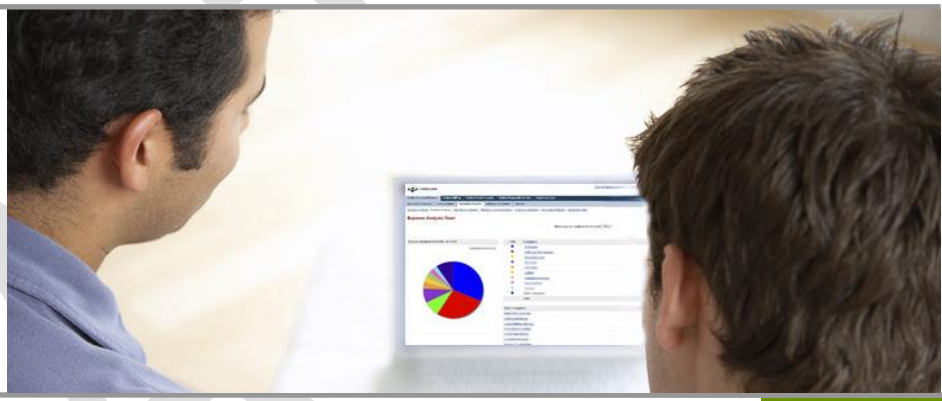


Yodlee MoneyCenter

User Interface Cobrand Development Kit

2010

Version 10.0

DRAFT

Yodlee Confidential

1 Objective 4
2 Instructions 4
3 Global Changes 5
3.1 Basic Page Structure 5
3.2 Application Layout Elements 6
3.3 Page Error and Success Message Handling 7
3.4 Navigation 7
3.4.1 Primary Navigation - Tabs 7
3.4.2 Navigation – MENUS 8
3.5 FinApp Tray 9
4 Global FinApp Properties 11
4.1 FinApp Layout 11
4.2 FinApp Filter Properties 16
4.3 FinApp Dropdown Menus 18
4.4 FinApp Forms 19
4.5 FinApp Expanded Panes 21
4.6 Embedded FinApps 22
4.7 FinApp Tables 23
4.8 FinApp Text Links 24
4.9 FinApp Buttons 25
4.10 Gutter Space 26
5 Floaters 26
6 Financial Calendar 28
7 Budget 30
8 Goals 33
9 Spending Charts 35
10 Beta Promotional Floater 37

Yodlee, Inc. © Copyright 2010 Confidential

Copyright (c) 2010 Yodlee®, Inc. All rights reserved. Technology protected by one or more U.S. Patents or Patents Pending. Use subject to license terms. May include materials developed by third parties. Yodlee and the Yodlee Logo are trademarks or registered trademarks of Yodlee, Inc. in the U.S. and other countries. All other trademarks mentioned in this document or Website are the property of their respective owners.

Revision History

Date	Revision	Description	Author	Reviewer
06/18/2009	1.0	Initiated/Created document	Mike Daley	
07/12/2009	1.1	Updated the following sections 7 Budget, 8 Goals	Mike Daley	
01/23/2010	1.2	Copyright, Objectives section FinApp gutter space, new floaters, Financial Calendar	Roopa Malavally, Sudha Tayya	

1 Objective

Purpose of this document is to capture design (visual) details to customize the Yodlee MoneyCenter products with the below items. While most of the general elements are applicable for all of Yodlee's products, some of these are specific to a product line. For example, charts are only applicable for Personal Finance. Please refer to product description documents for more information on features supported in each of the product lines.

1. Basic Page Structure
2. Application Layout Elements
3. Page Error and Success Message Handling
4. Navigation
    a. Primary Navigation – Tabs
    b. Navigation - Menus
5. FinApp Tray
6. FinApp Properties
    a. Layout
    b. Filter Properties
    c. Dropdown Menus
    d. Forms
    e. Expanded Panes
    f. Embedded FinApps
    g. Tables
    h. Text Links
    i. Buttons
    j. Gutter Space
7. Floaters
8. Financial Calendar
9. Spending Charts
10. Beta Promotional Floater

2 Instructions

- Provide colors in hexadecimal values. For example: #003399
- The field should be left blank in order to use default values
- For images, provide the name of the image (e.g, sample.gif) and send the images in a separate email.
- Recommended values are safe to use as they have been tested thoroughly in several environments.
- It is recommended to use font sizes in pixels.

Yodlee, Inc. © Copyright 2010 Confidential

3 Global Changes

3.1 Basic Page Structure

The following snapshot shows the basic page structure for the 10x release. The page is structured to support 318px and 646px FinApps and users will be able to drag and drop FinApps into different content slots.

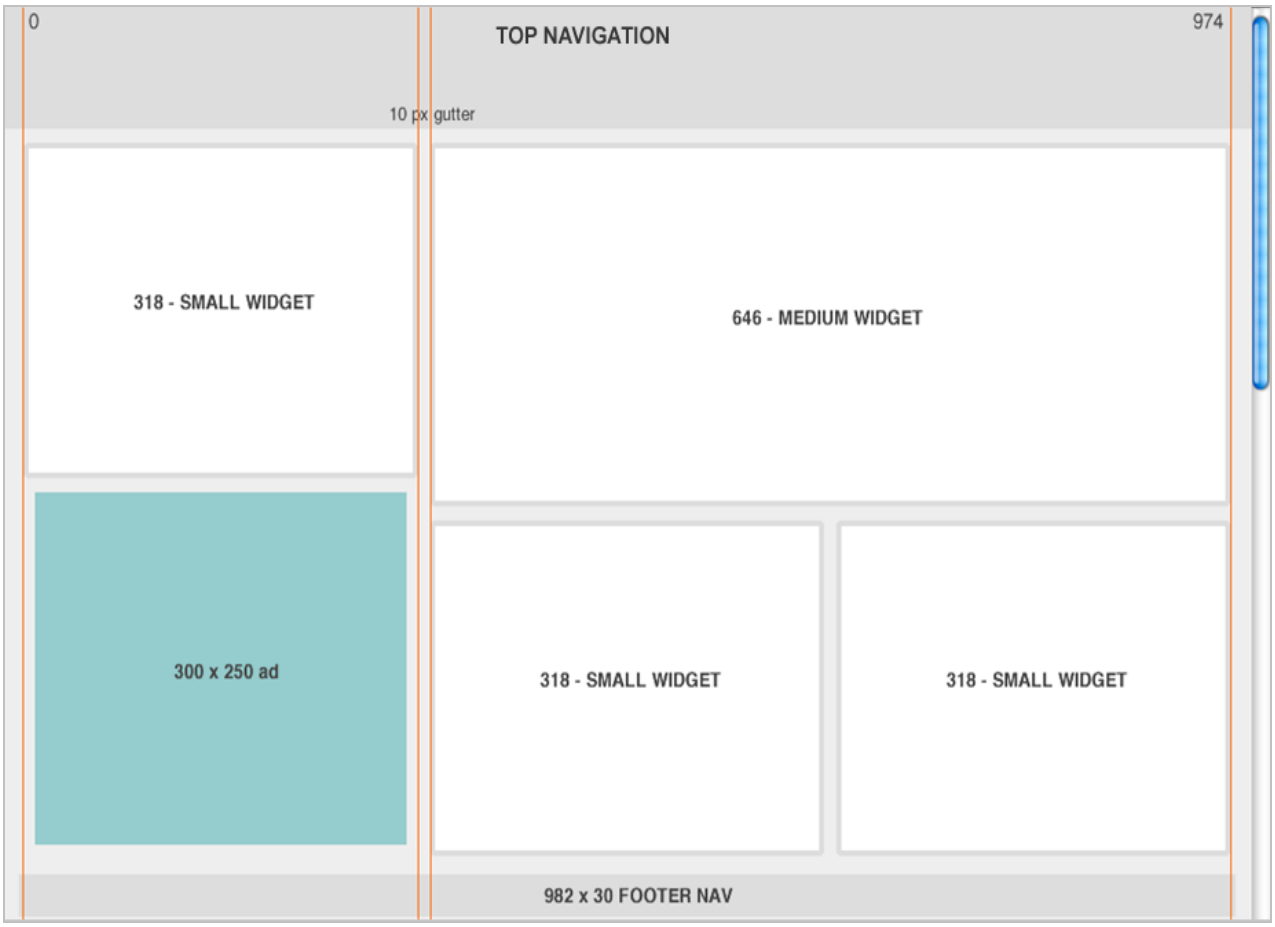


Figure 1: Yodlee MoneyCenter 10x basic page structure.

Select the number of columns for the application based on the width available using the table below.

Element Name	Description	Instructions	Default	Customer Preference

Yodlee, Inc. © Copyright 2010 Confidential

Page columns	The number of columns available on a page	**Enter a value based on the width of Cobrands page:** **Page Width (pixels)** — **Columns** 622 < width <= 975 — 2 975 > width <= 1303 — 3 1303 < width — 4	**Recommended:** See table	

3.2 Application Layout Elements

The section below captures the details for application width, header file, footer file, primary text color, primary font type, and primary font size.

Element Name	Description	Instructions	Default	Customer Preference
Application Background	The background of the application.	Choose a very light shade of any color, however white is recommended due to the strong contrast it provides against dark-colored text.	#FFFFFF **Recommended:** #FFFFFF (white)	
Primary Text Color	This is the default text color for all pages of the PersonalFinance application.	To specify a color other than the default, enter a browser-safe hexadecimal color code or one of the 16 predefined colors (red, white, blue, etc.). Any darker shade of black color is highly recommended, because it gives a good contrast with a light page background color.	#444444 (dark grey) **Recommended:** Darker shade of any color, especially black	
Primary Font Type	This is the font type used throughout the application.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** font-family: Arial, Helvetica, sans-serif;	
Primary Font Size	This is the default font size applied to the application text.	The font size is fixed in pixels and it.	Font-size:11px; **Recommended:** 1) Default	
Header File	The custom header appears at the top of all the PersonalFinance pages	Create a header file per the instructions in the PersonalFinance Supplement and send it to Yodlee.	N/A	
Footer File	The custom footer appears at the bottom of all the PersonalFinance pages	Create a footer file per the instructions in the PersonalFinance Supplement and send it to Yodlee.	N/A	

Yodlee, Inc. © Copyright 2010 Confidential

3.3 Page Error and Success Message Handling

The section captures page level error and success messaging

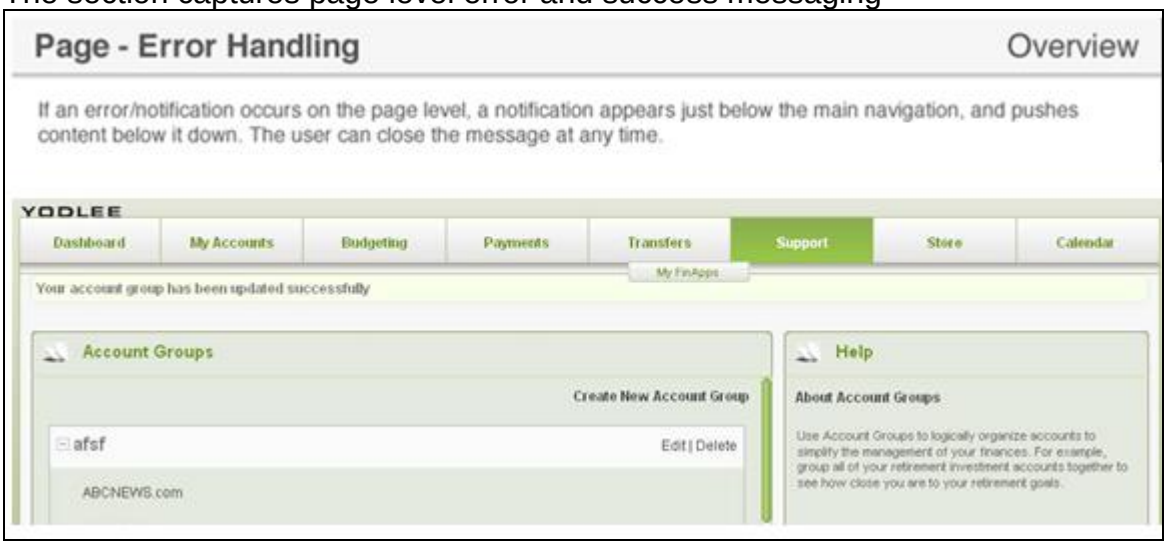


Figure 2: Page Error and Success Messages

Message Type	Element Name	Style Values	Customer Preference
Error	Header	Font Size Font Color Background Color	
	Content	Font Size Font Color Background Color	
Success	Header	Font Size Font Color Background Color	
	Content	Font Size Font Color Background Color	

3.4 Navigation

3.4.1 PRIMARY NAVIGATION - TABS

The section below captures the design (visual) details for primary navigation - tabs.

