



## Service Orders – Process in Qualia

Learn how to order an AgentNet Search Product® (ASP)\*, and import searches and commitments from Qualia, using the AgentNet® Integration. View Title and supporting documents returned with your Service Order. Generate, scan, and upload documents to your file.

*\*The AgentNet Search Product is only available in select areas. Contact your local First American representative for more information on the product's availability.*

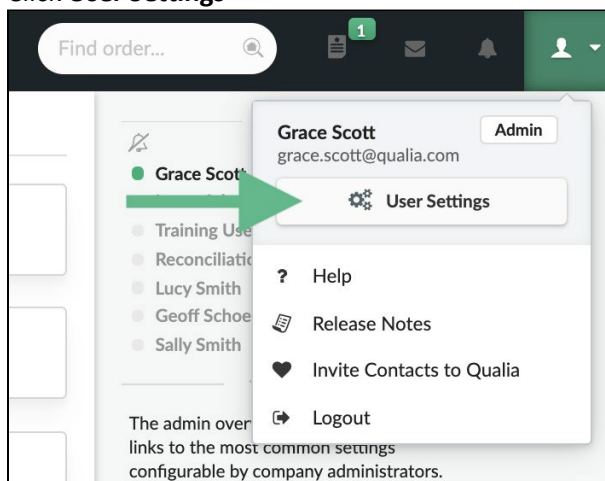
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## Add Underwriter Credentials

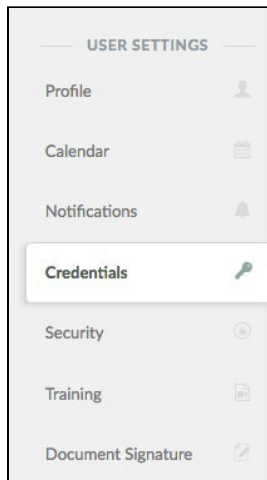
To enter credentials at the user level:

1. Click the head and shoulders icon in the top right corner
2. Click **User Settings**





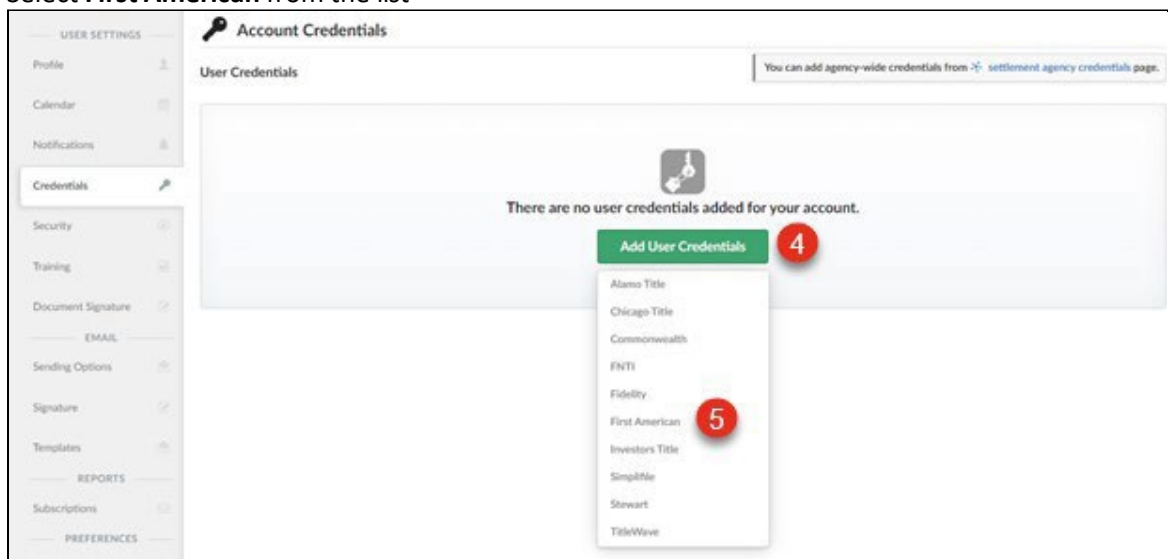
3. Click **Credentials > Add Credentials**



