

Connections Dashboard

Updated Connections Dashboard

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

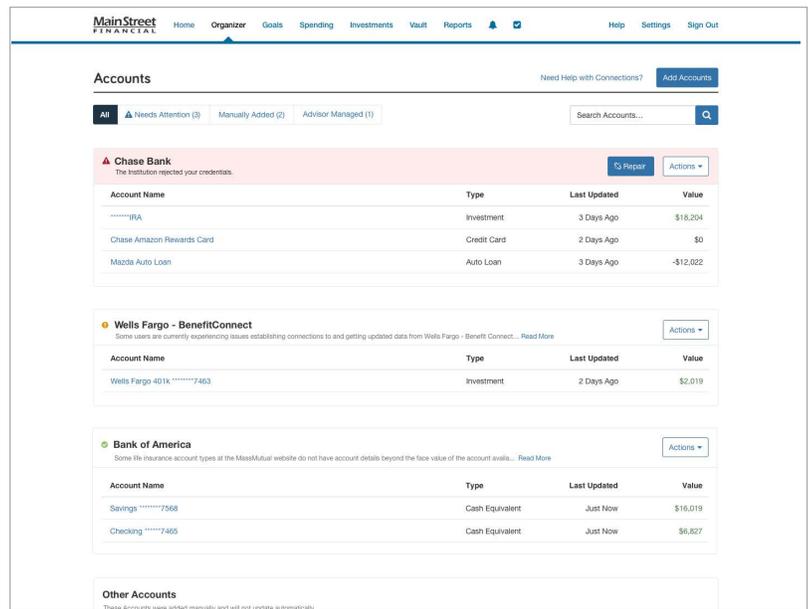
Simplified Account View

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

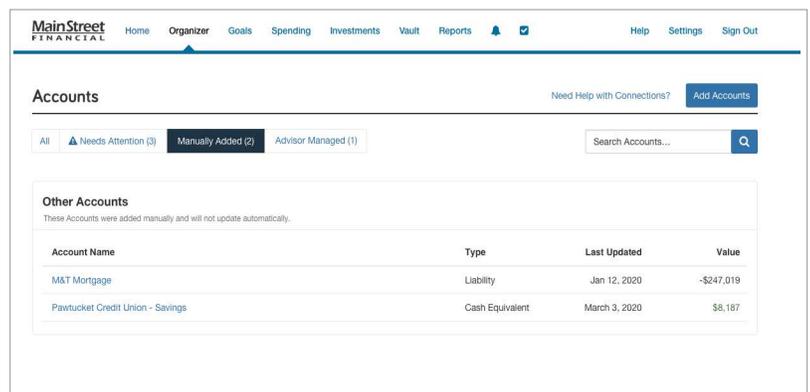


Account Filters

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

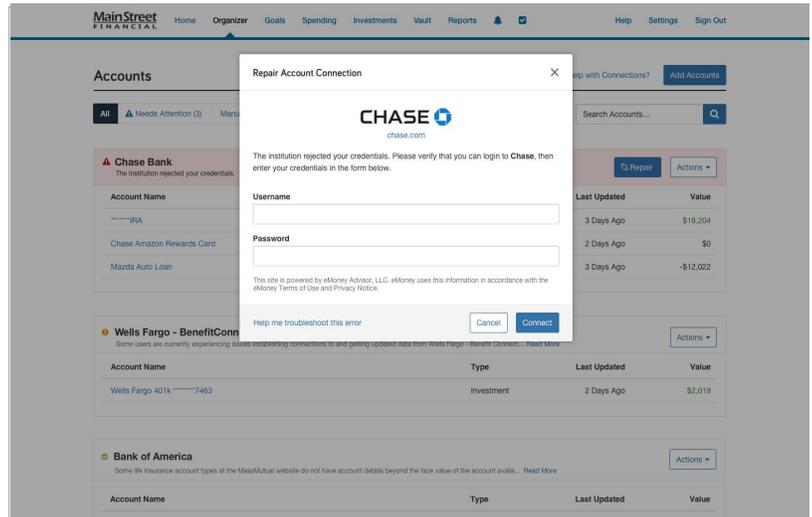
Filter by:

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



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.