Yodlee, Inc. © Copyright 2010 Confidential

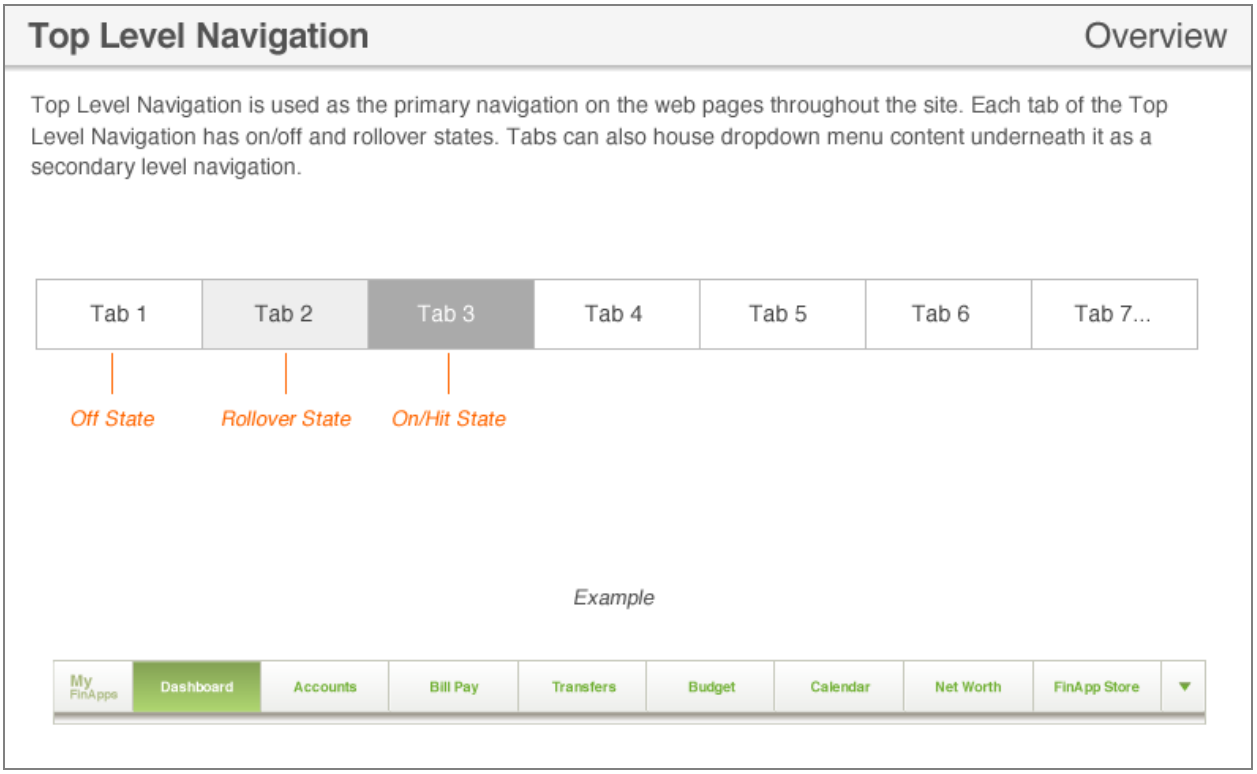


Figure 3: Top level navigation

Element Name	Style Values	Customer Preference
Active Main Tab	Font Color Background Color/Image	
Non Active Main Tab	Font Color Background Color/Image	
Main Tab – Mouseover	Font Color Background Color/Image **Recommended:** The state used for Active Man Tab (Label a)	
Rounded Corners for Tabs (For supported browsers)	*Rounded Corners (yes/no)	

3.4.2 NAVIGATION – MENUS

Yodlee, Inc. © Copyright 2010 Confidential

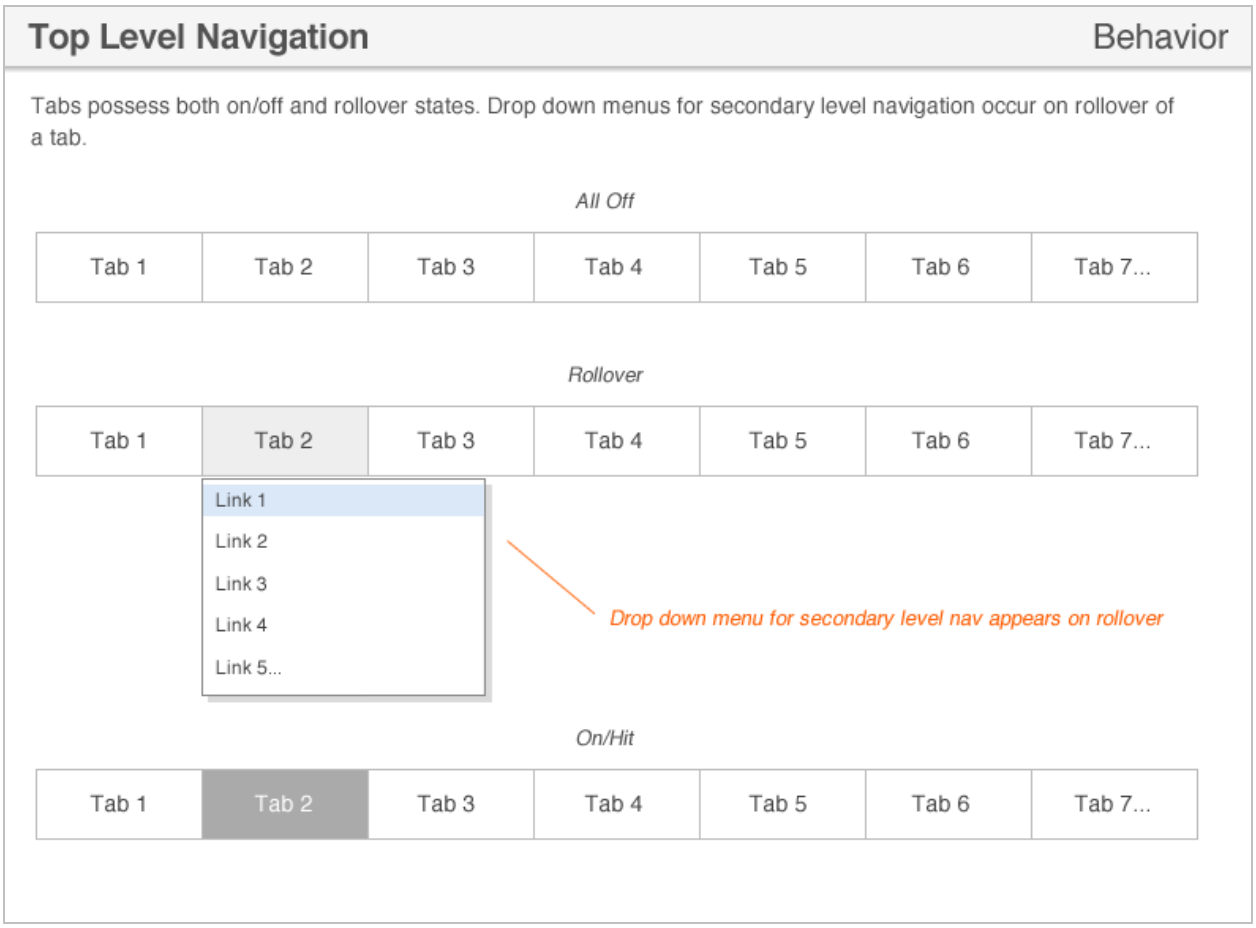


Figure 4: Top level dropdown menus

Element Name	Style Values	Customer Preference
Fly out Menu Background	Background Color	
Fly out Menu Font	Font Color *Font Size	
Fly out Menu Border and	Border	
Background Color - Mouse over	Background Color	
Horizontal Separator	On and Off Font Color	

3.5 FinApp Tray

The FinApp Tray is used to drag FinApps onto an existing page in the application.

Figure 5: FinApp Tray

Yodlee, Inc. © Copyright 2010 Confidential

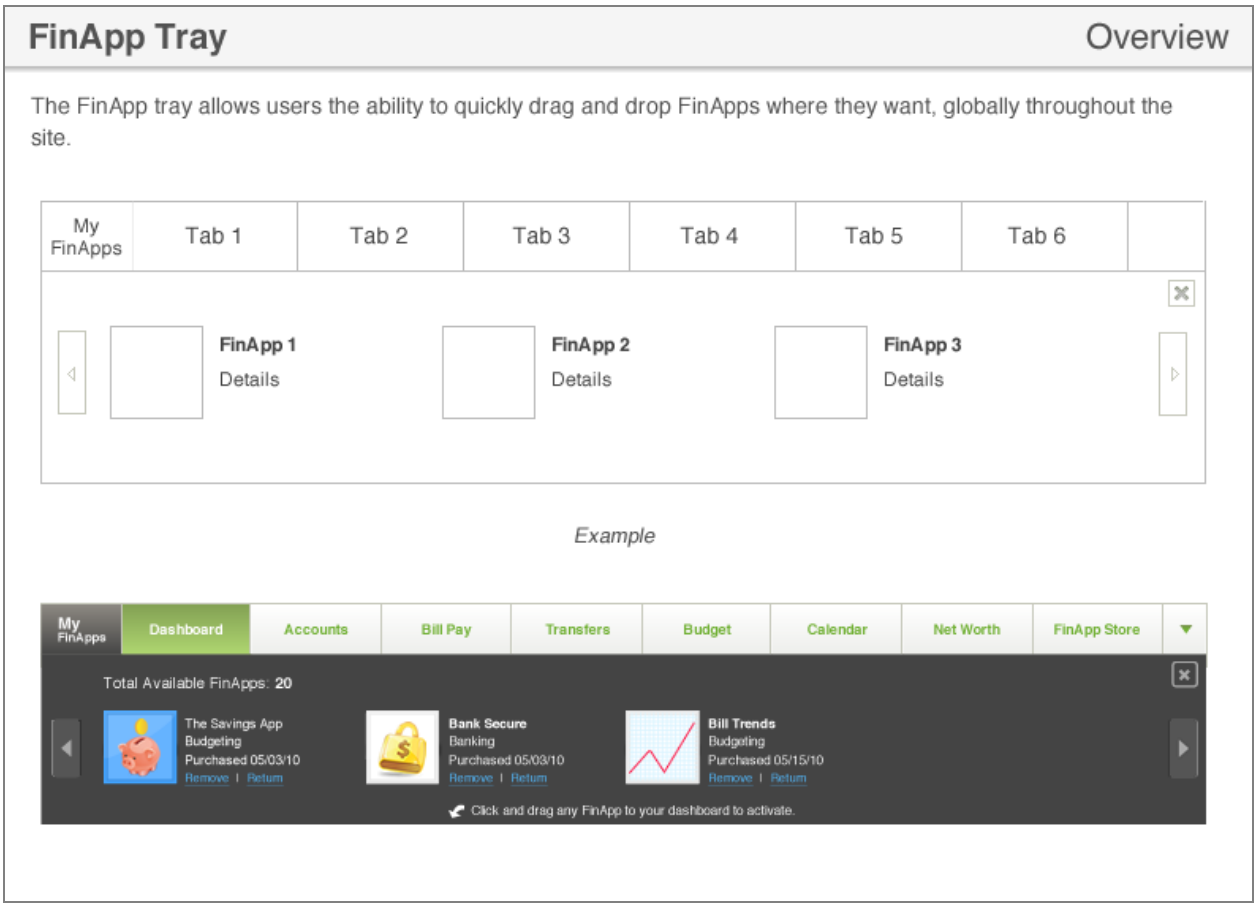


Figure 6: FinApp Tray

Element Name	Description	Instructions	Default	Customer Preference
FinApp Tray Background	The background of the FinApp Tray.	Choose a background color that will contrast with the available FinApps and the font.	#000000 **Recommended:** #000000 (black)	
FinApp Tray Primary Text Color	This is the default text color for FinApp Tray	To specify a color other than the default, enter a browser-safe hexadecimal color code or one of the 16 predefined colors (red, white, blue, etc.). A color that will provide contrast with the background color is recommended,	#FFFFFF (white) **Recommended:** #FFFFFF (white)	
FinApp Tray Primary Font Type	This is the font type used in FinApp Tray. It will default to the primary font type if not defined.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** font-family: Arial, Helvetica, sans-serif;	

Yodlee, Inc. © Copyright 2010 Confidential

FinApp Tray Primary Font Size	This is the font size used in FinApp Tray. It will default to the primary font size if not defined..	The font size is fixed in pixels and it.	Font-size:11px; **Recommended:** 1) Default	

4 Global FinApp Properties

This section defines the global FinApp properties that will be shared by all FinApps in the application.

4.1 FinApp Layout

FinApps are available in two sizes, 318px and 646px and conform to the following standards:

