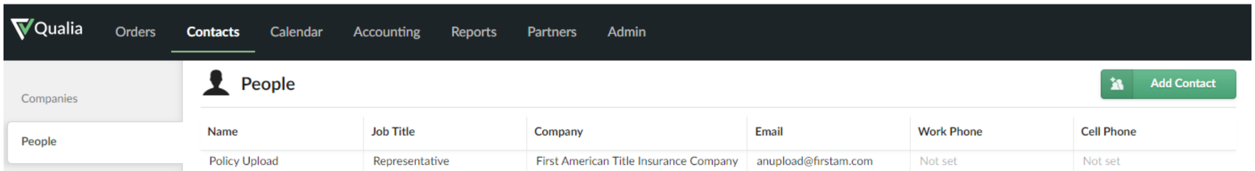
Policy Upload Email Process for Qualia

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

Policy Upload Email Setup

Beginning in Qualia:

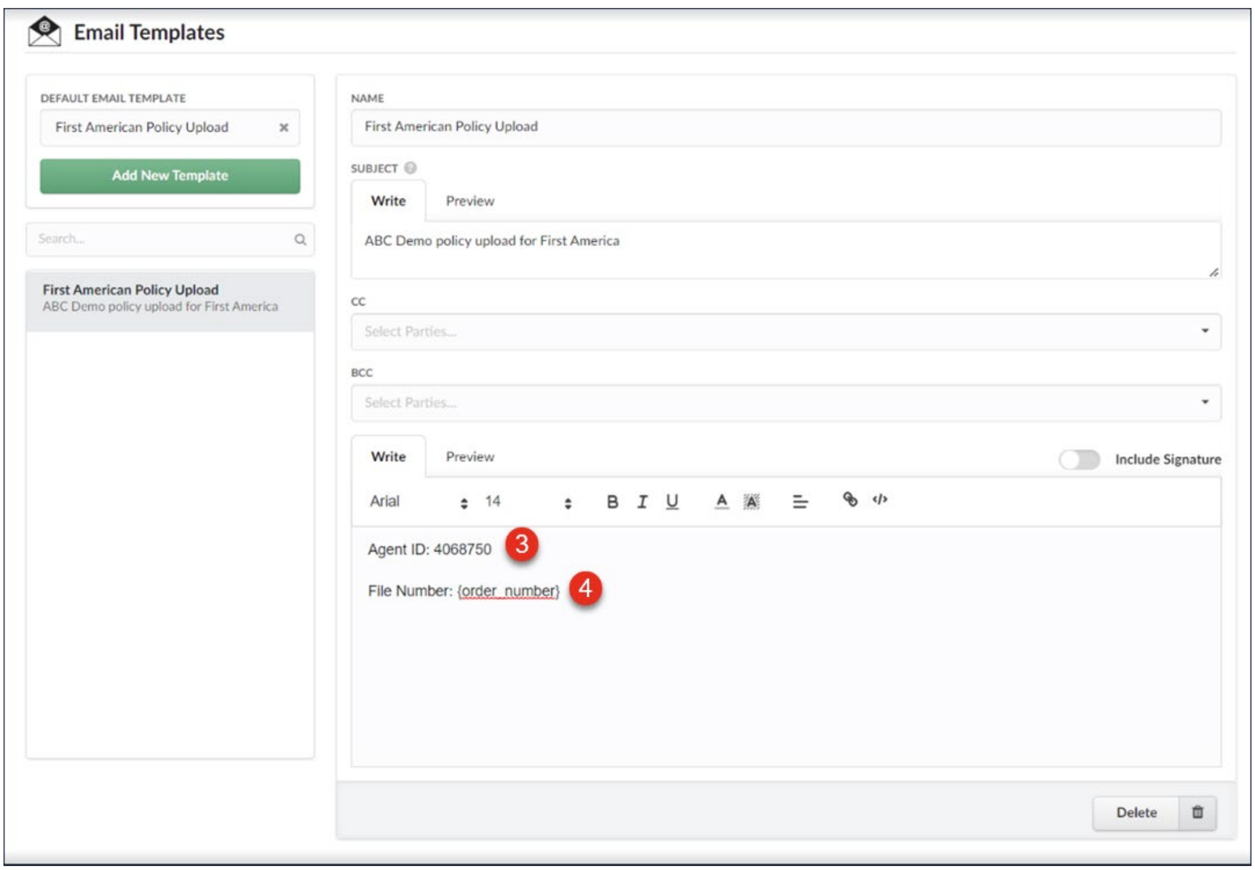
1. Create a new Contact in Qualia for First American Policy Upload with email policyupload@firstam.com



