Getting Started with Technology Manager

Servicing Transfer Approval and

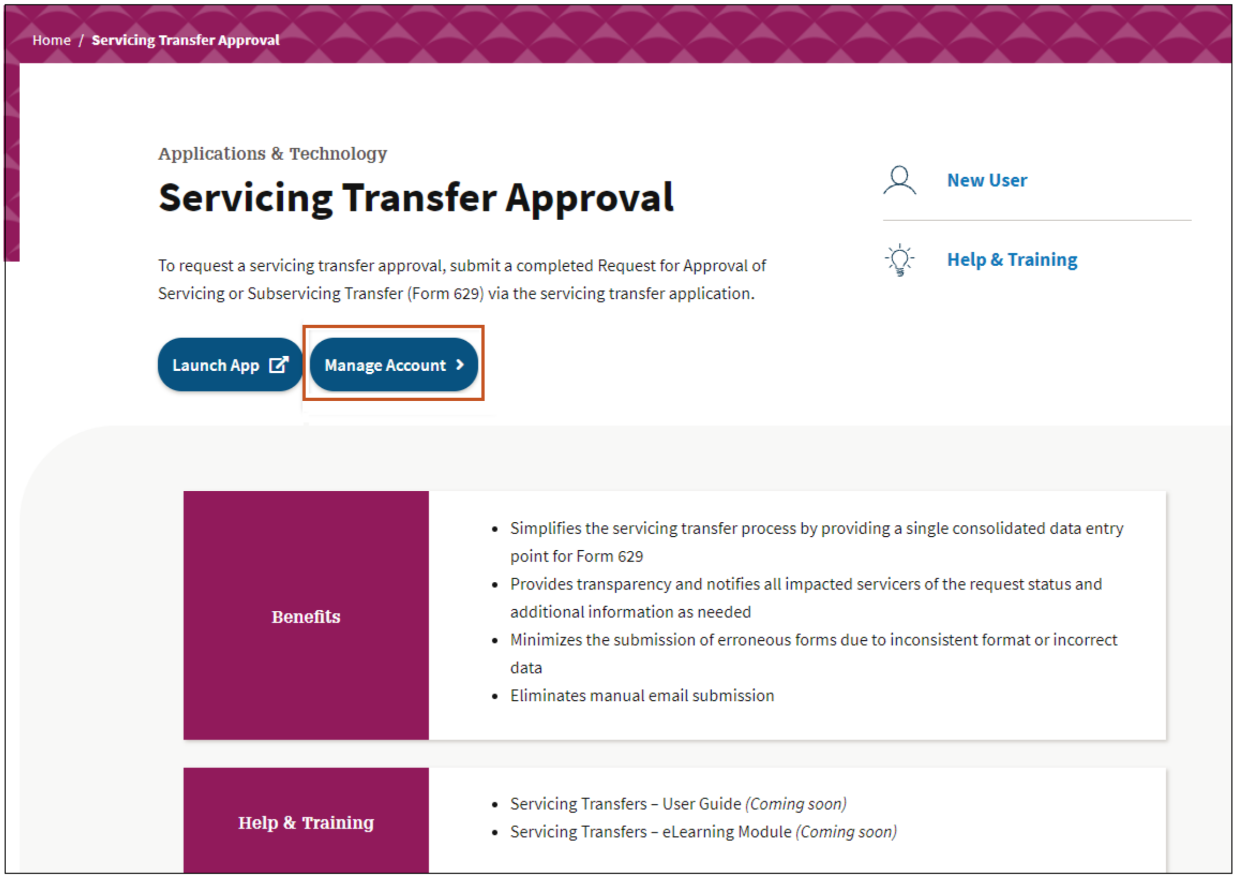
Quick Exchange Application

March, 2022

Contents

Manage Account

User's access can be managed by a Servicer's Corporate Administrator accessing Technology Manager and the Manage Account option from the Servicing Transfers Approval page. This allows a Fannie Mae Registered Admin to manage applications and users access to the Fannie Mae technology application, **Quick Exchange**, related to the Servicing Transfer process.



Managing Applications in Technology Manager

As a Corporate Administrator, you are authorized to manage applications for your organization. This includes setting up applications, requesting access to applications, granting user groups access to applications, and deactivating applications.

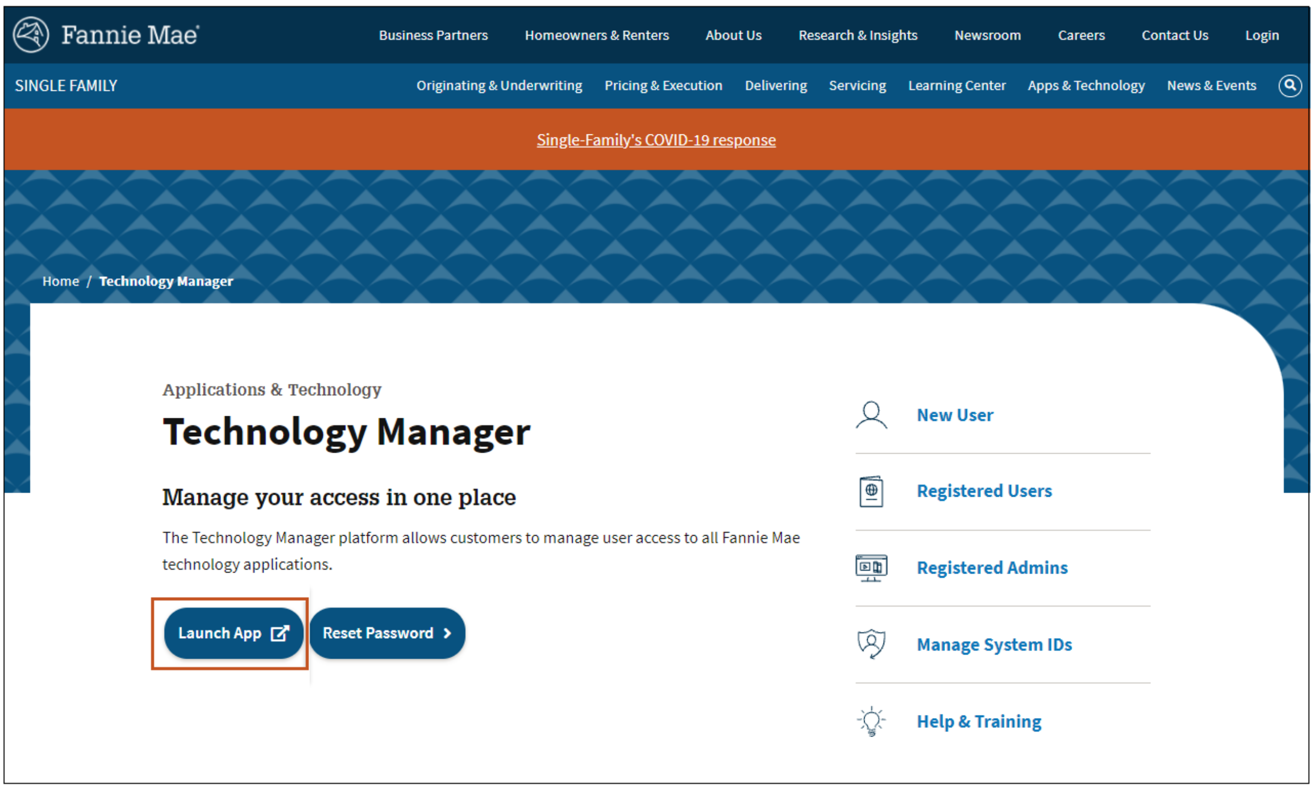
Launch Technology Manager

The Technology Manager platform allows customers to manage user access to all Fannie Mae technology applications.

