



# BUSINESS SMART WEB APP

## PERSONALIZED ACCOUNT CREATION AND ACCESS

All of the members of Dakota West Credit Union are automatically set up with online account access through our consumer platform. However, some members, both companies and individuals, have advanced business needs that require additional account services. When necessary, we provide customized account access using a business account access platform.

Similar to our consumer platform, our business smart web app allows our members to conduct everyday business, including Bill Pay, Remote Deposit, transfers between accounts, loan payments, Pay A Friend, and eStatement access. In addition, members can create bulk ACH payments, process wire transfers, assign individual roles to include external individuals (like accountants or bill payment companies), and download transaction histories into Quicken and QuickBooks uploadable files.

## QUICKEN AND QUICKBOOKS

Many of our members utilize third-party software to manage their household or small-business expenses. If you currently utilize these services and wish to be able to download your transaction history into either of these formats, we can create a personal business account with secure access to assist you in accessing these files.

Please send your request via email to [dwcw@dakotawestcu.org](mailto:dwcw@dakotawestcu.org) and we can assist in getting access to this file format. The process takes a few days to establish and we will authenticate your access and create a unique login for your account.

## THIRD-PARTY USER PROFILES

When tax season rolls around, many of our members utilize accountants to handle the task of preparing business taxes. Others simply have record keepers who handle the paperwork of conducting business. Some need full access, while others may just need the ability to view or download records, but not conduct business transactions. Whatever level of access your business partners need, we can establish relationships to some or all of your accounts.

Please send your request via email to [dwcw@dakotawestcu.org](mailto:dwcw@dakotawestcu.org) with your contact information so we may begin the set-up process and learn more about the level of access you need for your business partners.

## WIRE TRANSFERS AND SELF-SERVICE ACH PAYMENTS

Dakota West Credit Union currently offers wire transfer services and ACH bulk payments, and beginning in Summer 2020, we will offer our business members the ability to create their own wire transfers and ACH bulk payments through our online platform. If you are interested in these services, please send your request via email to [dwcw@dakotawestcu.org](mailto:dwcw@dakotawestcu.org) and we will reach out to you to begin the process once all of our systems are enabled. In the meantime, please call your local branch, or contact us at 800.411.7590 to speak with one of our Member Service Representatives who can assist you with your payment processing needs.