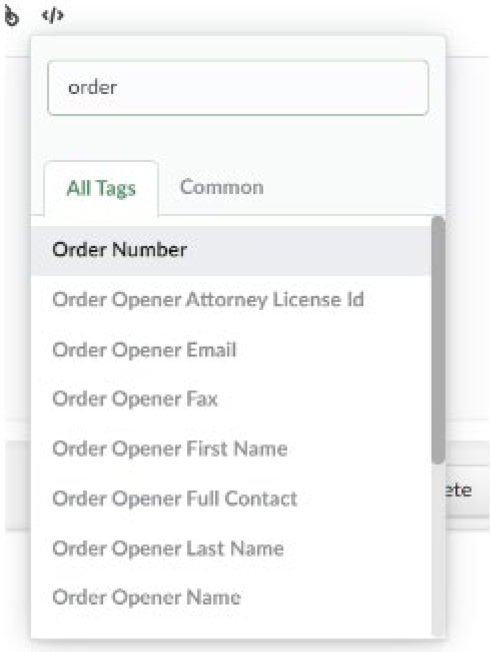
Under **Admin/Email Templates**:

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}**



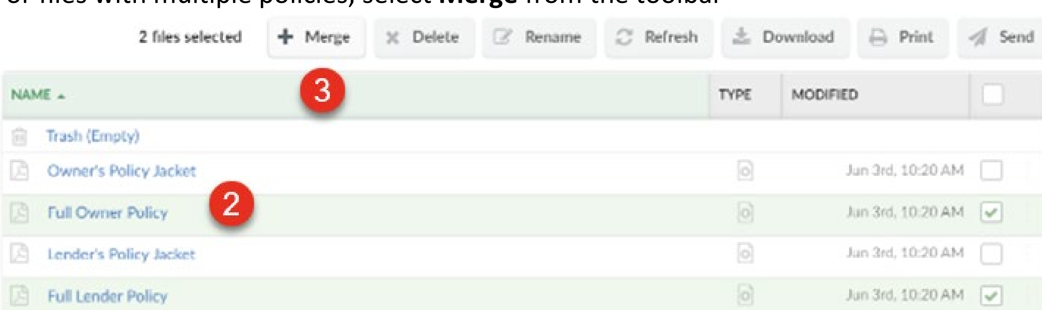
NOTE: Use the smart tag tool in the toolbar to insert the smart tag:



User Process

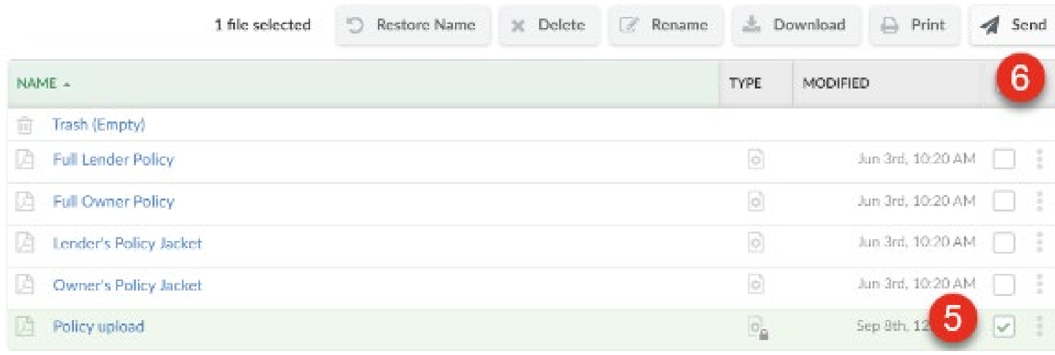
1. When final policy schedules are completed, proceed to **Documents**

