

First InSite *Enhanced* FAQ

1

Why is First InSite changing?

We are expanding the functionality of First InSite as part of our commitment to deliver on our innovation promise. First InSite Enhanced will equip you with the ability to easily and conveniently offer payment options and now also includes eSignatures, integrated credit card payments, paperless workflows, and reporting.

This new platform will also allow us to more easily provide technological improvements in the future, like integrations and more payment methods.

2

Are there specific system requirements to use First InSite Enhanced?

First InSite Enhanced is cloud based and independent of your operating system and browser.

3

Will training be provided? What if I have additional questions?

Your **Relationship Manager** will be happy to provide in-office training and we host online webinars. Check our website for the schedule.

We also have online training guides on our website for your reference.

4

How do I access First InSite Enhanced?

You can access the system by visiting **login.firstinsite.ca** or by clicking on the First InSite Enhanced button on our home page.

Be sure to update any old bookmarks or shortcuts prior to entering your login information. Remember, your login is now your email address.

5

What if my client wants to receive their documents in French?

You can provide your client documentation, including the online DocuSign process in French. Simply select "Français" in the Preferred Language field during the quoting process.

6

Will my renewals be available in First InSite Enhanced?

Yes. Your renewals will be in First InSite Enhanced and can be easily searched by account number or client name.

Renewals are evergreen so don't require your clients' signature.

7

How can I get a U.S. Currency Quote?

Call your **Account Manager** and they will be happy to help you.

8

How can I process a Returned Premium (Negative Endorsement)?

To process a negative endorsement, mail us a cheque with a cover note, including client's name and account number.