

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

First InSite

Processing Renewals

FirstInSite

Topics covered in this manual:

1. Processing Renewals

Processing Renewals

1. Login to [First InSite](#) - User Name and Password
2. To view a list of renewals, click on the number of accounts listed beside Accounts Eligible for Renewal, or perform a search by entering the Loan No., Insured Name, or Policy #

The screenshot displays the First InSite web application interface. At the top left, the logo for "FIRST INSURANCE OF CANADA" is visible, with a red circle containing the number "1" next to the "First InSite Login" button. The main header area includes the "First InSite" logo, a search bar with fields for "Account #", "Customer Name", and "Policy #", and a "Search" button. Below the search bar, there are navigation tabs for "Summary Dashboard", "Accounts", "New Loans", "Loans Suspended", and "Account Information List". The "Summary Dashboard" section is highlighted with a red circle containing the number "2". It features a table with the following data:

Best Insurance Brokers Inc.	
Total Active Accounts:	0
Total Accounts Currently Past Due:	0
Total Accounts Scheduled to Cancel Within the next 3 days:	0
Cancelled Accounts:	2
Renewal Requests:	0
Accounts Eligible for Renewal:	26
Quote Request Queue:	1

At the bottom of the dashboard, there is a link for "Search Account Funding Details". The footer of the page includes "Home | Terms & Conditions | Contact Us" and "© 2014 FIM Insurance Funding of Canada. All rights reserved."

Processing Renewals

The screenshot displays the First InSite interface. At the top, there are navigation links for 'Change Password', 'Help', 'Logout', and 'Admin'. Below this is a search bar with fields for 'Account #', 'Customer Name', and 'Policy #', and a 'Search' button. A navigation menu includes 'Summary Dashboard', 'Accounts', 'New Quotes', 'Delete Brokerage', and 'Account Administration List'. The main section is titled 'Accounts Eligible for Renewal' and contains a search filter box with fields for 'Account #', 'ID', 'Company Name', and 'Broker', along with a 'Search' button. Below the search box is a table with columns: 'Account #', 'ID', 'Renewal', 'Account Number', 'Company Name', 'Account Status', 'Brokerage', 'Broker Name', and 'Portfolio'. A yellow circle highlights the search filter box, and a blue circle highlights the 'Renew' button in the row for account 847. A yellow circle with the number '3' is positioned to the left of the table.

Account #	ID	Renewal	Account Number	Company Name	Account Status	Brokerage	Broker Name	Portfolio
847	10248	Renewal	22-Aug-2013	Cozz R Us	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
854	10265	Renewal	16-Aug-2013	Home Building Supplies	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
847	10245	Renewal	22-Aug-2013	All Service Truck Stop	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
850	10169	Renewal	13-Aug-2013	Luke's Boat Sales	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
830	10168	Renewal	12-Aug-2013	Central Taxi Co	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
838	10163	Renewal	09-Aug-2013	Ace of Clubs Bar and Grill	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
834	10131	Renewal	08-Aug-2013	Thorne Bakery	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
838	10090	Renewal	12-Aug-2013	Foxy Trees & Brokers	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
838	9901	Renewal	26-Jul-2013	Unique Security Solutions	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
827	9826	Renewal	01-Aug-2013	Tony's Limo Service	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
827	9834	Renewal	01-Aug-2013	Electric Bike Delivery BC	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
822	9027	Renewal	31-Jul-2013	Advanced Composites	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
818	9010	Renewal	23-Jul-2013	Sunset Boat Rentals	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
851	9071	Renewal	11-Jul-2013	CompanyName10074	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
850	9026	Renewal	09-Jul-2013	CompanyName10077	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
847	847	Renewal	25-Jun-2013	Sandy's Pet Shop	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
854	9446	Renewal	25-Jun-2013	CompanyName9050	Active	Best Insurance Brokers Inc.	Jack Jones	FIRST Canada
850	8356	Renewal	19-Jun-2013	Sandy's Pet Shop	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada
838	8314	Renewal	17-Jun-2013	CompanyName9012	Active	Best Insurance Brokers Inc.	Jack Christopher	FIRST Canada

