# Request or Validate Third-Party Transmissions

## Overview

Review how to request or validate Fintech firms for data transmissions and integrations. If entitled, use Integration Xchange to review select Fintech firms with integration options.

[Review Fintech Firms]

[Submit the Transmission Request]

[Frequently Asked Questions]

## Review Fintech Firms

Integration Xchange includes the FinTech Marketplace with select financial technology (Fintech) firms and their integration or data transmission options. Use this platform to review validated firms and documentation required for a transmission. For access, request the "Integration Xchange_OutboundTransmissionsRulesManagement" entitlement.

### To view select Fintech firms:

1. In Wealthscape, select **Menu** > **Resources** > **Fidelity Integration Xchange**.
2. On the top menu, select **FinTech Marketplace**.

> NOTE
> For unlisted Fintech firms, contact transmissioninstalls@fmr.com to identify if the firm is eligible.

### To view data transmission options:

1. In Fidelity Integration Xchange, select **Solutions** > **Outbound Transmissions**.
2. To review information about outbound transmissions including forms and reference material, select **Show More**.

### To view your firm's current integrations:

In Fidelity Integration Xchange, select **My Firm's Integrations** > **Outbound Transmission Rules**.

## Submit the Transmission Request

After you review the vendor and accounts to transmit data for, use the self-service tools to add or delete Outbound Transmission Rules. To request this capability, contact your admin for these entitlements:

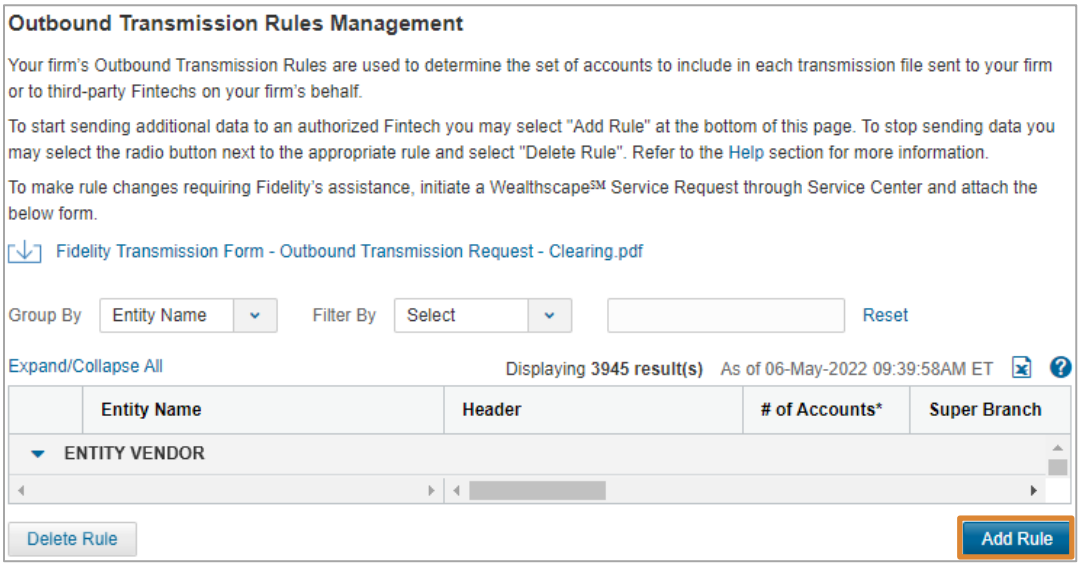
- "Integration Xchange_OutboundTransmissionsRulesManagement"
- "Integration Xchange Admin Outbound Transmission Rules Management" entitlements

### Self-Service

Add or delete specific Outbound Transmission Rules to meet your vendor and account integration needs. To group multiple accounts or isolate a specific account, enter the specific rule(s) for the account(s).

