the Service Request page

Using the left navigation menu, the user can do the following actions:

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

- ○ Expand the menu, click on **Support** and then click **Service Requests**
- ○ Hover over the **Support** icon and click **Service Requests**.

1. On the **My Yodlee** page, click **Support**.

   The **Support** menu is displayed.

2. Click **Service Requests**.

   The **Service Request** page is displayed.

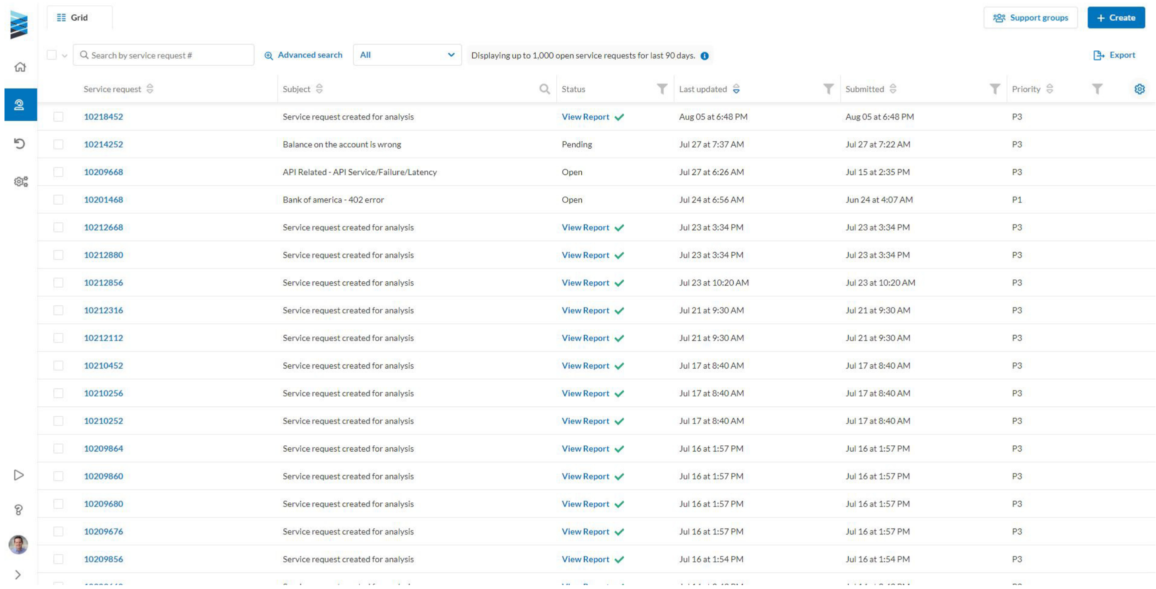


Fig. 4-4: The Service Requests page

4.2.2.1 Searching by Service Request ID

Customers can search for a particular Service request (SR) in three ways:

- By entering the Service Request ID in the **Search by service request #** field
- Using the **Advanced Search** functionality.
- Using the column level search, sorting, and filtering capabilities.

NOTE: 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

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

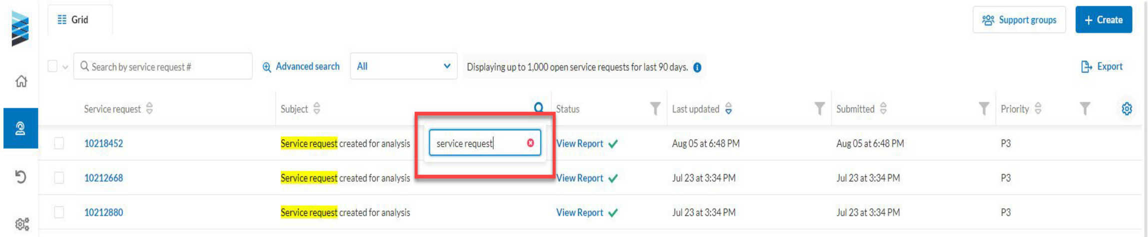


Fig. 4-5: Column level search

The **Advanced Search** functionality will return any and all service requests which meet the search criteria. Click **Advanced Search** to open the **Advanced Search** window.

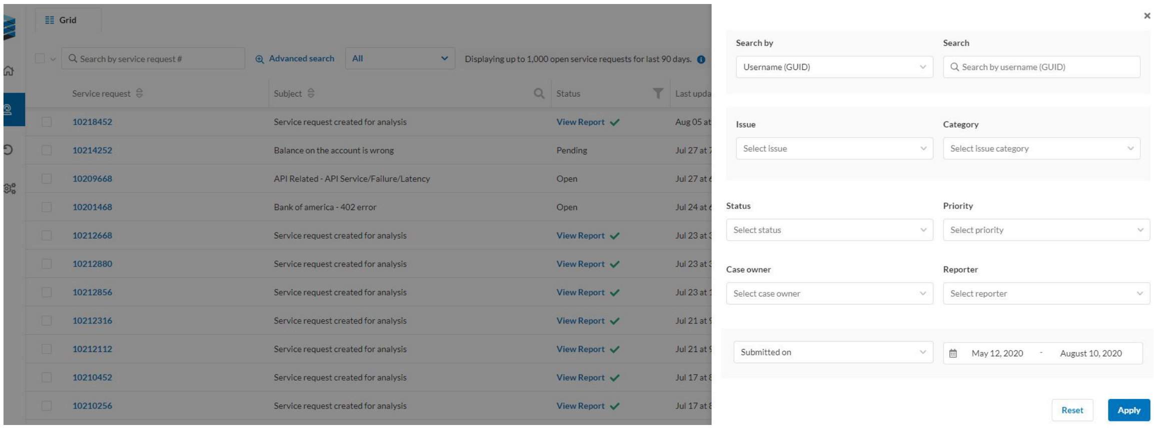


Fig. 4-6: The Advanced Search window

Table 4-2: Fields on Advanced Search window

Fields	Description
Search by	Select the search by options from the drop down. The available options are: • Username (GUID) • Email address • Frist and last name • Content service ID • Site ID
Search	Field to enter the desired Search by criteria.
Issue	Select the issue from the drop down. The user can select more than one issue.
Category	Select the category from the drop down. The user can select more than one category.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-2: Fields on Advanced Search window

Fields	Description
Status	Select the status from the drop down. The user can select more than one status. The available options are: • Open • Pending • Resolved • Closed • Analyzing • View Report
Priority	Select the priority from the drop down. The user can select more than one priority. The available options are: • P1 • P2 • P3 • P4 • P5
Case owner	Select the case owner's name from drop down.
Reporter	Select the reporter's name from the drop down.
Date Selection	The available options are: • Submitted on • Resolved on • Closed on • Last updated on Select from date and to date between which the SRs were created.

4.2.2.2 Search Indicator for Service Request

Whenever a search/filter is applied on a specific column, the user will see an indicator at the top of the grid displaying the search/filter which has been applied. If multiple searches/filters have been applied, the user will see indicators for all active searches/ filters.

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** option.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

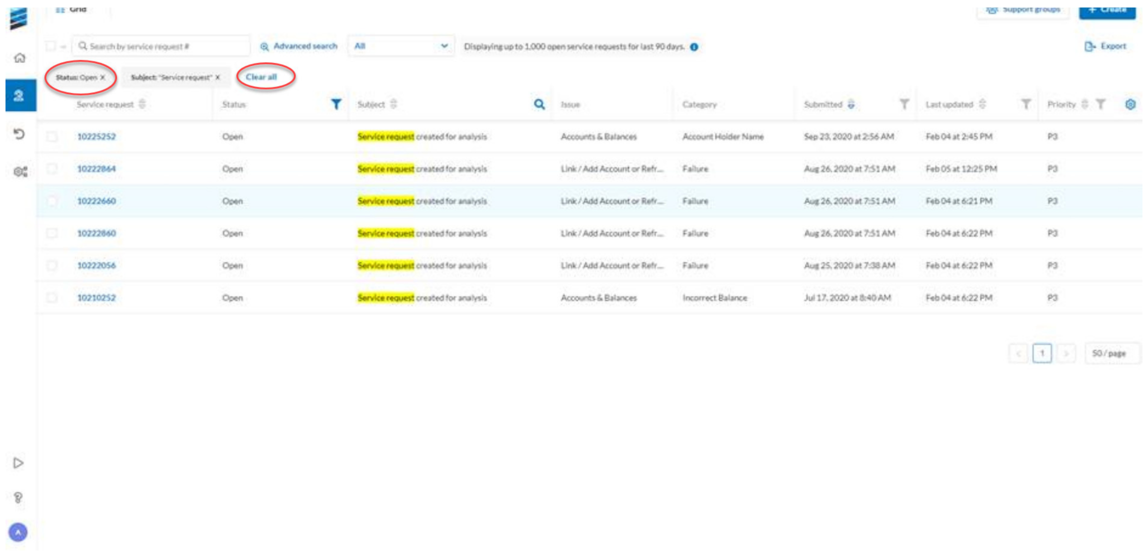


Fig. 4-7: Search indicator showing the search/filters

4.2.3 Creating a Service Request

The customer can click +**Create** on the **Service Request** page to start the process of creating a new service request.

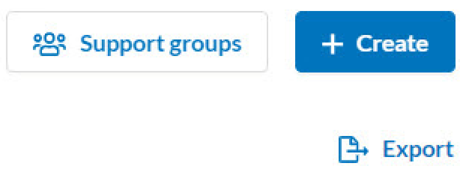


Fig. 4-8: Button to create an SR

There are two workflows for creating a service request:

- **Normal service request** - The user can fill in the mandatory fields, provide a description of the issue, change editable fields and submit the service request. For more information, refer to *Creating a Normal Service Request on page 4-8*
- **Automated Analysis** - The user can fill in the mandatory fields and submit the service request for automated analysis. request. For more details, refer to *Automated Analysis on page 4-10*.

4.2.3.1 Creating a Normal Service Request

The automated analysis tool is only available for specific Product/Issue/Category selections made during the service request creation workflow. If the automated analysis tool is not available based on these selections, then the user can follow the standard process for submitting a service request. The user will know this is a normal service

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

request workflow because they will be presented with a description box, additional editable fields, and the Submit button will be displayed.

The user can create a new service request by clicking **+Create** on the **Service Request** page. This will initiate the service request creation workflow.

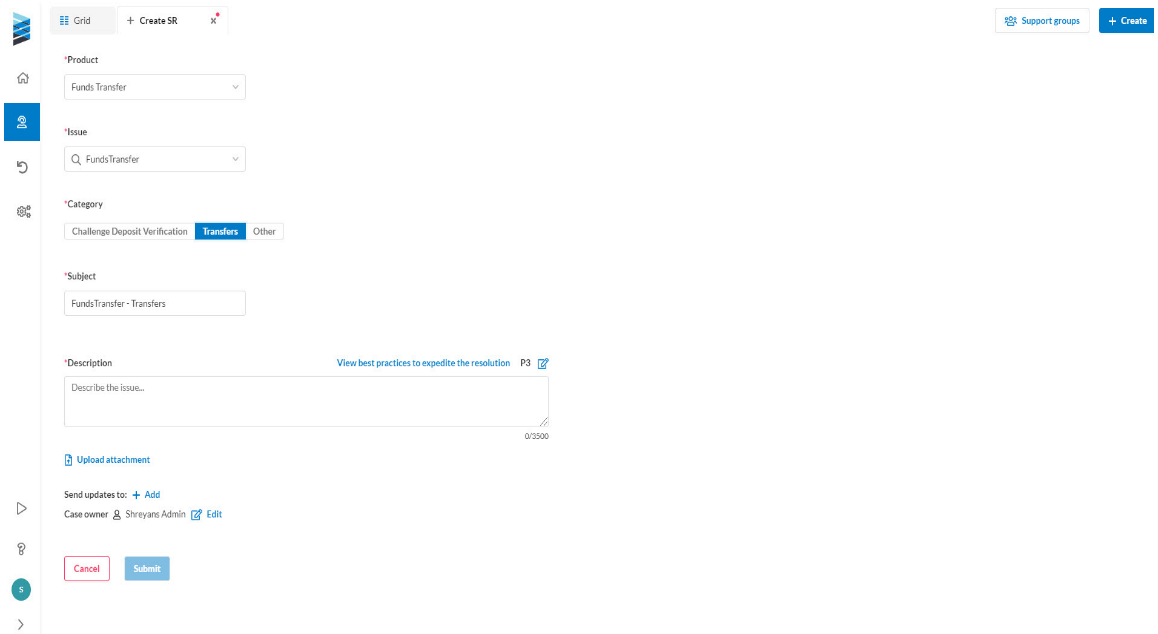


Fig. 4-9: Service Request page displaying the Submit button

In the above page (*Figure 4-9*) clicking **View best practices to expedite the resolution** displays a dialog box showing the list of best practices. Clicking **Copy** icon automatically fills in the best practices checklist into the **Description** field of the Service request.

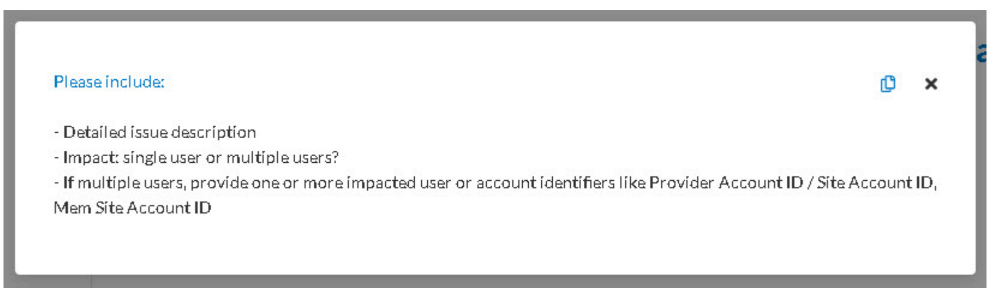


Fig. 4-10: Best practice list dialog box

NOTE: If multiple products are enabled, the user can select a product from the drop-down list. Once a product is selected, the **Issue** field is populated. After the **Issue** field is populated, the user can categorize the issue based on the available **Category** options. **Search by** and **Search** will be displayed after selecting the **Category**.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-3: Fields on the Normal Service Request page

Field	Descriptions
Product	Select the product from the drop-down list.
Issue	The Issue list will be presented after selecting a **Product**. Select an issue from the drop-down list or use the search option to search for an issue.
Category	After choosing the **Issue**, the corresponding categories are displayed dynamically based on the Issue choice made. Select the category from the list of options displayed.
Subject	The **Subject** field will be automatically populated based on the **Issue** selected. The **Subject** field can be changed prior to submitting a service request.
Description	The user can give his description to provide more details about the issue. In some cases, a best practices checklist will be shown. If available, open the best practices checklist to see the description details that will help expedite the resolution of the service request. The list of best practices can be auto-filled into the **Description** field by clicking **Copy** icon.
Priority	Click the priority button to select the priority. The available priorities are: • P1 • P2 • P3 • P4 • P5
Upload document	This is an option to attach files to a service request. The user can upload up to five attachments based on the acceptable file type and size.
Send Updates to	Click **Add** to add additional users to be copied on email correspondence related to the service request. For more information, see Help page - Using the automated resolution engine video.
Case Owner	Click **Edit** to add case owners or replace the existing case owner.

On clicking **Submit**, the **Service Request** page is displayed where the SR will be listed on the page with the status as **Open**.

4.2.3.2 Automated Analysis

Based on the Product/Issue/Category selections made during the creation process, a service request may be available for automated analysis. The user will know the automated analysis tool is available if the submit button shows **Analyze**. On clicking **Analyze**, the service request will be sent to Yodlee for automated analysis. The automated analysis tool provides responses to common service requests in 15 minutes or less. For more information, see *Analyzing a Service Request on page 4-12* and the **Help** page - Using the automated resolution engine video.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

To create a Service Request using the automated analysis tool

Follow the same steps outlined in section *Creating a Normal Service Request on page 4-8* for creating a service request. If the service request is available for automated analysis, the user can search for a customer, account, or site for the service request and will be presented with the **Analyze**.

