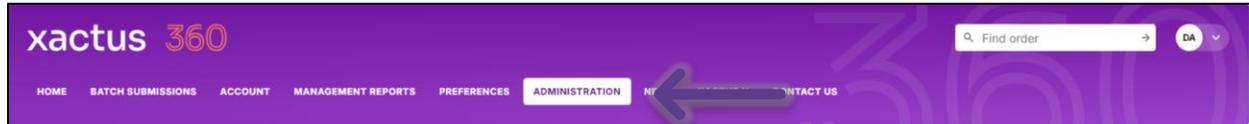


1. Start by logging into Xactus360 and from the home page, click Administration.



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

The screenshot shows the 'Search operators' page with a search bar and a table of operators. A blue arrow points to the 'Code' column.

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. Then, click Add New Operator.

The screenshot shows the 'XACTUS TEST ACCOUNT (X0330)' page. It includes a search bar, a blue 'Add New Operator' button (highlighted with a blue arrow), and a table of operators. Links for 'Show Locked Operators', 'View All Accounts', and 'Account Details' are also present.

Operator Name -	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xactus Appraisal	xactusappraisal	No	Standard	Active	No		07-17-2023, 03:35:34 PM
Xactus Demo	xactus.demo	Yes	Custom	Active	No		07-20-2023, 02:08:00 PM

4. 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 all dropdown sections listed.

Add New Operator
Operator Details and Password

Operator ID: 11/15 ←

Account: [XACTUS TEST ACCOUNT \(DF1234DG\)](#)

Operator Name: ←

Status: ▾

Lock Template Operator : ▾

Phone Number: Ext:

Cell Phone Number:

NMLS Number:

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

Role: ▾ ←

- Accounting
- Administrator
- Branch Manager
- Closer
- IT
- Loan Officer
- Loan Officer Assistant
- Other
- Processor
- Underwriter

When complete, scroll to the bottom and click Add. The user will automatically receive their credentials upon clicking Add.

Password

Assign New Password and Notify:

Enter New Password:

Enter New Password (again):

Force Password Change:

Notes			
Date	Name	Note	Option
		<input type="text"/>	<input type="button" value="Add"/>
5/27/2025 11:45	Diana Agee		<input type="button" value="Delete"/>

Email Communication	<input type="button" value="⊕"/>
Access / Billing	<input type="button" value="⊕"/>
Management Reports	<input type="button" value="⊕"/>
Credit Report X	<input type="button" value="⊕"/>
Pre-Qualification X / QualifyMeNow X	<input type="button" value="⊕"/>
Rescore X / CreditXpert / FICO Score Mortgage Simulator	<input type="button" value="⊕"/>
Undisclosed Debt X	<input type="button" value="⊕"/>
Business Report X	<input type="button" value="⊕"/>
Employment & Income Verification X	<input type="button" value="⊕"/>
Asset Verification X / Deposit Verification X	<input type="button" value="⊕"/>
Tax Transcript X / Social Security Verification X	<input type="button" value="⊕"/>
LoanShield X / Liens & Judgments / Fraud Report X	<input type="button" value="⊕"/>
Flood Report X	<input type="button" value="⊕"/>
Valuation Model X / Appraisal X / Title X / MIP Recording X / Recording X	<input type="button" value="⊕"/>



5. If the credentials are lost or missing, click Send "Welcome" E-mail to re-send the operators user ID. Click Assign New Password and Notify to re-send the operators password.

Operator Details and Password

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:

Operator Password: [Change Password](#)
[Assign New Password and Notify](#)
[Reset Security Questions](#)

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:

Customer Admin:

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

Access / Billing

Restrict View:

Access Limits:

Customers

Operators

[Edit Custom Restrictions](#)

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

The first screenshot shows a section titled "Limit Access to Reports owned by Branch/Department". It contains a dropdown menu currently set to "All Customers". Below this is a "New Limit" section with a "Customer" dropdown menu set to "XACTUS TEST ACCOUNT (X0330AA)" and an "Add" button. A blue arrow points to the "Add" button.

The second screenshot shows a section titled "Limit Access to Reports owned by these Operators". It contains a dropdown menu currently set to "All Operators". Below this is a "New Limit" section with an "Operator" dropdown menu set to "Xactus Demo (xactus.demo)" and an "Add" button. A blue arrow points to the "Add" button.