### To add an Outbound Transmission Rule:

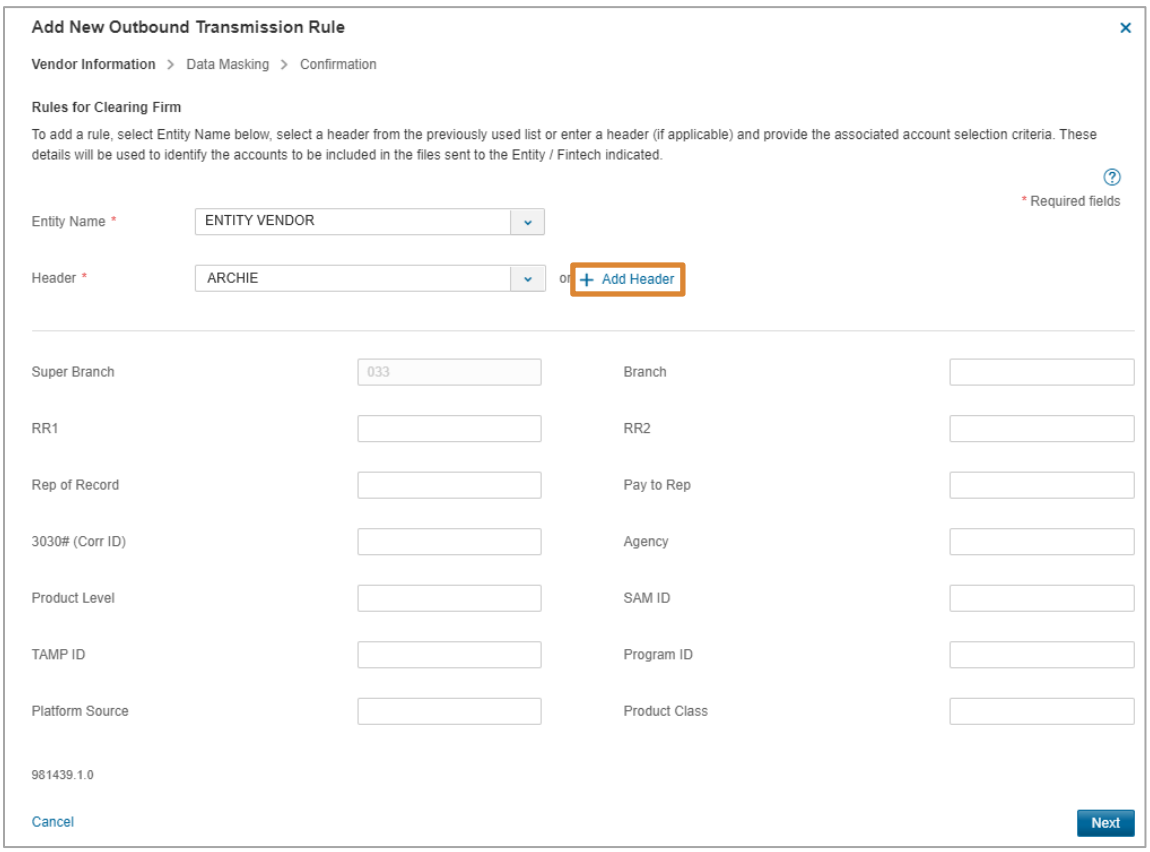
1. In Fidelity Integration Xchange, select **My Firm's Integrations** > **Outbound Transmission Rules**.
2. Select **Add Rule**.



