

# First InSite

Managing Accounts

# FirstInSite

## Topics covered in this manual:

1. Managing Accounts
2. Account Funding Details

# Managing Accounts

1. Login to [First Insite](#) - User Name and Password
2. Using the tabs at the top, select **Accounts**, and click on the Account #

1

2

Account #	IC	Company Name	Account Status	Account Submitted By
1180	1188	Car Car	Active	Jack Jones
1181	1185	Sharon's Shoe Store	Active	Sharon McManon
1182	1184	Central Tax Co.	Active	Jack Christopher
1183	1183	Specialist Car Sales	Active	Jack Jones
1184	1183	Adventure Cycling	Active	Jack Christopher
1185	1183	Engelhorn Travel	Active	Jack Jones
1186	1189	Bonnie's Bakery	Active	Mark Resonakis
1187	1185	Advanced Composites	Active	Shelise Edwards
1188	1184	Jennifer's Flower Shop	Active	Jennifer Parford
1189	1181	Jennifer's Flower Shop	Active	Jennifer Parford
1190	1180	Car Car	Active	Jack Jones
1191	1183	Jennifer's Flower Shop	Active	Jennifer Parford
1192	1183	AAA Plumbing	Active	Jack Jones
1193	1187	Jennifer's Flower Shop	Active	Jennifer Parford
1194	1183	JT Remov	Active	Jack Christopher
1195	1184	Jack's Auto	Active	Mark Resonakis
1196	1183	Sunsets BarberShop	Active	Mark Resonakis
1197	1187	Milk Mart	Active	Jack Christopher
1198	1183	EDF Industries	Active	Jack Christopher
1199	1188	Jack's Commerce Store	Active	Joe Micalof

# Managing Accounts

3

A B C D E F

Change Requests for this Account  
(no records returned)

Account Summary

Date	Amount	Account as Balance	Payment Received	Balance	Description
08-Oct-2014	\$4,588.54			\$4,588.54	Loan Set up
06-Oct-2014			(\$458.95)	\$4,129.59	Client Payment

Remaining Scheduled Customer Payments

Date	Description	Amount
01-Nov-2014	Instalment receipt	\$458.95
01-Dec-2014	Instalment receipt	\$458.95
01-Jan-2015	Instalment receipt	\$458.95
01-Feb-2015	Instalment receipt	\$458.95
01-Mar-2015	Instalment receipt	\$458.95
01-Apr-2015	Instalment receipt	\$458.95

3. Once in account profile, brokers have ability to submit:

- (A) Additional Premium Request
- (B) Return Premium Request
- (C) Change address
- (D) Update Banking info
- (E) Print Account Summary
- (F) Review Policy Details



# A) Managing Accounts | AP Request

A

**AP Request**

**Endorsement Request**

Please note: an endorsement cannot be processed if the account is in default.

Contract No:	6274	Endorsement Creation Date:	
Portfolio:	FIRST Insurance Funding of Canada	Customer Name:	Adventure Cycling
Exchange:	FIRST Insurance Brokers Inc.	Balance on account:	\$4,112.00
Effective Date:	01-Sep-2014	Submitted by:	
Status:	Active		

**Endorsement Information**

**Endorsement Creation Date:**

Policy No.	Endorsement Type of Endorsement (See Endorsement)	Limit	Business Calendar Processed	Endorsement Amount
- Select Policy Number -			\$0	\$
			Taxes	\$
			<b>Total Related Premiums</b>	<b>\$0</b>
			<b>Total endorsement</b>	<b>\$0</b>

**Calculate**

Total Endorsement and Taxes:  
Next Installment Date:  
Estimated New Monthly Installment:  
Estimated Interest Charge:

Endorsement collected by:  Broker  FIRST Insurance Funding of Canada

Optional Processing Note:

Endorsement Document (Optional):  None  No file selected

I hereby FIRST Insurance Funding of Canada authorize to process an endorsement in accordance with the above information and further accept this as acknowledgment that we have notified the insured that this amendment forms part of the original Continuous Premium Installment Contract and that we are bound by all the terms and conditions thereof.

