



HELPFUL TIPS FOR THE X360 OPERATOR SETUP BATCH

REFER TO THIS CHART TO ASSIST WITH COMPLETING THE OPERATOR SETUP BATCH.

	Header	Description
GENERAL OPERATOR INFORMATION	Operator ID	Should correspond to the Operator Name. Must be under 15 characters.
	Operator Name	First Name (space) Last Name
	Operator Email	Must be a company email address
	Phone Number	10-digit number.
	Cell Phone Number	10-digit number.
	NMLS Number	Not required.
	Default Cost-center	Leave blank if Cost-centers do not apply.
	Assigned Group	Assign the user a default group by inputting the group name exactly as it appears in Xactus360, followed by the client code in parenthesis. Access must be set to Custom to use Groups. Leave blank if Groups do not apply.
	Group Access	The user can also be assigned to other groups that they need access to by inputting each group name exactly as it appears in Xactus360, followed by the client code in parenthesis. Multiple groups can be added by separating them by commas with no spaces. Leave blank if Groups do not apply.
	Operator's Personal Credit Limit (\$)	Amount an operator may spend within each month.
OPERATOR SETTINGS AND RESTRICTIONS	Restrict View	Allows the operator to either see just their own files, all files within their branch, or all files for certain branches/users. Restrict = see files requested by self; Standard = see files across the account's users; Custom = see files customized across Operators and Sub Accounts per client preference
	Operator Lock Status	For a new user, input F (False) to ensure the user is active.
	Lock Template Operator	When Yes, provides additional warning when editing a template operator.
	Administrator	Administrators control most account settings, including adding and editing operators, accessing management reports, invoice functions.
	Management Reports access	Access to Management Reports
	Access Account Tab	Shows billing invoices for all users and for accounts(s)
	Block Website Login	To prevent website access. This will disable the users access to change their password.
	Reset Operator Passwords	Typically used by administrators. Ability to reset Operator's passwords
	Unlock Operators	Typically used by administrators. Ability to unlock Operators
	Select Cost-center on Each Request	Leave blank if Cost-centers do not apply.
	Restrict View of Credit Reports	Disables the ability to see any credit reports at all.
	Order For Another Operator	Access to order a report on behalf of another user.

	Reassign Report Owner	Access to change the report owner to another operator.
ORDER CREDIT	Order Credit Reports	Access to request credit in general.
	Order Credit ReportsX	Access to order new credit reports.
	Allow New Borrower Request	Access to request new credit on an already existing file. The timeframes are 1, 5, 7, 15, 30, 45, 60, 90 & 180 days.
	Restrict Rush	No access to rush requests.
	Cancel File	Ability to cancel (repull) a file, if under the number of days required between credit requests on the same borrower.
	Order SupplementX	Access to request supplements.
	Order Refresh Reports	Access to request refresh reports.
	Order Mortgage Only	Access to Mortgage Only reports.
ORDER PRE-QUAL	Order Pre-QualificationX	Access to Pre-Qualification reports.
	Order StartMyApplicationX	Access to StartMyApplicationX. Does not apply if not activated on the account level.
	Order QualifyMeNowX	Access to QualifyMeNowX. Does not apply if not activated on the account level.
ORDER BUSINESS REPORTS	Order Business Reports	Access to Business Reports. Does not apply if not activated on the account level.
ORDER UNDISCLOSED DEBT	Order Undisclosed Debt VerificationsX	Access to UDX product. Does not apply if not activated on the account level.
	Order UDX - Equifax	Access to Equifax UDX. Does not apply if not activated on the account level.
	Order UDX - Experian	Access to Experian UDX. Does not apply if not activated on the account level.
	Order UDX - TransUnion	Access to TransUnion UDX. Does not apply if not activated on the account level.
ORDER CREDIT ANALYTICS	Order RescoreX	Access to request Repository Updates.
	Order CreditXpert Wayfinder	Access to request Wayfinder on credit reports.
	Order CreditXpert What-If	Access to request What-If Simulator on credit reports.

