

Resources for Financial Institution Partners

Support Cheat Sheet

Please note your login credentials:

<http://fi.intuit.com>

UserID

Password (Keep This Secure)

Knowledge Base Links for Common Problems

QuickBooks Data File issues:	http://support.quickbooks.intuit.com/support/Pages/KnowledgeBaseArticle/1002282
Online Service Error Codes in Quicken:	http://quicken.intuit.com/support/articles/online-services/download/5396.html
Quicken Data File issues:	http://quicken.intuit.com/support/help/advanced-troubleshooting-to-correct-problems-with-quicken-data-files/GEN82035.html

Financial Institution Support Topics

Resources

Monthly Support Call

<http://fi.intuit.com/newsletter>

Product Resources Page

<http://fi.intuit.com/support/>

Advanced Tools

<http://fi.intuit.com/support/tool>

Discontinuation Info

<http://fi.intuit.com/discontinuation/>

OFX or System-Wide Issues

Please submit an inquiry; include details about the issue, as well as OFXlog and ConnLog.

(For help locating the log files, see:

<http://www.fi.intuit.com/support/logfileslocation.cfm>)

Orientation Materials

Getting Started Guides

<http://fi.intuit.com/support/gsg/>

Support Site Tour

<https://fi.intuit.com/support/sitetour/>

Documentation and Training

Quickbooks Manuals

<http://support.quickbooks.intuit.com/support/Articles/INF12758>

QuickBooks Training

<http://quickbooks.intuit.com/product/training/quick-book-training.jsp>

Quicken Products

<http://quicken.intuit.com/>

Contact Support

Monday-Friday 5AM-5PM PST

<https://quicken.custhelp.com/app/contact/>

Support Site

<http://quicken.intuit.com/support/index.jsp>

Product Updates

<http://quicken.intuit.com/support/help/quicken-update-files/GEN82197.html>

Intuit Community

https://qlc.intuit.com/app/full_page

QuickBooks Products

<http://quickbooks.intuit.com/>

Contact Support

Monday-Friday 6AM-6PM PST

800-450-8256 (charges may apply)

<http://support.quickbooks.intuit.com/Support/ContactUsPhoneList.aspx>

<http://fi.intuit.com/contactus/>

Support Sites

QuickBooks Desktop

<http://support.quickbooks.intuit.com>

QuickBooks Online

<https://support.qbo.intuit.com>

Product Updates

<http://support.quickbooks.intuit.com/Support/ProductUpdates.aspx>

Intuit Community

<http://community.intuit.com/quickbooks>

Basic Fact Finding - Ask Probing Questions

	Key Questions	Details
Version?	Product Version? Patch Info?	Quicken: Open Quicken. Go to Help >> About. Quickbooks: Open QuickBooks. Press F2.
	Key Account # and Financial Institution Settings	Open Quicken or QuickBooks. CTRL-A >> Choose Edit Account. Click on General Services tab to verify account number and Financial Institution. Click on Online Services to verify connectivity method (Quicken only).
Affected?	Does it affect one or many users?	Widespread errors can indicate a server-side issue.
What?	Any more details? Is there an Error Code?	Get the error code or a detailed description of the issue (screenshot if possible)
When?	Has it ever worked before? When did it stop working? Was something else going on?	Get details about any recent changes. Find out if user recently upgraded, got a new computer, or changed network connectivity in some way. See connectivity troubleshooting steps on Quicken support site: http://quicken.intuit.com/support/articles/getting-started/setting-up-quicken/5830.html .
Steps?	Get exact steps to reproduce the issue.	Sometimes reconnecting solves connectivity issues. Retrace the steps. Is the problem intermittent? See support site for more error information.

Narrow Problem to Root Causes

Error Type	Example	Likely Root Cause & Resolution
Application	Application feature not working correctly, or not reproducible.	Likely Cause: <i>Out of Date Software</i> Resolution: Get latest product update .
User	Complex feature causing confusion or difficulty.	Likely Cause: <i>Complicated Software</i> Resolution: Review User Manuals and Learn about Downloading Transactions in the Help Menu .
Data File	Experienced user with random disappearing data.	Likely Cause: <i>Data File Issue</i> Resolution: Test in a New Data File (Quicken) or New Company (QuickBooks). Also, check Support Site for Data File Issues: Click here for Quicken: http://quicken.intuit.com/search/search-results.jsp?orgn=headersearch&q=data+file Click here for QuickBooks: http://support.quickbooks.intuit.com/support/search2.aspx?q=data%20file
Intuit Server	Persistent parser errors during data download.	Likely Cause: <i>Invalid OFX data</i> during data download, <i>script error</i> , or <i>server unavailable</i> due to maintenance. Resolution: If problem persists, Contact OFX Support
Local Computer/ Browser	Download fails with error code.	Likely Cause: <i>Configuration Error or Browser Issue</i> Resolution: Check connectivity troubleshooting steps on Quicken support site.

If you are unable to resolve the problem please submit an inquiry at <http://fi.intuit.com/contactus/>. Include all the details you have collected about the problem and remember to attach the OFXLOG and CONNLOG files.