3. Locate the contract you wish to renew either by locating the account in the list and clicking **Renew** or by performing a **Search**

Processing Renewals

First InSite Change Password Help Logout

For help call 1-888-232-2238

Account # Customer Name Policy # Search

Summary Dashboard Accounts 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: Melissa D'Nardo

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

Minimum Earned Premium: 5000

Minimum retained policy or broker fee: 100.00

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:

15% or more of the total premium is Directors & Officers coverage: Yes No

Policies are cancellable at short rate or pro rata: Yes No

Policies are fully earned on event: Yes No

Policies are part of a master policy: Yes No

Policies are earned at an accelerated rate (e.g. Motorcycle): Yes No

Broker of record is your brokerage: Yes No

Insured is in bankruptcy: Yes No

Customer is a farm in Alberta: Yes No

Customer is a fishery in Prince Edward Island: Yes No

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4. Enter/confirm the policy premium information
NOTE: be sure to put a value in minimum retained field, even if "0"

5. Review the pre-selected list of questions and click **Next**

Processing Renewals

First InSite

Account #: _____ Customer Name: _____ Policy #: _____ Search

Summary Dashboard Accounts Renew Quotes Quotes 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: \$6.00
 Total Invoice Amount: \$21,706.00
 Effective Date: 10-Jul-2014
 Minimum Earned Premiums*: \$5,000.00
 Minimum retained policy or broker fee: ** \$100.00
 Facility coverage: No

Select Portfolio: FIRST Insurance Funding of Canada
 Select Pricing Program: 17 & 10 12 Equal 20 & 9
 Coverage: Commercial Personal Line
 Customer Monthly Withdrawal Date: Effective Day
 Date of First Monthly Withdrawal: 10-Aug-2014

Rate Calculate or Increase Down Payment

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

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

Coverage Information

Send Contract document to Brokerage Contact: melissa.dunlop@bestinsurance.ca
 Send to: _____

