



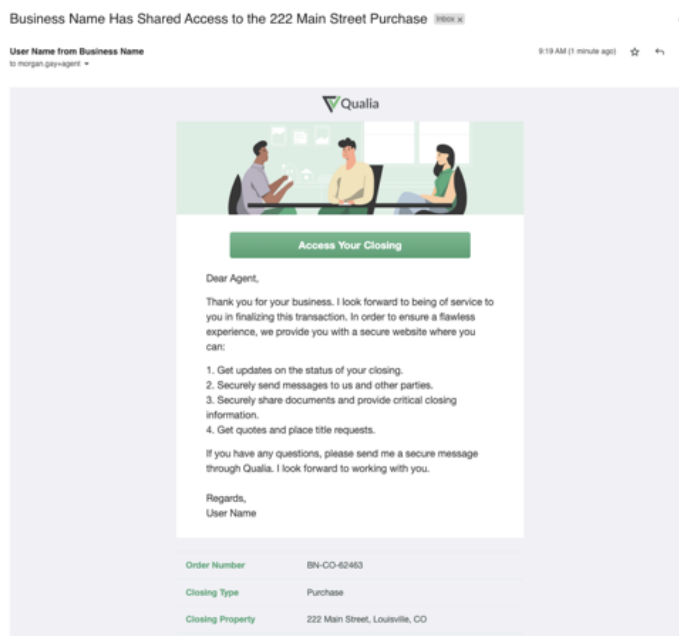
Qualia Connect Guide for Real Estate Professionals



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.



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.

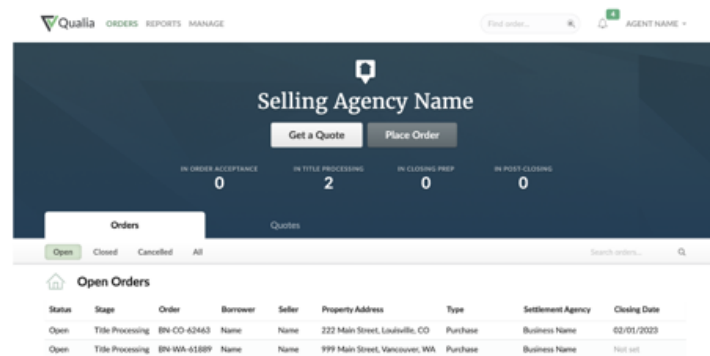
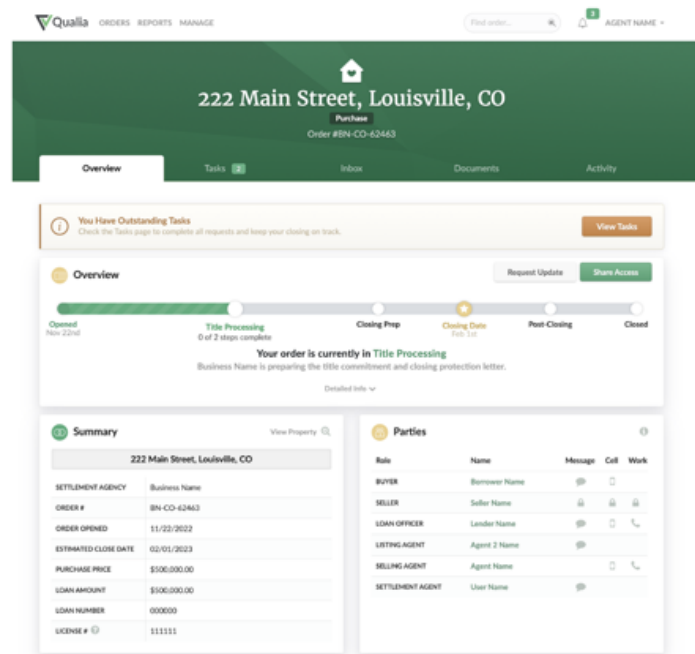
Using Qualia Connect, your buyers and sellers will have full insight into every step of their closing. The mobile-friendly portal allows users to complete information requests, getting updates from anywhere at any time, and eliminating the need for back-and-forth phone calls on progress updates.

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.