Launch App

To access Technology Manager platform, follow the steps below:

1. Click Launch App.

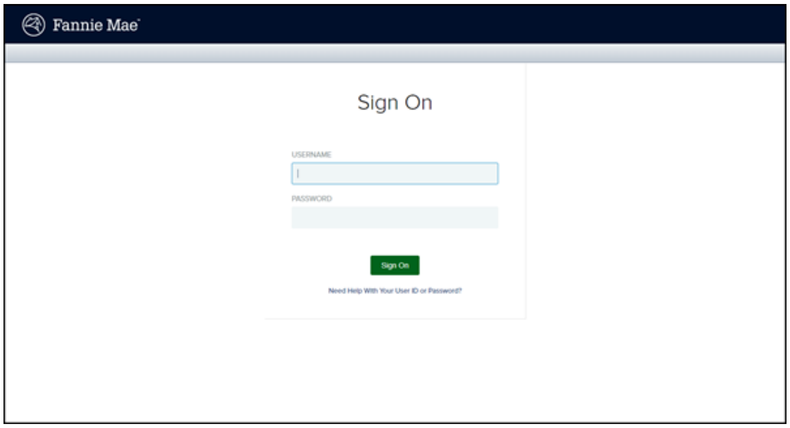


> **Note:** *Alternatively, you can go to the Technology Manager page on the Fannie Mae Single Family Business Website and click the Launch App button.*

Log In

To log into Technology Manager, follow the steps below:

1. Enter **USERNAME** and **PASSWORD.**
2. Click **Sign On**.



> **Note:** *For assistance with your User ID or Password, click the* ***Need help with your user ID or password*** *link below the Sign On button.*

Log Out

To log out of Technology Manager, follow the step below:

1. Click **Logout** at the top right corner of any page.

Setting Up an Available Application

There are certain applications which appear in the Available Applications list of the Manage Applications screen that you can set up for an organization. These applications need to be set up for user groups and data folders before they can be further associated to users within an organization. An available application may require agreement to Terms and Conditions.

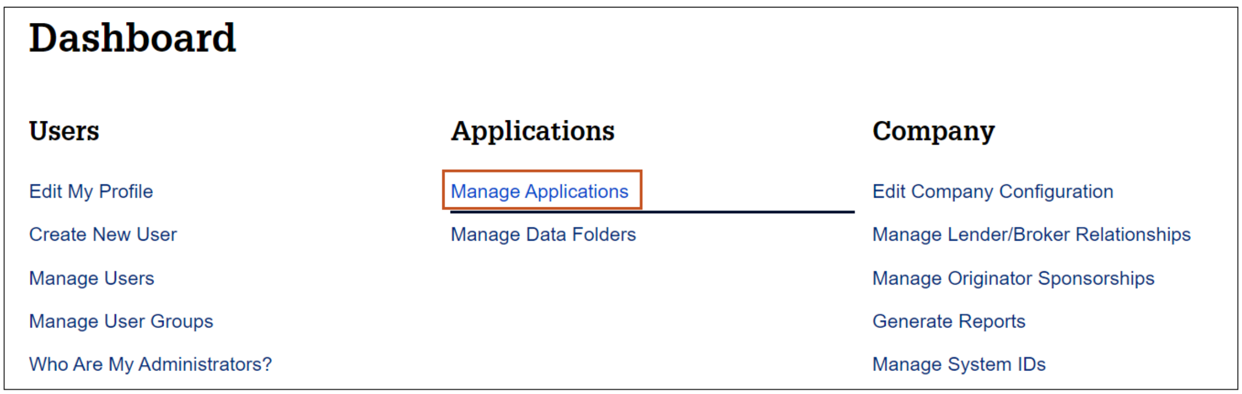
When you first set up an application, a default User Group Name and User Group ID will be granted to the application under the main 5-digit organization. In addition, the application needs to be set up for user groups and data folders before it can be further associated to users within an organization.

> **Note:** *Although the procedure is similar for each application, the screen names, section names and link names may vary, depending on the Application Business Rules.*

To set up an application that appears in the Available Applications list, follow the steps below:

1. Click the **Manage Applications** link.

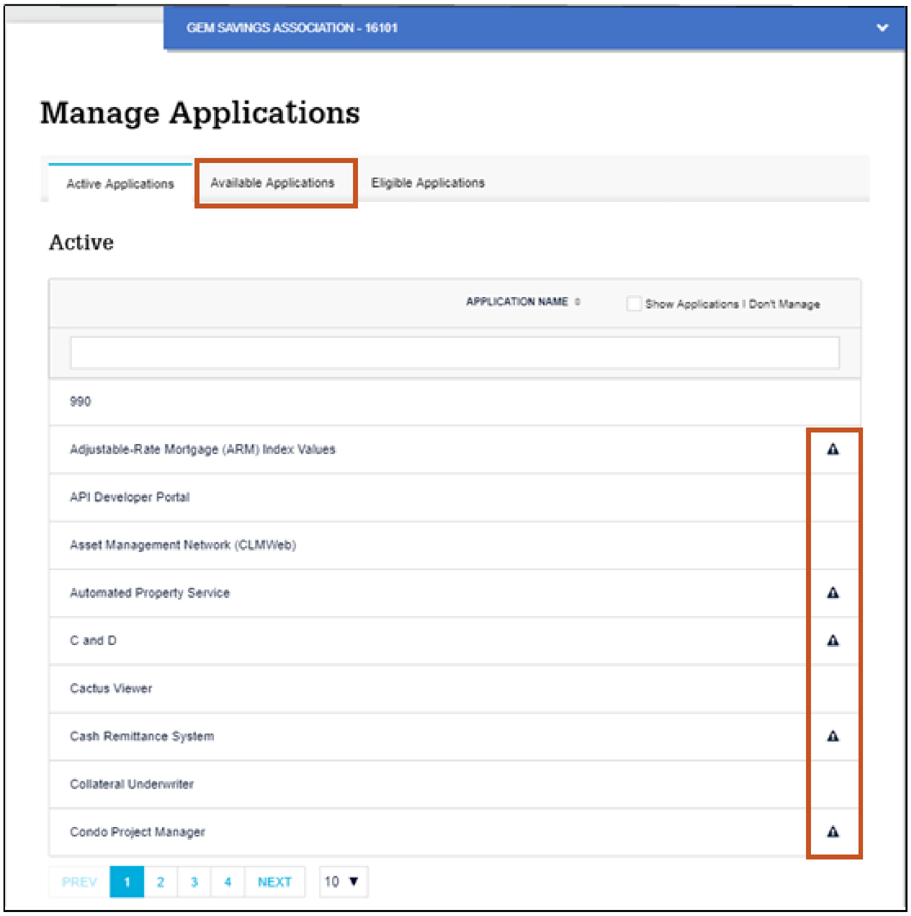
> **Note:** *The Manage Applications screen appears with a list of active applications.*



2. Confirm that the desired application does not already appear in the list.

> **Note:** *If the application does appear, this procedure does not need to be performed.*