NOTE: If the automated analysis tool is available, the **Analyze** button (*Figure 4-11*) will be displayed. If the service request is not available for automated analysis, the **Submit** button (*Figure 4-9*) will be displayed.

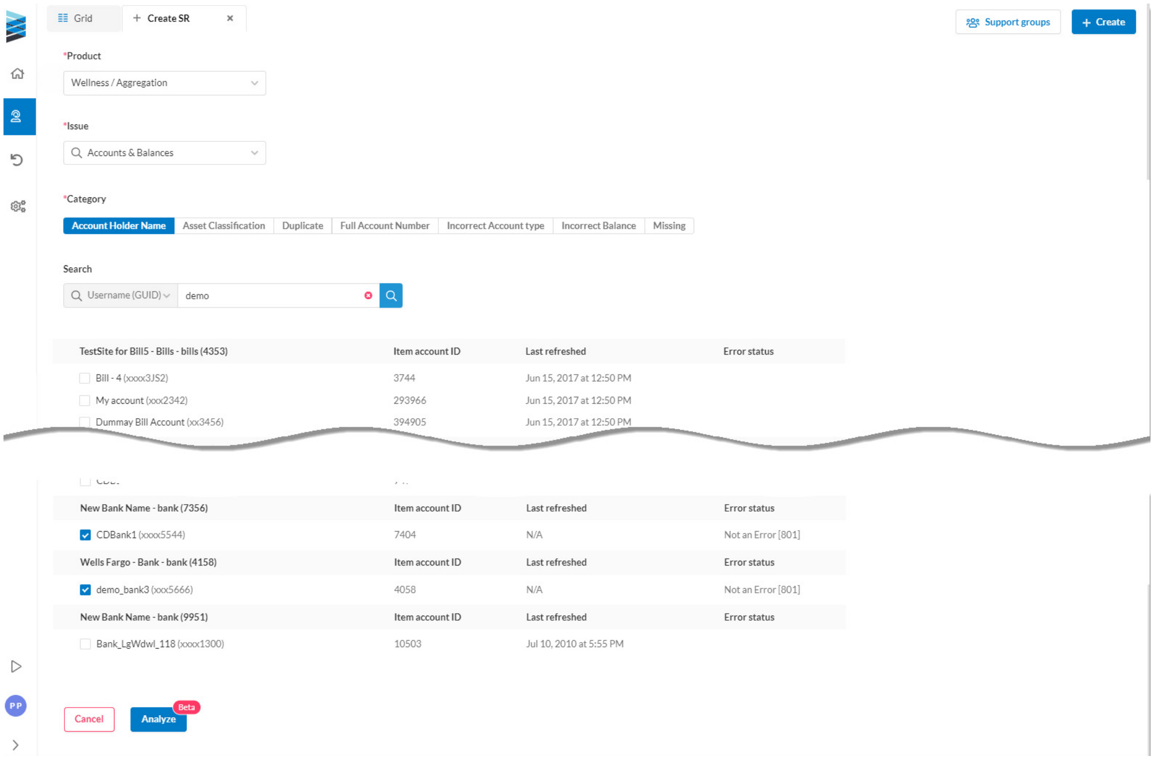


Fig. 4-11: Automated analysis tool-enabled SR submission page displaying Analyze button

Table 4-4: Fields on the automated analysis tool enabled SR submission page

Field	Description
Product	Select the product from the drop-down list.
Issue	The **Issue** list will be presented after selecting a **Product**. Select an issue from the drop-down list or use the search option to search for an issue.
Category	After choosing the Issue, the corresponding categories are displayed dynamically based on the Issue choice made. Select the category from the list of options displayed.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-4: Fields on the automated analysis tool enabled SR submission page

Field	Description
Search	Search for a customer, account, or site against which to file a service request. **NOTE:** Selecting multiple customers or accounts will create multiple service requests.
Closed and Deleted accounts	Open/Active accounts are shown by default. To see Closed/Deleted accounts, expand the drop-down list. Service requests can be filed on closed or deleted accounts.

Once the analysis has been triggered, the user is automatically redirected back to the **Service Request** page. The automated analysis will continue to run in the background, allowing the user to navigate to other areas of the **My Yodlee** application.

4.2.4 Analyzing a Service Request

Once the automated analysis has been triggered, the status of the service request will show as **Analyzing**. Analyzing is a temporary status.

For more information about the automated analysis tool, see *Automated Analysis on page 4-10*.

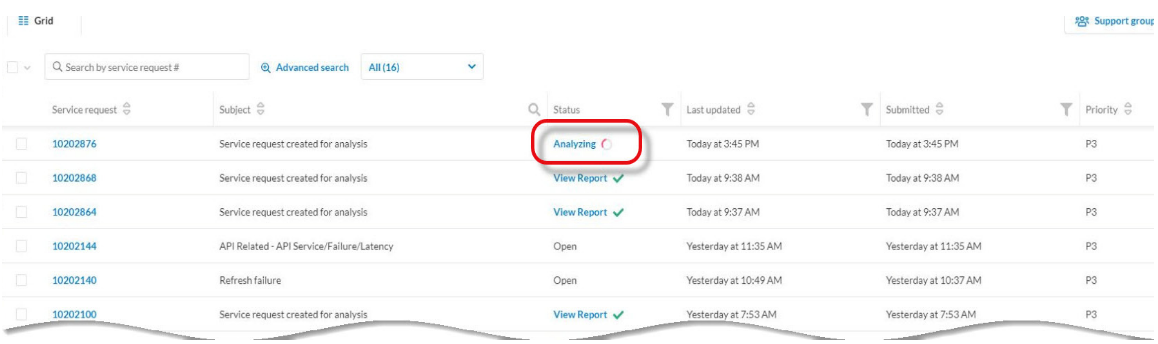


Fig. 4-12: Analysis link to analyze the service request

4.2.4.1 Escalating or Canceling an Automated Analysis

In most cases, the automated analysis response will be delivered in 15 minutes or less. While the analysis is ongoing, the user can click **Analyzing** to view the analysis in progress.

The user can cancel the analysis for any reason by clicking **Close Service Request**. This will stop the analysis and close the service request.

The user can also bypass the analysis workflow and escalate a service request directly to a the Yodlee Client Services team. Clicking **Contact Yodlee Support Representative** will stop the analysis and initiate the manual service request creation workflow. For more information, see *Creating a Service Request on page 4-8*.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

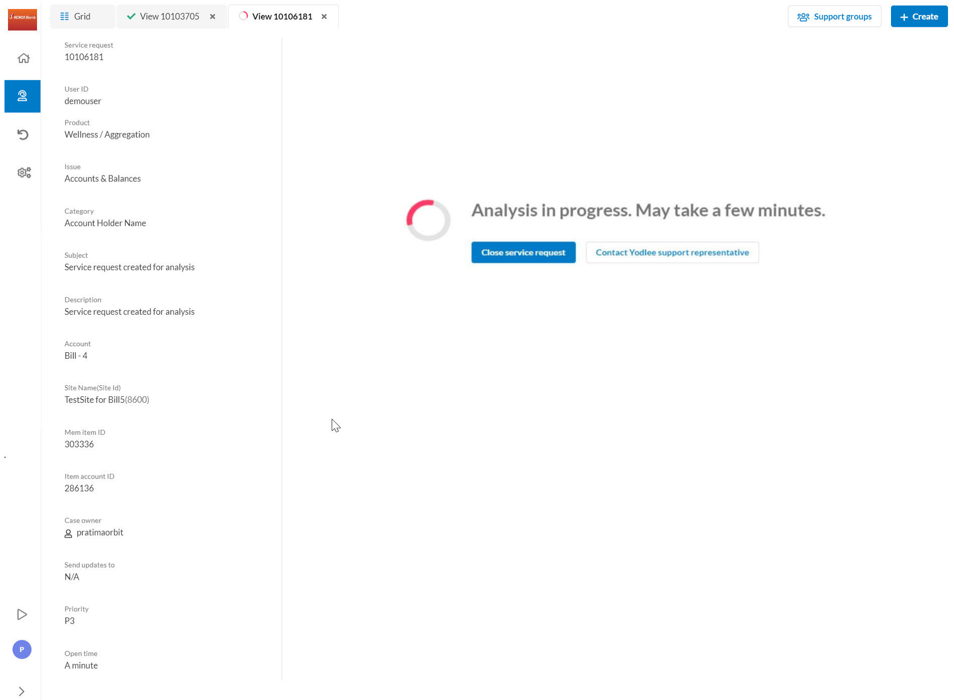


Fig. 4-13: Analysis is in progress page

To cancel an automated analysis or to escalate a service request

1. Click **Contact Yodlee Support Representative**.

   The fields shown below are displayed.

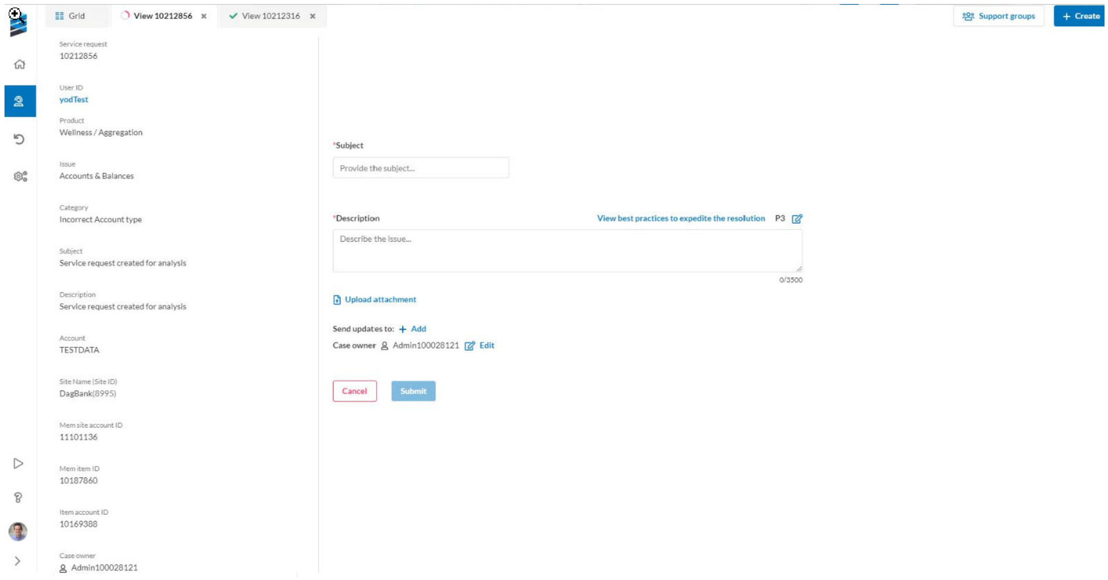


Fig. 4-14: Page to contact Yodlee Support Representative

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-5: Field on the Contact Yodlee Support Representative page

Field	Description
Subject	The **Subject** field will be automatically populated based on the Issue selected. The **Subject** field can be changed prior to submitting a service request.
Description	Enter the description to provide more details about the issue. In some cases, a best practices checklist will be shown. If available, open the best practices checklist to see the description details that will help expedite the resolution of the service request. The list of best practices can be autofilled into the **Description** field by clicking the **Copy** icon.
Upload Attachment	This is an option to attach files to a service request. The user can upload up to five attachments based on the acceptable file type and size.
Followers	Users who are added as followers to a Service Request.
Case Owner	Enter the case owner's name or edit/add more case owner's names.

2. Click **Submit**.

   A confirmation will temporarily appear once a service request has been submitted successfully. The message will contain the Service Request ID assigned to the newly created service request and it will also appear on the **Service Request** page.

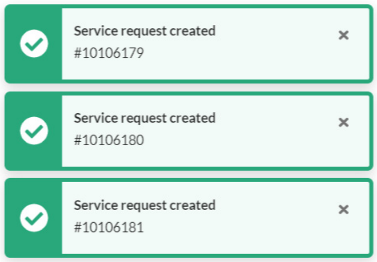


Fig. 4-15: Service request created success message

4.2.5 Viewing a Report

Once the automated analysis tool analyzes the service request, the status of the service request will change to **View Report**.

The user can click **View Report** to view the findings of the analysis.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

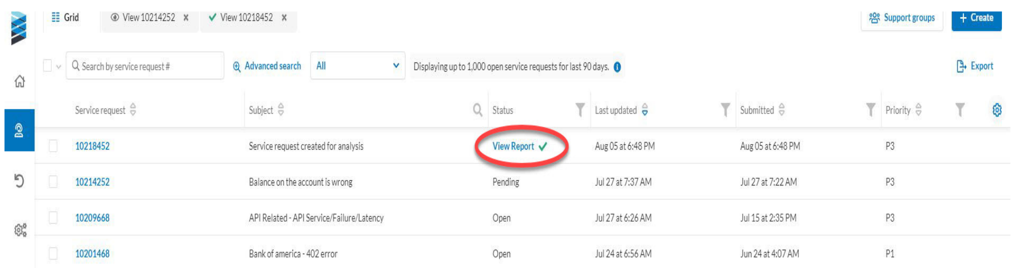


Fig. 4-16: View Report link

The report will show an appropriate message based on the results of the analysis. There are two basic types of reports that will be displayed to the user.

In the example below, the analysis indicates further investigation is required and the user will be asked to provide additional details about the issue they are facing. For more information, see *Creating a Service Request on page 4-8*.

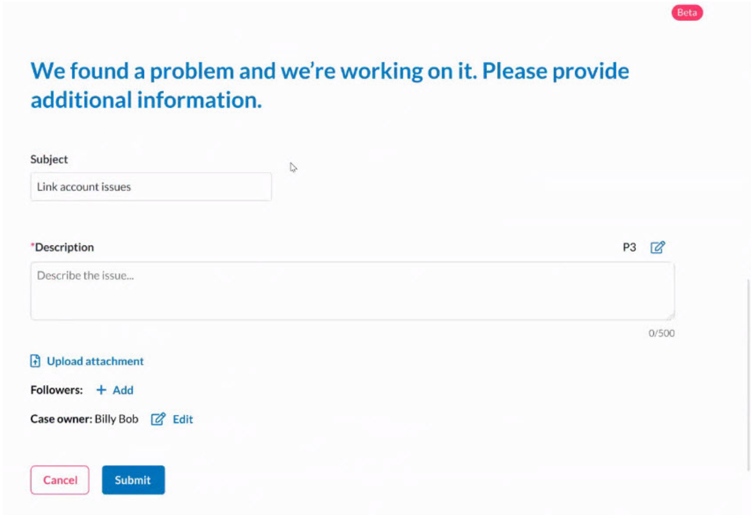


Fig. 4-17: Automated analysis report requiring additional information

Table 4-6: Fields on the additional information page

Field	Description
Subject	The **Subject** field will be automatically populated based on the Issue selected. The **Subject** field can be changed prior to submitting a service request.
Description	The user can give his description to provide more details about the issue. In some cases, a best practices checklist will be shown. If available, open the best practices checklist to see the description details that will help expedite the resolution of the service request. The list of best practices can be auto-filled into the Description field by clicking Copy icon.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-6: Fields on the additional information page

Field	Description
Upload attachment	This is an option to attach files to a service request. The user can upload up to five attachments based on the acceptable file type and size. Upload documents that are acceptable file types and sizes as displayed to support or give more information about the SR.
Followers	Users who are added as followers to a Service Request.
Case Owner	Click Edit to add case owners or replace the existing case owner..

The user may also be provided with a detailed report listing what was checked, what was found, and the next best action to take for this service request.

More details about what was checked, what was found and up to the last five refreshes (and status of these historical refreshes) for the account are available (collapsed by default). More details may also include the Site URL.

