

Uniform Collateral Data Portal Reference Series for the Lender Admin: 2 - Managing Business Units

This reference is the second in a series of four references for the Lender Administrator, a Uniform Collateral Data Portal® (UCDP®) user who has authority to set up and manage the business structure within the portal, including the access privileges of other users. This user is known as the lender admin. The focus of this reference is on managing business units. Business units contain lender users, Fannie Mae and Freddie Mac Seller Numbers, lender agent relationships, and subordinate business units. The other references in this series include:

- [Series 1: Lender Admin Registration](#)
- [Series 2: Managing Business Units](#)
- [Series 3: Managing Users](#)
- [Series 4: Managing Lender Agents](#)
- [Series 5: Managing Aggregator Profile](#)

The topics covered in this reference include:

- [Managing Business Units Overview](#)
- [Assigning and Removing Seller Numbers](#)
- [Creating a Child Business Unit](#)
- [Renaming a Business Unit](#)
- [Deleting a Business Unit](#)
- [Finding Additional Assistance](#)

Managing Business Units Overview

Your organization is initially set up with one business unit in the UCDP based on the information provided during the registration process. This is the primary, or parent, business unit. A business unit contains lender users, Fannie Mae and Freddie Mac Seller Numbers, lender agent relationships, and subordinate business units.

Once you have access to the portal, you must complete the initial setup of your business unit by assigning at least one Seller Number for each GSE, as applicable. You may not submit an appraisal data file to the portal until you assign at least one Seller Number to the parent business unit.

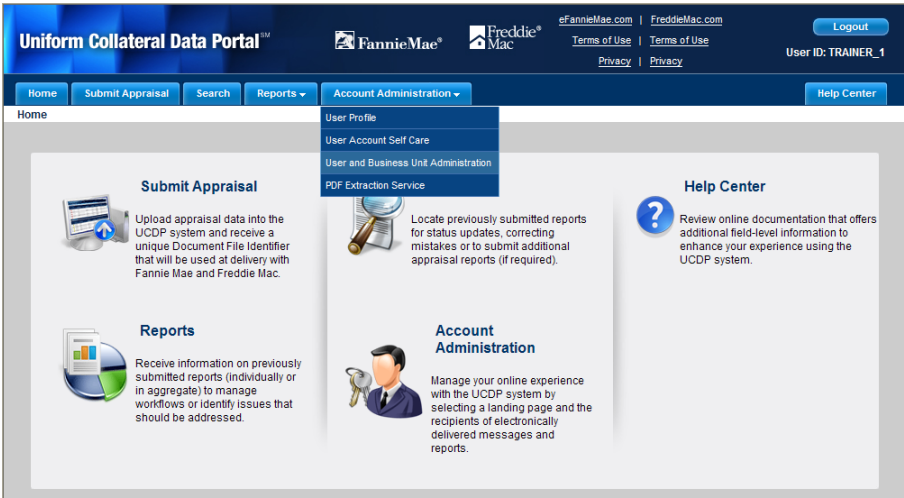
For most organizations, the primary business unit meets business needs. In the event your organization requires additional business units to meet your business process needs, the lender admin may add additional units, known as child business units. With child business units, you can further structure the amount of access other users have within the UCDP. For example, if your organizational structure has several branches or segments, you can optionally set up a similar structure in the UCDP and assign users to certain business units.

You can assign users to only one business unit at a time. Individual users can only see their assigned business unit and cannot see other business units in your organizational structure. A lender admin at the primary business unit level, however, has access to all business units. A lender admin in a child business unit has access to that business unit and all child business units.



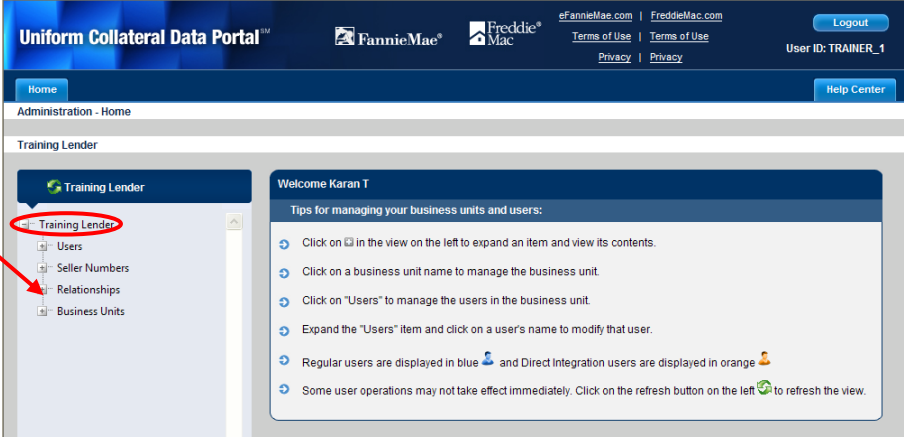
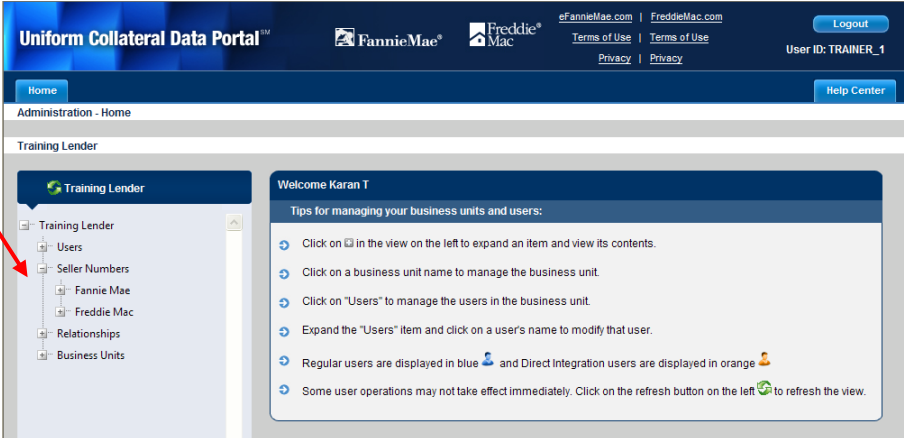
The functionality associated with a business unit includes:

