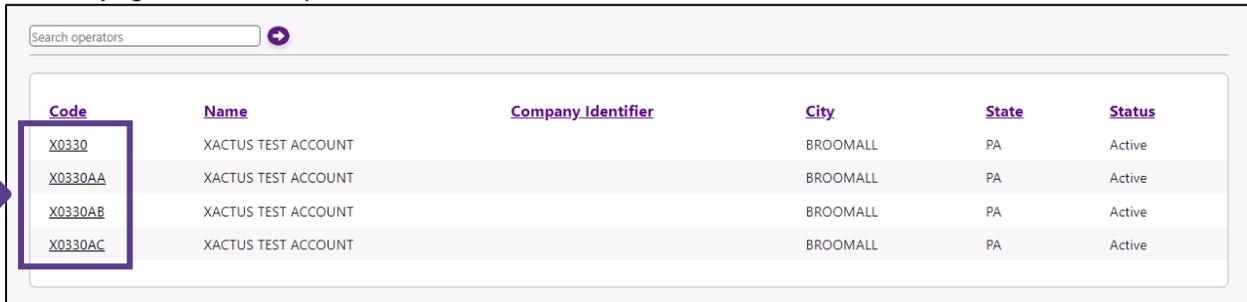


1. Start by logging into Xactus360 and file from the home page, click Administration.



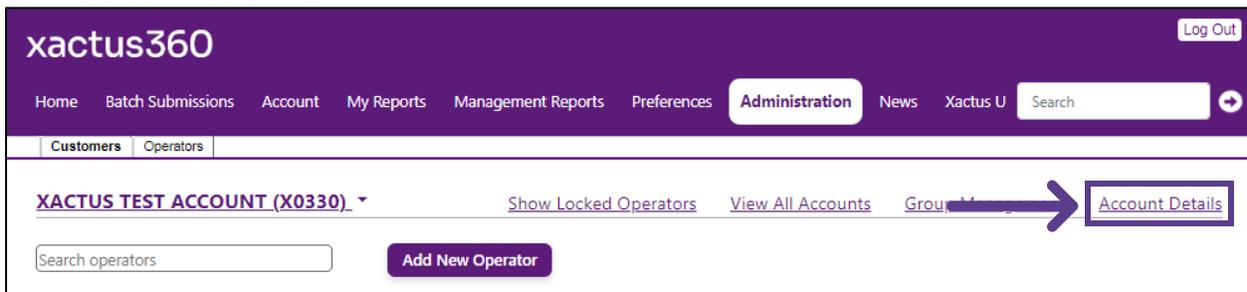
2. If you are setup with additional branches, select the branch to add the group to. If not, you may ignore this step.



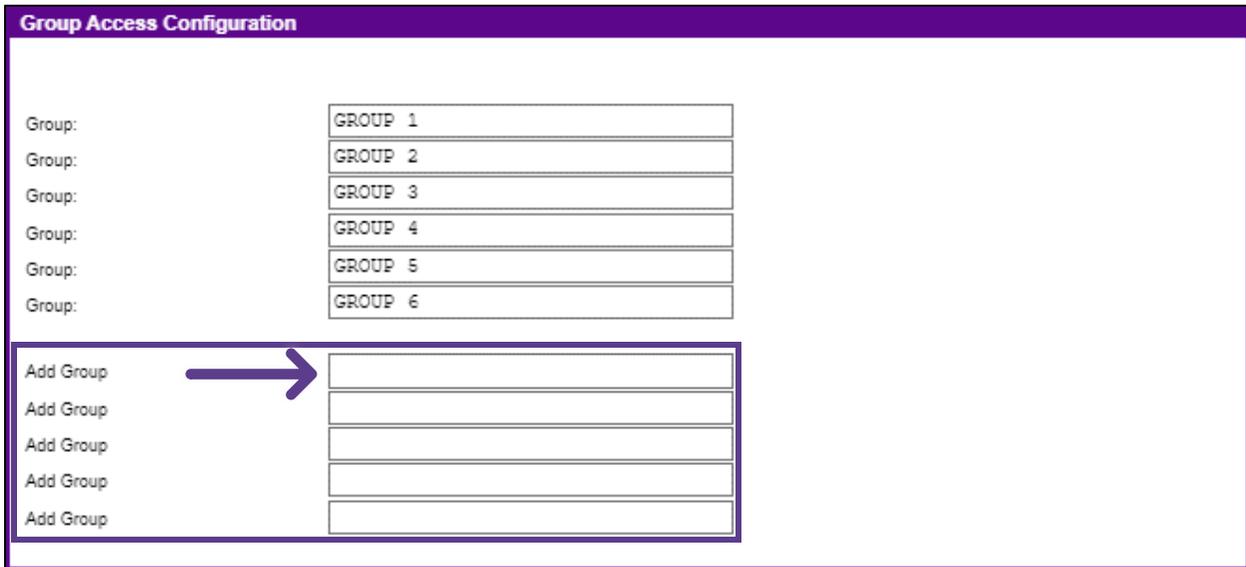
The screenshot shows a table of operators. A blue arrow points to the first row of the table, which is highlighted with a purple border. The table has columns for Code, Name, Company Identifier, City, State, and Status.