**NOTE:** This will add user level credentials, if required.

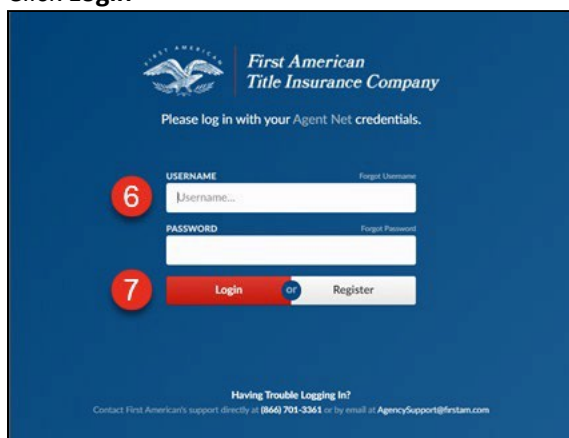
4. Click **Add User Credentials**

5. Select **First American** from the list



6. Enter your personal AgentNet credentials

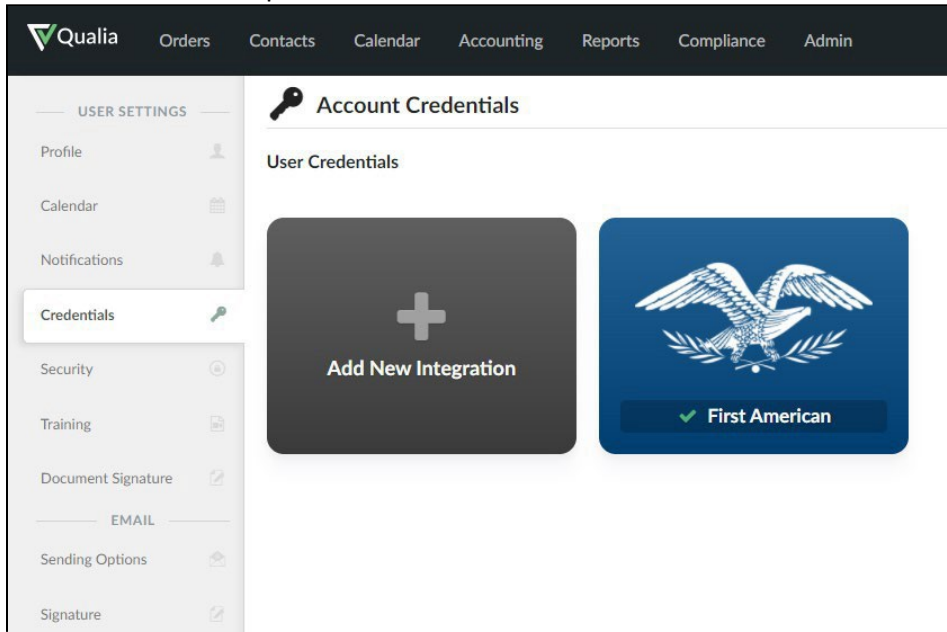
7. Click **Login**



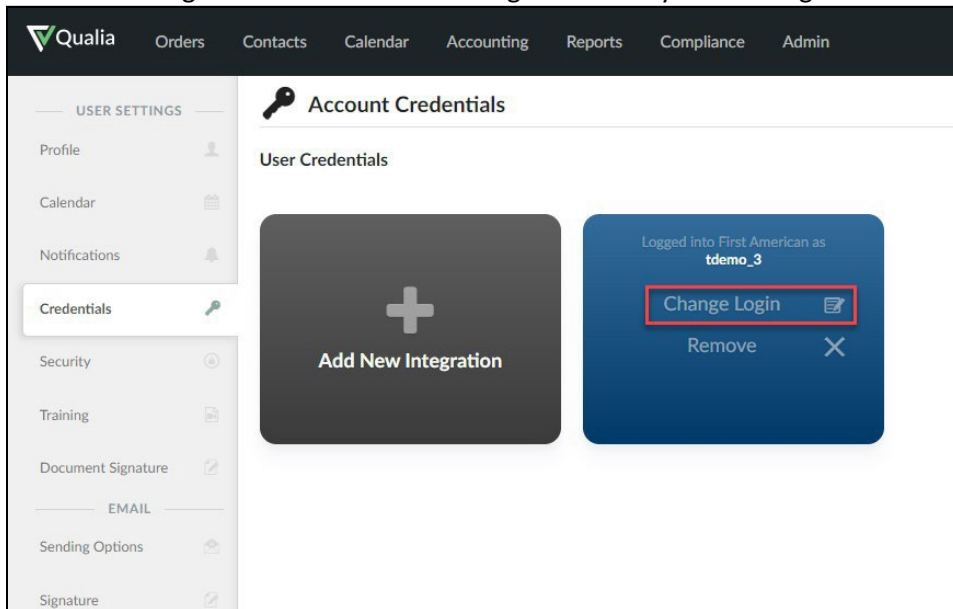
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First American is set up in the **Credentials** menu:



**NOTE:** Hovering over the First American logo will allow you to change or remove these credentials from your account.

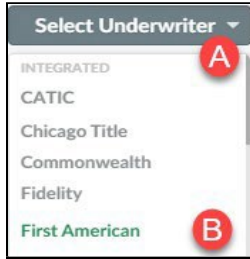




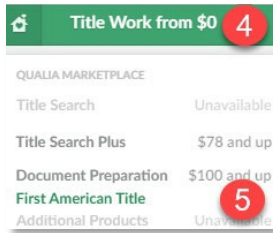
## Place a Service Order from the Commitment Screen

Beginning from an existing Qualia file:

1. In the **ORDER** menu, click **Title**
2. Select **Commitment**
3. In the **Commitment** screen:
  - A. Click **Select Underwriter**
  - B. Select **First American** from the **INTEGRATED** underwriter drop-down options
4. In the **MARKETPLACE** area, click **Title Work from \$0**
5. Select **First American Title**



- C. Select the appropriate **AGENT ID**
6. In the **Add Vendor Requested Data Title** window select Required Fields:  
**TRANSACTION TYPE, BUSINESS SEGMENT, PRODUCT, PROPERTY TYPE, NOTIFICATION EMAIL**



Required Fields	
<b>TRANSACTION TYPE</b>	<b>BUSINESS SEGMENT</b>