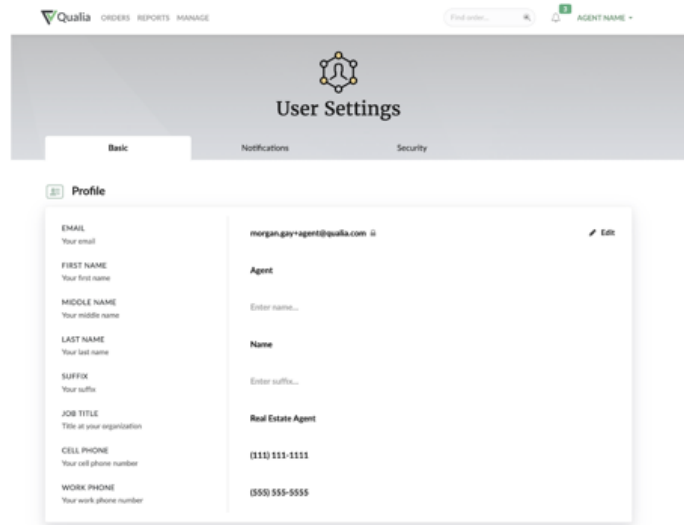


Basic Settings

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

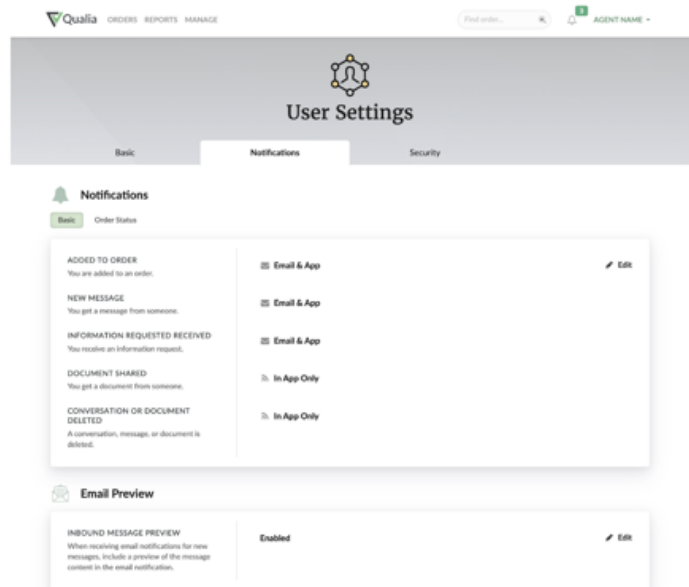
Here, you can:

- 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

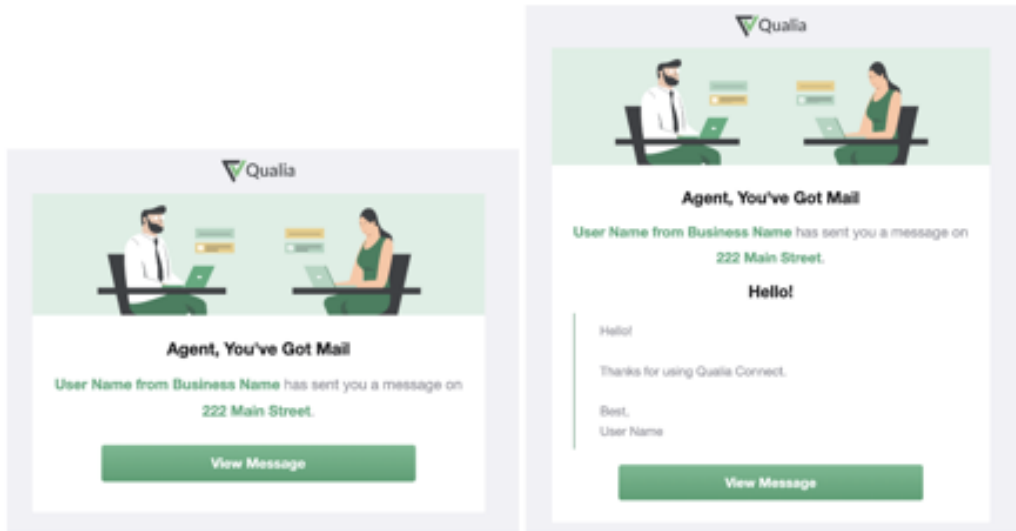
Customize your notification preferences to indicate which email notifications you want to receive from Qualia Connect. If you do not want to receive emails on a particular update, simply click "Edit" to the right of notifications and change the setting for that update from "Email & App" to either "App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



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.

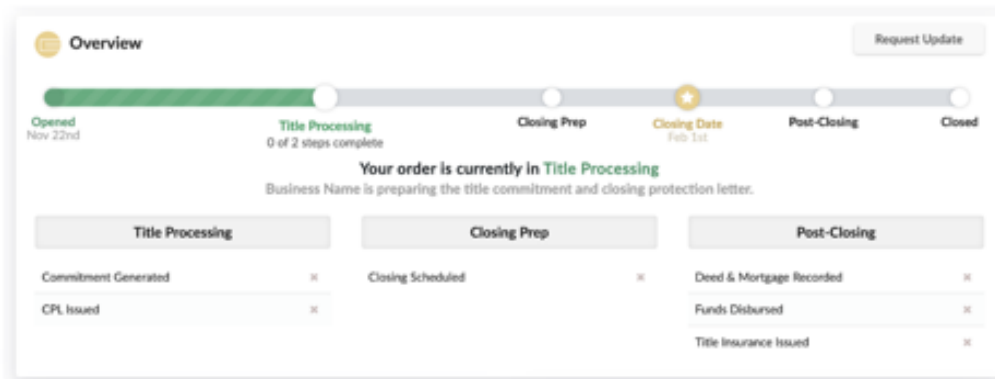
However, if you would prefer to see the text of your messages included in the email notification, simply enable inbound message previews.



