Troubleshooting Accounts

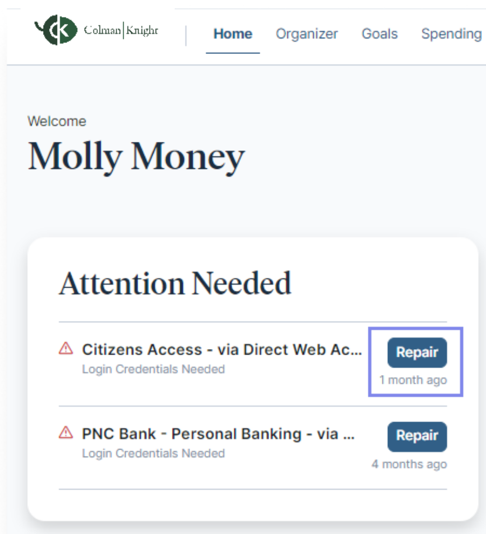
Integral Wealth Portal

This User Guide details how to repair any of your connected accounts with errors.

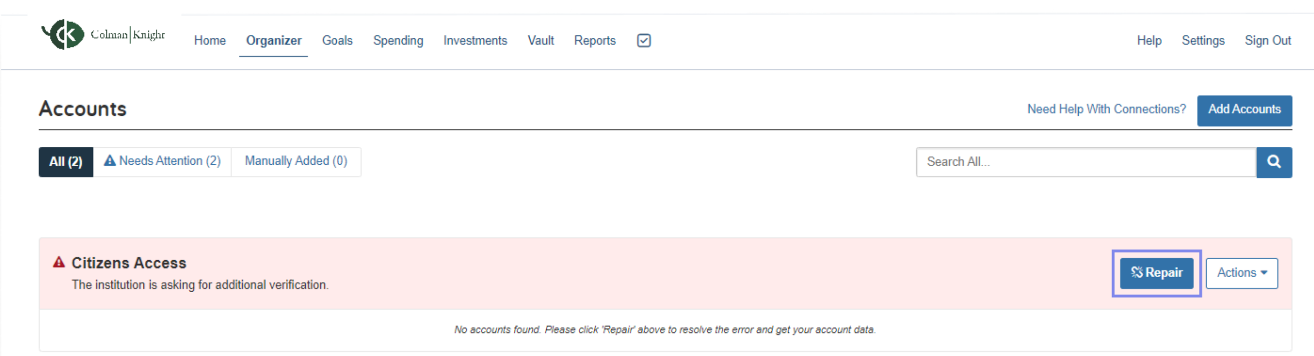
Unless noted by the institution, values should update nightly, but errors can occur from time to time for different reasons. To keep your Portal up to date, we recommend logging in regularly to maintain all connections.

Troubleshooting and Help - Repair

When a connection is in an error state, an **Attention Needed** card will appear on your Home page. Click **Repair** to view instructions on how to resolve the error.

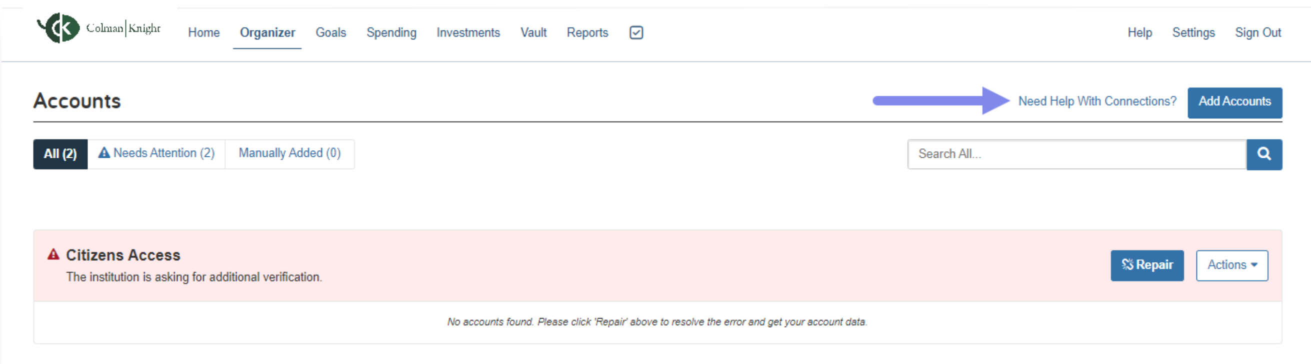


You can also troubleshoot a connection error from your Accounts page by clicking the **Repair** button in the red banner within your connection. Different errors will provide different steps to resolve the issue.



Need Help With Connections?

