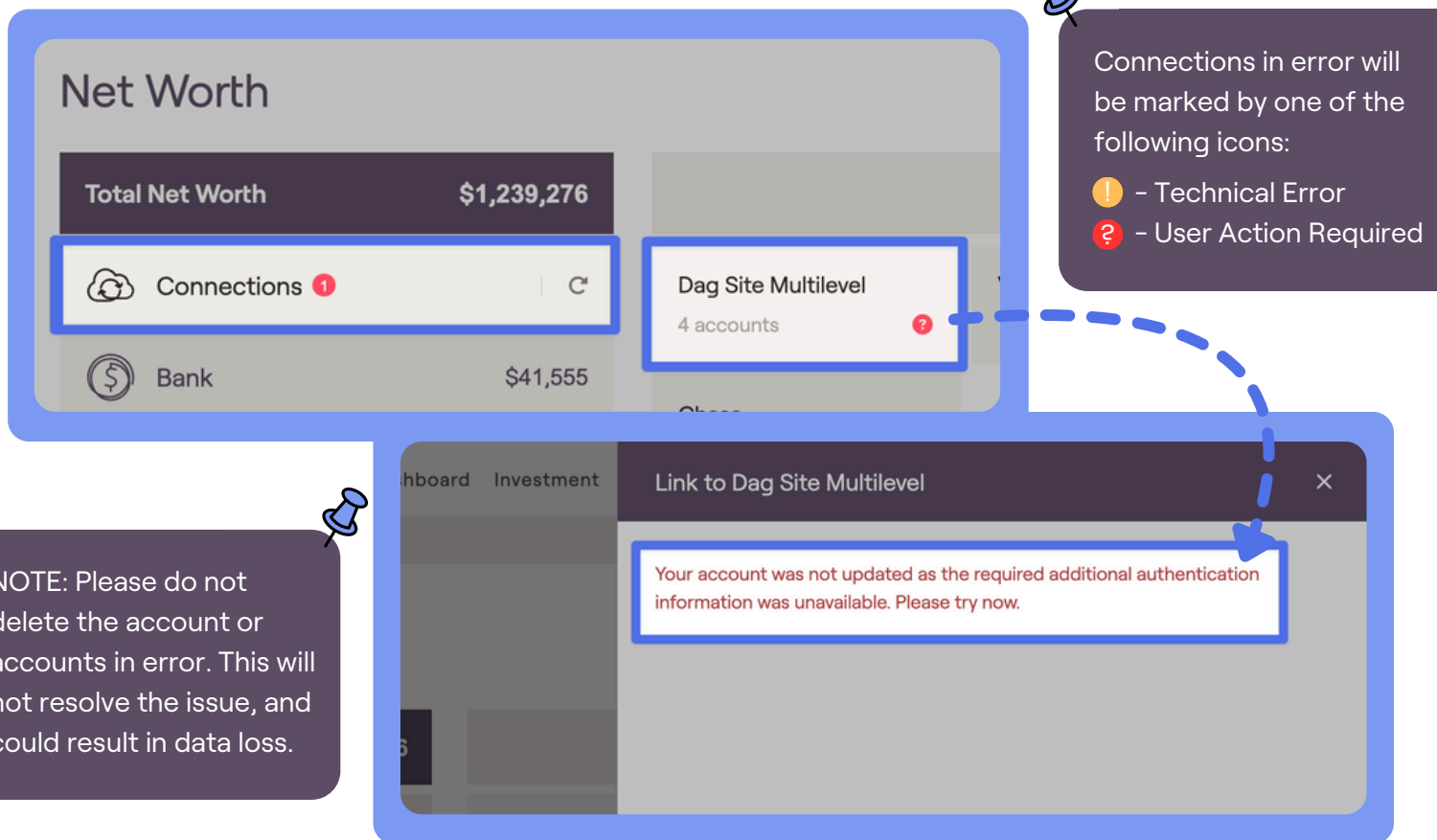


Error Message Troubleshooting Guide

Linked accounts in RightCapital may sometimes experience errors that prevent the account information from updating. When this happens, navigate to the Connections menu in the Profile > Net Worth tab to identify if there are any errors occurring. If a connection is in error, click on that tile to view the error message:



Net Worth

Total Net Worth \$1,239,276

Connections 1

Bank \$41,555

Dag Site Multilevel
4 accounts

Connections in error will be marked by one of the following icons:

- ! - Technical Error
- ? - User Action Required

NOTE: Please do not delete the account or accounts in error. This will not resolve the issue, and could result in data loss.

Link to Dag Site Multilevel

Your account was not updated as the required additional authentication information was unavailable. Please try now.

While some errors can take time to resolve, most can be resolved more easily by following just a few simple steps. In this guide you will find a list of the most common error messages, along with a quick explanation and troubleshooting steps for each.

Multi-Factor Authentication (MFA) Error

Your account was not updated as the required additional authentication information was unavailable. Please try now.