Sale w/Mortgage	Residential
<b>PRODUCT</b>	<b>PROPERTY TYPE</b>
AgentNet Search Product	Single Family Residence
<b>NOTIFICATION EMAIL</b>	
spleblanc@firstam.com; sevans-scott@firstam.com	

**NOTE:** To add multiple email addresses, enter a semi-colon, separated with no space, after each address.

7. Read **Disclaimer**
8. Click **Confirm & Preview Order**
9. In the **Confirm Order** window:
  - A. Verify Order information
  - B. Click **Upload New File** to add supporting document(s), if applicable

- C. Add **Note to Vendor**, if needed  
**NOTE:** Additional land parcels can be added to the search order by including the details in the **Note to Vendor** section prior to submitting your order to AgentNet.

**Place Your Order**

- D. Click **Place Your Order**  
**NOTE:** A window is opened displaying the First American Order # Status and Messages.

10. In the **Commitment** screen, scroll left to confirm

Status: **In Progress**

### NOTES:

- Once the order is placed, an Order Confirmation is sent to the email address in your Order.
- The Marketplace subscribed user will receive an email and/or notification in Qualia.

## Import a Service Order from the Commitment Screen

1. In the **Commitment** screen, click **Review Title Order**  
**NOTE:** The **Order** window is opened with the **Review** screen displayed.