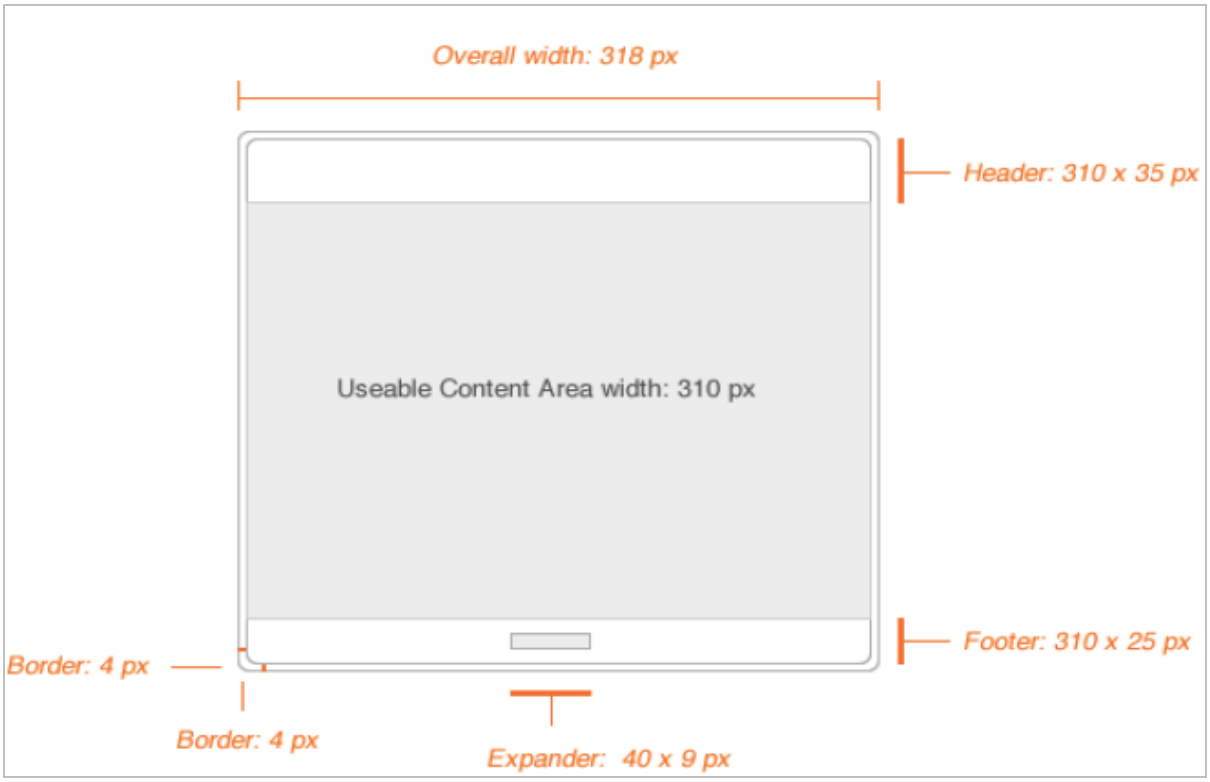


Figure 7: 318px FinApp

Yodlee, Inc. © Copyright 2010 Confidential

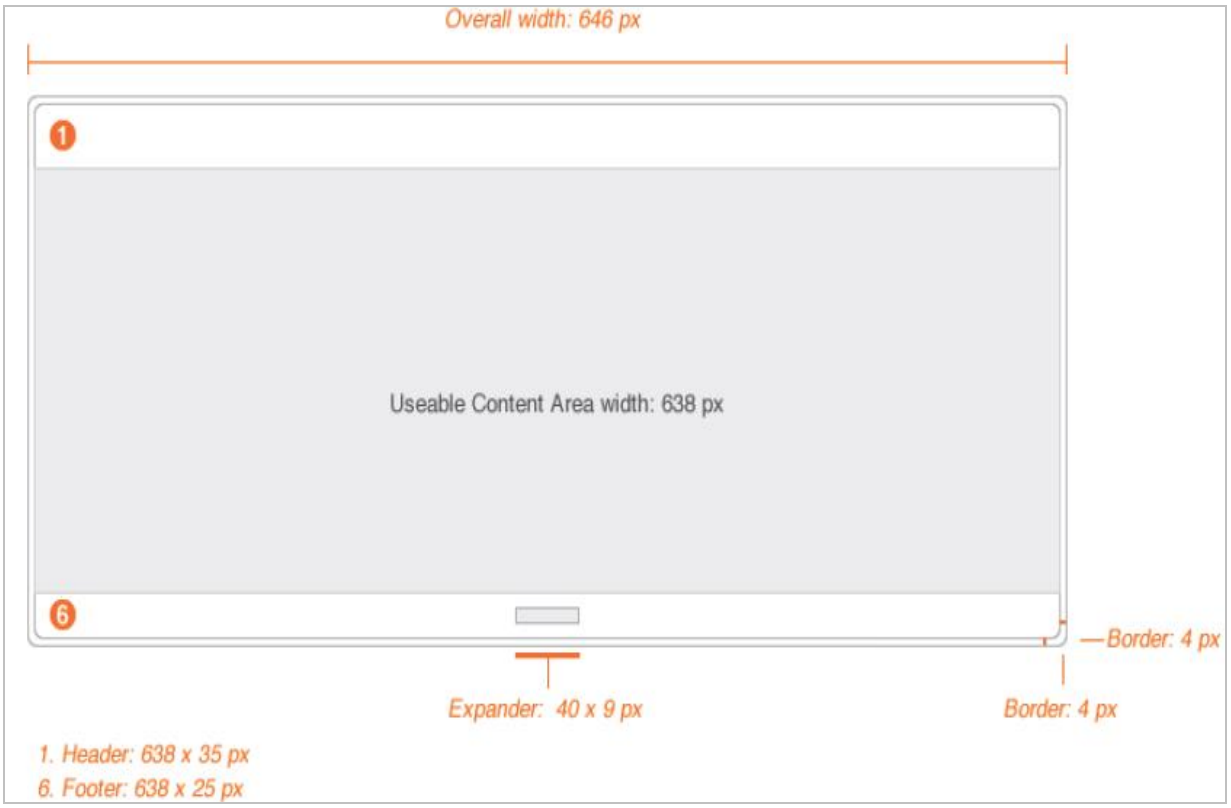


Figure 8: 646px FinApp

Element	Description	Instructions	Default	Customer Preference
FinApp Header Image	Background image for all FInApp headers	Choose a background image for all FinApp headers, see Figure 9: 318px FinApp Background Image Specs and Figure 10: 646px FinApp Background Image Spec		
FinApp Header Background	Background color of the FinApp header	Choose a very light shade of any color, however white is recommended due to the strong contrast it provides against dark-colored text.	#FFFFFF **Recommended:** #FFFFFF (white)	
FinApp Header Control Icons	Icons to control minimize, close, and redirect to page	Select a 22x22px icon or accept the default icons	see Figure 11: FinApp Header Control IconsFigure 11: FinApp Header Control Icons	
FinApp Header Text Color	Text color for all FinApp header text	Choose text color for all FinApp headers		

Yodlee, Inc. © Copyright 2010 Confidential

FinApp Header Font Type	This is the font type used throughout the application.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** Same as primary font type	
FinApp Header Font Size	This is the default font size applied to the application text.	The font size is fixed in pixels	Default: 11px **Recommended:** 1) Default	
FinApp Content Background Image	Backgound image for all FinApp content areas	Choose a background image for the content area of all FinApps, see Figure 9: 318px FinApp Background Image Specs and Figure 10: 646px FinApp Background Image Spec		
FinApp Footer Background Image	Background image for all FinApp footers	Choose a background image for the footer of all FinApps, see Figure 9: 318px FinApp Background Image Specs and Figure 10: 646px FinApp Background Image Spec		
FinApp Footer Background	Background color of the FinApp footer	Choose background color for all FinApp footers. Recommended to be the same as FinApp header background		
FinApp Footer Text Color	Text color for the FinApp footer	Choose text color for all FinApp footers. Recommended to be the same as the text for FinApp headser		
FinApp Footer Font Type	This is the font type used throughout the application.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** Same as primary font type	
FinApp Footer Font Size	This is the default font size applied to the application text.	The font size is fixed in pixels	Default: 11px **Recommended:** 1) Default	
Primary FinApp Text Color	This is the default text color for all pages of the	To specify a color other than the default, enter a browser-safe hexadecimal color code or one of the 16 predefined colors	#444444 (dark grey)	

Yodlee, Inc. © Copyright 2010 Confidential

	PersonalFinance application.	(red, white, blue, etc.). Any darker shade of black color is highly recommended, because it gives a good contrast with a light page background color.	**Recommended:** Same as primary font color	
Primary FinApp Font Type	This is the font type used throughout the application.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** Same as primary font type	
Primary FinApp Font Size	This is the default font size applied to the application text.	The font size is fixed in pixels	Default: 11px **Recommended:** 1) Default	

