

# **Envestnet | Yodlee My Yodlee**

## **User Guide**

2021 Q1

**Envestnet | Yodlee Confidential** 

INNOVATION APPLIED™

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## 1.1 What This Document Discusses

The Envestnet | Yodlee<sup>®</sup> 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.



## **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<sup>®</sup> 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 <u>TechPub@yodlee.com</u>.



## 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.



	Log in to your account	Yodlee
	Lisemane@Darkrame	

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.



Yodlee				
ଜ	DASHBOARD			
0j	SUPPORT	~		
5	CLASSIC			
®:	SETTINGS	~		
_				
$\bigcirc$	REPLAY FEATUR	RES		
8	QUESTIONS?			
R	MY ACCOUNT			

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



## 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





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



Chapter 2: Getting Started

#### 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 <u>Status on page 4-29</u>



new "St	atus" page.	
Track incident	s, progress, event resolution, and maintenance easily with a new	
timenne view.		
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	Paramana MCLERCO De L 2016 1 Jay De L 2016 2 Jay Gent	
	5 Ventores Vento Ventores Ventores V	

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

	Access remaining functions on the "Classic"	×
	page.	
	Find a few functions that have yet to be integrated into the new experience here. Stay tuned for continuous improvements and new features in upcoming releases.	
ar in;		
en st.		e
	••••• Previous Done	

Fig. 2-9: Classic notification

## 2.4 Menu

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



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

	N Y	odlee	
ക	ශ	DASHBOARD	
ହା	2	SUPPORT	~
C	5	CLASSIC	
©°	()°	SETTINGS	~
$\triangleright$	$\triangleright$	REPLAY FEATU	IRES
8	8	QUESTIONS?	
R	R	MY ACCOUNT	
>	<	CLOSE	

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**.



## 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 <u>In-Product Guidance on page 2-2</u>.

## 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.





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



## 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.





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.





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



## 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.





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 (<u>Configuring Tile Settings on page 3-11</u>)
- 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:





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





*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.



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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** (i) icon presents additional information about a particular tile.

**NOTE:** This feature is not available for all tiles.



User Session Le	angun Distribution (a)	↔ ×
	This 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 a good way to measure engagement.	

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

## **3.5.3 Configuring Tile Settings**

Clicking the **Settings** <sup>(2)</sup> 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 2 icon on the Service Request tile.

The Service Request Settings configuration menu is displayed.



Servíce requests					
			19/35	<ul> <li>Service request #</li> </ul>	
				🖌 Subject	
O Submitted				Status	
O Modified	30 days			Open	
				Pendíng	
All				Resolved	
80			· · ·	Closed	
Chart & rows	~	4	rows	Last updated	
			10113	Submitted	
Cashandar				Priority	
Sort order	<b>O</b> N	lewest			
Last Updated	o c	Idest			

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	<ul> <li>Select from the drop-down list. The available options are:</li> <li>All</li> <li>Assigned to me</li> <li>Created by me</li> </ul>		
Chart and Row selection	<ul> <li>Select the options from the drop-down. The available options are:</li> <li>Chart and Row selection</li> <li>Chart only</li> <li>Rows only</li> </ul>		
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.		



#### 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.

Customers				
				26/35
∎Last	4	~	Months	~
A.II.				
Chart & rows				~
90 day active users				~
Table sort order	Cha	ange from p	revious perio	d
Newest	9	6 #		
Oldest				

Fig. 3-13: The Customers 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	<ul><li>The available options are:</li><li>All</li><li>Withheld accounts</li><li>Withheld away accounts</li></ul>			
Chart and Row selection	<ul><li>The available options are:</li><li>Chart and Row selection</li><li>Chart only</li><li>Rows only</li></ul>			
Active users selection Select 90 day active users or 30 day active users.				
Table sort order         Select newest or oldest.				
Change from previous Select % or #. period				

## Table 3-2: Fields displayed on Customer configuration menu

## 2. Click Apply Settings.

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





Fig. 3-14: The Customers tile

## 3.5.4 Moving a Tile

Tiles can be rearranged on the **Dashboard** by clicking on the **Move** <sup>(1)</sup> 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**  $\times$  icon.

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

Service requests or	Are you sure you want to delete this tile?					
	Delete					

Fig. 3-15: Delete confirmation dialog box



#### 3.5.6 Downloading Tile Information

The download functionality is only available for Engagement reports.

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

#### 3.5.7 Viewing Tile Details

The customer can click the **Full Page**  $\exists \exists$  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**  $\stackrel{\blacksquare}{\equiv}$  icon on the **Service Request** tile.

The **Service Request** page is displayed.

	II (	Grid						
ជា		Q. Search by service request #	⊕ Advanced search All ✓ Displayin	ng up to 1,000	open service requests for last 90	D days. 🕚		
		Service request \ominus	Subject \ominus	Q	Status T	Last updated 🔤 🛛 🝸	Submitted \ominus	
2		10218452	Service request created for analysis		View Report 🗸	Aug 05 at 6:48 PM	Aug 05 at 6:48 PM	
C		10214252	Balance on the account is wrong		Pending	Jul 27 at 7:37 AM	Jul 27 at 7:22 AM	
:		10209668	API Related - API Service/Failure/Latency		Open	Jul 27 at 6:26 AM	Jul 15 at 2:35 PM	
		10201468	Bank of america - 402 error		Open	Jul 24 at 6:56 AM	Jun 24 at 4:07 AM	
		10212668	Service request created for analysis	for analysis View Report 🗸		Jul 23 at 3:34 PM	Jul 23 at 3:34 PM	
		10212880	Service request created for analysis		View Report 🗸	Jul 23 at 3:34 PM	Jul 23 at 3:34 PM	
		10212856	Service request created for analysis	View Report 🖌	Jul 23 at 10:20 AM	Jul 23 at 10:20 AM		
		10212316	Service request created for analysis		View Report 🗸	Jul 21 at 9:30 AM	Jul 21 at 9:30 AM	
		10212112	Service request created for analysis	View Report 🗸	View Report 🗸	Jul 21 at 9:30 AM	Jul 21 at 9:30 AM	
		10210452	Service request created for analysis		View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	
		10210256	Service request created for analysis		View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	
		10210252	Service request created for analysis		View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	
		10209864	Service request created for analysis		View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	
$\triangleright$		10209860	Service request created for analysis		View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	
8		10209680	Service request created for analysis		View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	
		10209676	Service request created for analysis		View Report 🖌	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	
~		10209856	Service request created for analysis		View Report 🗸	Jul 16 at 1:54 PM	Jul 16 at 1:54 PM	

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.





Fig. 3-17: Service request ID link

	■ Grid			원 Support groups + C	reate
ធ	Service request 10209668	Open Pe	nding Resolve Close		
2	Product Wellness / Aggregation	Write a parag	raph_		
5	Issue API Related			0/ P Upload attachment Send to Yodlee	\$500
©°	Category API Service/Failure/Latency				
	Subject API Related - API Service/Failure/Latency	()	Requesting Yodiee to investigate this issue further, API Service continues to fail.	Jul 21 at 10:31 Al	4
	Description	()	Attachment added while Create SR	Jul 15 at 2:35 PI	ч
	Case comer		Malcolm Blerman Headshot, IPG		
	Admin100028121 🗭 Edit				
	Send updates to + Add				
	Priority P3				
⊳	Open time 9 days				
ଡ					
۲					
>					

Fig. 3-18: Details of an SR



Chapter 3: Dashboard

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

Field	Description
Service Request	Displays the unique ID of the SR.
Product	Displays the name of the product
lssue	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 <b>+Add</b> 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	<ul> <li>Worklog entries can be shared internally or with the Yodlee Client Services team.</li> <li>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.</li> <li>Send internal note - Internal notes are visible only to members of the user's organization.</li> </ul>
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 <b>Service Requests</b> page.
Create	Customer can create an SR by clicking + <b>Create</b> . For more information about creating an SR, see <u>Creating a Service Request on page 4-8</u>

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



## 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 <u>Permissions on page 6-1</u> 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 <u>Automated Analysis on page 4-10</u>)

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 <u>Searching by Service Request ID on page 4-5</u>. Service requests that



**Chapter 4: Support** 

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.

