

This is a sampling of the work I did while at Yodlee, Inc. in 2011. I was brought in to edit, standardize, and in some cases completely rewrite user-facing text, including error messages, alert email messages, and user interface text.

Content Type	Before	After
Email alert (body only; header and footer separate)	<p>It has been &lt;number of&gt; days since you registered for the &lt;FundsTransfer&gt; Service. However, you have not completed verification of at least two of your accounts. To take advantage of the &lt;FundsTransfer&gt; Service, a minimum of two verified accounts need to be added to your &lt;cobrand name&gt; account.</p> <p>Remember, with the &lt;FundsTransfer&gt; service, you can:</p> <p>Freely move funds to/from bank, credit union, and brokerage accounts</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Set up one time and recurring transfers</li> <li><input type="checkbox"/> Use &lt;cobrand name&gt; Instant Account Verification technology to instantly verify and enable your accounts for transfers</li> </ul> <p>Using the service is easy. Just go to &lt;com.yodlee.core.alert.base.index.ftlink&gt; and log in to your &lt;cobrand name&gt; account. Click &lt;FundsTransfer&gt; and follow the instructions to add and verify your accounts for funds transfer.</p>	<p>You registered for the &lt;FundsTransfer&gt; service &lt;number of&gt; days ago, but you have not finished verifying two or more accounts. To take advantage of the &lt;FundsTransfer&gt; service, a minimum of two verified accounts need to be added to your &lt;cobrand name&gt; account, with one of the accounts at an institution other than &lt;cobrand name&gt;.</p> <p>Remember, with the &lt;FundsTransfer&gt; service, you can:</p> <ul style="list-style-type: none"> <li>• Freely move funds to and from bank, credit union, and brokerage accounts</li> <li>• Set up one time and recurring transfers</li> <li>• Use &lt;cobrand name&gt; Instant Account Verification technology to instantly verify and enable your accounts for transfers</li> </ul> <p>To verify your accounts and get started using &lt;FundsTransfer&gt;, go to &lt;FundsTransfer&gt; and log in to your &lt;cobrand name&gt; account. Click &lt;FundsTransfer&gt; and follow the instructions.</p>

Content Type	Before	After
Email alert (body only; header and footer separate)	<p>Please be advised that the following check payment:</p> <p>Payee: Payee Address: Payment Amount: Payment ID: Check Number: Due Date:</p> <p>has expired on &lt;expiry date&gt; due to being more than &lt;expired check timeframe&gt; days old. Please log on to your &lt;common.strings.cobrand.name&gt; account for more details.</p>	<p>Your check to &lt;Payee&gt; expired on &lt;expiry date&gt;, because it is more than &lt;expired check timeframe&gt; old. The check details are below.</p> <p>Payee: &lt;Payee&gt; Payee address: &lt;PayeeAddress&gt; Payment amount: &lt;Amount&gt; &lt;Cobrand name&gt; reference number: &lt;confirmation number&gt; Check number: &lt;CheckNumber&gt; Pay on date/Process on date:&lt; pay on for risk user and process on for good funds&gt; Expiration date: &lt;expiry date&gt;</p> <p>For more details, log in to your &lt;common.strings.cobrand.name&gt; account.</p>
Email alert (body only; header and footer separate)	<p>Instant account verification for your account ending with &lt;account number - last 4 digits&gt; has been initiated and is pending for your verificaiton. Account Name: &lt;account name&gt;</p> <p>Instant account verification for your account ending with &lt;account number - last 4 digits&gt; has been initiated and is pending for your verificaiton. Account Name: &lt;account name&gt;</p> <p>Using the service is easy. Just go to &lt;com.yodlee.core.alert.base.index.ftlink&gt; and log in to your &lt;COBRAND_NAME&gt; account. Follow the simple instructions to add additional accounts to your &lt;com.yodlee.core.alert.base.alerts.oncenter&gt; account or set up transactions.</p>	<p>Instant account verification for your account ending with &lt;account number - last 4 digits&gt; has been initiated and is pending.</p> <p>Account name: &lt;account name&gt;</p> <p>Log into your &lt;COBRAND_NAME&gt; account for more information.</p>

