

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

First InSite *Enhanced*

Account Management

Account Management

Topics covered in this guide:

- › Account Management
- › Bank Account Updates
- › Disbursements
- › Documents
- › Tips

Login

- > Click on the **First InSite Enhanced login button**
firstinsurancefunding.ca
- > Login with your user name (email address) and password
- > Select **Accounts**

The screenshot displays the First InSite Enhanced website. At the top, there is a navigation bar with a "Login here" link and a "First InSite Enhanced" button highlighted with a yellow border. To the right of the navigation bar are social media icons for LinkedIn, Twitter, Email, and Google+, along with language options for "First-U.S. English" and "Contact Us Français". Below the navigation bar is a main content area with a dark blue header containing "Home", "Quoting", "Contact Us", and "New Window" links. The main content area features a large background image of a mountain range. In the center, there is a "QUICK SEARCH" section with two search boxes: "Account Search" and "Quote Search", each with a magnifying glass icon. To the right of the search section is a "QUICK LINKS" section with four buttons: "Additional Premium Quote", "Additional Premium Quote Search", "Reports", and "Complete Quote". At the bottom of the page, there are three icons: "QUOTES" (calculator and pencil), "ACCOUNTS" (three people icons, highlighted with a yellow border), and "RENEWALS" (calendar and document icon).

- > Enter in search criteria and click **Search**
- > Click on the account you wish to access

Client Status - Search

Account #: Name: Serial #:

Address: City: Policy #:

Region: Postal Code: Pymt Amt Rcvd:

Customer ID: Quote #:

Include Archived Accounts


[Advanced...](#) [Search](#)

Account No +	Name	Address	City	Region	APs
901-30544	BMS Renewal Test	20 Toronto St	Toronto	ON	0
901-28407	14814 Test SC	123 here st	Toronto	ON	0
901-28399	14814 Test SC	123 here st	Toronto	ON	0
901-28381	14814 Test SC	123 here st	Toronto	ON	0
901-27748	Krusty the Clown	123 Springfield	Springfield	ON	0
901-27474	BMS Link Renewal Test 2	123 Any Street	Toronto	ON	0
901-27466	BMS Renewal Test	123 Any Street	Toronto	ON	0
901-19638	XYZ	1 Main St.	Toronto	ON	1
901-13615	Studio 7 Ltd.	123 St	Hamilton	ON	1
901-13235	ABC Company	123 St	Hamilton	ON	0

Account Summary

- › The Summary tab provides a dashboard of the client's account
- › It is comprised of:
 - › Customer Information
 - › Summary Financials

Client Status - 901-116426 - Pet Supplies and Co.

Account Number: 901-116426 Account Name: Pet Supplies and Co. Current / Active 

Summary Customer Policies Terms Disbursements Posted Payments Documents Notice Delivery

Manual EFT Payments Scheduled CC Payments

Customer Information		Summary Financials	
Private Label:	Best Insurance Brokers Inc.	Total Premium:	5,000.00
Account Number:	116426	Down Payment: (10.000%)	500.00
Account Holder:	Pet Supplies and Co.	Amount Financed:	4,500.00
Main Address:	2020 Hindsight Avenue London, ON L1L 2M2	Non-Refundable Fee:	0.00
Brokerage:	A00014 - Best Insurance Brokers Inc. - Toronto	Finance Charge:	258.40
Main Phone:	(905) 123-4567	Total of Payments:	4,758.40
Broker Contact:	Test User	No. of Installments:	10
Broker Phone:	8443403700	Installment Amount:	475.84
Broker Email:	uat@firstinsurancefunding.ca	APR:	12.339%
Customer ID:	1234	Flat Rate:	5.168%
Received Date:	--	Installments Made/Remaining:	0 / 10
Creation Date:	09/03/2029	Next Installment Amount:	475.84
Created By:	PBS System	Next Late Fee Amount:	23.79
Effective Date:	09/03/2029	Shortage:	0.00
Archive Date:	--	Auto Assessed Late Fee Breakdown	
Balance Due Date:	--	Account Balance (inc. fees):	4,758.40
Next Intent Date:	10/04/2029	Current Amount Due:	0.00
Scheduled Cancellation Date:	12/04/2029		
Cancellation Hold Date:	--		
Manual Cancellation Date:	--		
Next Reinstatement Date:	--		
Next Late Fee Date:	10/04/2029		
First Payment Due Date:	09/04/2029	Last Intent Date:	--
Next Payment Due Date:	09/04/2029	Last Cancellation Date:	--
Final Payment Due Date:	09/01/2030	Last Reinstatement Date:	--

