Quick Exchange – Manage Contacts User Guide

July 2023

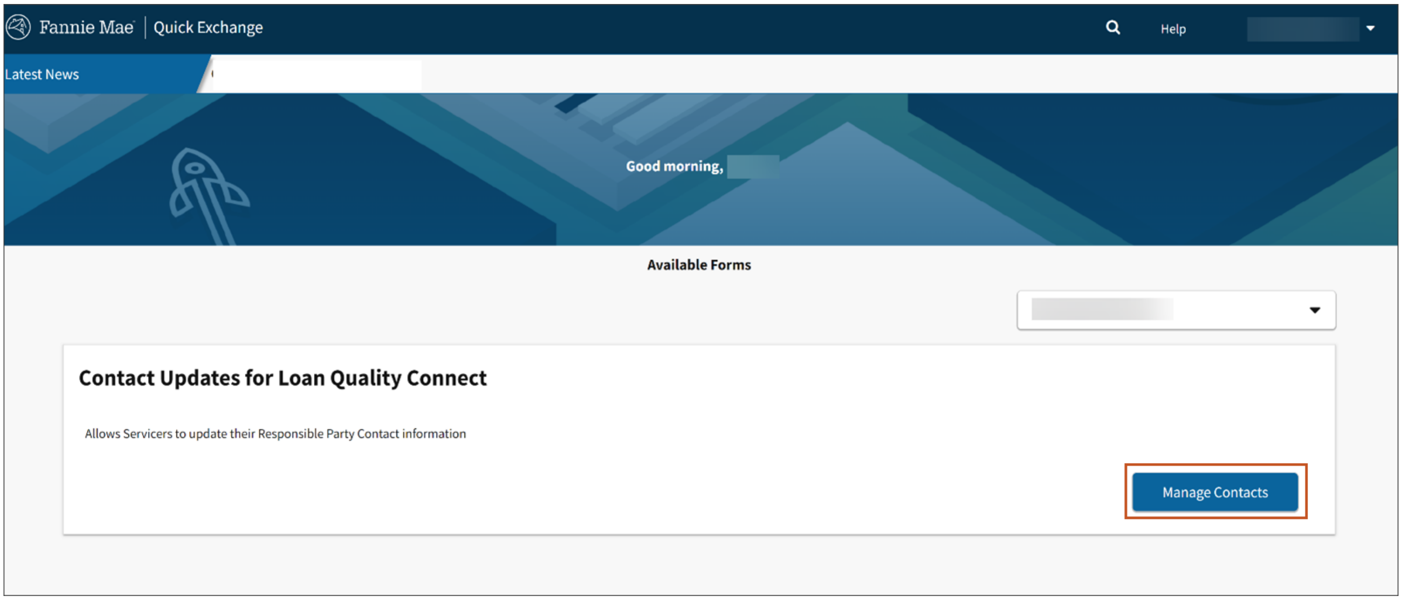
Quick Exchange – Manage Contacts User Guide Overview

In order for Loan Quality Connect to successfully send systemic email correspondence on loan file documentation requests, repurchase demands, data validation and/or self-reports, contact data must be submitted and maintained using these guidelines:

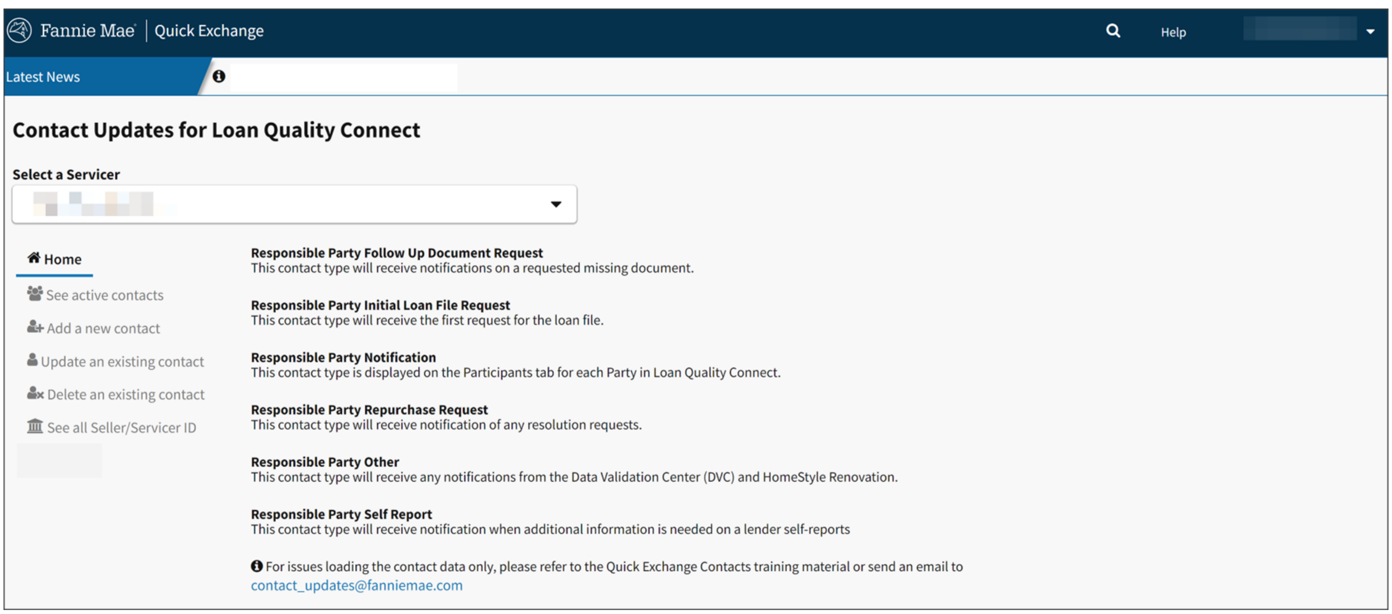
Contents

Accessing Contact Updates for Loan Quality Connect

1. Access Quick Exchange.
2. Click **Manage Contacts**.



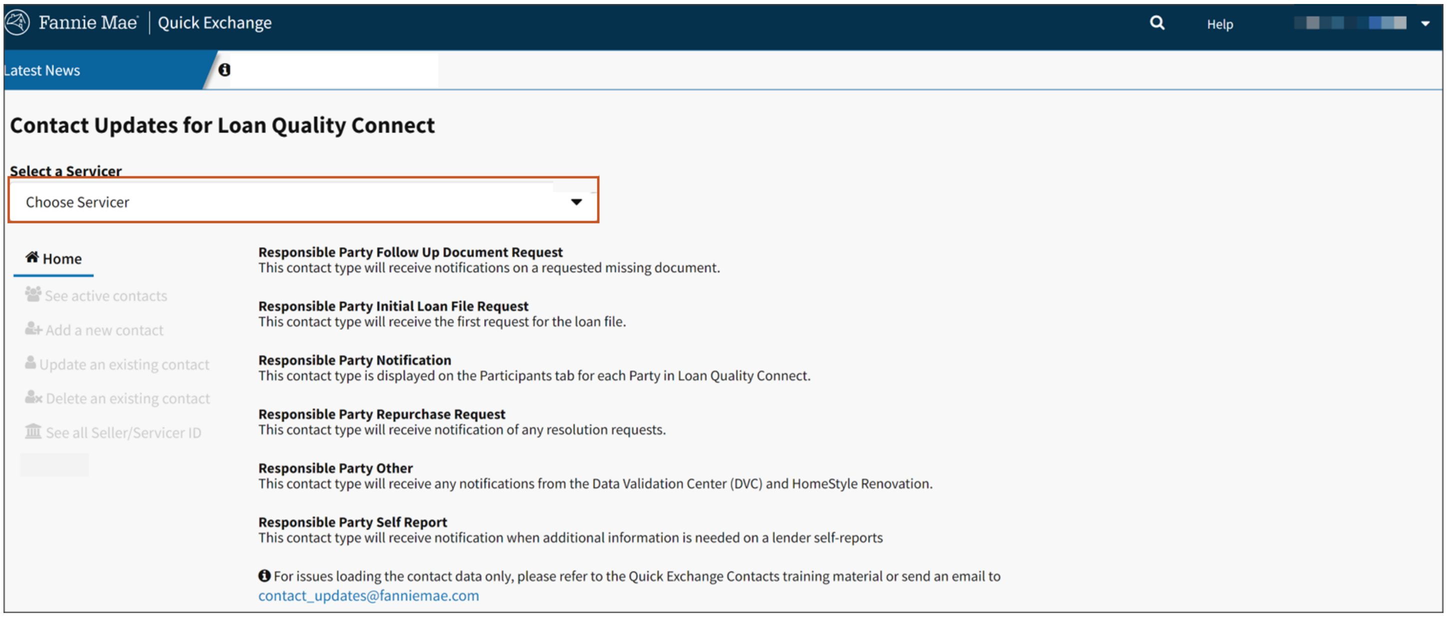
Result: The Contact Updates for Loan Quality Connect screen appears.



NOTE: *Each 9-digit Servicer number is required to have at least **one** contact list for **each** contact date type listed.*