2. Review order details

3. Click **Add Data**  
**NOTE:** Syncing order data is displayed as data sent from First American next to the current data in Qualia.

4. In each displayed screen, click **Use** under the appropriate data option
5. Select applicable **Requirements** in the appropriate column

Keep Yours	Keep Vendor's
<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>

6. Click **Confirm**
7. Select applicable **Exceptions** in the appropriate column

Keep Yours	Keep Vendor's
<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input checked="" type="radio"/>



8. Click
9. In the **Order Data Added** window, select a rating
10. Click
11. Click
12. In the **ORDER** menu, click **Commitment**
13. In the **Commitment** screen, review information
14. Click to review requirements
15. Click , if needed
16. Click to review exceptions
17. Click , if needed

**NOTES:**

- To print a draft or preview the Commitment, click in **Schedule A** screen.
- To edit a **Requirement** or **Exception**, enter updated information in the appropriate requirement or exception field.

18. In the **ORDER** menu, click **Commitment**
19. In the **Commitment** screen, click
20. Click **Final** in the drop-down list

21. In the **Print** window, click

**NOTE:** The **STATUS** is displayed as Completed.

## Documents

Go to the Documents screen to access Title Documents and supporting search documents returned with your service order.

1. In the **ORDER** menu, click

2. Click the **Title Documents** folder

NAME	TYPE	MODIFIED
Title Documents		Mar 5th, 10:12 AM

**NOTE:** You can click for detailed document information, if applicable.

3. In the **Title Documents** screen, click the applicable **Service Order** folder

FAM-2019-102 Import 1

4. Click ☐ to select the preferred Title Document

**NOTES:**

- Documents are available in .pdf, .doc, and .xml formats.
- Once the document file is selected, file action options are displayed at the top of the screen.

1 file selected							
NAME	TYPE	MODIFIED					
Title Documents							
AgentNet Search Product 2016 - FL_SE5-555122.pdf - Mar 5th, 1:12 PM		Mar 5th, 10:12 AM	<input checked="" type="checkbox"/>				
AgentNet Search Product 2016 - FL_SE5-555122.doc - Mar 5th, 1:12 PM		Mar 5th, 10:12 AM	<input type="checkbox"/>				
AgentNet Search Product 2016 - FL_SE5-555122.xml - Mar 5th, 1:12 PM		Mar 5th, 10:12 AM	<input type="checkbox"/>				
AgentNet Search Product 2016 - FL_SE5-555122.esp3315 - Mar 5th, 1:12 PM		Mar 5th, 10:12 AM	<input type="checkbox"/>				

5. Click the **Title Document** hyperlink

**NOTES:**

- The document is opened on screen with additional viewing, edit, download, delivery and print options.
- You can click to select a **File Action** option for the selected **Title Document**, if preferred.

6. Click the applicable option to generate, scan or upload additional documents to your order

Generate	Scan	Upload




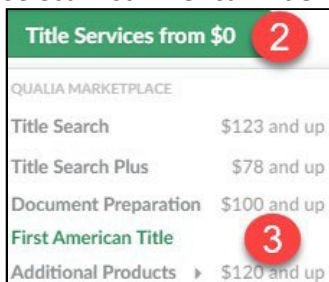
## Optional

### Place a Service Order from Marketplace

Title firms with more than one office must select a First American Agent ID in the **Title** section prior to placing a Service Order through the Marketplace Integration.

**NOTE:** To select a First American Agent ID follow, steps 1-3 in **Place a Service Order from Commitment Screen** section above.

1. In the **ORDER** menu, click 
2. In the **Marketplace** screen, click **Title Services from \$0**
3. Select **First American Title**





4. Follow steps 6-10 in **Place a Service Order from the Commitment screen** section above

**NOTES:**

- Once the order is placed, an Order Confirmation is sent to the email address in your Order.
- Multiple service orders will only be accessible in the Marketplace screen.

### Import a Service Order from Marketplace

Once you receive the completion email notification, follow the steps below to import the Commitment information and documents directly into Qualia.