3. Click **Available Applications**.

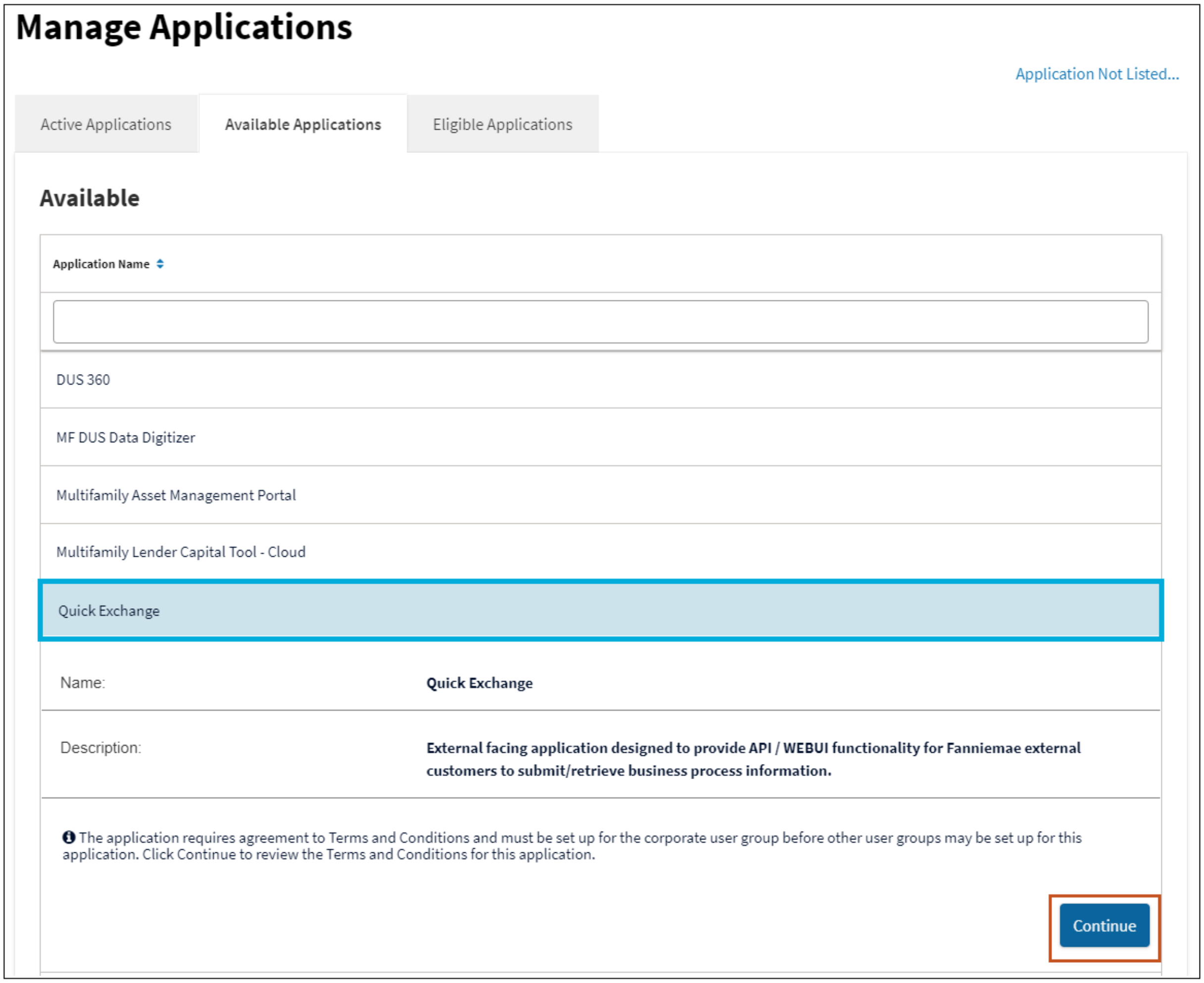


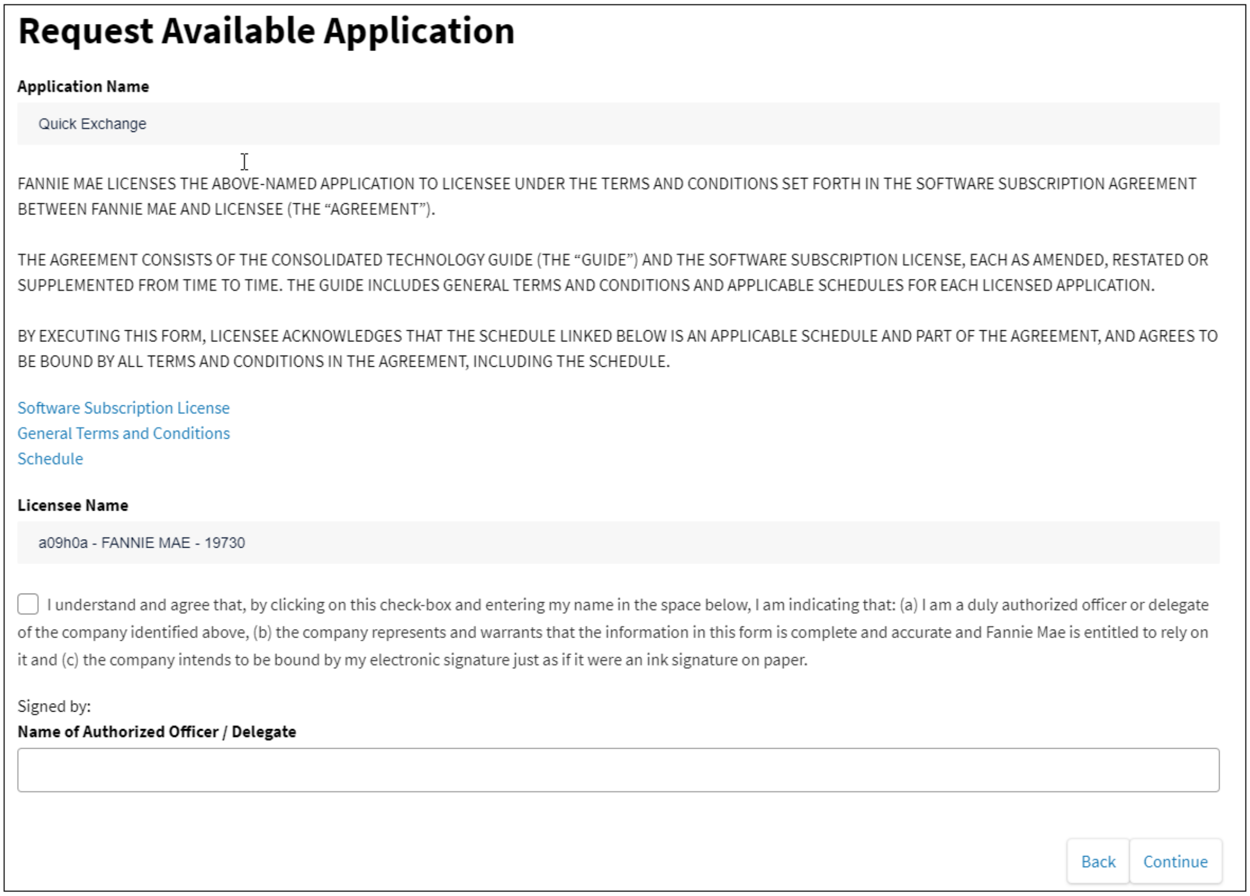
Note: *You may place your cursor over the icons shown on the screen to view messages for the application.*

4. Click the application you wish to set up for your organization.

> **Note:** *For Servicing Transfers, select **Quick Exchange**.*
>
> **Note:** *The selected application and description appear, along with information about whether agreement to Terms and Conditions are required.*

5. Click **Continue**.





Request Available Application

Application Name

Quick Exchange

FANNIE MAE LICENSES THE ABOVE-NAMED APPLICATION TO LICENSEE UNDER THE TERMS AND CONDITIONS SET FORTH IN THE SOFTWARE SUBSCRIPTION AGREEMENT BETWEEN FANNIE MAE AND LICENSEE (THE “AGREEMENT”).

THE AGREEMENT CONSISTS OF THE CONSOLIDATED TECHNOLOGY GUIDE (THE “GUIDE”) AND THE SOFTWARE SUBSCRIPTION LICENSE, EACH AS AMENDED, RESTATED OR SUPPLEMENTED FROM TIME TO TIME. THE GUIDE INCLUDES GENERAL TERMS AND CONDITIONS AND APPLICABLE SCHEDULES FOR EACH LICENSED APPLICATION.

BY EXECUTING THIS FORM, LICENSEE ACKNOWLEDGES THAT THE SCHEDULE LINKED BELOW IS AN APPLICABLE SCHEDULE AND PART OF THE AGREEMENT, AND AGREES TO BE BOUND BY ALL TERMS AND CONDITIONS IN THE AGREEMENT, INCLUDING THE SCHEDULE.

