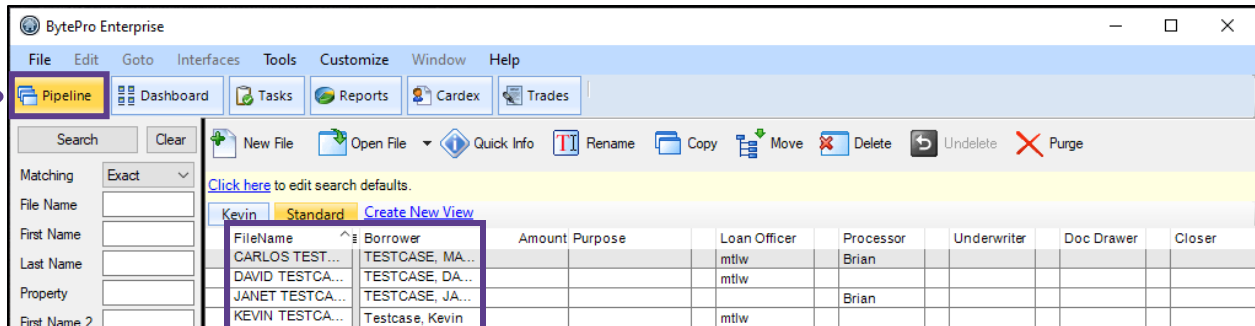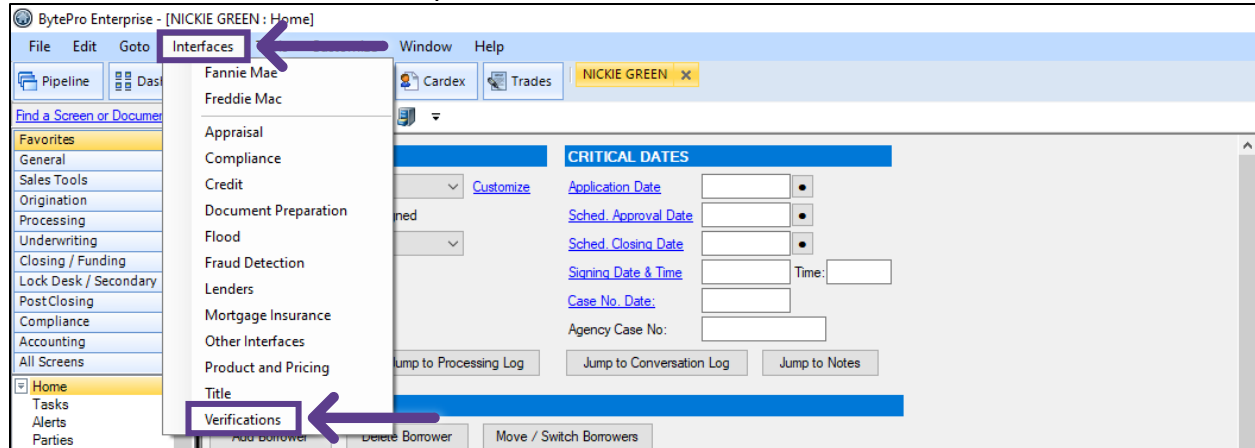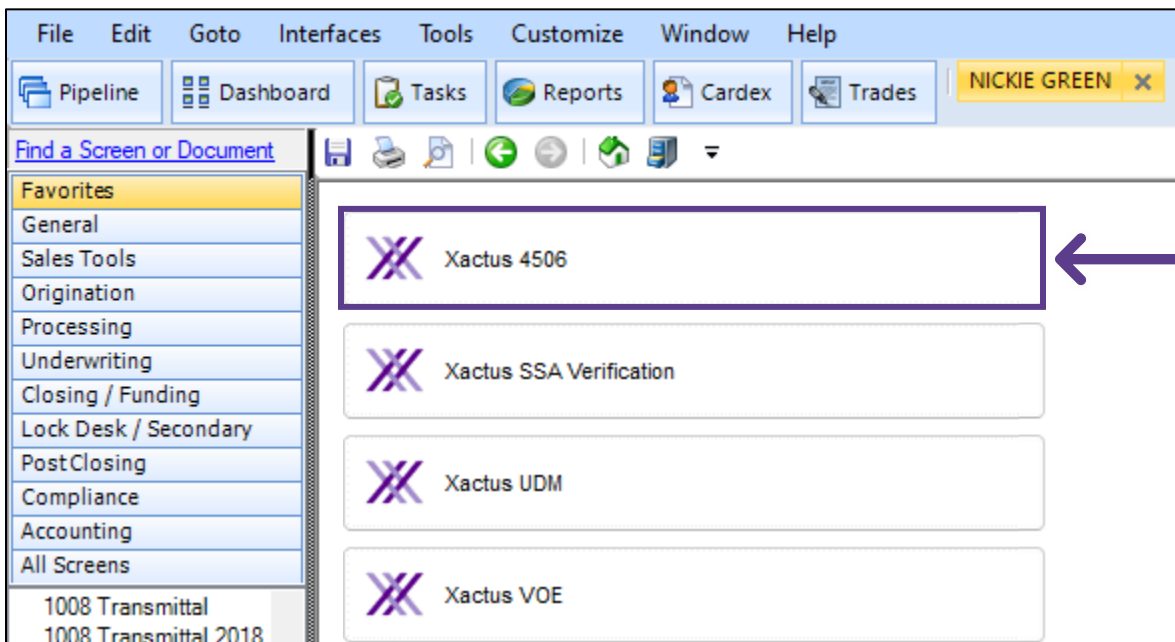**xactusX**
Advancing the Modern Mortgage