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.

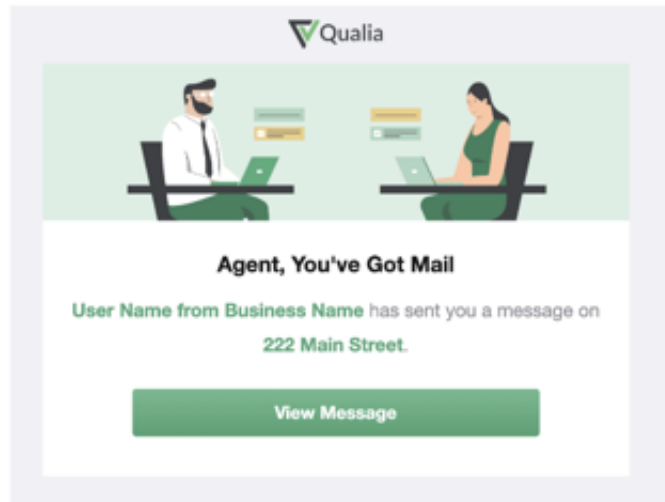
The milestones and Connect triggers are as follows:



Messages

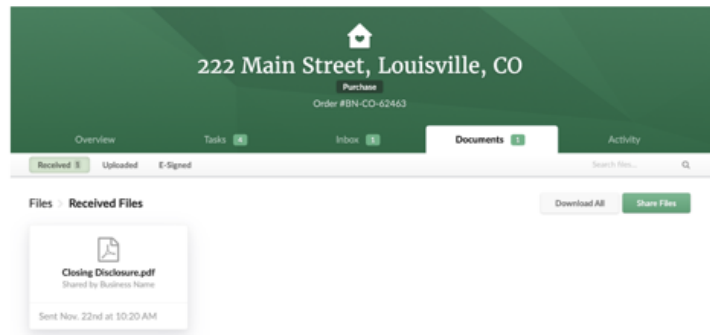
As part of the closing process, you will be able to communicate with the title company directly through the secure messaging available in Qualia Connect. When the title company sends you a message, you will receive the email notification shown above.

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."

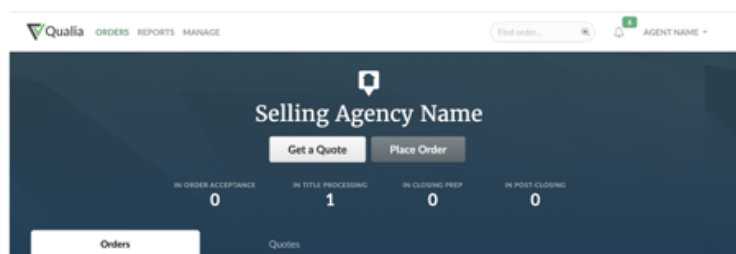


Get Quotes and Place Orders

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.

	Borrower	Seller
D Did Not Shop For		
No Fees		
C Did Shop For		
Lender Policy	\$1,360.00	\$0.00
E Taxes and Fees		
Mortgage / Deed of Trust Recording Fee	\$125.00	\$0.00
Deed Recording Fee	\$25.00	\$0.00
Documentary Transfer Tax (State Deed)	\$40.00	\$0.00
H Other Charges		
Owner Policy	\$313.00	\$0.00

ADDRESS: 888 Main Street, APT, SUITE, ETC. [X]

CITY: Louisville, COUNTY: Boulder, STATE: CO, ZIPCODE: 80027

SETTLEMENT AGENCY: Select one...

REALTOR: Agent Name, ROLE: Select one...

