

First InSite *Enhanced*™

FAQ

1

Why is First InSite™ changing?

We are expanding the functionality of First InSite™ as part of our commitment to deliver on our innovation promise. First InSite Enhanced™ will equip you with the ability to easily and conveniently offer payment options and now also includes eSignatures, integrated credit card payments, paperless workflows, and reporting.

This new platform will also allow us to more easily provide technological improvements in the future, like integrations and more

2

Are there specific system requirements to use First InSite Enhanced™?

First InSite Enhanced™ is cloud based and independent of your operating system and browser.

3

Will training be provided? What if I have additional questions?

Contact your **Relationship Manager** and they will be happy to provide in-office training

4

How do I access First InSite Enhanced™?

You can login by visiting **firstinsurancefunding.ca** and clicking on the First InSite Enhanced™ button on the top of our home page.

Be sure to update any bookmarks or shortcuts prior to entering your login information. Reminder, your username is your email address.

5

What if my client wants to receive their documents in French?

You can provide your client documentation in French, simply select "Français" in the Preferred Language field during the quoting process.

6

Will my renewals be available in First InSite Enhanced™?

Yes. Your renewals will be in First InSite Enhanced™ and can be easily searched by account number or client name.

Renewals are evergreen so don't require your clients' signature.

7

How can I get a U.S. Currency Quote?

Call your **Account Manager** and they will be happy to help you.

8

How can I process a Returned Premium (Negative Endorsement)?

To process a negative endorsement, mail us a cheque with a cover note, including client's name and account number.