**IMPORTANT: L'acceptation et le traitement de cette demande d'adhésion seront soumis à une examination. L'acceptation finale sera confirmée qu'une fois que votre avis d'approbation et d'acceptation de votre société de financement de prime seront délivrés à société de financement prime.**

**Submit Request**

**Back to Account**

(A) Additional Premium Request

- To request additional premium, enter the endorsement details and click **Submit Request**

# B) Managing Accounts | RP Request

B

The screenshot shows a web application interface for an 'RP Request' (Return Premium Request). At the top, there are navigation tabs: 'Summary Dashboard', 'Accounts', 'New Deals', 'Open Requests', and 'Account Submission List'. The main content area is titled 'RP Request' and includes a sub-section 'Endorsement Request'. A note states: 'Please note: an endorsement cannot be processed if the account is in default.' Below this, there are fields for 'Contract No.' (638), 'Policies' (FIRST Insurance Funding of Canada), 'Brokerage' (Best Insurance Brokers Inc.), 'Effective Date' (21-Sep-2014), and 'Status' (Active). Other fields include 'Endorsement Creation Date', 'Customer Name', 'Balance on account' (\$4,102.58), and 'Submitted by'. A section titled 'Endorsement Information' contains a 'Calculate' button and a table for 'Endorsement Details'. The table has columns for 'Policy No.', 'Effective Date of Endorsement (MM/DD/YYYY)', 'Amount', and 'Endorsement Amount'. A summary row shows 'Total Requested Premiums' as 18 and 'Total endorsement' as 18. Below the table, there are fields for 'Expected date of payment to an office (Date of Receipt)' (20-Oct-2014), 'Total Endorsement and Taxes', 'Next Instalment Date', and 'Estimated New Monthly Instalment'. A 'Please Note' section explains that negative endorsements are processed against account balances when payment is received. At the bottom, there is an 'Optional Processing Note' field, an 'Endorsement Document (Optional)' field with a 'Browse...' button, and a checkbox for agreement. A 'Submit Request' button is highlighted with a yellow circle. A 'Back to Account' button is located at the bottom left.

(B) Return Premium Request

- To request a negative endorsement, enter the endorsement details and click **Submit Request**

# C) Managing Accounts | Address Change

(C) Address Change

- To change a client's contact details, enter the updated information and click **Save Insured Details**

**C**

AP Request RP Request Address Change Update Marketing Info Account Summary Policy Detail

### Customer Information Change

**Insured Information**

Customer Name: Adventure Cycling  
Legal Name: Adventure Cycling  
Contact First Name:   
Contact Last Name:   
Industry Classification: Transportation - Other  
Email: info@email.com  
Mailing Address: 7263 Fourth Street  
City: Trenton, Ontario  
Province: Ontario  
Postal Code: M5H 1K4  
Country: Canada  
Language Preference: English  
Mobile Phone: 416-555-1234  
Work Phone: 416-555-1234  
Fax: 416-555-1234

**Physical Address**

Same as above:

Physical Address: 7263 Fourth Street  
City: Trenton, Ontario  
Province: Ontario  
Postal Code: M5H 1K4  
Country: Canada

**Save Insured Details** Cancel

# D) Managing Accounts | Banking Info

**First InSite** Change Password Help Login Logout  
For help call 1-888-232-2238

Account #  Customer Name  Policy #  Search

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

Account Number: 6574 - Adventure Cycling Original Account Details Customer Details

Account Status:	Active
Brokerage:	Best Insurance Brokers Inc.
Submitted by:	Jack Christopher
Portfolio:	FIRST Canada
Balance on account:	\$4,152.08
Past Due Amount(Includes Unpaid Charges):	\$0.00
Unpaid Charges:	\$0.00

[AP Request](#) [IRI Request](#) [Address Change](#) [Update Banking Info](#) [Account Summary](#) [Policy Detail](#)

**D** Update Banking Info

PLEASE ALLOW 24 HOURS FOR YOUR REQUEST TO BE PROCESSED

Financial Institution:

Financial Institution ID#

Bank Transit

Please Re-enter Bank Transit:

Account Number

Please Re-enter Account Number:

Commercial  Personal

Account Holder Name:

Upload Documents:  No file selected

[Banking Information Change](#)