Content Type	Before	After
Help Content (intended to be more "tips and tricks" than "how-to")	<p><b>Title:</b> Bill Reminder FinApp</p> <p><b>Definition:</b> The Yodlee Bill reminder FinApp displays outstanding bills that are linked with the accounts through Yodlee Personal Finance</p> <p><b>High-Level Features:</b></p> <ul style="list-style-type: none"><li>• You can see the payee name, due date, minimum payment due where payments are owed. In the case of ' Total amount due' and 'total minimum amount due', currency and date format setting is as per your preferences</li><li>• You can mark a Bill as paid by accessing the link and also selecting the mode of payment through the drop down, after which, the bill no longer is available in this FinApp</li></ul> <p><b>Related Activities:</b></p> <ul style="list-style-type: none"><li>• You can view your bills on <u>Financial Calendar</u> page.</li></ul> <p><b>Important Note(s):</b> If a bill due exceeds the maximum number of days set, it will cease to appear in the reminders list if the biller issues a new bill</p>	<p><b>Title:</b> Bill Reminder FinApp</p> <p><b>Definition:</b> See what bills are coming up so you never miss a due date.</p> <p><b>High-Level Features:</b></p> <ul style="list-style-type: none"><li>• See all your upcoming bills in one place.</li><li>• Mark a bill as paid if you paid by check or in person.</li></ul> <p><b>Related Activities:</b></p> <ul style="list-style-type: none"><li>• You can also view your bills on the Financial Calendar page.</li><li>• Pay your bills on the Payments page.</li></ul> <p><b>Important Note(s):</b> If a bill is left unpaid for the maximum number of days, it will disappear from the reminders list if the biller issues a new bill</p>

Content Type	Before	After
<p>Help Content (intended to be more "tips and tricks" than "how-to")</p>	<p><b>Title:</b> Cash Flow Analysis  <b>Definition:</b> Review your income, spending, and cash-on-hand over time to get a sense of where your cash is flowing.  <b>High-level Features:</b></p> <ul style="list-style-type: none"> <li>•Run the cash flow analysis for a variety of time periods.</li> <li>•The transactions listed below the chart are broken down by type.</li> <li>•Include or exclude business or projected expenses and transfers.</li> </ul> <p><b>Related Activities:</b></p> <ul style="list-style-type: none"> <li>•Use Compare Me to see how your spending compares to against that of your neighbors.</li> </ul> <p><b>Important Note:</b></p> <ul style="list-style-type: none"> <li>•The Net Income table will display only the top 5 income sources.</li> </ul>	<p><b>Title:</b> Cash Flow Analysis  <b>Definition:</b> Cash Flow Analysis represents your income versus spending and the cash remaining over a period of time.  <b>High-level Features:</b></p> <ul style="list-style-type: none"> <li>• You can choose to run the analysis for 1, 3 6 or 12 months or weekly, monthly or yearly time scale</li> <li>• The transactions below the chart are broken down into Banking deposits/withdrawals, credit card payments/purchases.</li> <li>• Report also displays your average net cash flow and total net cash flow for the selected period.</li> <li>• You also have the option to include business expenses/and or projected expenses and transfers in the cash flow analysis chart</li> </ul> <p><b>Important Note:</b></p> <ul style="list-style-type: none"> <li>• The Net Income table will display the top 5 income sources.</li> <li>• The balance of the categories under expense will be listed in the Other.</li> </ul>

<b>Content Type</b>	<b>Before</b>	<b>After</b>
Error Message	<b>Site Device Information expired:</b> We cannot update your account because the device information you provided is no longer valid at the site. We request you to <REMOVE_ACCOUNT_URL> remove this site.	<b>Site Device Information Expired:</b> We're sorry, we can't update your account because your token is no longer valid at the <ACCOUNT_NAME> site. Please <EDIT_SITE_URL> update your information and try again, or contact <ACCOUNT_NAME>'s customer support.
Error Message	<b>Problem Updating Account:</b> We could not update your account due to unexpected variations at the <ACCOUNT_NAME>. This type of error is often resolved in a few days. We apologize for the inconvenience. Please try again.	<b>Problem Updating Account:</b> We're sorry, there was a technical problem updating your account. This kind of error is usually resolved in a few days. Please try again later.