

FIRST INSURANCE[®]
— OF CANADA — FUNDING
A WINTRUST COMPANY

First InSite Lite

Accounts

Accounts

Topics covered in this guide:

1. Clients
2. Policies
3. Disbursements
4. Documents
5. 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

Login here

First InSite **First InSite Enhanced**

in First-U.S. English Contact Us Français

FIRST INSURANCE
OF CANADA FUNDING
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First InSite

Broker Login

User Name: sarah.smth@bestinsurance.ca

Password: *****

Forgot Password

Accounts

The screenshot shows the 'Accounts' page in the FirstInSite Lite system. At the top, there is a header bar with 'Currency: CAD' and a Canadian flag icon on the left, and 'Français' and a 'Logout' button on the right. Below this is a navigation menu with four items: 'Quotes', 'Renewals', 'Accounts' (which is highlighted with a grey background), and 'Contact Us'. The main content area features a light blue rounded rectangle with the heading 'Search for a Client'. Below the heading are four input fields labeled 'Name', 'Account Number', 'Customer ID', and 'Quote Number'. To the right of these fields is a teal button labeled 'Search >'.

- › Click on Accounts in the top menu bar
- › Search for a client by entering any of the information and click **Search**

Accounts

Search for a Client

Name

Account Number

Customer ID

Quote Number

Search >

Account Number	Name	Address	City	Region	Broker Contact
1230	Sam's Grocery Store	12 Smith Road	Toronto	ON	Jennifer Davis
935	Bob Smith	123 Road	Toronto	ON	Jennifer Davis
109	MFC Industrial Ltd., MFC Energy Corporation, MFC R	400, 1035 - 7 Avenue SW	Calgary	AB	Jennifer Davis

3 items

- > A list of matching accounts up will display. Select the account you wish to view by clicking on that row

Client tab

- › You can update select information:
 - › Clients contact name
 - › Broker Reference ID,
 - › Document language
- › You add or edit your clients email address and phone number
- › You can chose to email documents to your client (instead of post)
- › Click **Save**

The screenshot shows the 'FirstInSite Lite' interface with a 'Quotes' tab. The form contains the following fields and options:

- Company Name:** 12 policies
- Contact Name:** Best Client
- Account Number:** 1446
- Broker Reference:** BST123
- Document Language:** English (dropdown menu)
- Address:** 12 policy lane
- City:** Toronto
- Province:** ON (dropdown menu)
- Postal Code:** L1L 1L1
- Country:** CA
- Email:** (empty text box)
- Phone Number:** (empty text box)
- Email Notices:** Radio buttons for Yes and No, with 'No' selected.

A blue 'Save' button is located at the bottom right of the form.

Client tab

- › You can produce a payment schedule for your client which can be printed or emailed



Installments Made	3
Installments Remaining	8
Next Installment Amount	1,060.90
Next Installment Date	24/09/2017
Account Balance	8,487.20
Current Amount Due	0.00

Payment Schedule

[View/Print Payment Schedule](#)

Policies tab


- › A look up screen for existing policies for that client

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals **Accounts** Contact Us

Account Number 1446



Client **Policies** Disbursements Documents

Policy List 

Policy Number	01	Loan:	Original Loan	Coverage:	A/M - ACCIDENT & MEDICAL
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00002 - Aviva Canada - TOR
		Premium:	1,000.00	MGA:	
Policy Number	002	Loan:	Original Loan	Coverage:	AIR - AIRCRAFT
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00006 - Chubb Insurance - TOR
		Premium:	1,000.00	MGA:	
Policy Number	003	Loan:	Original Loan	Coverage:	B/A - BUSINESS AUTO
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00016 - Liberty Insurance Company
		Premium:	1,000.00	MGA:	
Policy Number	004	Loan:	Original Loan	Coverage:	AIRPTL - AIRPORT LIABILITY
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00013 - Inter Hannover Canada
		Premium:	1,000.00	MGA:	G00007 - Profescau Assurance Specialisee Inc.
Policy Number	005	Loan:	Original Loan	Coverage:	AUTO - AUTOMOBILE
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00011 - HDI-Gerling Industrial Insurance Company
		Premium:	1,000.00	MGA:	C00003 - Talma Insurance Group - Toronto

Disbursements tab

- › You can view dates when disbursement funds will be released

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals **Accounts** Contact Us

Account Number 1446



Client Policies **Disbursements** Documents

Disbursements

Type:	Original	Scheduled Funding Date:	08/07/2017
Status:	Paid	Actual Funding Date:	10/07/2017
		Funding Amount:	12,000.00
Total:			12,000.00

1 items

Documents tab

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals **Accounts** Contact Us

Account Number 1446

Client Policies Disbursements **Documents**

Documents

Type	Date Created	Pages	Reprint
Notice of Intent to Cancel	25/07/2017	1	Reprint
Notice of Intent to Cancel	23/06/2017	1	Reprint
Notice of Acceptance	08/06/2017	2	Reprint

3 items

Tips

1. Your login is the same as First InSite Enhanced (your email address). If you're a new user, your login credentials will be emailed to you within 5 business days of training
2. Replace any existing bookmarks with this URL: <https://ficdn.first-quotes.com/Login>
3. Access to old quoting system for existing loan management only
 - endorsements, funding inquiries, notices, etc.
4. Renewals from the old system and First InSite Enhanced are available in the new system
5. Training guides, videos, and FAQs are available on our website – Visit First InSite Lite 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

1 888 232 2238