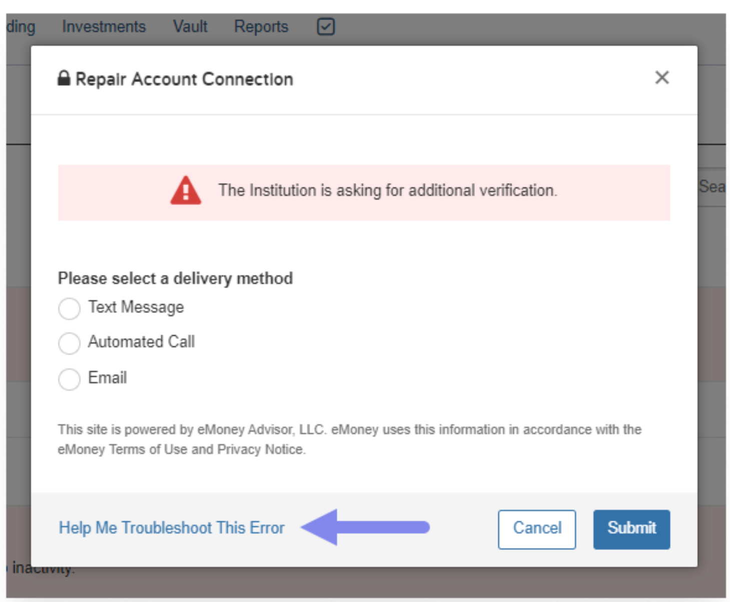
Clicking the **Need Help With Connections?** button at the top of the Accounts page will open the Connecting Accounts Help Interactive User Guide. The lessons in that guide cover connecting and managing your accounts, FAQ, and troubleshooting the different error types.



Help Me Troubleshoot This Error

When you click the **Repair** button on a connection, a pop-up window appears with steps to resolve the issue.

Click **Help Me Troubleshoot This Error** at the bottom of the window to launch the Connecting Accounts Help guide and see the section specific to the error you are experiencing.



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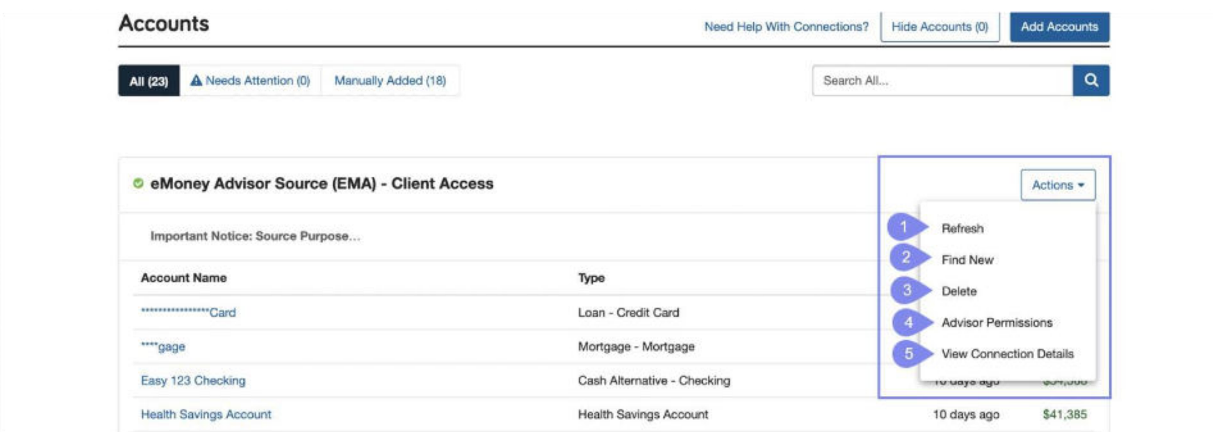
Using the Actions Dropdown

The **Actions** dropdown is available on every connection and helps you to manage the connection and resolve errors.



1) Refresh: Get the most recent account values

Use this action when the account values show as out of date. This will attempt to Refresh the connection and find the most recent account values at the institution.

2) Find New: Search the institution for new or additional accounts

Find New is only visible to you unless the Advisor Permission is set to Yes (see #4). Selecting **Find New** will search the institution for any accounts that have not yet been linked through the connection.

3) Delete: Permanently remove this connection

Clicking this will prompt you to **Delete** this connection and all its accounts. *Deleting a connection will delete all account history and spending transactions.* Only delete the connection if it is no longer needed.

4) Advisor Permissions: Allow your Advisor to Find New accounts for you

As a default, Advisors are not able to Find New accounts on your behalf because the Find New button is hidden from their view. Use Advisor Permissions to allow your Advisor to Find New accounts for this connection, on your behalf.

5) View Connection Details: View the Name, URL, and Type of Connection

Clicking this option will display a pop-up with additional details about the connection.