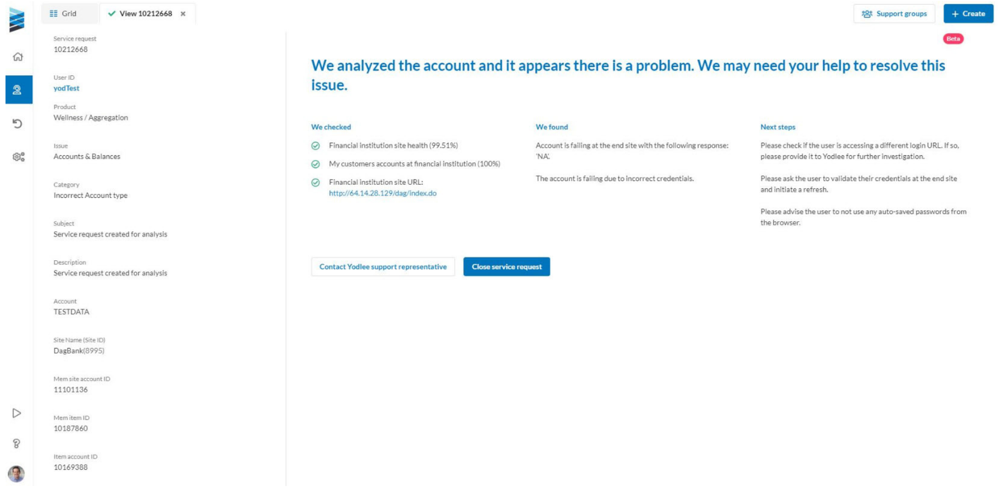


Fig. 4-18: Automated analysis with problem result sample report

After viewing the report, the user can take one of three actions on this service request.

- Clicking **Close service request** will close this service request. The status of the service request will change to **Closed**.
- Clicking **Contact Yodlee Support Representative** will initiate the manual service request workflow to escalate a service request to Yodlee. For more information, see *Figure 4-19*. The status of the service request will change to **Open** when the service request is escalated to Yodlee.
- Close the tab and navigate to another page. The Service Request status will remain as **View Report** and no action will be taken until the user follows steps 1 or 2 outlined above.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

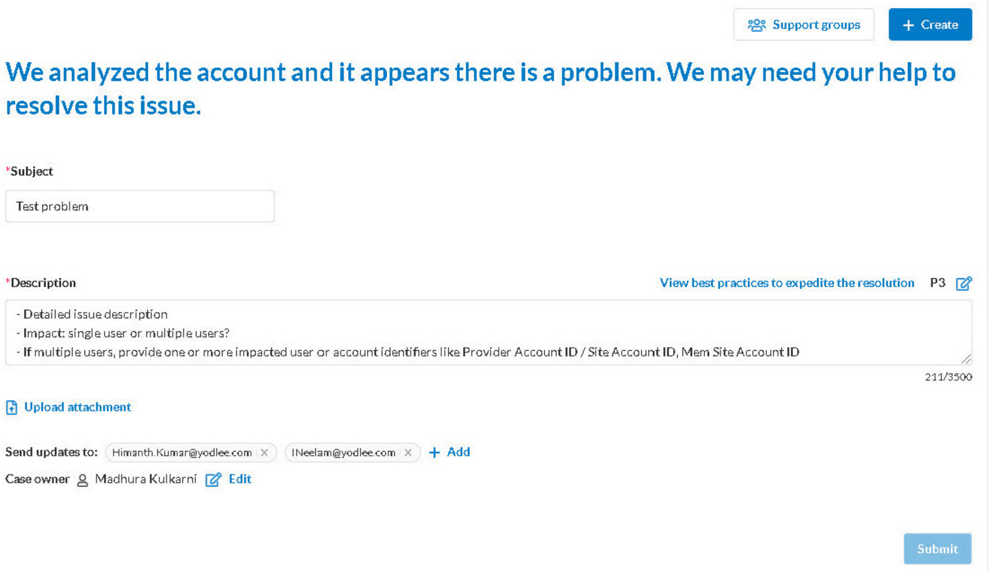


Fig. 4-19: Automated analysis sample report

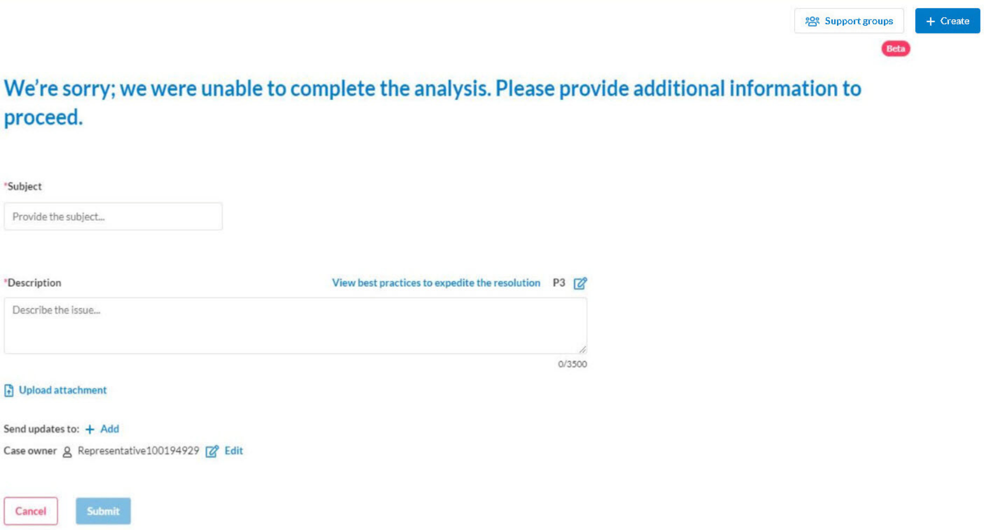


Fig. 4-20: Automated analysis asking for additional information sample report

4.3 Sites

The Sites page provides users with details about sites used to support other product offerings from Yodlee, including Aggregation and Verification. All site information, including alerts and history, is available on the Sites page.

NOTE: The **Service Insights** page is still accessible via the Classic page.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

4.3.1 Viewing Sites Page

The **Sites** page lists the Site ID, Site name, Base URL, Login URL, MFA type, Supported account types, and Country. These columns can be added, rearranged, or removed from the page depending on the user's preferences.

To view a Sites page

1. Using the left navigation menu, the user can
   - Expand the menu, click **Support** and then click **Sites**.
   - Hover over the **Support** icon and click **Sites**.
2. On the **My Yodlee** page, click **Support**.

   The **Support** menu is displayed.
3. Click **Sites**.

   The **Sites** page is displayed.

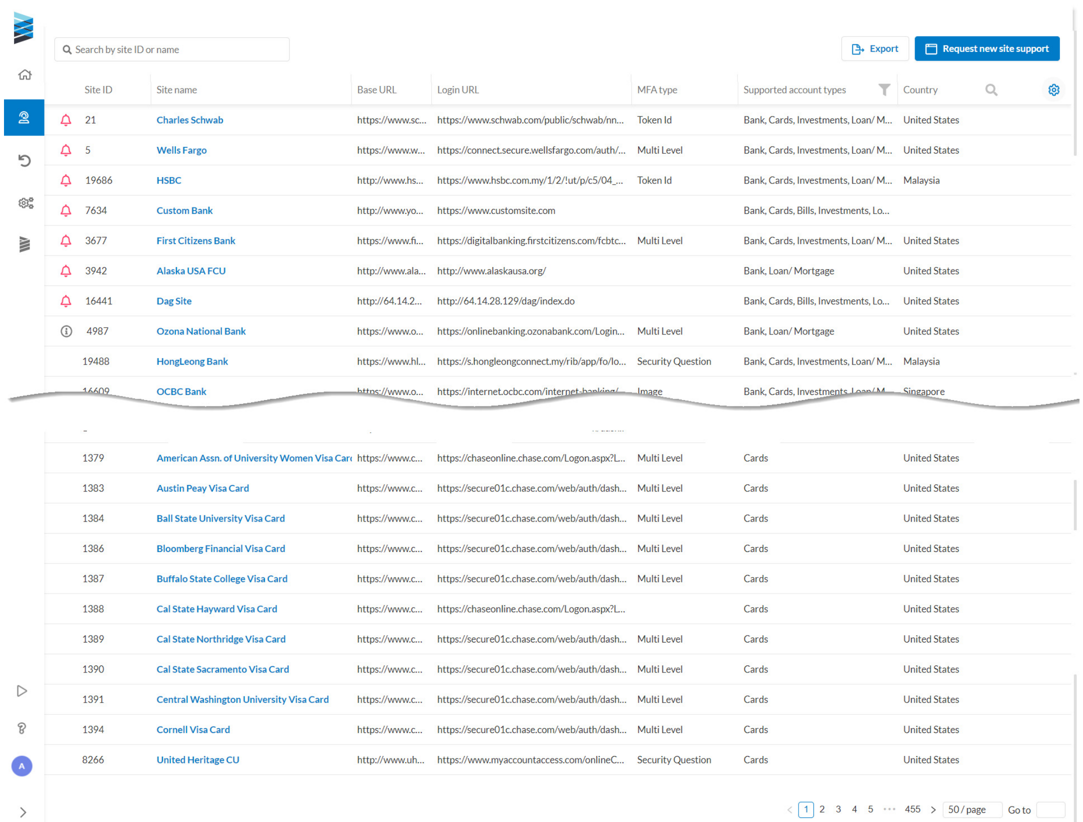


Fig. 4-21: Sample of Sites page

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-7: Fields on the Sites page

Fields	Description
Search by	Search by Site ID or name to find a specific site
Export	Clicking **Export** will download CSV/Excel file with all the details on the **Site** page. For easy sorting and filtering within a CSV/Excel file, the date format in the exported CSV/Excel file has been enhanced to render as MM/DD/YY h:mm.
Request Support for a new site	Unique ID associated with a site. For more information, see *Requesting New Site Support on page 4-22*
Site ID	Unique ID associated with a site. If the site has any alerts a **Bell** Icon is displayed against the Site ID. For more information about the Bell icon, see *Viewing Site Alerts on page 4-19*
Site Name	Lists the site name. Clicking **Site Name** displays the underlying details for a site including specific details for different account types. For more information, see *Viewing Site-Specific Information on page 4-21* Historical alert information for the past 30 days is displayed for each site. If there is no active alert, the Information icon is displayed that provides historical alert information.
Base URL	Displays the base URL.
Login URL	Displays the login URL.
MFA Type	If applicable, the site's MFA type is displayed.
Support Account Types	Displays the types of accounts supported by the site.
Country	Displays the country name.

4.3.2 Viewing Site Alerts

Sites with active alerts will appear first on the **Sites** page. Whenever there is an active alert for a site, the **Bell** icon will appear next to the Site ID.

Clicking the **Bell** icon will display the active site alert(s) for the site. The alert may contain the following details:

- Site Name
- Site ID
- URL
- Status
- Impact
- Estimated Resolution Time

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

- Description
- Impacted Account types
- Last Updated
- Start Date
- Error Code

The user can also scroll down to see recent history for a site to understand how the site is performing over time.

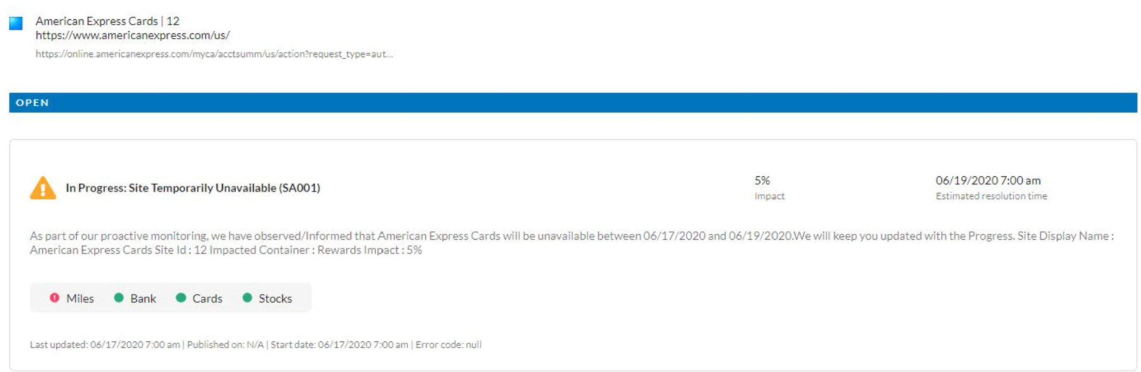


Fig. 4-22: Site Alert dialog box

Table 4-8: Fields on the Site Alert dialog box

Fields	Description
Site ID	Displays the unique ID associated with a site.
Site Name	Displays the name of the site
URL	Login URL
Status	Current status of the alert
Impact	Impact based on customer volume
Estimated Resolution Time	Latest update provided by Yodlee on the timeline for resolving the current issue
Description	Description of the issue
Impacted account types	All account types available for the site will be displayed. Impacted account types will be identified by the red alert icon next to the account type.
Last Updated	When the alert was last updated by Yodlee
Published on	When the alert was published by Yodlee.
Start Date	When the Yodlee Client Services team started troubleshooting the alert.
Error code	If available, the error code associated with the current issue.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

4.3.3 Viewing Site History

If there are no active site alerts for a site, the user may see an **Information** icon next to the Site ID. The **Information** icon provides recent history about a site to understand how it is performing over time.

If there is no recent history for a site, then no icon will appear next to the Site ID.

Clicking the **Information** icon displays the history of the site.

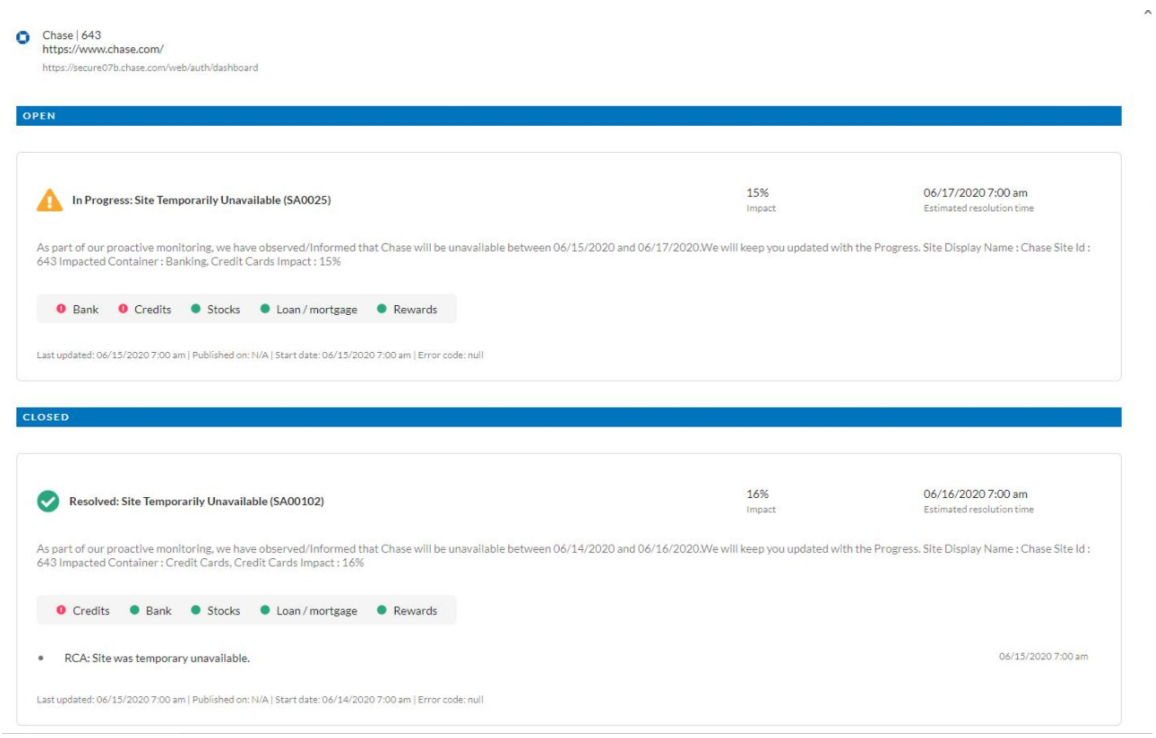


Fig. 4-23: Site history page

4.3.4 Viewing Site-Specific Information

Clicking **Site Name** (*Figure 4-22*) displays additional details about the site and underlying account types. Account type status and usage information is specific to an organization. The following data points can be found on the Site-specific details page:

- Type of account
- Sum info ID
- Support status
- Auto refresh
- Quality
- Value

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

- Customers
- Volume by # of accounts

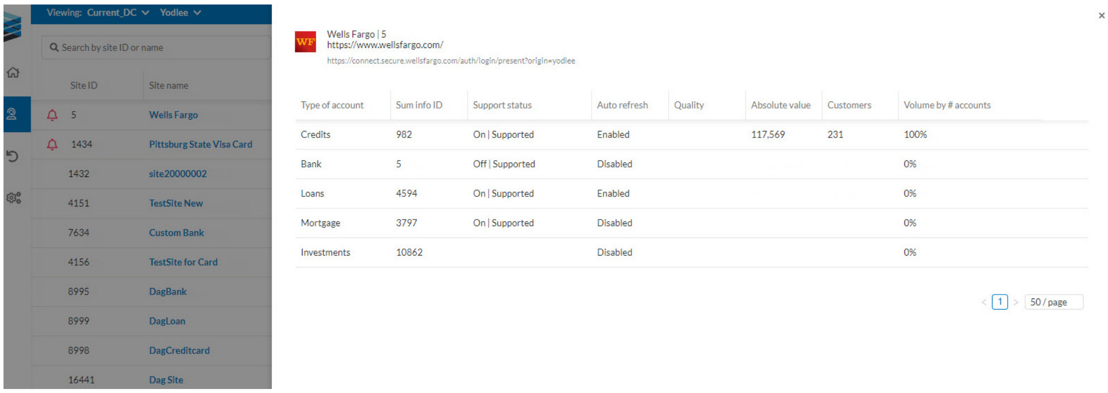


Fig. 4-24: Information of a site

Table 4-9: Fields on the Site-Specific details page

Field	Description
Type of account	Displays the account type
Sum info ID	Displays the ID associated with that particular account type for a site
Support status	Displays the current support status that includes: • On/Off • Supported - Account type is supported • Supported Beta - Account type supported in beta • Not Searchable - Account type is currently unavailable due to a prolonged outage or issue • Not available - Account type is not supported
Auto refresh	Displays if auto-refresh is enabled or disabled for an account type.
Quality	Grading for data quality. Only available for investment account types.
Value	Value of the accounts for this account type. This is customer specific.
Customers	Number of customers with this account type. This is customer specific.
Volume by # of accounts	Volume by account type as a percentage of overall accounts for a specific site. This is customer specific.

4.3.5 Requesting New Site Support

Click **Request New Site support**, found at the top of the **Sites** page, to request support for a new site. The user will be redirected to the service request creation workflow. Follow the steps for filing a service request to initiate a request to support a new site.

4.4 Customers

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

The **Customers** page provides a single page where all of an organization's customers and accounts can be viewed.

4.4.1 Viewing the Customer Page

The customer can click the **Link** icon to have the full/detailed **Customer** page view.

To view full/detailed Customer page

Using the left navigation menu, the user can

- Expand the menu, click **Support** and then click **Customers**
- Hover over the **Support** icon and click **Customers**

1. On the **My Yodlee** page, click **Support**.

   The **Support** menu is displayed.

2. Click **Customers**.

   The **Customers** page is displayed.

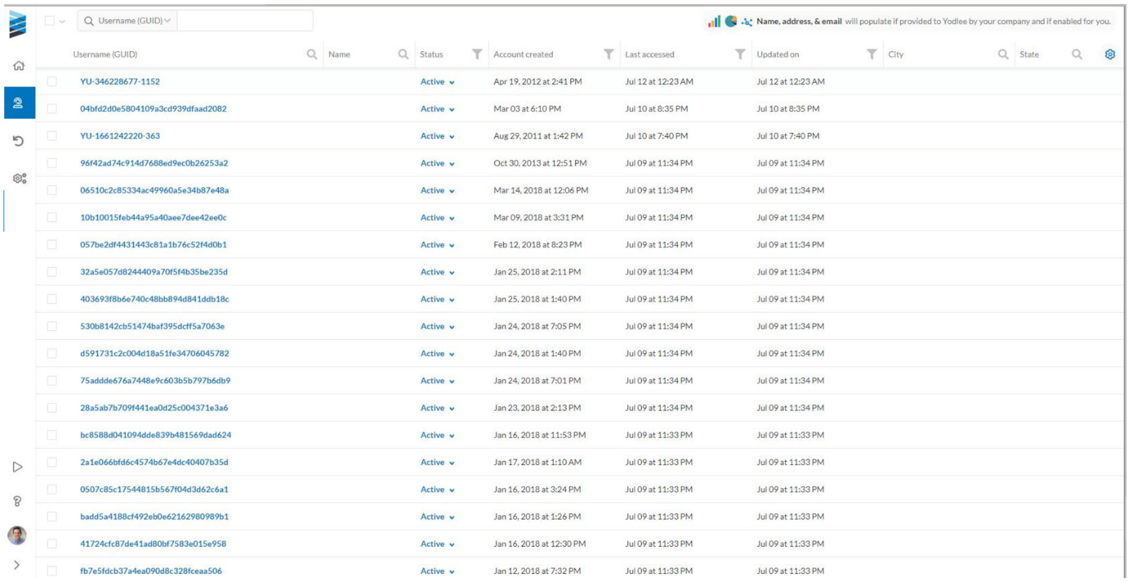


Fig. 4-25: The Customers Summary page

Table 4-10: Filters on the Customer page

Fields	Description
Username (GUID) GUID - Globally Unique Identifier	Displays the Username (GUID) for a customer
Name	Displays the customer name. This information will populate if provided to Yodlee and is made visible for a **Role** under the **Permissions** page.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-10: Filters on the Customer page

Fields	Description
Status	Displays the status of a customer. The following statuses can be applicable: • Active • Inactive • Suspended Deleted customers are not shown.
Account Created	Displays the date on which the customer was created in the My Yodlee application.
Last accessed	Displays when the customer last accessed their accounts.
Updated on	Displays when the customer's profile was last updated.
City	Displays the city for a customer if provided as part of the address during user registration and is passed to Yodlee. This field can be made visible for a **Role** through the **Permissions** page.
State	Displays the state for a customer if provided as part of the address during user registration and is passed to Yodlee. This field can be made visible for a **Role** through the **Permissions** page.
Zip	Displays the ZIP for a customer if provided as part of the address during user registration and is passed to Yodlee. This field can be made visible for a **Role** through the **Permissions** page.
Country	Displays the country for a customer if provided as part of the address during user registration and is passed to Yodlee. This field can be made visible for a **Role** through the **Permissions** page.
Email address	Displays the email address for a customer if provided as part of the user registration and is passed to Yodlee. This field can be made visible for a **Role** through the **Permissions** page.

4.4.2 Searching for a Customer or an Account

The user can search by a customer using any of the following search criteria:

- Username (GUID)
- Email address
- Name
- User's institution (Mem site account ID/Provider account ID)
- User's account type (Mem item ID)
- User's account (Mem item ID/Account ID)

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

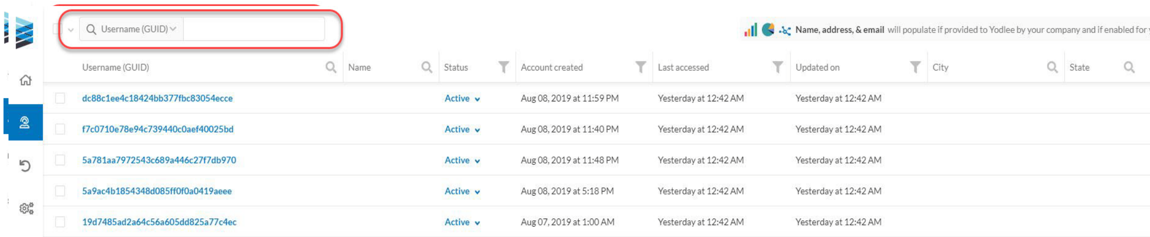


Fig. 4-26: Search by Customer field on the Customer Summary page

When searching for an account, the columns on the **Customers** page will change dynamically. The available columns when searching for an account include:

Table 4-11: Columns when searching by account

Fields	Description
User's ID (GUID)\ GUID - Globally Unique Identifier	User name link is displayed.
Site name	Displays the site name for an account
Account name	Displays the account name for an account
Account type	Displays the type of account
Verification status	Displays the most recent verification status for an account. This field is relevant for organizations utilizing the Verification product offering. If the account has been successfully verified, the status will show as **Success**. If the account has not been successfully verified, an appropriate error message will be shown.
Refresh status	Displays the latest refresh status for an account. If the account has been successfully refreshed, the status will show as **Success**. If the account has not been successfully refreshed, an appropriate error message will be shown.
Last successful refresh	Displays the timestamp of when the last successful refresh occurred.
History	Click **View History** will display Aggregation and/or Verification history for an account based on the last 40 refresh attempts *Figure 4-29*. Depending on which products are enabled, this page will show: • Aggregation History • Verification History • Balance Verification History • Document Download History
Balance	Displays the last known balance of an account. This field is not enabled for an organization by default. A customer can submit a request to enabled this field. Once enabled, visibility of the **Balance** field is controlled for by the administrator. The field can be made visible for a **Role** through the **Permissions** page.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 4-11: Columns when searching by account

Fields	Description
Account number	Displays the masked account number of an account.
Product enrolled	Displays the Products enrolled for the account.
Status	Displays the account status. The status can be: • Active • Inactive • Closed • Deleted
Mem item ID	Displays the Mem item ID for an account.
Last modified	Displays when the account was last modified.
Item account ID (Account ID)	Displays the Item account ID (Account ID) of an account.
Account created	Displays a timestamp showing when the account was created.
Transfer account ID	Displays the Transfer account ID for an account. This field is relevant for organizations utilizing the Verification product offering.
Routing number	Displays the routing number for an account. This field is relevant for organizations utilizing the Verification product offering.
Mem site account ID (Provider account ID)	Displays the Mem site account ID (Provider account ID) for an account.
Status	Click the funnel and select the options to display the status and click **OK**. The available options are: • Active • Suspended • Dormant
Country	Displays the country name.
State	Displays the state name.
City	Displays the city name.
Zip	Displays the ZIP code.
Account Created	Displays the date on which the account was created.
Last accessed	Displays the date on which the account was accessed.
Updated on	Displays the date on which the accounts were updated.

4.4.2.1 Viewing a Customer's Accounts

Clicking **Username (GUID)** opens a page displaying the customer's accounts. The same fields as listed in *Searching for a Customer or an Account on page 4-24* will be available on this page.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

The customer's summary information will be displayed in a grey banner across the top of the page. In addition to the customer details outlined in [Searching for a Customer or an Account on page 4-24], the Net Worth for a customer will be displayed in the summary banner. This field will display the net worth of a customer based on the combined account values (*Asset accounts minus liability accounts*).

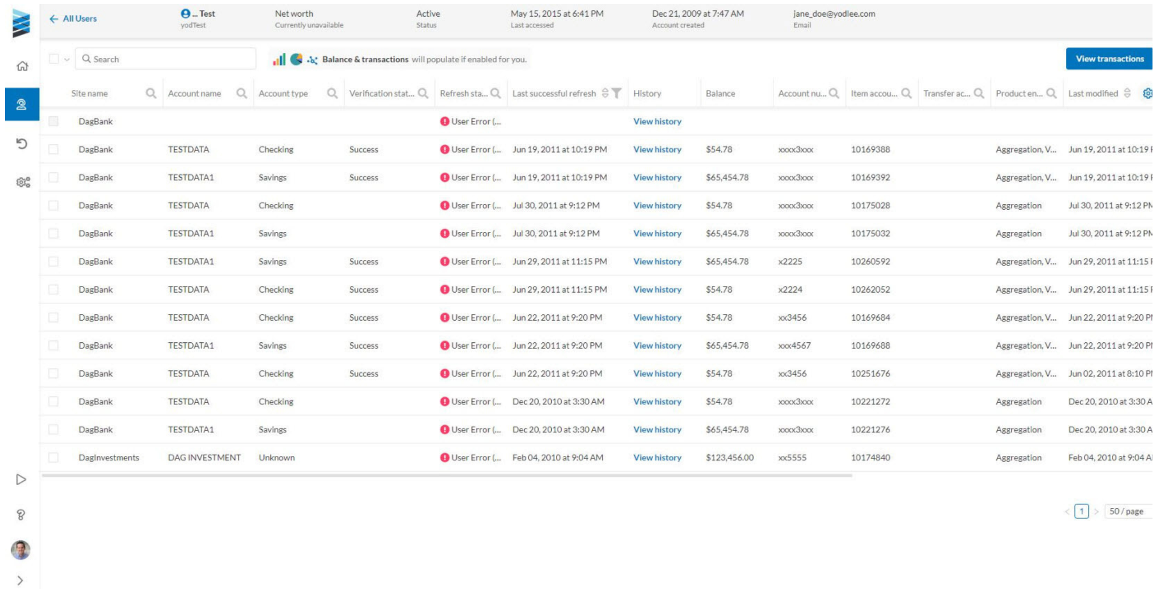
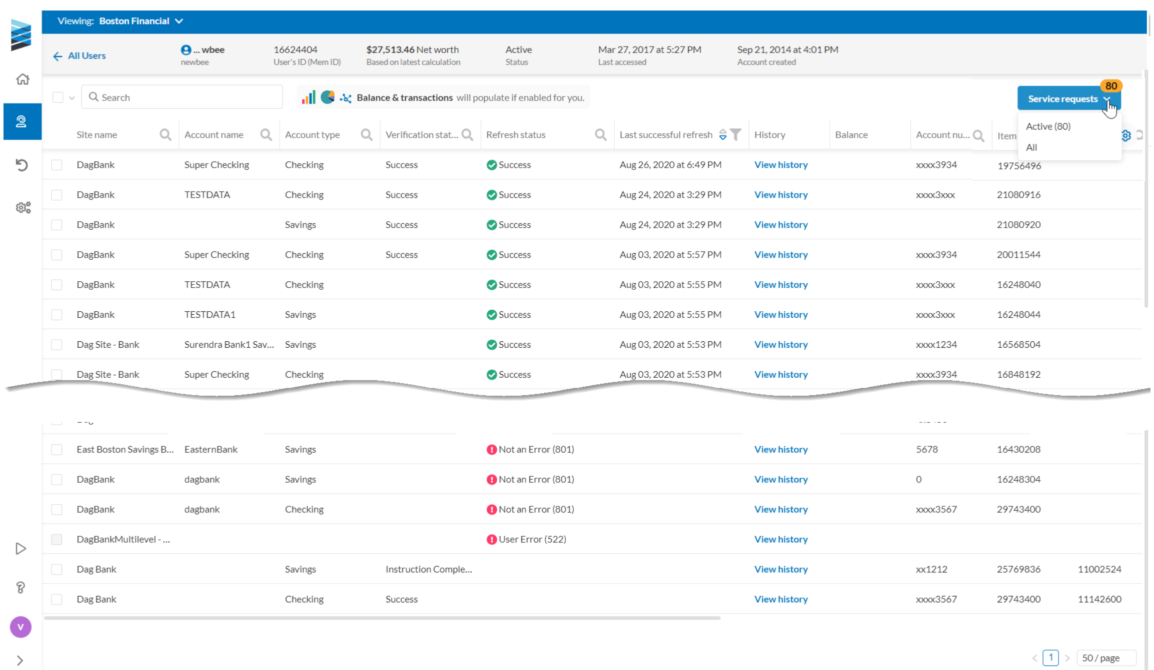


Fig. 4-27: A specific customer's details page displaying View transaction button



© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Fig. 4-28: A specific customer's details page displaying Service request button

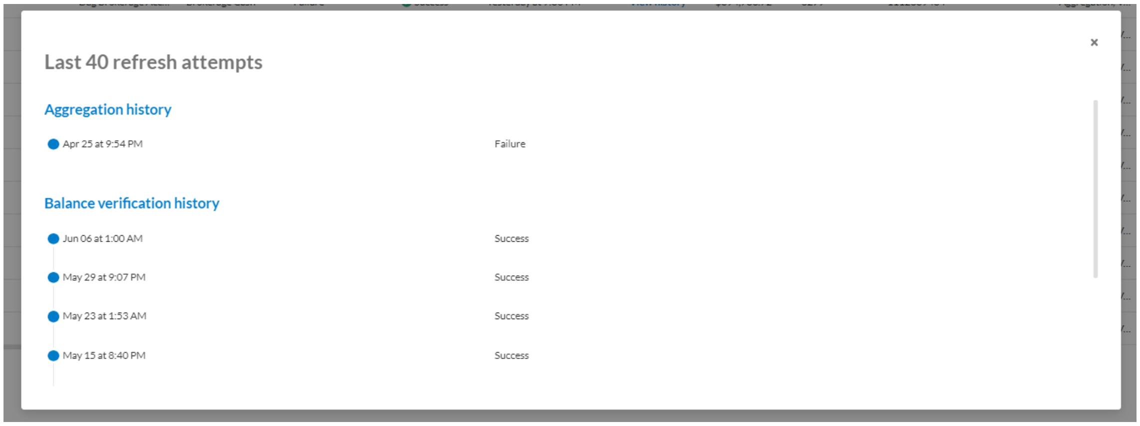


Fig. 4-29: Last 40 refresh attempts dialog box

4.4.3 Viewing Transactions

Transactions may be available based on which products are enabled for a customer. Clicking **View Transactions** will display transactions for a single account. Alternatively, from the **Customers** page (*Figure 4-31*), the user can also select a single customer to view transactions for all accounts of that customer. This is done by selecting the check box next to the Username (GUID) and selecting **View Transactions** from the multi-edit drop-down menu.