Existing List of Active Contacts

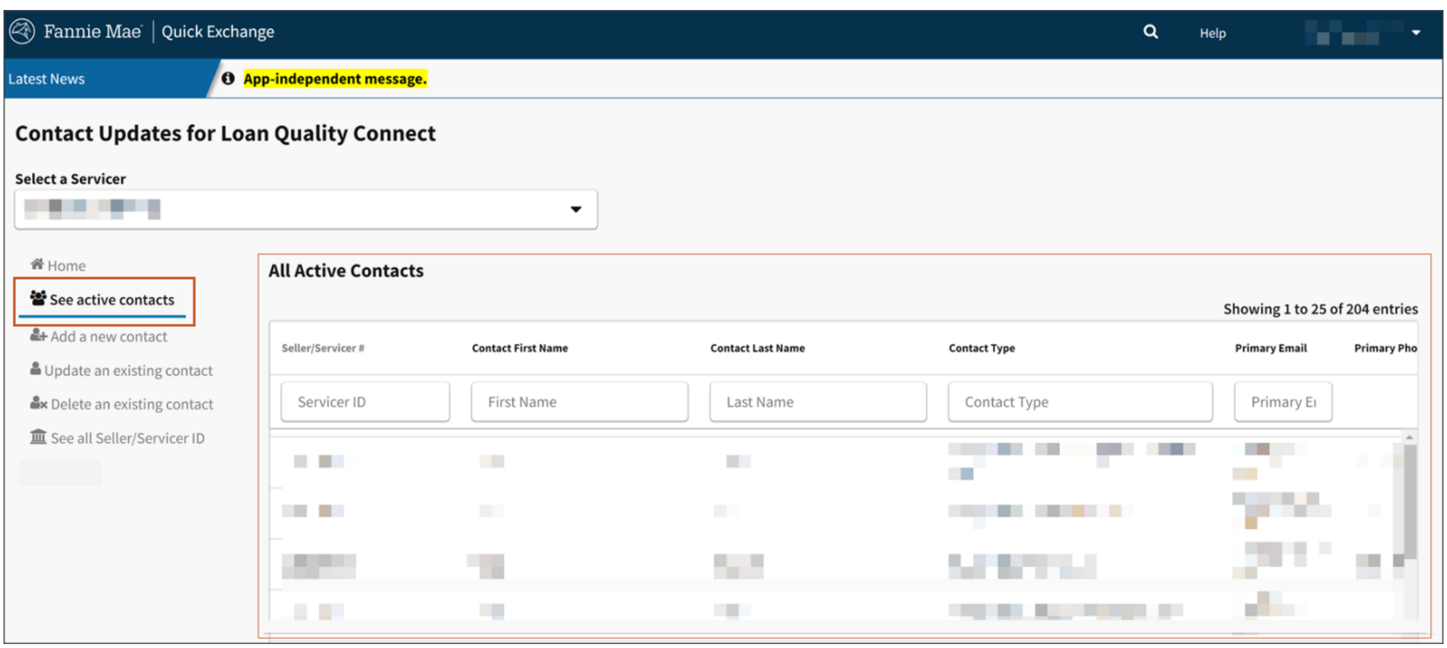
Select your **Servicer Name** from the Select a Servicer field.



> **NOTE:** *If your Fannie Mae credentials provide access to multiple servicers, select your Servicer Name before proceeding.*

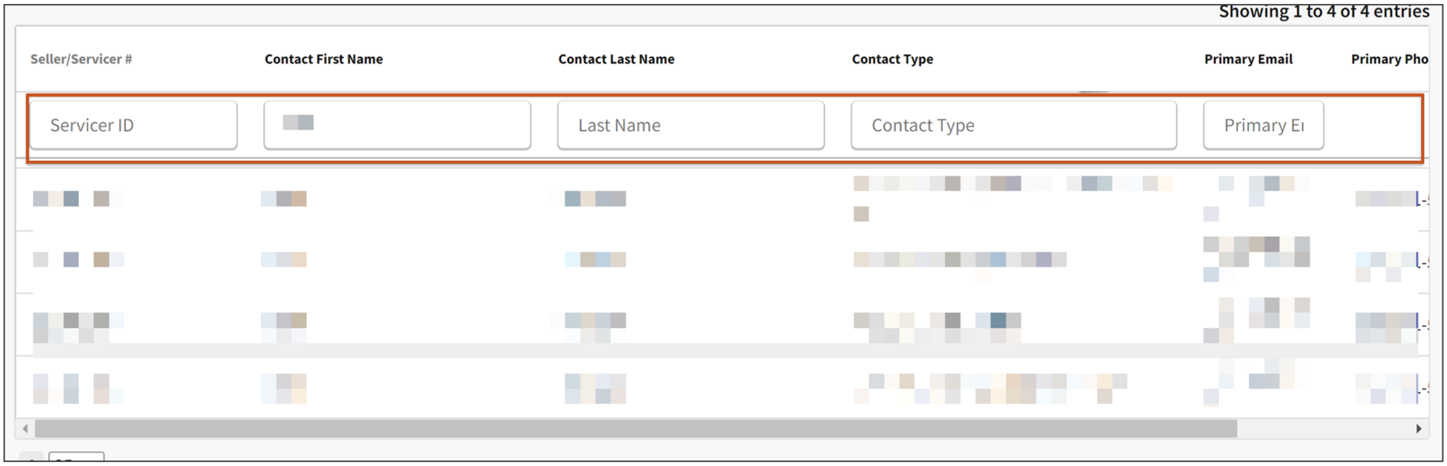
Active Contacts

Click **See active contacts** to view a list of all active contacts.