Software Subscription License
General Terms and Conditions
Schedule

Licensee Name

a09h0a - FANNIE MAE - 19730

☐ I understand and agree that, by clicking on this check-box and entering my name in the space below, I am indicating that: (a) I am a duly authorized officer or delegate of the company identified above, (b) the company represents and warrants that the information in this form is complete and accurate and Fannie Mae is entitled to rely on it and (c) the company intends to be bound by my electronic signature just as if it were an ink signature on paper.

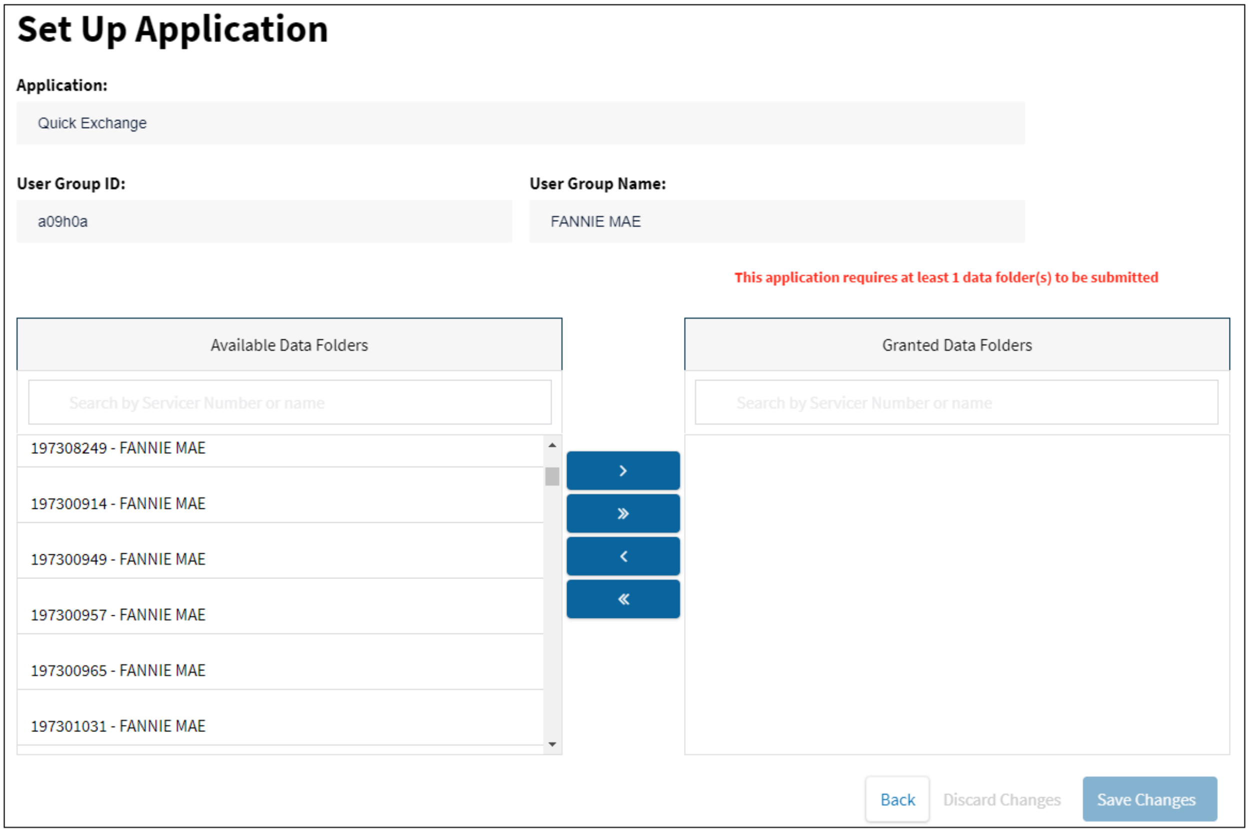
Signed by:
Name of Authorized Officer / Delegate

Back Continue

If…	Then…
the above screen appears…	• click **General Terms and Conditions** link. **Note:** *the document containing the Terms and conditions opens which can be reviewed and printed.* • click **checkbox**. • enter **Your Name**. • click **Continue**.
the above screen Does Not appear…	• proceed to next step.

> **Note:** *Depending on the application, the Set Up Applications screen may appear, with an Assign Data Folders section or Assign Institution section.*

If …	Then…
the screen below appears…	• select the data folder(s) from the left column you wish to assign to the application. • click "**>**"icon to add to the data folder.
the screen below Does Not appear…	• proceed to the next step.



6. Click **Save Changes**.

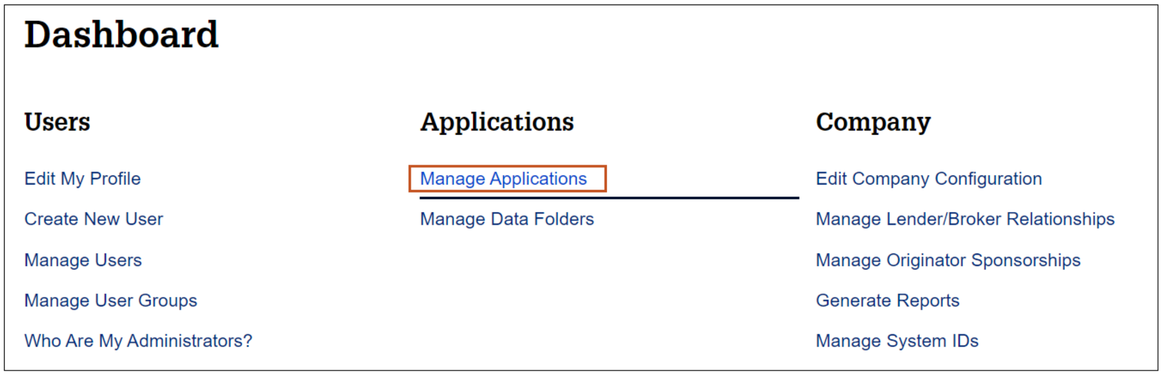
> **Note:** *The Manage Applications screen appears with the newly set up application appearing in the list within the Managed Applications Active panel.*

Request an Eligible Application

In addition to those listed in the Available Applications panel, an organization may be eligible, based on the organization's Technology Profile, to gain access to other applications that require setup assistance from a Fannie Mae Representative. Any eligible applications will appear in the Eligible Applications panel. This procedure enables you to request access to an Eligible Application for an organization.

