

## Frequently Asked Questions

### **Will Web Quote still be available?**

As of the launch of First InSite, Web Quote will no longer be available.

### **What happened to my Web Quote renewals, quotes, rates, and programs?**

We have conveniently migrated all your Web Quote information to your First InSite account, for you.

### **How do I get to First InSite?**

You can access First InSite by either by clicking on the First InSite login button on the home page of our [website](#) or by going directly to [www.firstinsite.ca](http://www.firstinsite.ca).

### **How do I login to First InSite?**

When you were set up in First InSite, you were sent an email with instructions for how to log in. If you do not have that email, click on the forgotten password link and follow the instructions. If you've forgotten your user name please contact your [Account Manager](#) or [Client Services](#).

### **What if I've forgotten my password?**

Simply click on the "Forgot Password?" link on the home page of [First InSite](#). You'll be instructed on how to reset your password.

### **I'm a new user. How do I get access to First InSite?**

To get access to First InSite, contact your [Account Manager](#). They will be happy to set you up in the system and provide you with a username and password.

### **Is there training available?**

For comprehensive guides that can either be printed or viewed online, visit the [Online Resources](#) page of our website or view our [Webinar Schedule](#) to attend a one-hour demonstration. To request a training session for your office, contact your [Relationship Manager](#).

### **Can I get a quote without policy coverage details?**

Yes, you can. That's a part of First InSite's efficient 3-step process. You enter minimal client and premium details and in seconds have created a Payment Options Invoice for your client. You only need to complete the policy coverage details when you clients chose easy monthly payments.

### **How can I edit a quote?**

In the Account Submission List tab, change the status box located in the top left to "pending". Search by Pending Submission ID or Customer Name. Once the client is located, click Duplicate to edit quote details. For more details and screen shots view our [Online Guides](#).

**Payments. Solutions. Simple.**

## Can I reprint a quote?

Yes, you can. Click on the Account Submission List tab and change the status box to “pending”. You can search by Pending Submission ID number or Customer Name. Click the corresponding link, a copy of the quote will open again, which can be printed.

## Why doesn't the Payment Options Form open?

A pop-up blocker might be preventing the window with the Payment Options Form from opening. When in First InSite try to open a document, then select the option to “allow pop-ups from this site” or disable your pop-up blocker.

## What information belongs in the Internal Customer ID field?

This field is for your reference. You can enter the information that your organization uses to track that client. Some brokers chose to enter their Broker Management System (BMS) client ID number in this field.

## I have a signed Premium Finance Agreement (PFA), now what do I do?

Log into First InSite. This is the most efficient and secure way to submit a signed PFA for processing. For detailed instructions and screenshots, refer to our [Loan Submission Guide](#).

## Why isn't there an option to renew certain accounts?

Accounts are eligible to renewal if they are within the range of 2 months prior to the expiry date and 6 months past this date. If an account is beyond this date range it cannot be renewed in First InSite. You may also wish to check that the account has not already been renewed. In the Account Submission List, sort the list for “pending”. If the Action column says “True”, it has already been renewed.

## Can I edit my client's information in First InSite?

Yes, you can. Click on the Accounts tab. Find your client in the list or use the search boxes to search by Account Number, Customer Name, or Policy Number. Click on the client's account number. Here you can change the client's address or update the client's banking information. Via this screen you can also print an account summary, view policy details, or request additional / return premium (endorsements).

## Can I print a payment schedule for my client from First InSite?

Yes, you can. Click on the Accounts tab. You can find your client in the list or use the search boxes to search by Account Number, Customer Name, or Policy Number. Click on the client's account number. You can print this Account Summary, which includes a schedule of payments.

## How do I process a positive endorsement?

In the Accounts tab, locate the client and click on their account number. Click on Additional Premium Request and complete the required fields. Please note, endorsements cannot be processed for accounts with payments in default.

## What if my question isn't here?

You can view our [Online Guides](#) for assistance. You're welcome to register for one of our [Online Webinars](#) for a demonstration of First InSite. You can also contact [your dedicated Region or Account Manager](#), or contact [Client Services](#). We are happy to help you.