

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

xac	tus36	IS360								
700		Ŭ								Log Out
Home	Dashboard	Batch Submissions	Account	My Reports	Management Repo		Administration	News	Training Center	Contact Us

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

<u>Code</u>	Name	Company Identifier	City	<u>State</u>	<u>Status</u>
<u>X0330</u>	XACTUS TEST ACCOUNT		BROOMALL	PA	Active
<u>X0330AA</u>	XACTUS TEST ACCOUNT		BROOMALL	PA	Active
<u>X0330AB</u>	XACTUS TEST ACCOUNT		BROOMALL	PA	Active
X0330AC	XACTUS TEST ACCOUNT		BROOMALL	PA	Active

## 3. Click Account Details

xact	us360									Log Out
Home	Batch Submissions	Account	My Reports	Management Reports	Preferences	Administration	News	Xactus U	Search	•
Custom	ers Operators									
XACTU	IS TEST ACCOUN	<u>NT (X0330</u>	<u>))_</u> <b>*</b>	Show Locked	<u>Operators</u>	View All Account	<u>s Gro</u>	<u>up 11</u>	→	Account Details
Search o	perators		Add	New Operator						

4. Then, scroll down to Cost-centers Configuration and enter the cost-center names needed next to Add Cost-center.

Cost-centers Configura	ation	
Cost-center:	EAST	Delete?
Cost-center:	NORTH	Delete?
Cost-center:	SOUTH	Delete?
Add Cost-center	$\rightarrow$	Company Default
Add Cost-center		Company Default

11/21/2023

- 5. Once complete, scroll to the bottom and click Save. If more than five groups are needed, additional spaces will populate upon clicking Save.
- Save
  - 6. To add a user to a cost-center, click Operators Configured.

Details	XACTUS TEST ACCOU	NT (X0330)		
Credit Analysis Setup	Customer Name:	XACTUS TEST ACCOUNT		
Custom Field Setup	Street Address:	370 REED ROAD, SUITE 100		
Documents	City / State / Zip:	BROOMALL	PA	19008

## 7. Click a user to view their restrictions.

Search operators		Add New Operato	or		<u>All Account</u>	<u>is Group Man</u>	agement Account D
Operator Name	Operator ID	<u>Admin</u>	Access	<u>Status</u>	<u>SMA</u>	<u>Cost-</u> <u>Center</u>	<u>Last Login</u>
Xtreme Xactus	xactus.demo4	No	Custom	Active	No		10-19-2023, 04:00:1 PM
Xtra Xactus	xactus.demo7	No	Standard	Active	No		10-19-2023, 04:03:2 PM
Xquisite Xactus	xactus.demo3	No	Standard	Active	No		
Xpress Xactus	xactus.demo8	No	Standard	Active	No		10-19-2023, 03:58: PM

8. Expand the Access/Billing section.

Access / Billing

9. Under Billing change the Default Cost-center as needed. When complete, click Save.

Billing	
Default Cost-Center:	Use Customer Default (NORTH) 🗸
Select Cost-Center on Each Request:	No 🗸
Operator Credit Limit:	
Point of Sale Payment:	Use customer default
Point of Sale Payment (CreditXpert):	Use operator default
Point of Sale Payment (LoanShield):	Use operator default
Point of Sale Payment (RescoreX):	Use operator default
Point of Sale Payment (Xcel ScoreX):	Use operator default
Save	