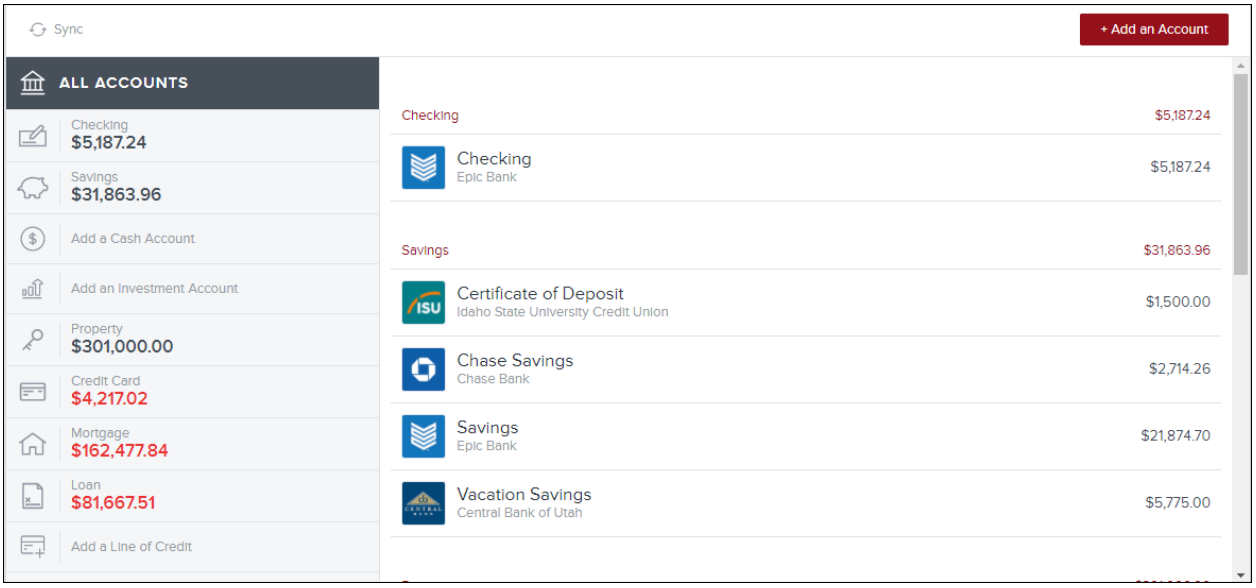
Accounts FAQs

Note: These FAQs are taken from the in-product help. If you're assisting users and you're in your own account so you can talk then through their issue more effectively, you can find this information there.

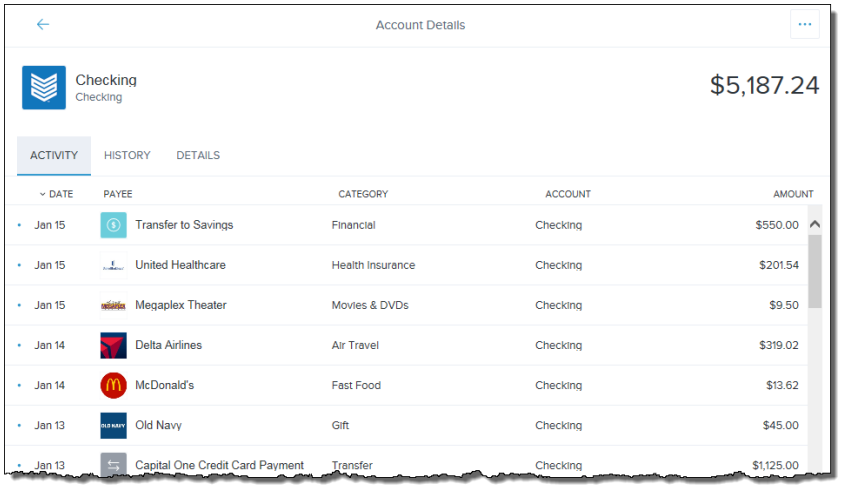
Overview

- Red represents debt accounts
- Add an Account lets you add any account including loans, property, credit cards and investments
- Click an account to edit it
- *Note: An Online Banking user can choose to only aggregate accounts (which will then appear in the Outside Accounts widget on the Online Banking Home Page). A user doesn't need to use other Money Management features if they don't wish to.*



Edit an Account

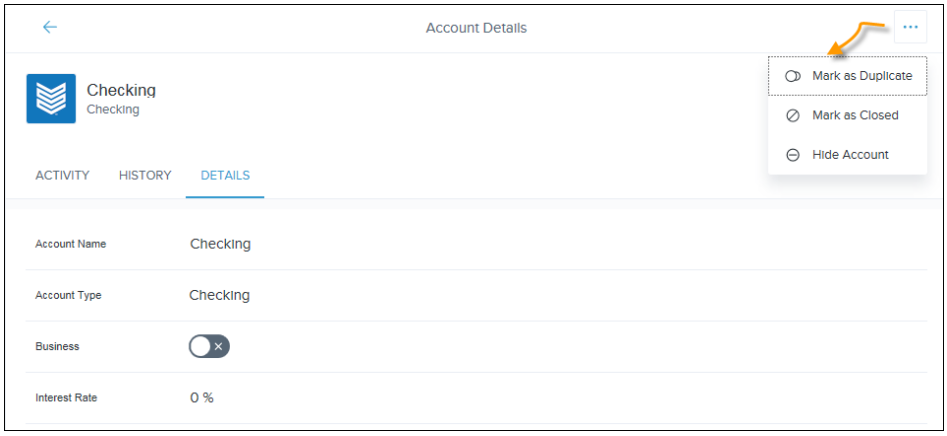
- Activity: Click an account to see monthly transactions



- History: Click a month's bar, then button at the bottom to view that month's transactions. Or double click a month's bar.