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

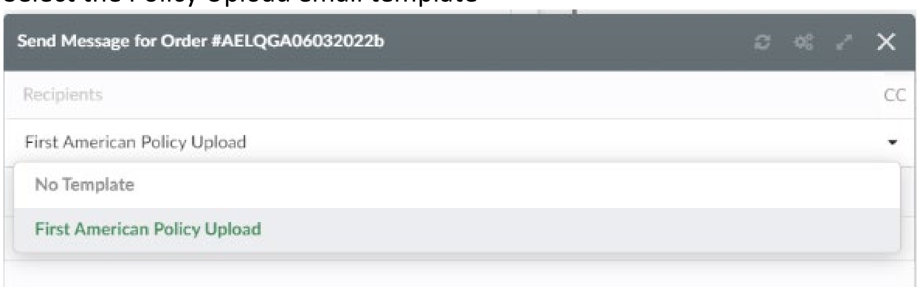


4. If merging multiple files, rename to **Policy Upload**

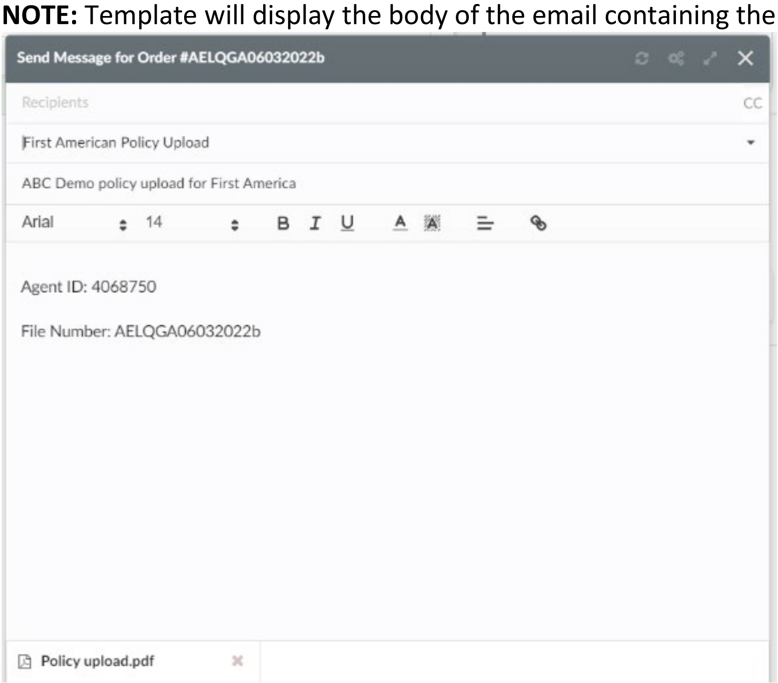
5. Select the checkbox for the merge file
6. Click **Send**



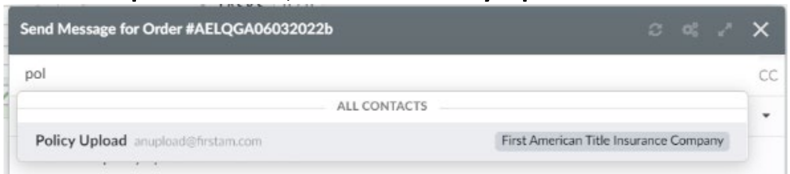
7. Select the Policy Upload email template



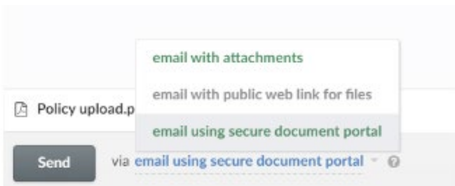
NOTE: Template will display the body of the email containing the Agent ID and File number:



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



9. At the bottom of the template in the **via** section, select "e**mail with attachments**"



10. Click **Send**