	== (	Grid									*8	Support groups	+ Crea	te
â	- v	Q. Search by service request #	Advanced search	All 👻	Displaying up to 1,000	open service requests for las	ist 90 da	ays. 🕚					Expo	ort
		Service request 🗧	Subject 🕀		Q	Status	T	ast updated 🔤	τ	Submitted 🕀	т	Priority 🕀	Т	0
2		10218452	Service request created for analysis		View Report 🗸 Aug 05 at 6:48 PM		Aug 05 at 6:48 PM		P3					
5		10214252	Balance on the acc	count is wrong		Pending	Ĵ	ul 27 at 7:37 AM		Jul 27 at 7:22 AM		P3		
62		10209668	API Related - API	Service/Failure/Latency		Open	J	lul 27 at 6:26 AM		Jul 15 at 2:35 PM		P3		
-0-0		10201468	Bank of america -	402 error		Open	J	ul 24 at 6:56 AM		Jun 24 at 4:07 AM		P1		
		10212668	Service request created for analysis		View Report 🗸	J	lul 23 at 3:34 PM		Jul 23 at 3:34 PM		P3			
		10212880	Service request created for analysis		View Report 🗸	j,	ul 23 at 3:34 PM		Jul 23 at 3:34 PM		P3			
		10212856	Service request created for analysis		View Report 🗸	j,	ul 23 at 10:20 AM		Jul 23 at 10:20 AM		P3			
		10212316	Service request created for analysis		View Report 🗸	J	ul 21 at 9:30 AM		Jul 21 at 9:30 AM		P3			
		10212112	Service request cr	eated for analysis		View Report 🗸	J	ul 21 at 9:30 AM		Jul 21 at 9:30 AM		P3		
		10210452	Service request created for analysis Service request created for analysis		View Report 🗸	j	lul 17 at 8:40 AM		Jul 17 at 8:40 AM		P3			
		10210256			View Report 🗸	J	lul 17 at 8:40 AM		Jul 17 at 8:40 AM		P3			
		10210252	Service request cr	eated for analysis		View Report 🗸	J	lul 17 at 8:40 AM		Jul 17 at 8:40 AM		P3		
		10209864	Service request cr	eated for analysis		View Report 🗸	J	lul 16 at 1:57 PM		Jul 16 at 1:57 PM		P3		
$\triangleright$		10209860	Service request cr	eated for analysis		View Report 🗸	,	lul 16 at 1:57 PM		Jul 16 at 1:57 PM		P3		
8		10209680	Service request cr	eated for analysis		View Report 🗸	Û	lul 16 at 1:57 PM		Jul 16 at 1:57 PM		P3		
		10209676	Service request cr	eated for analysis		View Report 🗸	J	lul 16 at 1:57 PM		Jul 16 at 1:57 PM		P3		
		10209856	Service request cr	eated for analysis		View Report 🗸	J	lul 16 at 1:54 PM		Jul 16 at 1:54 PM		P3		
>			1920 P 19	12.221 10.2		12011201-0112								

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 <u>Dashboard Service</u> <u>Request ID Link on page 3-16</u>.





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: .

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.			

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



**Chapter 4: Support**
Field	Description					
Send updates to	Displays the name of other users who have been copied for updates on the service request. Clicking <b>+Add</b> 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 <b>Internal note</b> box that are only visible to their respective organization by using the toggle option,					
Send Back To Yodlee or Add comment	<ul> <li>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:</li> <li>Send Back to Yodlee - User can reassign the ticket to Yodlee.</li> <li>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.</li> <li>Add comment - Selecting Add Comment will add the inputs to the service request without changing the status.</li> <li>Close Service Request - Marking the SR as closed will close the SR.</li> </ul>					
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 <b>Permissions</b> . 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 <b>Service Requests</b> 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:



- 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.

	<b>II</b> 0	irid					암. Support groups	+ Create
ធ	□ • [	Q. Search by service request #	Advanced search All 👻 Displaying up to	1,000 open service requests for last §	PO days. 0			Export
		Service request \ominus	Subject 🕀	Q Status	Last updated 🔤 🛛 🍸	Submitted 🕀	Priority 🕀	<b>T</b>
2		10218452	Service request created for analysis	View Report 🗸	Aug 05 at 6:48 PM	Aug 05 at 6:48 PM	P3	
5		10214252	Balance on the account is wrong	Pending	Jul 27 at 7:37 AM	Jul 27 at 7:22 AM	P3	
©.		10209668	API Related - API Service/Failure/Latency	Open	Jul 27 at 6:26 AM	Jul 15 at 2:35 PM	P3	
		10201468	Bank of america - 402 error	Open	Jul 24 at 6:56 AM	Jun 24 at 4:07 AM	P1	
		10212668	Service request created for analysis	View Report 🗸	Jul 23 at 3:34 PM	Jul 23 at 3:34 PM	P3	
		10212880	Service request created for analysis	View Report 🗸	Jul 23 at 3:34 PM	Jul 23 at 3:34 PM	P3	
		10212856	Service request created for analysis	View Report 🗸	Jul 23 at 10:20 AM	Jul 23 at 10:20 AM	P3	
		10212316	Service request created for analysis	View Report 🗸	Jul 21 at 9:30 AM	Jul 21 at 9:30 AM	P3	
		10212112	Service request created for analysis	View Report 🗸	Jul 21 at 9:30 AM	Jul 21 at 9:30 AM	P3	
		10210452	Service request created for analysis	View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	P3	
		10210256	Service request created for analysis	View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	P3	
		10210252	Service request created for analysis	View Report 🗸	Jul 17 at 8:40 AM	Jul 17 at 8:40 AM	P3	
		10209864	Service request created for analysis	View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	P3	
$\triangleright$		10209860	Service request created for analysis	View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	P3	
P		10209680	Service request created for analysis	View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	P3	
		10209676	Service request created for analysis	View Report 🗸	Jul 16 at 1:57 PM	Jul 16 at 1:57 PM	P3	
-		10209856	Service request created for analysis	View Report 🗸	Jul 16 at 1:54 PM	Jul 16 at 1:54 PM	P3	
/			nama ini ta'san na a	101121 0112				

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



		Srid								繒	R Support groups	( + C	Ireate
â	- v	Q. Search by service request #	€ Advanced search	All 🗸	Displaying up to 1,000	open service requests fo	r last 90 days. 🚺					[]+ E	xport
00		Service request	Subject 🕀	_	٥	Status	▼ Last updated 🖨	T Subr	nitted 🕀	T	Priority 🖯	T	0
98		10218452	Service request creat	ed for analysis service	ce request 0	View Report 🗸	Aug 05 at 6:48 PM	Aug	05 at 6:48 PM		P3		
5		10212668	Service request creat	ed for analysis		View Report 🗸	Jul 23 at 3:34 PM	Jul 2	3 at 3:34 PM		P3		
se <sup>e</sup>		10212880	Service request creat	ed for analysis		View Report 🗸	Jul 23 at 3:34 PM	Jul 2	3 at 3:34 PM		P3		

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.

	 Grid							×
						Search by		Search
a	Q Search by service request #	Advanced search All	Displaying up to 1,000	open service requests for last 9	D days. 🕚	Username (GUID)	~	Q. Search by username (GUID)
	Service request 🗧	Subject 🕀		Status 🕎	Last upda			
2	10218452	Service request created for analysis		View Report 🖌	Aug 05 at	Issue		Category
Ð	10214252	Balance on the account is wrong		Pending	Jul 27 at 7	Select Issue	~	Select Issue category V
8	10209668	API Related - API Service/Failure/Latency		Open	Jul 27 at c			
	10201468	Bank of america - 402 error		Open	Jul 24 at 4	Status		Priority
	10212668	Service request created for analysis		View Report 🖌	Jul 23 at 3	Select status	Y	Select priority $\lor$
	10212880	Service request created for analysis		View Report 🗸	Jul 23 at 3	Case owner		Reporter
	10212856	Service request created for analysis		View Report 🗸	Jul 23 at :	Select case owner	~	Select reporter V
	10212316	Service request created for analysis		View Report 🗸	Jul 21 at §			
	10212112	Service request created for analysis		View Report 🗸	Jul 21 at 9	Submitted on	~	🗎 May 12, 2020 - August 10, 2020
	10210452	Service request created for analysis		View Report 🖌	Jul 17 at 8			
	10210256	Service request created for analysis		View Report 🗸	Jul 17 at 8			Reset

*Fig.* 4-6: *The Advanced Search window* 

Table 4-2: Fields on Advanced Search window

Fields	Description
Search by	<ul> <li>Select the search by options from the drop down. The available options are:</li> <li>Username (GUID)</li> <li>Email address</li> <li>Frist and last name</li> <li>Content service ID</li> <li>Site ID</li> </ul>
Search	Field to enter the desired Search by criteria.
lssue	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.



