creditxpert®

Quick Start Guide

Getting Started as an Admin on the CreditXpert Platform

Administrator Duties

As an administrator, you get to set up and manage the CreditXpert platform for your company.

New to the CreditXpert platform?

We'll walk you through how to log in, create your profile, customize the platform and invite your team in just a few steps. Get started here!

Your Admin responsibilities include:

- Configuring and maintaining the **settings and preferences** for your company
- Keeping the database of **users** up to date by inviting, archiving or locking users as needed

My Manage Users Screen

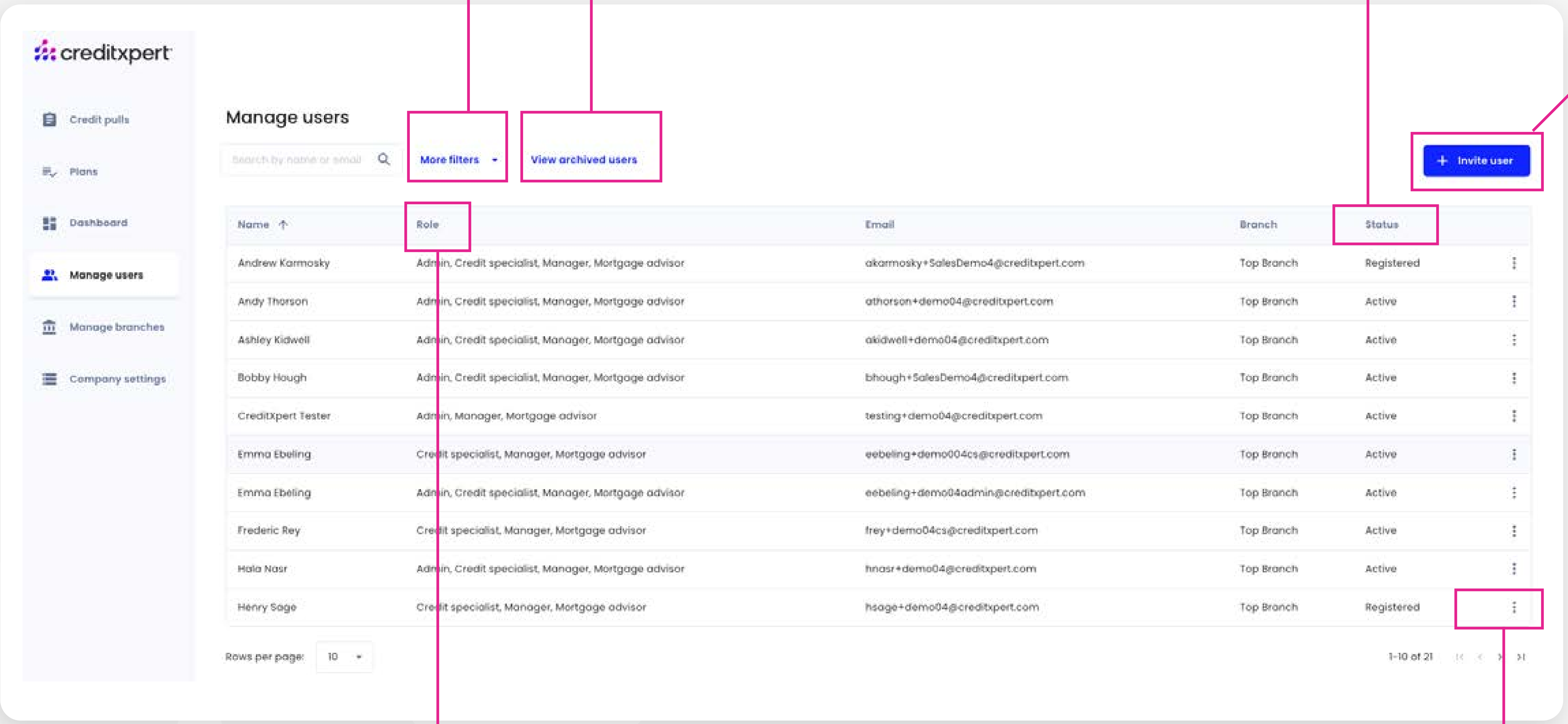
Find all users within your company here. Invite new users, manage existing ones and archive those you wish to remove.

