USAA_Moneydance_User_Walk_Through – (Version 9)

This is a walk through on making USAA OFX downloads work again within Moneydance. USAA changed things on January 26, 2021, and the USAA profile currently in Moneydance stopped connecting. This process creates a new custom USAA profile which works.

STEP 1 – Gather information from the USAA/Quicken relationship.

- You need three items from USAA: **client_id, Access ID, and Access Pin**.
- LOGIN to your USAA account. Use your normal online id and password/pin.
- Enter https://www.usaa.com/accessid into your browser.
- You will see the following page where we can retrieve your client_id.
- *Do not allow Quicken access just yet as that will direct you to another page*.
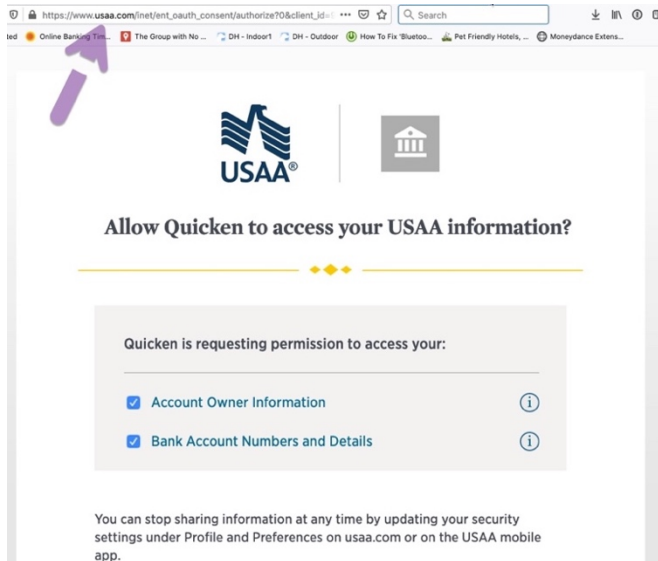
On this screen, you should copy all the text in your web browser address bar (see the purple arrow) and paste into a text program like TextEdit, Notepad, Word etc.

The following is an example of the information you'll see:

https://www.usaa.com/inet/ent_oauth_consent/authorize?0&**client_id=12345678-abcd-efgh-ijkl-123456789abc**&redirect_uri=https://df3cxservices.1fsapi.com/casm/usaa/connect&scope=usaa.profile.member.read+usaa.bank.aggregation.read&response_type=code&code_challenge=my_challenge&state=my_state&code _challenge_method=plain&session_id=nonothere-nope-nope-nope-clientidisit

Note the client_id. It is 36 characters (including hyphens) consisting of 8-4-4-4-12 items.
xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx

Create a new separate text file where you can store client_id, Access ID, and Access Pin.

Make sure you haven't taken note of the session_id by mistake. We do not need the session_id as it changes.

Open your web browser to the same page as before and click 'Allow' to authorize access with Quicken. On the next page, you'll see your Access ID and Access PIN.
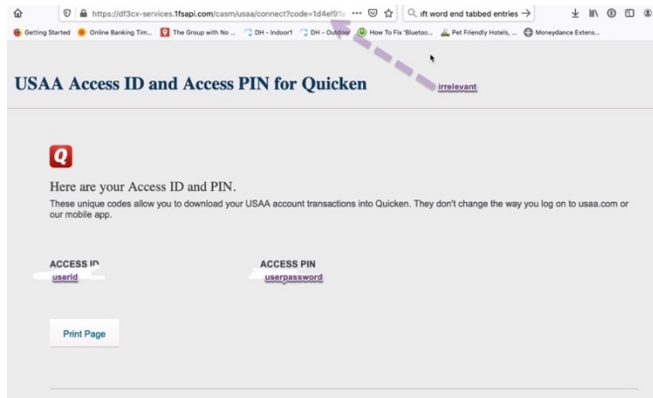
The Access ID is your new OFX userid and the Access PIN is your new OFX password.

Copy both fields into the same document as the client_id.

At this point, you should have one document that contains your client_id, OFX userid and OFX password.

If you somehow missed an item, just start over. The three values are consistent and do not change. After following these steps, you will receive an email from USAA stating you've allowed Quicken to access USAA.

STEP 2 – Run the Toolbox extension

If you do not have the Toolbox extension installed, you must install and open it.

If you have an existing USAA profile, you should delete it:
>   Toolbox Options/Advanced Mode
>   MENU: Online Banking (OFX) Tools
>   Delete OFX Banking Service / Login Profile
>   Choose the existing USAA profile to delete it.

You then "prime" a new USAA profile with the information you gathered above.
>   Toolbox Options/Advanced Mode
>   **USAA ONLY: (NEW METHOD) Manually 'prime'/overwrite stored Root UserIDS/ClientUIDs**

STEP 3 – Use Moneydance as before

Setup your USAA accounts as before by using online setup. The correct financial institution to choose is USAA Custom Profile.

TOOLBOX extension creator: Stuart Beesley; Instructions by dtd
Updated: 2021/11/02 Version 9