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	<ul> <li>Select the priority from the drop down. The user can select more than one priority. The available options are:</li> <li>P1</li> <li>P2</li> <li>P3</li> <li>P4</li> <li>P5</li> </ul>
Case owner	Select the case owner's name from drop down.
Reporter	Select the reporter's name from the drop down.
Date Selection	<ul> <li>The available options are:</li> <li>Submitted on</li> <li>Resolved on</li> <li>Closed on</li> <li>Last updated on</li> <li>Select from date and to date between which the SRs were created.</li> </ul>

	Table 4-2:	Fields	on Advar	nced Search	window
--	------------	--------	----------	-------------	--------

#### 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.



		Grid						100	antibout Bronth	+ Create
0		Q. Search by service request #	Q Advanced search	All 👻 Displaying up to 1.000	open service requests for last 90 d	Wrs. O				D- Export
2	2	stusi Open X Subject: "Service request" Service request	x Clear all	Subject 🕆 🔍 🔍	Issue	Category	Submitted 🖗 🍸	Last updated	T Pri	iority 🗄 🍸 🎯
5		10225252	Open	Service request created for analysis	Accounts & Balances	Account Holder Name	Sep 23, 2020 at 2:56 AM	Feb 04 at 2:45 PM	P3	¢.
(C)		10222864	Open	Service request created for analysis	Link / Add Account or Refr	Falure	Aug 26, 2020 at 7:51 AM	Feb 05 at 12:25 PM	PO	6
		10222660	Open	Service request created for analysis	Link / Add Account or Refr_	Failure	Aug 26, 2020 at 7:51 AM	Feb 04 at 6:21 PM	PJ	Ú.
		10222860	Open	Service request created for analysis	Link / Add Account or Refr	Fallure	Aug 26, 2020 at 7:51 AM	Feb-04 at 6:22 PM	P3	0
		10222056	Open	Service request created for analysis	Link / Add Account or Refr_	Failure	Aug 25, 2020 at 7:38 AM	Feb 04 at 6:22 PM	PG	0
		10210252	Open	Service request created for analysis	Accounts & Balances	Incorrect Balance	Jul 17, 2020 at 8:40 AM	Feb 04 at 6:22 PM	P3	i.
									< 1	> 50/page
$\triangleright$										
ଡ										
0										

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 <u>Creating a Normal Service Request on page 4-8</u>
- Automated Analysis The user can fill in the mandatory fields and submit the service request for automated analysis. request. For more details, refer to <u>Automated</u> <u>Analysis on page 4-10</u>.

#### 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



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 dropdown 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**.



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Field	Descriptions
Product	Select the product from the drop-down list.
lssue	The Issue list will be presented after selecting a <b>Product</b> . Select an issue from the drop-down list or use the search option to search for an issue.
Category	After choosing the <b>Issue</b> , the corresponding categories are displayed dynamically based on the Issue choice made. Select the category from the list of options displayed.
Subject	The <b>Subject</b> field will be automatically populated based on the <b>Issue</b> selected. The <b>Subject</b> 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 <b>Description</b> field by clicking <b>Copy</b> 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 <b>Add</b> 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.

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

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 <u>Analyzing a Service Request on page 4-12</u> and the **Help** page - Using the automated resolution engine video.

#### To create a Service Request using the automated analysis tool

Follow the same steps outlined in section <u>Creating a Normal Service Request on page 4-8</u> 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.

Grid T Create SK X				용: Support group
roduct				
Wellness / Aggregation 🗸				
isue				
Q, Accounts & Balances ∨				
ategory	D. H			
Account Holder Name Asset Classification	Duplicate Full Account Number	Incorrect Account type Incorrect Bala	nce Missing	
arch				
Q, Username (GUID) v demo	<b>o</b> Q			
TestSite for Bill5 - Bills - bills (4353)	Item accoun	t ID Last refreshed	Error status	
Bill - 4 (xxxx3JS2)	3744	Jun 15, 2017 at 12:50 F	м	
My account (xxx2342)	293966	Jun 15, 2017 at 12:50 F	м	
Dummay Bill Account (xx3456)	394905	Jun 15, 2017 at 12:50 P	M	
Loo.	×			
New Pank Name - hank (7356)	Item account	it ID Last refreshed	Error status	
Hew Dank Hame Dank (7050)				
CDBank1 (xxxx5544)	7404	N/A	Not an Error [801]	
CDBank1 (xxxx5544) Wells Fargo - Bank - bank (4158)	7404 Item accoun	N/A t ID Last refreshed	Not an Error [801] Error status	
CDBank1 (boox5544)      Wells Fargo - Bank - bank (4158)      demo_bank3 (boox5666)	7404 Item accoun 4058	N/A it ID Last refreshed N/A	Not an Error [801] Error status Not an Error [801]	
CDBank1 (box05544) Wells Fargo - Bank - bank (4158) demo, bank3 (box5666) New Bank Name - bank (9951)	7404 Item accoun 4058 Item accoun	N/A t ID Last refreshed N/A t ID Last refreshed	Not an Error [801] Error status Not an Error [801] Error status	
CDBank1 (2005544)  CDBank2 (2005544)  demo.bank3 (2005666)  New Bank Name-bank(9951)  Bank_LgWdw(_118 (2001300)	7404 Item accoun 4058 Item accoun 10503	N/A tID Last refreshed N/A tID Last refreshed Jul 10, 2010 at 5:55 PM	Not an Error [801] Error status Not an Error [801] Error status	
C CDBmk1 (boxc5544) Wells Fargo - Bank - bank (4158) C demo_bank3 (box5666) New Bank Name - bank (9951) Bank_LgWdw(_118 (boxc1300))	7404 Item accoun 4058 Item accoun 10503	N/A Last refreshed N/A t ID Last refreshed Jul 10, 2010 at 5:55 PM	Not an Error [801] Error status Not an Error [801] Error status	
CDBank1 (xxxx544) Wells Fargo - Bank - bank (4158) demo. bank3 (xxx566) New Bank Name - bank (9951) Bank_LgWdw(_118 (xxx1300))	7404 Item accoun 4058 Item accoun 10503	N/A t ID Last refreshed N/A t ID Last refreshed Jul 10, 2010 at 5:55 PM	Not an Error [801] Error status Not an Error [801] Error status	
CDBank1 (xxxx544) Wells Fargo - Bank - bank (4158) demo, bank3 (xxx566) New Bank Name - bank (9951) Bank_LgWdw(_118 (xxx01300) Cancel Analyze	7404 Item accoun 4058 Item accoun 10503	N/A Last refreshed N/A t ID Last refreshed Jul 10, 2010 at 5:55 PM	Not an Error [801] Error status Not an Error [801] Error status	

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

Table 4-4: Fields on the	automated an	nalysis tool	enabled SF	<i>R</i> submission	page
					1 2

Field	Description
Product	Select the product from the drop-down list.
lssue	The <b>Issue</b> list will be presented after selecting a <b>Product</b> . 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.



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Field	Description
Search	Search for a customer, account, or site against which to file a service request. <b>NOTE:</b> 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.

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

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 <u>Automated Analysis on</u> page 4-10.

II G	id					路 Support group
	Q. Search by service request #	⊕ Advanced search All (16) ✓				
	Service request 😓	Subject 😓	Q Status	Last updated 🔤 🛛 🍸	Submitted 🖨	Priority 🕀
	10202876	Service request created for analysis	Analyzing 🔿	Today at 3:45 PM	Today at 3:45 PM	P3
	10202868	Service request created for analysis	View Report 🗸	Today at 9:38 AM	Today at 9:38 AM	P3
	10202864	Service request created for analysis	View Report 🗸	Today at 9:37 AM	Today at 9:37 AM	P3
	10202144	API Related - API Service/Failure/Latency	Open	Yesterday at 11:35 AM	Yesterday at 11:35 AM	P3
	10202140	Refresh failure	Open	Yesterday at 10:49 AM	Yesterday at 10:37 AM	P3
Ċ.	10202100	Service request created for analysis	View Report 🗸	Yesterday at 7:53 AM	Yesterday at 7:53 AM	P3

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 <u>Creating a Service Request on page 4-8</u>.



И констания	III Grid  ✓ View 10103705 × O View 10	0106181 ×			?음t Support groups	+ Create
ଜ	Service request 10106181					
2	User ID demouser					
5	Product Wellness / Aggregation					
88	Issue Accounts & Balances					
	Category Account Holder Name		0	Analysis in progress. May take a few mi	nutes.	
	Subject Service request created for analysis			Close service request Contact Yodlee support representative		
	Description Service request created for analysis					
	Account Bill - 4					
	Site Name(Site Id) TestSite for Bill5(8600)					
	Memiltem ID 303336	13				
	item account ID 286136					
	Case owner & pratimaorbit					
	Send updates to N/A					
$\triangleright$	Priority P3					
P	Open time A minute					
>						

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 b	elow are displayed.
--------------------	---------------------

•	Grid O View 10212856 × ✓ View 10212316 ×		\$23. Support groups + Create
	Entries second		
ଜ	10212856		
	User ID		
2	yodTest		
	Product Wellness / Aggregation		
•D		"Subject	
60	Issue Accounts & Balances	Provide the subject	
00			
	Category	"Description View best practices to expedite the resolution P3 (72)	
	inconect Account type	Describe the issue	
	Subject		
	Service request created for analysis	0/3500	
	Description Service request created for analysis	Dpload attachment	
	Assessed	Send updates to: + Add	
	TESTDATA	Case owner & Admin100028121 😰 Edit	
	Site Name (Site ID) DagBank(8995)	Cancel Submit	
	Mem site account ID 11101136		
$\triangleright$	Mem item ID		
0	10187860		
B	Item account ID		
	10169388		
>	Case owner & Admin100028121		

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



Field	Description
Subject	The <b>Subject</b> field will be automatically populated based on the Issue selected. The <b>Subject</b> 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 <b>Description</b> field by clicking the <b>Copy</b> 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.

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

#### 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.

0	Service request created #10106179	×
0	Service request created #10106180	×
0	Service request created #10106181	×

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.