Account Summary

- Summary tab provides a dashboard of the client's account
- Click **Account Options** drop down to view or print Customer Account History, Report or to view Payment Schedule

Client Status - 901-13235 - ABC Company

Account Number: 901-13235 Account Name: ABC Company Current / Flatted

Summary Customer Policies Terms Disbursements Documents Notice Delivery Manual EFT Payments

Customer Information

Account Number: 13235
 Account Holder: ABC Company
 Main Address: 123 St
 Hamilton, ON L0L 0L0
 Main Phone: (111) 111-1111
 Home Phone: (111) 111-1111
 Brokerage: A00034 - Best Insurance Brokers Inc. - Ottawa
 Broker Contact: Best Broker
 Broker Phone: (416) 216-1773
 Broker Email: uat@firstinsurancefunding.ca
 Customer ID: XYZ 1234

Summary Financials

Total Premium: 10,900.00
 Down Payment: (17.000%) 1,936.00
 Amount Financed: 8,964.00
 Non-Refundable Fee: 0.00
 Finance Charge: 283.40
 Total of Payments: 9,247.40
 No. of Installments: 10
 Installment Amount: 924.74
 APR: 6.840 %
 Flat Rate: 2.600 %
 Installments Made/Remaining: 6 / 4
 Next Installment Amount: 924.74
 Next Late Fee Amount: N/A
 Overage: 283.40

Auto Assessed Late Fee Breakdown

Account Balance (inc. fees): 3,415.56
 Current Amount Due: 3,415.56

Received Date: --
 Creation Date: 16/02/2023
 Created By: Bree
 Effective Date: 12/10/2022
 Archive Date: --
 Balance Due Date: --

Next Intent Date: 06/12/2023
 Scheduled Cancellation Date: 21/12/2023
 Cancellation Hold Date: --
 Manual Cancellation Date: --
 Next Reinstatement Date: --
 Next Late Fee Date: --

First Payment Due Date: 12/11/2022
 Next Payment Due Date: 12/05/2023
 Final Payment Due Date: 12/08/2023

Last Intent Date: --
 Last Cancellation Date: --
 Last Reinstatement Date: --

Account Options... Edit Close

- Account Options...
- Customer Account History ...
- Debug Customer Account ...
- View Payment Schedule

Customer Account History Report

documents, pressing <Ctrl> + 7 will show/hide the File menu

Customer Account History Report

Filters: Account Number: 13235
 Requested by: Sarah Smith
 Current / Flatted

Account Number: 901-13235
 Account Holder: ABC Company
 Main Address: 123 St
 Hamilton, ON L0L 0L0
 Main Phone: (111) 111-1111
 Brokerage: A00034 - Best Insurance Brokers Inc. - Ottawa
 Main Address: 4480 Second Street
 Ottawa, ON K6H 3B7

Summary Financials

Total Premium: 10,900.00
 Down Payment: 17,000 1,936.00
 Amount Financed: 8,964.00
 Non-Refundable Fee: 0.00
 Finance Charge: 283.40
 Total of Payments: 9,247.40
 No. of Installments: 10
 Installment Amount: 924.74
 APR: 6.840 %
 Installments Made/Remaining: 6 / 4
 Next Installment Amount: 924.74

Client Status - 901-13235 - ABC Company

Account Number: 901-13235 Account Name: ABC Company Current / Flatted

Summary Customer Policies Terms Disbursements Documents Notice Delivery Manual EFT Payments

Installment Schedule

#	Due Date	Late Fee Date	Payment Applied	Installment Amount	Adjustment	Original Loan
1	12/11/2022	22/02/2023	16/02/2023	924.74		924.74
2	12/12/2022	22/02/2023	16/02/2023	924.74		924.74
3	12/01/2023	22/02/2023	16/02/2023	924.74		924.74
4	12/02/2023	22/02/2023	16/02/2023	924.74		924.74
5	12/03/2023	17/03/2023	13/03/2023	924.74		924.74
6	12/04/2023	17/04/2023	12/04/2023	924.74		924.74
7	12/05/2023	17/05/2023		924.74		924.74
8	12/06/2023	17/06/2023		924.74		924.74
9	12/07/2023	17/07/2023		924.74		924.74
10	12/08/2023	17/08/2023		924.74		924.74