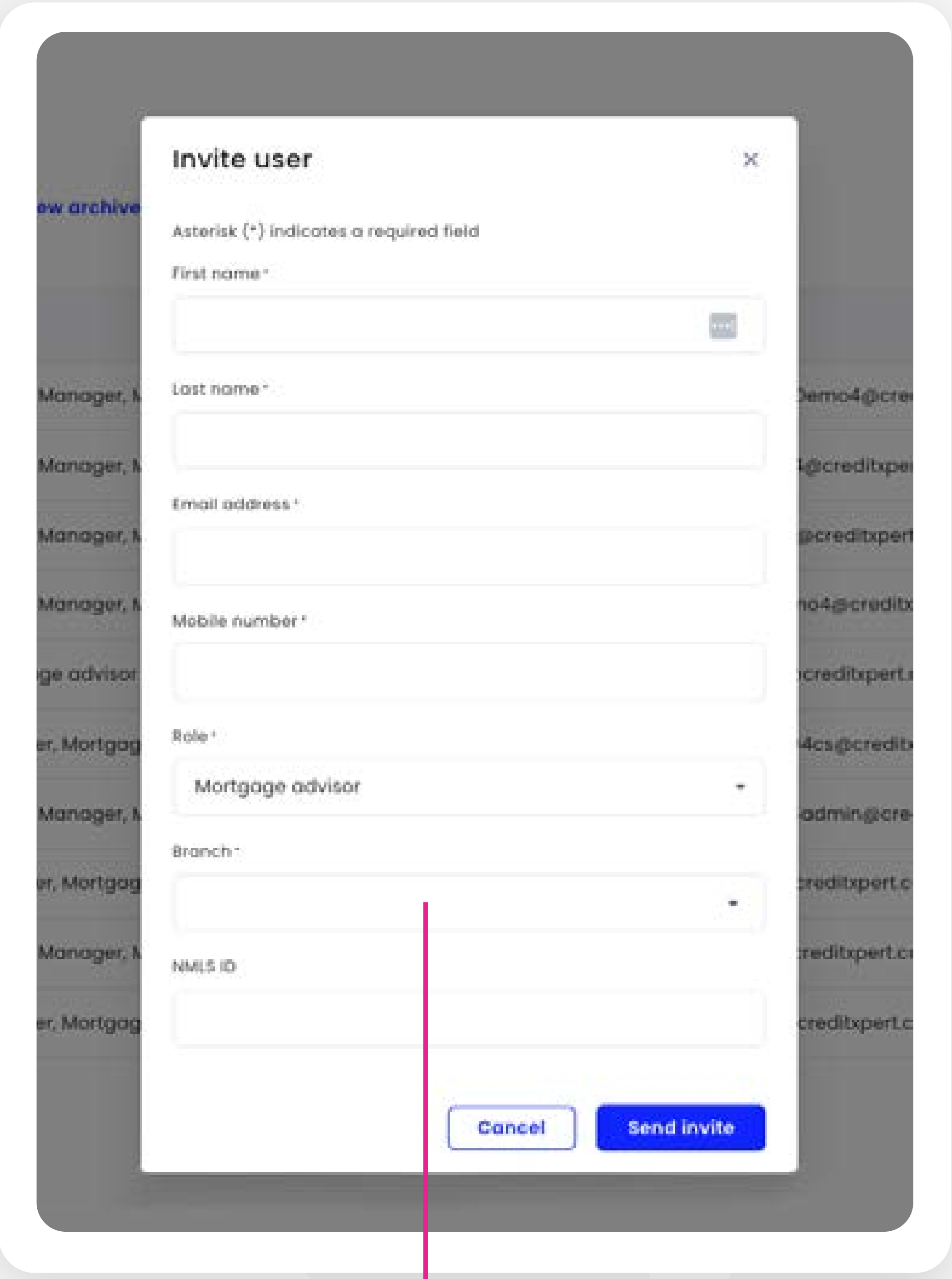
Filters
Filter by Role and Branch.

View Archived Users
Find all users you have archived here.