		Grid	10218452 ×					원 Support groups	+ Cre	ate
ŵ	[] ×	Q. Search by service request #	Advanced search All v	Displaying up to 1,000	l open service requests for last 9	Ddays. 🕚			Exp	ort
		Service request 👌	Subject 🕀	Q	Status 🕎	Last updated 🗧 🍸	Submitted 🖯	▼ Priority 🕀	Ţ	۲
8		10218452	Service request created for analysis	(	View Report 🗸	Aug 05 at 6:48 PM	Aug 05 at 6:48 PM	P3		
5		10214252	Balance on the account is wrong		Pending	Jul 27 at 7:37 AM	Jul 27 at 7:22 AM	P3		
<u>a</u> :		10209668	API Related - API Service/Failure/Latency		Open	Jul 27 at 6:26 AM	Jul 15 at 2:35 PM	P3		
~~0		10201468	Bank of america - 402 error		Open	Jul 24 at 6:56 AM	Jun 24 at 4:07 AM	P1		

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 <u>Creating a Service Request on page 4-8</u>.

Subject	N	
Link account issues	14 <sup>9</sup>	
Description		P3 📝
Describe the issue		
		0/500
Dpload attachment		

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

Field	Description
Subject	The <b>Subject</b> field will be automatically populated based on the Issue selected. The <b>Subject</b> 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.

Table 4-6: Fields on the additional information page



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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.

Table 4-6: Fields on the additional information page

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.

III Grid 🗸 View 10212668 🗴			181 Support groups + Create
Service request 10212666 User ID vedTest	We analyzed the account and i issue.	t appears there is a problem. We ma	w need your help to resolve this
Product Wellness / Aggregation	We checked	We found	Next steps
Issue Accounts & Balances	Financial institution site health (99.51%)     My customers accounts at financial institution (100%)	Account is failing at the end site with the following response: $\ensuremath{\mathbb{T}}\xspace{A}\xspace{A}$	Please check if the user is accessing a different login URL. If so, please provide it to Yodlee for further investigation.
Category Incorrect Account type	Financial institution site URL: http://64.14.28.129/dag/index.do	The account is failing due to incorrect credentials.	Please ask the user to validate their credentials at the end site and initiate a refresh.
Subject Service request created for analysis			Please advise the user to not use any auto-saved passwords from the browser.
Description Service request created for analysis	Contact Yodiee support representative Close service	ce request	
Account TESTDATA			
Site Name (Site ID) DagBank(8995)			
Mem site account ID 11101136			
Memitem ID 10187860			
Item account ID 10169388			

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.



	원 Support groups +	- Create
We analyzed the accour resolve this issue.	nt and it appears there is a problem. We may need your hel	p to
*Subject		
Test problem		
*Description	View best practices to expedite the resolution	n P3 🗹
- Detailed issue description - Impact: single user or multiple users? - If multiple users, provide one or more impac	ted user or account i dentifiers like Provider Account ID / Site Account ID, Mem Site Account ID	
🗄 Upload attachment		211/350
Send updates to: (Himanth.Kumar@yodlee.com X	INeelam@yodlec.com × + Add	
Case owner 🙎 Madhura Kulkarni 📝 Edit		
		Submit

Fig. 4-19: Automated analysis sample report

				器 Support groups	+ Create
				Beta	
We're sorry; we were unable to proceed.	o complete the analysis. Please	provide additi	onal inform	ation to	
"Subject					
Provide the subject					
*Description Describe the issue	View best practices to expedite the resolution P	3 🗭			
		le			
Dupload attachment		0/3500			
Send updates to: + Add					
Case owner & Representative100194929 🔀 Edit					
Cancel Submit					

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.



**Chapter 4: Support** 

#### 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.

	Q	Search by site ID o	rname				B+ D	cport 📋 Request new site support
ଜ		Site ID	Cite name	Pass UDI	Logia UDI	MEA trans	Comported account to max	Country 0
0	0	31(E1D	Charles Caburah	base ORL	Edgin ORE	Teles Id	Pank Control account types	Country C, @
-	4	21	Charles Schwab	nttps://www.sc	nttps://www.scnwab.com/public/scnwab/nn	loken la	Bank, Cards, Investments, Loan/ I	M United States
5	4	5	Wells Fargo	https://www.w	https://connect.secure.wellsfargo.com/auth/	Multi Level	Bank, Cards, Investments, Loan/ 1	M United States
6 <b>2</b>	Ą	19686	HSBC	http://www.hs	https://www.hsbc.com.my/1/2/!ut/p/c5/04	Token Id	Bank, Cards, Investments, Loan/1	M Malaysia
~~	Ą	7634	Custom Bank	http://www.yo	https://www.customsite.com		Bank, Cards, Bills, Investments, L	0
M	¢	3677	First Citizens Bank	https://www.fi	https://digitalbanking.firstcitizens.com/fcbtc	Multi Level	Bank, Cards, Investments, Loan/1	M United States
	¢	3942	Alaska USA FCU	http://www.ala	http://www.alaskausa.org/		Bank, Loan/ Mortgage	United States
	¢	16441	Dag Site	http://64.14.2	http://64.14.28.129/dag/index.do		Bank, Cards, Bills, Investments, L	o United States
	(j)	4987	Ozona National Bank	https://www.o	https://onlinebanking.ozonabank.com/Login	Multi Level	Bank, Loan/ Mortgage	United States
		19488	HongLeong Bank	https://www.hl	https://s.hongleongconnect.my/rib/app/fo/lo	Security Question	Bank, Cards, Investments, Loan/ I	M Malaysia
	_	16609	OCBC Bank	https://www.o	https://internet.ocbc.com/internet-hasking/	Image	Bank, Cards, Investments Loop/	Singapore
		_						
		1379	American Assn. of University Women Visa Care	https://www.c	https://chaseonline.chase.com/Logon.aspx?L	Multi Level	Cards	United States
		1383	Austin Peay Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
		1384	Ball State University Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
		1386	Bloomberg Financial Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
		1387	Buffalo State College Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
		1388	Cal State Hayward Visa Card	https://www.c	https://chaseonline.chase.com/Logon.aspx?L		Cards	United States
		1389	Cal State Northridge Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
		1390	Cal State Sacramento Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
$\triangleright$		1391	Central Washington University Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
8		1394	Cornell Visa Card	https://www.c	https://secure01c.chase.com/web/auth/dash	Multi Level	Cards	United States
A		8266	United Heritage CU	http://www.uh	https://www.myaccountaccess.com/onlineC	Security Question	Cards	United States
>							< 1 2 3 4 5	455 > 50/page Go to

Fig. 4-21: Sample of Sites page



Fields	Description
Search by	Search by Site ID or name to find a specific site
Export	Clicking <b>Export</b> will download CSV/Excel file with all the details on the <b>Site</b> 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 <u>Requesting New Site</u> <u>Support on page 4-22</u>
Site ID	Unique ID associated with a site. If the site has any alerts a <b>Bell</b> Icon is displayed against the Site ID. For more information about the Bell icon, see <u>Viewing Site</u> <u>Alerts on page 4-19</u>
Site Name	Lists the site name. Clicking <b>Site Name</b> displays the underlying details for a site including specific details for different account types. For more information, see <u>Viewing Site-Specific Information on page 4-21</u> . Historical alert information for the past 30 days is displayed for each site. If there is no active alert, the Information ① icon is displayed that provides historical alert information.
Base URL	Displays the base URL.
Login URL	Displays the login URL.
МҒА Туре	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.

#### Table 4-7: Fields on the Sites page

# 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** <sup>(4)</sup> 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



- 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.

American Express Cards   12 https://www.americanexpress.com/us/		
https://online.americanexpress.com/myca/acctsumm/us/action?request_type=aut		
OPEN		
In Progress: Site Temporarily Unavailable (SA001)	5% Impact	06/19/2020 7:00 am Estimated resolution time
As part of our proactive monitoring, we have observed/informed that American Express Cards will be unavailab American Express Cards Site Id: 12 Impacted Container : Rewards Impact : 5%	le between 06/17/2020 and 06/19/2020.We will keep	you updated with the Progress. Site Display Name :
Miles     Bank     Cards     Stocks		
Last updated: 06/17/2020 7:00 am   Published on: N/A   Start date: 06/17/2020 7:00 am   Error code: null		

Fig. 4-22: Site Alert dialog box

Table 4-8:	Fields	on	the	Site	Alert	dialog	box
						<u> </u>	

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.



