



Policy Upload Email Process for Qualia

Learn how to electronically upload First American Title policy images using the Qualia email feature.

Policy Upload Email Setup

Beginning in Qualia:

1. Create a new Contact in Qualia for First American Policy Upload with email policyupload@firstam.com

The screenshot shows the Qualia web interface. The top navigation bar includes 'Qualia', 'Orders', 'Contacts' (selected), 'Calendar', 'Accounting', 'Reports', 'Partners', and 'Admin'. On the left, there are tabs for 'Companies' and 'People'. The 'People' tab is active, showing a table of contacts. A new contact entry is visible with the following details:

Name	Job Title	Company	Email	Work Phone	Cell Phone
Policy Upload	Representative	First American Title Insurance Company	anupload@firstam.com	Not set	Not set

An 'Add Contact' button is visible in the top right corner of the 'People' section.

Under **Admin/Email Templates**:

2. Create an email template
NOTE: Subject line should be **[Firm Name] Policy Upload**
3. In the body, insert the **Agent ID** number (AgentNet Account number) in the first line **"Agent ID: XXXXX"**
NOTE: To obtain the AgentNet account number contact the ASC or your Sales Representative.
4. In the second line, add **"File Number:"** and the smart tag for the order number - **{order_number}**

The screenshot shows the 'Email Templates' page in Qualia. On the left, there is a sidebar with a search bar and a list of templates. The 'First American Policy Upload' template is selected, showing its subject line 'ABC Demo policy upload for First America'. The main area is divided into 'Write' and 'Preview' tabs. The 'Write' tab is active, showing the template's content:

NAME: First American Policy Upload

SUBJECT: Write Preview

ABC Demo policy upload for First America

CC: Select Parties...

BCC: Select Parties...

Write Preview Include Signature

Arial 14 B I U A [icon] [icon]

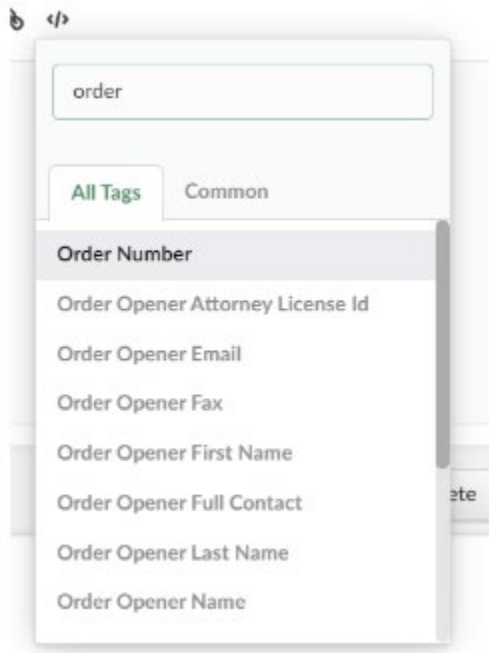
Agent ID: 4068750 **3**

File Number: {order_number} **4**

At the bottom right, there is a 'Delete' button.

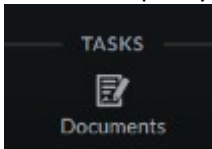


NOTE: Use the smart tag tool in the toolbar to insert the smart tag:

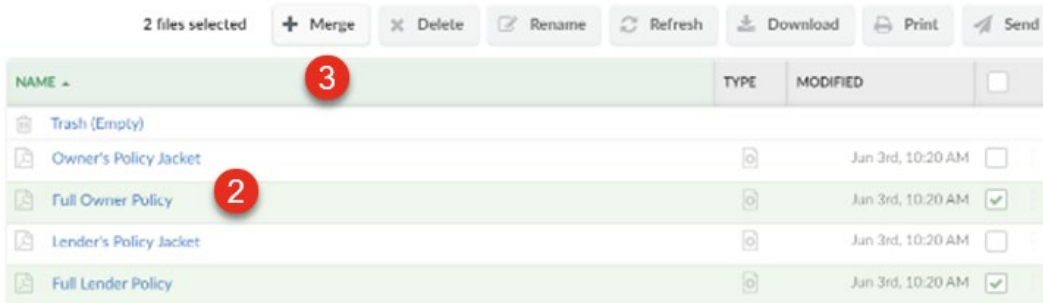


User Process

1. When final policy schedules are completed, proceed to **Documents**



2. Select policy(ies) for upload
3. For files with multiple policies, select **Merge** from the toolbar



4. If merging multiple files, rename to **Policy Upload**





5. Select the checkbox for the merge file
6. Click **Send**

1 file selected Restore Name Delete Rename Download Print Send

NAME	TYPE	MODIFIED	
Trash (Empty)			
Full Lender Policy		Jun 3rd, 10:20 AM	<input type="checkbox"/>
Full Owner Policy		Jun 3rd, 10:20 AM	<input type="checkbox"/>
Lender's Policy Jacket		Jun 3rd, 10:20 AM	<input type="checkbox"/>
Owner's Policy Jacket		Jun 3rd, 10:20 AM	<input type="checkbox"/>
Policy upload		Sep 8th, 12	<input checked="" type="checkbox"/>

7. Select the Policy Upload email template

Send Message for Order #AELQGA06032022b

Recipients CC

First American Policy Upload

No Template

First American Policy Upload

NOTE: Template will display the body of the email containing the Agent ID and File number:

Send Message for Order #AELQGA06032022b

Recipients CC

First American Policy Upload

ABC Demo policy upload for First America

Arial 14 B I U A

Agent ID: 4068750

File Number: AELQGA06032022b

Policy upload.pdf



8. In the **Recipient** section, select the **Policy Upload** contact

9. At the bottom of the template in the **via** section, select “**email with attachments**”

10. Click **Send**