Table 1: FinApp Layout Properties

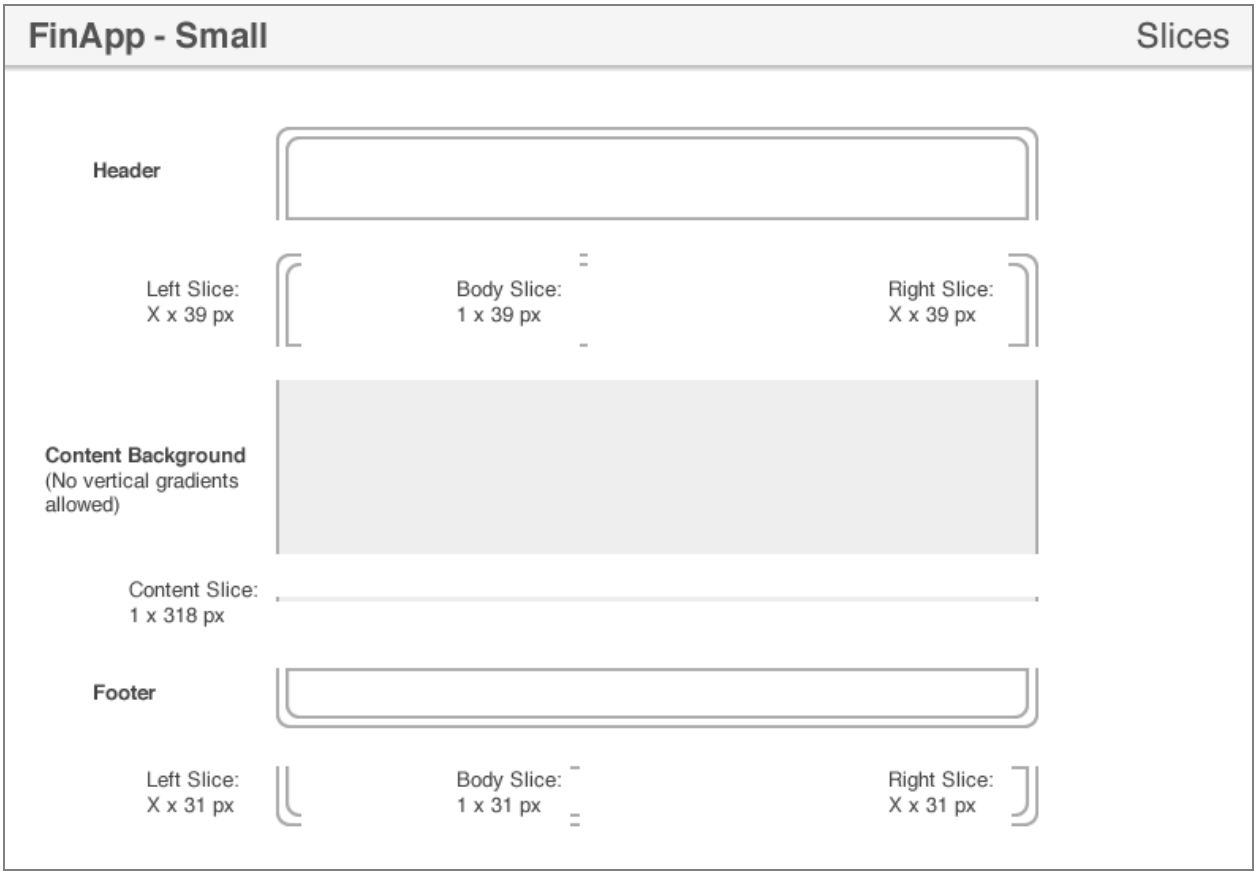


Figure 9: 318px FinApp Background Image Specs

Yodlee, Inc. © Copyright 2010 Confidential

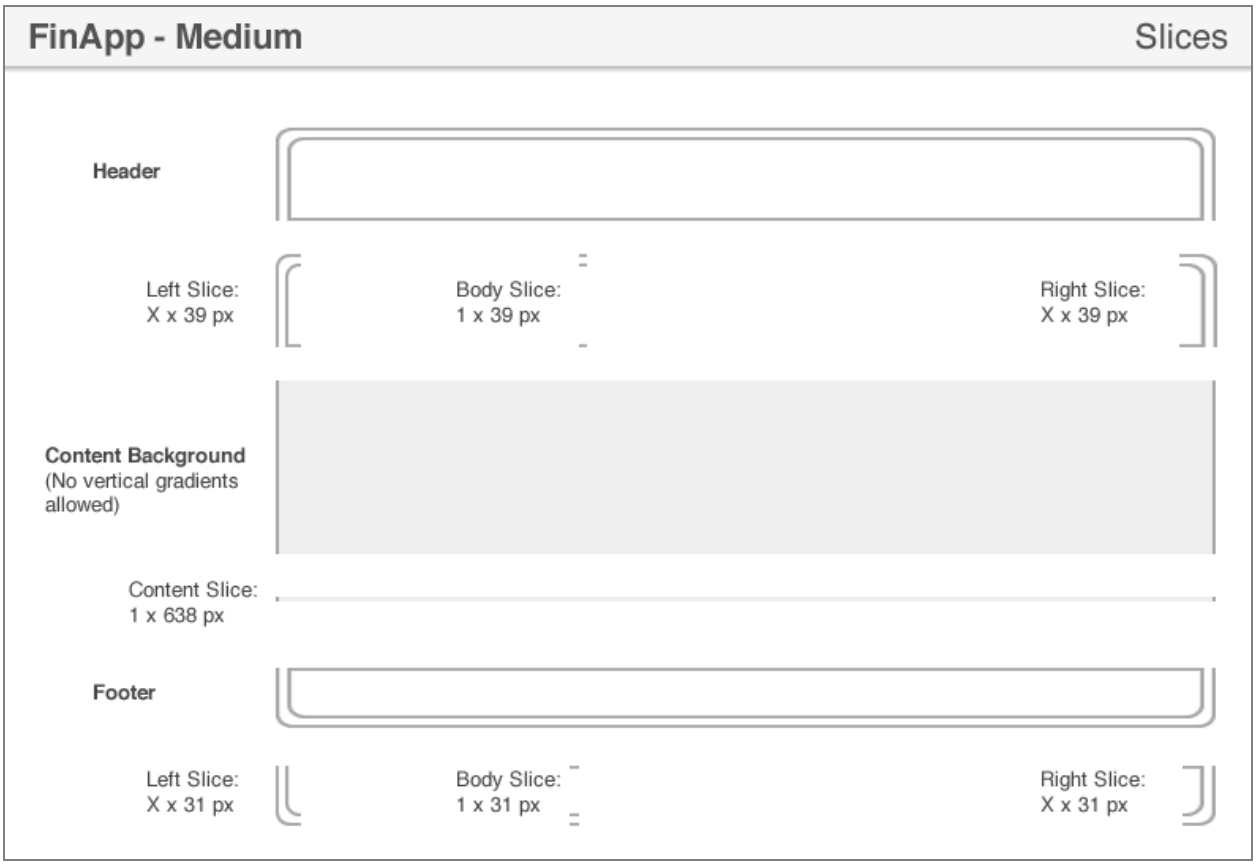


Figure 10: 646px FinApp Background Image Spec

Yodlee, Inc. © Copyright 2010 Confidential

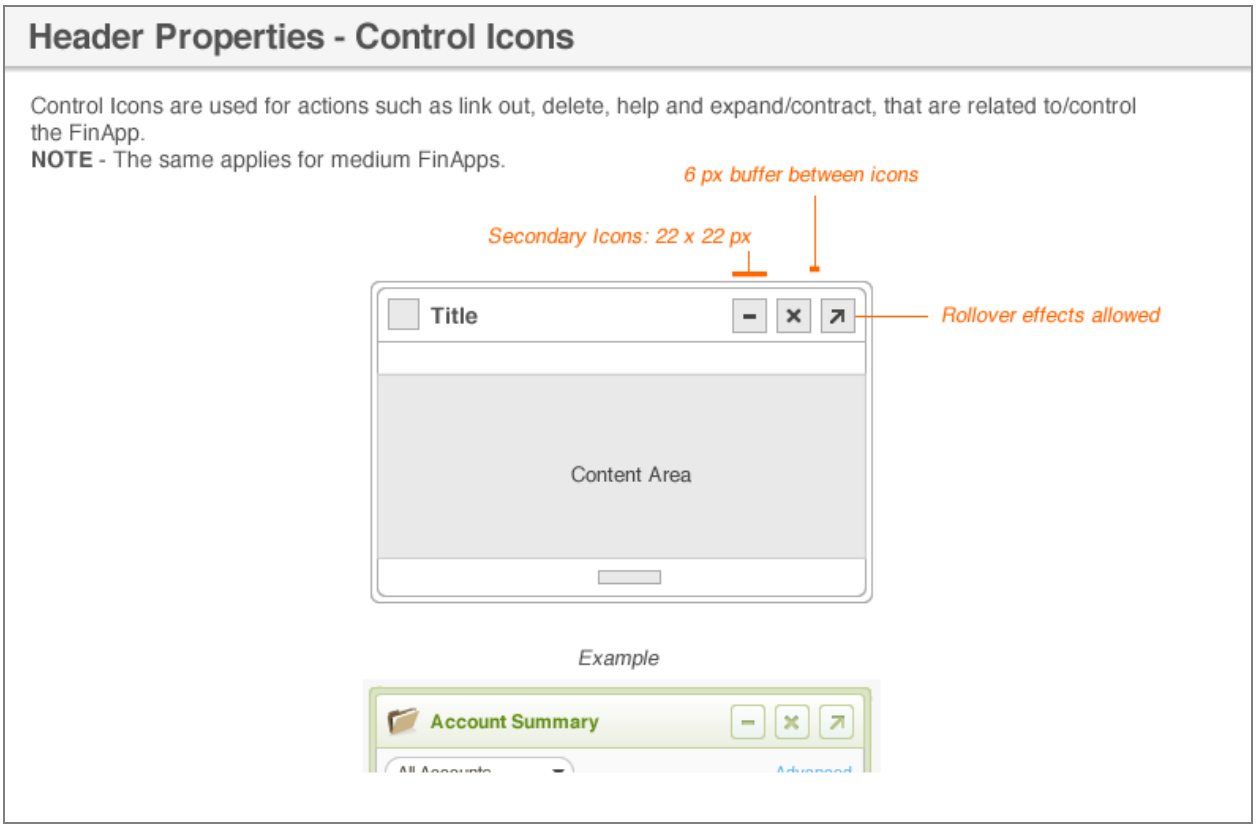


Figure 11: FinApp Header Control Icons

4.2 FinApp Filter Properties

FinApps can have default filters and advanced menu filters this section details the configurable properties for the FinApp filters.

Yodlee, Inc. © Copyright 2010 Confidential

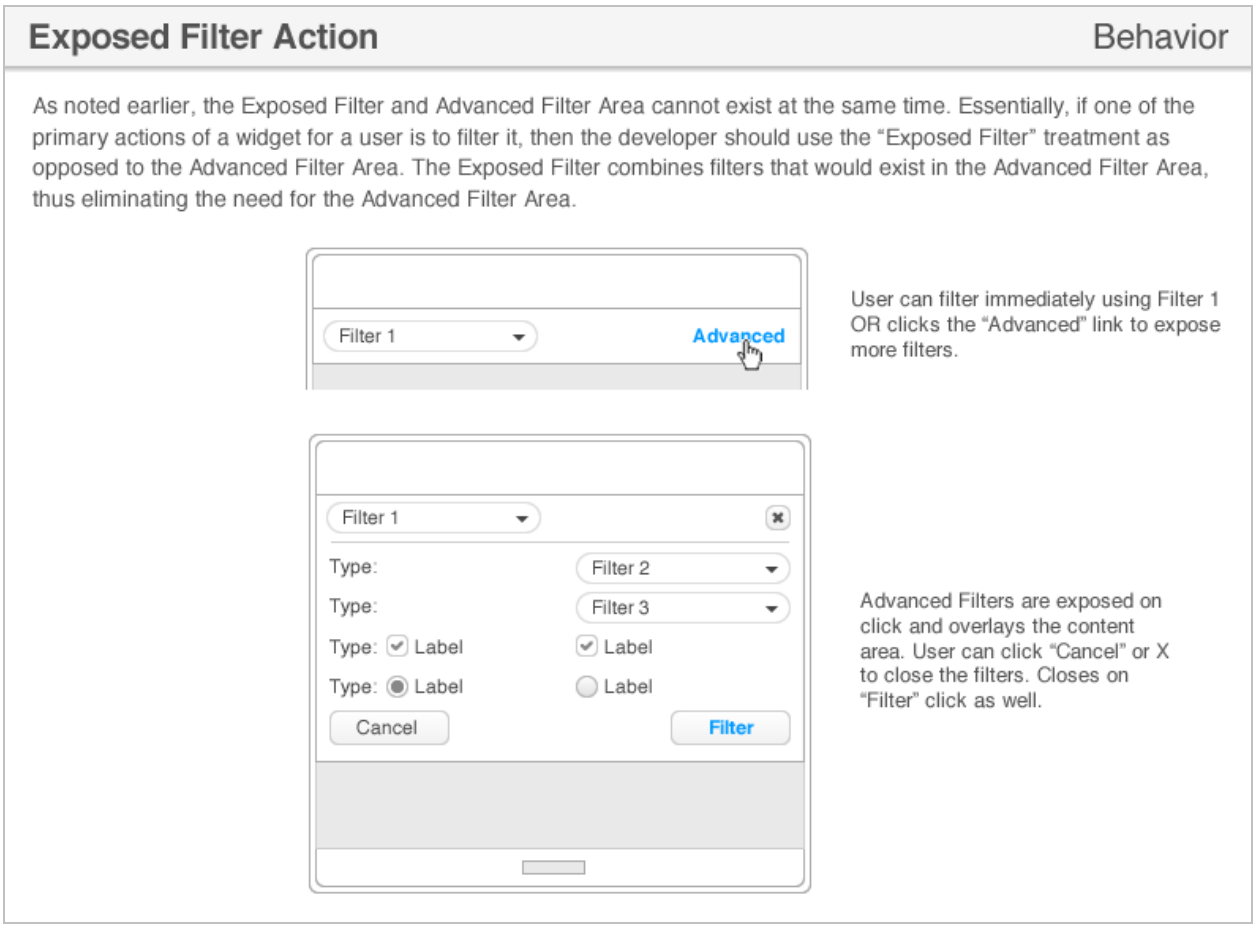


Figure 12: FinApp filters

Element	Description	Instructions	Default	Customer Preference
FinApp Filter Background	Background color of the FinApp advanced filter	Choose a very light shade of any color, however white is recommended due to the strong contrast it provides against dark-colored text.	#FFFFFF **Recommended:** #FFFFFF (white)	
FinApp Filter Text Color	Text color for the FinApp footer	Choose text color for all FinApp footers. Recommended to be the same as the text for FinApp headser		
FinApp Filter Font Type	This is the font type used throughout the application.	Enter three fonts by order of importance. They must be separated by commas with no spaces. The first font type entered is the default font type used by the application, with the second and third type used as backup options if the user's machine does not support the specified first or second fonts.	font-family: Arial, Helvetica, sans-serif; **Recommended:** Same as primary font type	

Yodlee, Inc. © Copyright 2010 Confidential

FinApp Filter Font Size	This is the default font size applied to the application text.	The font size is fixed in pixels	Default: 11px **Recommended:** 1) Default	

4.3 FinApp Dropdown Menus

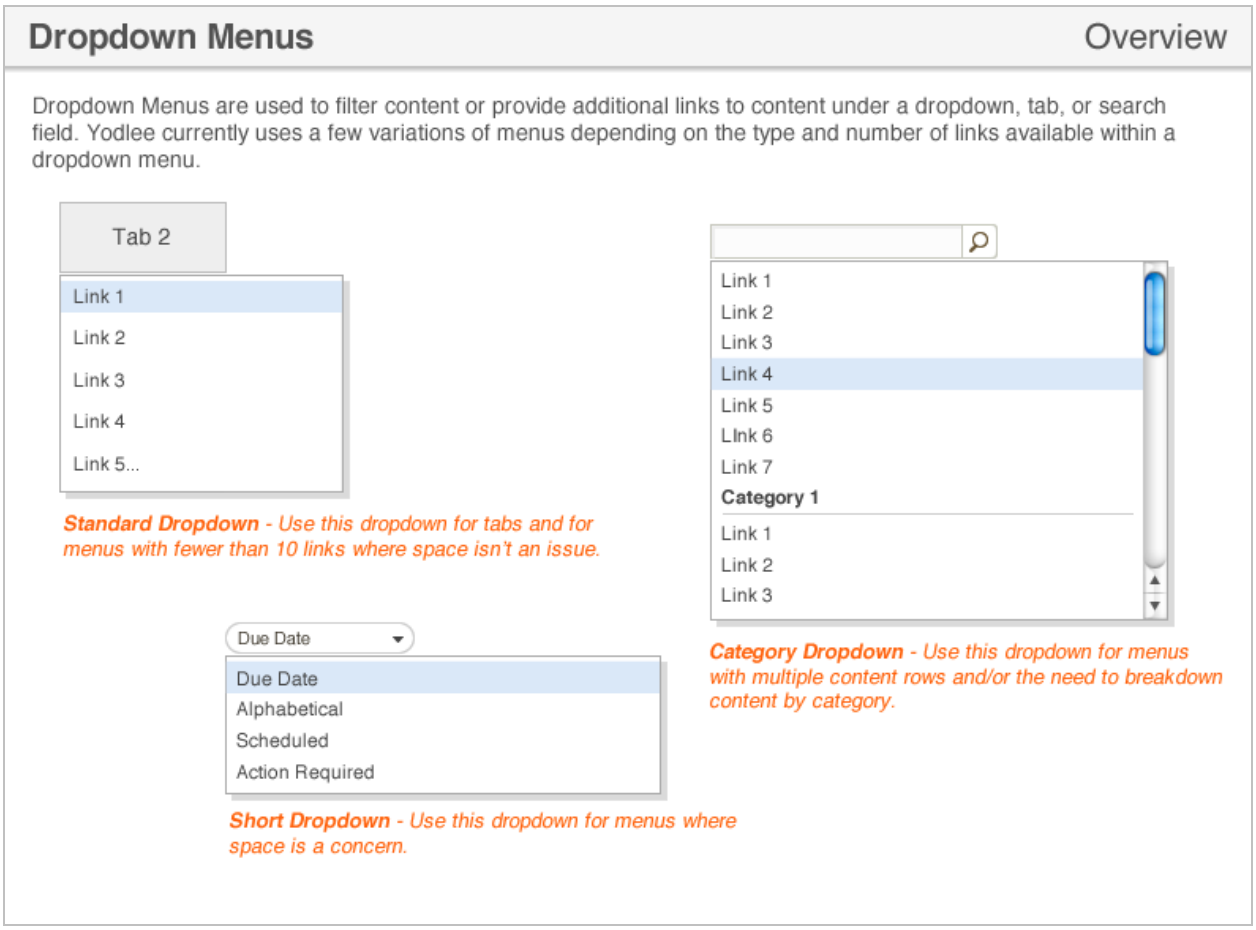


Figure 13: FinApp dropdown menus

Element Name	Style Values	Customer Preference
Rollover list highlighted background color	Font Color Background Color/Image	
Rollover list background color	Font Color Background Color	

Yodlee, Inc. © Copyright 2010 Confidential

4.4 FinApp Forms

The section below captures the design (visual) details for error handling in FinApp forms. Forms will use the FinApp content properties

