

FIRST INSURANCE<sup>®</sup>  
— OF CANADA — FUNDING  
A WINTRUST COMPANY

# First InSite *Enhanced*

Account Management

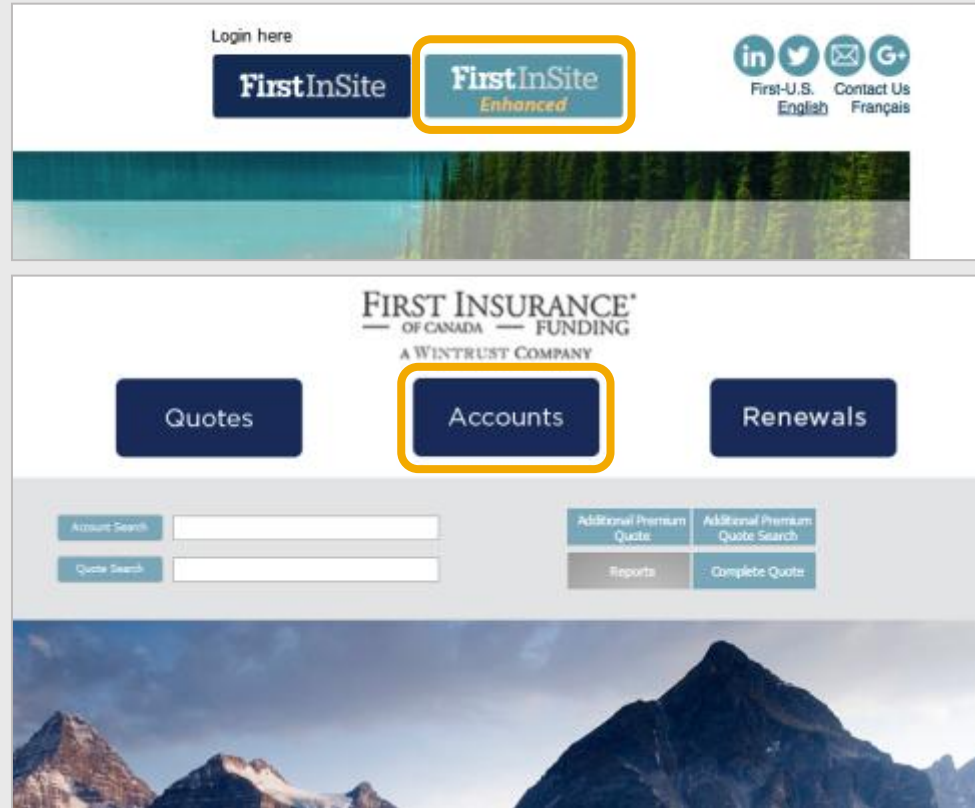
# Account Management

## Topics covered in this guide:

1. Account Management
2. Disbursements
3. Documents
4. Tips

# Login

- › Click on the **First InSite Enhanced login button**  
firstinsurancefunding.ca
- › Login with your user name (email address) and temporary password provided in your welcome email
- › Select **Accounts**



# Account Management

- › Enter in search criteria and click **search**
- › Click on the account you wish to access

**Client Status - Search**

Account #:  Name:  Serial #:   
Address:  City:  Policy #:   
Region:  Postal Code:  Pymt Amt Rcvd:   
Customer ID:  Quote #:

Include Archived Accounts

Advanced... **Search**

Account No	Name	Address	City	Region	AMS
901-2436	Praxis Corporation	49817 Yonge Street	Hamilton	ON	0
901-2428	Pony Tires & Brakes	1053 Common St.	Hamilton	ON	0
901-786	Soylent Corporation	3877 Oakwood Drive	Scarborough	ON	0

# Account Summary

- Summary tab provides a dashboard of the client's account
- Click **Account Options** drop down to view or print Customer Account History, Report or to view Payment Schedule

