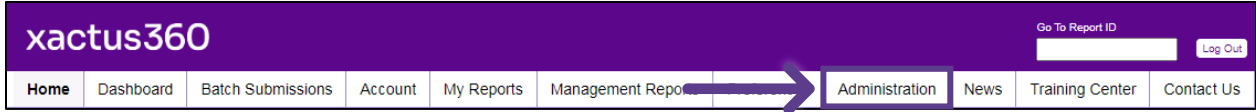


1. Start by logging into Xactus360 and from the home page, click Administration.



2. If you are setup with additional branches, select the branch to add the operator to. If not, you may ignore this step.

Associated Customers						
Code	Name	Company Identifier	City	State	Status	
X0330	XACTUS TEST ACCOUNT		BROOMALL	PA	Active	
X0330AA	XACTUS TEST ACCOUNT		BROOMALL	PA	Active	
X0330AB	XACTUS TEST ACCOUNT		BROOMALL	PA	Active	
X0330AC	XACTUS TEST ACCOUNT		BROOMALL	PA	Active	

3. Click Operators Configured

Customer Details

- Credit Analysis Setup
- Custom Forms
- Custom Field Setup
- Documents
- Operators Configured**

XACTUS TEST ACCOUNT (X0330)

Customer Name:

Street Address:

City / State / Zip:

Sales Rep: Xactus Account Representative

4. Then, click Add New Operator.

Operators Configured

- Return to Customer
- Details
- Show Locked Operators

Operators Configured for X0330

Search Operator:

Operator Name	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xactus Demo	xactus.demo	Yes	Custom	Active	No		07-06-2023, 12:44:05 PM
Xcellent Xactus	xactus.demo2	No	Standard	Active	No		
Xquisite Xactus	xactus.demo3	No	Standard	Active	No		

5. Start by choosing an Operator ID or username. This must be all lowercase and between 3-15 characters. Complete all other fields and sections including Operator Details and Password, Email Communication, Access/Billing, Credit, Rapid/CreditXpert, Property Verifications, 4506/VOE/VOA, and SSNV/LoanShield. When complete, scroll to the bottom and click Add.

Add New Operator

Operator Details and Password

Operator ID: 12/15

Account: XACTUS TEST ACCOUNT (X0330)

Operator Name:

Status:

Lock Template Operator:

Phone Number: Ext:

Cell Phone Number:

NMLS Number:

Email Address: [Send "Welcome" E-mail](#)

Password:

Assign New Password and Notify:

Enter New Password:

Enter New Password (again):

Force Password Change:

Comments:

Email Communication

Access / Billing

Credit

Rapid / CreditXpert

Property Verifications

4506 / VOE / VOA

SSNV / LoanShield

6. If a user should have access to additional branches and files belonging to other users, open Access/Billing and change Restrict View to Custom. If the user should have administrator rights, select Yes next to Customer Admin..

Access / Billing

Restrict View: Custom

Customer Admin: Yes

7. Once the operator is added, click Edit Custom Restrictions.

Access / Billing

Restrict View: Custom

Access Limits:

- Customers**
All Customers
- Operators**
All Operators

[Edit Custom Restrictions](#)

8. Select the Customer (branch) and/or Operator from the dropdown and click Add.

Limit Access to Reports owned by Branch/Department

All Customers

New Limit

Customer

XACTUS TEST ACCOUNT (X0330AA) Add

Limit Access to Reports owned by these Operators

All Operators

New Limit

Operator

Xactus Demo (xactus.demo) Add

9. If the Permissions and Preferences should match those of an existing user, click the operator name from the list.

Operators Configured for X0330							
Search Operator: <input type="text" value="Type to search"/>							
Operator Name	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xactus Demo	xactus.demo	Yes	Custom	Active	No		07-06-2023, 12:44:05 PM
Xcellent Xactus	xactus.demo2	No	Standard	Active	No		
Xquisite Xactus	xactus.demo3	No	Standard	Active	No		
Xtreme Xactus	xactus.demo4	No	Custom	Active	No		

10. Then, on the left-hand side of the screen, click Copy.

Operator Details

- [Return to Operator List](#)
- [Add](#)
- [Move Operator](#)
- [Copy](#)
- [Delete](#)
- [Operator Admin](#)

Details for Operator: Xquisite Xactus (xactus.demo3)

Operator Details and Password

Account:

Operator Name:

Status:

Lock Template Operator:

11. Input the Operator ID, name and email address for the new user. The ID and temporary password will automatically be sent to the new operator upon clicking Save.