1. In the **ORDER** menu, click 
2. In the **Title Services** section, **Status** column, click  Submitted

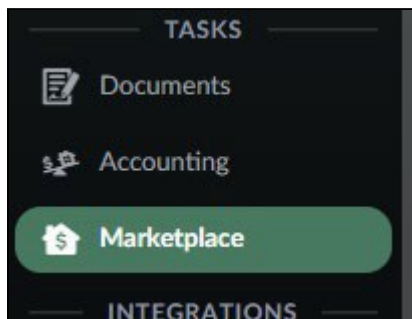
**NOTE:** The **Order** window is opened with the **Review** screen displayed.

3. Follow steps 2-21 in **Import a Service Order from the Commitment Screen** section above

### Update Order

When an Update, Date Down or Amendment is needed for an existing, completed AgentNet Search Product, follow these steps:

1. From the file, click **Marketplace**



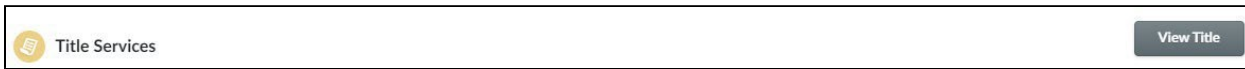




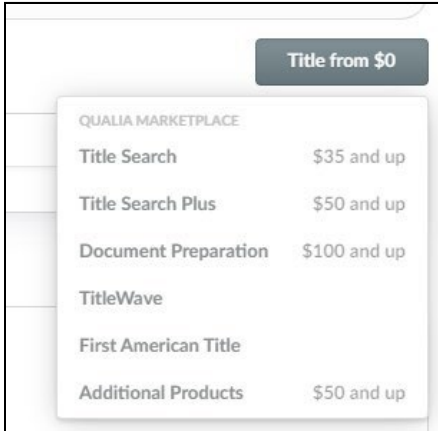
First American Title™



2. In the Title Services section, click **View Title**



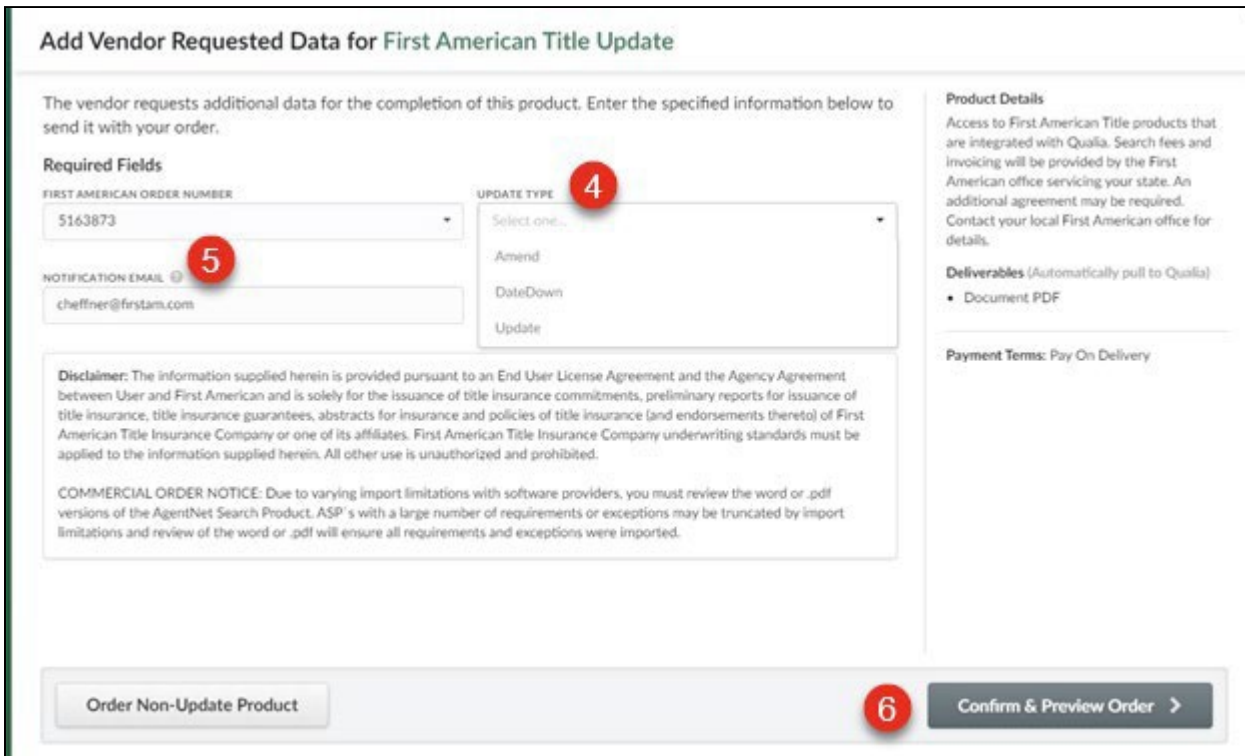
3. Select **First American Title**



4. Select **Update Type**

5. Update the **Notification Email**, if required

6. Click **Confirm & Preview Order**





7. On the **Confirm Order** screen, select a Point of Contact, Validate Information and Attach Documents or Add Notes (optional).
8. Click **Place Your Order**

**Confirm Order for First American Title Update from First American** [Go Back](#)

**Customize Your Order**

PREFERRED POINT OF CONTACT  
Christine Heffner 7

**Data Sent to Vendor**

BUYERS Brian Borrower	SELLERS Stanley Seller	LOAN AMOUNT \$100,000.00
ADDRESS 123 Main Street Tallahassee, 32301	COUNTY Leon	PARCEL IDS Not set

Attached Documents [+ Attach Order File](#) [Upload New File](#)

No files attached.

Note to Vendor (Optional)

Enter note...