This page is not enabled for a customer by default. A customer can submit a request to enable this field. Once enabled, visibility of transactions is controlled by the administrator. The field can be made visible for a **Role** through the **Permissions** page.

Once enabled, transactions can be viewed in 30 day windows dating back to inception of the account.

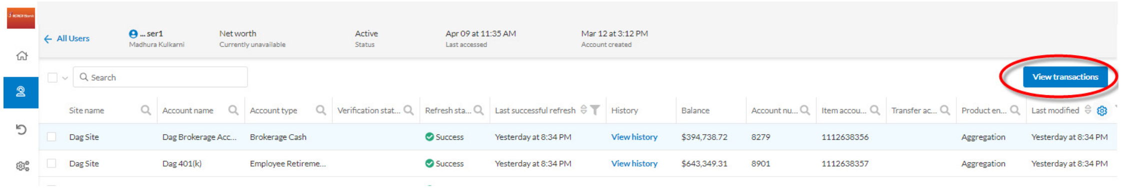


Fig. 4-30: Customer Details page displaying View Transaction button

The **View transaction** feature is available only if it is enabled. If this feature is enabled then the **Service requests** button is displayed to the left of **View transactions** button.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

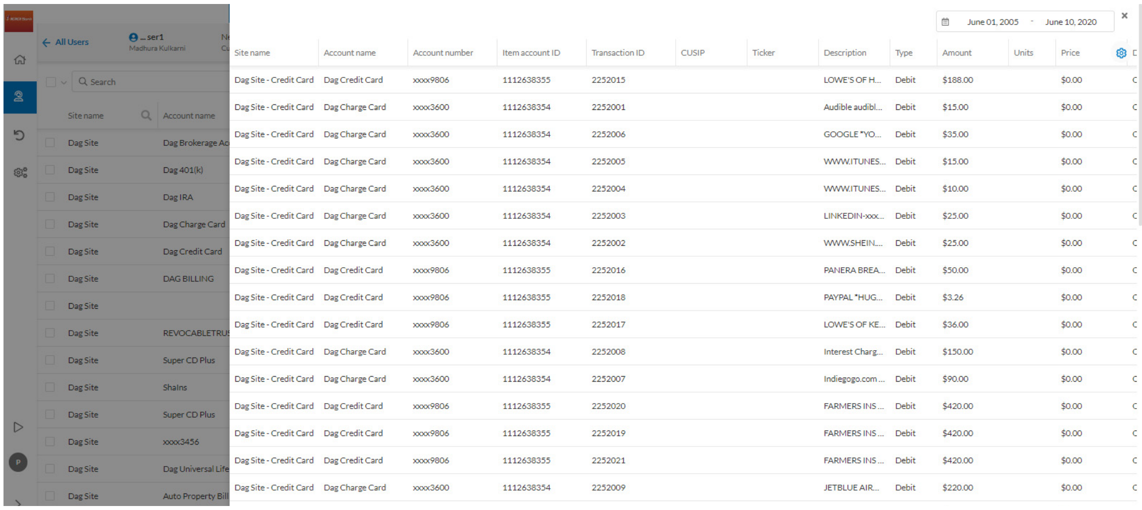


Fig. 4-31: The View transactions page

4.4.4 Viewing Service Requests on 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.

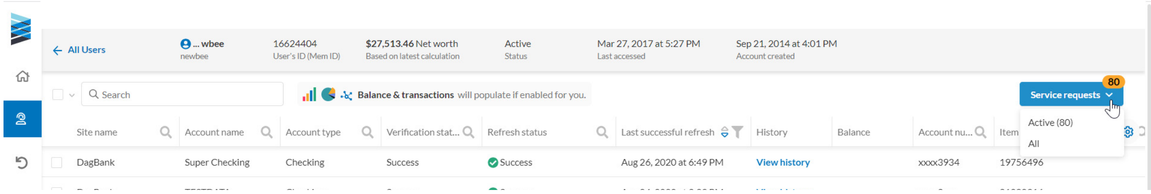


Fig. 4-32: Customer Details page displaying Service request button

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.

4.5 Status

The **Status** page displays maintenances and incidents specific to the **My Yodlee** application. The user can see historical, current, and upcoming events taking place on the My Yodlee platform. The status bar across the top of the page provides a quick reference to any active or ongoing events.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

The timeline view at the top of the page provides a view of any activity within a 14-day window based on the current date. The arrows on either side of the timeline allow the user to scroll forward or backward to see any events that fall inside of the 14 day window. The scroll feature is disabled if there are no events taking place within the 14-day window.

Hovering over an event, as well as clicking on the event in the timeline, provides additional details about that particular event. The additional details include:

- ID
- Environment Affected
- Service/Product Affected
- Impact
- Status

The table below displays more historical information about incidents and maintenances. The table includes the event's ID, Type, Start date, End date, and Status.

The user can search for an event by the event ID. The table information can be exported.

Maintenances - Planned events

Incidents - Unplanned events

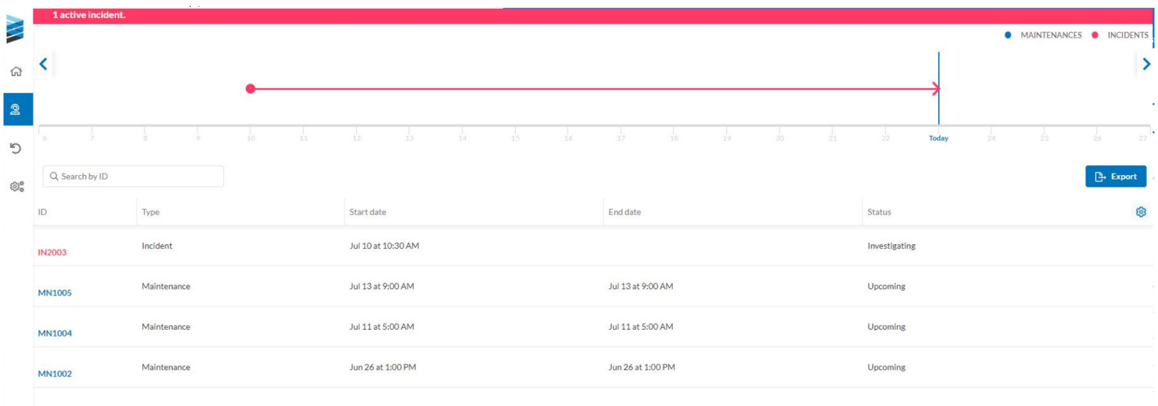
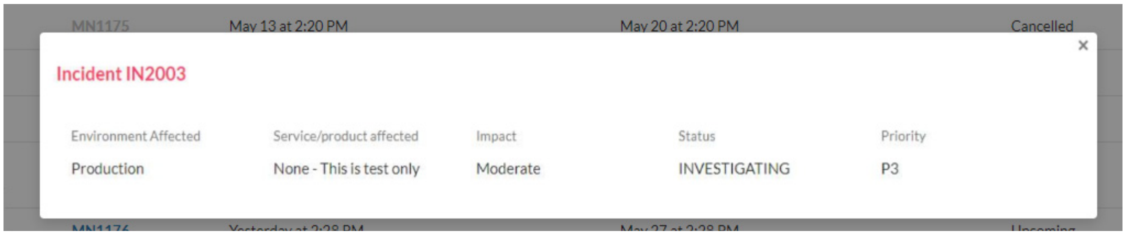


Fig. 4-33: The Status page

When a customer clicks **Incident** or **Maintenance** link on the Status page the following dialog boxes are displayed.



© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Fig. 4-34: Incidents dialog box

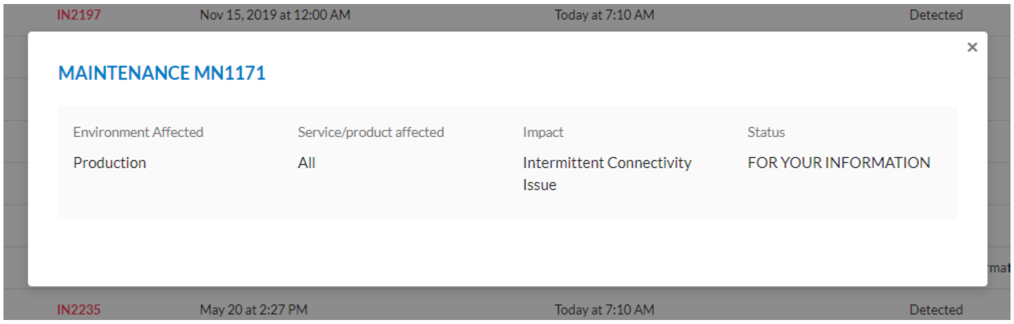


Fig. 4-35: Maintenance dialog box

The user can select the settings list on the **Status** page to view the selected columns on the **Status** page.

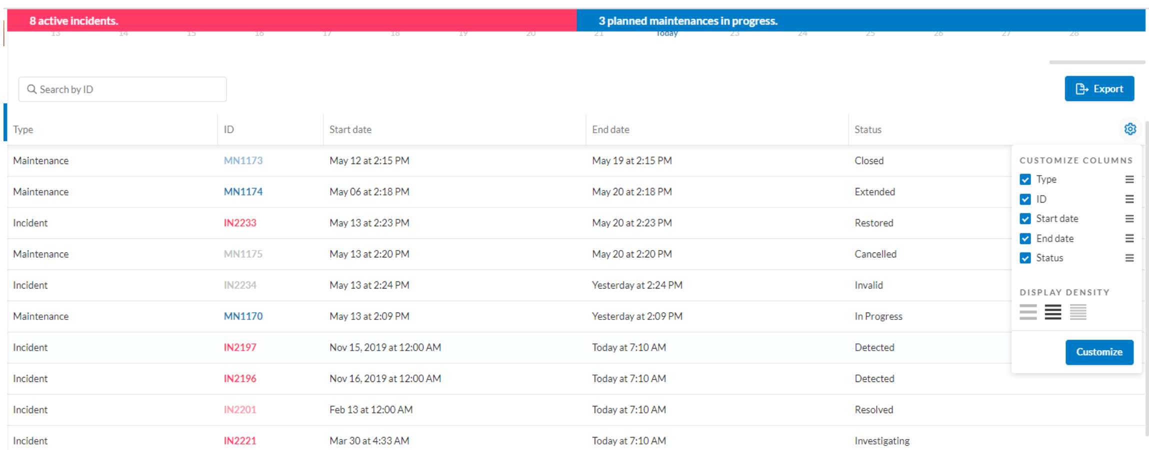


Fig. 4-36: The status page settings list

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 5: Classic

5.1 Introduction

Any features or functionality not found in the **My Yodlee** experience but are still required for customer support or other use cases can be found under the **Classic** option in the menu. Clicking the **Classic** menu option will open a new tab with any pages carried forward from the Yodlee CustomerCare (YCC) experience that are enabled for the user. If the user is not enabled to see any pages found via the **Classic** option, then this icon will not be listed in the menu.

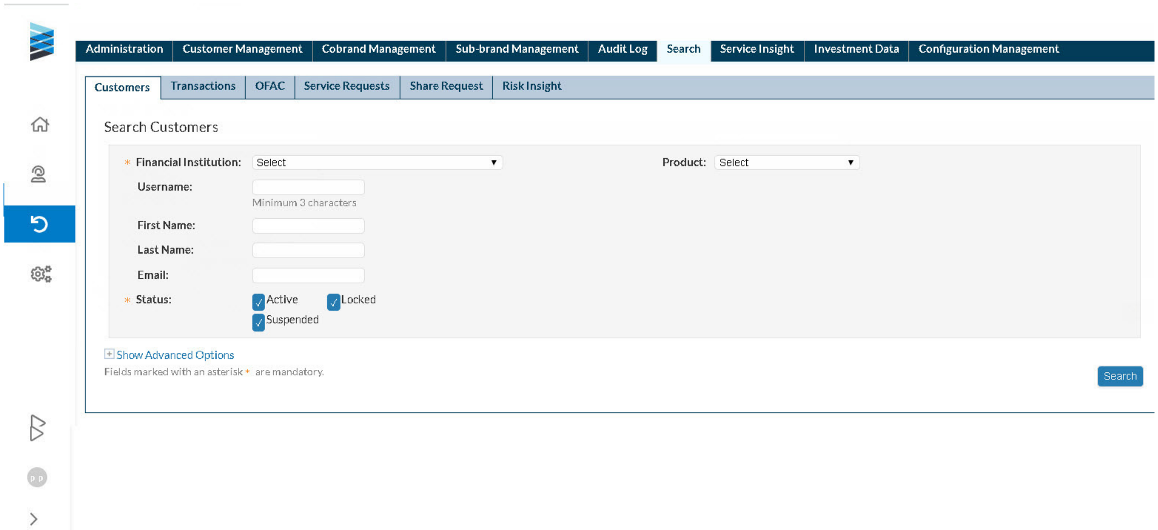


Fig. 5-1: The Classic page displaying the modules

The pages, features, and functionality found in the **Classic** section are controlled by access-control lists (ACL) found under the **Administration** page in the **Classic** section. Depending on the level of access granted in the **Administration** page, the following pages (and associated sub-pages) will appear in the **Classic** section:

- Administration
- Sub-brand Management
- Search
- Service Insights
- Investment Data
- Configuration
- Customer Management

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 6: Settings

6.1 Introduction

The **Settings** section of the menu contains two different pages:

- Permissions
- System Settings.

These two areas of the application are designed to provide My Yodlee users with dedicated pages to streamline and simplify user registration, permission management, and system settings configuration within the **My Yodlee** experience.

NOTE: The **System Settings** page is available only to My Yodlee users assigned to the **Administrator** role. The **Permissions** page is accessible based on a user's role and associated permissions.

