

FIRST INSURANCE<sup>®</sup>  
— OF CANADA — FUNDING  
A WINTRUST COMPANY

# First InSite

Loan Submission

# FirstInSite

## Topics covered in this manual:

1. Submitting the loan

# Submitting the Loan

1. Login to [First Insite](#) - User Name and Password
2. Using the tabs at the top, select **Account Submission List**, locate the contract and click **Submit Account**

The screenshot shows the First InSite web application interface. At the top left, there is a 'First InSite Login' button circled in yellow with a '1' next to it. Below the navigation bar, there is a search section for 'Pending Submissions' with a table of active accounts. One of the 'Submit Account' buttons in the table is circled in yellow with a '2' next to it.

ID	Date	Company Name	Contract #	Contract Desc	Term Amount	Status	Action	Is Term Contract	Is Term Contract	PG	PG Title
150000000	15-Sep-2014	Best Insurance Brokers Inc.	BOVGA-1	Advanced Composites	\$20,000.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada
150000000	15-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada
150000000	15-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Direct Contract	True	PG	FIRST Canada
150000000	15-Sep-2014	Best Insurance Brokers Inc.	JOESS-1	Joe's Sports Shop	\$21,708.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada
150000000	15-Sep-2014	Best Insurance Brokers Inc.	TBD	McDonalds	\$12,000.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada
150000000	17-Sep-2014	Best Insurance Brokers Inc.	iba	Shelter's shoe store	\$20,100.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada
150000000	17-Sep-2014	Best Insurance Brokers Inc.	POPUL-1	Cave Car	\$20,100.00	Pending	Submit Account	Direct Contract	False	PG	FIRST Canada

# Submitting the Loan

**First InSite**

Change Password | Help | Logout

For help call 1-800-330-2238

Account # [ ] Customer Name [ ] Policy # [ ] Search

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

### On Line Account Submission Process

Customer Name:	Joe's Sports Shop	Total Account:	\$21,798.88
Interest Charge Total Due:	\$61.24	Amount of Deposit:	\$5,100.00
Term (months):	10 Months	Amount of Installments:	\$1,725.92

Step 1 : On Line Account Submission Process

**3** **Save Insured Details**

Associated Brokerage Contact: Melissa DiNardo

#### Insured Information

Industry Classification: Service - Other

Internal Customer ID: JOESS-1 Note: Enter TBD for customer ID if not yet assigned.

Customer Name: Joe's Sports Shop

Legal Name: Joe's Sports Shop

Contact First Name: Joe Note: Enter brokers name if customer contact name is unknown.

Contact Last Name: Smith

Mailing Address: 10069 Third Ave

City: Ottawa

Province: Ontario

Postal Code: K1H 3E7

Country: Canada

Language Preference: English

Work Phone: [ ]

Mobile Phone: [ ]

Fax: [ ]

Email: joe@joesports.ca

3. Complete any missing client contact information; click **Save Insured Details**  
***NOTE:** if the insured's details are completed during quoting, this screen will not appear and you will go directly to Step 2 of the submission process*

# Submitting the Loan

On Line Account Submission Process

Customer Name	Joe's Sports Shop	Total Account	\$21,798.00
Interest Charge Total Due	\$651.24	Amount of Deposit	\$5,100.00
Term (months)	18 Months	Amount of Installment	\$1,725.32

[Back to Step 1](#)

### Step 2: Complete Policy Details

Add Policy / Broker Fee(s)

If applicable, enter amount of Broker Fee or Policy Fee associated with this contract (Not included in the premium amounts)

If applicable, enter amount of Tax on Broker/Policy Fee(s)

Total Broker/Policy Fee(s) + Tax

### Coverage Information

[Cancel Submission](#)

Add Policy Information Below

**Add/Update Policy**

Policy No:  AND/OR

Broker Reference:

Effective Date:

Expiry Date:

Coverage Type:

Premium Cost:

Taxes:

Minimum Earned Premium:  (if amounts earned when policy goes into effect)

Wholesaler:

Carrier:

Additional days to cancel:

For Wholesaler Policies:  
Please select all Insurance Companies Quota process can only continue if percentage is 100%. Click (+) to complete entry.