# 4.3.3 Viewing Site History

If there are no active site alerts for a site, the user may see an **Information** (i) 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.

https://www.chase.com/		
https://secure07b.chase.com/web/auth/dashboard		
N		
In Progress: Site Temporarily Unavailable (SA0025)	15% Impact	06/17/2020 7:00 am Estimated resolution time
s part of our proactive monitoring, we have observed/Informed that Chase will be unavailable between 43 Impacted Container : Banking, Credit Cards Impact : 15%	06/15/2020 and 06/17/2020.We will keep you updated wit	h the Progress. Site Display Name : Chase Site Id :
Bank     Gredits     Stocks     Loan / mortgage     Rewards		
st updated; 06/15/2020 7:00 am   Published on: N/A   Start date: 06/15/2020 7:00 am   Error code: null		
DSED		
Resolved: Site Temporarily Unavailable (SA00102)	16% Impact	06/16/2020 7:00 am Estimated resolution time
Resolved: Site Temporarily Unavailable (SA00102)  s part of our proactive monitoring, we have observed/Informed that Chase will be unavailable between 43 impacted Container : Credit Cards, Credit Cards impact : 16%	16% Impact 06/14/2020 and 06/16/2020.We will keep you updated wit	06/16/2020 7:00 am Estimated resolution time h the Progress. Site Display Name : Chase Site Id :
	16% Impact 06/14/2020 and 06/16/2020.We will keep you updated wit	06/16/2020 7:00 am Estimated resolution time h the Progress. Site Display Name : Chase Site Id :
Resolved: Site Temporarily Unavailable (SA00102)  s part of our proactive monitoring, we have observed/Informed that Chase will be unavailable between 13 Impacted Container : Credit Cards, Credit Cards Impact : 16%      Credits Bank Stocks Loan / mortgage Rewards  RCA: Site was temporary unavailable.	16% Impact 106/14/2020 and 06/16/2020.We will keep you updated wit	06/16/2020 7:00 am Estimated resolution time h the Progress. Site Display Name : Chase Site Id : 06/15/2020 7:00 am

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



- Customers
- Volume by # of accounts

	Viewing: Current_	DC 🗸 Yodlee 🗸									×
	Q Search by site I	D or name	WF Wells Fargo https://www.	5 wellsfargo.com/							
ଜ	Site ID	Site name	https://connect	secure.wellsfargo.com	v/auth/login/present?origin=yoi	llee					
2	¢ 5	Wells Fargo	Type of account	Sum info ID	Support status	Auto refresh	Quality	Absolute value	Customers	Volume by # accounts	
	A 1434	Pittsburg State Visa Card	Credits	982	On   Supported	Enabled		117,569	231	100%	
5	1432	site20000002	Bank	5	Off   Supported	Disabled				0%	
©:	4151	TestSite New	Loans	4594	On   Supported	Enabled				0%	
	7634	Custom Bank	Mortgage	3797	On   Supported	Disabled				0%	
	4156	TestSite for Card	Investments	10862		Disabled				0%	
	8995	DagBank									
	8999	DagLoan								< 1 > 507 pag	,ee
	8998	DagCreditcard									
	16441	Dag Site									

Fig. 4-24: Information of a site

Table + J. Lielas of the sile specific details page	Table 4-9: F	ields 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	<ul> <li>Displays the current support status that includes:</li> <li>On/Off</li> <li>Supported - Account type is supported</li> <li>Supported Beta - Account type supported in beta</li> <li>Not Searchable - Account type is currently unavailable due to a prolonged outage or issue</li> <li>Not available - Account type is not supported</li> </ul>
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



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**  $\exists \exists$  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**
- On the My Yodlee page, click Support. The Support menu is displayed.
- 2. Click Customers.

The **Customers** page is displayed.

	Q Username (GUID) ~							al C A	Name, address, & ema	il will popu	ulate if provide	d to Yodlee by your com	pany and if e	nabled fo	ir you.
~	Username (GUID)	2, Name	Q Status	T	Account created	τ	Last accessed	T	Updated on	T	City	Q	State	Q	0
uu	YU-346228677-1152		Active		Apr 19, 2012 at 2:41 PM		Jul 12 at 12:23 AM		Jul 12 at 12:23 AM						
2	04bfd2d0e5804109a3cd939dfaad2082		Active		Mar 03 at 6:10 PM		Jul 10 at 8:35 PM		Jul 10 at 8:35 PM						
5	YU-1661242220-363		Active		Aug 29, 2011 at 1:42 PM		Jul 10 at 7:40 PM		Jul 10 at 7:40 PM						
~	96f42ad74c914d7688ed9ec0b26253a2		Active		Oct 30, 2013 at 12:51 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
85	06510c2c85334ac49960a5e34b87e48a		Active	-	Mar 14, 2018 at 12:06 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	10b10015feb44a95a40aee7dee42ee0c		Active	-	Mar 09, 2018 at 3:31 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	057be2df4431443c81a1b76c52f4d0b1		Active	•	Feb 12, 2018 at 8:23 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	32a5e057d8244409a70f5f4b35be235d		Active	•	Jan 25, 2018 at 2:11 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	403693f8b6e740c48bb894d841ddb18c		Active		Jan 25, 2018 at 1:40 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	530b8142cb51474baf395dcff5a7063e		Active		Jan 24, 2018 at 7:05 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	d591731c2c004d18a51fe34706045782		Active		Jan 24, 2018 at 1:40 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	75addde676a7448e9c603b5b797b6db9		Active		Jan 24, 2018 at 7:01 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	28a5ab7b709f441ea0d25c004371e3a6		Active	•	Jan 23, 2018 at 2:13 PM		Jul 09 at 11:34 PM		Jul 09 at 11:34 PM						
	bc8588d041094dde839b481569dad624		Active	•	Jan 16, 2018 at 11:53 PM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						
$\triangleright$	2a1e066bfd6c4574b67e4dc40407b35d		Active	•	Jan 17, 2018 at 1:10 AM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						
8	0507c85c17544815b567f04d3d62c6a1		Active	•	Jan 16, 2018 at 3:24 PM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						
•	badd5a4188cf492eb0e62162980989b1		Active		Jan 16, 2018 at 1:26 PM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						
	41724cfc87de41ad80bf7583e015e958		Active	•	Jan 16, 2018 at 12:30 PM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						
>	fb7e5fdcb37a4ea090d8c328fceaa506		Active		Jan 12, 2018 at 7:32 PM		Jul 09 at 11:33 PM		Jul 09 at 11:33 PM						

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 <b>Role</b> under the <b>Permissions</b> page.



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Fields	Description
Status	<ul> <li>Displays the status of a customer. The following statuses can be applicable:</li> <li>Active</li> <li>Inactive</li> <li>Suspended</li> <li>Deleted customers are not shown.</li> </ul>
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 <b>Role</b> through the <b>Permissions</b> 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 <b>Role</b> through the <b>Permissions</b> 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 <b>Role</b> through the <b>Permissions</b> 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 <b>Role</b> through the <b>Permissions</b> 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 <b>Role</b> through the <b>Permissions</b> page.

#### Table 4-10: Filters on the Customer 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)



	(	Q. Username (GUID) ~	)							al	<b>b</b> .b	Name, address, & email will	popul	ste if provided to Yodlee by your co	ompa	ny and if er	nabled for yc
â		Username (GUID)	Q	Name Q	Status		T	Account created	T	Last accessed	T	Updated on	Т	City C	2	State	Q
		dc88c1ee4c18424bb377fbc83054ecce		Active	•		Aug 08, 2019 at 11:59 PM		Yesterday at 12:42 AM		Yesterday at 12:42 AM						
2		f7c0710e78e94c739440c0aef40025bd			Active	•		Aug 08, 2019 at 11:40 PM		Yesterday at 12:42 AM		Yesterday at 12:42 AM					
5		5a781aa7972543c689a446c27f7db970		Active	×		Aug 08, 2019 at 11:48 PM		Yesterday at 12:42 AM		Yesterday at 12:42 AM						
~		5a9ac4b1854348d085ff0f0a0419aeee			Active	~		Aug 08, 2019 at 5:18 PM		Yesterday at 12:42 AM		Yesterday at 12:42 AM					
(C)_		19d7485ad2a64c56a605dd825a77c4ec			Active	•		Aug 07, 2019 at 1:00 AM		Yesterday at 12:42 AM		Yesterday at 12:42 AM					

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 <b>Success</b> . 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 <b>Success</b> . 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	<ul> <li>Click View History will display Aggregation and/or Verification history for an account based on the last 40 refresh attempts <i>Figure 4-29</i>.</li> <li>Depending on which products are enabled, this page will show:</li> <li>Aggregation History</li> <li>Verification History</li> <li>Balance Verification History</li> <li>Document Download History</li> </ul>
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 <b>Balance</b> field is controlled for by the administrator. The field can be made visible for a <b>Role</b> through the <b>Permissions</b> page.



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	<ul> <li>Click the funnel and select the options to display the status and click OK.</li> <li>The available options are:</li> <li>Active</li> <li>Suspended</li> <li>Dormant</li> </ul>
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.

#### Table 4-11: Columns when searching by account

# 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 <u>Searching for a Customer or an Account on page 4-24</u> will be available on this page.



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 <u>Searching for a Customer or an</u> <u>Account on page 4-24</u>, 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).

