



March 2025

nCino Admin Guide

Integration Documentation



01. In order for a new client to get started, the client would need to navigate to nCino's portal found at: <https://www.ncino.com/implementation>. This walks the client through the process and will help the new client engage with an nCino implementation team.

02. Once nCino has the new client set up, the client will be directed to Finicity for the onboarding process. In the meantime, the new client can navigate to [Mastercard's developer site](#) found at: [Onboarding | Mastercard Open Banking US | Mastercard Developers](#). The new client would follow the instructions provided and create a project which will trigger sandbox credentials to access the test environment.

03. The same Mastercard's developer site link above will be used for the new client to request production credentials. The production credentials needed in order to engage nCino are:
 - PartnerID** - nCino Username
 - Secret** - nCino Password
 - AppKey** - API Key
 - Experience IDs** - These are Finicity configured borrower workflows that determine what the borrower will see during the Finicity experience. nCino has created new custom JSON values to better distinguish where the borrower will see the experience.
 - a. **Assets_experience_id** – determines what a borrower will see in the loan application for the assets section
 - b. **Employment_experience_id** – determines what a borrower will see in the loan application for the employment section
 - c. **Email_experience_id** – the experience that a borrower will be directed to through email link

04. Once the new client has the production credentials, they should contact their nCino representative. Their nCino representative will work with the implementation team to enter the production credentials the new client received. The nCino team will partner with the new client from testing to production phases of the process.



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