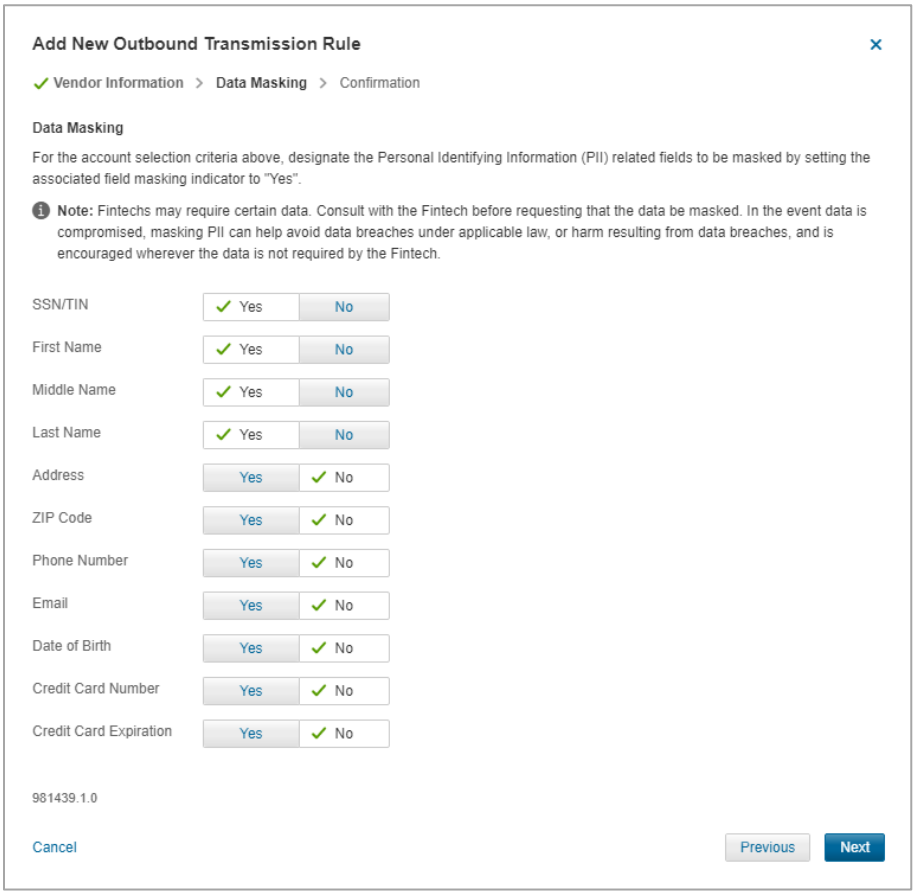

3. Select the Entity Name, then enter the appropriate details.

   If the Entity Name requires a header, enter the details in the textbox.

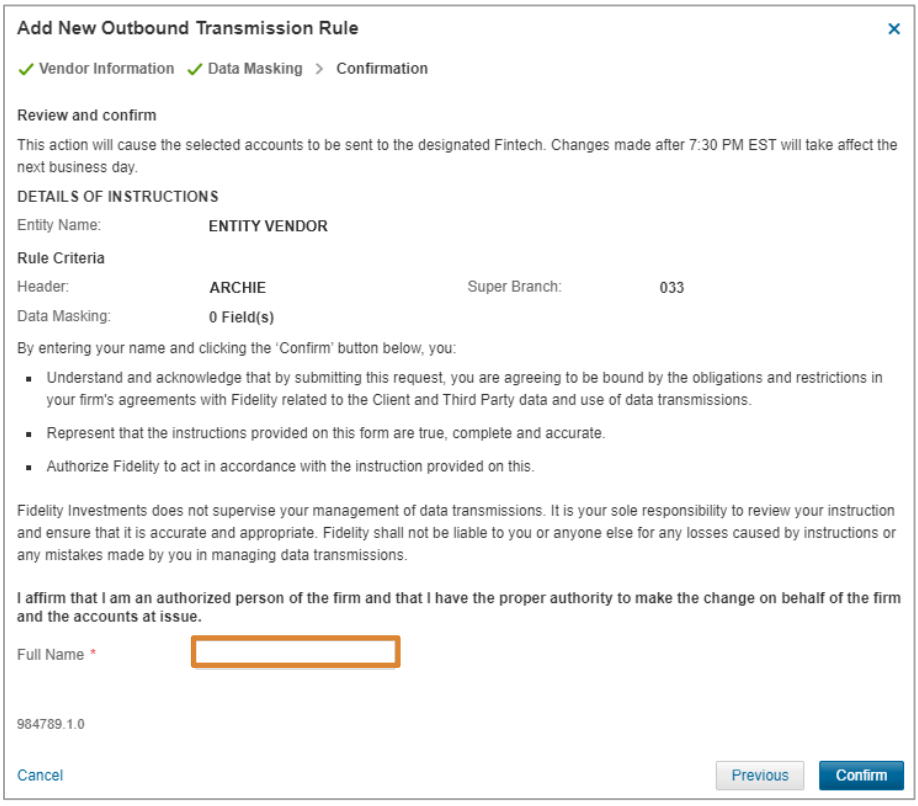
   If rules already exist for this Entity, select the header value from the dropdown or select **+ Add Header** to enter a valid header value.




