Qualia Connect: Quick Start Guide

Real Estate Agents, Buyers, & Sellers, get up and running in just three steps.

Welcome to Qualia Connect, your secure, all-in-one communications platform for a smooth and transparent closing experience. This guide will walk you through three simple steps to get started and get the most of the platform.

STEP 1: Your First Login

Getting started is quick and easy.

Look for the Welcome Email.
You'll receive a welcome email from Insured Titles with a link to access your file.

Create Your Account.
When you click the link, you can create a password. For an even easier experience, use the "Sign in with Google, Microsoft, or Yahoo" option to use your existing email credentials. No need to remember a new password!

Quick Setup
The first time you log in, you'll be guided through a quick setup to confirm your contact information and choose your preferences, such as seeing message previews in your email.

Too many notifications? You can turn off notifications in Qualia Connect by following these steps:

1. **Access User Settings:**
   - Click on your name in the upper-right corner of the
   - Connect interface.
   - Select Settings from the dropdown menu.
2. **Navigate to Notifications:**
   - In the Settings menu, open the Notifications tab.
3. **Adjust Notification Preferences:**
   - In the Notifications table, locate the specific events for which you want to stop receiving notifications.
   - Toggle the notification settings to "None" to disable notifications for those events.
4. **Save Changes:**
   - After making your adjustments, click Save to apply the changes.

STEP 2: Finding Your Way Around

Your Qualia Connect portal is organized into five simple tabs that mirror the sections in your Qualia file.

Overview Tab
See the real-time status of your closing at a glance with the **Progress Tracker**. You can also find contact information for all parties involved in the transaction.

Inbox Tab
Securely send and receive messages with your closing team, all in one place. You can attach documents and add other parties to the conversation as needed.

Tasks Tab
This is your to-do list. Here, you will complete important action items, such as filling out information requests or e-signing documents.

Activity Tab
A running, time-stamped history of every action that has taken place in your Qualia Connect account.

Documents Tab
This is your central library for every document shared throughout the closing process. You can view, download, and search for documents at any time.

STEP 3: Key Actions You'll Take

When you have a new task, you'll receive a notification. Simply click the link, and you'll be taken directly to the request to fill out information or e-sign a document.

Completing Tasks
When you have a new task, you'll receive a notification. Simply click the link, and you'll be taken directly to the request to fill out information or e-sign a document.

Sharing Documents
You can securely upload and share documents either by attaching them to a message in the Inbox or by adding them directly in the Documents tab.

Checking on Your Files
From the homepage, you can view all of your open and past closings, making it easy to keep track of everything in one place.

INSURED TITLES

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