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. Click Account Details



- Then, scroll down to Group Access Configuration and enter the group names needed next to Add Group.



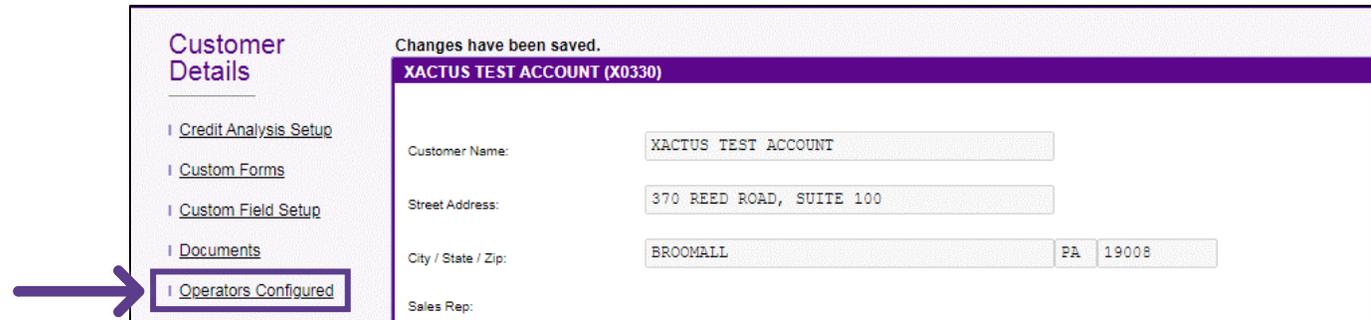
The screenshot shows the 'Group Access Configuration' interface. It features a list of six existing groups, each with a 'Group:' label and a text input field containing the group name: GROUP 1, GROUP 2, GROUP 3, GROUP 4, GROUP 5, and GROUP 6. Below this list is a section with five 'Add Group' labels, each followed by an empty text input field. A purple arrow points to the first 'Add Group' input field.

- Once complete, scroll to the bottom and click Save. If more than five groups are needed, additional spaces will populate upon clicking Save.



The screenshot shows a single 'Save' button. A purple arrow points to the button from the left.

- To add a user to a group, click Operators Configured.



The screenshot shows the 'Customer Details' page. On the left is a sidebar with a list of menu items: Credit Analysis Setup, Custom Forms, Custom Field Setup, Documents, and Operators Configured. The 'Operators Configured' item is highlighted with a purple box and a purple arrow points to it from the left. The main content area shows a message 'Changes have been saved.' followed by a purple header 'XACTUS TEST ACCOUNT (X0330)'. Below this are several form fields: Customer Name (XACTUS TEST ACCOUNT), Street Address (370 REED ROAD, SUITE 100), City / State / Zip (BROOMALL PA 19008), and Sales Rep.

