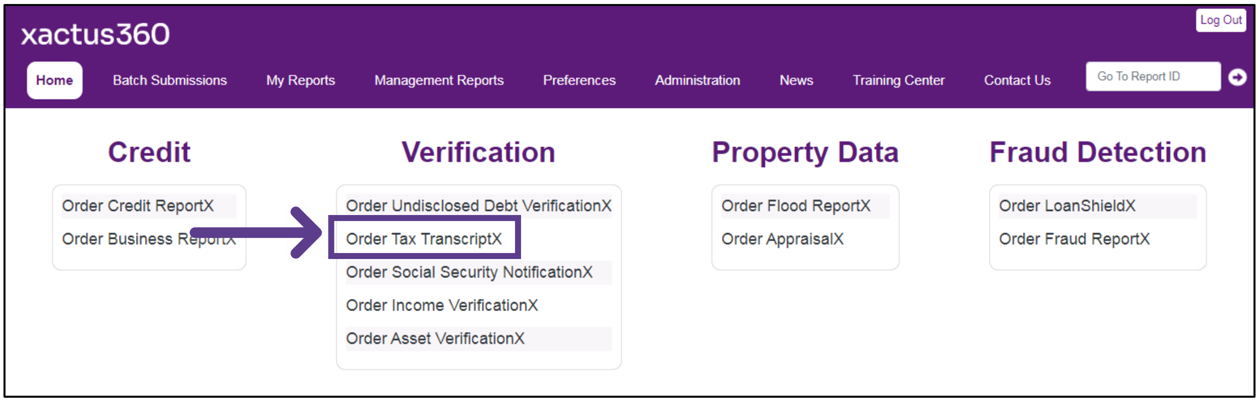
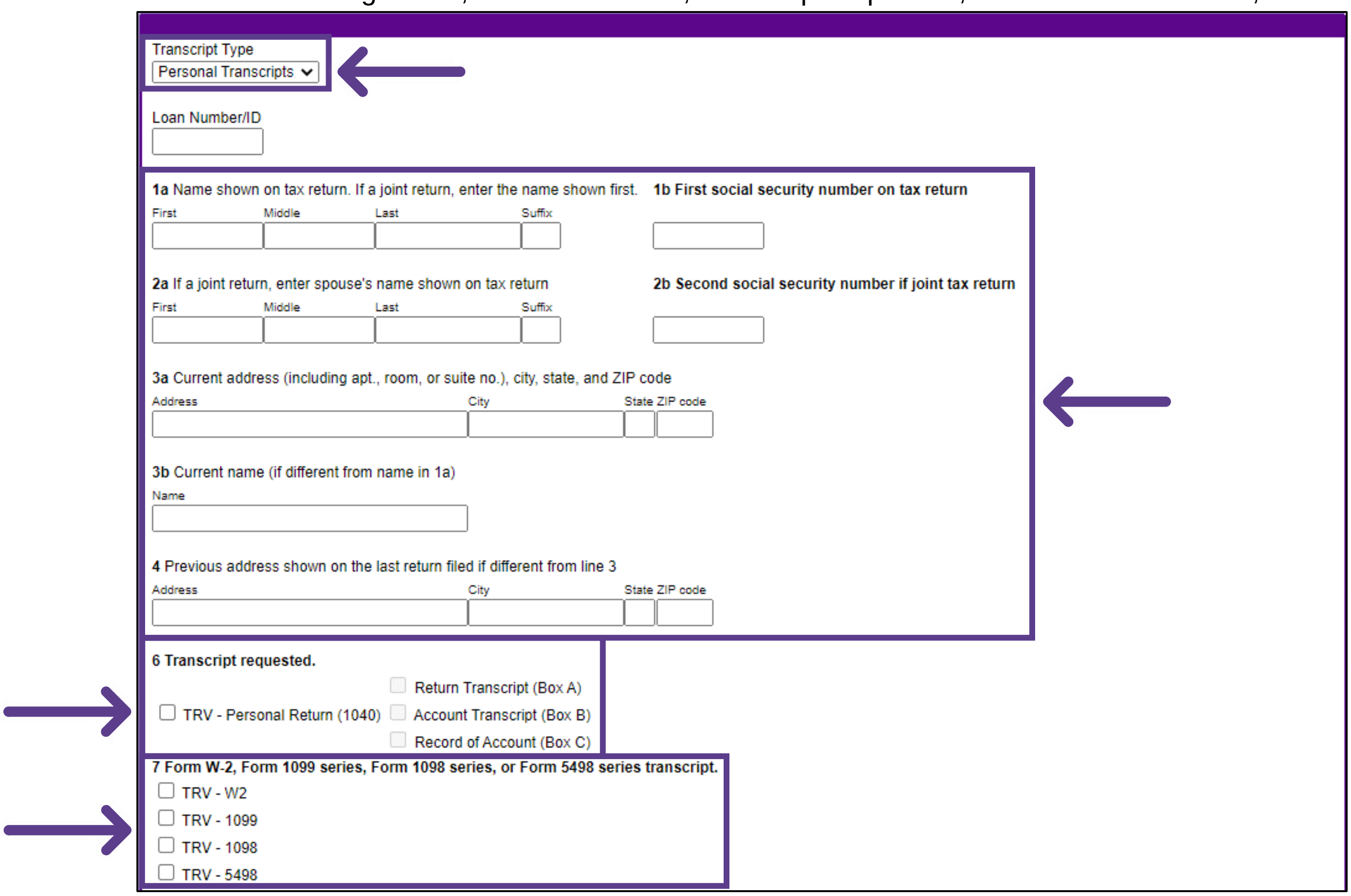
Advancing the Modern Mortgage