**Canadian Check Sample**

⑆ 8010 ⑆ - 67890123456789010010 ⑆

⑆ 8010 ⑆ | Bank Transit Institution Number | 1579 = 620 ⑆

(D) Update Banking Info

- To change a client's banking information, enter the updated information and upload a void cheque by clicking Browse. Once complete, click on **Banking Information Change**

**Note:** banking changes will take effect approx. 24 hours after submission



# E) Managing Accounts | Account Summary

## (E) Account Summary

- To print an Account Summary, click on **Account Summary** and either open or save a PDF summary

First InSite

Change Password Help Logout LOGIN

For help call 1-888-232-2238

Account # Customer Name Policy # Search

Summary Dashboard Accounts New Quotes Quote Requests Account Submissions List

Account Number: 6574 Adventure Cycling Original Account Details Customer Details

Account Status: Active  
 Brokerage: Best Insurance Brokers Inc.  
 Submitted by: Jack Christopher  
 Portfolio: FIRST Canada  
 Balance on account: \$4,112.59  
 Past Due Amount (includes Unpaid Charges): \$0.00  
 Unpaid Charges: \$0.00

AP Request BP Request Address Change Update Banking Info **Account Summary** Policy Detail

Change Requests for this Account

Loan Number : 6574 Adventure Cycling

7283 Fourth Street  
 Toronto, Ontario, ON, M6H 1K6

Original Loan Details  
 Down Payment: \$913.48  
 Original amount of Installments: \$456.90  
 Date of Monthly Withdrawal: 1  
 Date of First Payment: 01-Oct-2014  
 Acceptance Date: 17-Sep-2014  
 Term (Months): 10 Months

Client Details  
 Client Contact: ---  
 Phone: 416-555-1234  
 Fax: 416-555-1234  
 Email: info@gmail.com

Loan Status: Active  
 Balance on Account: \$4,112.59  
 Past Due Amount (includes Unpaid Charges): \$0.00  
 Unpaid Charges: \$0.00

### Account Summary

Starting Balance Due:	\$4,569.34
Total Premium incl. taxes and any applicable fees:	\$5,323.30
Finance charge:	\$156.79
Total due from client:	\$10,453.02
Down payment collected by broker:	\$913.48
Additional amounts retained by broker:	\$0.00

Date	Amount	Amount in Balance	Payment Received	Balance	Description
08-Oct-2014	\$4,569.34			\$4,569.34	Loan Set up
09-Oct-2014			(\$456.90)	\$4,112.59	Client Payment

### Remaining Scheduled Client Payments

Date	Description	Amount
01-Nov-2014	Installment receipt	\$456.90
01-Dec-2014	Installment receipt	\$456.90
01-Jan-2015	Installment receipt	\$456.90
01-Feb-2015	Installment receipt	\$456.90
01-Mar-2015	Installment receipt	\$456.90
01-Apr-2015	Installment receipt	\$456.90
01-May-2015	Installment receipt	\$456.90
01-Jun-2015	Installment receipt	\$456.90
01-Jul-2015	Installment receipt	\$456.90
01-Aug-2015	Installment receipt	\$456.90

# F) Managing Accounts | Policy Details

The screenshot displays the 'First InSite' user interface. At the top, there are navigation links for 'Change Password', 'Help', and 'Logout'. Below this is a search bar with fields for 'Account #', 'Customer Name', and 'Policy #'. A navigation menu includes 'Summary Dashboard', 'Accounts', 'New Quotes', 'Claims Requests', and 'Account Information List'. The main content area shows account details for 'Adventure Cycling' with an account number of 6574. A yellow circle highlights the 'Policy Detail' button in the navigation bar. Below this, the 'Policy Details' section includes interest disclosure, broker information, and a table of policies.

Policy No.	Broker Reference	Effective Date	Carrier	Coverage Type	Minimum Amount	Premium	Tax	Additional days to cancel
3010		01-Sep-2016	Strategic Underwriting Managers Inc. / UAT Test aka UAT Test Insurance Company of Canada UAT Test Insur Canada	EXCESS AUTO	\$0.00	\$2,500.00	\$0.00	15
501267947		01-Sep-2016	UAT Test Insurance (Mississauga)	GENERAL LIABILITY	\$0.00	\$2,229.00	\$178.32	15

(F) Policy Details

- To review client's policy, click **Policy Detail**

F

# First InSite

Search Account Funding Details

# Account Funding Details

1. Login to [First Insite](#) - User Name and Password
2. In the Summary Dashboard screen, click on **Search Account Funding Details**

The image shows two overlapping screenshots of the First Insite website. The top screenshot shows the homepage with the 'First InSite Login' button circled in yellow and labeled with a '1'. The bottom screenshot shows the 'Summary Dashboard' with the 'Search Account Funding Details' link circled in yellow and labeled with a '2'. The dashboard includes a search bar and a table of account statistics.

