

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.

Search operators

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. 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:

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		

4. 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

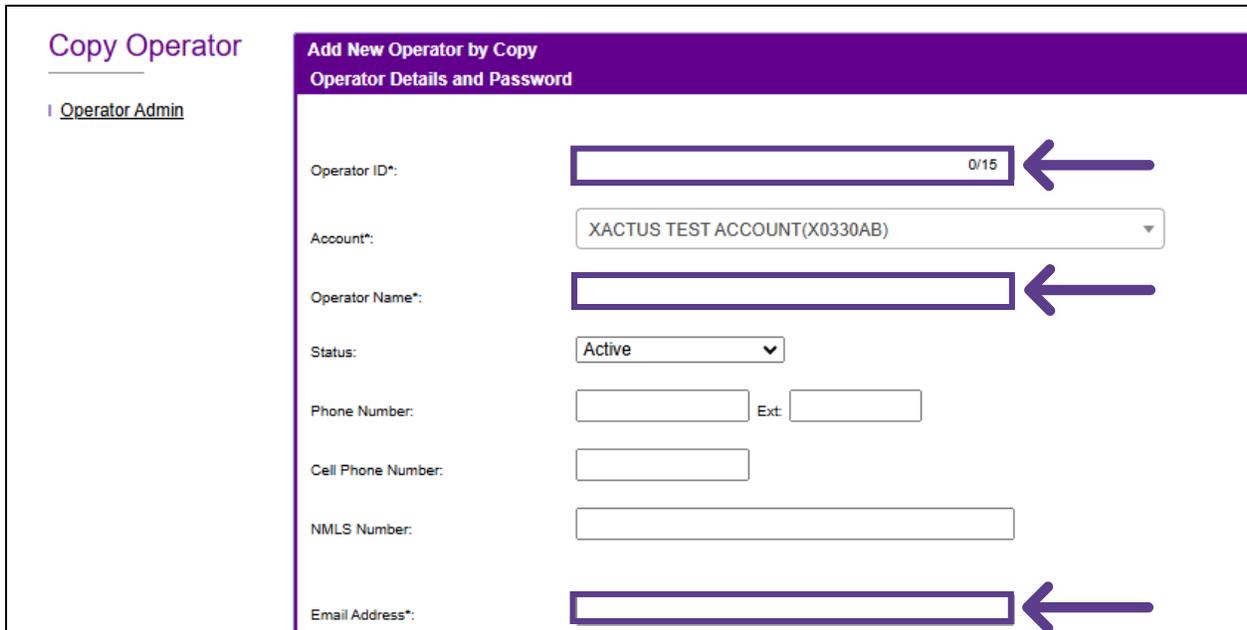
Account: XACTUS TEST ACCOUNT (X0330)

Operator Name:

Status: Active ▼

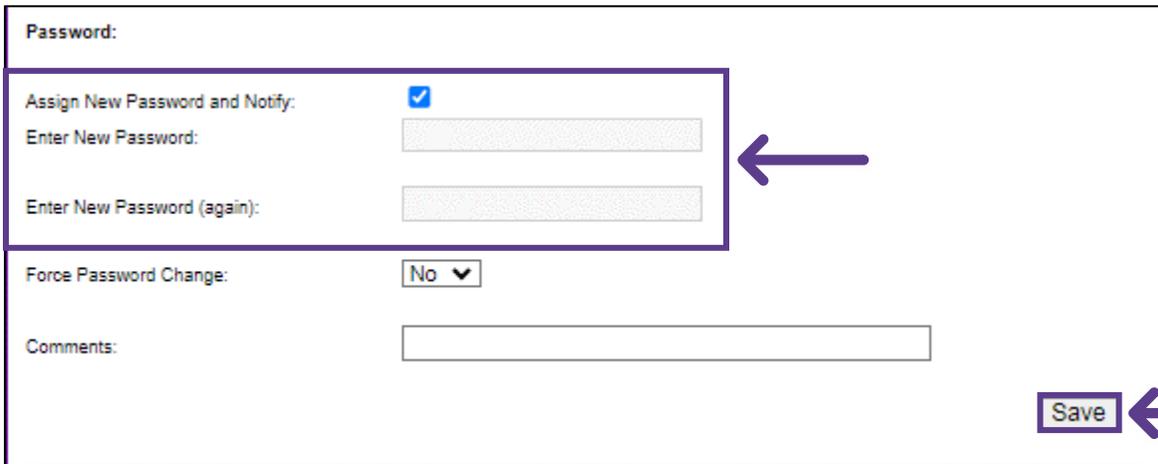
Lock Template Operator: No ▼

5. 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.



The screenshot shows a web form titled "Copy Operator" with a sub-header "Add New Operator by Copy" and "Operator Details and Password". The form contains several fields: "Operator ID*" (text input with "0/15" character count and a left-pointing arrow), "Account*" (dropdown menu showing "XACTUS TEST ACCOUNT(X0330AB)"), "Operator Name*" (text input with a left-pointing arrow), "Status" (dropdown menu showing "Active"), "Phone Number" (text input with "Ext:" label and another text input), "Cell Phone Number" (text input), "NMLS Number" (text input), and "Email Address*" (text input with a left-pointing arrow). A left sidebar contains the text "Operator Admin".

6. 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 the "Password:" section of the form. It includes a checkbox labeled "Assign New Password and Notify:" which is checked. Below it are two text input fields: "Enter New Password:" and "Enter New Password (again):", both with a left-pointing arrow. Below these is a dropdown menu for "Force Password Change:" set to "No". At the bottom is a "Comments:" text input field. A "Save" button is located at the bottom right, with a left-pointing arrow.

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