<i></i>	All Users		O Test yodTest		Net worth Currently una	available	Acti	s	May 15, 2015 at 6:41 PM Last accessed	Dec 21, 20 Account crea	09 at 7:47 AM ated	Jane_doe@yo Email	dlee.com			
	Q Search				al 📽 🐼	Balan	ce & transactions will p	opulate if enabled fo	or you.							View transactions
	Site name	Q	Account name	Q	Account type	Q	Verification stat Q	Refresh sta Q	Last successful refresh 🗧 🍸	History	Balance	Account nu Q	Item accou Q	Transfer ac Q	Production Q	Last modified 🗧 🗧
	DagBank							🔒 User Error (		View history						
	DagBank		TESTDATA		Checking		Success	🟮 User Error (	Jun 19, 2011 at 10:19 PM	View history	\$54.78	2000x3100x	10169388		Aggregation, V	Jun 19, 2011 at 10:19
	DagBank		TESTDATA1		Savings		Success	🟮 User Error (	Jun 19, 2011 at 10:19 PM	View history	\$65,454.78	x000x3100x	10169392		Aggregation, V	Jun 19, 2011 at 10:19
	DagBank		TESTDATA		Checking			🚺 User Error (	Jul 30, 2011 at 9:12 PM	View history	\$54.78	x000x3x00x	10175028		Aggregation	Jul 30, 2011 at 9:12 F
	DagBank		TESTDATA1		Savings			🚺 User Error (	Jul 30, 2011 at 9:12 PM	View history	\$65,454.78	x000x3x00x	10175032		Aggregation	Jul 30, 2011 at 9:12 F
	DagBank		TESTDATA1		Savings		Success	🚺 User Error (	Jun 29, 2011 at 11:15 PM	View history	\$65,454.78	x2225	10260592		Aggregation, V	Jun 29, 2011 at 11:15
	DagBank		TESTDATA		Checking		Success	🟮 User Error (	Jun 29, 2011 at 11:15 PM	View history	\$54.78	x2224	10262052		Aggregation, V	Jun 29, 2011 at 11:15
	DagBank		TESTDATA		Checking		Success	🚯 User Error (	Jun 22, 2011 at 9:20 PM	View history	\$54.78	xx3456	10169684		Aggregation, V	Jun 22, 2011 at 9:20
	DagBank		TESTDATA1		Savings		Success	🚯 User Error (	Jun 22, 2011 at 9:20 PM	View history	\$65,454.78	xxx4567	10169688		Aggregation, V	Jun 22, 2011 at 9:20
	DagBank		TESTDATA		Checking		Success	🚯 User Error (	Jun 22, 2011 at 9:20 PM	View history	\$54.78	xx3456	10251676		Aggregation, V	Jun 02, 2011 at 8:10
	DagBank		TESTDATA		Checking			🚯 User Error (	Dec 20, 2010 at 3:30 AM	View history	\$54.78	x000x3x0xx	10221272		Aggregation	Dec 20, 2010 at 3:30
	DagBank		TESTDATA1		Savings			🚯 User Error (	Dec 20, 2010 at 3:30 AM	View history	\$65,454.78	x000x3x00x	10221276		Aggregation	Dec 20, 2010 at 3:30
			DAG INVESTMEN	NT	Hokoown			O User Error (	Feb 04, 2010 at 9:04 AM	View history	\$123,456.00	xx5555	10174840		Aggregation	Feb 04, 2010 at 9:04

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

	Vie	wing: Boston Financial	~							
	<i></i>	All Users	e wbee	16624404 User's ID (Mem ID)	\$27,513.46 Net worth Based on latest calculation	Active Status	Mar 27, 2017 at 5:27 PM Last accessed	Sep 21, 2014 at 4:01 PM Account created		
		Q Search		<b>11 😪 </b> Ba	alance & transactions will p	opulate if enabled for you.				Service requests
		Site name Q	Account name Q	Account type	Q Verification stat Q	Refresh status	Q, Last successful refresh 🔶	T History Balance	Account nu Q	Active (80)
		DagBank	Super Checking	Checking	Success	Success	Aug 26, 2020 at 6:49 PM	View history	xxxx3934	19756496
2		DagBank	TESTDATA	Checking	Success	Success	Aug 24, 2020 at 3:29 PM	View history	2000(3)000	21080916
·		DagBank		Savings	Success	Success	Aug 24, 2020 at 3:29 PM	View history		21080920
		DagBank	Super Checking	Checking	Success	Success	Aug 03, 2020 at 5:57 PM	View history	xxxx3934	20011544
		DagBank	TESTDATA	Checking		Success	Aug 03, 2020 at 5:55 PM	View history	хооох3хоох	16248040
		DagBank	TESTDATA1	Savings		Success	Aug 03, 2020 at 5:55 PM	View history	xxxxx3xxxx	16248044
		Dag Site - Bank	Surendra Bank1 Sav	. Savings		Success	Aug 03, 2020 at 5:53 PM	View history	xxxx1234	16568504
		Dag Site - Bank	Super Checking	Checking		Success	Aug 03, 2020 at 5:53 PM	View history	xxxx3934	16848192
		Fast Dastas Savinas D	FastersBask	Savinan		A black on Enner (901)		Marchistory	5470	16420208
		DeeDeels	dashaali	Savings		Nisk an Error (901)		View history	0	14048004
		DagBank	dagbank	Checking		Not an Error (804)		View history	vvvv2567	29742400
		DagBankMultilauri	oaguanik	CHECKING		Oliver Error (522)		View history	AAAA3307	27743400
		Deg Bank		Savinan	Instruction Comple	USELETION (322)		View history	wu1010	25740924 14002524
		Deg Bank		Checking	Sussess			View history	AA1212	25757630 11002524
-		Dak Dalik		Checking	3000000			view history	XXX3307	27743400 11142000
										< 1 > 50/page



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

Last 40 refresh attempts		×	·
Aggregation history			(
Balance verification history	Fauure		·
• Jun 06 at 1:00 AM	Success		(
May 29 at 9:07 PM     May 23 at 1:53 AM	Success		
● May 15 at 8:40 PM	Success		

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.

f and have	← ^	ll Users	😑 ser Madhura	r <b>1</b> • Kulkarni	Net wo	orth Iy unavailable		Active Status	Apr 09 at 11 Last accessed	::35 AM	Mar 12 Account	2 at 3:12 PM t created							
2		Q Search Site name	Q	Account name	Q	Account type	Q	Verification stat Q	Refresh sta Q	Last successful refresh	<b>≑ T</b>	History	Balance	Account nu Q	Item accou Q	Transfer ac Q	Product en Q	View transactions	)
C		Dag Site		Dag Brokerage /	Acc	Brokerage Cash			Success	Yesterday at 8:34 PM		View history	\$394,738.72	8279	1112638356		Aggregation	Yesterday at 8:34 PM	
©°		Dag Site		Dag 401(k)		Employee Retire	ne		Success	Yesterday at 8:34 PM		View history	\$643,349.31	8901	1112638357		Aggregation	Yesterday at 8:34 PM	

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.



		0											I June 01	l, 2005 · .	June 10, 2020	×
÷	All Users	Madhura Kulkami	Cu Site nam	e	Account name	Account number	Item account ID	Transaction ID	CUSIP	Ticker	Description	Туре	Amount	Units	Price	@ C
	~ Q. Search		Dag Site	- Credit Card	Dag Credit Card	xxxxx9806	1112638355	2252015			LOWE'S OF H	Debit	\$188.00		\$0.00	c
	Sitename	Q Account	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252001			Audible audibl	Debit	\$15.00		\$0.00	c
	Dag Site	Dag Bro	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252006			GOOGLE *YO	Debit	\$35.00		\$0.00	c
	Dag Site	Dag 401	(k) Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252005			WWW.ITUNES	Debit	\$15.00		\$0.00	c
	Dag Site	Dag IRA	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252004			WWW.ITUNES	Debit	\$10.00		\$0.00	c
	Dag Site	Dag Cha	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252003			LINKEDIN-xxx	Debit	\$25.00		\$0.00	c
	Dag Site	Dag Cre	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252002			WWW.SHEIN	Debit	\$25.00		\$0.00	c
	Dag Site	DAG BI	Dag Site	- Credit Card	Dag Credit Card	xxxx9806	1112638355	2252016			PANERA BREA	Debit	\$50.00		\$0.00	c
	Dag Site		Dag Site	- Credit Card	Dag Credit Card	xxxxx9806	1112638355	2252018			PAYPAL *HUG	Debit	\$3.26		\$0.00	c
	DagSite	REVOC.	Dag Site	- Credit Card	Dag Credit Card	xxxx9806	1112638355	2252017			LOWE'S OF KE	Debit	\$36.00		\$0.00	c
	Dag Site	Super C	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252008			Interest Charg	Debit	\$150.00		\$0.00	c
	Dag Site	Shains	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252007			Indiegogo.com	Debit	\$90.00		\$0.00	c
	- Dag Site	Super C	Dag Site	- Credit Card	Dag Credit Card	xxxx9806	1112638355	2252020			FARMERS INS	Debit	\$420.00		\$0.00	c
	Dag Site	xxxxx345	6 Dag Site	- Credit Card	Dag Credit Card	xxxx9806	1112638355	2252019			FARMERS INS	Debit	\$420.00		\$0.00	c
	Dag Site	Dag Uni	Dag Site	- Credit Card	Dag Credit Card	x00x9806	1112638355	2252021			FARMERS INS	Debit	\$420.00		\$0.00	c
	Dag Site	Auto Pr	Dag Site	- Credit Card	Dag Charge Card	xxxx3600	1112638354	2252009			JETBLUE AIR	Debit	\$220.00		\$0.00	c

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.