1. Start by logging in and opening the borrowers loan file from the Pipeline.
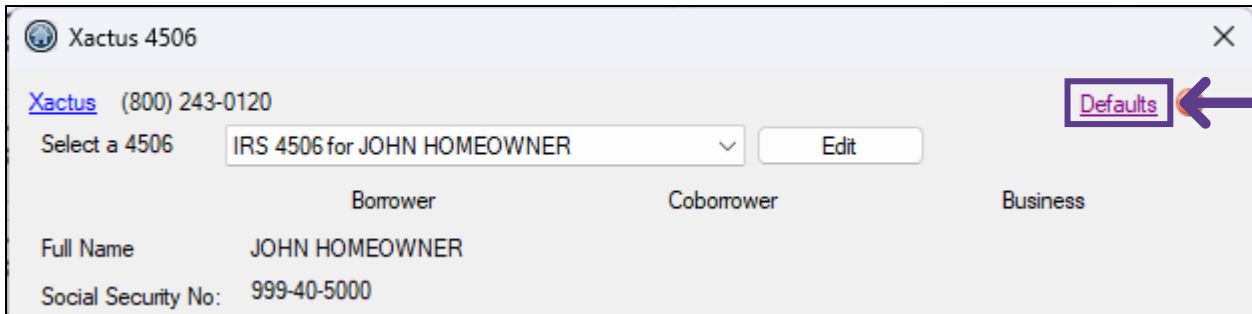

2. Then, click the Interfaces dropdown and select Verifications.

3. A list of providers will appear, double click Xactus 4506 to open the order screen.

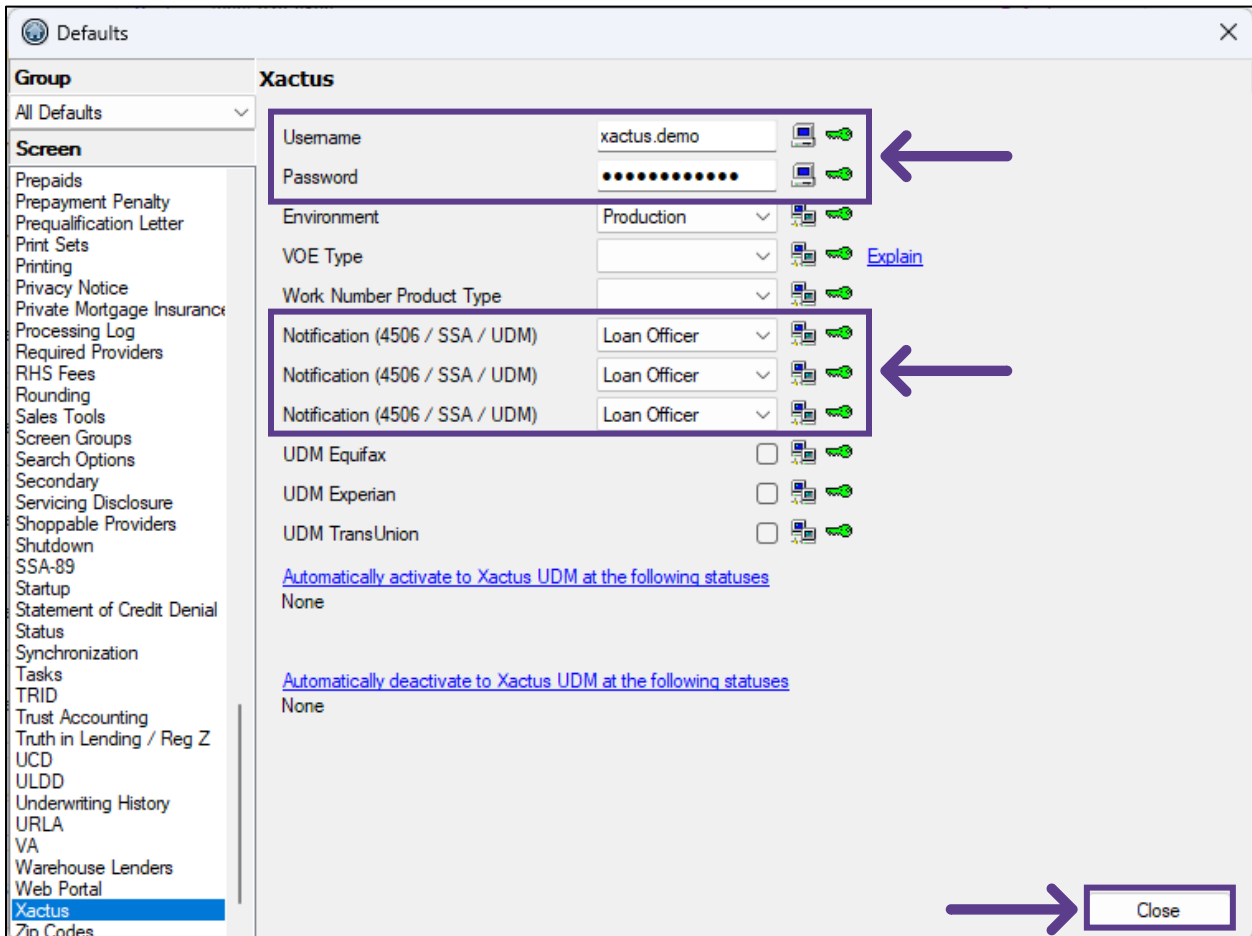4. Enter your user ID and password by clicking Defaults.

5. Once the username, password, and notification party are entered, click Close.

6. Next, select the Form No. and years to request, then attach the 4506C. If the order was e-signed, attached the E-Sign Audit log as well.

7. When complete, click Order.

8. Under Status Message, it will appear as Pending until complete. Once complete, you will receive an email. Return to this screen and click Retrieve to populate the order.