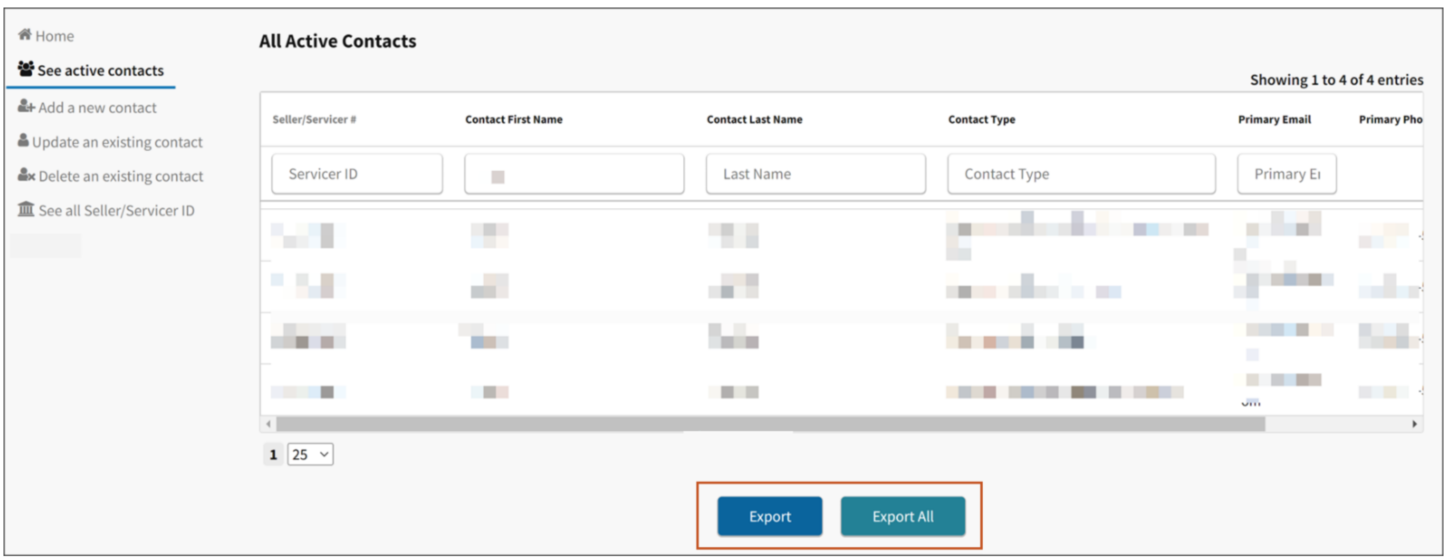
Filter Contact Data

Use the filters either individually or in multiples to filter data as desired.



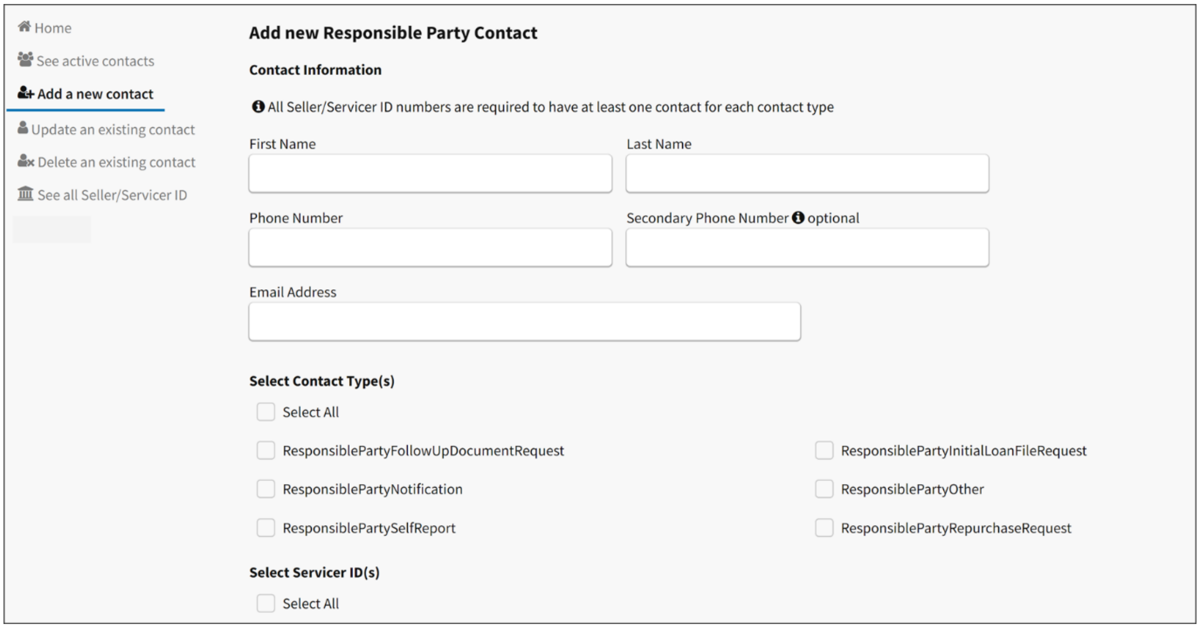
Export Contact Data

Click **Export** to export the filtered data to a downloadable version to a .csv format.
Click **Export All** to export the complete contact data set to a downloadable version to a .csv format.