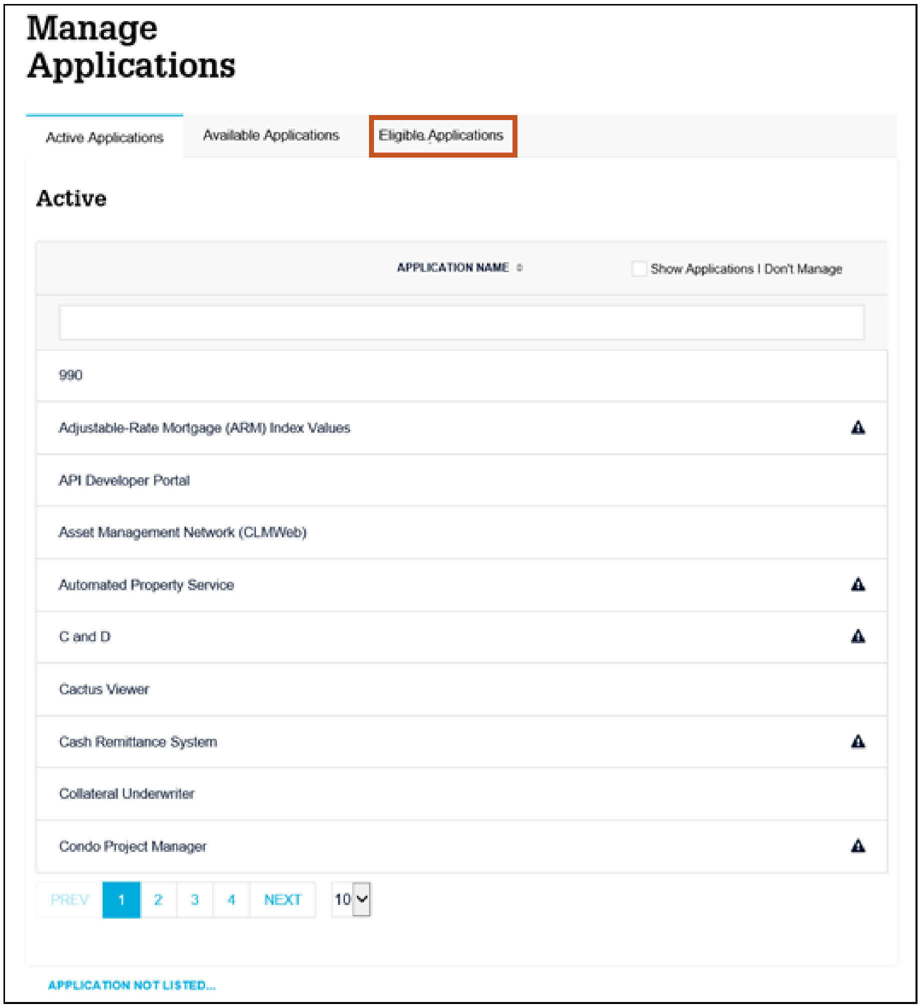
Follow the steps below to request an eligible application:

1. Click the **Manage Applications** link.



> **Note:** *The Manage Applications screen appears with a list of active available applications you can set up for your organization .*

2. Click **Eligible Applications** to change the list of applications displayed.

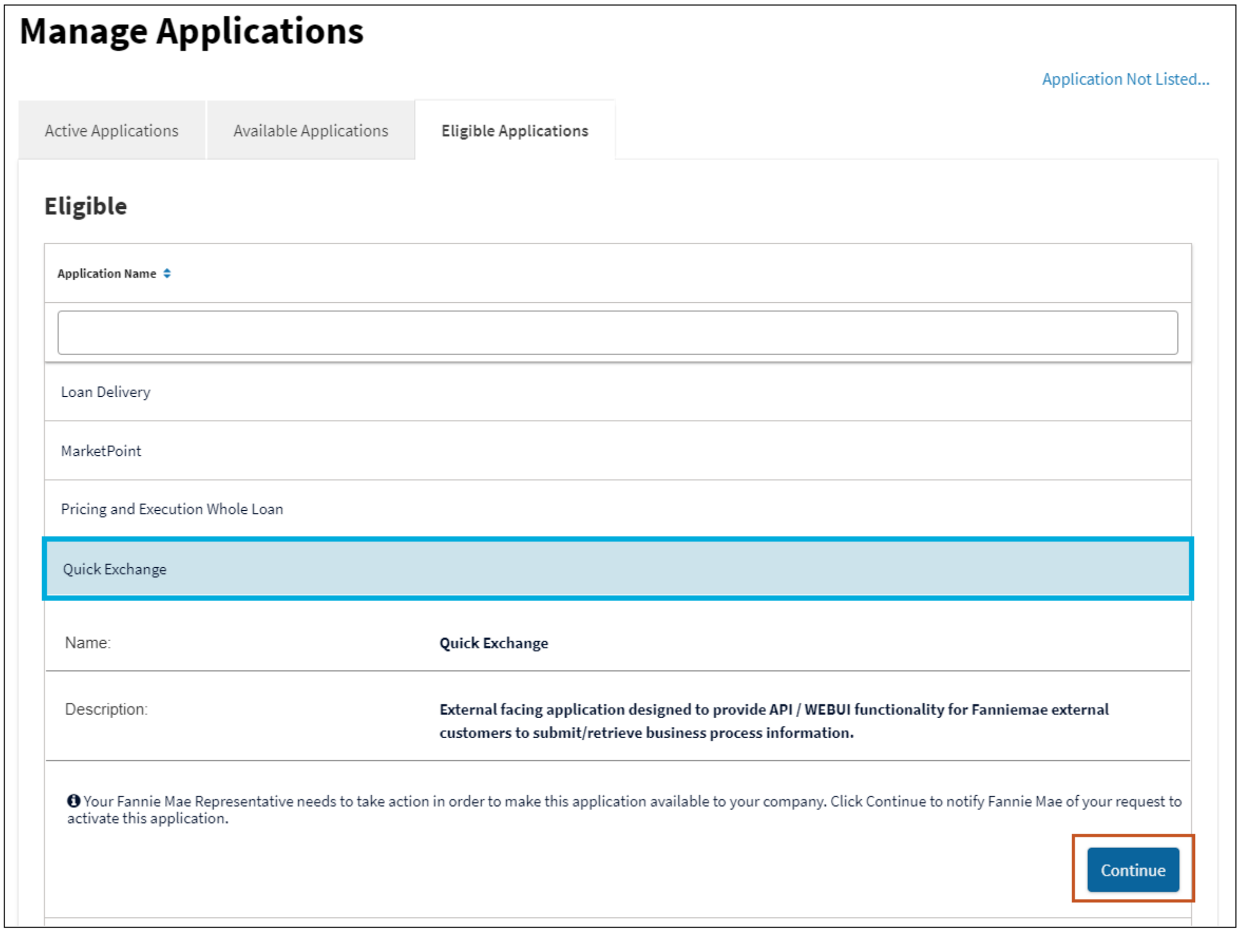


Note: *Place your cursor over the icons shown on the screen to view messages for the application.*

> **Note:** *The list of Eligible applications for the organization appears.*

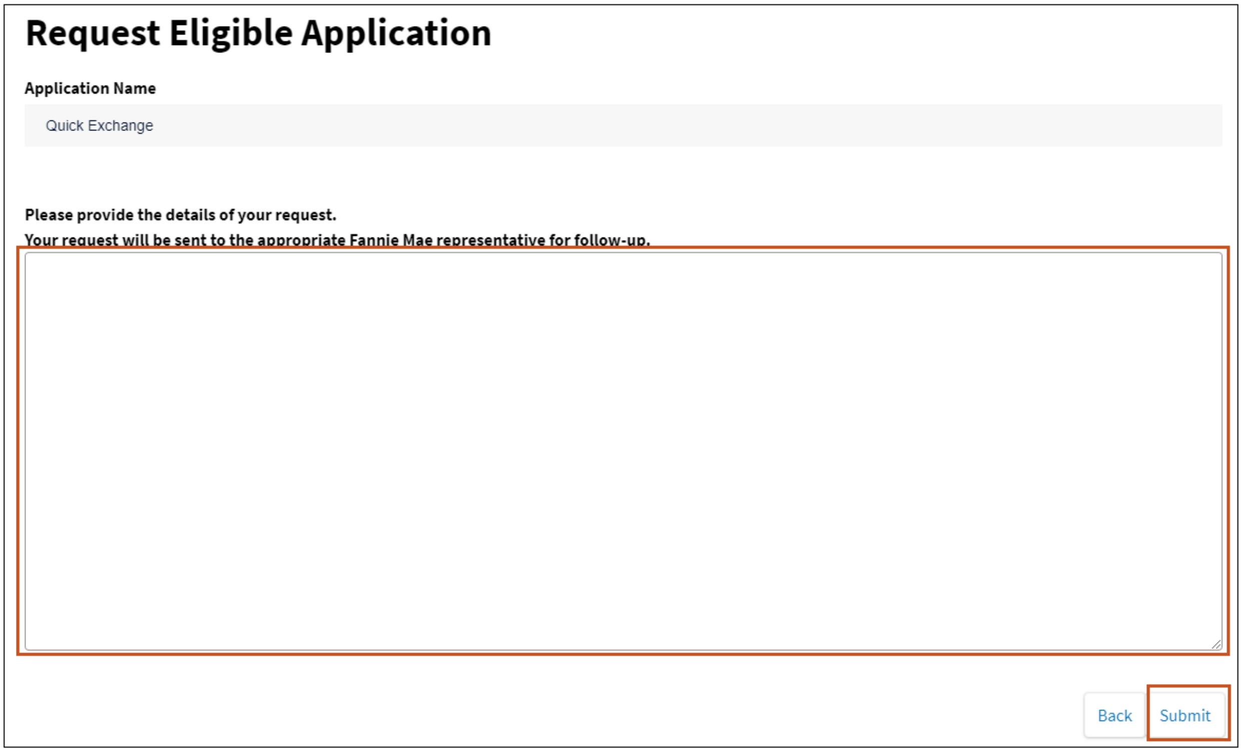
> **Note:** *The selected application name and description appears, along with information about whether agreement to Terms and Conditions are required.*