Summary Dashboard	
Total Active Accounts:	24
Total Accounts Currently Past Due:	4
Total Accounts Scheduled to Cancel Within the next 3 days:	0
Cancelled Accounts:	2
Renewal Requests:	0
Accounts Eligible for Renewal:	23
Quote Request Status:	1
<a href="#">Search Account Funding Details</a>	



# Account Funding Details

3. Search for account funding details by Funding Status, Portfolio, Start and End dates, or Company Name and click **View**

The screenshot displays the First InSite web application interface. At the top left is the logo "First InSite". To the right are buttons for "Change Password", "Help", "Logout", and "Crossbar". Below these is a search bar with fields for "Account #", "Customer Name", and "Policy #", and a "Search" button. A navigation menu includes "Summary Dashboard", "Accounts", "New Quote", "Quote Requests", and "Account Submission List". The "Summary Dashboard" section shows a list of account statistics: Total Active Accounts (24), 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 (23), and Quote Request Queue (1). A link "Search Account Funding Details" is present. Below this is the "Account Funding Details" section, which is highlighted with a yellow circle and the number "3". It contains search criteria: "Select Funding Status" (Funded), "Select Portfolio" (FIRST Insurance Funding of Canada), "Start Date" (01-Oct-2014), "End Date" (31-Oct-2014), and "Company Name" (empty). A "View" button is circled in yellow.

**3**

Total Active Accounts:	24
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:	23
Quote Request Queue:	1

[Search Account Funding Details](#)

**Account Funding Details**

Select Funding Status :

Select Portfolio :

Start Date :  (dd-Mon-yyyy)

End Date :  (dd-Mon-yyyy)

Company Name :



# Account Funding Details

4. A list will appear below based on your search criteria. Click **Export Account Funding Details** to open and save details in Excel format

The screenshot shows the 'Account Funding Details' web application interface. The search criteria are: Funded, FIBST Insurance Funding of Canada, Start Date: 01-Oct-2014, End Date: 31-Oct-2014, and Company Name. A yellow circle with the number '4' highlights the 'Export Account Funding Details' button. Below the search results is a table with columns: Account #, ID, Company Name, Amount, and Expected Funding Date. The table lists 17 accounts with their respective details.

Account #	ID	Company Name	Amount	Expected Funding Date
2201	11641	Jennifer's Flower Shop	\$20,750.00	10-Oct-14
2202	11637	Jennifer's Flower Shop	\$16,600.00	10-Oct-14
2203	11655	Shantell's Shoe Store	\$16,568.00	10-Oct-14
2204	11630	Sumeets Barbershop	\$18,011.00	10-Oct-14
6675	11635	A1 Service	\$3,306.48	10-Oct-14
6574	11650	Adventure Cycling	\$4,409.84	10-Oct-14
2202	11634	Jacks Auto	\$18,011.00	10-Oct-14
2206	11639	Jennifer's Flower Shop	\$20,000.00	22-Oct-14
6346	11652	Specialized Car Sales	\$10,250.00	22-Oct-14
6499	11656	Care Car	\$4,720.64	22-Oct-14
6693	11610	BDF Industries	\$3,000.00	22-Oct-14
6637	11638	AAA Plumbing	\$5,000.00	22-Oct-14
2202	11644	Jennifer's Flower Shop	\$20,000.00	22-Oct-14
2202	11654	Central Taxi Co	\$20,100.00	22-Oct-14
2202	11640	Care Car	\$20,000.00	22-Oct-14
2202	11649	Exploration Travel	\$6,993.76	27-Oct-14

The Excel export shows the same data in a spreadsheet format with columns A through J. The data is organized into rows 1 through 17, with the first row containing the headers: Account #, ID, Company Name, Amount, and Expected Funding Date.

# 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