Status
Find each user status here. Registered users have been invited to the platform but have not logged in yet. Active users have logged in to the platform.

Invite Users
Click here to invite users to the platform one by one.





Roles and Permissions
The roles assigned to each user are listed here. **Admins** manage their company's instance of CreditXpert. **Managers** can view plans and reporting for mortgage advisors under their branch. **Mortgage advisors** can view and manage their own credit pulls and plans. **Credit Specialists** can view and manage all credit pulls and plans for mortgage advisors under their branch.

User Menu
Click on the menu to **edit**, **lock** (remove a user's access to creating plans while keeping current plans available) or **archive** (remove a user from the account with the option of deleting or transferring in-flight plans to another user) users as needed.

Fill out your new user's information, including their role and branch, and send them an invite to log in to the platform.

Note: Inviting users through the Invite User button is only applicable for those using standard authentication. If your company has Single Sign On set up, new users need to be added by the company's internal technical admin.

My Company Settings (Company Info) Screen

Configure your company settings by adding your company info, preferences and disclosures.

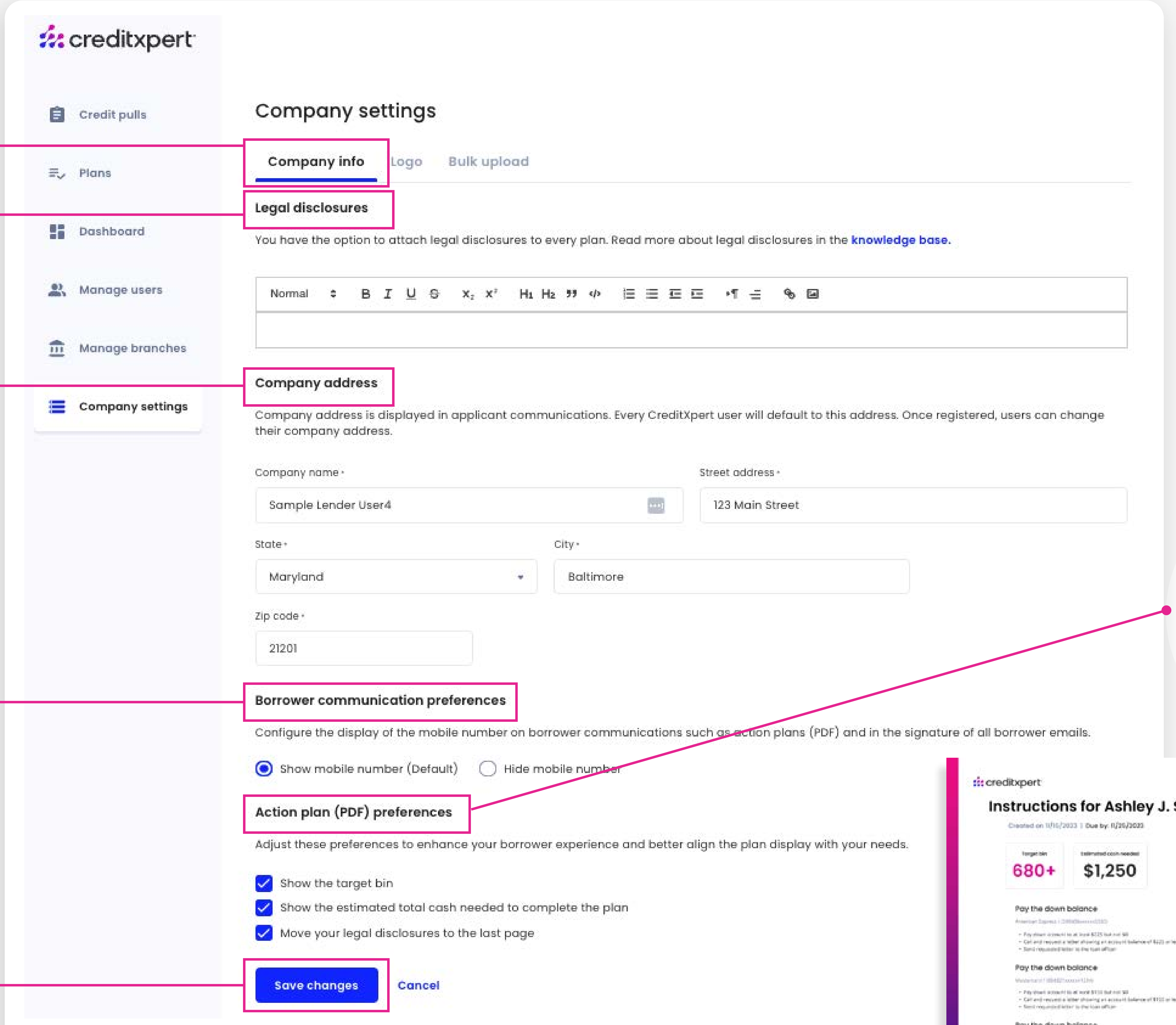
Company Info Tab
Navigate to the Company Info tab within the Company Settings to enter your company info, select preferences and add legal disclosures.