	<i></i>	All Users	0	wbee	1 U	6624404 Iser's ID (Mem ID)	\$2 Bas	7,513.46 Net worth ed on latest calculation		Active Status	Mar Last a	27, 2017 at 5:27 PM ccessed	Sep 2 Accou	21, 2014 at 4:01 PM Int created	м				
â		Q Search				al 📽 😣	Bala	nce & transactions will p	opulat	te if enabled for you.								80 Service requests ~	
2		Site name C	2	Account name	Q	Account type	Q	Verification stat Q	Refn	resh status	Q	Last successful refresh 🍦 🤊	T	History	Balance	Account nu Q	Item	Active (80)	<b>3</b> 0
ß		DagBank		Super Checking		Checking		Success	🕑 Si	iuccess		Aug 26, 2020 at 6:49 PM		View history		xxxx3934	197	56496	
						~													

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.



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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

	1 active incident.											
									•	MAINTENANCE	es 🔶 incident	TS
ជា	<											>
2												÷
5								Today				7
©°	Q, Search by ID										Export	
	ID	Туре	Start date		End date		Status				6	3
	IN2003	Incident	Jul 10 at 10:30 AM				Investigatir	g				
	MN1005	Maintenance	Jul 13 at 9:00 AM		Jul 13 at 9:00 AM		Upcoming					
	MN1004	Maintenance	Jul 11 at 5:00 AM		Jul 11 at 5:00 AM		Upcoming					
	MN1002	Maintenance	Jun 26 at 1:00 PM		Jun 26 at 1:00 PM		Upcoming					

Fig. 4-33: The Status page

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

MN1175	May 13 at 2:20 PM		May 20 at 2:20 PM		Cancelled
Incident IN2003					Â
Environment Affected	Service/product affected	Impact	Status	Priority	
Production	None - This is test only	Moderate	INVESTIGATING	P3	



# Fig. 4-34: Incidents dialog box

IN2197	Nov 15, 2019 at 12:00 AM	Today at 7:10 AM	Detected
MAINTENANCE	MN1171		×
Environment Affected	Service/product affected	Impact	Status
Production	All	Intermittent Connectivity Issue	FOR YOUR INFORMATION
			ma
IN2235	May 20 at 2:27 PM	Today at 7:10 AM	Detected

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.

8 active incidents.			3 planned maintenances in progress.		
13 14 15	10	17 18 19 20	21 100ay 25 24	25 26 21	/ 28
Q. Search by ID					E+ Export
Туре	ID	Start date	End date	Status	\$
Maintenance	MN1173	May 12 at 2:15 PM	May 19 at 2:15 PM	Closed	CUSTOMIZE COLUMNS
Maintenance	MN1174	May 06 at 2:18 PM	May 20 at 2:18 PM	Extended	✓ Type
Incident	IN2233	May 13 at 2:23 PM	May 20 at 2:23 PM	Restored	Start date
Maintenance	MN1175	May 13 at 2:20 PM	May 20 at 2:20 PM	Cancelled	Status
Incident	IN2234	May 13 at 2:24 PM	Yesterday at 2:24 PM	Invalid	DISPLAY DENSITY
Maintenance	MN1170	May 13 at 2:09 PM	Yesterday at 2:09 PM	In Progress	
Incident	IN2197	Nov 15, 2019 at 12:00 AM	Today at 7:10 AM	Detected	Customize
Incident	IN2196	Nov 16, 2019 at 12:00 AM	Today at 7:10 AM	Detected	
Incident	IN2201	Feb 13 at 12:00 AM	Today at 7:10 AM	Resolved	
Incident	IN2221	Mar 30 at 4:33 AM	Today at 7:10 AM	Investigating	

Fig. 4-36: The status page settings list



# 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



# **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.



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*.

- v	Search by user												🕒 Export	+ Add one user	V Manage role per	missions
	User Q	Username	Q	Role	T	Status	τ	Last login ET	Email	Q	Work phone	User's time zone	Account	created	Last modified	4
	Admin One	Admin100061641		Admin 🗸		Active v		Jun 24 at 7:12 AM	dummy@dummy.com			(GMT+05:30) Chennal,	Jun 23 at	1:17 AM	Jun 24 at 7:12 AM	
	Admin Three	Admin100061646		Admin		Active		Today at 12:25 PM	dummy@dummy.com			(GMT+05:30) Chennal,	Jun 23 at	1:17 AM	Today at 12:25 PM	
	Admin Two	Admin100061642		Admin 🗸		Active v		Jun 23 at 1:17 AM	dummy@dummy.com			(GMT+05:30) Chennai,	Jun 23 at	1:17 AM	Jun 23 at 1:17 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	62254	Default 🗸		Active 🗸		Nov 27, 2019 at 1:54 AM	test@yodlee.com		9876598765		Nov 27, 2	019 at 1:54 AM	Nov 27, 2019 at 1:54 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	01710	Default 🗸		Active v		Nov 20, 2019 at 6:40 AM	test@yodlee.com		9876598765		Nov 20, 2	019 at 6:40 AM	Nov 20, 2019 at 6:40 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	71610	Default 🗸		Active 🗸		Nov 27, 2019 at 5:40 AM	test@yodlee.com		9876598765		Nov 27, 2	019 at 5:40 AM	Nov 27, 2019 at 5:40 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	80056	Default 🗸		Active v		Nov 28, 2019 at 3:56 AM	test@yodlee.com		9876598765		Nov 28, 2	019 at 3:56 AM	Nov 28, 2019 at 3:56 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	71539	Default 🗸		Active v		Nov 27, 2019 at 5:09 AM	test@yodlee.com		9876598765		Nov 27, 2	019 at 5:09 AM	Nov 27, 2019 at 5:09 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019120	42219	Default 🗸		Active 🗸		Dec 05, 2019 at 1:20 AM	test@yodlee.com		9876598765		Dec 05, 2	019 at 1:20 AM	Dec 05, 2019 at 1:20 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	81233	Default 🗸		Active 🗸		Nov 28, 2019 at 2:03 AM	test@yodlee.com		9876598765		Nov 28, 2	019 at 2:03 AM	Nov 28, 2019 at 2:03 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019070	31433	Default 🗸		Active 🗸		Jul 03, 2019 at 5:03 AM	test@yodlee.com		9876598765		Jul 03, 20	19 at 5:03 AM	Jul 03, 2019 at 5:03 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019070	21008	Default 🗸		Active 🗸		Jul 02, 2019 at 12:38 AM	test@yodlee.com		9876598765		Jul 02, 20	19 at 12:38 AM	Jul 02, 2019 at 12:38 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	80103	Default 🗸		Active v		Nov 28, 2019 at 4:03 AM	test@yodlee.com		9876598765		Nov 28, 2	019 at 4:03 AM	Nov 28, 2019 at 4:03 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	70044	Default 🗸		Active v		Nov 27, 2019 at 3:44 AM	test@yodlee.com		9876598765		Nov 27, 2	019 at 3:44 AM	Nov 27, 2019 at 3:44 AM	
	AUTOYCC1 AUTOYCC1	AUTOYCC12019112	11215	Default 🗸		Active v		Nov 21, 2019 at 1:45 AM	test@yodlee.com		9876598765		Nov 21, 2	019 at 1:45 AM	Nov 21, 2019 at 1:45 AM	
	AUTOYCCREGADMIN2	AUTOYCCREGADMI	N220	Default 🗸		Active v		Nov 20, 2019 at 2:48 AM	test@yodlee.com		9876598765		Nov 20, 2	019 at 2:48 AM	Nov 20, 2019 at 2:48 AM	
	AUTOYCCREGADMIN2	AUTOYCCREGADMI	N220	Default 🗸		Active v		Nov 27, 2019 at 3:44 AM	test@yodlee.com		9876598765		Nov 27, 2	019 at 3:44 AM	Nov 27, 2019 at 3:44 AM	
	AUTOYCCREGADMIN2	AUTOYCCREGADMI	N220	Default ~		Active v		Nov 21, 2019 at 1:47 AM	test@yodlee.com		9876598765		Nov 21, 2	019 at 1:47 AM	Nov 21, 2019 at 1:47 AM	

Fig. 6-2: The Permissions page

Table	6-1:	Field	descri	ption	on	Permission	i page
							1 2

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 <u>Editing User Details on page 6-3</u>
Username	Displays the username assigned to a user.
Role	<ul> <li>The customer has the option to change the role of a user if that permission has been granted.</li> <li>The default roles created by Yodlee are:</li> <li>Admin</li> <li>Default</li> <li>Each customer can create additional roles based on their organizational needs.</li> </ul>
Status	<ul> <li>The customer has the option to change the status of a user if that permission has been granted.</li> <li>The available options are: <ul> <li>Active</li> <li>Delete</li> <li>Suspend</li> </ul> </li> </ul>
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.

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.

Edit User		*Email	
		sonali.shetty@yodlee.com	
Name		Work phone	Extension
All	Product	+91 ~ 9986246255	Extension
Username:	allprodchan	"User's time zone	
Password:	Change password	(GMT+05:30) Chennal, Kolkata, Mumbal, New D	elhi ~
Last login ET:	Apr 16 at 1:54 PM	*Role	
Account created:	Apr 16 at 1:37 PM	Default	~
Last modified:	Apr 16 at 3:33 PM	*Status	
		Suspended	~
			Cancel

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 <b>Edit User</b> 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 <u>Changing the User's Password on page 6-4</u>
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.