Functionality	Description
Assigning and Removing Seller Numbers	Enables you to assign or remove Seller Numbers to/from a business unit.
Creating a Child Business Unit	Enables you to add another business unit in the UCDP where you can assign Seller Numbers.
Renaming a Business Unit	Enables you to rename a business unit to make organizing business units easier and meet current needs.
Deleting a Business Unit	Enables you to delete a business unit if it does not contain any submissions.

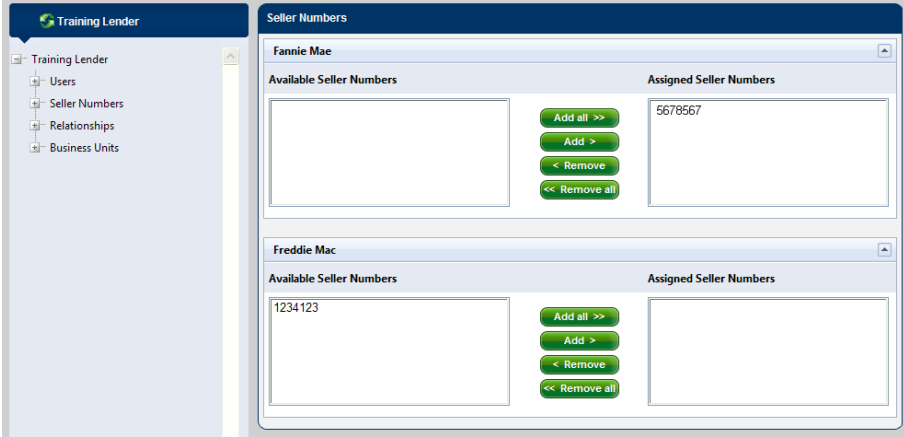
<p>Assigning and Removing Seller Numbers</p>	<p>Your organization's Seller Number(s) for each GSE is automatically entered into the UCDP as part of the initial setup process. For Fannie Mae, the Seller Number is your Seller/Service Number or Non-Seller/Service Number ID. For Freddie Mac, the Seller Number is your Seller/Service Number or Third Party Originator (TPO) Number. You must assign the Seller Number(s) to the parent and any child business unit(s). A Seller Number must accompany all appraisal data files submitted through a particular business unit for each GSE to whom the appraisal file is submitted.</p> <p>Most organizations typically transact business under one Seller Number for each GSE. If your organization uses more than one Seller Number for a single GSE, you can assign (add) or remove Seller Numbers to/from a business unit. This section focuses on assigning and removing Seller Numbers(s) for a particular business unit.</p> <p>To assign and remove Seller Numbers, follow these steps:</p>
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Assigning and Removing Seller Numbers	
Step	Action / Result
<p>1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.</p>	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>

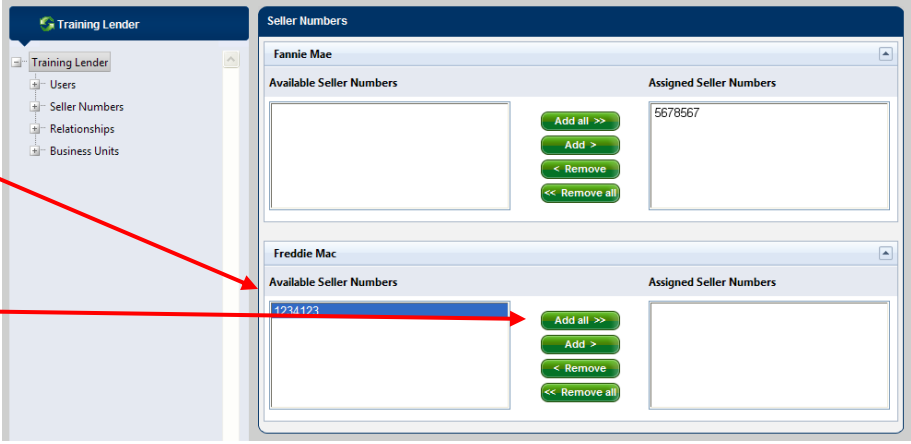
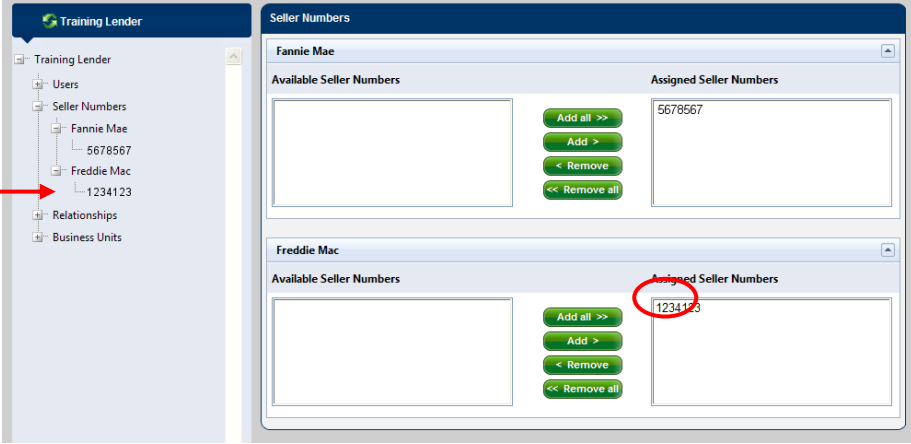
Assigning and Removing Seller Numbers