Legal Disclosures
You have the option to add legal disclosures, which will be displayed for every plan.

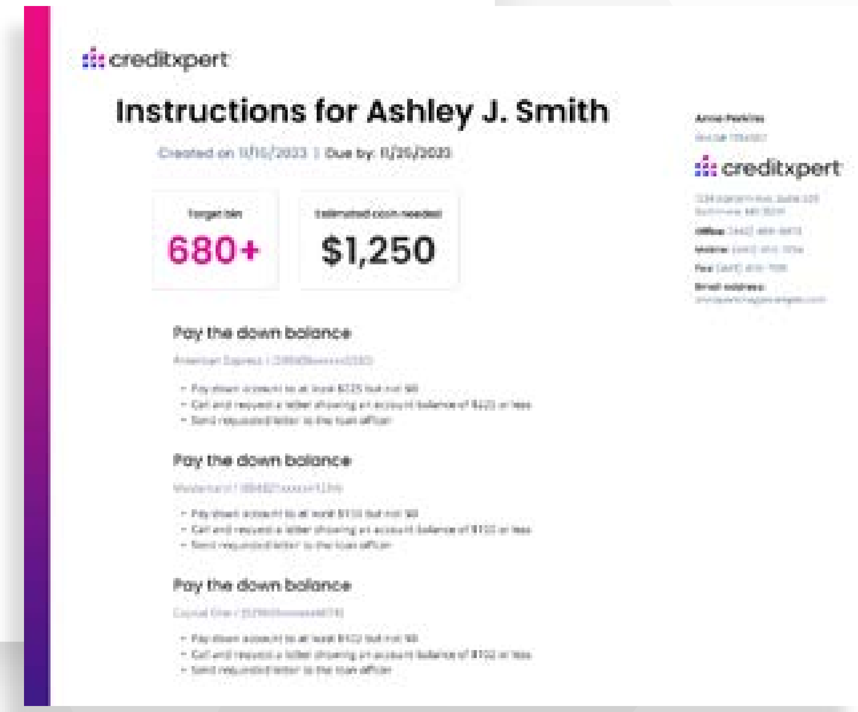
Company Address
Enter your company address, which will be displayed on applicant communications.

Communication Preferences
Select whether or not to display the mobile number on applicant communications.

Save Changes
Click on the button to save all company info selection you just made.