Add a New Contact

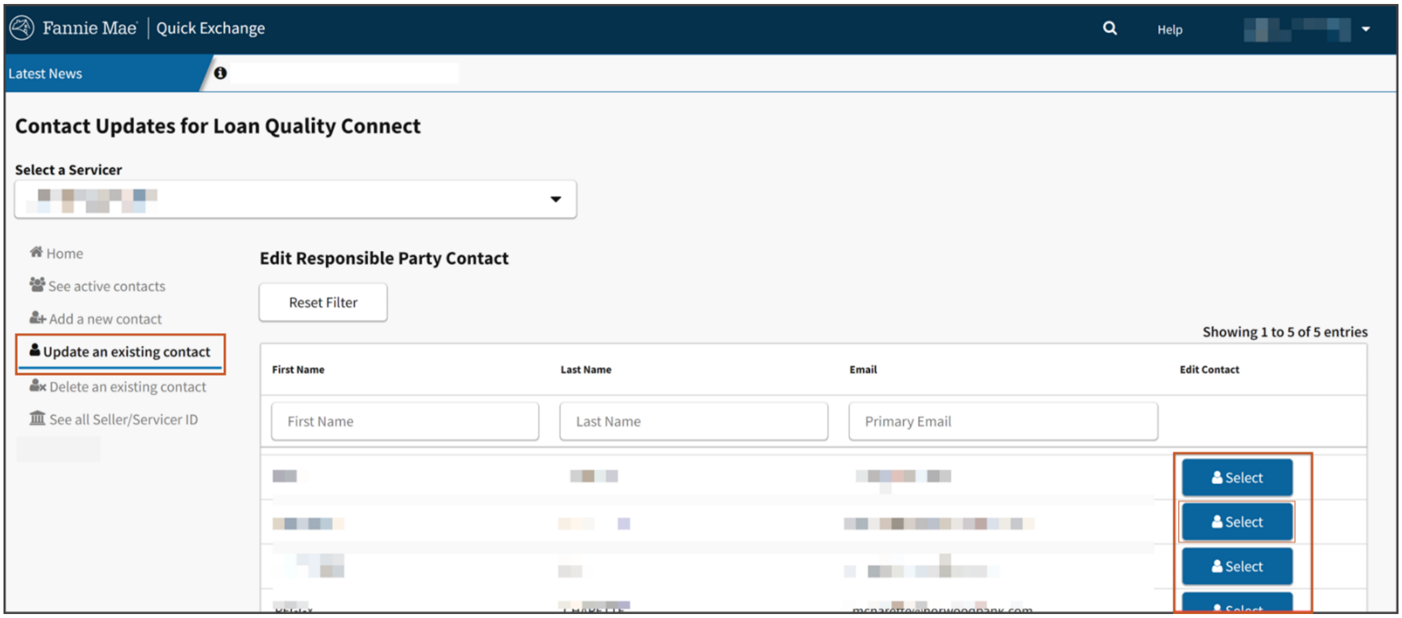
1. Click **Add a new contact**.
2. Enter information in **all applicable fields**.



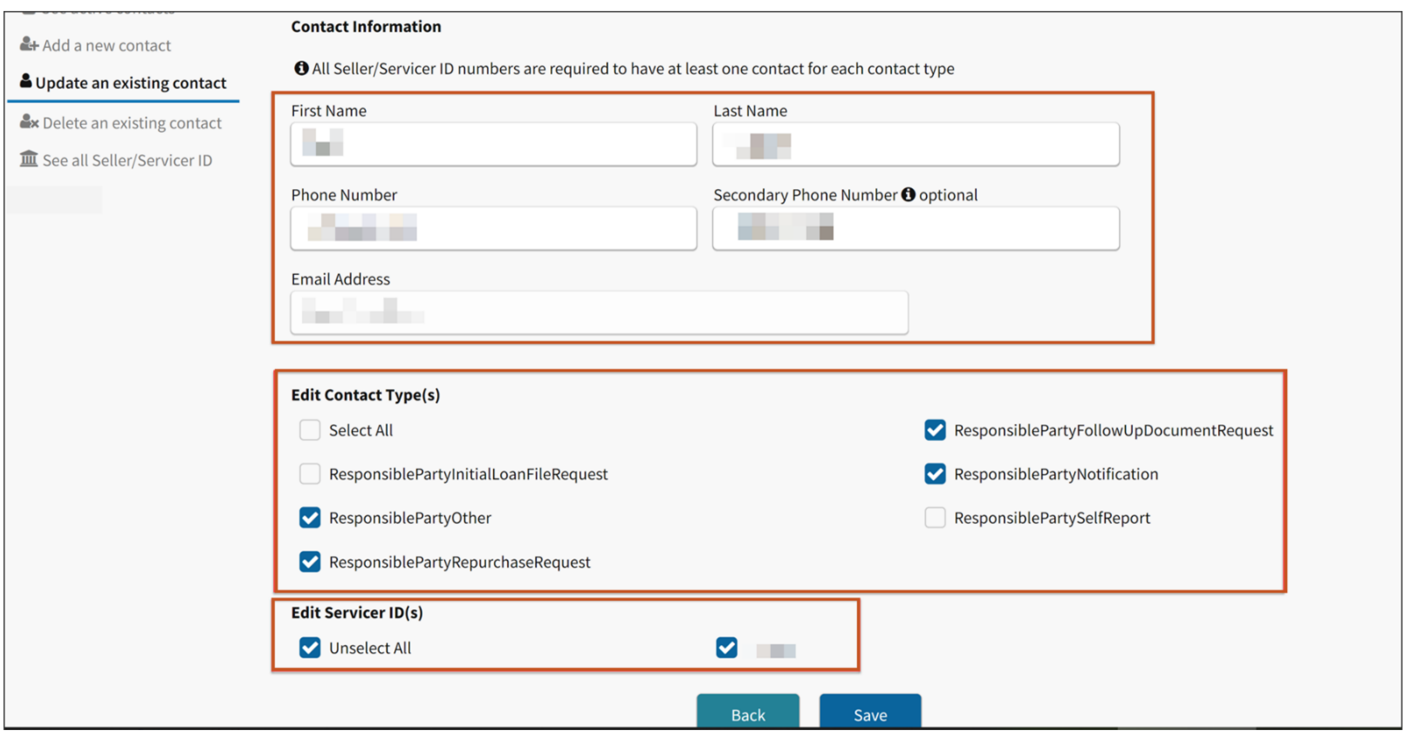
> **NOTE:** *No web-bases email addresses are allowed (i.e., gmail.com, yahoo.com, etc.) Each point of contact is required to be added individually, enter full name, and avoid adding only initials. Group mailboxes are allowed, to add please enter the First & Last Name in compliance with the mailbox's name as this is a requirement for the system. Once the contact has been added, the corresponding contact will be added live in Quick Exchange, however it will take 24-48 business hours to complete the add cycle on all other applicable Fannie Mae systems.*