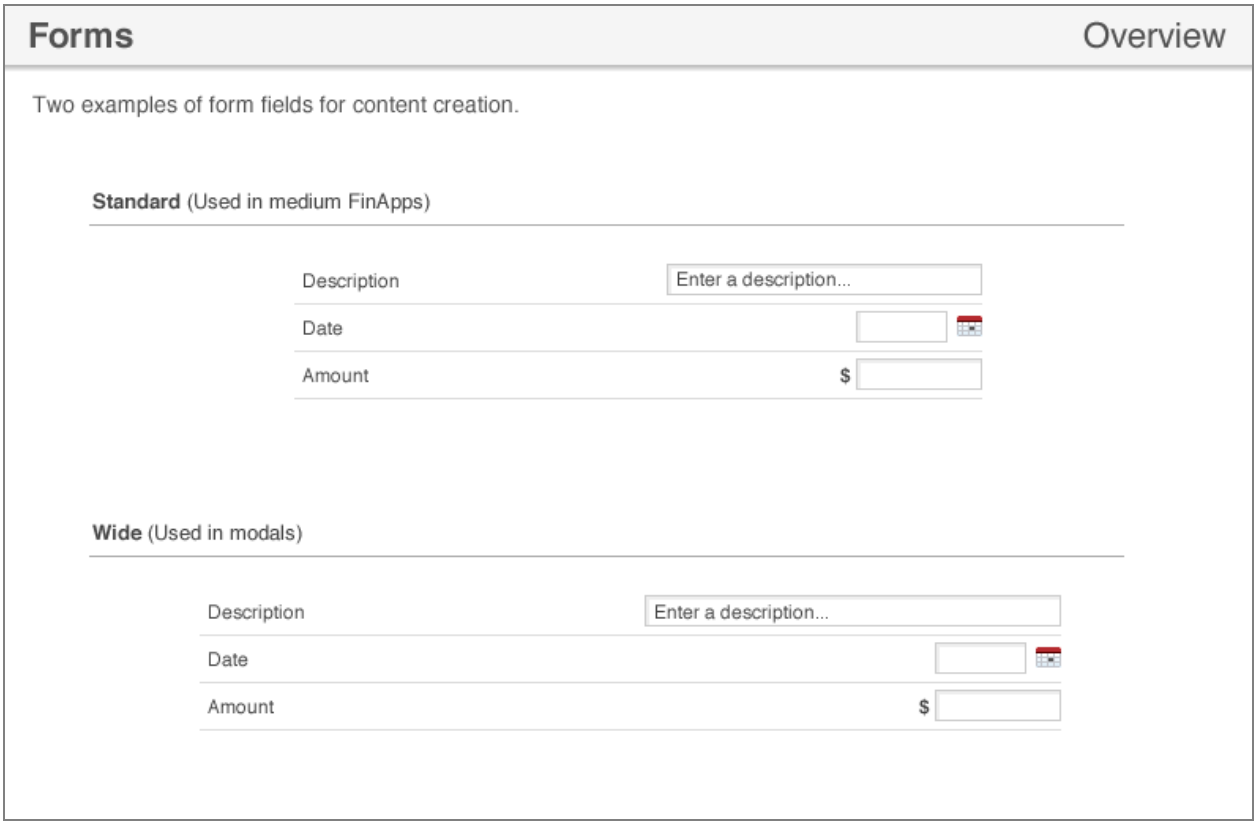


Figure 14: FinApp Forms

Yodlee, Inc. © Copyright 2010 Confidential

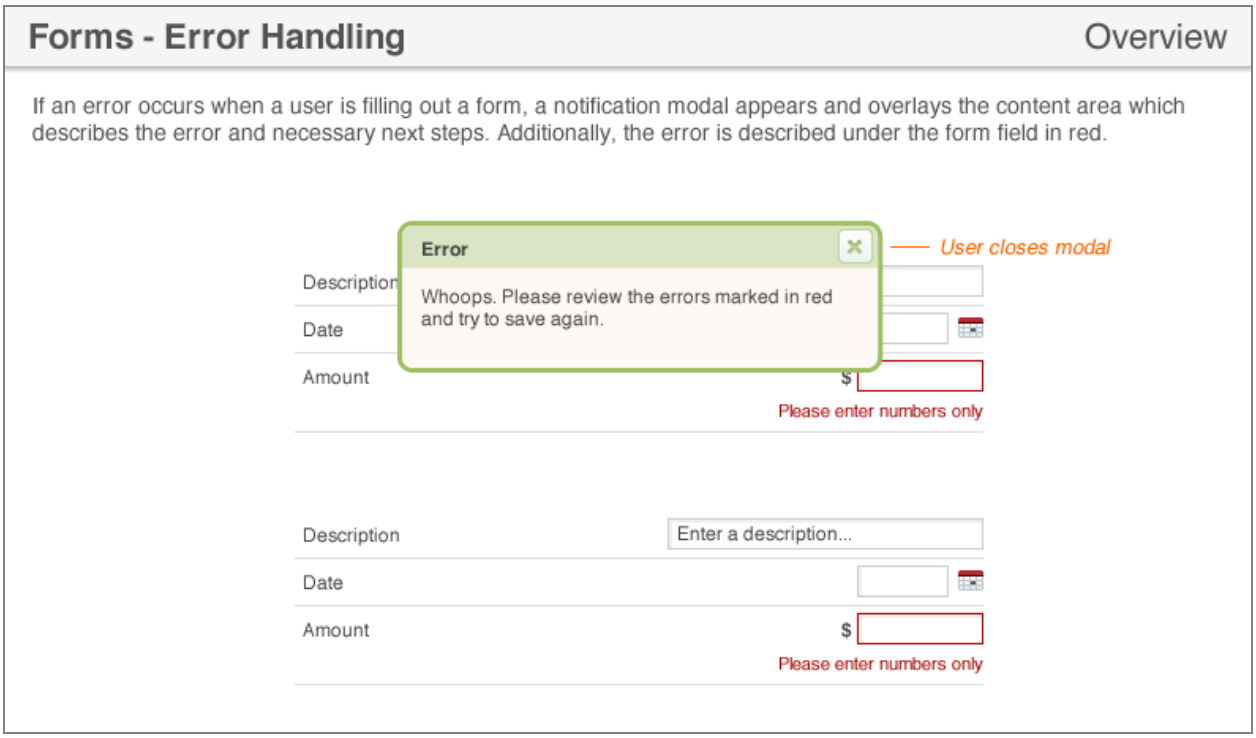


Figure 15: Form Error and Success Messaging

Message Type	Element Name	Style Values	Customer Preference
Error	FinApp Error	Font Color/Size Background Color Border Color	
	Form Field Error	Border Color Font Color/Size	
Success	FinApp Success Message	Font Color/Size Background Color Border Color	

Yodlee, Inc. © Copyright 2010 Confidential

4.5 FinApp Expanded Panes

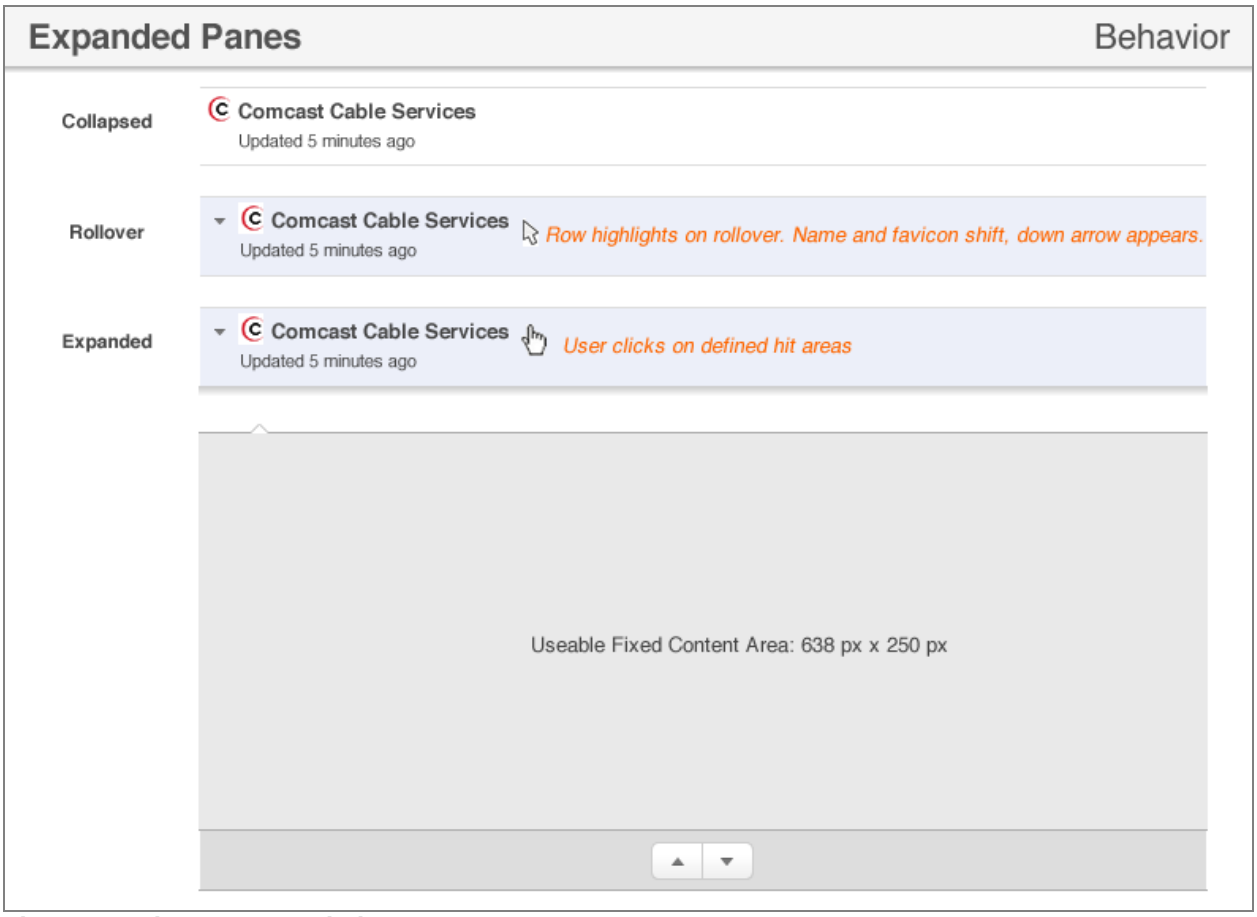


Figure 16: FinApp Expanded Pane

Element Name	Style Values	Customer Preference
Pane Collapsed Icon	Icon/None by Default	
Pane Expanded Icon	Icon	
Pane Rollover	Background Color	
Pane Selected	Background Color	

Yodlee, Inc. © Copyright 2010 Confidential

4.6 Embedded FinApps

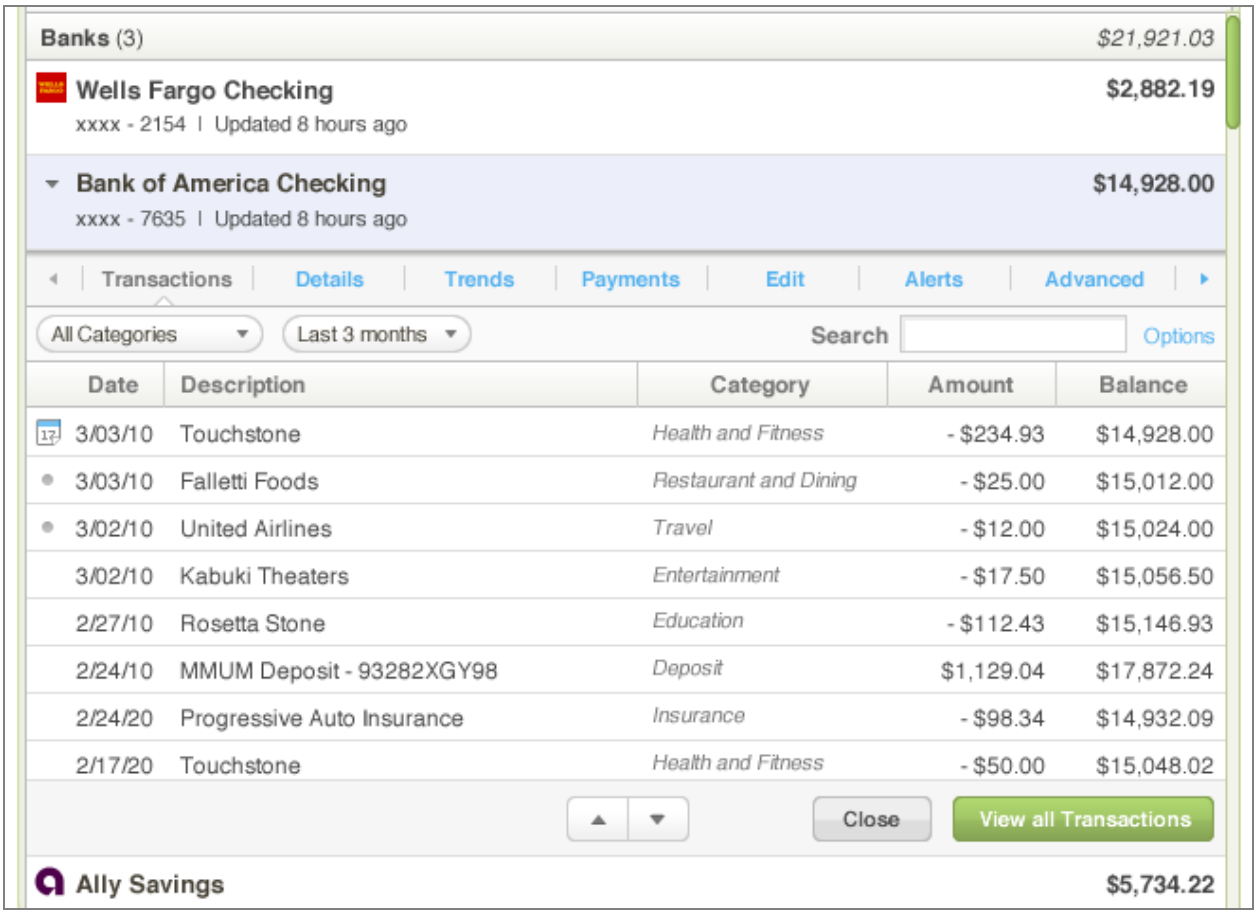


Figure 17: Embedded FinApps

Element Name	Style Values	Customer Preference
Non Active Sub Tab	Font Color Background Color/Image	
Active Sub Tab	Font Color Background Color/Image	
Rollover Sub Tab	Font Color Background Color/Image	

Yodlee, Inc. © Copyright 2010 Confidential

4.7 FinApp Tables

Figure 18: FinApp Tables

Element Name	Style Values	Customer Preference
Table Border	Border Color	
Table Header	Font Color Background Color/Image	
Table Header – Sorted By	Font Color Background Color/Image	
Even Row	Font Color Background Color	
Odd Row	Font Color Background Color	
Highlighted Row	Font Color Background Color	
Table Footer	Font Color	

Yodlee, Inc. © Copyright 2010 Confidential

	Background Color/Image	

4.8 FinApp Text Links

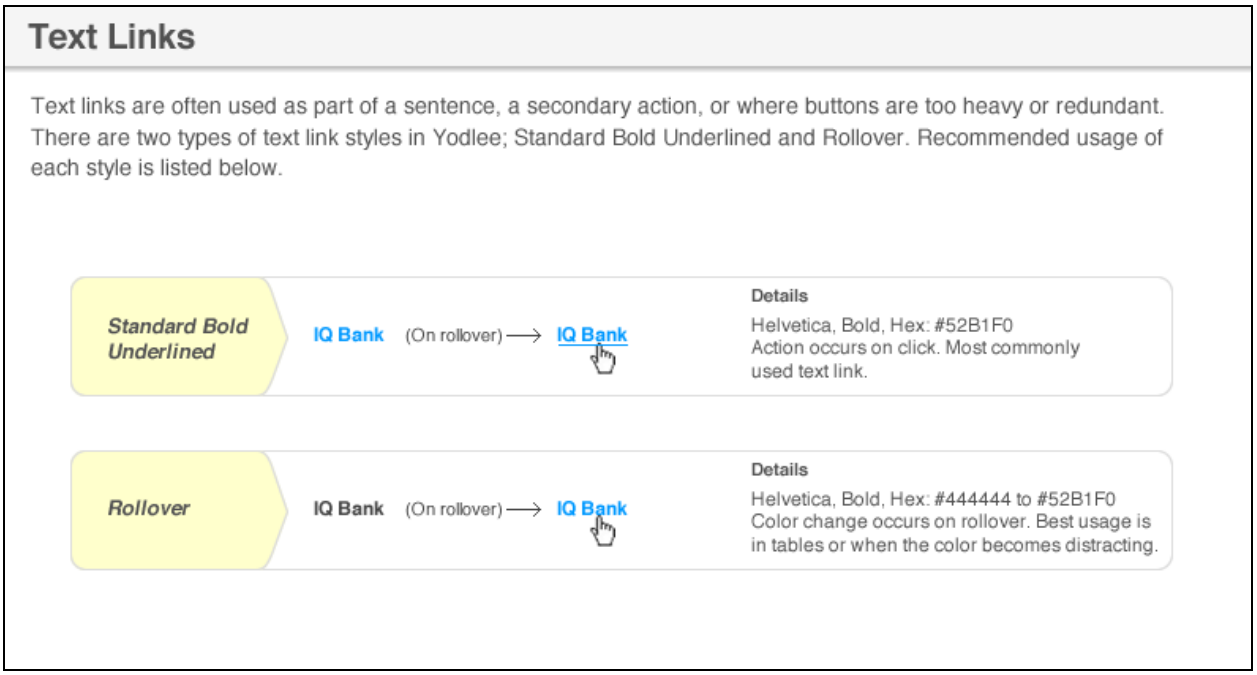


Figure 19: FinApp Text Link Properties

Element Name	Style Values	Customer Preference
Link	Font Color/Size Font Decoration: Underline/Bold	
Link Hover	Font Color/Size Font Decoration: Underline/Bold	
Link Selected	Font Color/Size Font Decoration: Underline/Bold	
Link Visited	Font Color/Size Font Decoration: Underline/Bold	