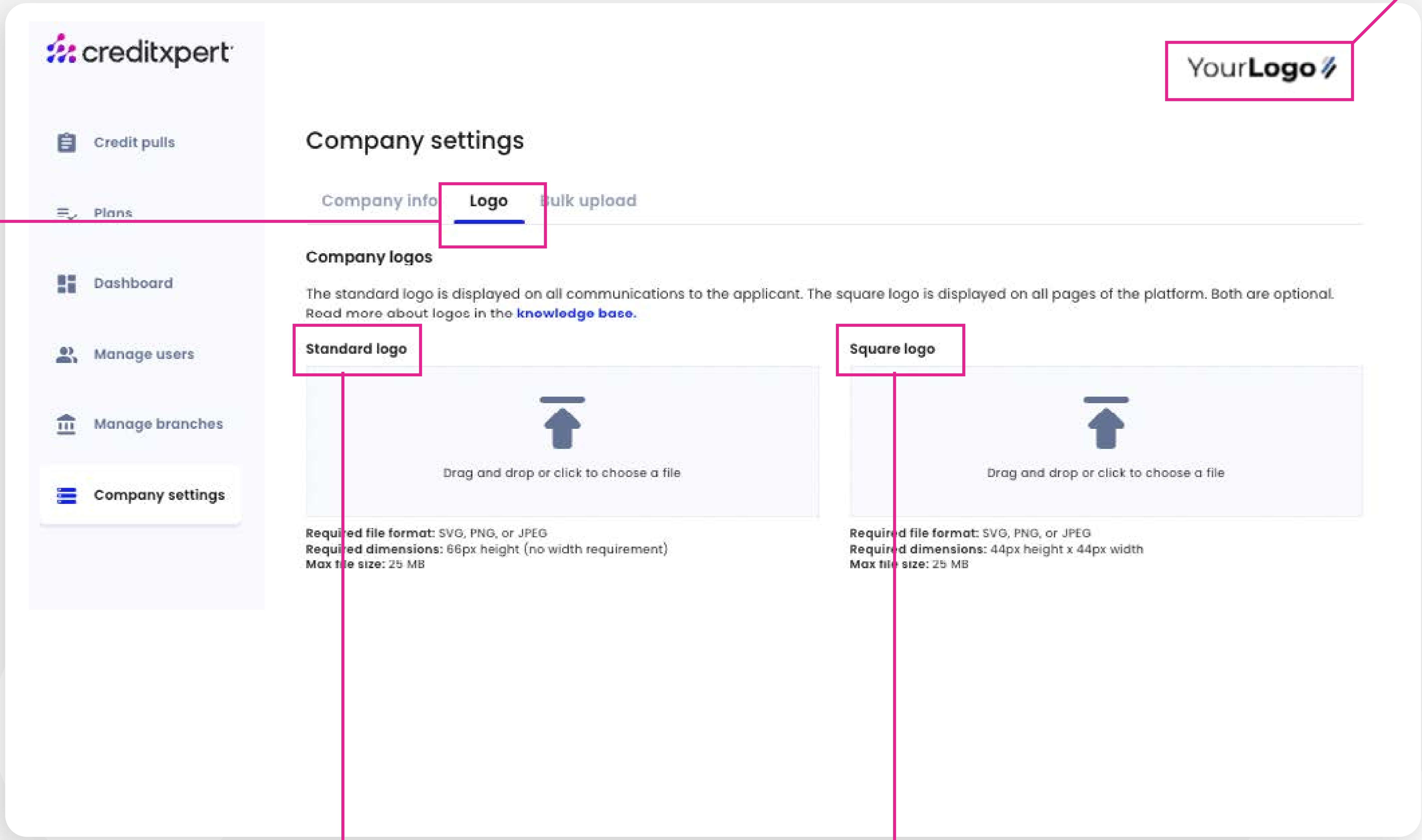
Plan Preferences
Select what elements to display on the action plans that are shared via PDF to all applicants. Here's a snapshot of how those elements will display on the PDF.



My Company Settings (Logo) Screen

Configure your company settings by uploading your company logos here.

Company Logo
You have the option to upload your company logos here. The logos will be displayed on applicant communications and on the platform pages.