7. Then, click Group Management.

Operator Name	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xtreme Xactus	xactus.demo4	No	Custom	Active	No		10-19-2023, 04:00:17 PM
Xtra Xactus	xactus.demo7	No	Standard	Active	No		10-19-2023, 04:03:20 PM
Xquisite Xactus	xactus.demo3	No	Standard	Active	No		
Xpress Xactus	xactus.demo8	No	Standard	Active	No		10-19-2023, 03:58:51 PM

8. Add an Assigned Group to each Operator that requires Group Access by selecting the Assigned Group drop-down and choosing 1 group (or team). The Assigned Group should be one of the groups shown under Group Access.

Operator Name	Operator ID	Assigned Group	Group Access
Xactus Demo1	xactus-demo1	GROUP 1	
Xactus Demo	xactus.demo	GROUP 1	
Xactusphere Xactus	xactus.demo01	(Select Group)	
Xcellent Xactus	xactus.demo2	(Select Group)	
Xquisite Xactus	xactus.demo3	(Select Group)	
Xtreme Xactus	xactus.demo4	GROUP 1	× GROUP 1 × GROUP 2 × GROUP 3 ×
Xcitement Xactus	xactus.demo5	(Select Group)	
Xciting Xactus	xactus.demo6	(Select Group)	

9. Next to the applicable user, click the group access box and select a group or groups from the list. Once all users have the needed groups assigned, scroll to the bottom and click Save.

XACTUS TEST ACCOUNT (X0330) [Show Locked Operators](#) [Operators Configured](#)

Operator Name	Operator ID	Assigned Group	Group Access
Xactus Demo1	xactus-demo1	GROUP 1	
Xactus Demo	xactus.demo	GROUP 1	
Xactusphere Xactus	xactus.demo01	GROUP 1	
Xcellent Xactus	xactus.demo2	GROUP 1	
Xquisite Xactus	xactus.demo3	GROUP 1	
Xtreme Xactus	xactus.demo4	GROUP 1	
Xcitement Xactus	xactus.demo5	(Select Group)	
Xciting Xactus	xactus.demo6	(Select Group)	
Xtra Xactus	xactus.demo7	(Select Group)	
Xpress Xactus	xactus.demo8	(Select Group)	
Xhilarating Xactus	xactus.demo9	(Select Group)	
Xactus Appraisal FirewallX	xactusafx	(Select Group)	
Xactus Appraisal	xactusappraisal	(Select Group)	

Group Access

XACTUS TEST ACCOUNT (X0330)

- GROUP 1
- GROUP 2
- GROUP 3
- GROUP 4
- GROUP 5

x GROUP 1 x GROUP 2 x GROUP 3 x

Save

Users who are part of a group will only be able to view information belonging to others in the group.

10. Once an operator is added to a Group, additional settings become available to allow view of multiple Groups. Back on the Operators Configured tab, click a user to view their restrictions.