Client Status - 901-2428 - Pony Tires & Brakes

Account Number: 901-2428 Account Name: Pony Tires & Brakes Current / Active

Summary Customer Policies Terms Disbursements Posted Payments Documents Notice Delivery

Manual EFT Payments

Customer Information		Summary Financials	
Account Number:	2428	Total Premium:	27,000.00
Account Holder:	Pony Tires & Brakes	Down Payment: (17.000%)	4,590.00
Main Address:	1053 Common St. Hamilton, ON M5H 1K4	Amount Financed:	22,410.00
Brokerage:	A00003 - Best Insurance Brokers Inc.	Non-Refundable Fee:	0.00
Broker Contact:	Darren Palmer	Finance Charge:	1,144.20
Broker Phone:	(416) 987-6543	Total of Payments:	23,554.20
Broker Email:	dpalmer@bestinsurance.cc	No. of Installments:	10
Customer ID:	--	Installment Amount:	2,355.42
Received Date:	--	APR:	10.990%
Creation Date:	15/07/2016	Flat Rate:	4.238%
Created By:	PBS System	Installments Made/Remaining:	0 / 10
Effective Date:	15/07/2016	Next Installment Amount:	2,355.42
Archive Date:	--	Next Late Fee Amount:	117.77
Balance Due Date:	--	Shortage:	0.00
Next Intent Date:	20/08/2016	Auto Assessed Late Fee Breakdown	
Scheduled Cancellation Date:	04/09/2016	Account Balance (inc. fees):	23,554.20
Cancellation Hold Date:	--	Current Amount Due:	0.00
Manual Cancellation Date:	--	14-Day Payoff	
Next Reinstatement Date:	--	Calculator	\$ 22,805.27
Next Late Fee Date:	20/08/2016		
Last Intent Date:	--		
Last Cancellation Date:	--		
Last Reinstatement Date:	--		

Account Options... Customer Account History Report View Payment Schedule

Client Status - 901-2428 - Pony Tires & Brakes

Customer Account History Report

Customer Account History Report

Customer Account History Report

Customer Account History Report

Customer Account History Report

Customer Account History Report

Installation Schedule (Copy) - Choice

https://demo.pbs.first-quotes.com/MainViewDialog.aspx?SS=19d46b5e-3d6f-4643-adbc-5c6d6c6f6d6c

#	Due Date	Late Fee Date	Payment Applied	Installment Amount	Adjustment	Original Loan
1	20/08/2016	20/08/2016	2,355.42	2,355.42	2,355.42	2,355.42
2	20/09/2016	20/09/2016	2,355.42	2,355.42	2,355.42	2,355.42
3	20/10/2016	20/10/2016	2,355.42	2,355.42	2,355.42	2,355.42
4	20/11/2016	20/11/2016	2,355.42	2,355.42	2,355.42	2,355.42
5	20/12/2016	20/12/2016	2,355.42	2,355.42	2,355.42	2,355.42
6	20/01/2017	20/01/2017	2,355.42	2,355.42	2,355.42	2,355.42
7	20/02/2017	20/02/2017	2,355.42	2,355.42	2,355.42	2,355.42
8	20/03/2017	20/03/2017	2,355.42	2,355.42	2,355.42	2,355.42
9	20/04/2017	20/04/2017	2,355.42	2,355.42	2,355.42	2,355.42
10	20/05/2017	20/05/2017	2,355.42	2,355.42	2,355.42	2,355.42

Payment Schedule

# Customer Tab

- › The **customer** tab allows you to view and edit customer details
- › You can enter an email address here and chose to email notices to your client

Client Status - 901-2428 - Pony Tires & Brakes

Account Number: 901-2428 Account Name: Pony Tires & Brakes Current / Active

Summary **Customer** Policies Terms Disbursements Posted Payments Documents Notice Delivery

Manual EFT Payments

From Quote: 3129  
Submitted By: A00003 - Best Insurance Brokers Inc.