Yodlee, Inc. © Copyright 2010 Confidential

4.9 FinApp Buttons

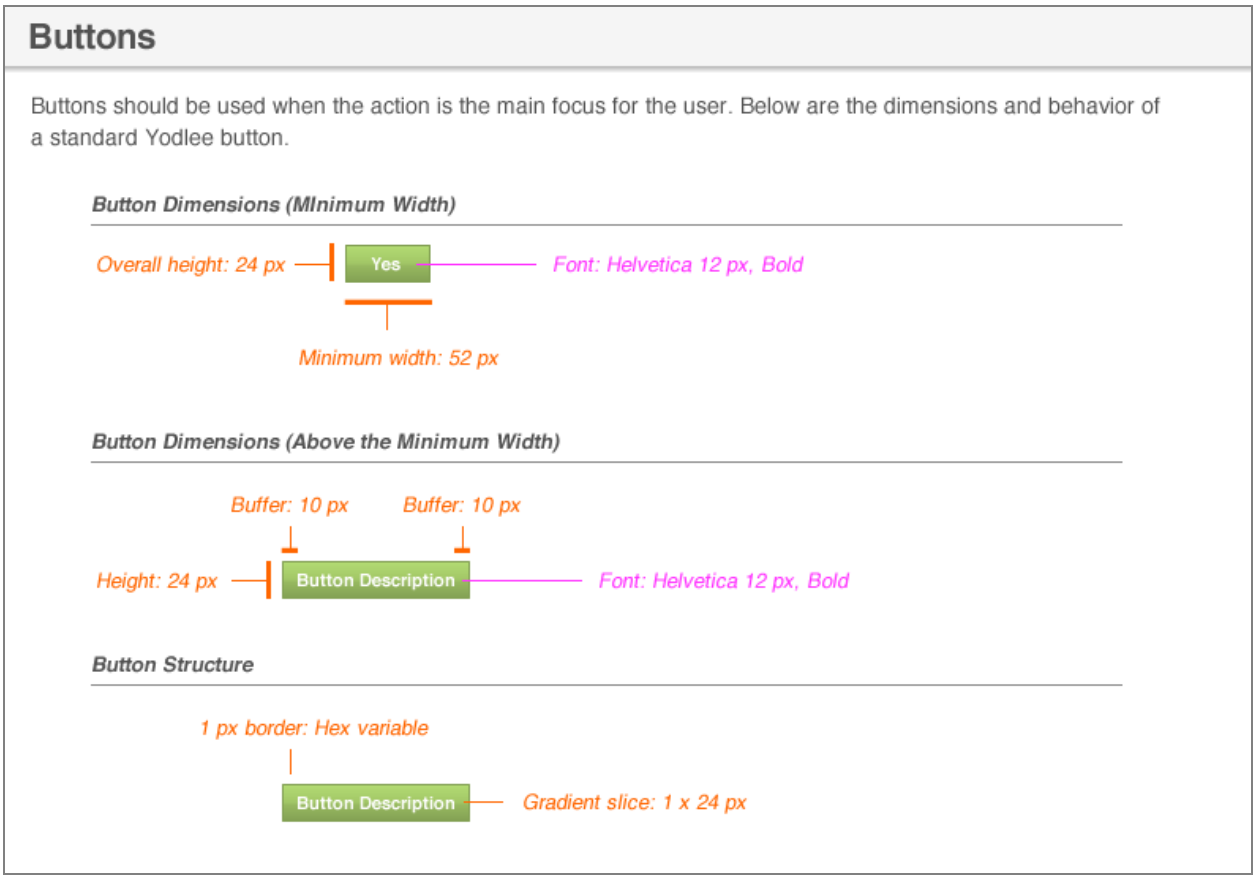


Figure 20: FinApp Buttons Properties

Element Name	Style Values	Customer Preference
Button	Font Color Background Color/Image	
Button Hover	Font Color Background Color/Image	
Button Selected	Font Color Background Color/Image	

Yodlee, Inc. © Copyright 2010 Confidential

4.10 Gutter Space

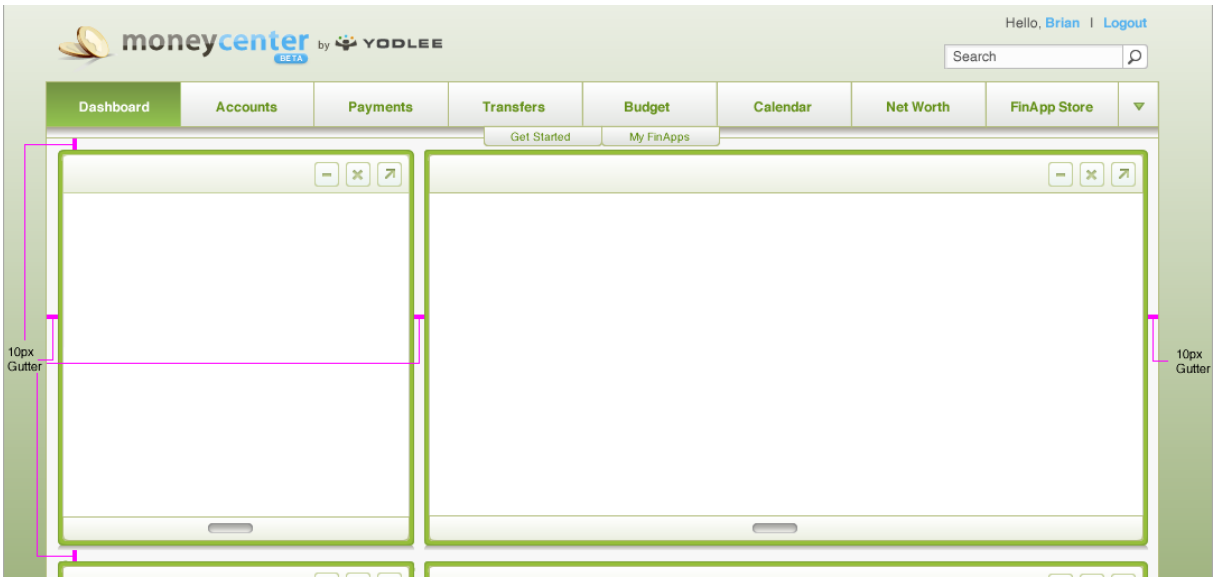


Figure 21 FinApp Gutter Properties

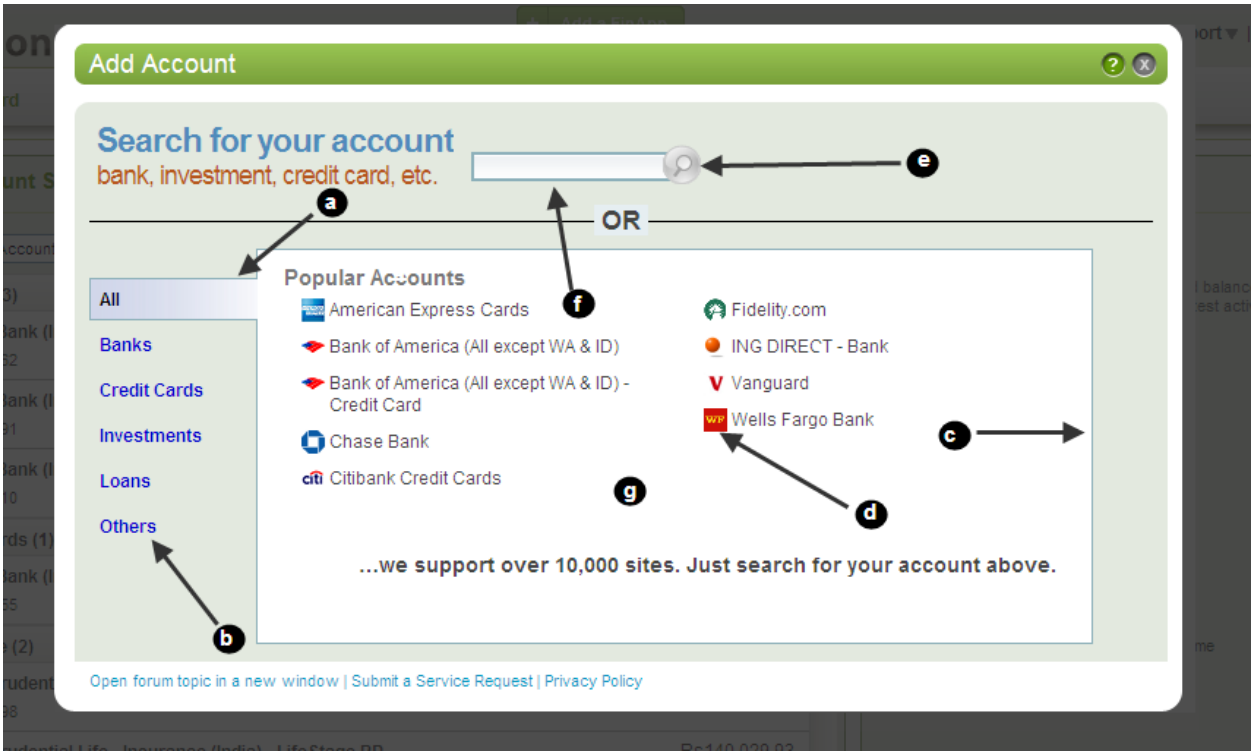
5 Floaters

Floaters are used for "process funnels" - user-tasks which require the user to submit information without interruption for completing a task successfully.

For floaters, underlying page is grayed out (transparent page) and non-accessible (all links disabled).

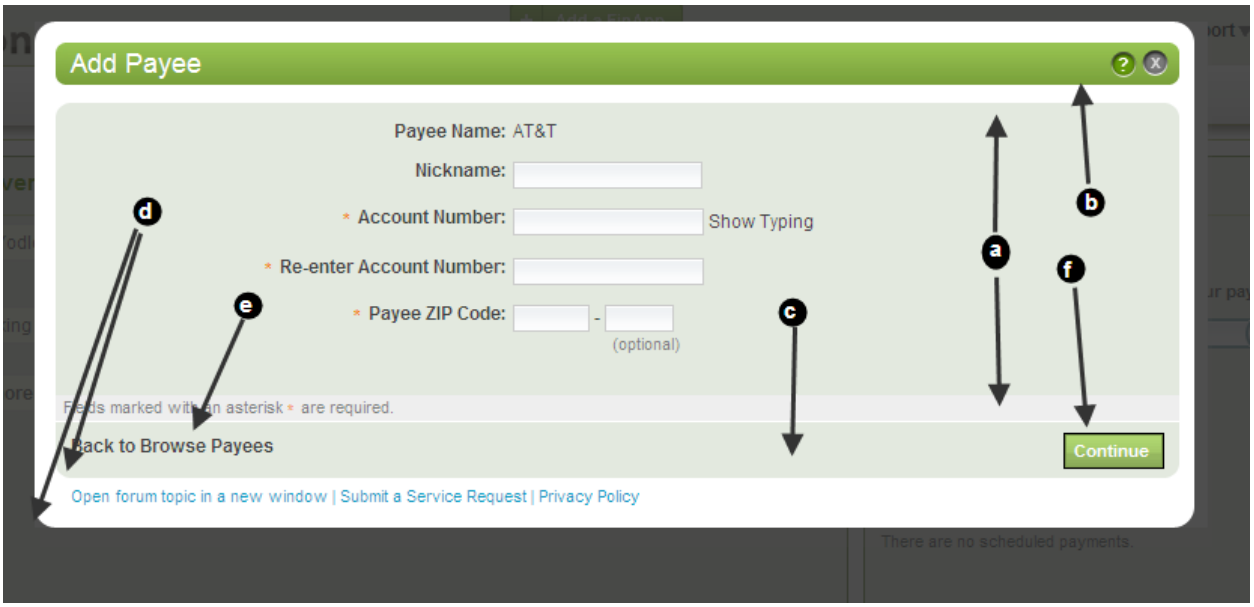
The section below captures the design (visual) details for floaters.