How to Order a Tax TranscriptX Within Xactus360

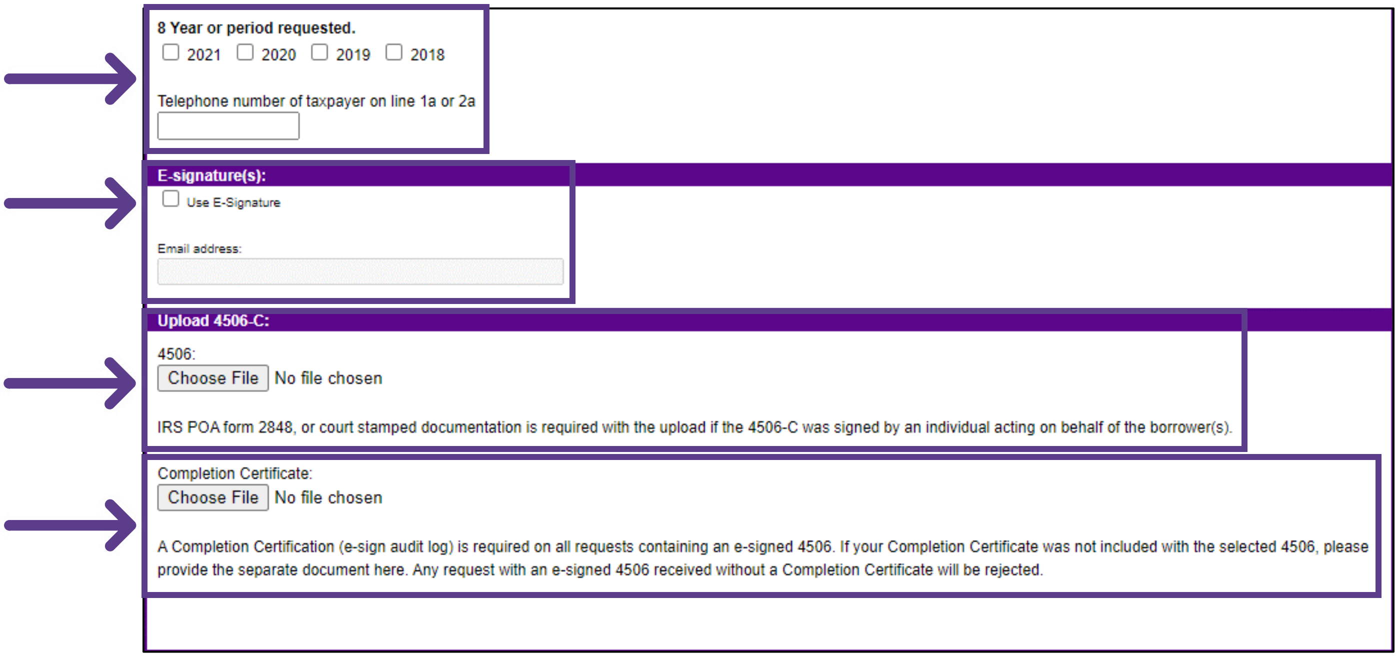
1. Start by logging into Xactus360 and from the home page, click Order Tax TranscriptX.