Step	Action / Result
<p>2. From the Administration – Home page, click Seller Numbers in the left navigation bar.</p> <p> Training Lender is the parent business unit in this example.</p> <p> Click the + to display the list of Seller Numbers assigned to the business unit for each GSE.</p>	 


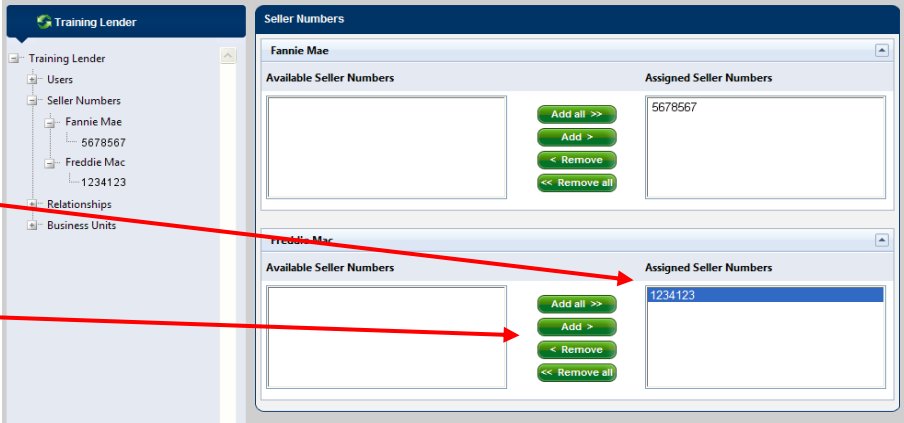
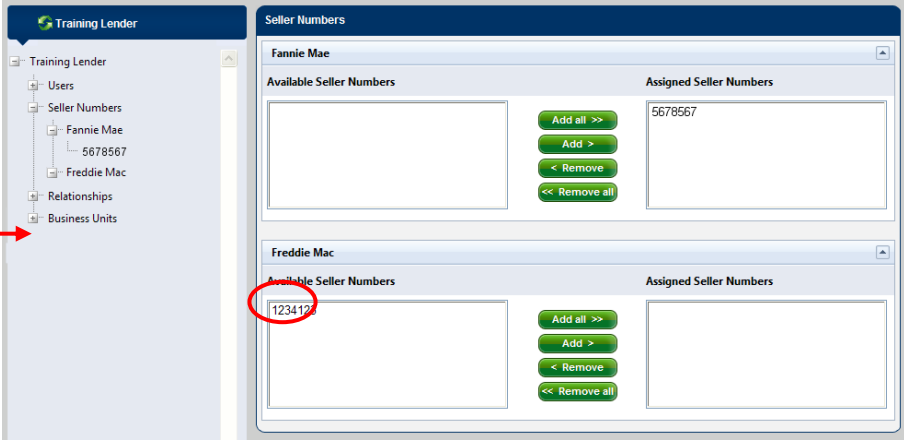
Assigning and Removing Seller Numbers

Step	Action / Result
	<p>After you select Seller Numbers from the left navigation bar, the Seller Numbers page appears.</p>  <p>This page allows you to select which Seller Numbers to assign (add) or remove from a business unit for each GSE, Fannie Mae and Freddie Mac.</p>

Assigning and Removing Seller Numbers

Step	Action / Result
<p>Assigning Seller Numbers</p> <p>3. From the Seller Numbers page, locate the list of Available Seller Numbers. Highlight a specific Seller Number in the Available Seller Numbers list and select Add.</p> <p>The Add all button allows you to assign all the Available Seller Numbers to the business unit at one time.</p>	
	<p>The Assigned Seller Numbers list now shows the added Seller Number. By opening the left navigation, you can also see the Seller Number(s) assigned by GSE.</p> 

Assigning and Removing Seller Numbers

Step	Action / Result
<p>Removing Seller Numbers</p> <p>4. From the Seller Numbers page, locate the list of Assigned Seller Numbers. Highlight a specific Seller Number in the Assigned Seller Number list to remove and select Remove.</p> <p>The Remove all button allows you to remove all the Assigned Seller Numbers from a business unit at one time.</p> <p> Each business unit needs at least one assigned Seller Number for each GSE to successfully submit appraisal data files to that GSE.</p>	
	<p>The Assigned Seller Numbers list now shows that the Seller Number is removed. It reappears in the Available Seller Numbers list. By opening or refreshing the left navigation, you can also see the Seller Number(s) removed from the GSE.</p> 