Yodlee, Inc. © Copyright 2010 Confidential



Label	Element Name	Style Values
a	Floater - Active Tab	Background Color Font Color
b	Floater – Non Active Tab	Background Color Font Color
c	Floater – Tabs Module Border	Border Color
d	Image – Placeholder Favicon	Image
e	Image – Search Button	Image
f	Image – Search Text Field	Border
g	Body	Background color

Yodlee, Inc. © Copyright 2010 Confidential



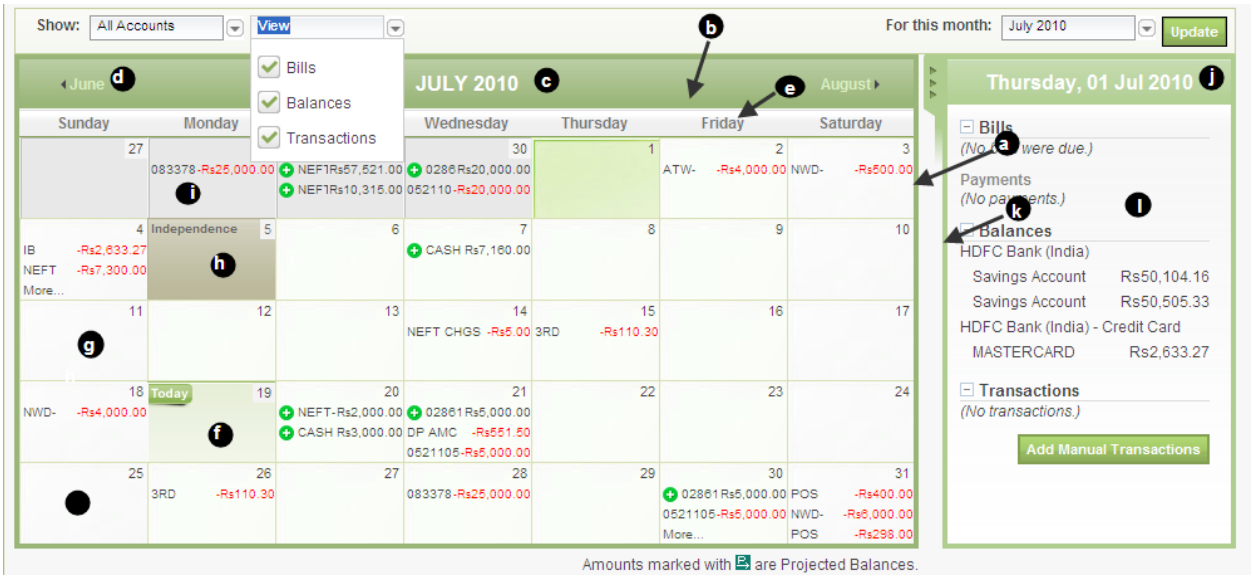
Label	Element Name	Style Values	Recommended Background
a	Background color	Background Color	
b	Color (top strip)	Color	
c	Color (bottom strip)	Color	
d	Curve corners	Curve	
e	Hyperlink	Color	
f	Button	Background and text color	

6 Financial Calendar

The section below captures the design (visual) details for the financial calendar.

Note: These details are required only if the Financial Calendar feature switch is turned ON.

Yodlee, Inc. © Copyright 2010 Confidential

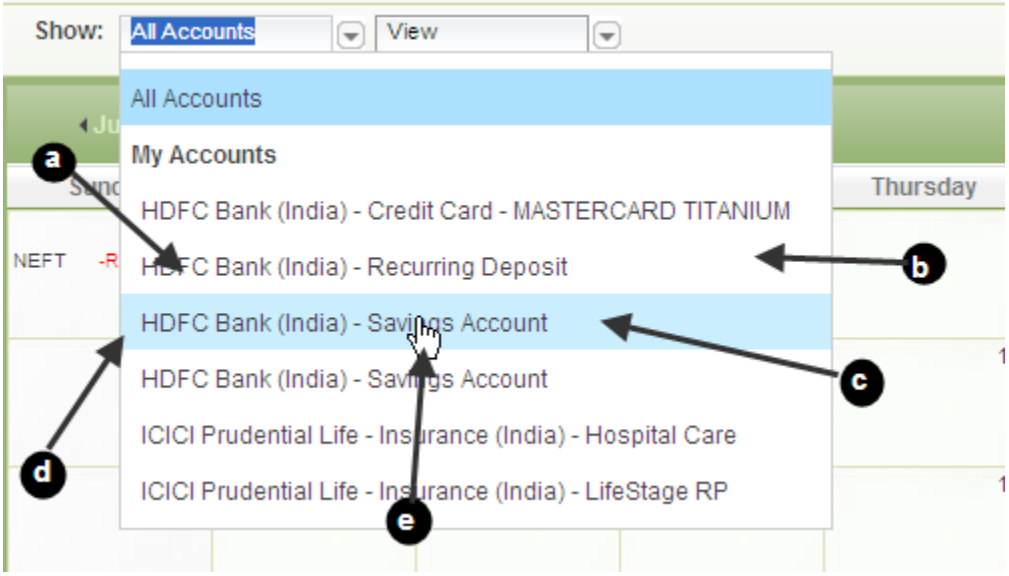


Label	Element Name	Style Values	Recommended Background
a	Calendar - Outer Border	Border Color	
b	Calendar – Months Header	Background Color/Image	
c	Calendar – Months Header – Current Month	Font Color	
d	Calendar – Months Header – Next/Previous Month	Font Color	
e	Calendar – Days Header	Background Color/Image Font Color:	
f	Today	Background Color/Image	
g	Weekends (Sat, Sun)	Background Color/Image	Default
h	Public Holidays	Background Color/Image	Default
i	Past days of the previous month	Background Color	Default
j	Sidebar Header	Background Color/Image Font Color	
k	Sidebar Outer Border	Border Color	
l	Sidebar Body	Background Color/Image	
o	Future days in the current month	Background Color	

Yodlee, Inc. © Copyright 2010 Confidential

Recommendation

"Day block" background should be in different shades of gray similar to the default application. Such neutral colors can fit into any color scheme.



Label	Element Name	Style Values	Recommended Background
a	Filter Fly out Font	Font Color	
b	Filter Fly out Background	Background Color	
c	Filter Fly out Option Highlight	Background Color Font Color	
d	Filter Fly out Border	Border	
E	Image - Mouse over	Image	

7 Budget

The section captures the cobrandable UI components for the budgeting application.

Yodlee, Inc. © Copyright 2010 Confidential

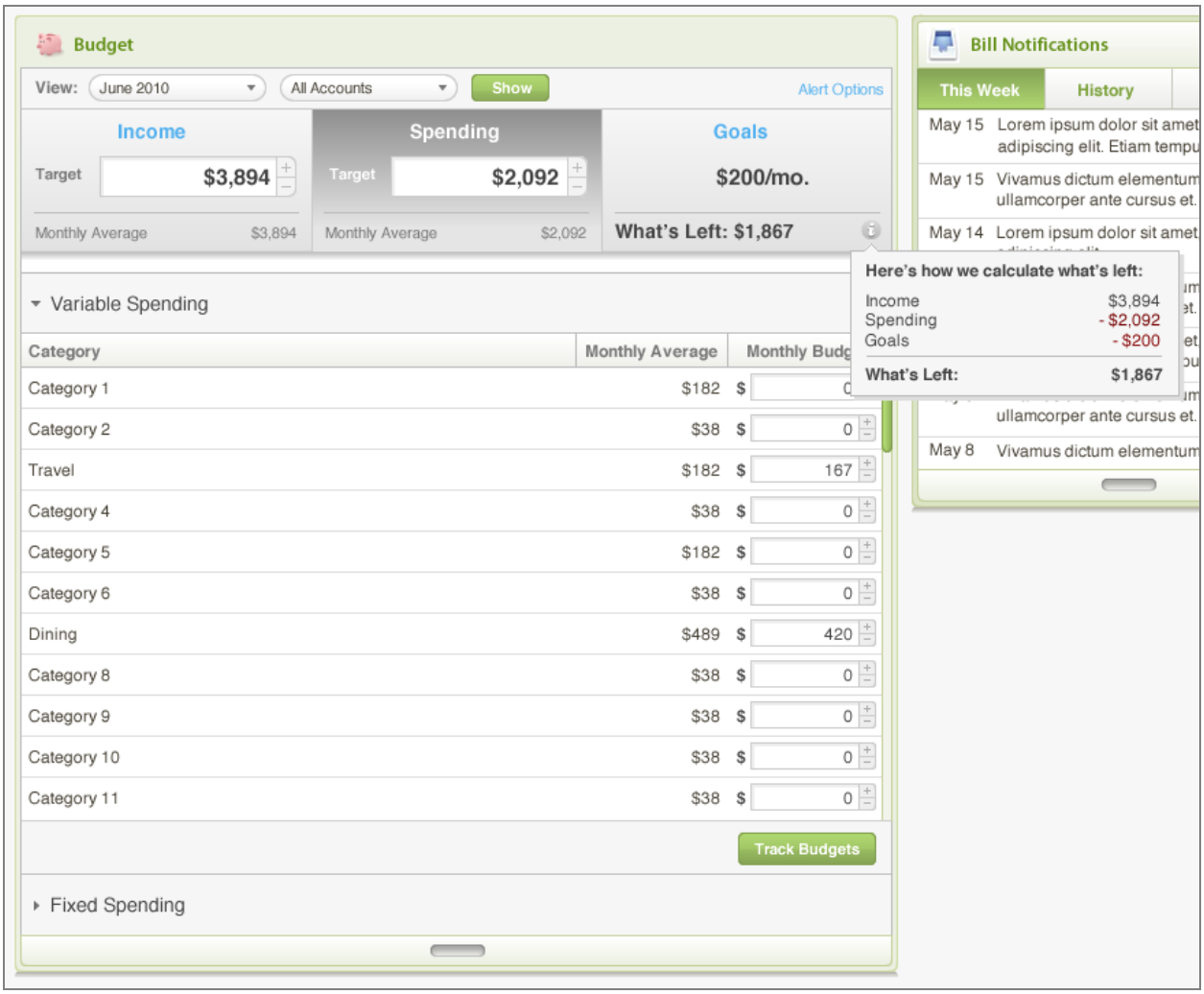


Figure 22: Setting Category Budgets

Yodlee, Inc. © Copyright 2010 Confidential

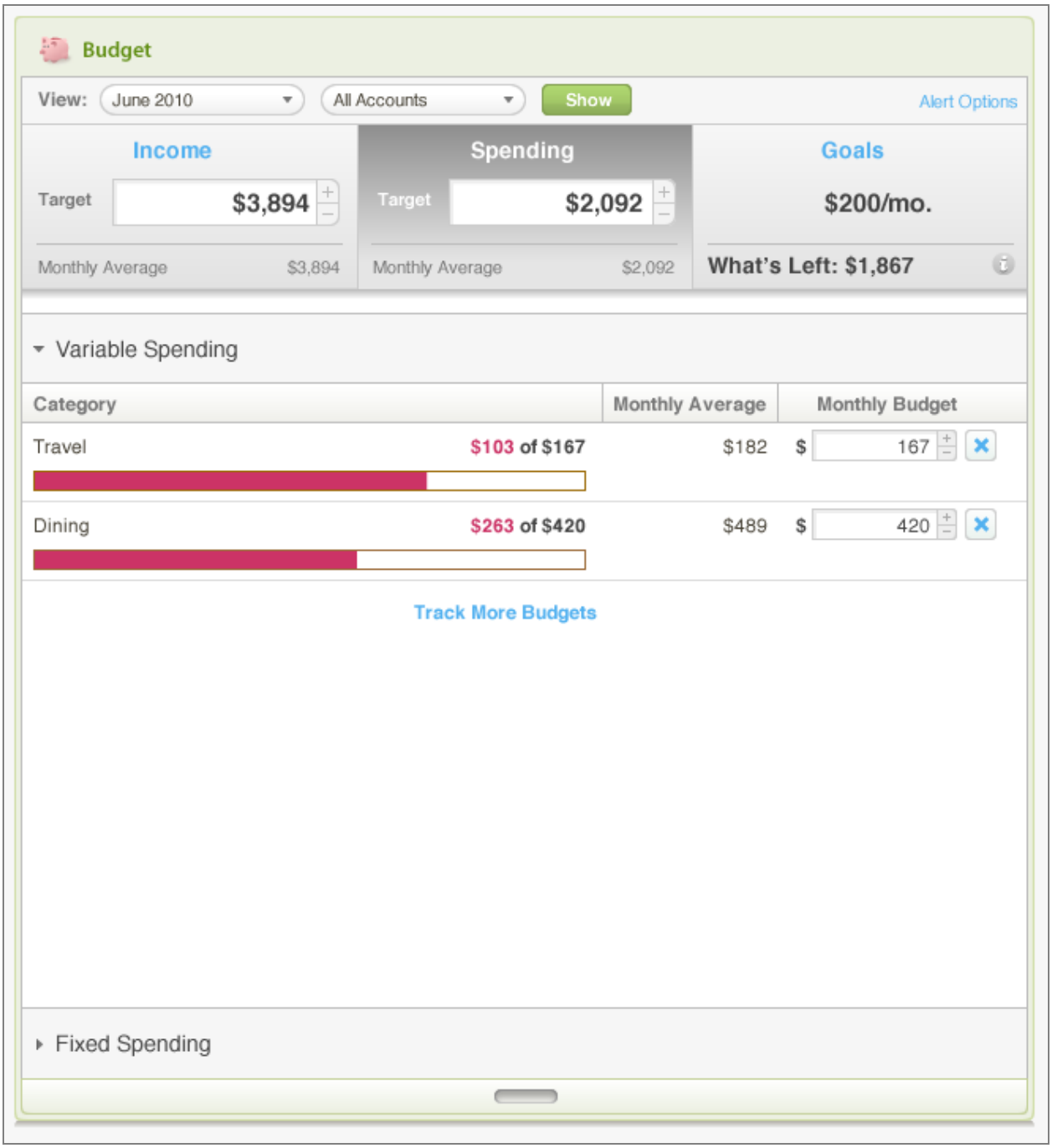


Figure 23: Review Budget

Element Name	Style Values	Customer Preference
Category Links (i.e., Income, Spending, and Goals)	Font Size Font Weight Font Color	

Yodlee, Inc. © Copyright 2010 Confidential

	Hover Properties Click Properties Selected Properties	
Overview Sections (i.e., Income, Spending, and Goals sections)	Font Size Font Color Font Weight Background Color/Image Hover Background Color/Image Selected Background Color/Image Form Text Field Font Size Form Text Field Font Color Form Text Field Weight	
Toggle	TBD	
Budget Chart	Under Budget Chart Color Over Budget Chart Color	
Budget Delete Icon	TBD	
Information Image	TBD	

