

MSA Support Site Overview FY18

OFX Connectivity Group Support Team

Last updated 2018-05-14

Table of Contents

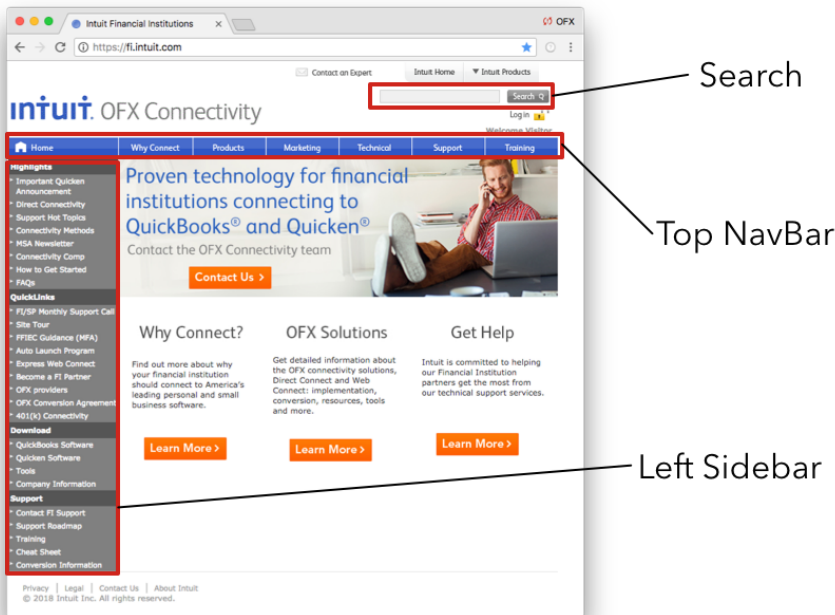
Introduction.....	2
Navigating fi.intuit.com.....	2
Your Account	2
FI.INTUIT.COM Resources.....	3
Support Cheat Sheet.....	3
Help Documents.....	3
Error Codes.....	4
Log File Translation Tools.....	4
About Product Support	4
Free Software for Your Team	4

Introduction

This document is a quick overview of the fi.intuit.com support site. The "fi" in the URL stands for "financial institution" (FI), although fi.intuit.com offers a wide range of resources. Please share this information with anyone in your organization that might find it useful.

Navigating fi.intuit.com

The support site has two navigation areas: the NavBar and the Sidebar. The NavBar links to major subject areas, while the Sidebar links to specific topic pages.



If you can't find what you are looking for, you can use the Search field. Just type keywords into Search to see a list of pages with those terms.

Your Account

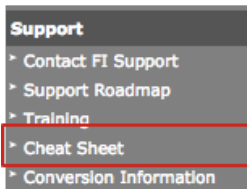
The fi.intuit.com login is part of your organization's agreement with Intuit. User IDs and passwords for fi.intuit.com must not be shared outside of your organization. If you forget your login information, your Account Manager can help.

FI.INTUIT.COM Resources

Support Cheat Sheet

You can find a handy reference card if you click Cheat Sheet in the Support section of the sidebar. You can print the Cheat Sheet and Cube Card, and the Cube Card has clickable URLs if you view it in a PDF reader. If you print the cube card, and you're good with scissors, you can even make a handy card stand for your desk.

Click here for the page <https://fi.intuit.com/support/tool/cheatsheet/>, or you can go to the support site and click the Cheat Sheet link in the left sidebar.



Help Documents

The support site offers a wide range of topical help documents, from "Top Online error codes" to "Quicken Windows Matching Logic. To find them, use the Search field, click Support on the Menu Bar and click one of the More Support Resources and Tools,Ä¶ links, or click this link: https://fi.intuit.com/support/resources_tools.

Support Resources & Tools	
↓ Resources	
<ul style="list-style-type: none">▶ Quicken Technical Support<ul style="list-style-type: none">▪ Quicken Support▪ Force Branding & Profile Updates	<ul style="list-style-type: none">▶ QuickBooks Technical Support<ul style="list-style-type: none">▪ QuickBooks Support Homepage
<ul style="list-style-type: none">▶ FI CSR Support<ul style="list-style-type: none">▪ FI merger/Service Provider change-Conversion Information	<ul style="list-style-type: none">▶ Quicken and QuickBooks Training<ul style="list-style-type: none">▪ QuickBooks Fee-Based Training
<ul style="list-style-type: none">▶ Customer Communication Templates	<ul style="list-style-type: none">▶ Technical Documentations<ul style="list-style-type: none">▪ Quicken Data Mapping Guide▪ QuickBooks Data Mapping Guide▪ OFX Specification
<ul style="list-style-type: none">▶ Security	<ul style="list-style-type: none">▶ Product Information<ul style="list-style-type: none">▪ Quicken Windows Matching Logic

Error Codes

Sometimes things don't work, so end user customers will submit issues to your support team with Quicken or QuickBooks error codes. Although some errors have explanatory text, many have nothing about the cause; the customer may report that things aren't working, or that they can't download transactions into their product.

- In Quicken for Windows, the error codes appear in the One Step Update Summary window.
- In QuickBooks, errors appear as a note when a download fails.

Log File Translation Tools

Solving online banking problems normally requires that you gather and interpret log files. Fi.intuit.com has a Tools link in the Download section of the Sidebar, or you can use this link: <https://fi.intuit.com/support/tool/>. (Link requires login.)

Click here to find log files in Intuit products: <https://fi.intuit.com/support/logfileslocation.cfm>

Three tools are especially useful to translate log files: the OFX Viewer Tool; the QuickBooks ofxlog.txt De-encryption Tool; and the OFX Formatter.

The OFX Viewer Tool downloads with a guide. Please read it so you can learn how to use the tool.

The QuickBooks De-encryption Tool downloads with a ReadMe file that helps you translate QBO files.

Download the OFX Formatter tool to configure a translated QBO file. This tool also includes a user guide.

About Product Support

Customers will call your help line looking for product support. Fi.intuit.com has a chart that you can use to quickly guide these customers to the proper support channel at Intuit. To find the guide, click Support Roadmap in the Support section of the Sidebar or go to <https://fi.intuit.com/support/roadmap/>.

The roadmap lists support options for all OFX-related products, as well as hours of operation, estimated response times, and any applicable fees. FI support agents will see resources for their use in the Available only for Customer Support Representatives area.

Free Software for Your Team

Did you know that being an Intuit Financial Institution partner entitles you to download products so that you can perform your own tests and get to know Intuit products better? You will see product download links in the Download section of the Sidebar. You can also use these links:

QuickBooks - <https://fi.intuit.com/products/download/quickbooks/>

Quicken - <https://fi.intuit.com/products/download/quicken/>