Creating a Child Business Unit

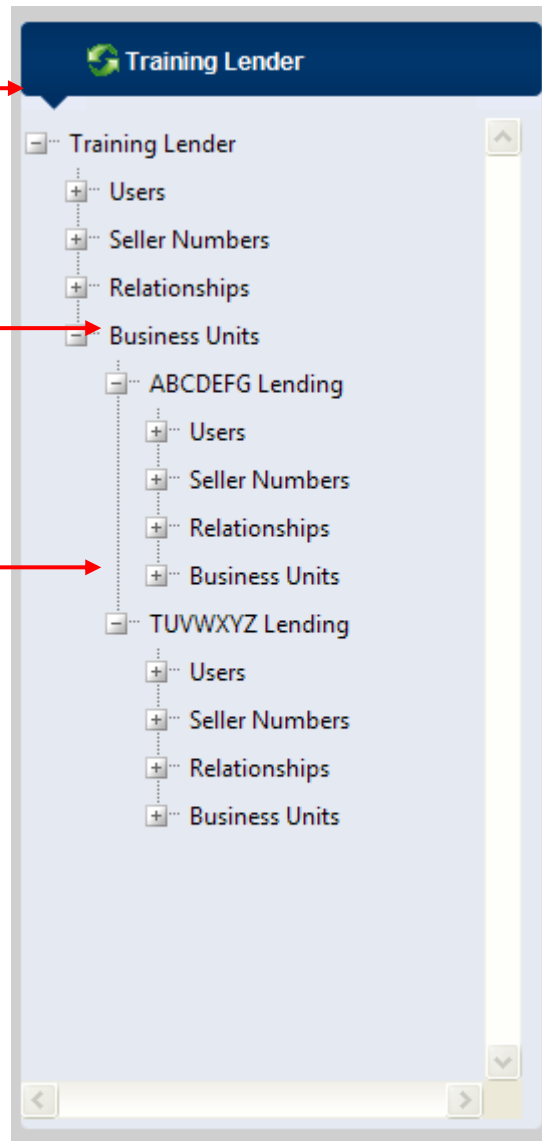
You may create additional business units to accommodate your organizational structure and changing business needs. Each created child business unit contains the same components as the parent business unit including: Users, Seller Numbers, Relationships and Business Units.

In this example, Training Lender is the parent business unit. The two child business units underneath Training Lender are ABCDEFG Lending and TUVWXYZ Lending. You can add more business units anywhere within this structure.