**Product Details**  
Access to First American Title products that are integrated with Qualia. Search fees and invoicing will be provided by the First American office servicing your state. An additional agreement may be required. Contact your local First American office for details.

**Deliverables** (Automatically pull to Qualia)

- Document PDF

**Payment Terms:** Pay On Delivery

**Place Your Order** 8

9. Close Confirmation message
10. Update request will display with **Open** status on **Marketplace** screen:

**Marketplace**

Services Messages Files

Search for vendors and products...

**Title Services** Title from \$0

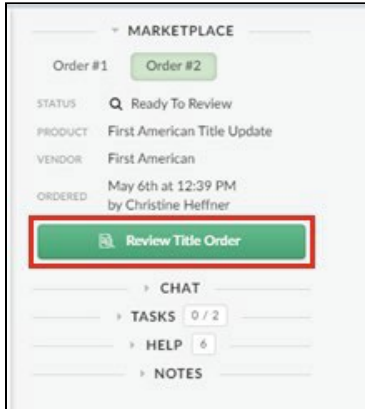
Status	Marketplace Ord...	Vendor	Product	Price	Placed	Completed
Completed	FAM-2021-269	First American	First American Title		May 4th at 1:07 PM	May 4th at 2:37 PM
Completed	FAM-2021-279	First American	First American Title Update		May 6th at 12:39 PM	May 6th at 1:28 PM
Open	FAM-2021-283	First American	First American Title Update		May 7th at 4:00 PM	





## Importing Completed Update Request

1. Completion email will be delivered when your Update request is finalized
2. There are two options for importing the results:
  - a. Qualia file – Commitment screen – Marketplace – click **Review Title Order**



- b. Qualia file – Marketplace – Title Services – Double-click the Completed order

Title Services <span>Order Another Product</span>						
Status	Marketplace Order #	Vendor	Product	Price	Placed	Completed
Completed	FAM-2023-134	First American	AgentNet Search Product		May 11th at 8:07 AM	May 11th at 9:32 AM
Completed	FAM-2023-135	First American	Update		May 11th at 9:33 AM	May 15th at 9:32 AM
Completed	FAM-2023-144	First American	Update		May 15th at 10:05 AM	May 15th at 10:18 ...