9. Also under Access / Billing, if the user should be part of a Group, select the group from the drop-down menu.

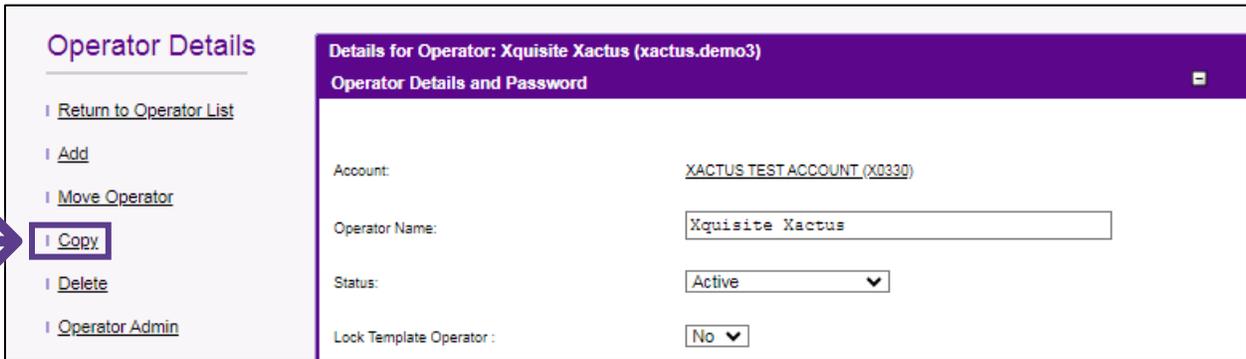
The screenshot shows a "Billing:" section. It includes three dropdown menus: "Default Cost-center" set to "Use Customer Default", "Select Cost-center on Each Request" set to "No", and "Assign Group" set to "GROUP 1". A blue arrow points to the "Assign Group" dropdown menu.

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

The screenshot shows a table titled "Operators Configured for X0330". Above the table is a search box labeled "Search Operator:" with the placeholder text "Type to search". The table has the following columns: Operator Name, Operator ID, Admin, Access, Status, SMA, Cost-Center, and Last Login. The row for "Xquisite Xactus" is highlighted with a blue background and a blue arrow points to it.

Operator Name	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xactus Demo	xactus.demo	Yes	Custom	Active	No		07-08-2023, 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		

11. 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

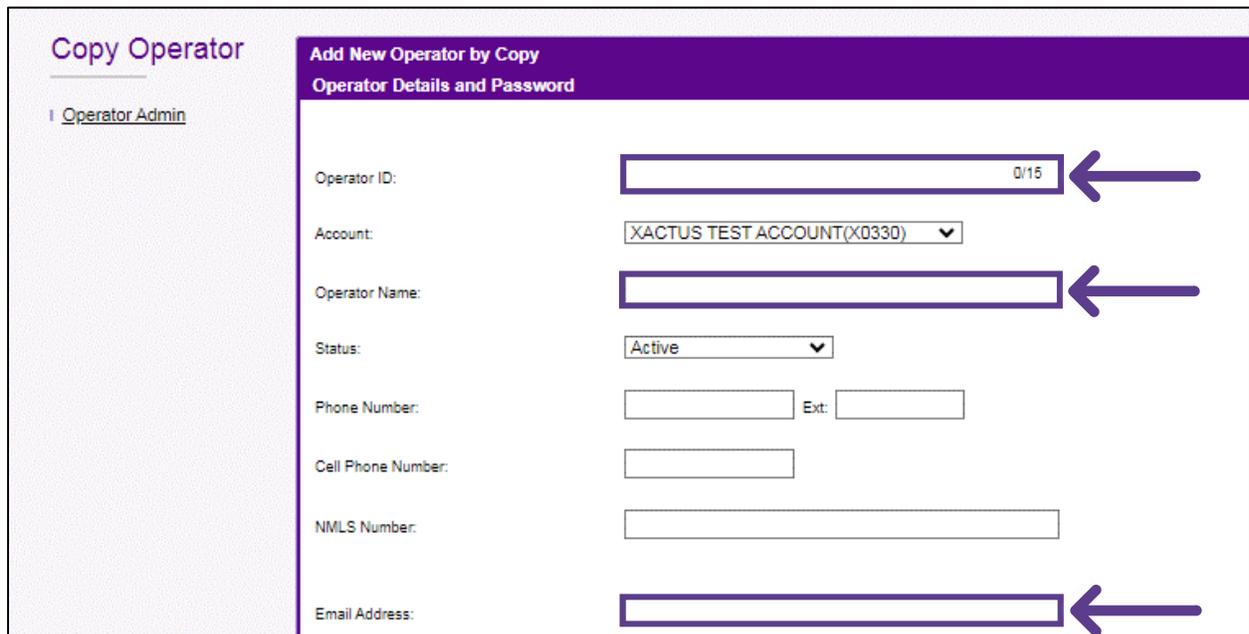
Account: XACTUS TEST ACCOUNT (X0330)