3. Select **Quick Exchange** application.
4. Click **Continue**.



Note: *The Request Eligible Application screen appears.*

5. Enter any details for your request.
6. Click **Submit**.



Note: *A Fannie Mae Representative will contact you regarding the request.*

Managing Users

As an administrator, use Technology Manager to create and manage users, and to authorize users' access to specific Fannie Mae applications that are available to a particular organization.

Setting up a new user includes the following steps:

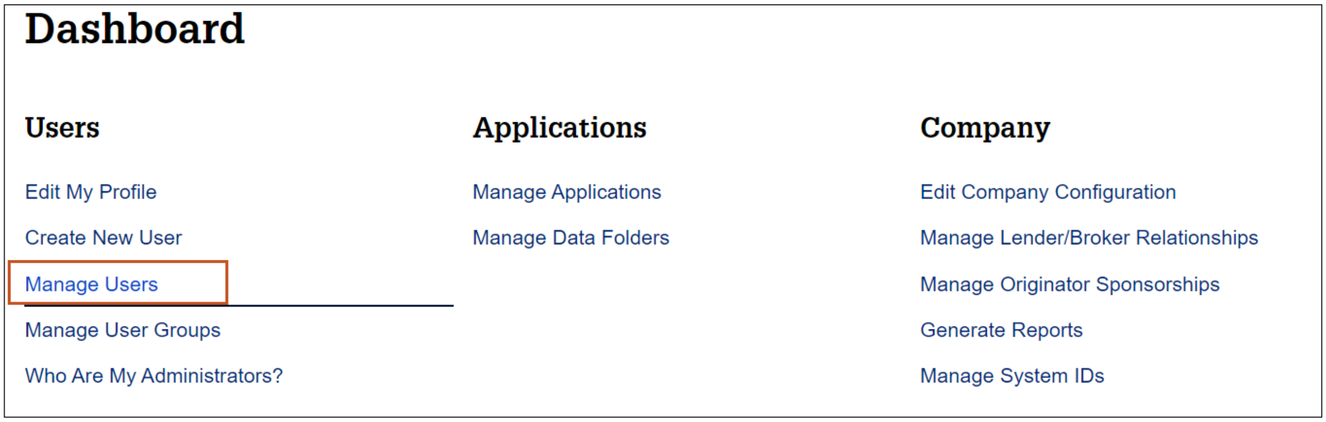
- Create a new user.
- Enter user profile information for the new user.
- Assign the user to a user group.
- Select the Fannie Mae application(s) the user is authorized to access.
- Assign user role(s) (if applicable).
- Assign the user to data folder(s) (if applicable).

Complete the steps listed above before the user can use the new user ID to access Fannie Mae technology applications. Repeat the entire process separately for each new user you want to add.

Grant a User Access to an Application

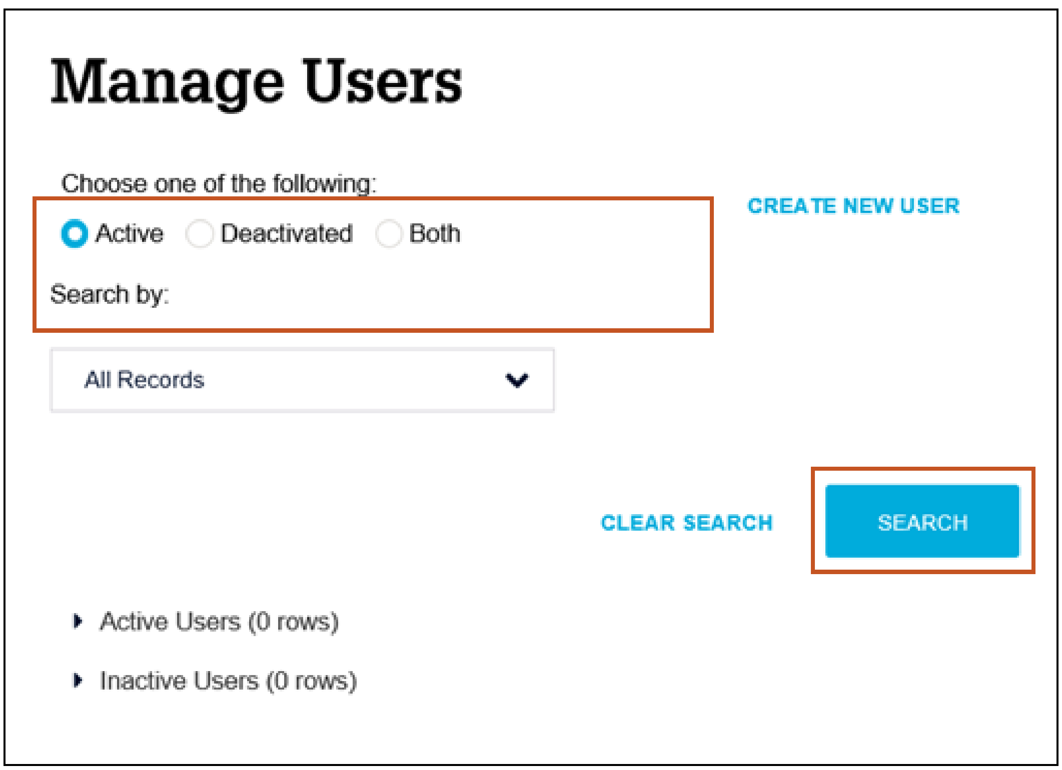
To enable a user's access to a specific Fannie Mae Technology application, follow the steps below:

