

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

First InSite

Creating a Quote



FirstInSite

Topics covered in this manual:

1. Creating a quote

Creating a Quote

1. Create

Simple Login

Complete basic
information only

Easily create a quote by accessing First InSite via our website.

Creating a Quote

1. Login by clicking the First InSite button on firstinsurancefunding.ca using your User Name and Password
2. Using the tabs at the top, select **New Quote**

The screenshot displays the First InSite web application interface. The top navigation bar includes the First Insurance Funding of Canada logo, a 'First InSite Login' button (circled in yellow with a '1'), and social media icons. Below the navigation bar, there are search fields for Account #, Customer Name, and Policy #, along with a 'Search' button. A secondary navigation bar contains tabs for 'Summary Dashboard', 'New Quote' (circled in yellow with a '2'), 'Quote Requests', and 'Account Submission List'. The main content area shows a 'Summary Dashboard' for 'Best Insurance Brokers Inc.' with various account statistics.

Best Insurance Brokers Inc.	
Total Active Accounts:	6
Total Accounts Currently Past Due:	4
Total Accounts Scheduled to Cancel Within the next 3 days:	0
Cancelled Accounts:	2
Reinstatement Requests:	0
Accounts Eligible for Renewal:	35
Quote Request Queue:	1

Additional elements include a 'Welcome' message, a footer with 'Home | Terms & Conditions | Contact Us', and a copyright notice: '@ 2014 First Insurance Funding of Canada. All rights reserved.'

Creating a Quote

First InSite [Change Password](#) [Help](#) [Logout](#) [Français](#)
For help call 1-888-232-2238

Account #: Customer Name: Policy #: [Search](#)

[Summary Dashboard](#) [Accounts](#) [New Quote](#) [Quote Requests](#) [Account Submission List](#)

Manual One Page New Quote

Please select an insured from the drop-down list, or select "New" to add a new insured record.
Joe's Sports Shop

3 **Insured Information**

Internal Customer Id: Note : Enter TBD for customer ID if not yet assigned.
Customer Name:
Legal Name:
Contact First Name:
Contact Last Name: Note : Enter brokers name if customer contact name is unknown.
Industry Classification:
Email:
Mailing Address:
City:
Province:
Postal Code:
Country:
Language Preference:
Mobile Phone:
Work Phone:
Fax:

Physical Address

Same as above:
Physical Address:
City:
Province:
Postal Code:
Country:

4 [Save Insured Details](#)

3. Select an insured from the drop-down list, or select "New" to add a new insured record

4. Review or Enter Insured Information and click **Save Insured Details**

Creating a Quote

5. Enter the required policy premium information
NOTE: be sure to put a value in minimum retained field, even if "0"
6. Review the pre-selected list of questions and click **Next**

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Account #: Customer Name: Policy #: [Search](#)

[Summary Dashboard](#) [Accounts](#) [New Quote](#) [Quote Requests](#) [Account Submission List](#)

User steps:
1. Enter the required information below.
2. Select "Next" button below.

[Detailed Steps](#)

Customer Name: Joe's Sports Shop
Brokerage: Best Insurance Brokers Inc.
Brokerage Contact: 5 Melissa DiNardo
Language Preference: English

Total Premiums:	20000.00
Tax on Premiums:	1600.00
Total Policy Fees:	100.00
Tax on Policy Fees:	8.00
Total Invoice Amount:	21708.00
Effective Date:	11/01/2014 (mm/dd/yyyy)
Minimum Earned Premium: *	5000

*Enter the total amount that would be retained by the carrier(s) in the event the policy is cancelled.
Minimum retained policy or broker fee: ** 100.00
**Enter the total amount that would be retained by the brokerage in the event the policy is cancelled.

Is this Facility coverage? Yes No

Minimum earned premiums and fees must be disclosed above. Please review the following questions before proceeding to the next step:

10% or more of the total premium is Directors & Officers coverage:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are cancellable at short rate or pro rata	<input checked="" type="radio"/> Yes <input type="radio"/> No
Policies are fully earned on event	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are part of a master policy	<input type="radio"/> Yes <input checked="" type="radio"/> No
Policies are earned at an accelerated rate (ie Motorcycle)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Broker of record is your brokerage:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Insured is in bankruptcy:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Customer is a farm in Alberta:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Customer is a fishery in Prince Edward Island:	<input type="radio"/> Yes <input checked="" type="radio"/> No

6 [Back](#) [Next](#)

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Creating a Quote

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Account #: Customer Name: Policy #: Search

Summary Dashboard | Accounts | **New Quote** | Quote Requests | Account Submission List

User steps:

1. Enter the required information below.
2. Select "Create one pager" button below to generate pay plan for your customer.
3. Include the Invoice Payment Options Form with customer invoice.

Customer Name: Joe's Sports Shop
Brokerage: Best Insurance Brokers Inc.

Total Premiums:	\$20,000.00
Tax on Premiums:	\$1,600.00
Total Policy Fees:	\$100.00
Tax on Policy Fees:	\$8.00

Total Invoice Amount: \$21,708.00
Effective Date: 01-Nov-2014
Minimum Earned Premium: * \$5,000.00
*Enter the total amount that would be retained by the carrier(s) in the event the policy was canceled by the Minimum retained policy or broker fee: ** \$100.00
 **Enter the total amount that would be retained by the brokerage in the event the policy was canceled by the Facility coverage: No

Select Portfolio: FIRST Insurance Funding of Canada
Select Pricing Program: 17 & 10 12 Equal 20 & 9
Coverage: Commercial Personal Lines
Customer Monthly Withdrawal Date: 1
Date of First Monthly Withdrawal: 1-Dec-2014

Rate Calculate or Increase Down Payment 8

Selected Pricing Program:	17 & 10
Flat Rate:	3.00%
APR:	8.47%
Terms (months):	10
Down Payment(%):	17.00%

Down Payment: \$5,100.00
Instalment Amount: \$1,725.92
Finance Charge: \$651.24

Coverage Information 9

Send Contract document to Brokerage Contact : melissa.dinaro@bestinsurance.cc
Send To : xyz@abc.com

Create Payment Options Form 11 Close

*Acceptance of the contract maybe declined if one or more of the above restrictions are not met.

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7. Select Pricing Program and coverage details

8. Optional Click **Rate Calculate or Increase Down Payment** for rate calculator

9. Optional **Coverage Information** fields
Note: optional during quoting stage. Can complete upon submitting

10. Indicate whether you would like to send Payment Options Form via email

11. Click on **Create Payment Options Form** - PDF or email

Contact Us

We invite you to 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