Back Proceed with Renewal Submission Save and Print Renewal Summary Close

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

6. Select **Pricing Program**

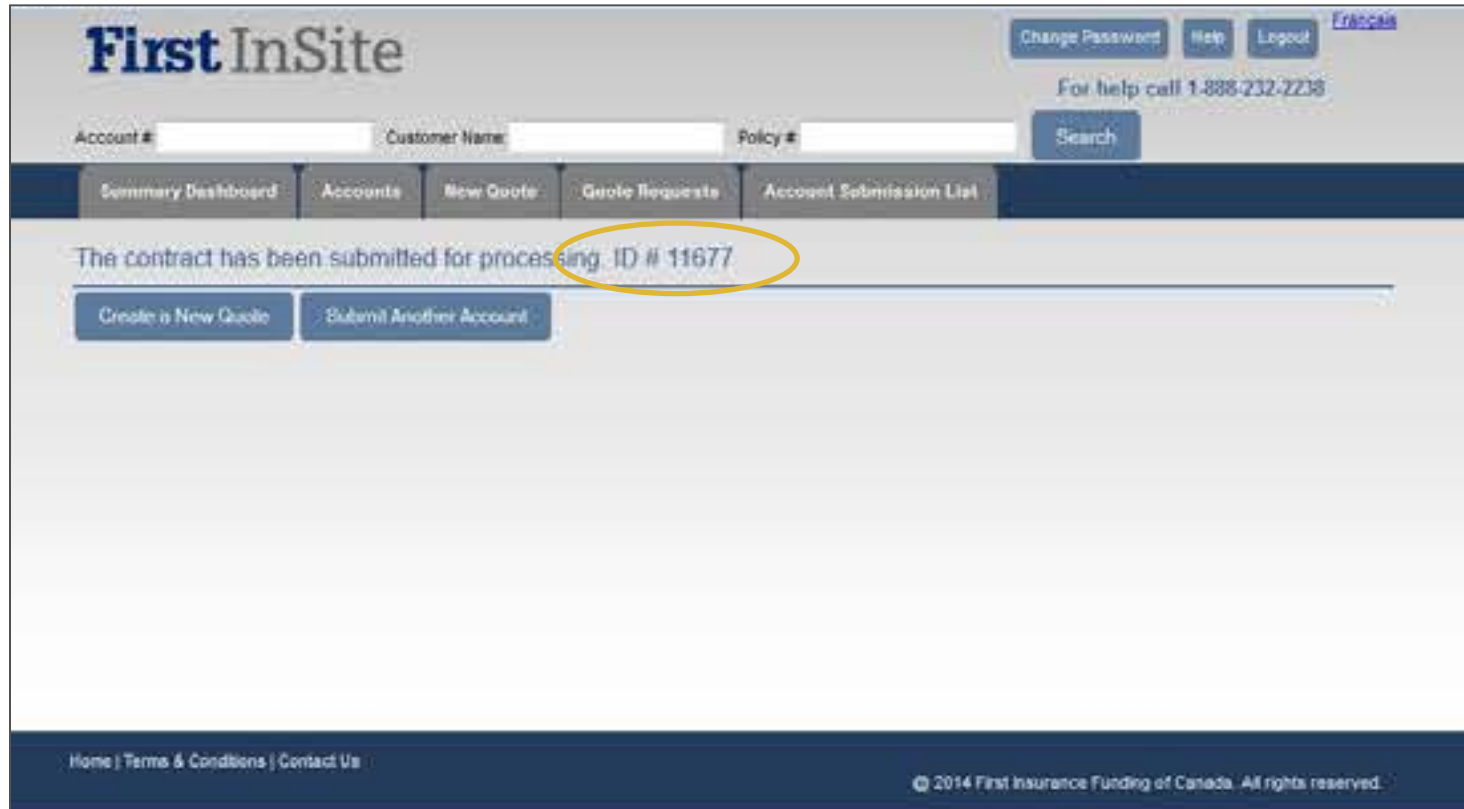
7. Click **Rate Calculate or Increase Down Payment** for rate calculator

8. Optional Coverage Information fields
Note: optional at this stage. Can be completed upon client acceptance

9. Broker can either:
 (A) **Proceed with Renewal Submission**
 or (B) **Save and Print Renewal Summary**

(A) Proceed with Renewal Submission

11. Confirmation that your Renewal 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 features 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."

(B) Print and Save Option

Invoice Payment Options				
Insured: Joe's Sports Shop 10069 Third Ave Ottawa, ON, K6H 3B7 Tel: (613) 555-1212	Policy Payments ID 140000939 Account No. JOESS-1 Invoice Date September 18, 2014 Balance Due \$21,708.00 Currency CDN			
Please return payment or signed form so as not to affect your coverage. Please mail to: Best Insurance Brokers Inc. 4490 Second Street Ottawa, ON, K6H 3B7 Tel: (613) 555-1212				
A. Payment in Full				
Send cheque or money order for \$21,708.00. Make all cheques payable to Best Insurance Brokers Inc.. Payment is due the effective date of the insurance coverage.				
B. Credit Card				
To complete your payment by credit card go to http://69.172.64.219/PolicyPayments/Best and enter ID: 140000939 and follow directions on screen. An administration fee may apply.				
C. Monthly Instalments – PLEASE READ THE ATTACHED AGREEMENT AND SIGN WHERE INDICATED				
TOTAL PREMIUMS INCL TAX	DOWN PAYMENT	10 MONTHLY INSTALLMENTS OF	FINANCE CHARGE	FLAT RATE
\$21,708.00	\$5,100.00	\$1,725.92	\$651.24	3.00%

No client signature is required for renewal

NOTE: *this does not mean your renewal is submitted.*

Login to firstinsite.ca to submit the renewal

(B) Print and Save Option | Renewal Submission

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 image shows two overlapping screenshots of the First Insite web application. The top-left screenshot shows the homepage with a 'First InSite Login' button circled in yellow and a '1' in a yellow circle. The bottom-right screenshot shows the 'Account Submission List' page with the 'Account Submission List' tab circled in yellow and a '2' in a yellow circle. The page displays a table of pending submissions with columns for ID, Date, Issuance, Renewal #, Equipment Name, Total Amount, Status, and a 'Submit Account' button circled in yellow for the first row.