Operator Name:

Status:

Lock Template Operator:

12. 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: 0/15

Account: XACTUS TEST ACCOUNT(X0330)

Operator Name:

Status:

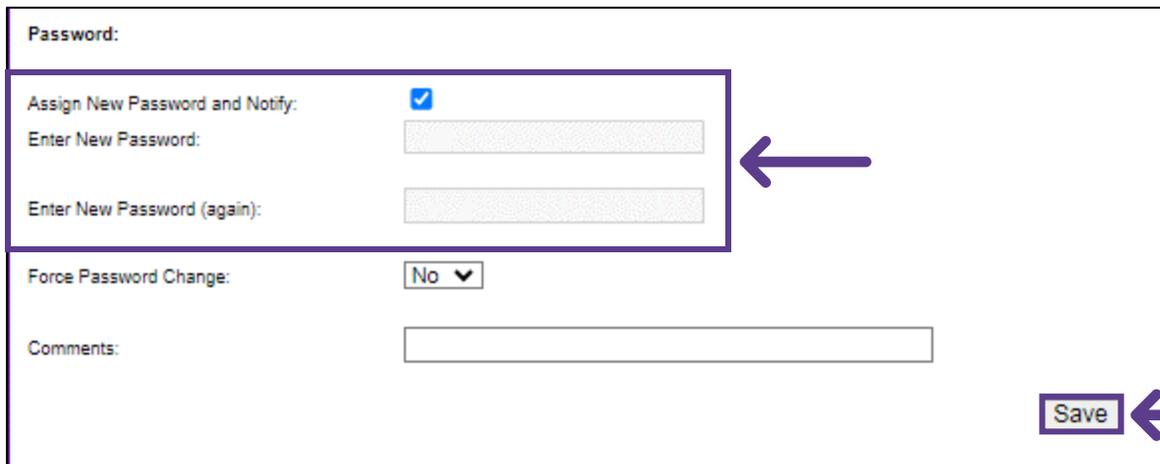
Phone Number: Ext:

Cell Phone Number:

NMLS Number:

Email Address:

13. 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.

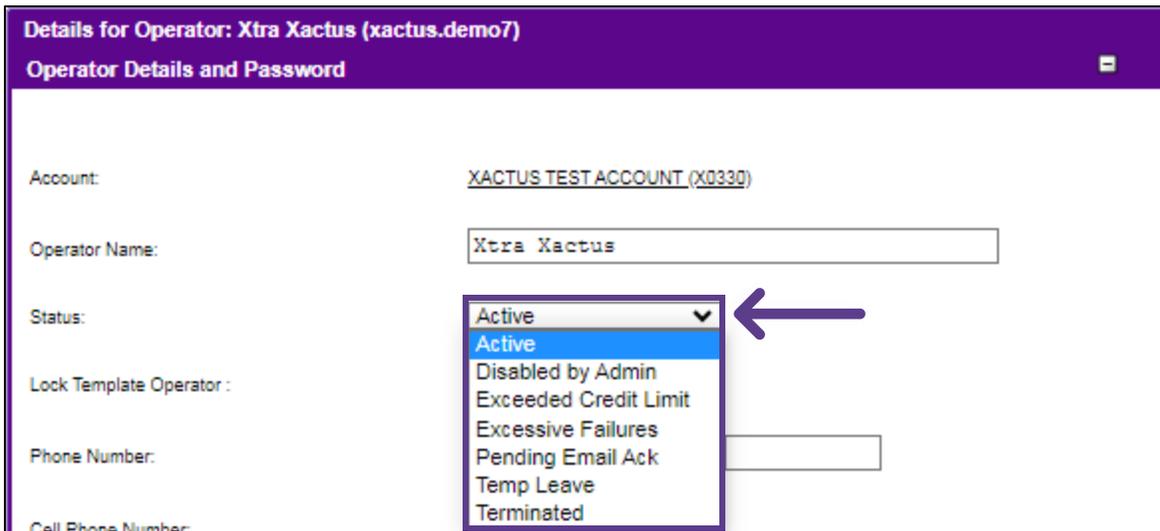


The screenshot shows a form titled "Password:" with the following fields and controls:

- Assign New Password and Notify:** A checkbox that is checked.
- Enter New Password:** A text input field.
- Enter New Password (again):** A second 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.

14. 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 field)
- Phone Number:** (Empty field)
- Cell Phone Number:** (Empty field)

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