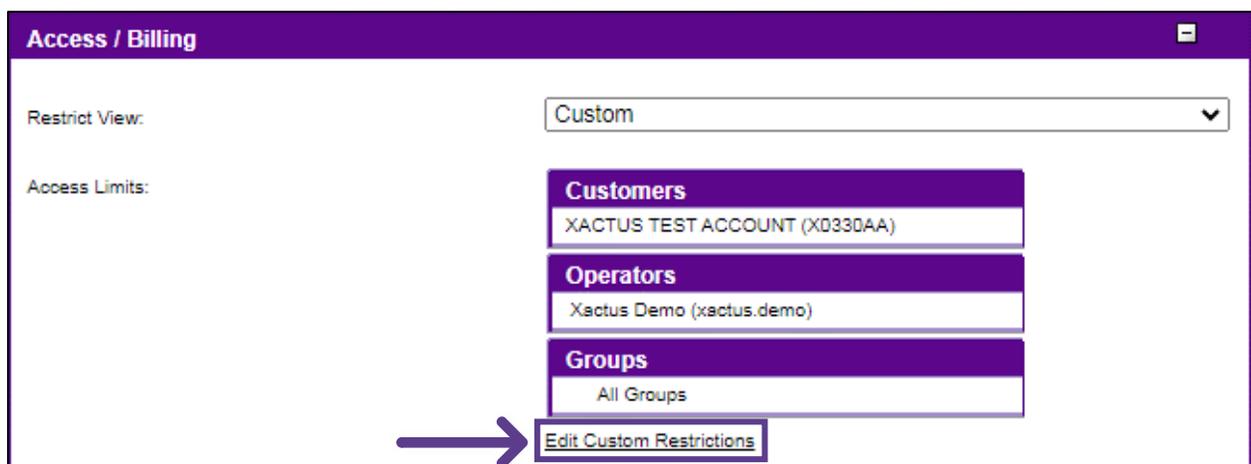


XACTUS TEST ACCOUNT (X0330) ▾ Show Locked Operators View All Accounts Group Management Account Details

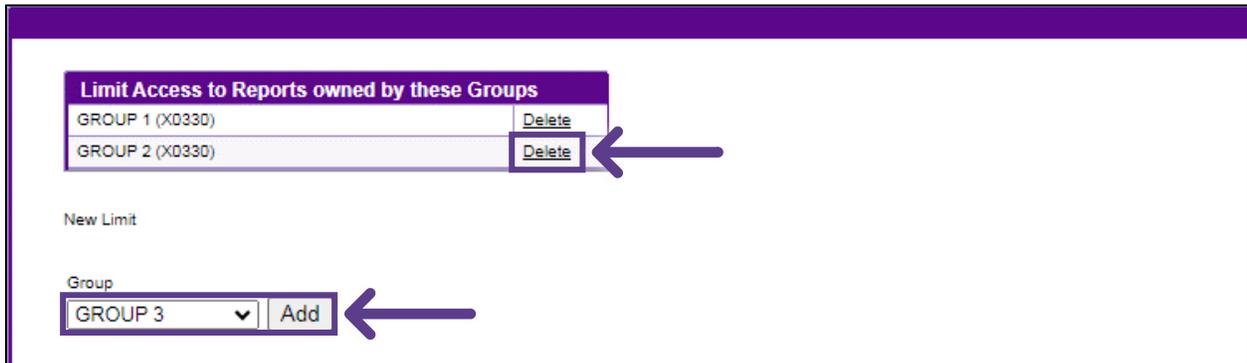
Search operators **Add New Operator**

Operator Name	Operator ID	Admin	Access	Status	SMA	Cost-Center	Last Login
Xtreme Xactus	xactus.demo4	No	Custom	Active	No		10-19-2023, 04:00:17 PM
Xtra Xactus	xactus.demo7	No	Standard	Active	No		10-19-2023, 04:03:20 PM
Xquisite Xactus	xactus.demo3	No	Standard	Active	No		
Xpress Xactus	xactus.demo8	No	Standard	Active	No		10-19-2023, 03:58:51 PM

11. Scroll to and expand the Access Billing tab and click Edit Custom Restrictions



12. Select a Group from the drop-down menu and click Add. There is no limit to the number of Groups that can be added. A Group can be removed from an operator's profile by clicking Delete.



The screenshot displays a web interface for managing report access. At the top, a purple header reads "Limit Access to Reports owned by these Groups". Below this, a table lists two groups: "GROUP 1 (X0330)" and "GROUP 2 (X0330)". Each group has a "Delete" button to its right, with a blue arrow pointing to the "Delete" button for "GROUP 2". Below the table, the text "New Limit" is visible. Underneath, there is a "Group" label above a dropdown menu showing "GROUP 3" and an "Add" button, with a blue arrow pointing to the "Add" button.

13. If a Group is no longer needed, email the Advocacy Team (advocacyteam@xactus.com) for assistance.

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