Company Logo
Once uploaded, your logo will appear at the top right of all platform pages.
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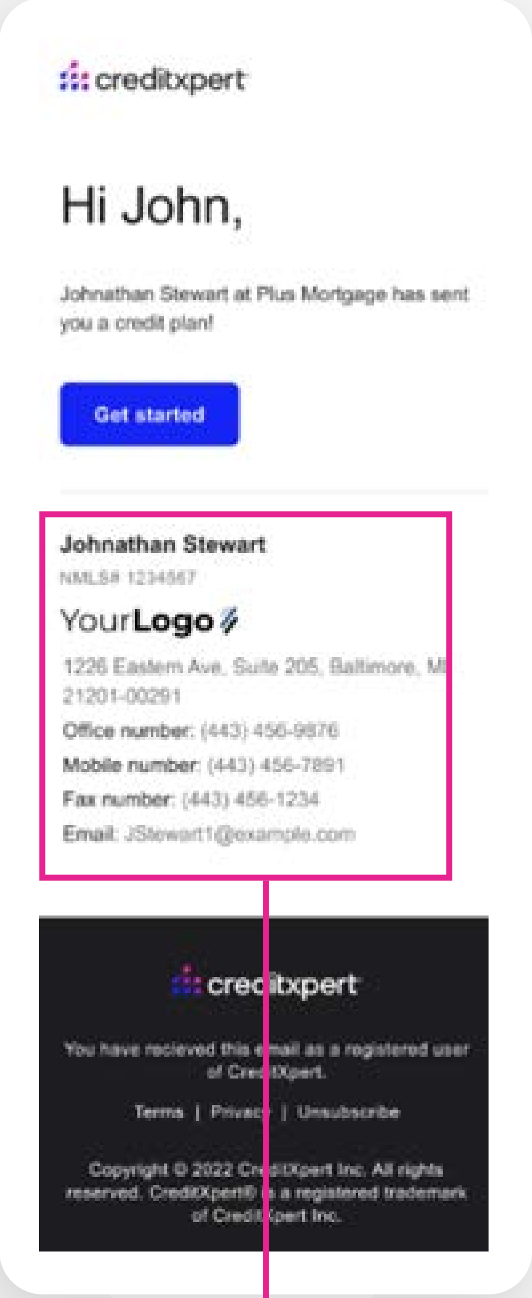
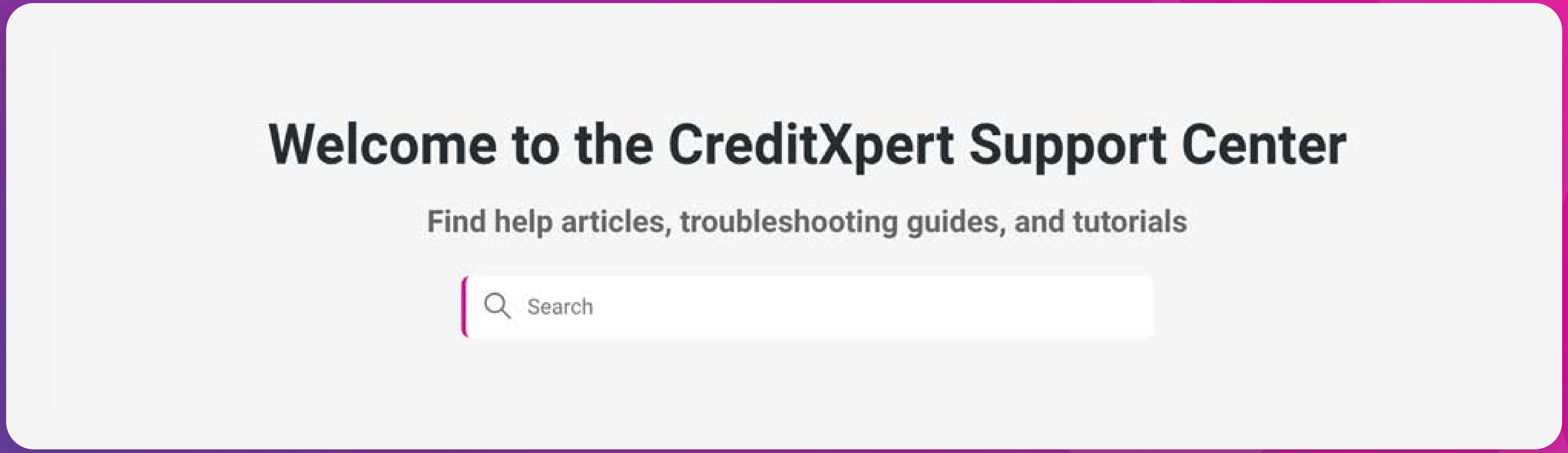


Standard Logo
A standard logo will be displayed on all applicant communications. Please note file requirements before uploading.

Square Logo
A square logo will be displayed on all platform pages. Please note file requirements before uploading.

Applicant Communications
Once uploaded, your logo and contact information will also appear on all applicant communications.



Visit the CreditXpert Support Center for more
in-depth Admin training and educational resources.

Admin Support Center