ID	Date	Issuance	Renewal #	Equipment Name	Total Amount	Status	Submit Account	Device Qualifier	True	PG	Comments
140000081	18-Sep-2014	Best Insurance Brokers Inc.	JOE55-1	Joe's Sports Shop	\$21,700.00	Pending	Submit Account	Device Qualifier	True	PG	FIRST Canada
140000080	18-Sep-2014	Best Insurance Brokers Inc.	JOE55-1	Joe's Sports Shop	\$21,700.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada
140000079	18-Sep-2014	Best Insurance Brokers Inc.	WENGA1	Advanced Composite	\$20,000.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada
140000078	18-Sep-2014	Best Insurance Brokers Inc.	JOE55-1	Joe's Sports Shop	\$21,700.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada
140000076	18-Sep-2014	Best Insurance Brokers Inc.	JOE55-1	Joe's Sports Shop	\$21,700.00	Pending	Submit Account	Device Qualifier	True	PG	FIRST Canada
140000074	18-Sep-2014	Best Insurance Brokers Inc.	JOE55-1	Joe's Sports Shop	\$21,700.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada
140000073	18-Sep-2014	Best Insurance Brokers Inc.	TBC	McDonalds	\$12,000.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada
140000072	17-Sep-2014	Best Insurance Brokers Inc.	Wa	Shantel's shoe store	\$20,100.00	Pending	Submit Account	Device Qualifier	False	PG	FIRST Canada

(B) Print and Save Option | Renewal Submission

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:	\$1,726.00

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:

Policy No.	Effective Date	Carrier	Premium	Tax	Rate
12345	01-Nov-2014	Strategic Underwriting Managers Inc. / Aviva Canada/Alberta (Toronto)	\$20,000.00	\$1,600.00	8.00 2014

Cancel Submission

Add Policy Information Below:

Add/Update Policy

Policy No:

Broker Reference:

Effective Date:

Expiry Date:

Coverage Type:

Premium Cost:

Taxes:

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

Wholesaler: OR

Carrier:

Additional days to cancel:

3. Confirm/complete policy details if necessary
NOTE: for MGA policies, premium breakdown is required
4. Once all policy information has been entered, click **Step 3**

(B) Print and Save Option | Renewal Submission

First InSite Change Password Web Login Logout
For help call 1-888-232-2228

Account # Customer Name Policy # Search

Summary Dashboard Accounts New Quotes Quotes Received Account Submission List

On Line Account Submission Process

Customer Name:	Joe's Sports Shop	Total Account:	\$21,708.00
Interest Charge Total Due:	\$851.24	Amount of Deposit:	\$5,100.00
Term (months):	18 Months	Amount of Installments:	\$1,729.92

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 the on risk.

Additional amount retained by the brokerage: *
* If applicable, enter the dollar amount that the broker has retained (e.g. \$2000) to the downpayment amount.

Void Cheque Information:

Financial Institution:	0004 - TD Canada Trust	
12045	0004	1224
Bank Transit	Institution Number	Account Number
Commercial		

Account Holder Name: test

Update Customer Banking Information

Account Submission Note:

A note is only necessary if you would like to communicate something specific about the contract to the FIRST Insurance Funding service team.

AGENT OR BROKER REPRESENTATIONS
By selecting "Complete On Line Submission" you warrant and agree to the Agent or Broker Representations as outlined in the contract. You further agree that the brokerage has been furnished with Power of Attorney and you have the authority to submit this contract renewal request 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 retained with this agreement.