4. Select **Next** to select data masking criteria, then select **Next**.

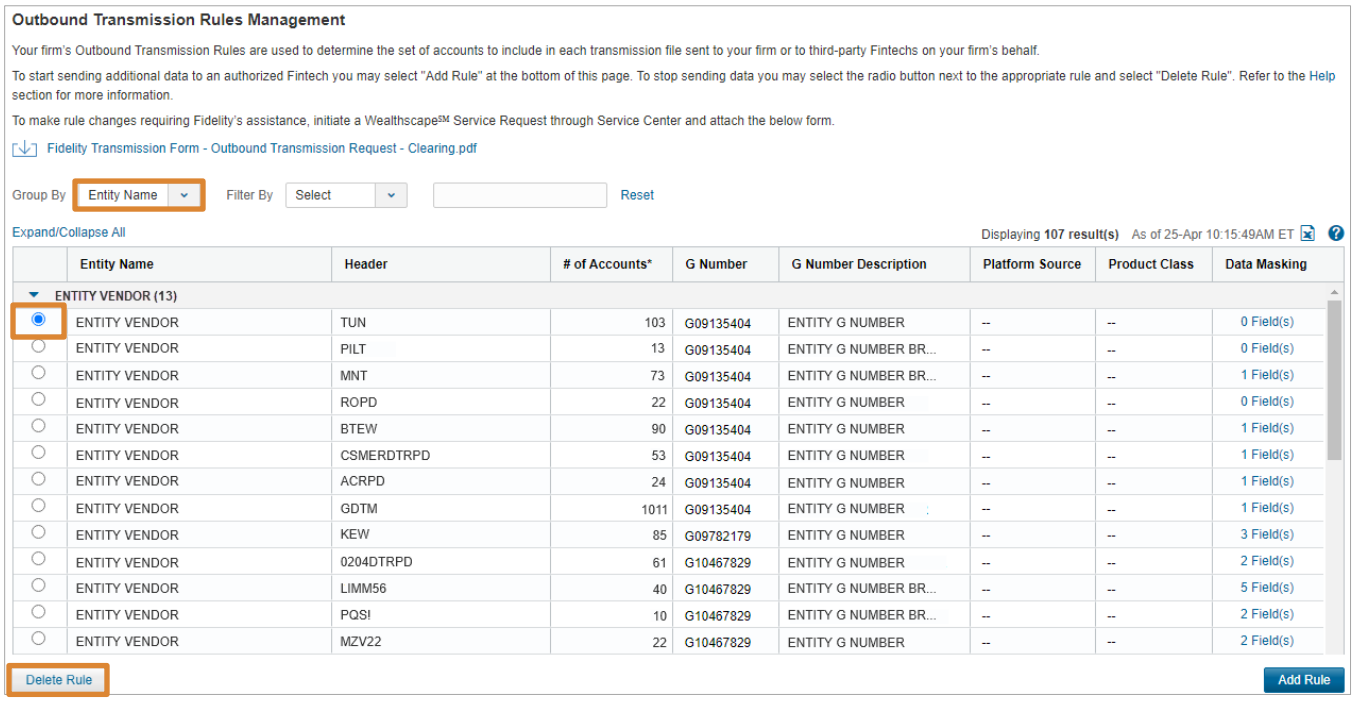



5. Review the transmission rule details, enter your full name, and select **Confirm**.

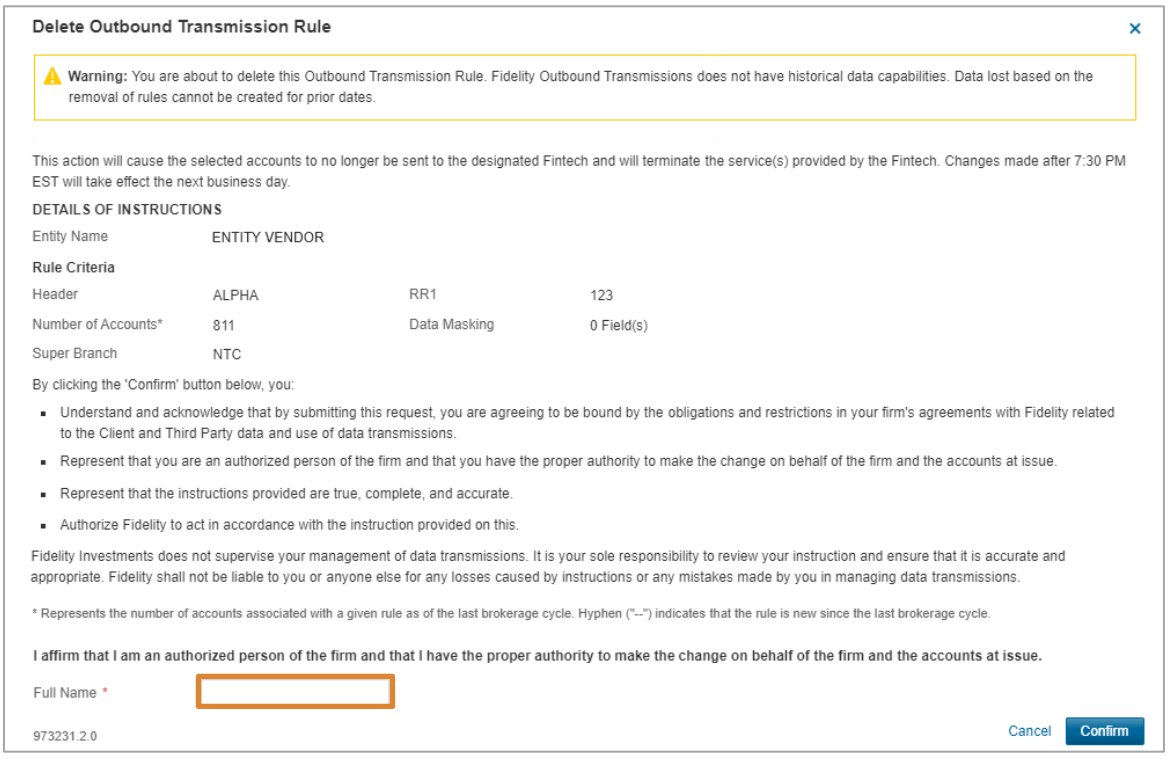


## To delete an Outbound Transmission Rule:

1. In Fidelity Integration Xchange, select **My Firm's Integrations** > **Outbound Transmission Rules**.
2. Expand the Entity Name to review all the available rules or select Expand/Collapse All to review all rules.
   Select the Outbound Transmission Rule to delete, then select **Delete Rule**.




3. Review the confirmation, enter your full name, then select **Confirm**.




The deleted rule no longer appears in the list.

## Frequently Asked Questions

Review the most common questions about the transmission process. For further questions, contact your Client Manager.

| Question | Response |
|---|---|
| How do I request a data feed for my firm or add a file to an existing feed? | Fill out the Standard Transmission Install Request – Clearing form and submit it via Service Request. |
| Who do I contact to general deployment or support questions? | Send an email to transmissioninstalls@fmr.com. |
| Who do I contact for transmission failures or re-transmission requests? | Send an email to NFTRANS@fmr.com. |

For investment professional use only. Not authorized for distribution to the public as sales material in any form.
Screen shots are for illustrative purposes only.
References to specific securities should not be construed as a recommendation or investment advice.
Third-party marks are the property of their respective owners. All other marks are the property of FMR LLC.
Fidelity Institutional® (FI) provides investment products through Fidelity Distributors Company LLC; clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC; institutional advisory services provided by Fidelity Institutional Wealth Advisor LLC.
985926.2.0