Parent Business Unit

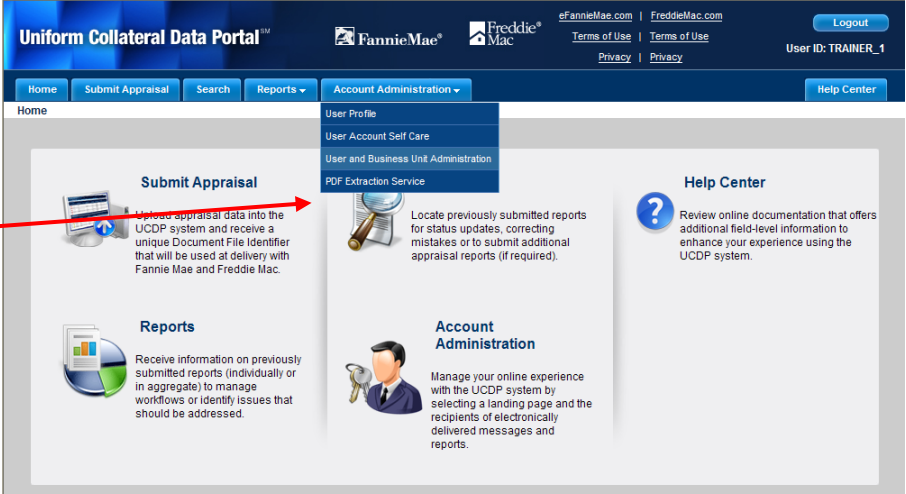

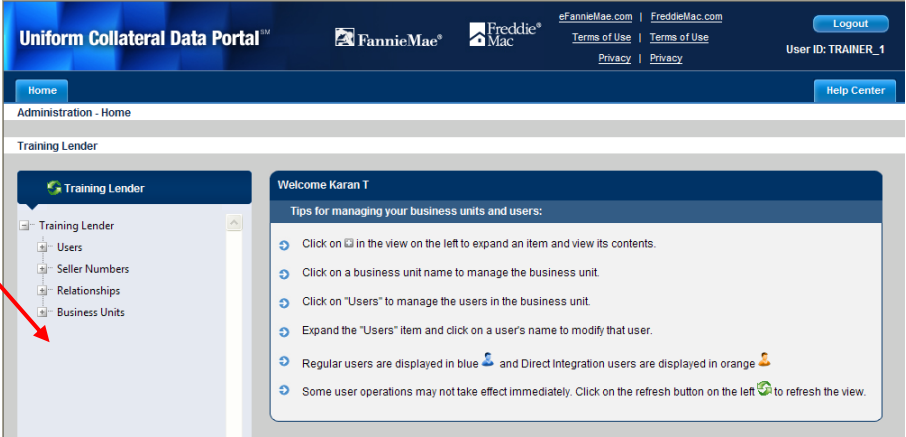
Child Business Unit

Child Business Unit

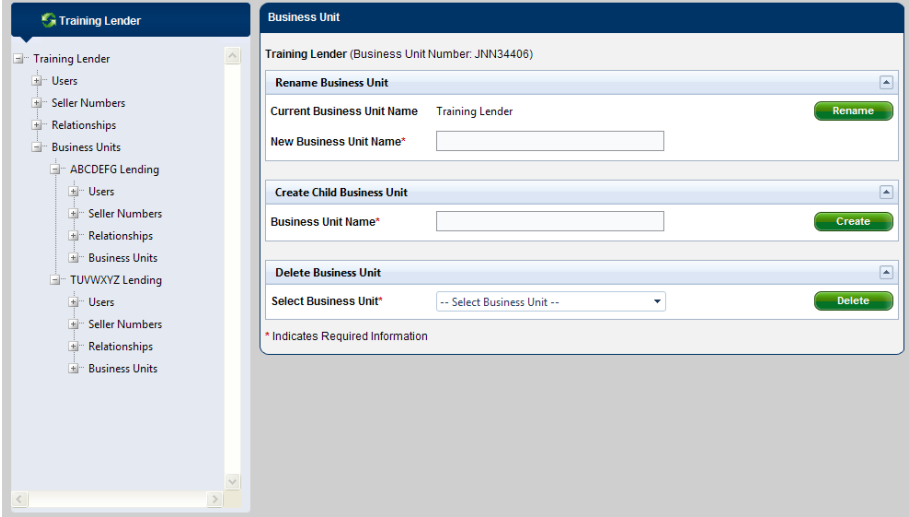

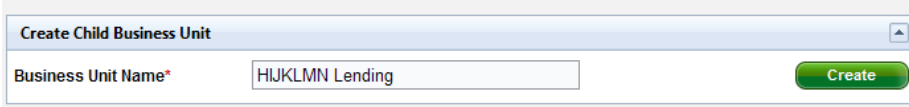


To create a child business unit, follow these steps:

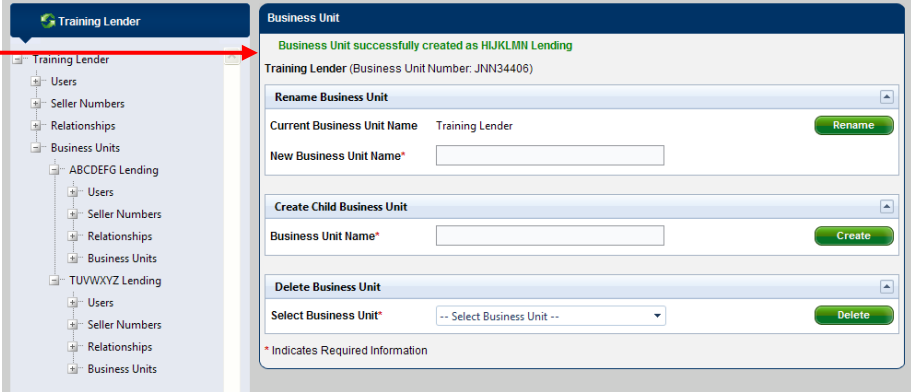
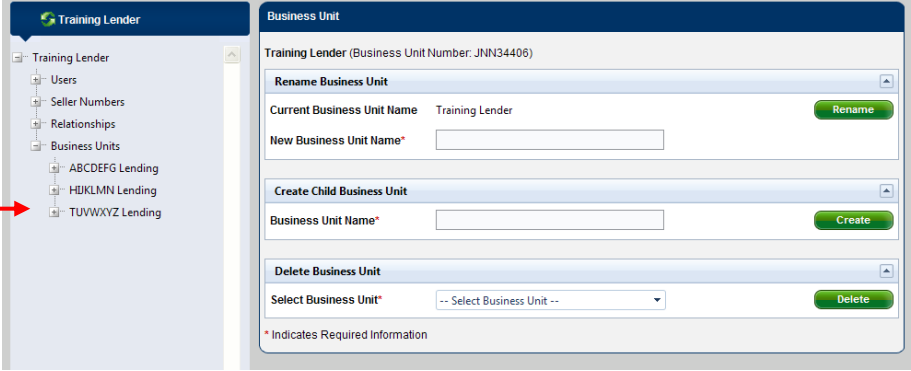
Creating a Child Business Unit


Step	Action / Result
<p>1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.</p>	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>
<p>2. From the Administration - Home page, click Business Units in the left navigation bar.</p> <p> Click the + to display the list of existing child business units, if any.</p>	

