

Core Banking (CB\$) Quick Reference Guide

New Log-in

- Beginning October 12, you will no longer use the “U” if you are a user or the “A” if you are an administrator after the “@”. If you are both an administrator and a user, your new login will enable you to see and use all administrator and user functions.

Current User Log In: (NCID)@U(customer ID, which is for your agency of 3 letters and 4 #'s)

Current Administrator Log In: (NCID)@A(customer ID, which is for your agency of 3 letters and 4 #'s)

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

Example:

Current log in = melissa@UDST3410

New log in = melissa@DST3410

- Once logged in, you will be on the bulletins page, which may contain important information like interest rates, holidays or maintenance.

Navigation

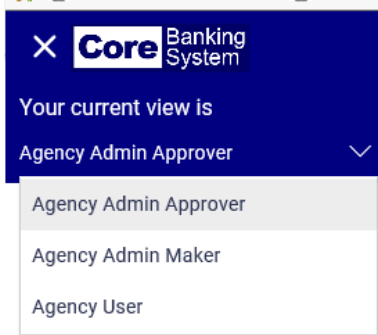
- To get to the Dashboard, you click “Core Banking System” logo at the top left of the screen. The dashboard has direct links to functions, account activity and balance information.



- To get to the Functions Menu, click the 3 bars on the top left of the screen.



- 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.



- For the administrator role select Agency Admin Approver (note: when signing into CB\$ the system will automatically default to this role).
- Select Agency User for the user menu, dashboard and functions.