1. Click the **Manage Users** link.



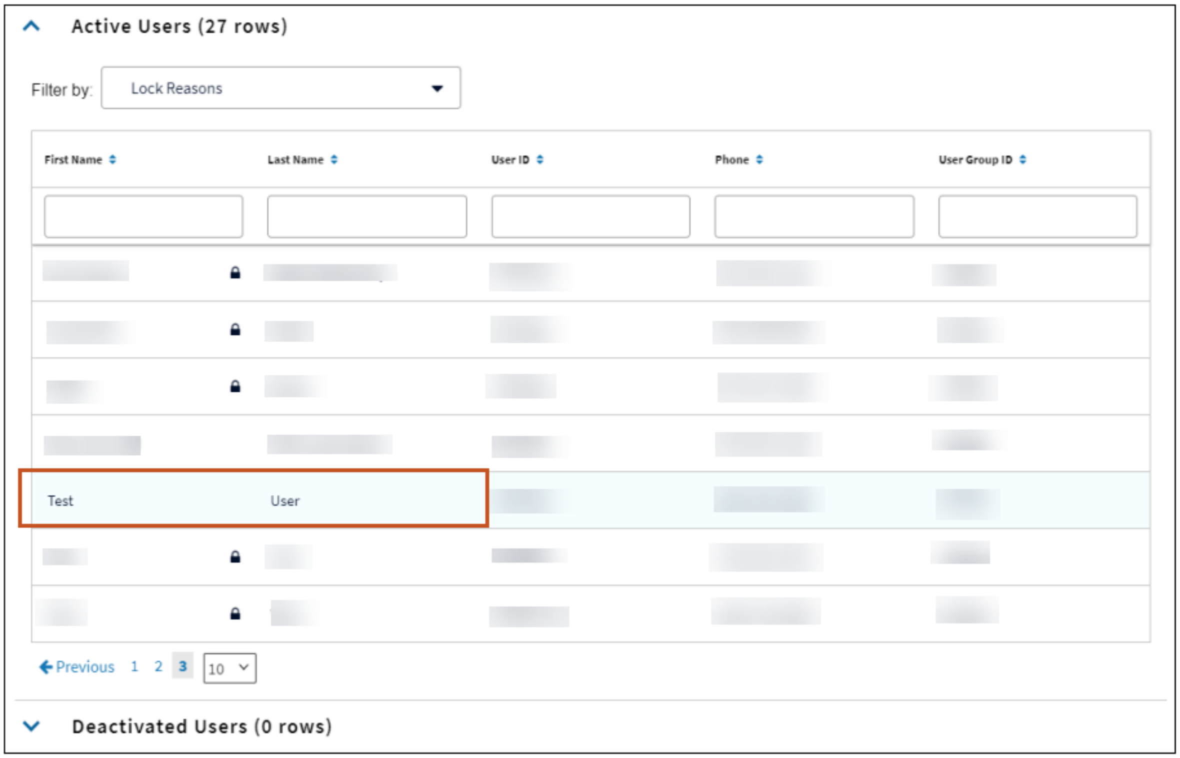
> **Note:** *The Manage Users screen appears.*

2. Enter the desired search criteria and search value.
3. Click **SEARCH**.



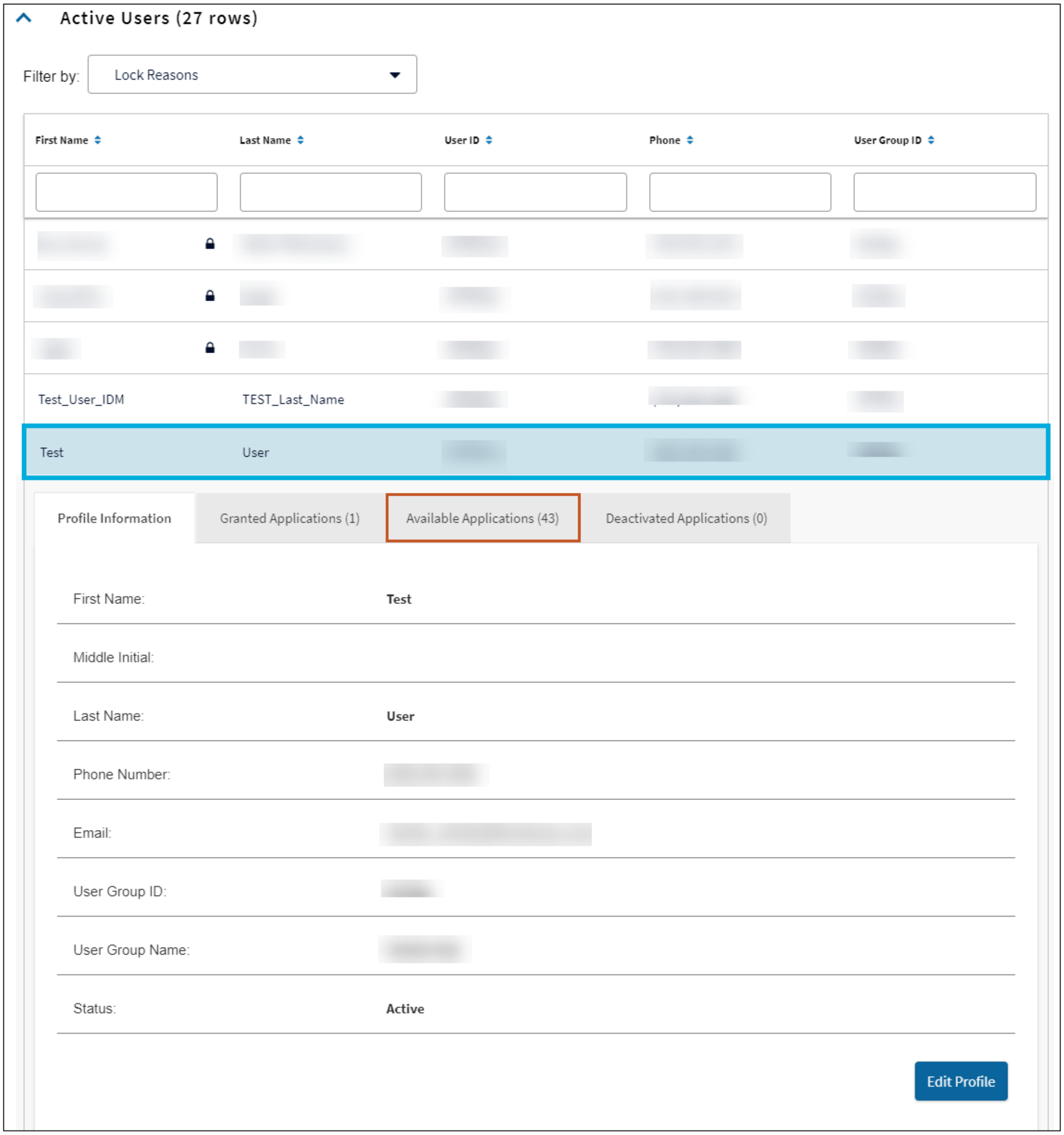
> **Note:** *Depending on the search you use, multiple users may be found. The number of records found appears above the list.*

4. Select the desired user record.



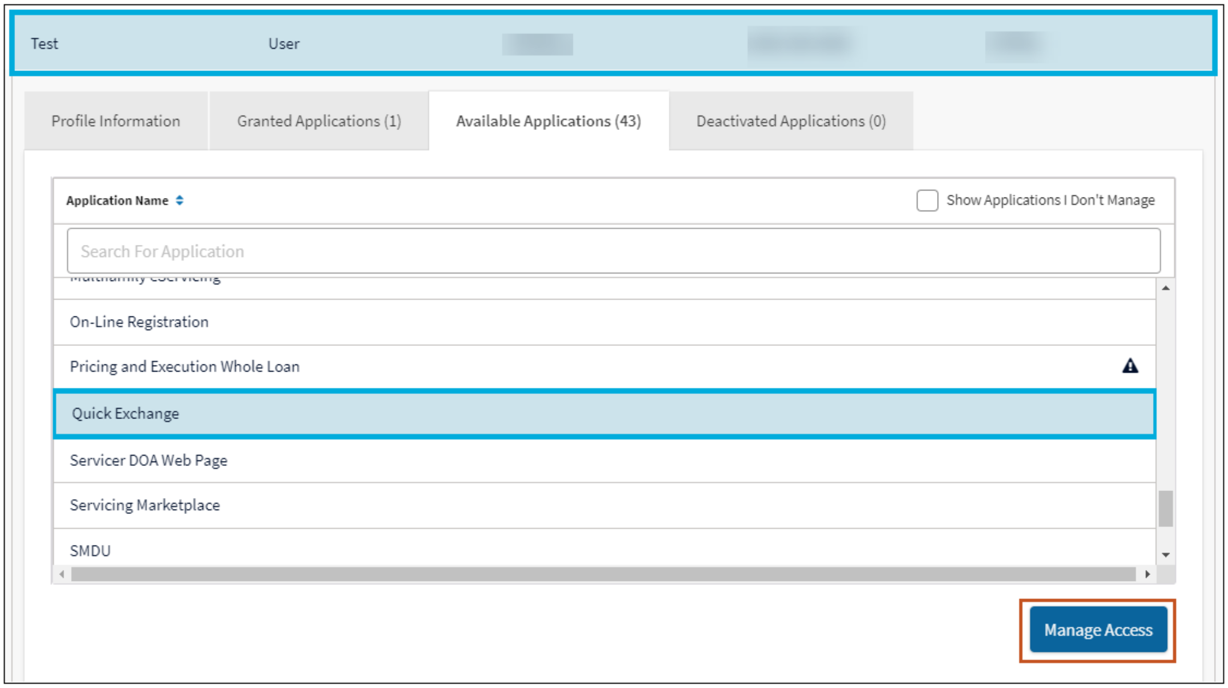
> **Note:** *Profile Information for the selected user appears.*

