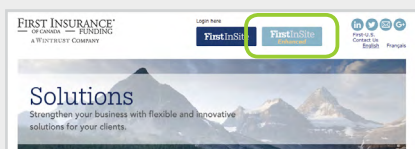


First InSite Lite

FAQ

1 How do I access First InSite Lite?

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.



2 Are there specific system requirements to use First InSite Lite?

First InSite Lite 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 contact your office to provide in-office training.

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

4 How do I change the language default?

You can switch the language preference by using the language toggle located at the top right-hand corner of your screen. Your browser will remember your language preference.

5 Will my renewals be available in First InSite Lite?

Yes. Your renewals will be in First InSite Lite and can be easily searched by account number or client name. Renewals are evergreen so don't require your clients' signature.

6 How do I report a problem?

Contact **Client Services** and they will be happy to help you.

7 Where can I locate my client's documents?

First InSite Lite provides access to reprint the most pertinent documents to the broker and therefore only broker copies are available. These can be found on the Documents tab of the account.

Contact **Client Services** to access all client-facing documents.

8 I am currently using First InSite Enhanced but would like to use First InSite Lite. How can I get access?

Contact your **Relationship Manager** to request access to First InSite Lite.

9 I'm currently using First InSite Lite but would like access to more functionality (reports, additional premium quotes, etc.). How do I get more access?

Contact your **Relationship Manager** and they will be happy to help.

10 Can I have access to both First InSite Lite and First InSite Enhanced?

It is not possible for a single user to toggle between both First InSite Lite and First InSite Enhanced platforms. If you require quick and easy access to quoting, renewals, and basic account management functionality, First InSite Lite is a perfect option for you.

Contact your **Relationship Manager** to discuss your requirements.