3. Import wizard will launch displaying tabs for review:
  - a. On the **Submitted Data** tab, review the **First American Title Update Documents** section for documents included with the update
  - b. Review other Order Details
  - c. On the **Requirements and Exceptions** tab, review any new phrases included with the Update

Order ( #FAM-2021-280 ) from First American Completed Order

Submitted Data Requirements And Exceptions Messages Feedback

First American Title Update Documents **a**

ADDITIONAL DOCUMENT: update letter\_2021-80.pdf

ADDITIONAL DOCUMENT: Update docs\_2021-80.pdf

Order Details **b**

ORDER NUMBER: 5163874

Legal Description

Estate Type

Fee Simple

About This Order

Order #FAM-2021-280 was completed.

Payment Terms: Pay On Delivery

- d. Select the **Import** button to begin the Sync Process

4. Sync Data screens will appear. Make the appropriate selections for:



- a. Legal Description
- b. Requirements
- c. Exceptions

**NOTE:** If a new data file (XML) was included in the Update Documents, a thorough phrase review will be necessary to avoid duplication of Requirements and Exceptions. Users should select to keep any manually entered phrases as well as the Vendor phrases and deselect existing file phrases as a best practice. If no new data file is included, make no changes to the Requirements and Exceptions screen defaults.

Syncing order data

Resolving conflicts...

Which requirements should we use?

Yours	Vendor's	Keep Yours	Keep Vendor's
The Proposed Insured must notify the Company in writing of the name of any party not referred to in this Commitment who will obtain an interest in the Land or who will make a loan on the Land. The Company may then make additional Requirements or Exceptions.		<input type="radio"/>	<input checked="" type="radio"/>
Pay the agreed amount for the estate or interest to be insured.		<input type="radio"/>	<input checked="" type="radio"/>
Pay the premiums, fees, and charges for the Policy to the Company.		<input type="radio"/>	<input checked="" type="radio"/>
Documents satisfactory to the Company that convey the Title or create the Mortgage to be insured, or both, must be properly authorized, executed, delivered, and recorded in the Public Records.		<input type="radio"/>	<input checked="" type="radio"/>
Duly authorized and executed Deed from Shirley Seller, to Benjamin Buyer, to be executed and recorded at closing.		<input type="radio"/>	<input checked="" type="radio"/>
Duly authorized and executed Mortgage from Benjamin Buyer, to Bank of America, N.A., securing its loan in the amount of \$80,000.00.		<input type="radio"/>	<input checked="" type="radio"/>
The Proposed Insured must notify the Company in writing of the name of any party not referred to in this Commitment who will obtain an interest in the Land or who will make a loan on the		<input type="radio"/>	<input checked="" type="radio"/>

## 5. When wizard completes, close screen



## Supporting Documents

1. Navigate to Documents screen and open **Title Documents** folder

NAME ▲
Closing Package
Escrow Documents
Search Documents
Title Documents
Trash (Empty)

2. Documents included with your Update request will display:

NAME	TYPE	MODIFIED	
↑ .. All Files			
Folder FAM-2021-270 Import 1		May 4th, 2:39 PM	<input type="checkbox"/>
Folder FAM-2021-280 Import 1		May 6th, 2:07 PM	<input type="checkbox"/>

NAME	TYPE	MODIFIED	
↑ .. Title Documents			
File update letter_2021-80.pdf - May 6th, 2:07 PM		May 6th, 2:07 PM	<input type="checkbox"/>
File Update docs_2021-80.pdf - May 6th, 2:07 PM		May 6th, 2:07 PM	<input type="checkbox"/>

## Product Guide

- **Amendment** - XML data file and Documents
- **Date Down** - Update Letter or Updated ASP and documents
- **Update** - Update Letter or Updated ASP and documents