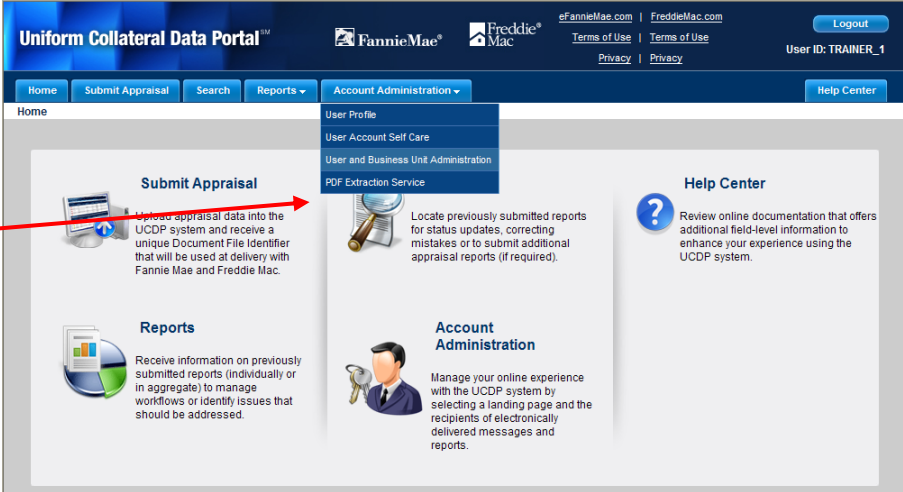
Creating a Child Business Unit

Step	Action / Result
	<p>After you select Business Units from the left navigation bar, the Administration – Business Units page appears.</p>  <p>This page allows you to manage your business unit(s). You can rename, create, or delete a business unit. This section focuses on creating a child business unit.</p> <p> The Aggregator Setup section at the bottom of the page allows you to manage your aggregator profile. Refer to Series 5: Managing Aggregator Profiles for information related to aggregator setup.</p>
<p>3. From the Administration – Business Unit page, locate the Create Child Business Unit section and enter the name of the new business unit in the Business Unit Name field.</p> <p>Click Create.</p>	

Creating a Child Business Unit

Step	Action / Result
	<p>After you click Create, a Business Unit successfully created as HIJKLMN Lending (name of the business unit) message appears.</p>  <p>The screenshot shows the 'Business Unit' management interface. The left navigation pane is expanded to show 'Business Units' under 'Training Lender'. A red arrow points to the 'Business Units' sub-item. The main content area displays a message: 'Business Unit successfully created as HIJKLMN Lending'. Below the message are three sections: 'Rename Business Unit', 'Create Child Business Unit', and 'Delete Business Unit'. The 'Rename Business Unit' section shows 'Current Business Unit Name' as 'Training Lender' and a 'New Business Unit Name*' field. The 'Create Child Business Unit' section shows a 'Business Unit Name*' field. The 'Delete Business Unit' section shows a 'Select Business Unit*' dropdown menu. A red arrow points to the 'Business Units' sub-item in the left navigation pane.</p> <p>You can see the business unit added to the left navigation after you click Business Units to close the navigation structure and then click Business Units to re-open the navigation structure.</p>  <p>The screenshot shows the 'Business Unit' management interface. The left navigation pane is expanded to show 'Business Units' under 'Training Lender'. A red arrow points to the 'HIJKLMN Lending' sub-item. The main content area displays a message: 'Business Unit successfully created as HIJKLMN Lending'. Below the message are three sections: 'Rename Business Unit', 'Create Child Business Unit', and 'Delete Business Unit'. The 'Rename Business Unit' section shows 'Current Business Unit Name' as 'Training Lender' and a 'New Business Unit Name*' field. The 'Create Child Business Unit' section shows a 'Business Unit Name*' field. The 'Delete Business Unit' section shows a 'Select Business Unit*' dropdown menu. A red arrow points to the 'HIJKLMN Lending' sub-item in the left navigation pane.</p>

<h3>Renaming a Business Unit</h3>	<p>Renaming a business unit is a way to help organize your user setup in business terms and provides another way to help meet changing business needs. When your organization makes organizational changes, you can use this functionality to better align with those changes and update the business unit name to something more suitable.</p> <p> Although there are no impacts to a user's level of access under the business unit, be sure to communicate any business unit name changes to your users.</p> <p>To rename a business unit, follow these steps:</p>
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Renaming a Business Unit	
Step	Action / Result
<p>1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.</p>	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>

Renaming a Business Unit

Step	Action / Result
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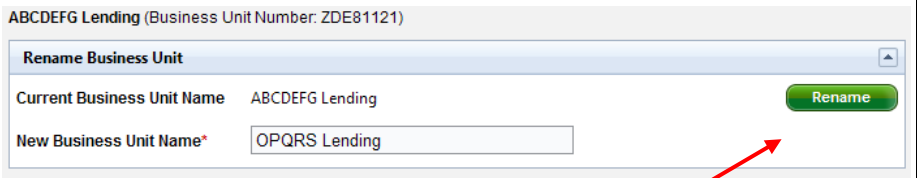
2. From the **Administration – Home** page, click on the to display the list of existing child business units.

Then select the business unit being renamed.

After you select the business unit to be renamed from the left navigation bar, the **Administration – Business Units** page appears.

This page allows you to manage your business unit(s). You can rename, create, or delete a business unit. The focus of this section is on renaming a business unit.

The Aggregator Setup section at the bottom of the page allows you to manage your aggregator profile. Refer to [Series 5: Managing Aggregator Profiles](#) for information related to aggregator setup.

Renaming a Business Unit	
Step	Action / Result
<p>3. From the Administration – Business Units page, locate the Rename Business Unit section and enter the new name in the New Business Unit Name field.</p> <p> <i>If you try to rename the business unit to the same name as an existing business unit's name, you receive a message indicating you need to use a different name.</i></p> <p>Click Rename.</p>	

Renaming a Business Unit

Step

Action / Result

After you click **Rename**, a **Business Unit successfully renamed as OPQRS Lending** (name of the business unit) message appears.