5. Click the **Available Applications** tab.



| **Note:** *A list of available applications appears.*

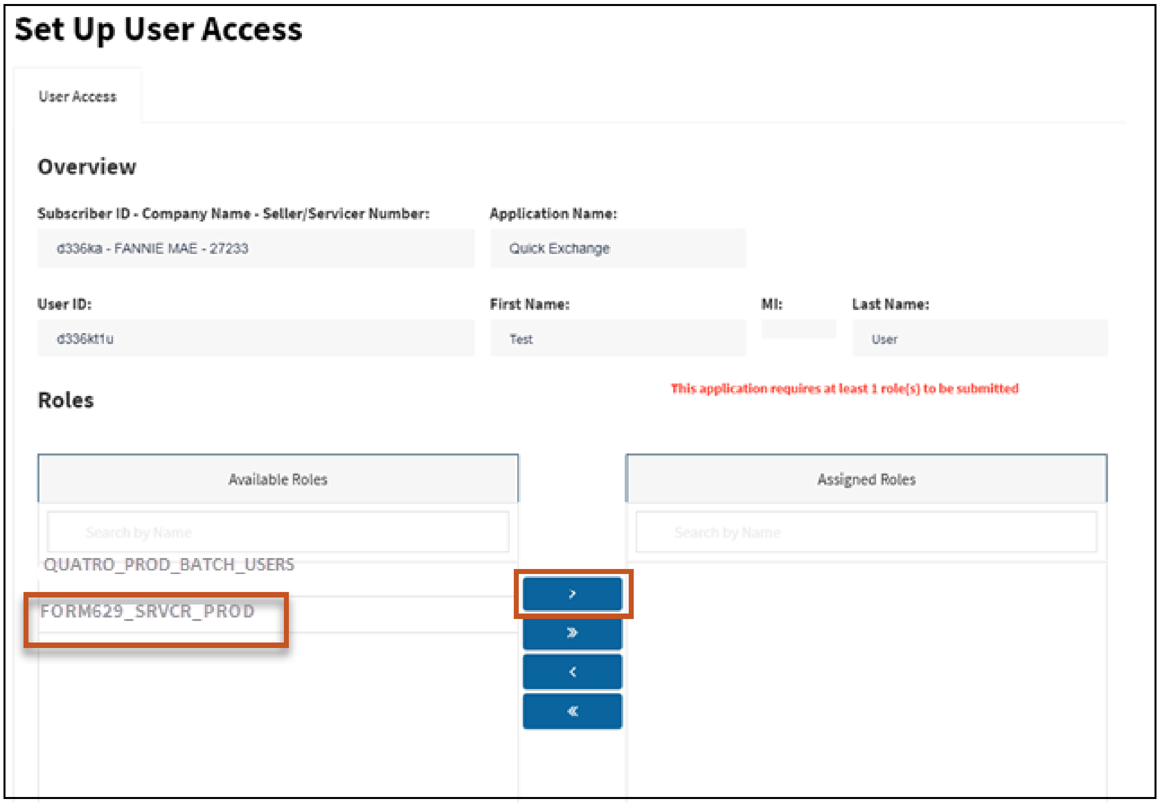
6. Select the **Quick Exchange** application.
7. Click **Manage Access**.



| **Note:** *The Set Up User Access screen appears In the Available Roles section.*

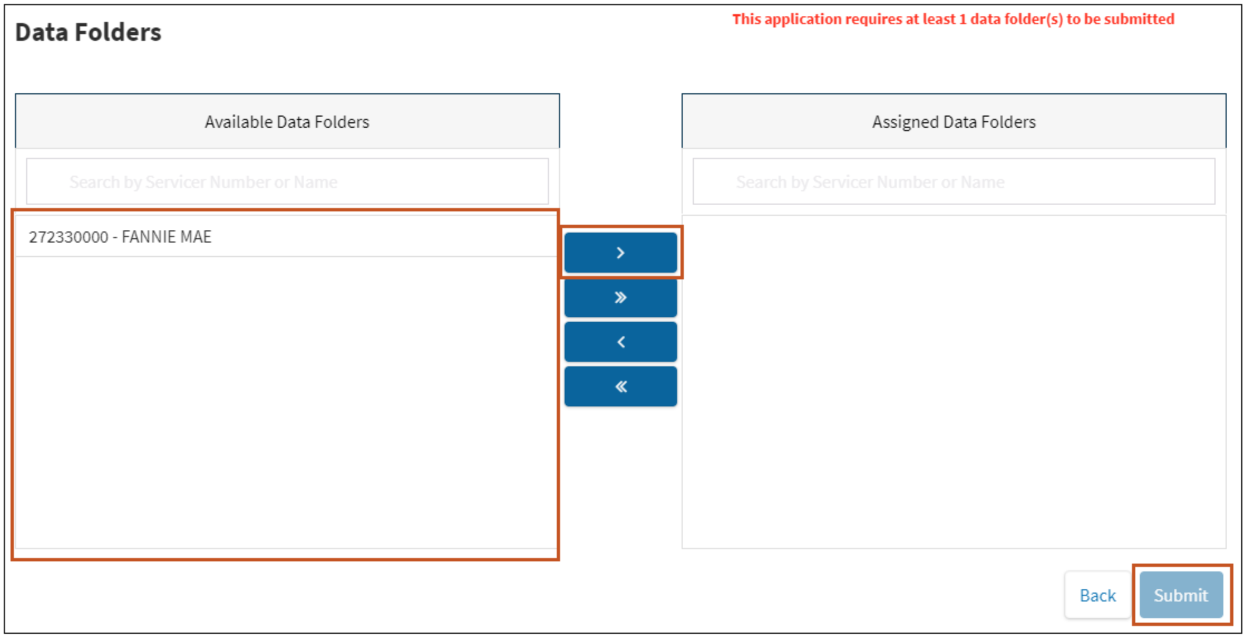
8. Select **FORM629_SRVCR_PROD**.
9. Click "**>**" icon.

> **Note:** *If the Roles section does not appear, proceed to the next step.*



> **Note:** *Select which data folder(s) the user will be able to access.*

10. Click “**>**” icon.
11. Click **Submit**.



> **Note:** *A confirmation window appears*

12. Click **CONTINUE**.

Additional Help

Access Help Center within the Technology Manager application:

- Click the **Help Center** link, which is found in the lower-right corner of any screen.

The Help Center provides the following features:

- **Frequently asked questions** – View FAQs pertaining to the screen you are currently viewing. Click on the question to obtain a more detailed answer.
- **Search feature** – Enter a question relating to the screen you are currently viewing and click **Find**.

Technology Support Center

- **Live Web Chat**– Submit a question and correspond online with a Customer Service Representative in Fannie Mae's Customer Contact Center. To access this feature, select Open a Web Chat on the Technology Support Center page on the Business Portal and follow the instructions provided. Live Web Chat is available Monday through Friday from 9:00 a.m. to 8:00 p.m., Eastern Time and 10:00 a.m. to 5:00 p.m. on Saturday.
- To contact the Technology Support Center call 1-800-2Fannie (1-800-232-6643) option 1 at the first prompt and option 1 at the second prompt.