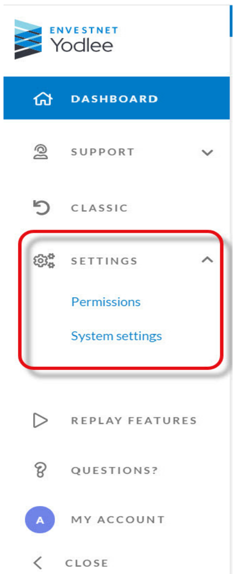


Fig. 6-1: Settings list

6.2 Permissions

Clicking **Permissions** in the left navigation menu will open the **Permissions** page and the list of all registered My Yodlee users are displayed.

The access to the **Permission** page is controlled via Permissions.

To view Permissions page

1. Click **Settings**.

   The list under **Settings** is displayed (*Figure 6-1*).

2. Click **Permissions**.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

The **Permission**s page is displayed (*Figure 6-2*).

3. Select the page to be viewed from the blue bar drop-down list. For more information about blue label, refer to *Customer Selection - Blue Bar on page 7-5*.

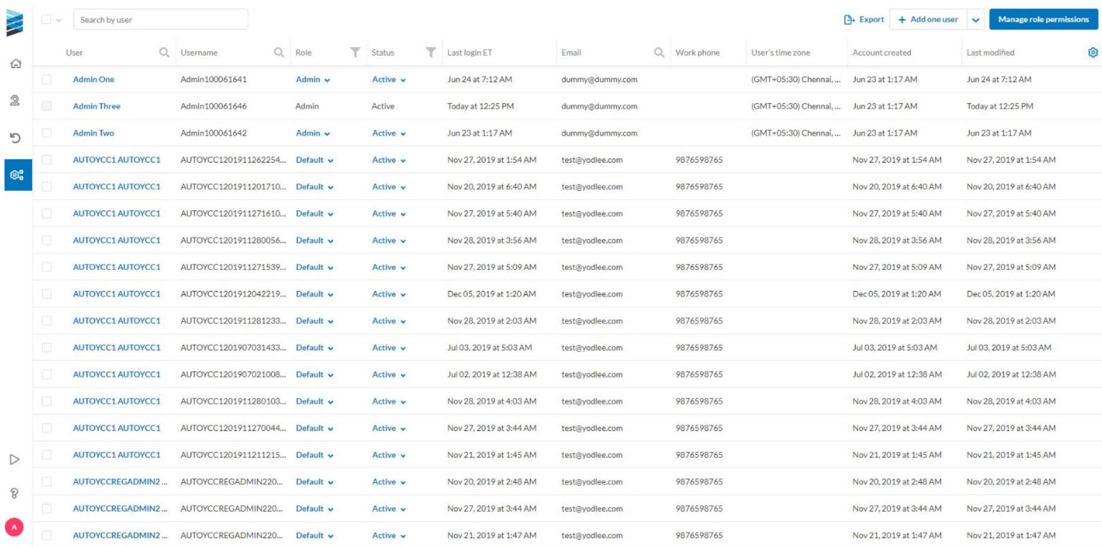


Fig. 6-2: The Permissions page

Table 6-1: Field description on Permission page

Field	Description
User	Displays the name of a user as a link. The link is used to edit the user's information. For more information, see *Editing User Details on page 6-3*
Username	Displays the username assigned to a user.
Role	The customer has the option to change the role of a user if that permission has been granted. The default roles created by Yodlee are: • Admin • Default Each customer can create additional roles based on their organizational needs.
Status	The customer has the option to change the status of a user if that permission has been granted. The available options are: • Active • Delete • Suspend
Last Login ET	Displays the last date and time the customer had logged in.
Email	Displays the email assigned to the user.
Work phone	Displays the phone number assigned to a user.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 6-1: Field description on Permission page

Field	Description
User’s time zone	Displays the time zone the user has chosen.
Account Created	Displays the date and time the account was created on.
Last Modified	Displays the date and time the account was last edited.

6.2.1 Editing User Details

On the **Permissions** page, clicking the user link under the user column displays the **Edit User** dialog box.

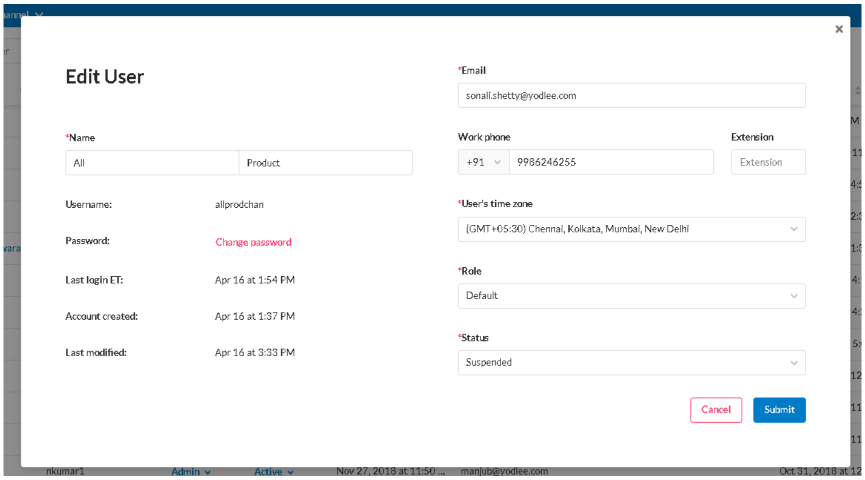


Fig. 6-3: Edit User dialog box

Table 6-2: Edit User dialog box fields

Field	Description
Name	Displays the user’s name The customer can edit the user name.
Username	Displays the username assigned to a user.
Password	Changing the password on the **Edit User** page is designed for an administrator to reset the password for a user. The administrator can create a temporary password for another user using this workflow. For more information, see *Changing the User’s Password on page 6-4*
Last login ET	Displays the last date and time the customer had logged in.
Account Created	Displays the date and time the account was created..
Last Modified	Displays the date and time the account was last edited.
Email	Displays the email assigned to the user. The customer can edit the email address.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 6-2: Edit User dialog box fields

Field	Description
Work phone	Displays the phone number assigned to a user. The customer can edit the phone number and the extension
User’s time zone	Displays the time zone the user has chosen. The customer can edit the time zone.
Role	The customer has the option to change the role of a user if that permission has been granted. The default roles created by Yodlee are: • Admin • Default Each customer can create additional roles based on their organizational needs.
Status	The customer has the option to change the status of a user if that permission has been granted. The available options are: • Active • Delete • Suspend

6.2.2 Changing the User’s Password

The customer can change the password of the user by accessing the **Edit User** dialog box. For more information about the **Edit User** dialog box, see *Editing User Details on page 6-3*.

On the **Edit User** dialog box clicking the **Change password** will display the **Change password** dialog box. The customer can type the new password in the **Password** and **Confirm Password** fields and submit. the password will be updated successfully.

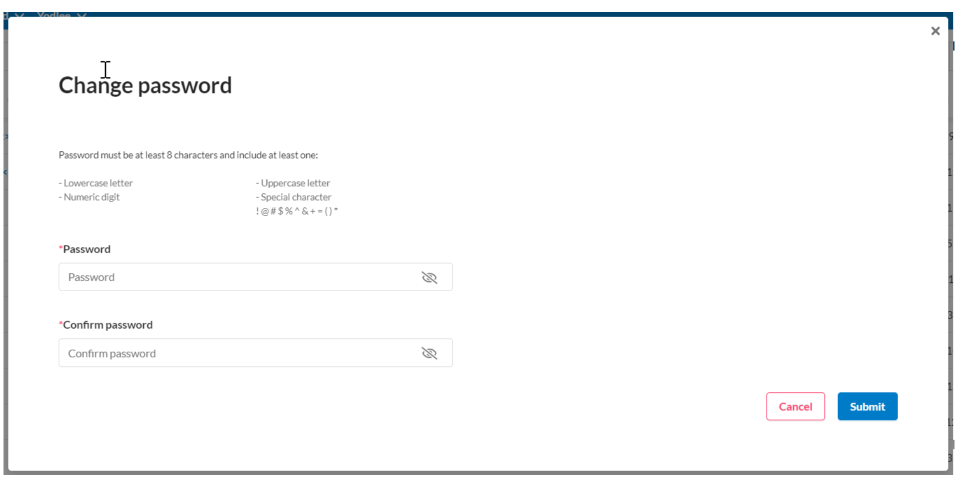


Fig. 6-4: Change Password dialog box

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

NOTE: Changing the password using this workflow is designed to provide a user who is locked out of their account with a temporary password. The user will be asked to replace this temporary password with new password during the next login attempt. A user who wants to change their own password should use the **Change Password** workflow found on the **My Account** page.

6.2.3 Changing the Status of a User

If a user has the permission to the edit the status of another user, they can select the status of the user by clicking the status next to a user and changing it via the drop-down list. The available status options are **Active**, **Delete**, and **Suspend**.

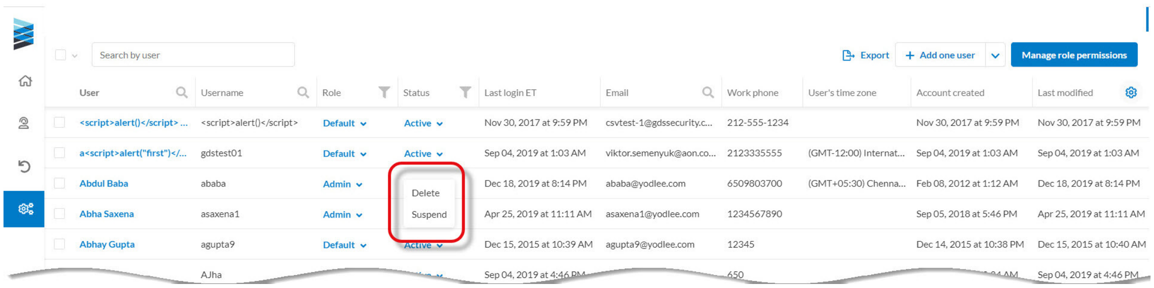


Fig. 6-5: The status drop down to select the user's status

6.2.4 Changing the Role of a User

If a user has the permission to change the role of another user, they can select the role of the user by clicking the role next to a user and changing it via the drop-down list. In addition to **Admin** and **Default**, any other roles created by the customer will be available in the drop-down list.

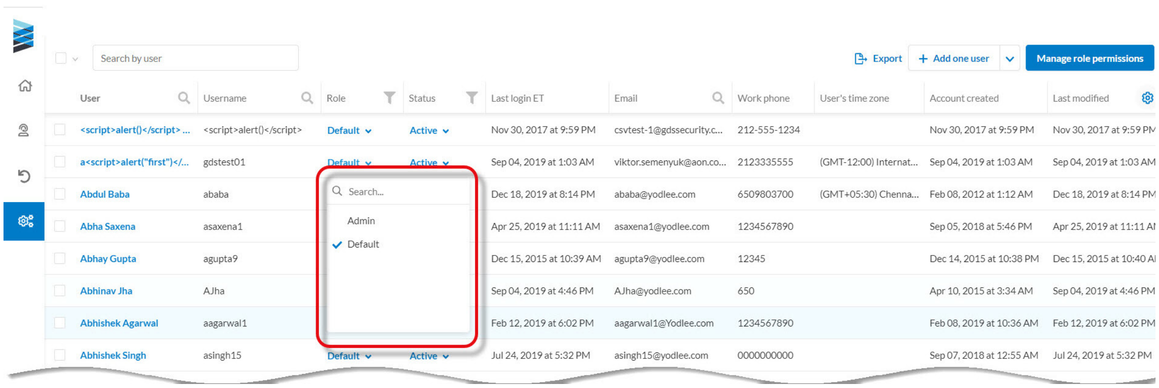


Fig. 6-6: The role drop-down to select the user's role

6.2.5 Adding a User

By using **+Add one user**, customer can register a user.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

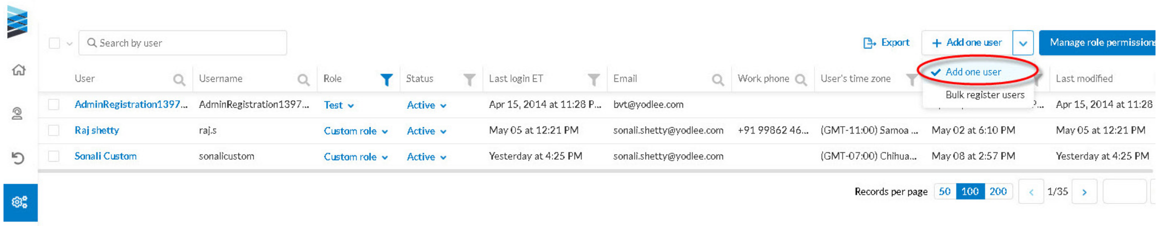


Fig. 6-7: Adding a user

On clicking **+Add One User**, the **Register User** dialog box is displayed to enter all the details of the user and click **Submit**.

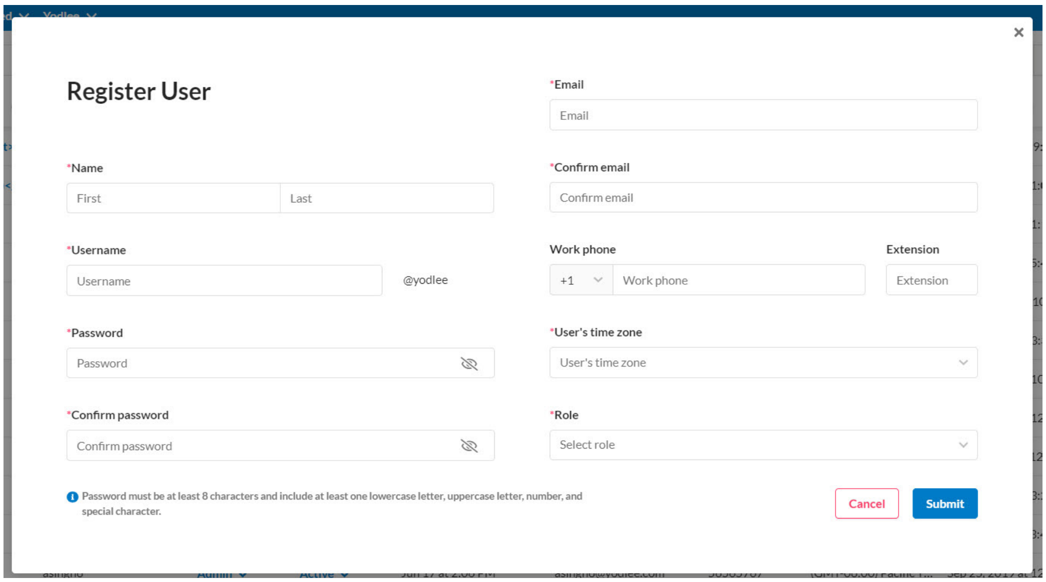


Fig. 6-8: The Register User dialog box

Table 6-3: Field description on Register User dialog box

Field	Description
Name	Enter the First name and Last name of a user.
Username	Enter the username to assign to the user.
Password	Enter a password to assign to a user.
Confirm Password	Enter the same password entered in the **Password** field.
Email	Enter the email assigned to a user.
Confirm email	Enter the same email address provided in the email field.
Work phone	Enter the phone number and extension number.
User's time zone	Select the time zone.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 6-3: Field description on Register User dialog box

Field	Description
Role	Select the role for the user. The available options are: • Admin • Default

6.2.6 Adding Users in Bulk

The customer can add bulk-register users. Bulk registration provides an XLS/CSV file to upload user details in bulk for registration. The file will contain the required fields for bulk registering users.

An error message will be displayed if any users in the file are not successfully uploaded.

