

## Core Banking (CB\$) Quick Reference Guide

### Log In

- The browser recommended is Microsoft Edge.
- At least weekly, clear the browser history, cache and cookies.
- If you are both an administrator and a user, the login will enable you to see and use both administrator and user functions.

Log In: (NCID)@(customer ID, which is for your agency of 3 letters and 4 #'s) (this is case sensitive)

#### Example:

User Name = melissa@ABC3410

Password = NCID password

- Once logged in, the Notifications page will appear, which may contain important information like interest rates, holidays or maintenance.

### Navigation

- To get to the Dashboard or Functions Menu, click on the words "Core Banking System" logo at the top left of the screen.



- After clicking on the words "Core Banking System", you can then navigate to the Functions Menu by clicking the 3 bars on the top left of the screen or with the dashboard using the direct links to functions, account activity and balance information.



- If you are both an administrator and a user, click the 3 bars on the top left and select from the menu, the role you need. To perform Admin functions, please choose Agency Admin Maker and for User functions, please choose Agency User.