**Chapter 6: Settings** 

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	<ul> <li>The customer has the option to change the role of a user if that permission has been granted.</li> <li>The default roles created by Yodlee are:</li> <li>Admin</li> <li>Default</li> <li>Each customer can create additional roles based on their organizational needs.</li> </ul>
Status	<ul> <li>The customer has the option to change the status of a user if that permission has been granted.</li> <li>The available options are: <ul> <li>Active</li> <li>Delete</li> <li>Suspend</li> </ul> </li> </ul>

#### Table 6-2: Edit User dialog box fields

#### 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 <u>Editing User Details on page 6-</u><u>3</u>.

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.

00 V			
Change passw	ord		
Password must be at least 8 chara	ters and include at least one:		
- Lowercase letter - Numeric digit	- Uppercase letter - Special character ! @ # \$ % ^ & + = () *		
*Password			
Password	8	R	
*Confirm password			
Confirm password	8	R	

*Fig.* 6-4: *Change Password dialog box* 



**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**.

														I
		Search by user									🕒 Export	+ Add one user 🗸 🚺	Manage role permissions	
ជ		User Q	Username Q	Role	T	Status	T	Last login ET	Email Q	Work phone	User's time zone	Account created	Last modified	
0		<script>alert()</script>	<script>alert()</script>	Default 🗸		Active 🗸		Nov 30, 2017 at 9:59 PM	csvtest-1@gdssecurity.c	212-555-1234		Nov 30, 2017 at 9:59 PM	Nov 30, 2017 at 9:59 PM	
5		a <script></script>												

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.

	<ul> <li>Search by user</li> </ul>							Export	+ Add one user 🗸 M	lanage role permissions
G	User Q	Username O	Role T	Status <b>T</b>	Last login ET	Email Q	Work phone	User's time zone	Account created	Last modified
9	<script>alert()</script>	<script>alert()</script>	Default 🗸	Active 🗸	Nov 30, 2017 at 9:59 PM	csvtest-1@gdssecurity.c	212-555-1234		Nov 30, 2017 at 9:59 PM	Nov 30, 2017 at 9:59 PM
5	a <script></script>									

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.



**Chapter 6: Settings** 

X																
	Q. Search by user													B+ Export	+ Add one user 🗸	Manage role permission
പ്പ	User	Q	Username	Q	Role	T	Status	T	Last login ET	T	Email	Q	Work phone $ {\bf Q} $	User's time zone 🛛 🜱	Add one user	Last modified
0	AdminRegistration1	397	AdminRegistratio	on1397	Test 🗸		Active 🗸		Apr 15, 2014 at 11:	28 P	bvt@yodlee.com				Bulk register users	Apr 15, 2014 at 11:28
-	Raj shetty		raj.s		Custom ro	le 🗸	Active 🗸		May 05 at 12:21 PM	И	sonali.shetty@yodlee.	com	+91 99862 46	(GMT-11:00) Samoa	May 02 at 6:10 PM	May 05 at 12:21 PM
5	Sonali Custom		sonalicustom		Custom ro	le 🗸	Active 🗸		Yesterday at 4:25 P	м	sonali.shetty@yodlee.	com		(GMT-07:00) Chihua	May 08 at 2:57 PM	Yesterday at 4:25 PM
۵:														Records per pag	se 50 100 200 <	1/35 >

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**.

Register Oser			Email	
Name			*Confirm email	
First	Last		Confirm email	
Username			Work phone	Extension
Username		@yodlee	+1 VWork phone	Extension
Password			"User's time zone	
Password		Z	User's time zone	~
Confirm password			*Role	
Confirm password		Z	Select role	$\sim$

Fig. 6-8: The Register User dialog box

Table 6-3: Field	description	on Register	User	dialog	box
	1	5		5	

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 <b>Password</b> 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.



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

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

## 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.

	Q. Search by user												B+ Export	+ Add one user 🗸	Manage role permission
<b>ଜ</b>	User	Q	Usemame	Q	Role	T	Status	T	Last login ET	T	Email Q	Work phone Q	User's time zone	Add one user	Last modified
0	AdminRegistration13	397	AdminRegistration	1397	Test 🗸		Active 🗸		Apr 15, 2014 at 11:28	P	bvt@yodlee.com			Bulk register users	Apr 15, 2014 at 11:28
-	Raj shetty		raj.s		Custom role	• •	Active 🗸		May 05 at 12:21 PM		sonali.shetty@yodlee.com	+91 99862 46	(GMT-11:00) Samoa	May 02 at 6:10 PM	May 05 at 12:21 PM
5	Sonali Custom		sonalicustom		Custom role	• •	Active 🗸		Yesterday at 4:25 PM		sonali.shetty@yodlee.com		(GMT-07:00) Chihua	May 08 at 2:57 PM	Yesterday at 4:25 PM
۵:													Records per pag	e 50 100 200 <	1/35 >

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

To add users in bulk using bulk registration workflow

 On the Permissions page, select +Bulk Register User from the drop-down list. The Drag and Drop or browse dialog box is displayed.

	×
A Download template for bulk user registration	
Drag and drop or <b>browse</b>	
Please upload up to 1 attachment(s) up to 15 MB total. Accepted file types are: xlsx	
Upload and Regis	ter

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.


- 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.

😁 Roles	Permissions		× Users
Add new role	SENSITIVE		Move users to this role
Duplicate selected role	Networth	0	← Move selected users to default role
⊖ Delete selected role	DASHBOARD		
Users are moved to default role and remain active	Customers	0	Q. Search
Admin	Accounts	0	2
Default	Fastlink engagement	0	Abdul Baba (ababa)
	SERVICE REQUESTS	Ľ	Abha Saxena (asaxena1) 24
	Support groups	Ľ	Abinaya Durairaj (abinaya)
	CUSTOMERS	0	Aditi Singh (asingh8)
	Account status	ď	Admin Eeight (Admin100000042)
	Activate, deactivate, suspend & delete accounts		Admin Nine (Admin100000043)
	Customer status Activate, deactivate, suspend & delete customers	Ľ	Admin Seven (Admin100000041) 20
	Los Into ann ac customore	~	at
u singno Admin v Acc	tive V Jun 17 at 200 PM asingnogyopice.	com 565	Done at Done a

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:



### 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.



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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 <u>Introduction on page 5-</u> $\underline{1}$ .

#### 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 <u>Customer Selection - Blue Bar on page 7-5</u>

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.

Table 6-4: List of My Yoalee Permissio
--



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 mean page is entirely hidden. View means the page and SR details can be but no service requests can be created or edited. Edit means all of 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.

## Table 6-4: List of My Yodlee Permissions



Chapter 6: Settings

### 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.



	Session time out				
ାଡ	Auto close resolved service requests	4 v hours	0 V minutes		
5	Password expiration	60 v days			
:	Password expiration notification	10 ~ days			
	Deactivate user due to inactivity	60 V days			
	Replace iconic mark Upload un SVG, PNG or JPG file wit than SMB.	h similar height and width th	at is less	Yodlee	Replace full lockup Upload an SVG, PNG or JPC file that is wider than tall and is less than SMB.
ନ୍ତ					
A					
>					

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



# 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

Y	odlee		
ជ	DASHBOARD		
ଡ଼ା	SUPPORT	~	
5	CLASSIC		
©°	SETTINGS	~	
	REPLAY FEAT	URES	
S	QUESTIONS?		
()	MY ACCOUNT	i i	
<	CLOSE		

Fig. 7-1: My Account on menu



ŝ	C→ Sign out ∂ Change password		Email subscriptions
Ø	은 Upload Photo		Service requests
6	Work phone	Extension	Created by me
-5	✓ Mobile number	Extension	<ul> <li>Assigned to me</li> </ul>
638			Assigned to my group
624	Name		Following
AIIA	Admin Eelght		Sites
	Username		All users receive emails on Yodlee
	Admin100000042		maintenances and incidents.
	Email		
	test@yodlee.com		
	Role		
	Admin		
$\triangleright$			
	Support groups		
8	None		
A			
>			

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-dowr 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 <b>My Yodlee</b> application.	

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

- 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.





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

- 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

- Click **My Account** or the **My Account** icon in the left navigation menu. The **My Account** page is displayed.
- 2. Click Change Password.



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

	~	1
Champer	~	quest
Change password		d by
		ed to
Password must be at least 8 characters and include at least one:		ed to
Lowercase letter     Vumeric digit     Uppercase letter     Special character		1g
Old password		
		e en
		I
Change password		

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.



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

	Viewing: YISandboxNXT V					
	Q. Search					8 Customize dashboard
ଜ	All customers					
8	VISandboxNXT All : Data : augnxt (Private)	⊕ @ ×	Open - Last 30 Days III	⊕® ×	Open - Last 5 Days	⊕ © ×
5	s concur (Private)		2			

*Fig.* 7-7: *Customer selection blue bar* 



# 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



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.



# 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.



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# 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.



### 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.

