Overview

Review how to request or validate third-party firms for data transmissions. If entitled, use Integration Xchange to review select third-party firms with integration options.

Review Third-Party Firms

Submit the Transmission Request

Frequently Asked Questions

Review Third-Party Firms

Integration Xchange includes the FinTech Marketplace with select third-party 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 your firm's current integrations:

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

To view select third-party firms:

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

NOTE

For unlisted 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.

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:

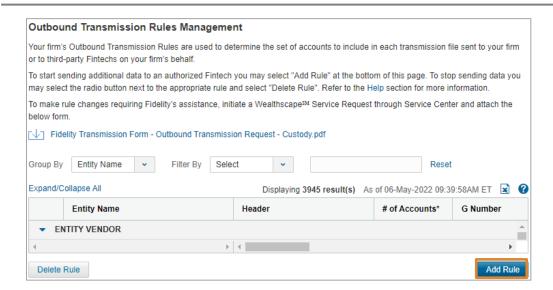
- "Integration Xchange_OutboundTransmissionsRulesManagement"
- "Integration Xchange Admin Outbound Transmission Rules Management" entitlements

Self-Service

Add or delete specific Outbound Transmission Rules to meet your vendor and account integration needs.

To add an Outbound Transmission Rule:

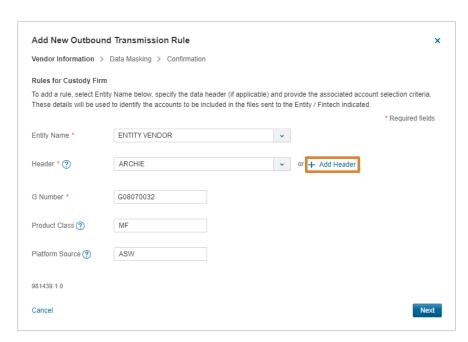
- 1. In Fidelity Integration Xchange, select My Firm's Integrations > Outbound Transmission Rules.
- 2. Select Add Rule.



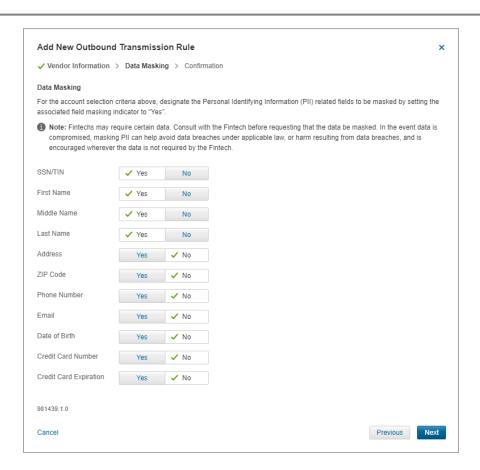
3. Select the Entity Name, then enter the appropriate details.

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

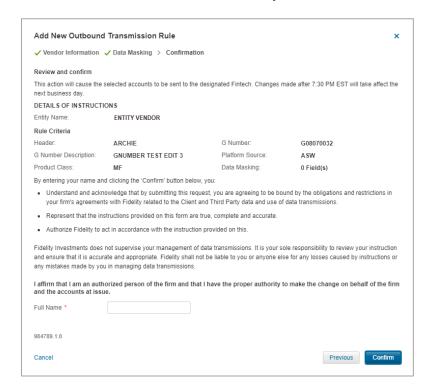
If rules already exist for this Entity, select the header value from the dropdown or select + Add Header to enter a valid header value.



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



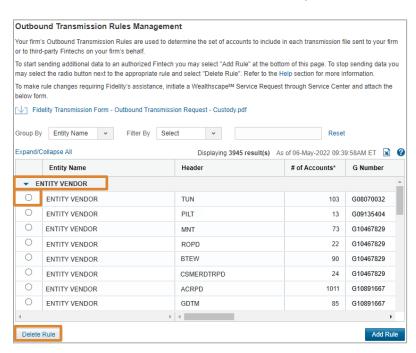
5. Review the transmission rule details, enter your full name, and select Confirm.



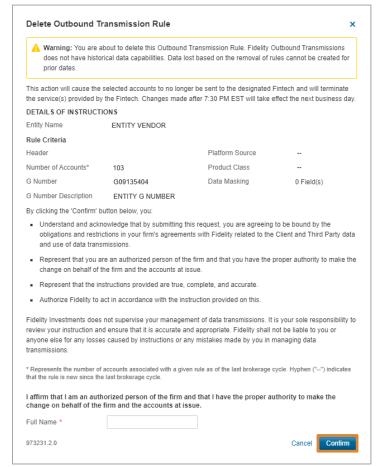
To delete an Outbound Transmission Rule:

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.



Service Request

If you require assistance to make rule changes, submit a Service Request. Select the vendor and accounts to transmit data for and complete the Outbound Transmission Request Form to submit via Service Request.

NOTE

For transmission request edits, repeat these steps and attach the Outbound Transmission Request Form with the changes.

To submit a transmission request:

- 1. In Wealthscape, select Menu > Service > Initiate Service Request.
- 2. Enter your firm's Proprietary account number.
 - To locate this number, contact your Client Manager.
- 3. On Service Request Menu, select Product Support > Platform Integration > Third Party Transmission Request.
- 4. Complete the required information for the request:
 - Select Add, Delete, or Inquiry (about a third party).
 - Enter appropriate details in Additional Details.
- 5. Select Add Attachment and upload the Outbound Transmission Request Form.

Frequently Asked Questions

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

Question	Response
Who do I contact to submit the form or ask general deployment or support questions?	Send an email to transmissioninstalls@fmr.com.
How do I edit a submitted Third-Party Transmission request?	On the Outbound Transmission Request form, use Section 3 to make edits and submit a Service Request with the form attached.

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