

Post-Conversion Support Process (PCS) and Resources

The post-conversion support phase is the time period just after you are live on the new platform. This varies based on your online banking service provider or conversion service agreement. As part of the conversion project, we want to ensure your users can connect within Intuit products.

Please reference your Post Conversion Support Email for the dates.

The two phases as applicable:

1. **First 48 hours** post launch
 - a. During the first two days, we really want to be sure the WebConnect and/or Direct Connect are working as designed
 - i. Both connectivity options are available and should be tested internally
 - ii. If any issues are reported, you reach out directly to your PM

REMINDER: Intuit aggregation services (Express Web Connect) will be interrupted for up to 5 business days

2. **The remaining time of your post conversion support period (varies by contract)**
 - a. During this period, you will be submitting all issues via the partner site directly
 - i. <https://ofx-partner.intuit.com/app/fi/ContactUs>
 - b. This channel is dedicated for Intuit financial partners only, please do not send an end user through this portal, they will be referred back to you for assistance
 - c. There is a 24/48 hour SLA on post-conversion support inquiries, these will take a priority
 - i. Please be patient
 - ii. If you have any urgent issues, you can reach out to your PM as your main point of contact
 - d. Please see the steps below on how to open a ticket/inquiry
 - i. It is **extremely important** that you follow the instruction
 - ii. If you do not submit the inquiry properly, there may be a delay in response time
 - iii. Be sure to review "what should be included by product"
 1. Submitting as much detail will help the shorten resolution time

Opening a ticket/inquiry

Complete all required fields and submit

- Enter your contact info
- Issue Type: **Support**
- Technical Assistance: Select Product
- Subject: Should include your Intuit Project Summary
 - This can be found on all emails referencing your conversion project
 - **PCS for Intuit Project #1234 – ABC Bank moving to XYZ (go live TBD)**
- Description: Should include details of the issue and what steps are taken by the user when they get the error... basic troubleshooting details
 - Quicken EWC – Updated website now EWC is not working Error 502
 - Quicken Mac - Error 9999 Member unable to connect to FI to download transactions
 - Users getting 102 in QuickBooks Online
- Number of end users impacted
- Connectivity Method used
- Attach logs
- Attach screenshots
- Submit
- You will receive two confirmations that the ticket/inquiry was submitted;
 - Once you click submit, you will be provided an Inquiry #
 - You will receive an auto response letting you know we received your inquiry submission

You will need to create your login credentials, if you do not already have them.
(<https://www.intuit.com/partners/financial-institutions/professional-services/ofx/>). **If a prompt stating that one is not authorized, please have them contact quickinfo@intuit.com for assistance.**

What should be included in the inquiry/ticket

Quicken Desktop – Direct Connect

- OFX
- Conn Log
- HTTP Log (Quicken ONLY)

Quicken Desktop – Web Connect

- Error Message
- .QFX file

QuickBooks Desktop Direct Connect

- OFX (~QBOFX32)
- ConnLog

QuickBooks Desktop Web Connect

- .QBO file
- Error Message

Mint

- Subscription email address
- Error message
- Screenshots

QuickBooks Online (QBO)

- QBOE CompanyID
- Email address used for the subscription
- Screenshots

NOTE: To obtain the Company ID

1. Click on the gear in the upper right corner
2. Click on Company Settings (Account and Settings)
3. Click on Billing Info, above the Company Name you will see the Company ID

- You can also use the following
 - o ctrl + alt +?

QuickBooks Self Employed (QBSE) please provide

- Email address used for the subscription
 - o Screenshot

Addition resources for support

Support Homepage - <https://ofx-partner.intuit.com/app/fi/SupportHome>

- Access all product downloads
- General Support Information

Log files - <https://ofx-partner.intuit.com/app/fi/LogFileLocation>

New User Getting Started Gides - <https://ofx-partner.intuit.com/app/fi/GettingStarted>