

# QUICKBOOKS & QUICKEN CONTENT



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WEST

## CONSUMER VERSUS BUSINESS

Whether you are managing a busy corporation or simply maintaining your household finances, many individuals utilize external accounting software, such as Quicken or QuickBooks. Since many users of this software also utilize third-party individuals to access their records, we offer this downloadable file format within our [Business Smart Web App](#).

You do not need to have an incorporated business to utilize our business platform, but because each account is manually created, we do ask that you contact us if you need to have access to the QuickBooks or Quicken software.

## AUTHENTICATING YOUR INFORMATION

To get started creating your custom account, we will need to authenticate information about you and your account. We ask that you speak with one of our business account creation specialists who will be able to verify the level of access you, or your assigned representative, require. Once we create your personalized account, we will walk you through the logon process, provide you access to the unique business website, and be certain you are able to download the files you need.

Please send your request via email to [dwcu@dakotawestcu.org](mailto:dwcu@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.

## QUICKEN AND QUICKBOOKS SUPPORT

While we will create your free, custom account, we are allowing you the ability to download the file formats you need. Once the data is downloaded, depending on whether you have online access or computer-based software, you may follow a variety of steps to upload or import the data. We encourage you to reach out to QuickBooks or Quicken Support directly for assistance with managing your software inquiries. Their services will allow them to have an in-depth knowledge of your software version and the nuances of your business profile within these systems.

## BUSINESS SMART WEB APP ACCESS

When our business account creation specialists assist you in setting up your account, we recommend that you bookmark the webpage since it is a different online site than the Consumer Smart Web App, which you may already be using for your account access. If for any reason you need access to the site and do not have access to your bookmarks, you can always visit [our website and select 'Spend' and 'Business Checking'](#). The [Online Business Account Access](#) appears at the bottom of the page.

## BUSINESS MOBILE APP

Because we utilize a separate website for business online access, we also offer a free, business only mobile app. In the Google Play Store or Apple App Store, search "Dakota West Credit Union" and look for the gray **DWCU Biz** icon.

