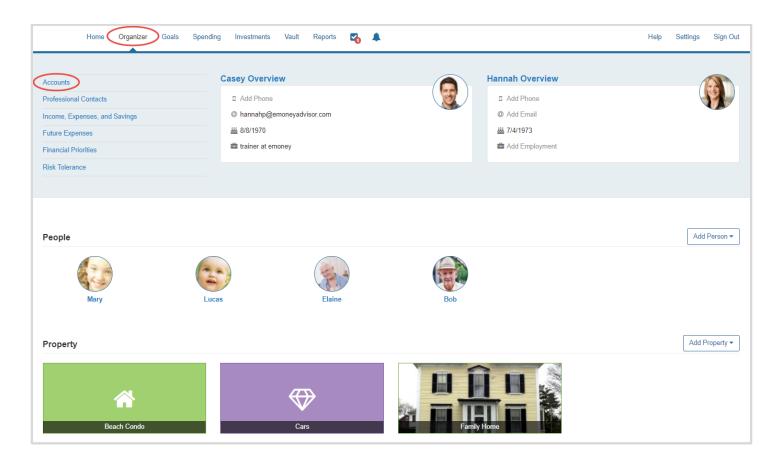# Troubleshooting Accounts

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

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

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.

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.

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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.

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.

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This connection needs attention

Click the Institution URL. This will open 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.