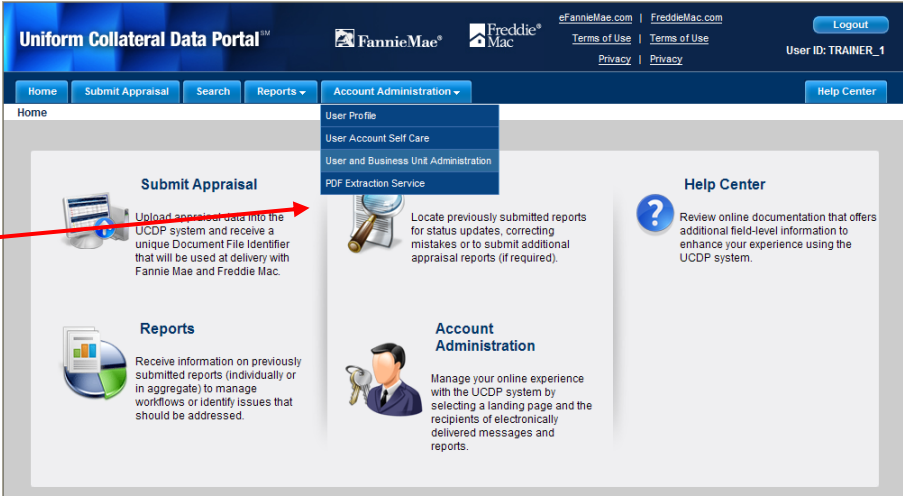
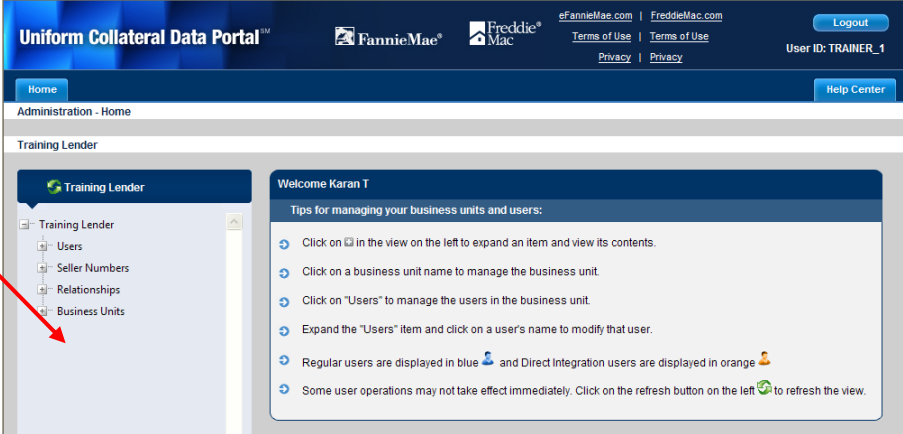
Renaming a business unit has no impacts on the existing submissions associated with the business unit. The submissions remain with the renamed business unit.

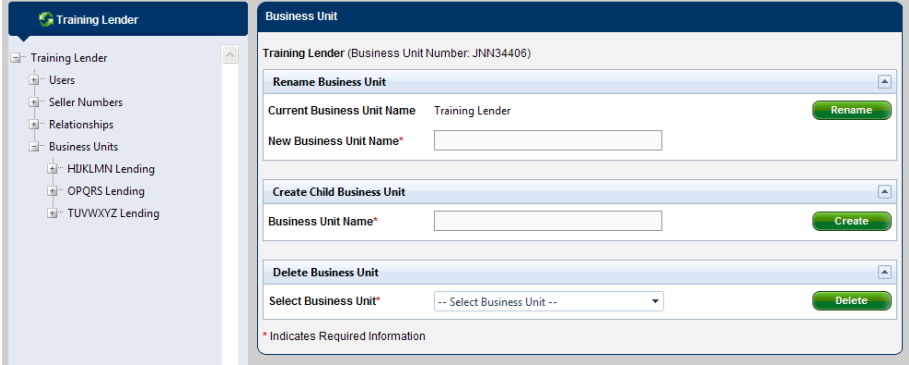


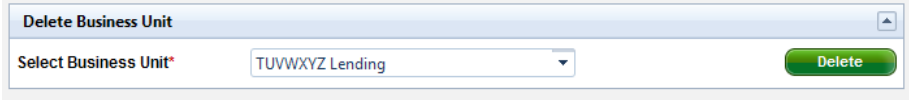
The screenshot shows the 'Business Unit' management interface. The left navigation pane is expanded to show 'Business Units' with sub-items: ABCDEFG Lending, HIJKLMN Lending, and TUVWXYZ Lending. The main content area displays a success message: 'Business Unit successfully renamed as OPQRS Lending'. Below the message is the 'Rename Business Unit' form, which includes a 'Current Business Unit Name' field (pre-filled with 'OPQRS Lending') and a 'New Business Unit Name*' field. There are also sections for 'Create Child Business Unit' and 'Delete Business Unit'.

You can see the renamed business unit (**OPQRS Lending**) in the left navigation after you click **Business Units** to close the navigation structure and then click **Business Units** to re-open the navigation structure.

