

# Qualia Connect Guide for Real Estate Professionals



# Getting Started with Qualia Connect

Welcome to your digital closing experience. We're excited to introduce you to Qualia Connect.

If you have not already, you will soon receive an email from your title company inviting you to Qualia Connect, the secure platform that modernizes the closing experience. To set up your Qualia Connect account, click the "Access Your Closing" link and create a password.

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		<b>▼</b> Qualia				
	1	2				
		Access Your Closing				
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	Get updates on the     Securely send mes     Securely share doc     information.     Get quotes and pic     If you have any quest     through Qualia. I look	e status of your closing. sages to us and other parties. suments and provide critical closing acce tible requests. toros, please send me a secure message t forward to working with you.				
	Regards, User Name					
	Order Number	BN-CO-42463				
	Closing Type	Purchase				
	Closing Property	222 Main Street, Louisville, CO				

#### Why use Qualia Connect?

With Qualia Connect, you'll have access to:

- Real-time tracking of your closings via web or mobile app •
- Secure and electronic information exchange
- Secure messaging, eSigning, and document storage
- Instant quoting and ordering
- Configurable notification preferences and 2FA security

#### Security

Qualia Connect is a cloud-based portal where you can securely send and receive messages, store documents, and get status updates on your closings. When sharing sensitive information, you can be assured that it is stored safely. Qualia is always adding new security features, keeping all data protected by making it more difficult for attackers to access information related to a closing.

# Efficiency

With Qualia Connect, all parties will be updated in real time. You and your clients will be able to securely communicate, share information, and documents for the closing. You can even get quotes and place orders directly within Connect - saving you valuable time.

### A Better Client Experience

In today's tech-forward world, buyers and sellers will welcome the modern closing experience. The best way to continue to drive business is to ensure that your clients have a great experience – one that they'll want to share with family, friends, and colleagues.

Using Qualia Connect, your buyers and sellers will have full insight into every step of their closing. The mobile-friendly portal allows users to complete information requests, getting updates from anywhere at any time, and eliminating the need for back-and-forth phone calls on progress updates.

#### **Your Closing Portal**

When you first log in, you and your clients will see a screen like the one below. This will outline:

- The order number
- The property address
- An overview of the closing with a progress bar showing the current step
- A summary outlining all the pertinent information on the file
- All parties associated with the closing, including names and roles

If you have more than one closing in Qualia Connect, you will be able to access all your closings on the Homepage. You can access the Homepage by clicking the Qualia logo in the upper lefthand corner.

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	Orde	Purchase or #ENI-CO-62463			
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# **Basic Settings**

To customize your settings, click on your name in the upper righthand corner, then scroll down to adjust.

Here, you can:

- Adjust your name
- Add or change your phone numbers
- Upload your headshot and/or logo
- This can pull onto any quotes you request, alongside the title company's logo
- Adjust your notifications
- Choose your preferred settlement agency
- Adjust Two-Factor Authentication (2FA) preferences
- We recommend using an Authenticator App, such as Authy or Google Authenticator, for improved security
- · Enable email previews



#### Notifications

Customize your notification preferences to indicate which email notifications you want to receive from Qualia Connect. If you do not want to receive emails on a particular update, simply click "Edit" to the right of notifications and change the setting for that update from "Email & App" to either "App Only" or "None."

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INFORMATION REQUESTED RECEIVED You receive an information request.	🖂 Email & App		
DOCUMENT SHARED You get a document from someone.	D. In App Only		
CONVERSATION OR DOCUMENT DELETED	3. In App Only		
A conveniation, message, or document is deleted.			
Email Preview			

#### **Message Previews**

By default, Qualia Connect will not surface the text of your secure messages within the email notification that you receive. To maximize security, you will be asked to log into Connect to view the message.

However, if you would prefer to see the text of your messages included in the email notification, simply enable inbound message previews.



#### **Progress Updates**

It's important for you to know what's happening on your closings in real time so you can keep your clients in the loop. With Qualia Connect, progress updates will automatically be sent to you via email when certain milestones are completed. These milestones are triggered by actions completed by the title company.

The milestones and Connect triggers are as follows:

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CPL Issued	×				Funds Disbu	rsed	×
					Title Insuran	ce issued	×

#### Messages

As part of the closing process, you will be able to communicate with the title company directly through the secure messaging available in Qualia Connect. When the title company sends you a message, you will receive the email notification shown above.

Log into Qualia Connect to read and reply. Your entire message history will be listed in the "Inbox" tab. To be able to read the text of your messages within your email notifications, enable message previews in your settings.



#### **Documents**

Any documents that you send or receive throughout your communication will be stored in this tab. These documents will be available in perpetuity. You can also send documents from this tab by clicking on "Share Files."



## Get Quotes and Place Orders

Through Qualia Connect, you can easily obtain quotes and place new orders directly through your portal. First, click on the "Qualia" logo in the upper lefthand corner to view the Homepage. Under the "Get Quote" button, choose one of three options:

- Closing Disclosure
- Seller Net Sheet
- Title Fees Only

Fill out the requested information to receive a quote instantly.



Print, email, or save a PDF copy of your quote for later reference.

After generating your quote, you can place an order directly by clicking the green "Order" button. You can also begin the order process without a quote by clicking "Place Order" on the Homepage. Either option will seamlessly and securely send the order to your title company / settlement agency.

When you submit an order, the title company / settlement agency will be notified. Once they accept the new order, you will be able to track its progress in Qualia Connect.

<ul> <li>Add Property</li> </ul>	<ul> <li>Select Provider</li> </ul>	<ul> <li>Final</li> </ul>	alize Details	Review Quote
Did Not Shop For	Borrower	Seller	Overte f	rom Business Name
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8.				-

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888 Main Street		×			0
CITY.	COUNTY.	STATE .		ZIPCODE *	
Louisville	Boulder	со	×	80027	
BASIC INFO					
SETTLEMENT AGENCY*					
Select one					
REALTOR *		ROLE			
Agent Name		<ul> <li>Select one</li> </ul>			-
DETAILS Optional					
PURCHASE PRICE	LOAN AMOUNT	LOAN NUMBER		FEATURES	
\$400,000.00	\$400,000.00			None	-
FILES Optional					
Upload F	ile				

#### Tasks

You may receive a few tasks asking you to provide required information to the title company in preparation for closing. Some tasks go directly to the buyer and seller, but upon request, an agent can fill out these requests on their behalf. Key tasks for real estate agents are outlined below:



# **Confirm Transaction Information**

Tasks > Confirm Your Transaction Information	0 of 5 tasks complete			
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# **Confirm Real Estate Agent's Information**

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Real Estate Agent			Your settlement agency will use this information to disburse your commission and prepare documents for settlement.
WORK PHONE	CELL PHONE	Aux	If you have any questions please contact User Name at Business Name.
Selling Brokerage In	formation		SEND MESSAGE
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# **Authorize Payoffs**

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	0 of 2 sections completed What's Missing? 0	
		About This Form
have added 1 mortgage. Please enter informa First Mortgage	ation for each mortgage below.	Your settlement agency will use this information to start the mortgage payoff process.
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You must fill in all required information above	before you can submit this form.	SEND MESSAGE
Submit		



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