

# Connection Errors

## Accounts Missing

**Solution:** Check to see if the account is still available at the financial institution. If the account is still available at the financial institution, refresh the Connection and check for unlinked accounts. If that fails, open a support issue for additional troubleshooting.

**About the Issue:** We are no longer receiving data for an account through the Connection. Most likely, the account was closed or something at the financial institution changed (e.g., the account number changed, the account was moved, etc.).

## Additional Credentials Needed

**Solution:** Advisor/Client that added the Connection needs to go through the one-time access code process or enter in the security questions.

**About the Issue:** The Connection is prompting for either a one-time access code or security questions.

## Connection Error

**Solution:** Refresh the Connection. If the error persists open a support issue for assistance.

**About the Issue:** Usually indicates we are temporarily unable to connect to the financial institution (e.g. server errors).

## Credentials Needed

**Solution:** Advisor/Client needs to update the credentials.

**About the Issue:** The username or password entered into the Connection is invalid.

## General Error

**Solution:** Refresh the Connection. If the error persists open a support issue for assistance.

**About the Issue:** Usually indicates an error with the Connection (e.g. server errors, coding issues, or IP block).

# Connection Errors

## Group Error

**Solution:** On the Status page of the connection click View Groups with Errors, click into groups showing the errors, and check to make sure all the identifiers added are valid. Remove all invalid or duplicated identifiers. If the error persists, open a support issue for assistance.

**About the Issue:** There is an error on one of the groups (e.g., household or client) in the Connection. Usually caused by invalid identifiers or duplicate identifiers being added in the group.

## Not Yet Available

**Solution:** Refresh the Connection. If the error persists open a support issue for assistance.

**About the Issue:** Indicates that the Connection is still under construction or has a new feature that is not supported yet (e.g., One Time Access code or Security Questions).

## Uninitialized Error

**Solution:** Refresh the Connection. If the error persists open a support issue for assistance.

**About the Issue:** Usually indicates an issue with setting up the Connection. Sometimes you can see this error on Connections that were showing either a General Error or a Connection Error.

## Values Out of Date

**Solution:** Refresh the Connection. If the error persists open a support issue for assistance.

**About the Issue:** The account data is correct, but older than the data expected to be available at the institution.