Update an Existing Contact

1. Click **Update an existing contact**.
2. Click **Select** to the right of the desired contact to update.



3. Update appropriate fields and select/deselect **all** applicable check boxes.



4. Click **Save**.

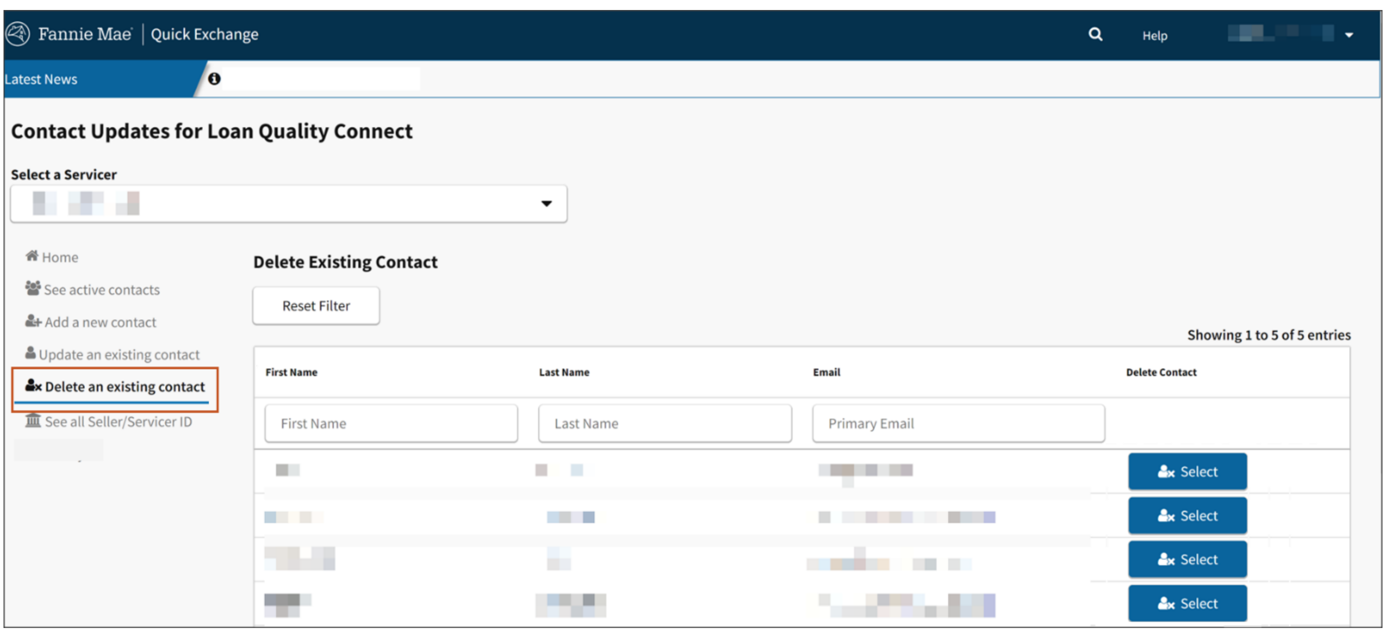
5. Click **Save** in confirmation pop-up box.

> **NOTE:** *One you click **Save** the corresponding contact will be updated live in Quick Exchange, however it will take 24 – 48 business hours to complete the update cycle on all other applicable Fannie Mae systems.*
>
> **NOTE:** ***Important!** If a contact needs to be deleted (i.e., no longer with the company) use the following **Delete an existing contact option** only.*