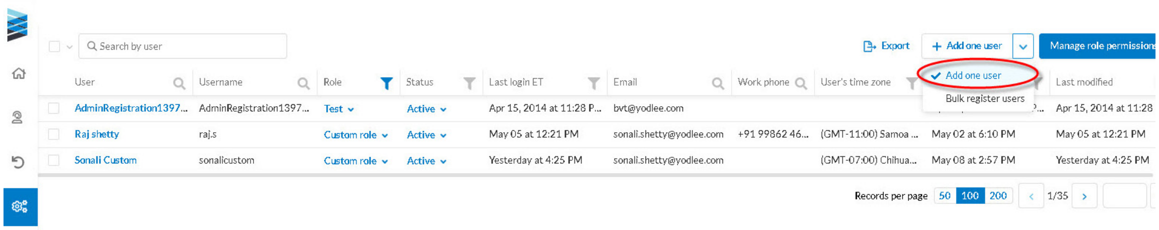


Fig. 6-9: The Bulk register user in the drop-down list

To add users in bulk using bulk registration workflow

1. On the **Permissions** page, select **+Bulk Register User** from the drop-down list.

   The **Drag and Drop or browse** dialog box is displayed.

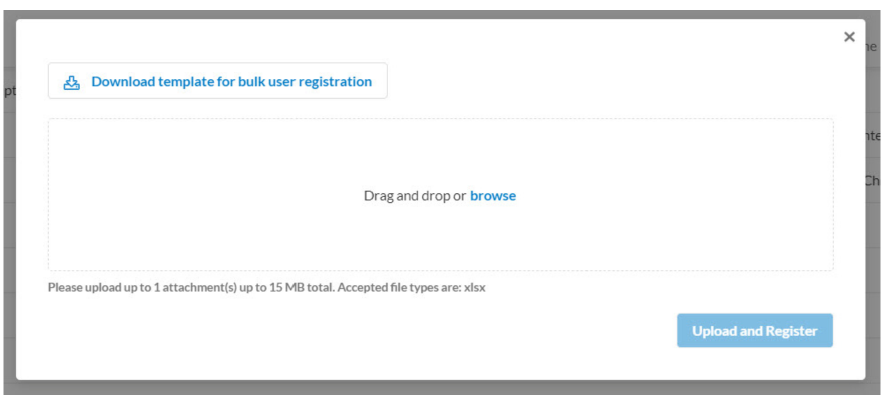


Fig. 6-10: Window to upload the bulk user registration template

2. Click **Download template for bulk user registration**.

   The template is downloaded to the local drive.

3. Provide the required details in the template. Save and close the template.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

4. Drag and drop the saved template to the dialog box or click browse on the dialog box to select the location of the template.
5. Click **Upload and Register**.

6.2.7 Managing Role Permissions

On the **Permissions** page, the customer can use the **Manage Role Permission** feature to add new role, duplicate a selected role, and delete the selected role.

To open manage role permission page

1. Click **Support**.

   The **Support** menu is displayed.
2. Click **Settings**.

   The **Settings** page is displayed.
3. Click **Manage Role Permission**.

   The **Manage Role Permission** page is displayed.

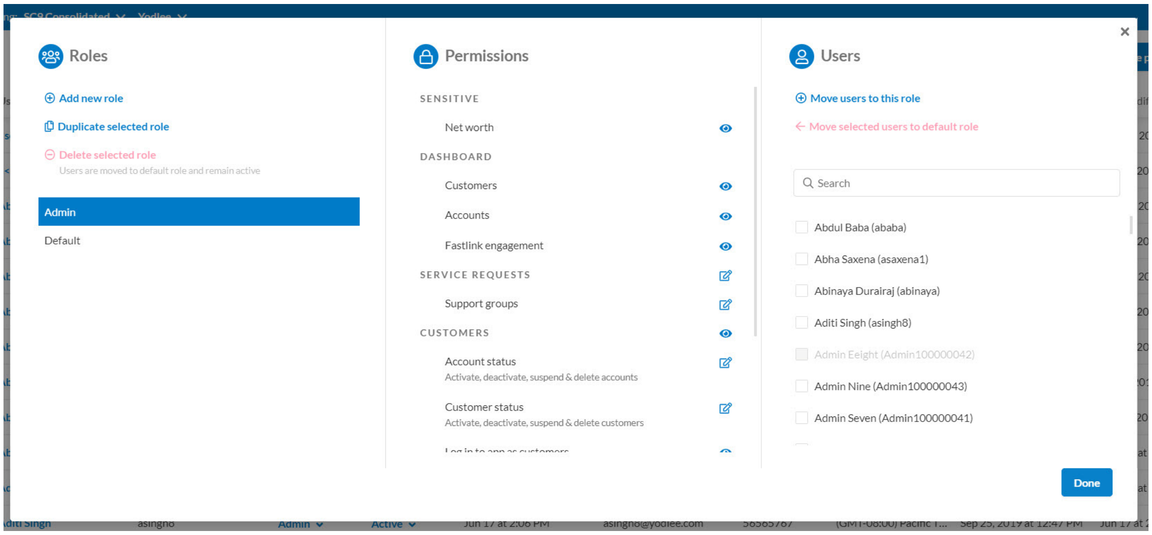


Fig. 6-11: Managing Role Permission page

6.2.7.1 Roles

The left side of the dialog box is where roles are managed. Roles are defined by a collection of permissions. Roles can be created to give each organization the flexibility they need to grant and manage access to My Yodlee for different use cases.

Under Roles there are three functionalities:

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

6.2.7.1.1 Add New Role

Clicking **Add new role** creates a new role, highlighted in blue. Clicking the **Edit** icon allows the role to be renamed to something unique.

By default, the available permissions to configure for a new role are the same as the role assigned to the user performing the action. For example, the administrator will see all permissions available for configuration when creating a new role. A user assigned to a role allowing them to create new roles but having comparatively fewer permissions than the administrator will only see their role's permissions in the list on adding a new role.

By default, every organization starts with two roles:

- **Admin** - The administrator for an organization is responsible for controlling their organization's My Yodlee experience through role & permission management, system settings, user registration, etc. By default, the Administrator role is given full permission to all the functionality inside My Yodlee. The Admin role cannot be deleted and there must be at least 1 user assigned to the Admin role at all times.
- **Default** - This is a role with basic functionality to view and edit select customer details, create tiles on the Dashboard file service requests. The **Default** role comes with predefined permissions; however, the Administrator for an organization can change the permissions of the **Default** role any time after the on-boarding process. The **Default** role cannot be deleted.

6.2.7.1.2 Duplicate selected role

Duplicating the selected role will create a new role with identical permissions to the currently selected role. This allows the user to easily isolate and change one permission while creating an entirely new role.

6.2.7.1.3 Delete selected role

Deleting the selected role will delete the role and move any users assigned to that role to the **Default** role.

6.2.7.2 Permissions

The middle section of the pop-up window is where Permissions are configured for different roles, Permissions define the pages, features and functionality available to users assigned to a particular role.

The page-level permissions, where applicable, control access to a particular page in My Yodlee. For example, if the Service Request page permission is set to Hide for a role, the Service request page will be hidden and inaccessible to users in that role.

Other permissions pertain to features or functionality found in the My Yodlee application. For example, the Create User permission can be hidden for a role, disabling that function in My Yodlee. Alternatively, the Create User permission can be set to Edit, enabling that role to create new users in My Yodlee.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Permissions can have up to 3 possible settings:

- **Hide** - A permission set to Hide means that particular page, feature, or functionality is hidden for a role.
- **View** - A permission set to View means that particular page, feature, or functionality is visible inside of My Yodlee but is not actionable for a role.
- **Edit** - A permission set to Edit means that particular page, feature, or functionality is visible inside of My Yodlee and can be edited/is actionable for a role.

Select Permissions are controlled by Yodlee. Transactions and Balance can be turned on or turned off for an organization depending on their preferences. If they are disabled or turned off, no transaction or balance information will be available to a user in My Yodlee. If they are enabled or turned on, the permission to access transaction and balance information will be turned on for the organization's Administrator only. The Administrator can then allow these details to be visible for users assigned to other roles at their discretion.

Please contact the Yodlee Client Services team for help managing the ACLs associated with pages found under the **Classic** tab. For more information, see *Introduction on page 5-1*.

NOTE:

- Control of pages found under the **Classic** tab will still be controlled by legacy ACLs carried forward from the Yodlee CustomerCare tool (YCC). These can be controlled under the **Administration** tab.
- Yodlee Administrators can enable Transactions and Balance Permissions by selecting **All Customers** from the **blue bar** drop-down list. For more information about blue bar, refer to *Customer Selection - Blue Bar on page 7-5*

Table 6-4: List of My Yodlee Permissions

Field	Description
Holder Details	Enables or disables the sub-permissions within Holder details
Name	Sub-permission of holder details. Display or Hide the name of customers. This information will only populate if captured during user registration and passed to Yodlee.
Address	Sub-permission of holder details. Display or Hide the address details for a customer (City, State, ZIP, and Country). This information will only populate if captured during user registration and passed to Yodlee.
Email address	Sub-permission of holder details. Display or Hide the email address of customers. These details will only populate if captured during user registration and passed to Yodlee.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 6-4: List of My Yodlee Permissions

Field	Description
Transactions	Displays transaction information for a customer or customer's accounts. This permission must be enabled by Yodlee for an organization before it will appear in the list of permissions for the Administrator.
Balance	Displays the account balance for a customer's account. This permission must be enabled by Yodlee for an organization before it will appear in the list of permissions for the Administrator.
Net worth	Displays the net worth for a customer. Assets minus Liabilities based on account type.
Customers	Displays the Customers tile on the Dashboard.
FastLink Engagement	Displays the Engagement reports on the Dashboard. Only available for customers using the latest version of FastLink.
Service Requests (Page)	Enables the Service requests page and sub-permissions Hide means the page is entirely hidden. View means the page and SR details can be viewed but no service requests can be created or edited. Edit means all of the functionality on the Service request page is available and editable.
Support groups	Support groups are displayed by default. Edit means Support groups can be created or edited.
Customers (Page)	Enables the Customers page and sub-permissions.
Log in to app as customer	Enables a user to log in to an application on-behalf-of a customer to troubleshoot. This is a feature which must be enabled for an organization by Yodlee.
Customer status	Status of a customer is always visible if the page is available. Edit means the status of a customer can be changed.
Account status	Status of an account is always visible if the page is visible. Edit means the status of a customer's account can be changed.
My Yodlee User	Management (Page) - Enables the Permissions page. Hide means the page is not visible.
Manage Permissions	Enables the ability to manage permissions, create roles and assign users to roles. Hide means this functionality is hidden from the page. Edit means roles, permissions and user assignment can be managed.
Create user	Enables the ability to register new users (single or bulk). Hide means this functionality is hidden from the Permissions page. Edit means new users can be created.
Manage user	Enables the ability to manage My Yodlee users and their status. Users can always be viewed in the My Yodlee application. Edit means a user can change the status or profile of another My Yodlee user.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

6.2.7.3 Users

The list of all active users is displayed on the right side of the dialog box. Once Roles and associated Permissions have been defined, users can be added to roles and inherit the privileges given to their assigned role.

To assign a user to a role, first select the role to highlight it in blue. Once selected, navigate to the **Users** section and select one or more users using the check boxes to assign to the preselected role. Click **Move users to this role** to assign the selected users to the preselected role.

User can be moved quickly to the **Default** role. One or more user can be selected using the check box and click **Move selected users to default role**.

6.3 System Settings

The **System Settings** page allows configuration of various system settings for an organization. Users who have access to the **System Settings** page can configure settings such as:

- Session time out
- Auto close resolved service requests
- Password expiration
- Password expiration notification
- Deactivate user due to inactivity.

NOTE: This page is available only to users assigned to the **Administrator** role in My Yodlee.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

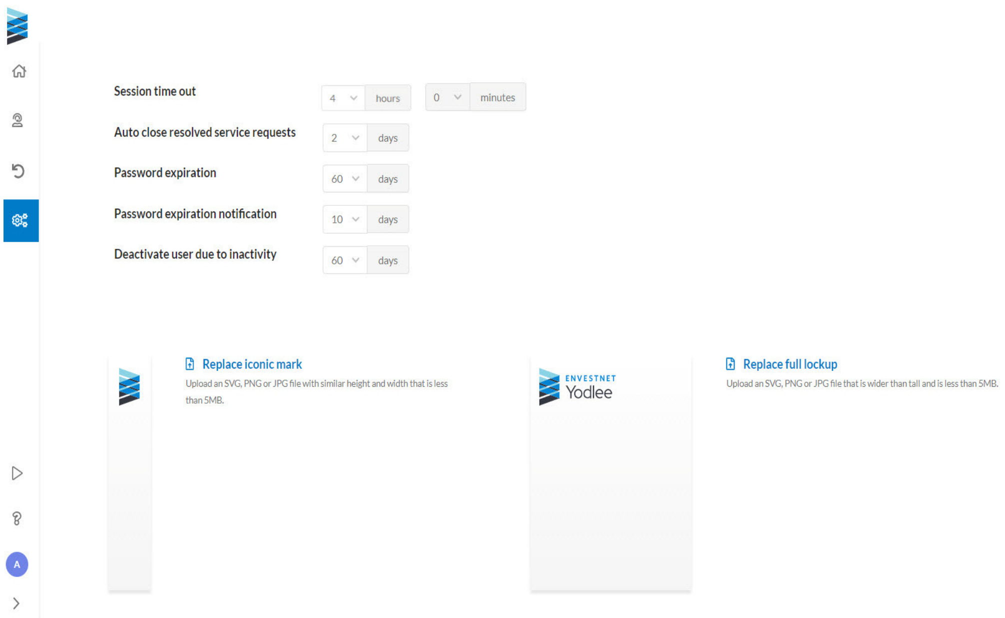


Fig. 6-12: System setting page

The user can change iconic marks and full lockups to customize based on their preferences.

Clicking **Replace iconic mark** or **Replace full lockup** renders a dialog box where either an iconic mark or full lockup can be uploaded to **My Yodlee**. Acceptable file types are described in the dialog box.

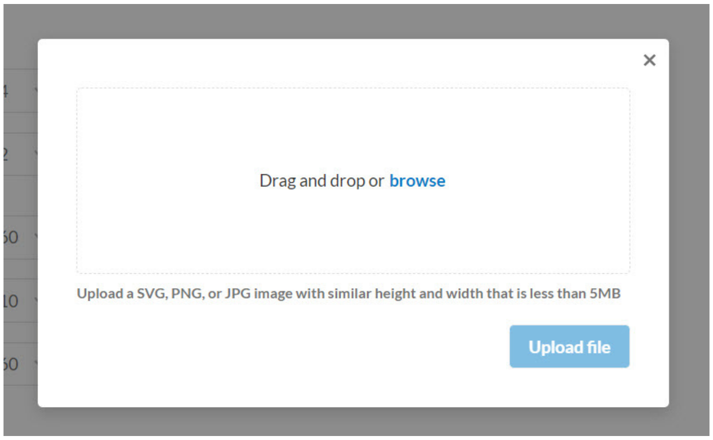


Fig. 6-13: Drag and Drop dialog box

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 7: My Account

7.1 Introduction

The **My Account** page is available to all registered **My Yodlee** users. This page allows a user to edit their profile and customize their individual settings within the application.