Cancel

Refresh

Most financial institutions have Multi-factor authentication (MFA) in place to verify your identity and protect your information. This error message indicates that MFA either needs to be set up initially, or re-completed for that institution.

Step 1

If you have not set up MFA for this institution, you should visit their site and do so now.

Step 2

After confirming that MFA is set up, you can return to RightCapital and click the Refresh button under this error message.

Step 3

Follow the prompts to satisfy the institution's MFA requirements, and re-establish the connection.

Multi-factor authentication typically comes in the form of a one-time passcode. You can usually choose to have this code sent to your phone or email. Once delivered, simply enter the code within the time limit displayed on your screen. Occasionally, MFA may come in the form of security questions for some institutions.

Some institutions will require you to complete MFA regularly after a set period of time in order to keep your accounts connected. You should log into your RightCapital plan often to ensure that your account information stays up to date.



Dag Site Multilevel
64.14.28.129

Please enter the multi-factor authentication detail

Please enter your one time passcode

430 seconds left

[Send new code](#)

Incorrect Credentials Error

Your account is unable to log in due to incorrect credentials.

Cancel

Fix Connection

This error message indicates that the specified username and password were not accepted by the financial institution. Please note that this does not necessarily mean your credentials are wrong; see below for a list of criteria to double-check.

Step 1

Before attempting the connection again, make sure that you've chosen the correct link option. When in doubt, it can be helpful to double-check the URL of the login page that you use to view those accounts, outside of RightCapital. Be mindful of the names and URLs for each link option, and choose the one that matches your institution's login page.

Step 2

With the correct link option identified, check to see if that institution has any unique login requirements. Please be mindful to read the message displayed before entering your credentials; this message will notify you if such requirements exist and provide instructions.

Step 3

With steps 1 and 2 met, try logging in again. If using the same link option, you can click Fix Connection underneath the error message. We recommend typing your credentials manually to ensure accuracy (rather than using a password keychain or autofill feature).



Pro Tip: Click a link option, and then click the blue hyperlink to see if the external site looks correct. You may also see a lightbulb icon, with a hyperlink directly to the login page.



This error can occur if your password is expired and needs to be changed. First, log into the institution's site outside of RightCapital; if this is the case, you should be prompted to update your password. With your new password set, you can return to RightCapital and try again.



Betterment

Betterment
www.betterment.com

Please enter your Betterment login credentials. 

To successfully link your account, make sure you enter your app-specific password created one, please follow the instructions [here](#).

Email

App Password



Open Banking Error

We could not update your account because your consent is required to access the account information through Open Banking. Please provide the consent to access the account information now.

Cancel

Fix Connection

This error message indicates that the financial institution has transitioned to Open Banking, a faster and more dependable way to link accounts. When this happens, connected accounts will stop updating until you follow the steps listed below.

Step 1

Click Fix Connection below this error message.*

Step 2

Follow the steps listed on your screen. This typically involves re-entering your credentials, and accepting a user agreement or terms of service. This process may securely redirect you to the financial institution's website.

Step 3

With these steps complete, you will be redirected back to RightCapital. The connection with the institution will be re-established, and your accounts will refresh automatically.



Not seeing an Open Banking error?

If there is no Open Banking error displayed in the Connections menu, follow these alternative steps before circling back to Step 2:

Step 1a

Click the Link Account button at the top of the Profile > Net Worth tab.

Step 1b

Within the window that appears, type in the name of the financial institution and click on that link option (it should be marked with a green ✓ check icon).

Step 1c

Click the 'Manage Accounts' hyperlink listed under your existing login. From here, you can proceed to Step 2.

Technical Difficulties Error


We could not update your account because your financial institution website is experiencing technical difficulties.

This error message indicates that there is a technical issue preventing your account information from being retrieved. These errors require backend troubleshooting; please reach out to your advisor and notify them of the connection in error. As a reminder, please refrain from deleting the linked accounts from your plan, as this will delay the troubleshooting process and can result in data loss.

Account Locked Error

We could not update your account because it appears your account has been locked. This usually results from too many unsuccessful login attempts in a short period of time. Please visit the site or contact its customer support to resolve the issue. Once done, please update your account credentials in case they are changed.

This error message indicates that your account has been locked by your financial institution. When this happens, visit the institution's site outside of RightCapital to see if you can log in and view your accounts. If yes, circle back to RightCapital and trigger a manual refresh (click the circular arrow icon next to your total net worth). If no, reach out to the institution's customer service team to have your account unlocked before attempting a refresh.



Not seeing your error message?

If you are experiencing an error that you don't see listed in this document (or if the steps provided here do not resolve your error) please reach out to your financial advisor for further assistance. When reaching out to your advisor, provide them with as much detail as possible about the issue to help expedite the troubleshooting process:

- Which financial institution and/or specific accounts are experiencing an error?
- What is the URL of the login page that you use for these accounts, outside of RightCapital?
- What issue is occurring, and at which step of the linking process?