Complete On Line Submission Cancel Submission

5. Review Client Banking Information and Update (with void cheque) if required
6. No need to print and sign – simply click to agree to the statement
7. Click **Complete On Line Submission**

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Banking info carries through

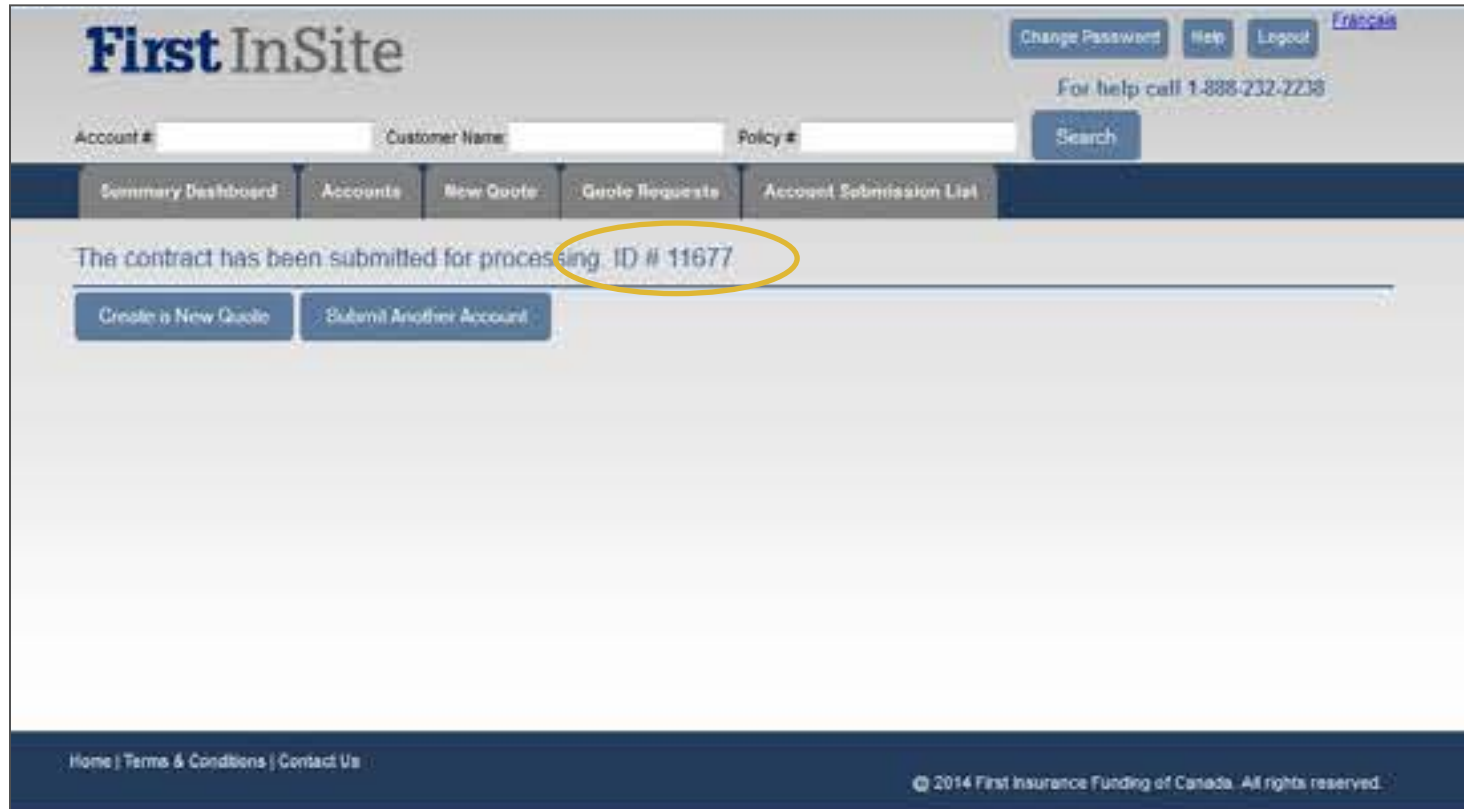
Update banking info if necessary

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(B) Print and Save Option | Renewal Submission

8. Confirmation that your Renewal has been submitted for processing



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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