9. The report can be viewed by double clicking the request under Documents.

Xactus 4506 ☒

Xactus (800) 243-0120   Defaults

Select a 4506   IRS 4506 for JOHN HOMEOWNER ⌄   Edit

	Borrower	Coborrower	Business

Full Name   JOHN HOMEOWNER

Social Security No: 999-40-5000

Date of Birth: 01/01/1999

Address   175 13TH STREET WASHINGTON, DC 20013
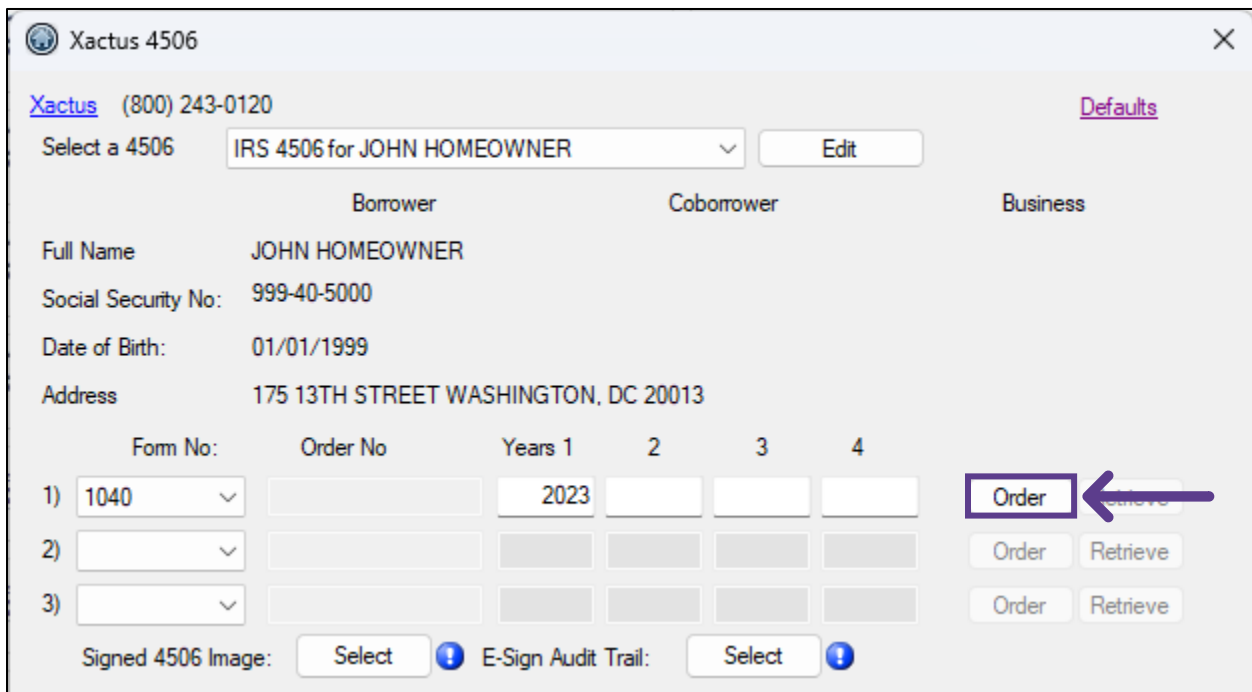
Form No:	Order No	Years 1	2	3	4		
1) 1099 ⌄	62549848	2023				Order	Retrieve
2) ⌄						Order	Retrieve
3) ⌄						Order	Retrieve

Signed 4506 Image: Select ⓘ   E-Sign Audit Trail: Select ⓘ

Status Messages (double-click to view long messages)

Date	Message
8/15/24 2:34:10 PM	Request to status 4506. Response status is: Success. Your order has been completed.
8/15/24 2:27:49 PM	Request to order a 4506. Response status is: Pending. Your Verification request is being proc…

Documents (double-click on a document to view it)

Date	Name
8/15/24 2:34:10 PM	Xactus IRS4506

Close

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

08/15/2024