

FCA explains RegData: video transcript

Submitting and Managing PSD Data



Product Sales Data (PSD) provides us with information on the sales of **investment, home finance, short-term loans**, a limited range of **pure protection products**, plus the performance data for **mortgages**

In this video, you will find out how to:

1. Submit PSD data via online forms
2. Upload an XML with PSD data
3. Search your PSD Report History
4. Search your PSD Transaction History
5. Cancel a PSD report
6. Amend and cancel a PSD transaction

Note: You can also submit PSD data via sFTP upload, this video will not cover this. For more information on sFTP upload, please refer to the technical guides on the RegData page of the FCA website

1. Submitting PSD data via online forms

Hover over **Product Sales Data** at the top of the screen

Then hover over **Prepare Report**

Click on the **PSD item** you wish to report for - you will only see the reports you have permissions to submit

If you are preparing PSD001 - Mortgage or PSD007 - Mortgage Performance Sales Data, click the version of the PSD form you wish to complete. The version of the form is dependent on the date of the transaction was made

In the Report Details screen, you can add each transaction required

Click **ADD TRANSACTION**

Fill in all the details on the form for the transaction. Fields with a red asterisk (*) are mandatory

You can save your data by clicking **SAVE DATA**

Once all mandatory and other fields you wish to provide data for have been completed, click **VALIDATE DATA**

If there are any errors in the data entered, these will be presented at the top of the screen

You will need to resolve all errors, and validate data once again

Once the transaction has been successfully added, you will receive confirmation at the top of the screen and taken to the report details page. You will need to repeat the form for each transaction you need to submit – click **ADD TRANSACTION**

Once all transactions have been added, click **VALIDATE REPORT**

You will receive confirmation at the top of the screen once the report has been successfully validated.
Note: at this stage your data has not been submitted

Once your report has been successfully validated, click **Submit Report**

You will be asked to confirm your submission. Click **Submit** if you wish to proceed

You will receive confirmation once your report has been successfully submitted at the top of the page

2. Upload an XML with PSD data

Hover over **Product Sales Data** at the top of the screen

Click **Upload PSD Data**

On the Upload Product Sales Data screen, click **UPLOAD DATA**

You will be presented with a pop up. Click where it says **click here to choose a file...**, and then find the file you wish to upload from your computer

Then click **Upload File**

You will get a pop up once your file has been successfully uploaded. Click **CLOSE**

Your uploaded data will be validated. If there are any errors, you will need to resolve these in the XML file before reuploading

3. Searching your Report History

To search your report history, hover over **Product Sales Data** at the top of the screen

Click **Report History**

You will be presented with your Report History, with one year's data displayed by default. You can use the Report Status, Report Type, or Submitted Date filters to narrow your results, and view over a year's worth of data

4. Searching your Transaction History

To search your transaction history, hover over **Product Sales Data**

Then hover over **Transaction History**

Click on the **PSD** you wish to see previous transactions for

You will be presented with your Transaction History. You can use the Transaction Reference, Transaction Status, Transaction Date or Submitted Date filters to narrow your results

5. Cancelling a Report

Navigate to your Report History, and click **next to the report** you wish to cancel

Click **CANCEL REPORT**

You will get a pop up to provide a reason for cancellation. Select this from the mandatory drop down menu, and provide additional notes if required

Click **CONFIRM**

You will receive confirmation of cancellation at the top of the page

To amend a transaction, navigate to your Transaction History, and click **next to the transaction** to be amended

Click **AMEND TRANSACTION**

You will get a pop up to confirm you want to amend the transaction. Click **YES** if you wish to confirm and continue

You will then be taken to the Report Details page where you will find a draft version of the transaction which can be amended

To cancel a transaction, navigate to your Transaction History, and click **next to the transaction** to be cancelled

Click **CANCEL TRANSACTION**

You will be asked to confirm your wish to cancel the transaction. Click **YES** if you wish to proceed