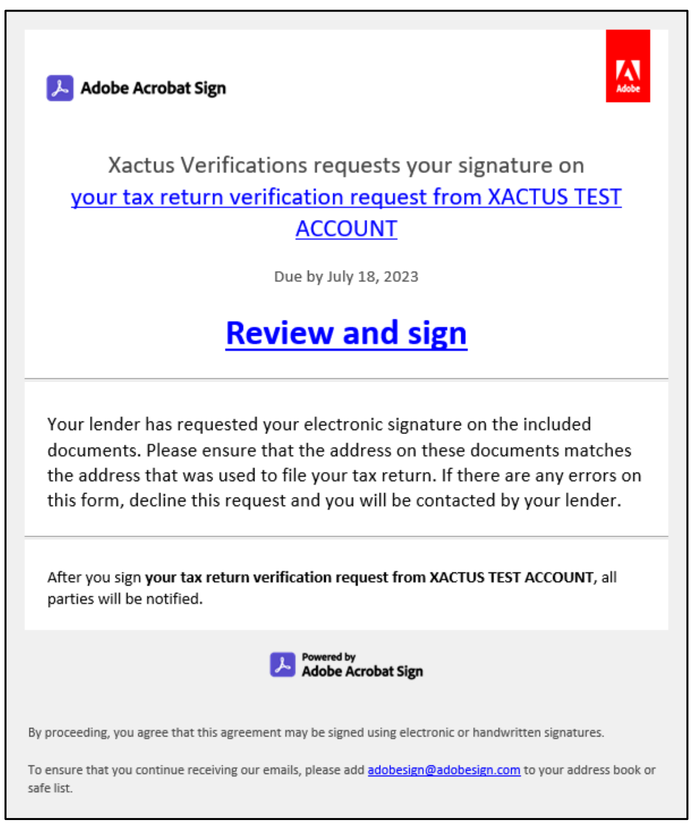
2. Under 'Transcript Type' choose Personal or Business. Then, complete all fields for the order including Name, Current Address, Transcript requested, which Form is needed, etc.



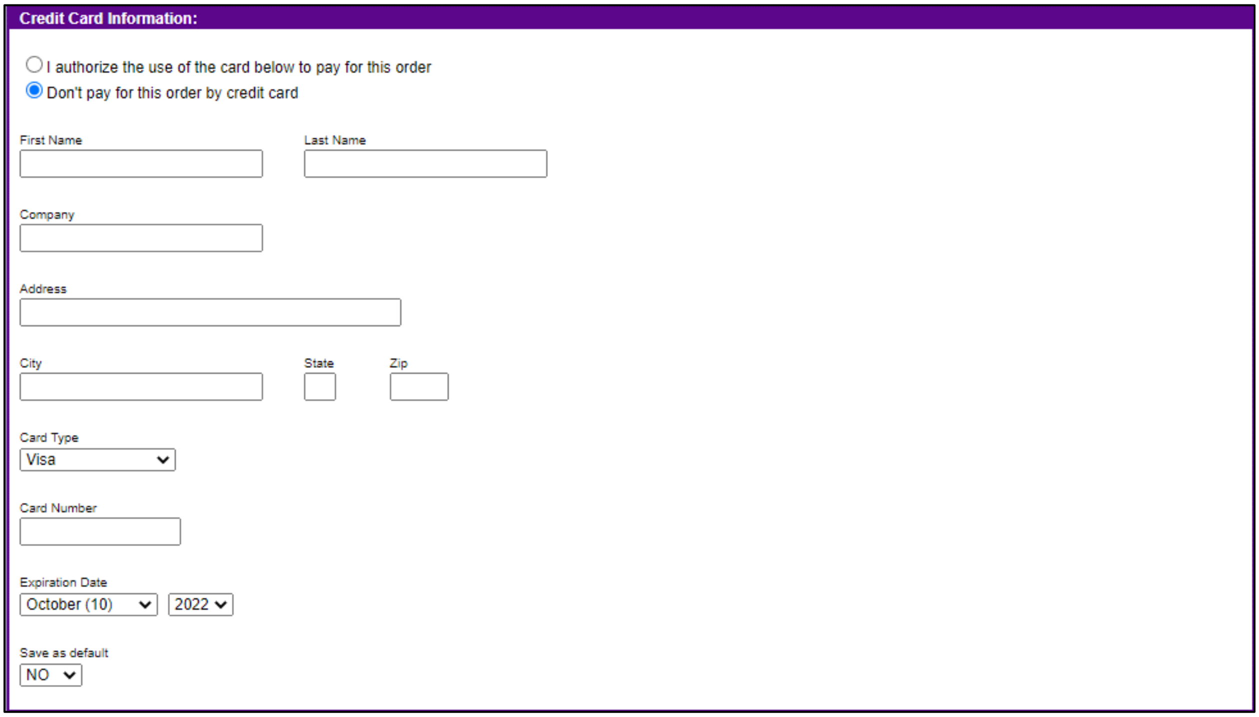
3. Check the box(es) next to the years requested, select whether an E-Signature is being used, Upload the 4506-C and Completion Certificate if E-Signed.