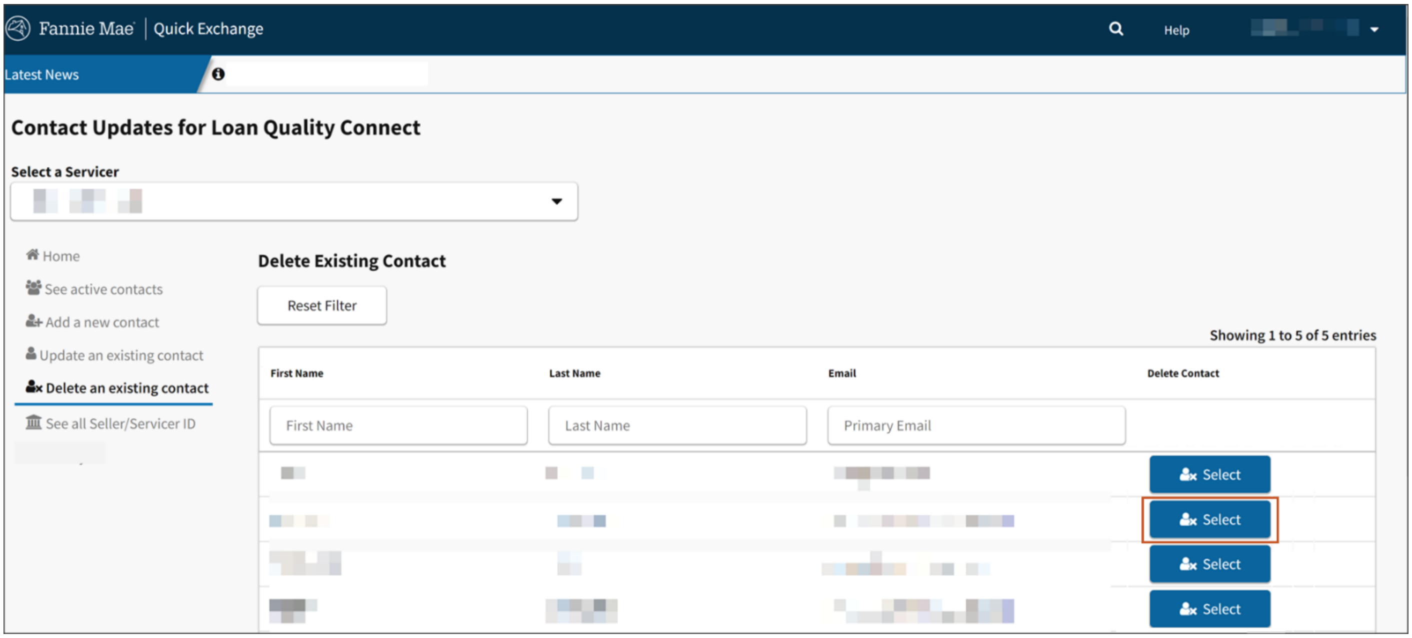
Delete an Existing Contact

If a contact needs to be deleted (i.e., no longer with the company) use the following steps.

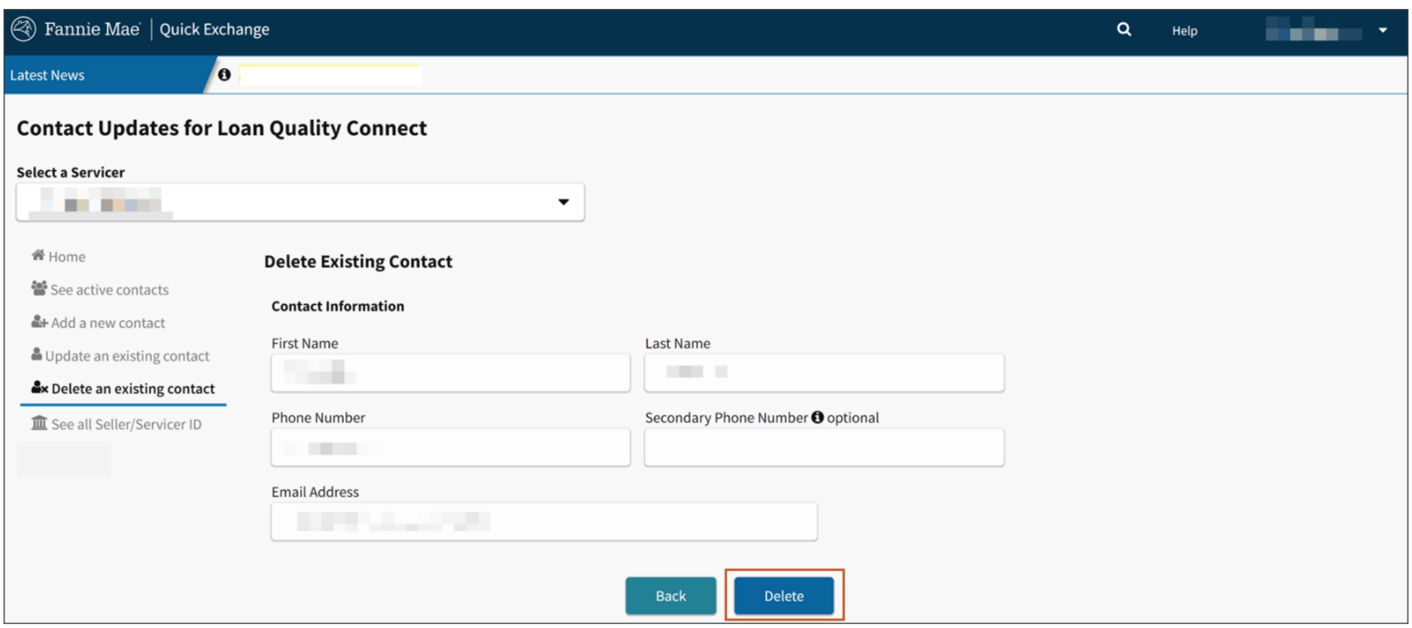
1. Click **Delete and existing contact** from the left menu.



