



Yodlee CustomerCare

Version 8.0.2 - FAQ

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Question 1: How do I save the search query?

Answer

The **Service Request Search Results** page contains a field - Save Query As. Enter an appropriate name for the query and click **Save Query**.

The saved query appears in the My Saved Queries list displayed in the side bar region of the following pages:

- View Service Request Queue
- Find Service Request
- Submit New Service Request

Question 2: Is it possible to simultaneously login from multiple systems with the same user ID?

Answer

No, it is not possible to simultaneously login from multiple systems with the same user ID.

Question 3: I have opened a service request from a list. Does Yodlee CustomerCare provide the Next and Previous links, to access other requests present in the list?

Answer

No, Yodlee CustomerCare does not provide the Next and Previous links, to access other service requests present in the list.

Question 4: Is it possible to simultaneously change the priority of multiple service requests?

Answer

No, it is not possible to simultaneously change the priority of multiple service requests.

Question 5: What is the difference between Escalate to Yodlee and Share with Yodlee?

Answer

Escalate to Yodlee: Assigns the service request to Yodlee. Yodlee will analyze the service request, and work towards resolving the service request. Ownership of the service request is assigned to Yodlee.

Share with Yodlee: Allows Yodlee to view the work log of the service request and there by monitor the progress of the service request. You will still be responsible for handling the service request.

Question 6: Is it possible to export the list of service requests?

Answer

No, it is not possible to export the list of service requests.

Question 7: What is the difference between Send E-mail to Customer and Share with Customer?

Answer

Send Email to Customer: An email is sent to the customer stating that an update is made to the service request. The email contains a URL that provides access to customer's account.

Share with Customer: Customer can view the work log in his account. Customer does not receive any notification (email) about the update made to service request.

Note: The above features are only available in the premium version of Yodlee CustomerCare.

Question 8: Can I add more than one email address to share my internal work log?

Answer

No, you can only add one email to share your internal work log.

Question 9: Where can I view the attachment?

Answer

In the **Update Service Request** page, the Work Log History is displayed in a tabular format. The Attachment column of the table displays the name of attachment. To view the attachment, click the attachment, and then click **Open**. In case you are unable to view the Attachment column, use the horizontal scroll bar of the browser.

Question 10: How do I make sure that work log I enter is visible to Yodlee?

Answer

Making the work log visible to Yodlee is a two-step process.

1. Update the service request by selecting the **Escalate to Yodlee** check box, and submit the service request.
2. Again update the service request by selecting the **Share with Yodlee** check box.

The work log will now be visible to Yodlee.

Question 11: Is it possible to simultaneously close multiple service requests?

Answer

No, it is not possible to simultaneously close multiple service requests.

Question 12: When do I receive an email from Yodlee?

Answer

You will receive an email from Yodlee when an update is made to the service request. For example, you will receive an email when there is a change in the status of an escalated service request.

Question 13: I am unable to see the updates provided by Yodlee, while they are stating that they have added a work log. Why?

Answer

Yodlee has changed the status of the service request without adding a work log. To ascertain the change in status, check the present status of the service request. For further information, contact Yodlee.

Question 14: I get an email when Yodlee updates a service request. However, I don't see their work log there? Why?

Answer

For security reasons, Yodlee does not send work log in email. Email is only to notify you that an update is made to service request. The email contains a URL which provides access to the work log.

To see the work log, click the URL present in the message and login to Yodlee CustomerCare. You will be directed to the **Update Service Request** page of the respective service request.

Question 15: Can I search for the service requests responded by a customer service representative (CSR) on a particular day?

Answer

No, you cannot search for service requests responded by a customer service representative (CSR) on a particular day.

Question 16: How do I view the customer profile?

Answer

To view the customer profile

1. Click the **Customer Management** tab.
The **Search Transaction/Customer** page is displayed.
2. Find Customer:
Enter the relevant search criteria and click **Find Customer**.
The **Customer Search Results** page is displayed.
3. Click the customer name for whom you want to view the profile.
The profile page is displayed.

Note: The above feature is only available in the premium version of Yodlee CustomerCare.

Question 17: How do I view the history of service requests submitted by a particular customer?

Answer

To view history of service requests submitted by a particular customer

1. Navigate to the profile page of the customer.
2. Click the **All Service Requests** link.
All the service requests submitted by the customer are displayed.

Note: The above feature is only available in the premium version of Yodlee CustomerCare.

Question 18: How do I view the payment activities of a customer?

Answer

To view payment activities of a customer

1. Navigate to the profile page of the customer.
2. Click the **All Payment Activity** link.
All the payment activities of the customer are displayed.

Note: The above feature is only available in the premium version of Yodlee CustomerCare.