4. If an E-Signature is being used, an email will be sent to the consumer to review and sign the 4506C electronically. There is no need to upload an 4506C document when the E-Signature is used. The email to the consumer looks like this:



5. If you wish to pay by credit card, please fill in this information as well.

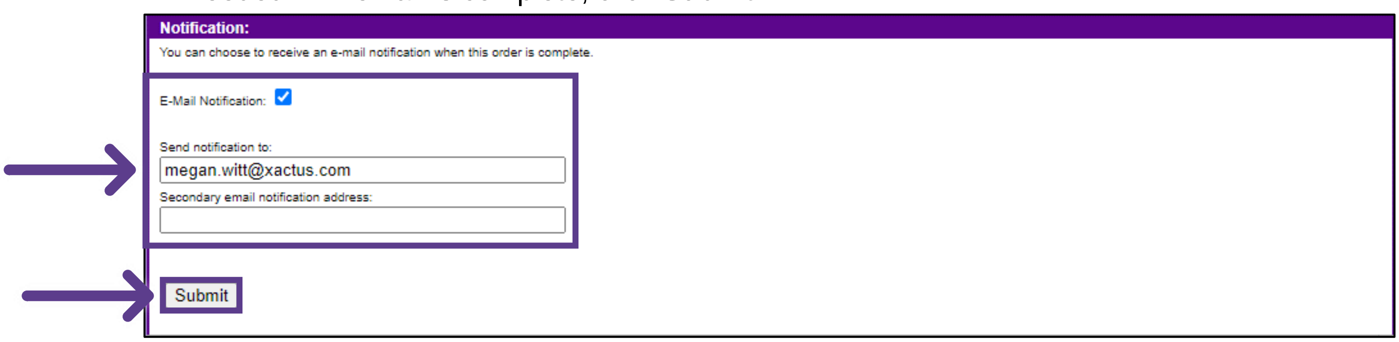


Credit Card Information:

I authorize the use of the card below to pay for this order
Don't pay for this order by credit card

First Name
Last Name
Company
Address
City
State
Zip
Card Type
Visa
Card Number
Expiration Date
October (10)
2022
Save as default
NO

6. Ensure the correct email address is listed for the Notification and enter a secondary email if needed. When all is complete, click Submit.

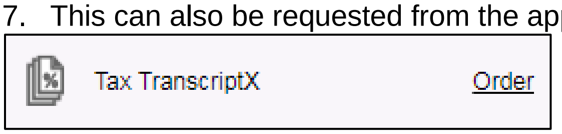


Notification:

You can choose to receive an e-mail notification when this order is complete.

E-Mail Notification:
Send notification to:
megan.witt@xactus.com
Secondary email notification address:
Submit

7. This can also be requested from the applicant screen on the left-hand side.



Tax TranscriptX
Order

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