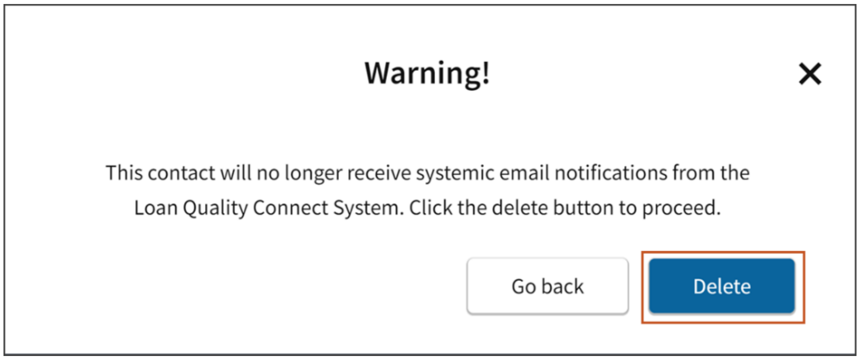
2. Select the **Contact** that needs to be deleted.



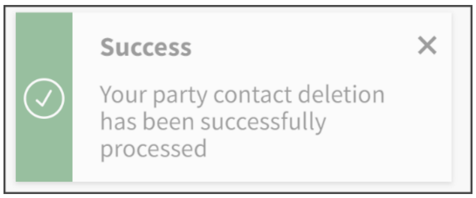
3. Validate the contact is correct, click **Delete**.



4. Validate that the contact to be deleted is correct, click **Delete**.



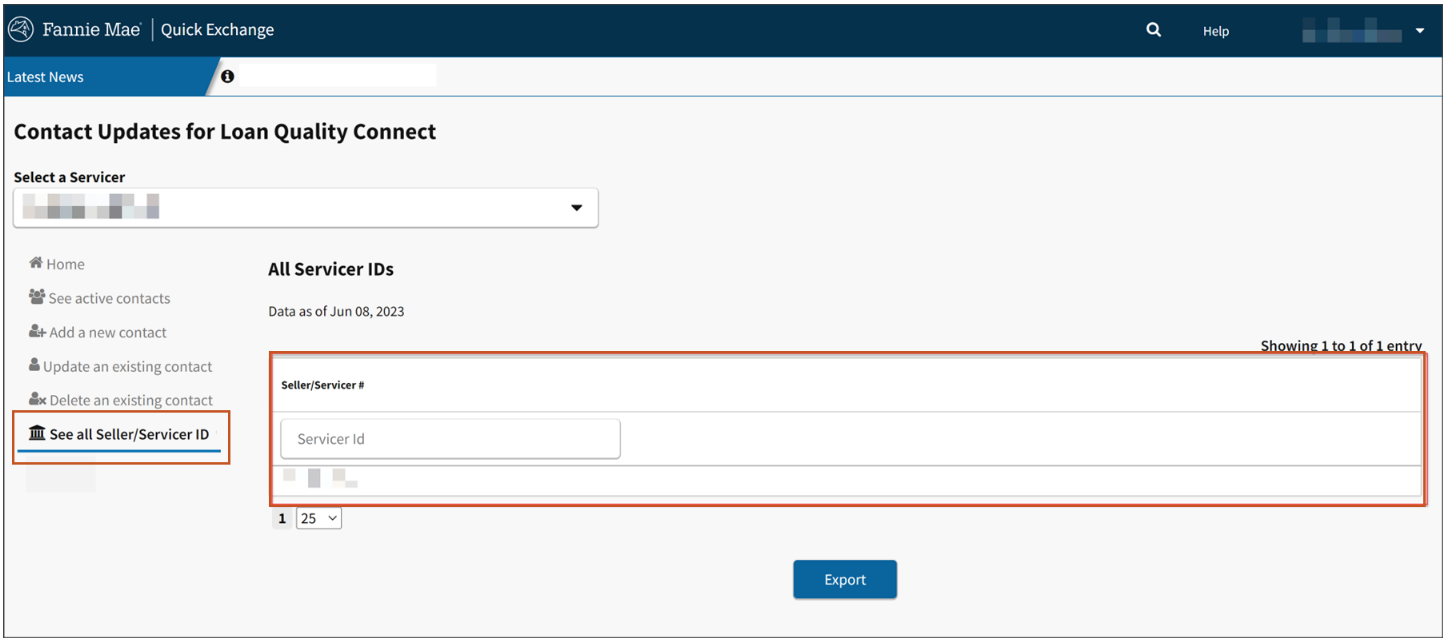
NOTE: *The following deletion confirmation pop-up box will appear confirming the deletion.*



NOTE: *Once you click **Delete** the corresponding contact will be deleted live in Quick Exchange, however it will take 24 – 48 business hours to complete the deletion cycle on all other applicable Fannie Mae systems.*

See all Seller/Servicer Identification Numbers

Click **See all Seller/Servicer ID** on the left menu.



> **NOTE:** *This will display all the Seller/Servicer ID numbers that can be accessed based on your Fannie Mae credentials.*
>
> **NOTE:** *To export the entire list of Seller/Servicer ID number, click **Export** and the downloadable list will be downloaded in .csv format.*

*For questions and/or issues regarding access to Quick Exchange and for additional information in regard to managing contact data for the Loan Quality Connect System (LQCS), please dial the **1-800-FannieMae2** number.*