

# Connections Dashboard

## Updated Connections Dashboard

To improve your connection experience, we have updated the Connections dashboard in your Personal Financial Website.

### Simplified Account View

To help you gain a clear picture of the health and status of your connections, we have simplified your account view to easily identify connections that may need attention.

The new color-coded institution status helps you easily identify connections that you can repair, such as updating credentials (in red), versus errors that require eMoney assistance, such as institution errors (in yellow).

#### Institution Connections Summary:

- Account Name
- Account Type
- Date last updated
- Connections Status
- Repair or View Button
- Actions Dropdown Menu

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Accounts

Need Help with Connections?

Add Accounts

All

Needs Attention (3)

Manually Added (2)

Advisor Managed (1)

Search Accounts...

▲ Chase Bank

The institution rejected your credentials.

Repair

Actions

Account Name	Type	Last Updated	Value
*****IRA	Investment	3 Days Ago	\$18,204
Chase Amazon Rewards Card	Credit Card	2 Days Ago	\$0
Mazda Auto Loan	Auto Loan	3 Days Ago	-\$12,022

● Wells Fargo - BenefitConnect

Some users are currently experiencing issues establishing connections to and getting updated data from Wells Fargo - Benefit Connect...[Read More](#)

Actions

Account Name	Type	Last Updated	Value
Wells Fargo 401k *****7463	Investment	2 Days Ago	\$2,019

● Bank of America

Some life insurance account types at the MassMutual website do not have account details beyond the face value of the account availa...[Read More](#)

Actions

Account Name	Type	Last Updated	Value
Savings *****7568	Cash Equivalent	Just Now	\$16,019
Checking *****7465	Cash Equivalent	Just Now	\$6,827

Other Accounts

These Accounts were added manually and will not update automatically.

Account Name	Type	Last Updated	Value
M&T Mortgage	Liability	Jan 12, 2020	-\$247,019
Pawtucket Credit Union - Savings	Cash Equivalent	March 3, 2020	\$8,187

### Account Filters

Easily identify connections with errors and warnings with new account filters.

Filter by:

- Accounts with Errors
- Accounts with Warnings
- Manual Accounts
- Advisor Managed Accounts

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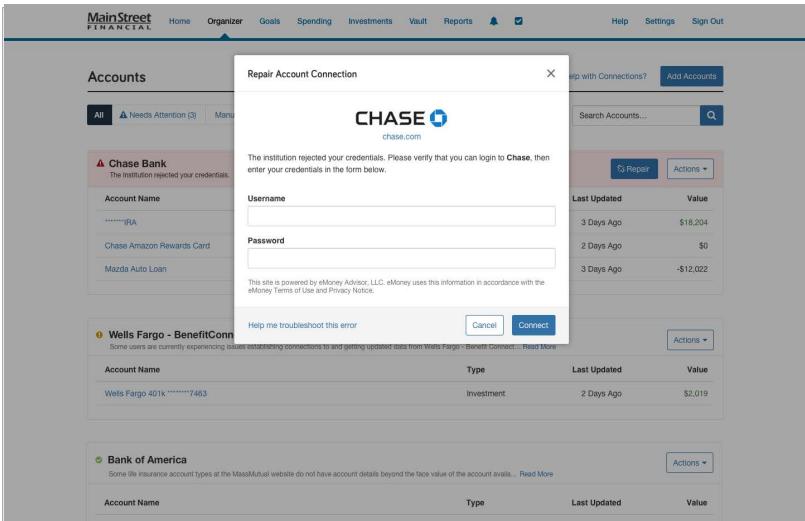
Other Accounts

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Account Name	Type	Last Updated	Value
M&T Mortgage	Liability	Jan 12, 2020	-\$247,019
Pawtucket Credit Union - Savings	Cash Equivalent	March 3, 2020	\$8,187

Fixing Connection Errors

To help troubleshoot connections with errors we have made it easier to not only identify, but also take action on user-fixable errors, such as updating credentials, access codes and security questions.



Institutional Outages

In certain instances, we will experience an outage or technical issue with an institution. In these cases, there is nothing for you to correct, and we will work with the institution to resolve the issue.