Carrier	Amount	Percentage	
Auris Canada	10000.00	50.00	<input data-bbox="714 1092 743 1113" type="button" value="(+)"/> Click (+) to add
Allianz (Toronto)	10000.00	50.00	<input data-bbox="801 1120 830 1142" type="button" value="(+)"/> Click (+) to add

Policy Premium Total:

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- Complete Policy Details and click **Save Policy**. For MGA policies, enter the subscribing companies, clicking "+" after each entry

# Submitting the Loan

Summary Dashboard Accounts New Quotes Quote Requests Account Submission List

### On Line Account Submission Process

Customer Name	Joe's Sports Shop	Total Account	\$21,708.00
Interest Charge Total Due:	\$651.24	Amount of Deposit:	\$5,100.00
Term (months):	10 Months	Amount of Installments:	\$1,725.80

5 Step 3

#### Step 2 - Complete Policy Details

Add Policy / Broker Fee(s)  
If applicable, enter amount of Broker Fee or Policy Fee associated with this contract:  
(Not included in the premium amounts) 100.00

If applicable, enter amount of Tax on Broker/Policy Fee(s) 0.00

Total Broker/Policy Fee(s) + Tax 100.00

Policy No.	Effective Date	Carrier	Premium	Tax	Bill Cycle
12345	01-Nov-2014	Strategic Underwriting Managers Inc./Aviva Canada/Altaq (Toronto)	\$20,000.00	\$1,600.00	Bill Cycle

Cancel Submission

#### Add Policy Information Below

Policy No.

Broker Reference

Effective Date: 01-Nov-2014

Expiry Date: 01-Nov-2015

Coverage Type: -- Select One --

Premium Cost: 0.00

Taxes: 0.00

Minimum Earned Premium: 0.00 (3 amounts earned when policy goes into effect)

Wholesaler: -- Select One -- OR

Carrier: -- Select One --

Additional days to cancel: 25

Save Policy Cancel

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- Once all coverage information has been entered, click **Step 3**

# Submitting the Loan

On Line Account Submission Process

Customer Name:	Joe's Sports Shop	Total Account:	\$21,700.00
Interest Charge Total Due:	\$821.24	Amount of Deposit:	\$5,100.00
Term (months):	10 Months	Amount of Instalments:	\$1,725.80

[Back to Step 2](#)

### Step 3: Down Payment, Void Cheque and Account Submission

Your Brokerage is to keep the down payment?  Yes  No  
Note: If you are not collecting the down payment the Brokerage is still responsible for this on file.

Additional amount retained by the brokerage: \*  
\* If applicable, enter the dollar amount that the broker has retained & add this to the downpayment amount.

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#### Complete Void Cheque Information:

Financial Institution:	0004 - TD Canada Trust		
12345	0004	1234567	
Bank Transit	Institution Number:	Account Number:	
<input checked="" type="radio"/> Commercial <input type="radio"/> Personal			
Account Holder Name:	Joe's Sports Shop		

Canadian Check Sample

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Upload image of signed Payment Options Form and Void Cheque

8

Upload image of signed Payment Options Form and Void Cheque

9

Account Submission Note:

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AGENT OR BROKER REPRESENTATIONS

By selecting "Complete On Line Submission" you will be agreeing to the Agent or Broker Representations as outlined in the contract. You further agree that the brokerage has been furnished with these representations and you have the authority to submit this contract and agree to the representations.

You further warrant that the Brokerage has collected the down payment, if applicable, and any other sums due as required by the agreement and is holding same or they are in the process of being collected.

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[Complete On Line Submission](#) [Cancel Submission](#)

6. Confirm down payment and any additional retained amounts
7. Enter insured's banking information
8. Upload copy of the signed Premium Finance Agreement and VOID cheque
9. (Optional) If you have any special instructions, enter a Loan Submission Note
10. No need to sign, email, or fax; simply click to agree to the statement
11. Click **Complete On Line Submission**

# Submitting the Loan

12. Receive confirmation that your contract has been submitted for processing



The screenshot displays the First InSite user interface. At the top left is the logo "First InSite". To the right are links for "Change Password", "Help", "Logout", and "Forgot". Below these is a search bar with fields for "Account #", "Customer Name", and "Policy #", and a "Search" button. A navigation menu contains "Summary Dashboard", "Accounts", "New Quote", "Quote Requests", and "Account Submission List". The main content area shows a confirmation message: "The contract has been submitted for processing. ID # 11677", where "ID # 11677" is circled in yellow. Below the message are two buttons: "Create a New Quote" and "Submit Another Account". The footer includes "Home | Terms & Conditions | Contact Us" and "© 2014 First Insurance Funding of Canada. All rights reserved."



# 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](mailto:clientservices@firstinsurancefunding.ca)

1 888 232 2238