

Troubleshooting Accounts

In this guide, we will walk you through basic troubleshooting steps you can take to correct any of your connected accounts with errors. Unless noted by the institution, values should update nightly but errors can occur from time to time for different reasons. To keep your website up to date, we recommend logging in regularly to maintain all connections! If you are still experiencing errors, please reach out to our team for further troubleshooting efforts.

Common Errors & Troubleshooting Tips

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Your accounts are easily access from your **Organizer**. Once in your Organizer, click **Accounts** to see a summary of all accounts entered into the system both by you and your financial representative.

The screenshot displays the 'Organizer' tab selected in the top navigation bar. On the left sidebar, the 'Accounts' link is highlighted with a red circle. The main content area shows two user overviews: 'Casey Overview' and 'Hannah Overview'. Below these, there are sections for 'People' (listing Mary, Lucas, Elaine, and Bob) and 'Property' (listing Beach Condo, Cars, and Family Home). The 'Accounts' link in the sidebar is circled in red, indicating the next step in the troubleshooting process.

Troubleshooting Accounts

Unable to get the most recent account values

In the notification bar, click the link that says Click to Fix. Next, click the Refresh icon. This will refresh the entire connection and pull the most recent account values. If the refresh does not fix the error, contact our team for further troubleshooting options.

Financial Institution		delete find new refresh	
<div> <div> ⚠ We're unable to get the most recent account values. Click to close </div> <div> This is a temporary problem. Click Refresh to see if it has been resolved. <div>Refresh</div> </div> </div>			
401k ACCOUNT	Qualified Retirement - Traditional 401(k)	12/04/2017 09:00PM	\$70,530
INDIVIDUAL	Taxable Investment	12/04/2017 09:00PM	\$44
Connection last updated 12/04/2017 09:00PM		Financial Institution Website URL	

The institution rejected your credentials

This error occurs when attempting to connect to the institution and the credentials are rejected by the institution. Click the banner to fix. First, confirm you can log in to the institution directly by clicking the institution name. A new browser tab will open for you to confirm your credentials. If they work, navigate back to your wealth management site and re-enter your credentials and click Connect.

Financial Institution		delete refresh	
<div> <div> ⚠ The institution rejected your credentials. Click to close </div> <div> Please verify that you can log into Institution then enter your credentials in the form below. <div> <div>User Name</div> <input type="text"/> </div> <div> <div>Password</div> <input type="password"/> </div> <div>Password is required.</div> </div> <div>Connect</div> </div>			
Mortgage	Mortgage - Mortgage	11/28/2017 06:00PM	-\$170,822
Connection last updated 11/28/2017 06:00PM		Financial Institution Website URL	

Troubleshooting Accounts

Connection to this institution has been disconnected due to inactivity

If your connection has required attention after a period of 30-days, it will become disconnected. Your history will not be deleted, but the system will no longer attempt to update account values. Click to fix and enter the required information.

Financial Institution

delete

refresh

⚠

The connection to this institution has been disconnected due to inactivity. [Click to close](#)

To reopen this connection, enter your credentials in the form below.

13-Digit Account Number (Enter N/A if not applicable)

User ID(Enter NA if not applicable)

Web Password

Connect

Account

Qualified Retirement - Traditional 401(k)

08/17/2017 12:27AM

\$41,717

Connection last updated 08/17/2017 12:27AM

Financial Institution Website URL

The institution is asking for additional verification

The institution is prompting for additional verification. These prompts come directly from the financial institution. Confirm on their website that your answers are correct then click Connect.

Financial Institution

delete

refresh

⚠

The institution is asking for additional verification. [Click to close](#)

What was your high school mascot?

In what city did you honeymoon?

Connect

Mortgage

Mortgage - Mortgage

07/30/2017 07:27PM

-\$111,203

Connection last updated 07/31/2017 03:24AM

Financial Institution Website URL

Troubleshooting Accounts

This connection needs attention

Click the Institution URL. This will open up the institution log on page in a new browser tab. Confirm that you can log in using that specific site. If credentials are auto-saved, make sure to manually type them in to confirm that the credentials you supplied on your wealth management site will work on the institution site.

No accounts found at the institution

Sometimes accounts are not immediately recognized. Click the binoculars icon to find new accounts. This will refresh with any accounts available at the institution.