Copy Operator

- [Operator Admin](#)

Add New Operator by Copy

Operator Details and Password

Operator ID:

Account:

Operator Name:

Status:

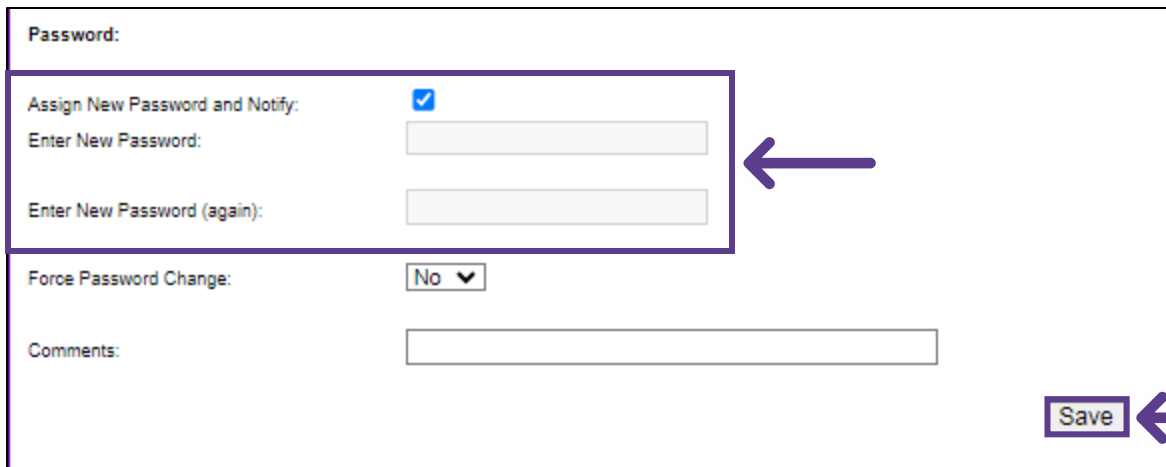
Phone Number: Ext:

Cell Phone Number:

NMLS Number:

Email Address:

12. Scroll down to either enter a password for the user or assign the password automatically and notify them by email. When all is complete, click Save.

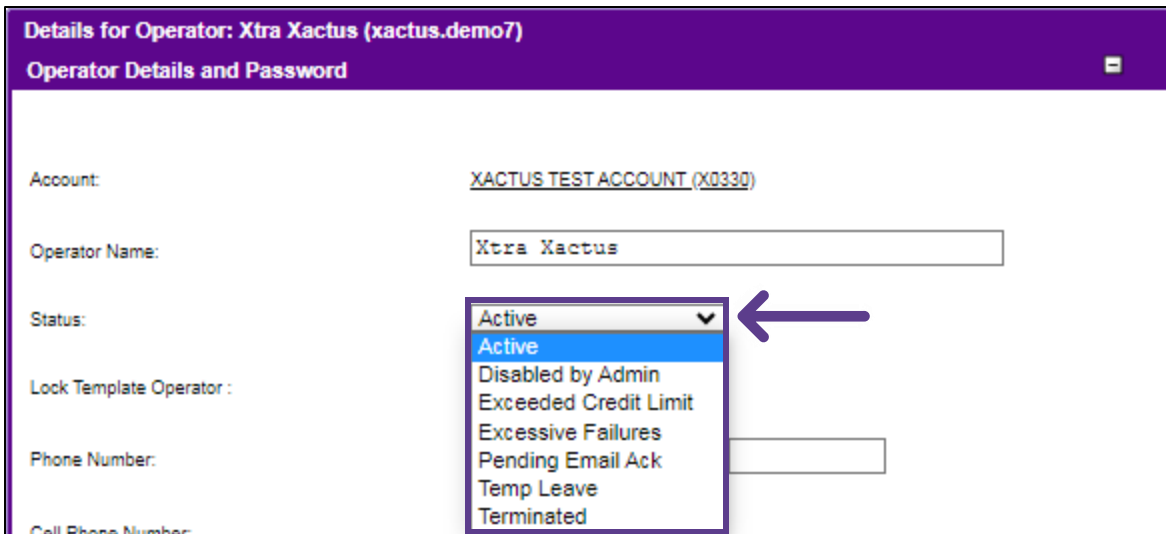


The screenshot shows a form titled "Password:" with the following fields and controls:

- Assign New Password and Notify:** A checkbox that is checked.
- Enter New Password:** A text input field.
- Enter New Password (again):** A text input field.
- Force Password Change:** A dropdown menu currently set to "No".
- Comments:** A large text area.
- Save:** A button located at the bottom right of the form.

Two purple arrows point to the "Enter New Password" field and the "Save" button, respectively.

13. To disable an operators access, click the user from the list and under Status, choose the reason for deactivation. Then, scroll to the bottom and click Save.



The screenshot shows the "Details for Operator: Xtra Xactus (xactus.demo7)" page. The title bar is purple. Below it, the page is titled "Operator Details and Password".

The form contains the following fields:

- Account:** XACTUS TEST ACCOUNT (X0330)
- Operator Name:** Xtra Xactus
- Status:** A dropdown menu is open, showing options: Active (highlighted), Disabled by Admin, Exceeded Credit Limit, Excessive Failures, Pending Email Ack, Temp Leave, and Terminated. A purple arrow points to the "Active" option.
- Lock Template Operator:** (empty)
- Phone Number:** (empty)
- Cell Phone Number:** (empty)

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.