Name & Address		Contact	
Name:	Pony Tires & Brakes	Main Phone:	<input type="text"/>
		Contact:	<input type="text"/>
Address:	1053 Common St.	E-Mail:	<input type="text"/>
		Main Fax:	<input type="text"/>
City:	Hamilton	Create:	[New Contact Info] ▼
Country:	Canada ▼		
Province/ Postal:	ON - Ontario ▼ M5H 1K4		
	Additional Addresses		
Email Notices:	<input type="checkbox"/>		
Broker Contact:	dapalmer Darren Palmer		
Broker Phone:	(416) 987-6543		
Broker Email:	dpalmer@bestinsurance.cc		

Save Cancel

# Disbursements – Broker Funding

- › **Disbursements** tab outlines broker funding details

Client Status - 901-2428 - Pony Tires & Brakes

Account Number: 901-2428 Account Name: Pony Tires & Brakes Current / Active

Summary Customer Policies Terms **Disbursements** Posted Payments Documents Notice Delivery

Manual EFT Payments

[Back to Disbursement List](#)

**Disbursement Details (1 of 1)**

Payee: A00003 - Best Insurance Brokers Inc.  
Amount: 22,410.00 Status: Unpaid  
Type: Original Release Date\*\*: 15/08/2016  
Method: EFT Disbursed Date: 15/08/2016  
Bank Account Code: A00003-1 Cleared Date:  
Serial Number:  
Do Not Hold for Down Payments or Installments:

Policies for assigned loan only:

Policy #	Carrier	MGA	Coverage	Premium
<input checked="" type="checkbox"/> 47847-009	Zurich Insurance Group		PACKAGE	25,000.00

Holds: Value: Add

Hold Type	Value
No holds defined.	

\*\* Please note, the release date is an anticipated date and subject to change. The date disbursed is the actual date of the disbursement.

Edit Close

Account Options... Edit Close

# Documents

- › Select the **documents** tab to view and print documents pertaining to an account
- › Click on document you wish to view
- › Click on yellow bar to open the document
- › Choose to either view, save, or print the document

Client Status - 901-2428 - Pony Tires & Brakes

Account Number: 901-2428 Account Name: Pony Tires & Brakes Current / Active

Summary Customer Policies Terms Disbursements Posted Payments **Documents** Notice Delivery

Manual EFT Payments

Title	Description	Method	Date Created	Pages
Notice of Financed Premium		Day End	15/07/2016	1
Notice of Acceptance		Day End	15/07/2016	6

Client Status - 901-2436 - Praxis Corporation

Your document is now ready. Please click here to open it.

Account Number: 901-2436 Account Name: Praxis Corporation Current / Active

Summary Customer Policies Terms Disbursements Posted Payments **Documents** Notice Delivery

Manual EFT Payments

Title	Description	Method	Date Created	Pages
Notice of Financed Premium		Day End	15/07/2016	1
Notice of Acceptance		Day End	15/07/2016	6

1 / 1

Refer to this agreement number in all correspondence **902-91**

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**Notice of Financed Premium (Insurer)**

Insurance Company / Wholesaler INTERNATIONAL INSURANCE COMPANY OF HANNOVER 215 - 130 KING ST. WEST TORONTO, ON M5X 1A4	Insured (Name and Address) Mario Larouche o a CWB Welding P.O. Box 30510 Oshawa, ON L1J 8L8
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Payment schedule



# Tips



1. Your login is now your email address
2. Login credentials will be emailed to you within 5 business days from training.
3. Access to old quoting system for existing loan management only
  - endorsements, funding inquiries, notices, etc.
4. Renewals will be available in the new system
5. Training guides, videos, FAQs, webinars available on our website – Visit First InSite Enhanced tab

# Contact Us

Contact a member of your dedicated service and support team with any questions or you can reach us at:

[clientservices@firstinsurancefunding.ca](mailto:clientservices@firstinsurancefunding.ca)

1 888 232 2238