8 Goals

Define the cobrandable UI components for savings goals

Yodlee, Inc. © Copyright 2010 Confidential

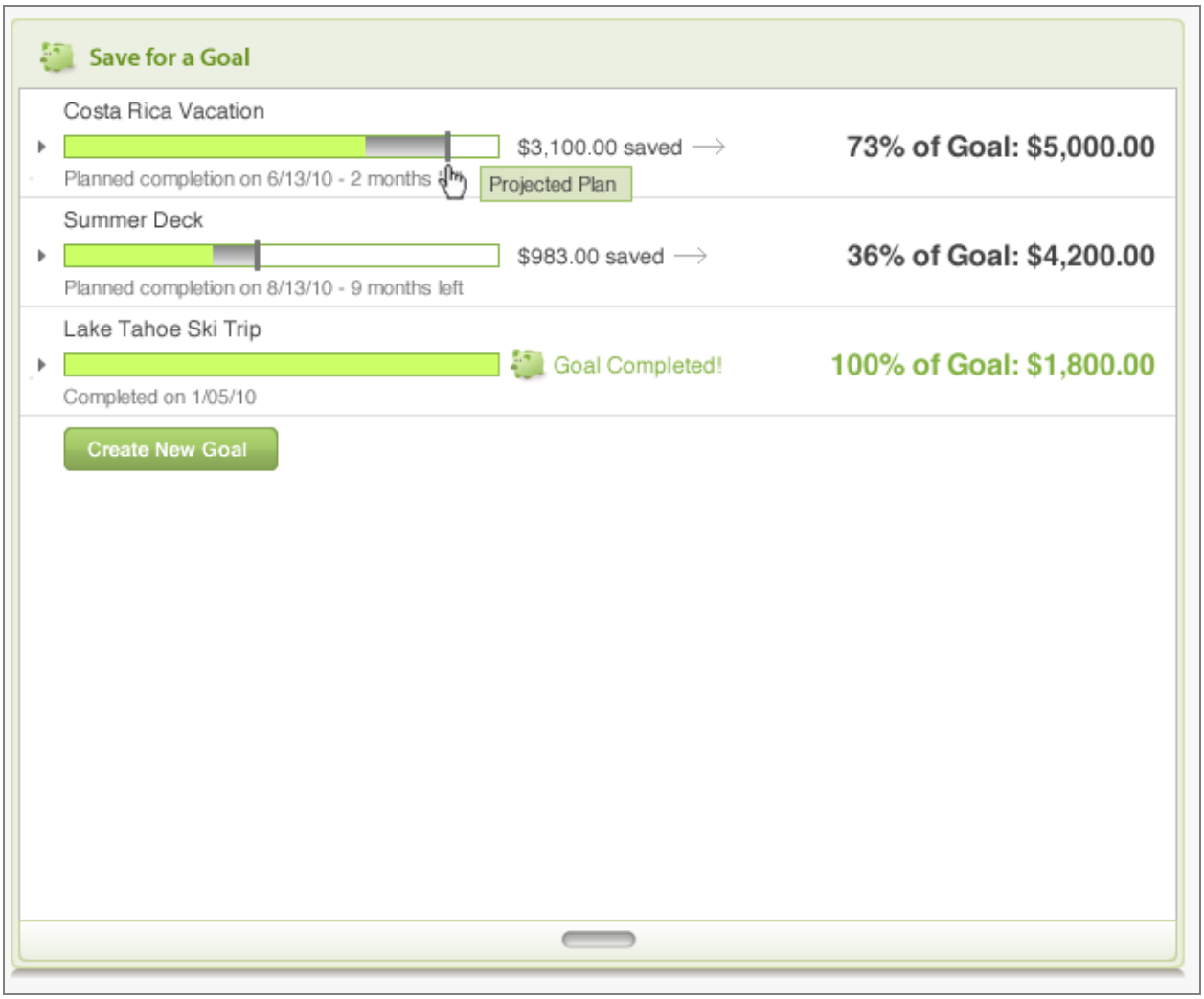


Figure 24: Goals

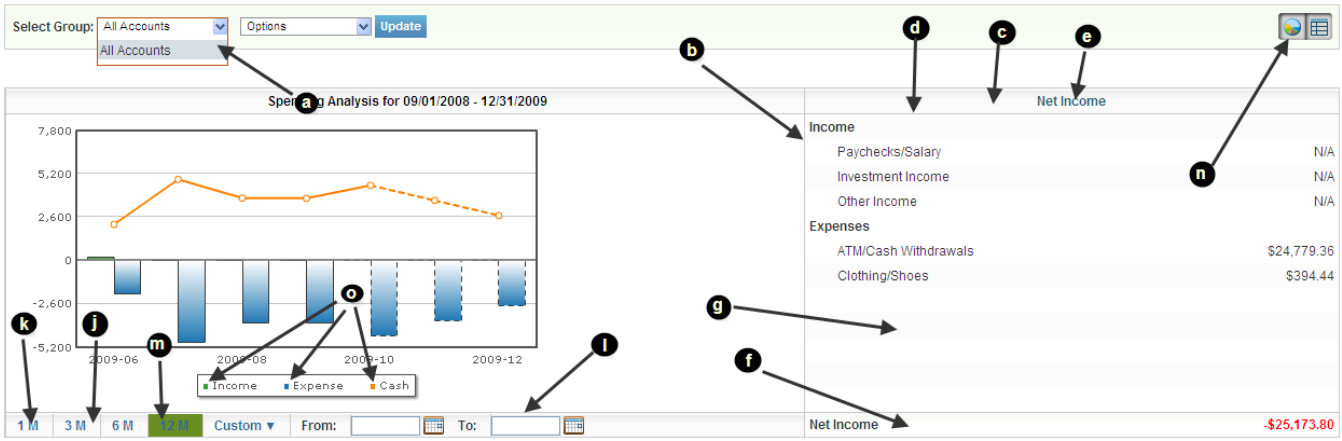
Element Name	Style Values	Customer Preference
Goals Chart	Goal in Progress Chart Color Goal Planned Progress Background Color Goal Completed Chart Color Chart Border	
Goal Progress Font	Font Size Font Weight Font Color (In Progress) Font Color (Completed)	
Goal Completed Image		
Create Goal Button		

Yodlee, Inc. © Copyright 2010 Confidential

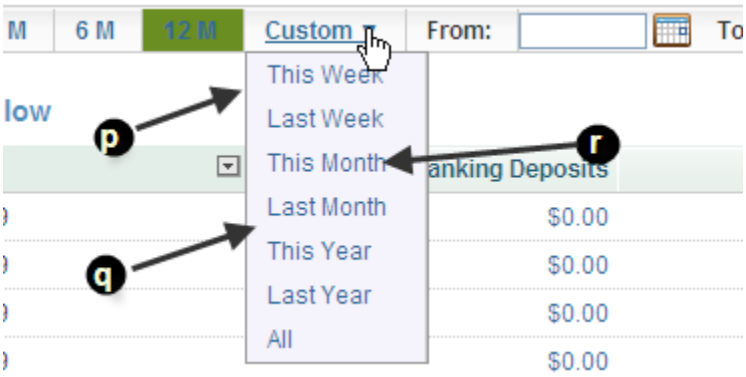
9 Spending Charts

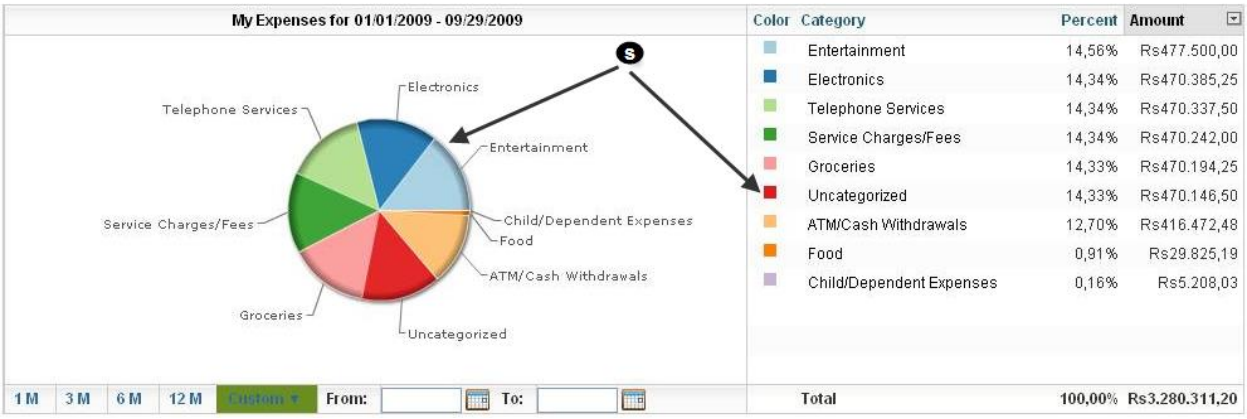
The section below captures the design (visual) details for the charting.

Spending Analysis



Color	Category	% of Total Spending	Amount
	Child/Dependent Expenses	100.00%	₫1,966,476.00
	Total	100.00%	₫1,966,476.00





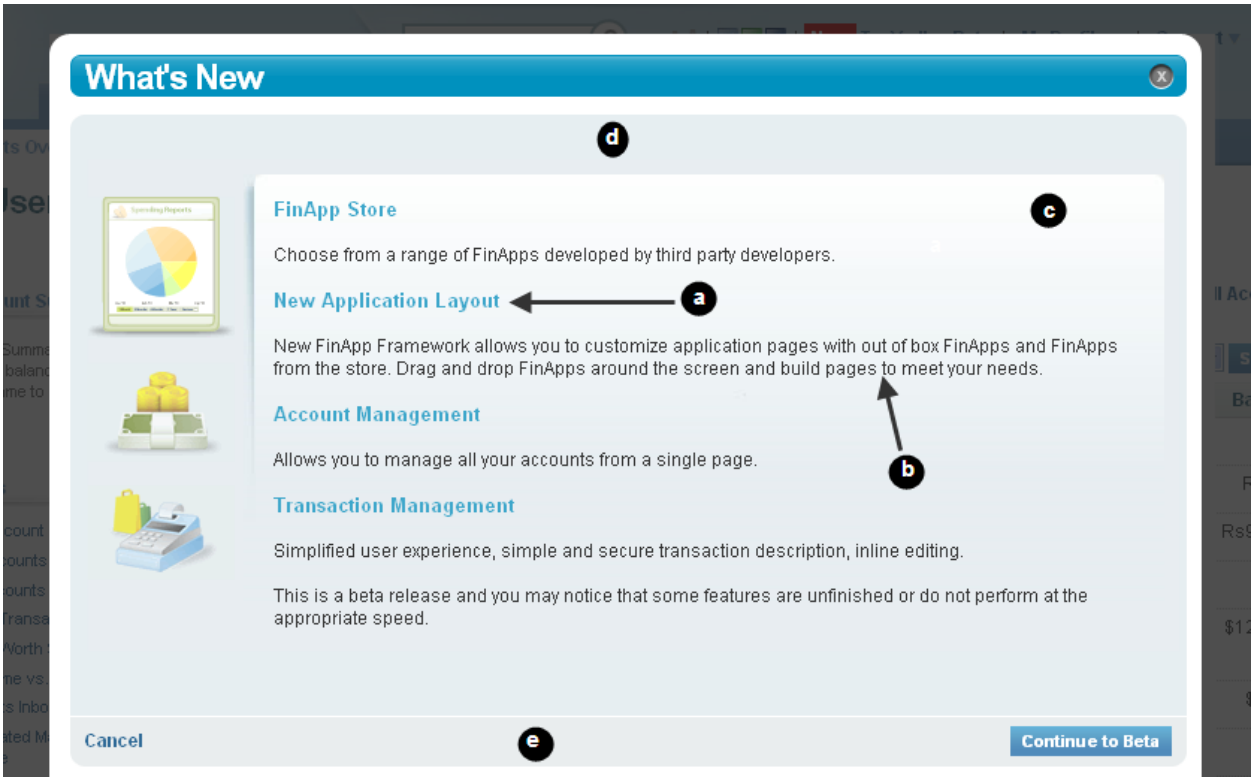
Color	Category	Percent	Amount
	Entertainment	14,56%	Rs477.500,00
	Electronics	14,34%	Rs470.385,25
	Telephone Services	14,34%	Rs470.337,50
	Service Charges/Fees	14,34%	Rs470.242,00
	Groceries	14,33%	Rs470.194,25
	Uncategorized	14,33%	Rs470.146,50
	ATM/Cash Withdrawals	12,70%	Rs416.472,48
	Food	0,91%	Rs29.825,19
	Child/Dependent Expenses	0,16%	Rs5.208,03
	Total	100,00%	Rs3.280.311,20

Yodlee, Inc. © Copyright 2010 Confidential

Label	Element Name	Style Values	Recommended Background
a	Filter Dropdown – Selected Value	Background Color	
b	Charting Table	Border	
c	Charting Table - Header	Background Color Background Image	
d	Charting Table - Header	Border - Bottom	
e	Charting Table - Header	Font Color	
f	Charting Table -Total Row	Background -Color Border -Top Border - Bottom Font Color	
g	Charting Table - Alternate Row	Background -Color	
h	Charting Table – Highlighted Row	Background - Color	
i	Charting Table Sorted Column Header	Background - Color	
j	Date Range Link	Background -Color	
k	Date Range Link	Font Color	
l	Date Rang Link	Border	
m	Date Range - Selected Link	Background - Color	
n	Image – Pie/Table for toggling images	Image	
o	Color palette for legends	Color Palette	
p	Drop-down menu on mouse over - border	Border	
q	Background color of drop-down menu	Background Color	
r	Drop-down menu items font	Font	
s	Pie Chart – Category Colors	Color	

Yodlee, Inc. © Copyright 2010 Confidential

10 Beta Promotional Floater



Label	Element Name	Style Values	Recommended Background
a	Second level heading – Font and Color	Font and Color	
b	Synopsis – Font	Font	
c	Background color	Background color (gradient)	
d	Background color	Background color (gradient)	
e	Bottom trip color	color	

Yodlee, Inc. © Copyright 2010 Confidential