ORDER TAX TRANSCRIPTS	Order Tax TranscriptsX	Access to Tax Transcripts. Does not apply if not activated on the account level.
ORDER INCOME AND EMPLOYMENT VERIFICATIONS	Order Employment VerificationsX	Access to Employment Verifications. Does not apply if not activated on the account level.
	Force Instant	Forces the order of an instant VOE/I before a manual VOE/I request can be submitted
	Access to VOE - Experian Verify	Access to VOE - Experian Verify. Does not apply if not activated on the account level.
	Order VOE - Experian Verify	Access to order VOE - Experian Verify. Does not apply if not activated on the account level.
	Order VOE Reverify - Experian Verify	Access to order VOE Reverify - Experian Verify. Does not apply if not activated on the account level.
	Order VOE/VOI - Experian Verify	Access to order VOE/VOI - Experian Verify. Does not apply if not activated on the account level.
	Order VOE/VOI Reverify- Experian Verify	Access to order VOE/VOI Reverify- Experian Verify. Does not apply if not activated on the account level.
	Order VOE - TheWorkNumber	Access to order VOE - TheWorkNumber. Does not apply if not activated on the account level.
	Order VOE/VOI - TheWorkNumber	Access to order VOE/VOI - TheWorkNumber. Does not apply if not activated on the account level.
	Order TWN 12 MO	Access to obtain onetime instant verification of income for all active/inactive records within past 12 months.
	Order TWN 24 MO	Access to obtain onetime instant verification of income for all active/inactive records within past 24 months.
	Order TWN 60 MO	Access to obtain onetime instant verification of income for all active/inactive records within past 60 months.
	Order TWN Mortgage Select All	Access to obtain one-time instant verification of all active and inactive records. No record filters.
	Order TWN Employment Select	Access to obtain one-time instant verification of employment (active records within past 60 days).
	Order TWN Mortgage Ultimate	Access to obtain VOE or VOI multiple times (up to 4 for one price) within 90 days (active records within 90 days and inactive records within past 24 months).
	Order TWN Mortgage Preferred	Access to obtain one-time instant verification of income (active records within 60 days and inactive records within past 24 months).
	TWN Upgrade	Access to upgrade requests from TWN.
	Access to Order VOE Supplements	Access to request VOE supplements.
	Order TruV	Access to order TruV. Does not apply if not activated on the account level.

ORDER ASSET VERIFICATIONS	Order Asset VerificationsX	Access to order Asset VerificationsX. Does not apply if not activated on the account level.
ORDER SSN VERIFICATIONS	Order Social Security NotificationsX	Access to order Social Security NotificationsX. Does not apply if not activated on the account level.
ORDER FLOOD REPORTS	Order Flood ReportsX	Access to order Flood ReportsX. Does not apply if not activated on the account level.
ORDER LOANSHIELDX	Order LoanShieldX	Access to order LoanShield. Does not apply if not activated on the account level.
	Order LoanShieldX Borrower Review	Access to order LoanShield Borrower Review. Does not apply if not activated on the account level.
	Order LoanShieldX Investor Review	Access to order LoanShield Investor Review. Does not apply if not activated on the account level.
	Order Lexis Nexis Liens & Judgments	Access to order Lexis Nexis Liens & Judgments. Does not apply if not activated on the account level.
ORDER FRAUD REPORTS	Order Fraud ReportsX	Access to order Fraud ReportsX. Does not apply if not activated on the account level.
FANNIE MAE ACCESS	Restrict Fannie Mae New	Disables the ability to access new Fannie Mae submissions.
	Restrict Fannie Mae Reissue	Disables the ability to access Fannie Mae reissues.
POINT OF SALE ACCESS	Point of Sale	Access to Point of Sale for Credit and other products.
	Point of Sale - Credit Xpert	Access to Point of Sale for Credit Xpert.

	Point of Sale - RescoreX	Access to Point of Sale for RescoreX.
	Point of Sale – Xcel ScoreX	Access to Point of Sale for Xcel ScoreX.
ADDITIONAL OPERATOR SETTINGS AND RESTRICTIONS	Marketing Emails	Sends marketing emails regarding new products, company news, etc. This is turned on by default.
	Force Repositories	This section can be left blank.
	Trigger Bundle	Access to bundled product billing. Only applicable if the account is already setup this way.
	New Operator Email	Typically used by administrators. Used to receive an email when a new operator is created.
	Password Reset Email	Typically used by administrators. Used to receive an email when an operator resets their password.
	Force Password Change	Require Operator to change the temporary password issued and create their own password.