7.2 My Account

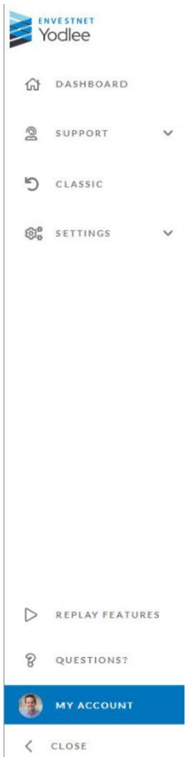


Fig. 7-1: My Account on menu

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

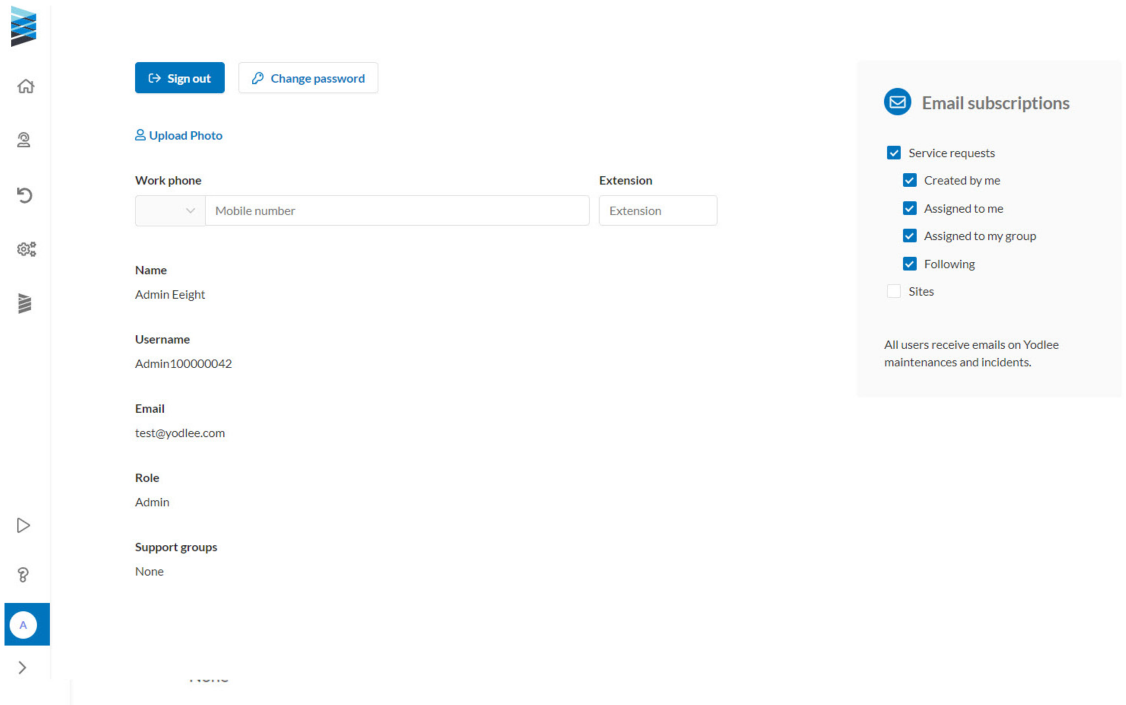


Fig. 7-2: My Account page

NOTE: Changes are saved and applied automatically

Table 7-1: Field description for My Account page

Field	Description
Name	Displays the name of the user.
Email	Displays the email address of the user.
Work Phone	Select the country code number for the phone number from the drop-down list. Enter the phone number and the extension.
Role	Displays the role of the user
Support groups	Displays the support group to which the user belongs.
Photo	Displays the user's photo if one has been uploaded. An icon with the user's initials is the default object in this field.
Change password	My Yodlee user can change their password. After successfully updating a password, the new password will be required at the next login attempt.
Logout	Clicking Logout will log a user out of the **My Yodlee** application.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Table 7-1: Field description for My Account page

Field	Description
Email subscriptions	Email subscription preferences allow a user to opt-in or opt-out of email alerts pertaining to Service requests or Site alerts. By selecting a check box next to one or all of the available options, the user will receive email alerts for service requests if they meet the listed criteria. Site alerts will only be shared via email for sites which are enabled for an organization. Opting in for Sites under email subscription will allow site alerts to be sent via email.

7.2.1 Uploading a Photo

The user can upload their own photo to replace the default icon. The photo can be uploaded or removed at any time.

To upload a profile photo

1. On the **My Yodlee** home page, click the **My Accounts** tab.

   The **My Account** page is displayed.

2. Click **Upload Photo**.

   The dialog box to upload the photo is displayed.

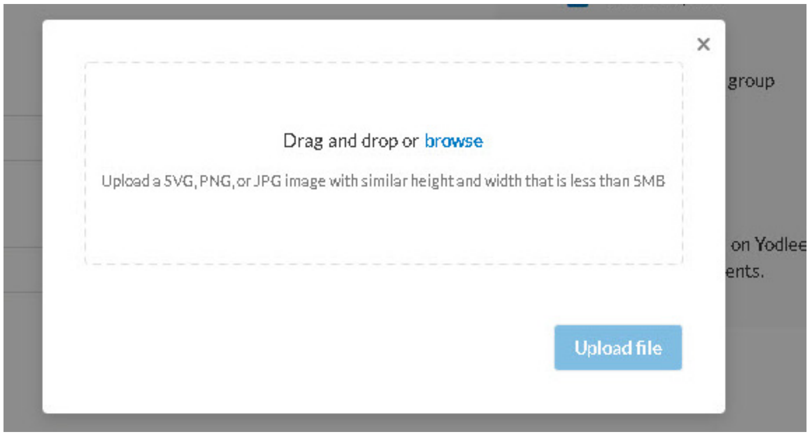


Fig. 7-3: Upload photo dialog box

3. Drag and drop or upload a photo on the **photo uploading** dialog box from a local drive that meets the criteria defined in the dialog box.

   Once the photo is selected, the **Upload File** dialog box is displayed for confirmation.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Fig. 7-4: The Upload file dialog box

4. Click **Upload file**.

   The profile photo is displayed on the **My Accounts** page.

7.2.2 Deleting a Photo

The user can delete the existing profile photo.

To delete a Profile photo

1. On the **My Yodlee** home page, click the **My Accounts** tab.

   The **My Account** page is displayed.

2. Click **Delete Photo**.

   The photo is deleted.

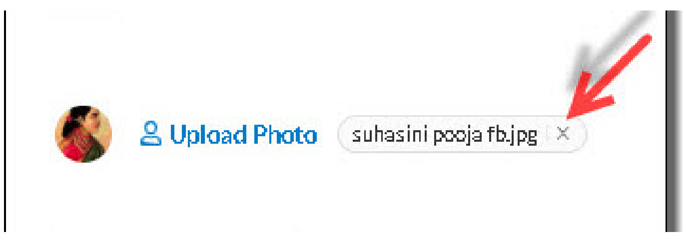


Fig. 7-5: Delete the photo

7.2.3 Changing the Password

The user can change their **My Yodlee** password at any point in time from the **My Account** page. This functionality is only found on the **My Account** page.

To change the password

1. Click **My Account** or the **My Account** icon in the left navigation menu.

   The **My Account** page is displayed.

2. Click **Change Password**.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

The **Change password** dialog box is displayed.

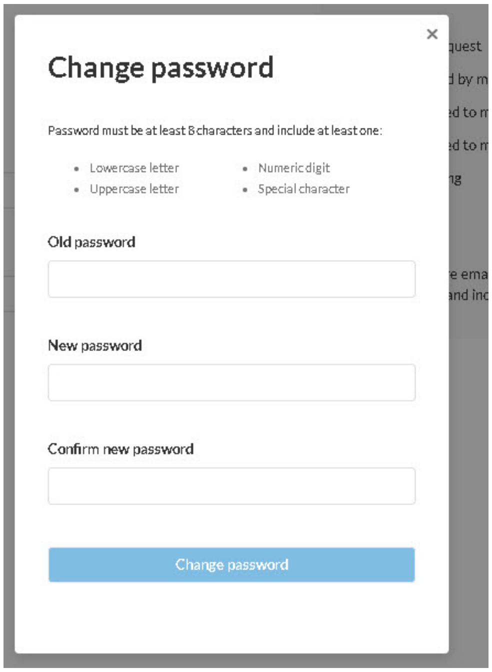


Fig. 7-6: Change password dialog box

3. Enter the current password in the **Old Password** field, enter the new password in the **New password** and **Confirm new password** fields.
4. Click **Change password**.

   The password for a user will be automatically updated and will be the required password during the next login attempt.

7.2.4 Signing out of the Application

The **Sign out** feature is available only on the **My Accounts** page. This feature allows the customer to sign out from the application. To sign out of My Yodlee, navigate to the **My Account** page and click **Sign out**.

7.3 Customer Selection - Blue Bar

For Channel Partners and Yodlee users, a blue bar is available across the top of several pages in the My Yodlee experience.

In the case of the Channel Partner, the blue bar displays a list of sub-brands belonging to that Channel Partner. Using the list found in the blue bar, a Channel Partner user can toggle between different sub-brands on several of the pages in the My Yodlee application in order to view data, manage permissions, file service requests, etc. If you are a Channel Partner and need additional support with these workflows, please contact your Yodlee Client Services team for additional assistance.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

In the case of a Yodlee user, the blue bar displays a list of all data centers and associated customers.

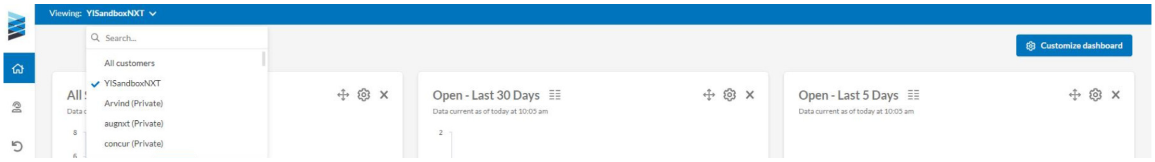


Fig. 7-7: Customer selection blue bar

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

Chapter 8: Glossary

8.1 Account

An account represents a logical set of collected data (at minimum, a name) that corresponds to a real-world account in the way that users generally think of them. (Prior to 7.0, this was referred to as an "Item Account"- an account can be either online, where information is automatically collected via scraping, data feed, or a similar online mechanism; or can be manual, where the user enters information. A site can encompass multiple accounts, such as: Site = Citibank Online Bank associated accounts:

- Joe's Citibank Checking 1
- Joe's Citibank Checking 2
- Joe's Citibank Credit Card

An account by default is already enabled for data presentment, and may be enabled for additional activity types if support is available.

8.2 Account Status

The status of an account indicates its relevance to the application. Possible states include "valid, closed, and removed." An account status may affect things such as an account's eligibility for refresh, its inclusion in calculated fields, its display in certain views, and more.

8.3 Application

Any software application built on top of the Envestnet | Yodlee Platform using published and supported APIs.

8.4 Closed Account

An account state that indicates the account is effectively frozen in the Envestnet | Yodlee applications. Closed accounts are generally still visible in the application but are not eligible for data updates and are not included in present or future net worth calculations. Closed accounts can be reopened or marked as valid by users.

8.5 Cobrand

A cobrand is a namespace exclusively associated with one customer. It may contain a set of unique members and is associated with one or more applications.

8.6 Container

A container defines aggregated data, for example:

- Email
- Banking

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

- Credit Card

Containers can contain child containers or sub-containers that further define aggregated data, for example:

- Holdings
- Transactions
- Statement

8.7 Content Service (Sum Info ID)

A content service represents a relationship between a container and a specific site. Each content service corresponds to exactly one site. Multiple content services can exist for a given site. An exception is a custom service with data manually entered by a user. These are also considered content services even though they do not have a 1:1 relationship with a site.

For example:

- Yahoo Email (Site = Yahoo, Container = Email)
- Yahoo Calendar (Site = Yahoo, Container = Calendar)
- Citibank Banking (Site = Citibank, Container = Banking)
- Citibank Credit Card (Site = Citibank, Container = Credit Card)

8.8 Credentials

Credentials represent any permutation of usernames, passwords, and other information required to authenticate a user.

8.9 Customer Service Representative

A customer service representative (CSR) is the Tier 1 personnel from a customer's support team.

8.10 Data Agent (Agent)

An Envestnet | Yodlee Agent is a software component within the gatherer that collects data from one or several content services. The method of collection may be via any number of standards-based or proprietary direct data feeds such as HTML, OFX, IFX, XML, and YML. Envestnet | Yodlee Agents can be initiated on demand by applications or by the refresh scheduler.

8.11 Data Aggregation

Data aggregation is the technology that gathers, augments, and consolidates data from users' personal accounts into a common, normalized database.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

8.12 Gatherer

The gatherer is the component in the Envestnet | Yodlee Data Engine that collects data from Envestnet | Yodlee supported sites.

8.13 Refresh

A refresh is the act of updating aggregated data for one, or a set of item accounts, to obtain the most recent data available. Refresh requests may originate from either an explicit request during a user session (for user or application- initiated refreshes) or the refresh scheduler (for offline, automated refreshes)

8.14 Removed Account

An account state that indicates that the account has been removed from the active view of the user. This account state indicates that the account is generally not eligible for data updates, is not included in current or future net worth, and can be viewed only in the history view. This state cannot be reversed.

8.15 Site (Provider)

A site is the set of content services that can be accessed with the same credentials. An organization may have multiple sites. (Prior to 7.0, sites were called items or member items). For a given organization, the set of content services that do not require credentials are also considered a site. An example site named "Citibank Bank" may include the following content services:

- Citibank Checking
- Citibank Savings

A different site within the same organization named "Citibank Investment" may include the following content services:

- Citibank Brokerage
- Citibank Bonds

8.16 User

An actual end-user of Envestnet | Yodlee or a third-party application that leverages the Envestnet | Yodlee Platform. A user can have any role within the system, from administrator to actual consumer of an application such as Envestnet | Yodlee Personal Finance.

8.17 Valid Account

The status of an account that indicates it is eligible for general functions such as display in application views, data updates, inclusion in net worth calculations, etc.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

8.18 Envestnet | Yodlee Data Engine

The Envestnet | Yodlee Data Engine is the set of infrastructure components that intelligently aggregates, cleanses, augments, and stores data on behalf of members with their permission and using their credentials. The Envestnet | Yodlee Data Engine is capable of aggregating a highly extensible range of data from a large number of data providers using a variety of structured and semi-structured data formats.

8.19 Mem Item ID

Each user has a unique ID, called the mem ID (member ID), which has a mem item ID associated with it. Each mem item ID (member item ID) corresponds to one content services ID, which corresponds to one container. A mem item ID will have one or more item account IDs associated with it. Each item account ID corresponds to one real world account, such as a Chase Sapphire credit card or a Chase United Visa credit card. An itemID is typically an eight to ten digit unique number (Ex: 24414974) present in the response of add Account API call against the key "itemID."

8.20 Mem Site Account ID (Provider Account ID)

In some cases, there will be more than one account on a site. Each user has a unique ID, called the mem ID (member ID). This mem ID is associated with each mem site acct that the user possess, which in turn is associated with mem item ID. Each mem item ID (member item ID) corresponds to one content services ID, which corresponds to one container. A mem item ID will have one or more item account IDs associated with it. Each item account ID corresponds to one real world account, such as a Chase Sapphire credit card or a Chase United Visa credit card. Mem Site Account ID, commonly referred as memSiteAccId, is typically an eight to ten.

8.21 Status of a Service request

8.21.1 Tier 1 and/or Tier 2

8.21.1.1 Open

The service request has been escalated to Envestnet | Yodlee by the financial institution and is in the process of being investigated by a Yodlee Client Services Representative.

8.21.1.2 Pending

Indicates that the issue reported via the service request has either been addressed and is pending with the customer for resolution OR the Yodlee customer service representative requires additional information from the customer OR the service request is being worked on by a Yodlee customer service representative after receiving the necessary inputs from the customer.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential

8.21.1.3 Resolved

The service request has been addressed by the Yodlee customer service representative.

8.21.1.4 Closed

The service request that has been closed by the Tier 1 customer service representative.

8.21.1.5 Auto Closed

Applied to a service request that was in "resolved" and has been closed by the system based on the customer's System Settings.

8.21.2 Tier 2 Only

8.21.2.1 New

A newly created service request. All service requests with new statuses are seen in the unassigned queue.

8.21.2.2 Assigned

A service request has been assigned to a customer service representative but has yet to be addressed.

8.21.2.3 Work in Progress

The customer service representative has assigned the service request to the respective internal team to resolve the issue.

8.21.2.4 Reopened

A customer has reopened a service request because the issue resolution was unsatisfactory.

© 2021 Envestnet | Yodlee.™ All rights reserved. Confidential