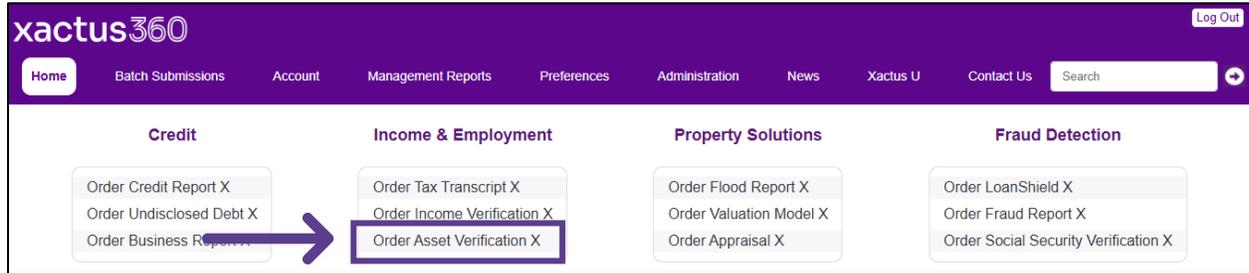


1. Start by logging into Xactus360 and from the home page, click Order Asset VerificationX.



2. First, select AccountChek as your Data Provider. Then, fill in all fields also choosing your Account History and Refresh Period from the drop downs. The authentication to the borrower can be emailed or texted. Once all fields are complete, click Order. This will initiate an email sent to the applicant to complete the authentication process.

The screenshot shows the 'Order Asset Verification X' form with the following fields and values:

- Choose Data Provider:** AccountChek (indicated by a purple arrow)
- Reference Number:** 12345678910 (indicated by a purple arrow)
- Account History:** 30 days (indicated by a purple arrow)
- Refresh Period:** One Time Report (indicated by a purple arrow)
- First Name:** KEVIN (indicated by a purple arrow)
- Last Name:** TESTCASE (indicated by a purple arrow)
- SSN:** 000-00-0008 (indicated by a purple arrow)
- Email:** xactus@xactus.com (indicated by a purple arrow)
- Phone Number:** (800) 258-3488 (indicated by a purple arrow)
- Employer Name:** (empty field)
- ORDER:** (indicated by a purple arrow)

The form also includes a dropdown menu for 'Refresh Period' with options: 30 days, 60 days, 90 days, 183 days, 365 days, and 731 days. Another dropdown menu for 'Refresh Period' has options: One Time Report, 30 Days Refresh, 60 Days Refresh, and 90 Days Refresh.

- Once the order has been placed, you will be taken to the VOA Order Summary screen to check the status of the authentication process.

**VOA ORDER SUMMARY**

Order ID: 6239  
Reference Number: 1234

**Status: In Progress** ←

**BORROWER DETAILS**

NAME	EMAIL	URL	Actions
Test Test	katy.howell@xactus.com	https://mobile2.accountchek.net/?vodkey=f900330e742fed11ae830050f252ca31	🔄

**ORDER HISTORY**

DATE ORDERED	VERIFICATION TYPE	ACCOUNT HISTORY	REFRESH PERIOD
09/08/2022 08:45:12 AM	Automated	30 days	One Time Report

**STATUS HISTORY**

09/08/2022 08:45:00 AM • Invite Email sent

- When the authentication process is complete and the accounts have been verified, an email will be sent with notification. Come back to the VOA Order Summary screen and click **GENERATE REPORT**.

**VOA ORDER SUMMARY**

Order ID: 6239  
Reference Number: 1234

**Status: In Progress**

**GENERATE REPORT** →

**BORROWER DETAILS**

NAME	EMAIL	URL	Actions
Test Test	katy.howell@xactus.com	https://mobile2.accountchek.net/?vodkey=f900330e742fed11ae830050f252ca31	🔄

**ORDER HISTORY**

DATE ORDERED	VERIFICATION TYPE	ACCOUNT HISTORY	REFRESH PERIOD
09/08/2022 08:45:12 AM	Automated	30 days	One Time Report

**STATUS HISTORY**

09/08/2022 08:45:00 AM • Invite Email sent  
09/08/2022 08:46:00 AM • Report Ready

5. Below is a sample of the completed report.

APPLICANT INFORMATION		ORDER DETAILS	
Name	Test Test	Order ID	1900330e-742f-ed11-ae83-0050f252ca31
Email	katy.howell@xactus.com	Loan Number	1234
Phone Number	(862) 525-9666	Days Requested	30 days
Employer	N/A	History Available	518 days
		Account Refresh	One-Time Pull

ASSET REPORT SUMMARY							
AVERAGE & CURRENT BALANCES						TAGS	
	90 Day Average	60 Day Average	30 Day Average	Current Balance	Balance 30 Day Prior	Balance 60 Day Prior	NSF
Dag Site xxxx2369	N/A	N/A	48,412.38	49,025.97	47,502.34	N/A	0
Total Assets				49,025.97			

DIRECT DEPOSITS						
Date	Description	Financial Institution	Account Number	Account Type	Amount	Tags
08/19/2022	FORMFREE HOLDING PAYRL	Dag Site	xxxx2369	Checking	1,800.00	PayrollDeposit DirectDeposit

ALL DEPOSITS						
Date	Description	Financial Institution	Account Number	Account Type	Amount	Tags
08/19/2022	FORMFREE HOLDING PAYRL	Dag Site	xxxx2369	Checking	1,800.00	PayrollDeposit DirectDeposit

OTHER ACCOUNTS			
Financial Institution	Account Number	Account Type	Amount

6. If ordered with a Refresh period, go back to the VOA Order Summary screen. Generate that report by clicking Refresh in the upper right-hand corner. Then select View report to see the refreshed report.

**VOA Order Summary**

Status: In Progress      Report ID: 1319246  
Reference Number: 10016

**BORROWER DETAILS**

NAME	EMAIL	URL	Actions
first last	kgjuliani@cbct.com	https://redirect.accountchek.net/?vodkey=cd86c331b826f0118b3d002248353ebb	

**ORDER HISTORY**

DATE ORDERED	VERIFICATION TYPE	ACCOUNT HISTORY	REFRESH PERIOD
05/01/2025 02:15:02 PM	Automated	30 days	30 Days (29 days remaining)

**REPORT HISTORY**

REPORT DATE	REPORT
5/1/2025 6:22:23 PM	<a href="#">View(Original Report)</a>

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

**Asset VerificationX**      [Order](#)

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