DETAILS: PURCHASE PRICE: \$400,000.00, LOAN AMOUNT: \$400,000.00, LOAN NUMBER, FEATURES: None

FILES: Upload File

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:

Qualia ORDERS REPORTS MANAGE

222 Main Street, Louisville, CO

Purchase

Order #BN-CO-62463

Tasks 0 of 3 tasks complete

- Confirm Home Warranty Information
- Confirm Homeowner or Condominium Association Information
- Confirm Your Commission Information

Confirm Transaction Information

Tasks > Confirm Your Transaction Information 0 of 5 tasks complete

5 of 7 sections completed for Transaction Info Request. What's Missing? ⓘ

- ✓ Closing Details**

ESTIMATED CLOSING DATE: 02/01/2023

PURCHASE PRICE: \$500,000.00
- ✗ Listing Commission**

COMMISSION PAID BY: Buyer Seller Split

COMMISSION RATE: \$500,000.00 * COMMISSION IN: + FLAT COMMISSION COMPONENT: = TOTAL COMMISSION: \$0.00
- Additional Listing Fees and Credits**

No Fees or Credits Added

[Add Fee or Credit](#)
- ✗ Selling Commission**

COMMISSION PAID BY: Buyer Seller Split

COMMISSION RATE: \$500,000.00 * COMMISSION IN: + FLAT COMMISSION COMPONENT: = TOTAL COMMISSION: \$0.00
- Additional Selling Fees and Credits**

No Fees or Credits Added

[Add Fee or Credit](#)

Listing Team Members

Add any other team members that should have access to (or receive commission for) this order in Connect.

- Agent 2 Name**

FIRST NAME*: Agent 2

LAST NAME*: Name

JOB TITLE*: Real Estate Agent

EMAIL*: morgan.gay-agent2@qualia.com

BROKERAGE NAME*: Listing Agency Name

[Add Additional Person](#)
- Selling Team Members**

Add any other team members that should have access to (or receive commission for) this order in Connect.

- Agent Name**

FIRST NAME*: Agent

LAST NAME*: Name

JOB TITLE*: Real Estate Agent

EMAIL*: morgan.gay-agent@qualia.com

BROKERAGE NAME*: Selling Agency Name

[Add Additional Person](#)

About This Form

Your settlement agency will use this information to disburse your commission and prepare documents for settlement.

If you have any questions please contact **User Name** at Business Name.

[SEND MESSAGE](#)

Confirm Real Estate Agent's Information

Tasks > Confirm Agent Information 0 of 5 tasks complete

1 of 2 sections completed for Agent Information Request. What's Missing? ⓘ

- ✓ Agent Information**

FIRST NAME*: Agent

LAST NAME*: Name

JOB TITLE*: Real Estate Agent

WORK PHONE:

CELL PHONE:

FAX:
- ✗ Selling Brokerage Information**

Is Selling Agency Name at 888 13th Street, Boulder, CO the selling brokerage for 222 Main Street, Louisville, CO?

About This Form

Your settlement agency will use this information to disburse your commission and prepare documents for settlement.

If you have any questions please contact **User Name** at Business Name.

[SEND MESSAGE](#)

Authorize Payoffs

Tasks > Confirm Outstanding Mortgage Information

You are receiving this form in place of your client. Please fill it out on their behalf, or contact your settlement agent if you would prefer your client to receive this form.

0 of 2 sections completed What's Missing? ⓘ

You have added 1 mortgage. Please enter information for each mortgage below.

X First Mortgage Remove

LENDER NAME * LENDER PHONE # *

USAN # * PRIMARY BORROWER'S SSN ⓘ *

IS THIS A LINE OF CREDIT OR HELOC? *

Yes No

X Additional Mortgages

Do You Have An Additional Mortgage?

Yes No

0 of 4 tasks complete

About This Form

Your settlement agency will use this information to start the mortgage payoff process.

If you have any questions please contact **User Name** at Business Name.

[SEND MESSAGE](#)

Confirm HOA Information

Tasks > Confirm Homeowner or Condominium Association Information

0 of 1 sections completed What's Missing? ⓘ

You have added 1 homeowner/condo association. Please enter information for each association below. Add Additional HOA

X First Association Remove

ASSOCIATION NAME * TYPE *

CONTACT FIRST NAME * CONTACT LAST NAME * CONTACT EMAIL * CONTACT PHONE

INSTALLMENT AMOUNT PAYMENT SCHEDULE LAST PAYMENT DATE NEXT DUE

0 of 5 tasks complete

About This Form

Enter the requested information about the property's homeowner or condominium association, or confirm that the property does not have one.

If you have any questions please contact **User Name** at Business Name.

[SEND MESSAGE](#)

Confirm Home Warranty Information

Tasks > Confirm Home Warranty Information

0 of 1 sections completed What's Missing? ⓘ

X Home Warranty Remove

COMPANY NAME *

PRICE * PAID BY *

Submit information

You must fill in all required information above before you can submit this form.

[Submit](#)

0 of 5 tasks complete

About This Form

Enter the requested information for a home warranty, or confirm that there will not be one.

If you have any questions please contact **User Name** at Business Name.

[SEND MESSAGE](#)