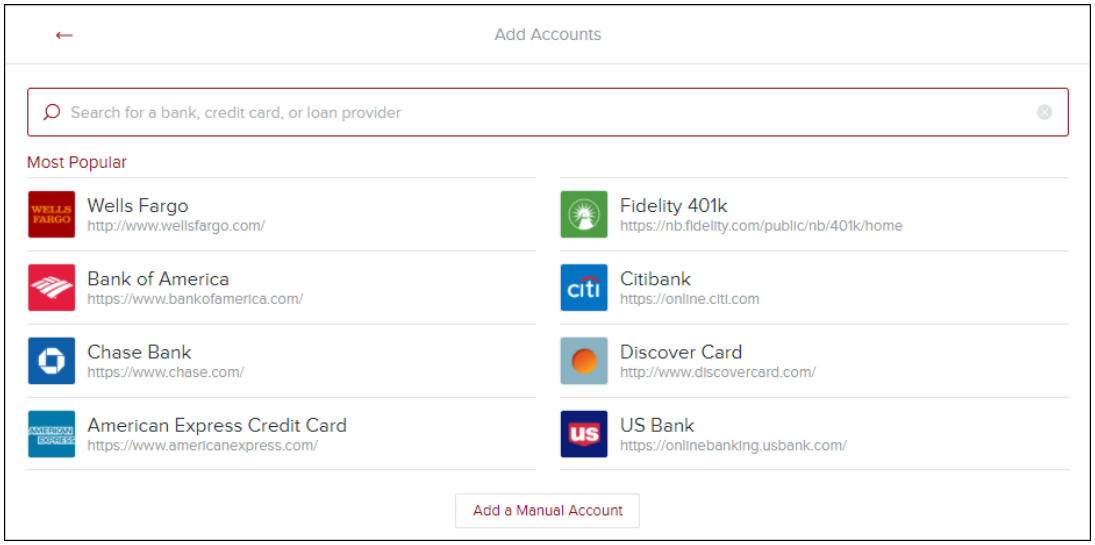
- Details:
  - Change the Account Name, Account Type and Interest Rate
  - Mark an account as Business or Not
  - Change Credit Limit and Original Balance (debt accounts only)
  - Change Account Balance (manual accounts only)

- Dot Menu at Upper Right:
  - Mark as Duplicate merges two accounts together. Click this if you see two versions of the same account
  - Hide Account hides the account's data from the application features, like Budget and Spending
  - Non-Host accounts also have a Delete option



Add an Account

- Click the Search Bar to find a specific savings, loan, credit card or investment account. Note that the URL listed in the search results won't necessarily be the one you typically use.
- Once you've found your institution, enter your UserID, password, and answer any multifactor authentication challenge.
- If an account requires attention, it will display a red or yellow exclamation mark. Click it and follow the prompts to resolve the issue.
- Add a Manual Account lets you add a manual savings, property, investment, etc. account.



Trouble adding an account?

1. Check all the available account types listed under an institution when you search. Sometimes mortgage, savings, credit card, etc. accounts are listed separately. You might also have to search for the specific account (i.e., "Bank of America mortgage," as opposed to just "Bank of America").
2. Verify your username and password with your institution to ensure your credentials haven't expired. Sometimes signing in can unlock a frozen account connection.
3. Turn off complicated security preferences (such as CAPTCHA and picture passwords) on your institution's site.
4. Allow your institution to accept third-party access by changing the preferences on their site.
5. Make sure you aren't simultaneously logged in to your institution's site on another tab or browser.
6. Make sure the software isn't waiting for your response to a security question.
7. If a connection breaks, you may have to enter your credentials again.

Need to fix an account that is "broken"?

Broken accounts have a yellow exclamation mark in the top right corner of the account card. To fix the connection:

1. Click the broken account
2. Click the yellow warning message in the Link Status section
3. Re-enter your login credentials

If the account continues to fail:

1. Log in to your financial institution's online banking to verify that your credentials are correct and that there are no holds on the account.
2. Make sure there are no holds on the account.
3. Don’t try to add the same account twice - the system does not support this. Instead, you may wish to delete the institution by selecting “Manage Connections,” then choosing the institution you want to delete (like “Chase” or “Wells Fargo”), then selecting “Delete Institution.” Note that this will delete all accounts associated with the chosen financial institution. Only after doing this should you try to re-add the account.

Note: If a connection is persistently down for more than two days, submit a support ticket.

Questions about deleting an account?

To delete an account:

1. Click the account you'd like to delete
2. Click the Dot Menu at upper right then “Delete Account”

You can't delete accounts at your primary financial institution.

Instead, you can exclude these accounts. To do so:

1. Click the account
2. Click the Dot Menu and then “Hide Account”

Note that any data older than 90 days cannot be restored in Money Management if you want to re-add an account you've deleted.

Seeing outdated accounts and paid-off loans?

Sometimes the data received doesn't signal when an account is deleted. If you want an outdated account deleted, submit a support ticket.

Seeing duplicate accounts?

You may occasionally see duplicate accounts from an automated feed. Fix this problem by either merging the duplicate accounts or by deleting one of the duplicates.

To merge an account:

1. Click the duplicate account
2. Click the Dot Menu, then Mark as Duplicate
3. Click Merge
4. Type MERGE into the appropriate box

Note: You can only merge accounts that come through the same automated feed.