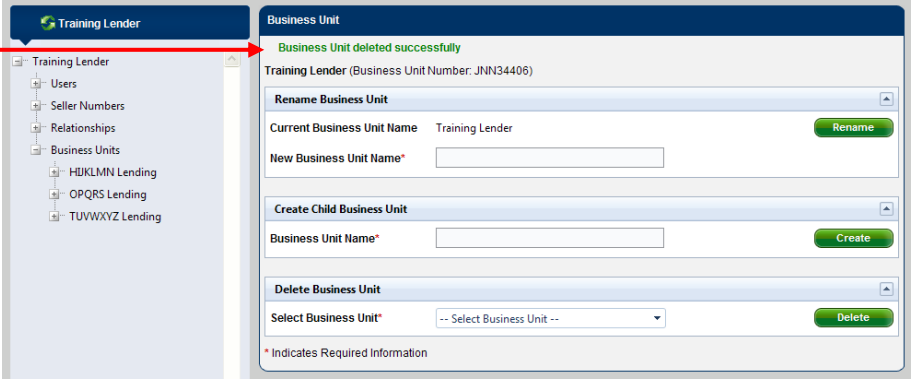
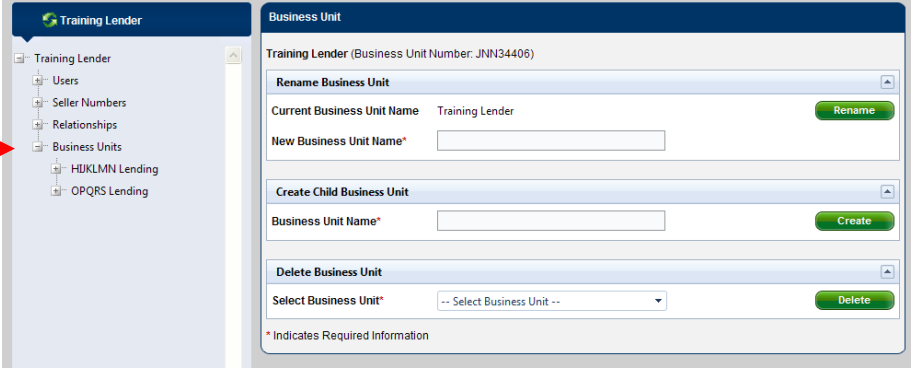
The screenshot shows the 'Business Unit' management interface after the navigation structure has been re-opened. The left navigation pane is expanded to show 'Business Units' with sub-items: HIJKLMN Lending, OPQRS Lending, and TUVWXYZ Lending. A red arrow points to the 'OPQRS Lending' item. The main content area displays the 'Business Unit' management interface for 'OPQRS Lending' (Business Unit Number: ZDE81121), including the 'Rename Business Unit' form.

<p>Deleting a Business Unit</p>	<p>Deleting a business unit is another way to help manage your business units. Only business units that have never had submissions associated with them can be deleted. The existence of submissions in a business unit prevents the deletion of that business unit, and you cannot transfer appraisal submissions from one business unit to another.</p> <p>Prior to deleting a business unit, all seller numbers need to be unassigned, all users transferred or deleted, and all relationships cancelled. You cannot delete a parent business unit.</p> <p>To delete a business unit, follow these steps:</p>
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Deleting a Business Unit	
Step	Action / Result
<p>1. From the UCDP <i>Home</i> page, click the Account Administration tab and select User and Business Unit Administration.</p>	 <p>After you select User and Business Unit Administration, the Administration - Home page appears.</p>
<p>2. From the Administration - Home page, click Business Units in the left navigation bar. Click on the + to display the list of existing child business units.</p>	

Deleting a Business Unit	
Step	Action / Result
	<p>After you select Business Units from the left navigation bar, the Administration – Business Units page appears.</p>  <p>This page allows you to manage your business unit(s). You can rename, create, or delete a business unit. The focus of this section is on deleting a business unit.</p> <p> The Aggregator Setup section at the bottom of the page allows you to manage your aggregator profile. Refer to Series 5: Managing Aggregator Profiles for information related to aggregator setup.</p>
<p>3. From the Administration – Users page, locate the Delete Business Unit section and select the business unit you wish to delete from the Select Business Unit dropdown.</p> <p>Click Delete.</p> <p> Deleting a business unit is a permanent action and cannot be undone.</p>	

Deleting a Business Unit

Step	Action / Result
	<p>After you click Delete, a Business Unit deleted successfully message appears.</p>  <p>The screenshot shows the 'Business Unit' management page for 'Training Lender'. A green message at the top states 'Business Unit deleted successfully'. The left navigation pane shows a tree structure with 'Business Units' expanded, listing 'HIJKLMN Lending', 'OPQRS Lending', and 'TUVWXYZ Lending'. A red arrow points from the 'Delete' button in the 'Delete Business Unit' section to the 'Business Units' folder in the navigation pane.</p>
	<p>You can see the business unit (TUVWXYZ Lending) is removed from the left navigation after you click Business Units to close the navigation structure and then click Business Units to re-open the navigation structure.</p>  <p>The screenshot shows the same 'Business Unit' management page. The left navigation pane now only lists 'HIJKLMN Lending' and 'OPQRS Lending', with 'TUVWXYZ Lending' removed. A red arrow points from the 'Business Units' folder in the navigation pane to the 'Delete Business Unit' section.</p>

Finding Additional Assistance	For additional assistance, refer to: <ul style="list-style-type: none">▪ Fannie Mae's UCDP web page▪ Freddie Mac's UCDP web page▪ The UCDP Support Center at 1-800-917-9291▪ UCDP Help Center (accessible after you log in to the UCDP)
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