9,247.40 0.00 9,247.40


Close

Payment Schedule

Customer

- > The Customer tab allows you to view and edit customer details
- > You can enter an email address here and choose to email notices to your client


Client Status - 901-13235 - ABC Company

Account Number: 901-13235 Account Name: ABC Company Current / Flatted 

Summary **Customer** Policies Terms Disbursements Documents Notice Delivery Manual EFT Payments

From Quote: 71910
Submitted By: A00034 - Best Insurance Brokers Inc. - Ottawa

Name & Address		Contact	
Name:	ABC Company	Main Phone:	(111) 111-1111
		Contact:	
		E-Mail:	t@test.ca
Address:	123 St	Main Fax:	
		Home Phone:	(111) 111-1111
		Create:	
City:	Hamilton		
Country:	Canada		
Province / Postal:	ON - Ontario	L0L 0L0	
	View/Edit Addresses		
Email Notices:	<input type="checkbox"/>		
Broker Contact:	BestBroker.ca - Best Broker		
Broker Phone:	(416) 216-1773		
Broker Email:	uat@firstinsurancefunding.ca		

Account Options...  [Edit](#) [Close](#)

Updating Client Banking Information

- › The **Terms** tab allows you to view loan details
- › You can submit a request to update your client's banking information
- › Click Edit

Client Status - 901-116426 - Pet Supplies and Co.

Account Number: 901-116426 Account Name: Pet Supplies and Co. Current / Active

Summary Customer Policies **Terms** Disbursements Posted Payments Documents Notice Delivery

Manual EFT Payments Scheduled CC Payments

Governing Province: Ontario Fee Method: Finance Charge

Billing Cycle: Monthly Billing Method: Credit Card

ACH Information

Bank Name:

Routing Number:

New Account Number:

Account Type:

ACH Hold:

Next ACH Date:

Banking Information

Bank Name:

Routing Number:

Original Loan (No Additional Premiums)

Payment(s) Retained by Brokerage:	0.00	APR:	12.339%
Down Payment Retained by Brokerage:	0.00	Flat Rate:	5.168%
Total Retained by Brokerage:	0.00	Application Fee:	0.00
Down Payment Retained by FIRST:	0.00	Non-Refundable Broker Fee:	0.00
Down Payment to CC:	500.00	Financed Broker Fee:	0.00
Effective Date:	09/03/2029	Total Premium:	5,000.00
Accrued Interest:	34.73	Down Payment:	10.000% 500.00
Deferred Interest:	223.67	Amount Financed:	4,500.00
Interest Refunded:	0.00	Non-Refundable Fee:	0.00
		Finance Charge:	258.40
		Total of Payments:	4,758.40
		No. of Installments:	10
		Installment Amount:	475.84
		First Payment Due Date:	09/04/2029

Account Options... Edit Close

Updating Client Banking Information

› Enter the following:

- › Bank Name
- › Routing Number
- › Account Number

› Click Upload Void Cheque or PAD Form

- › The ACH Authorization (Pre-Authorized Payment) Form can be generated on the Documents tab

› Click Set

Client Status - 901-116426 - Pet Supplies and Co.

Account Number: 901-116426	Account Name: Pet Supplies and Co.	Current / Active					
Summary	Customer	Policies	Terms	Disbursements	Posted Payments	Documents	Notice Delivery
Manual EFT Payments	Scheduled CC Payments						
Governing Province:	Ontario	Fee Method:	Finance Charge				
Billing Cycle:	Monthly	Billing Method:	Credit Card				
ACH Information							
Bank Name:	<input type="text"/>						
Routing Number:	<input type="text"/>						
New Account Number:	<input type="text"/>						
Account Type:	<input type="text"/>						
ACH Hold:	<input type="checkbox"/>						
Next ACH Date:	<input type="text"/>						
Banking Information							
Bank Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Routing Number:	<input type="text"/>						
New Account Number:	<input type="text"/>						
				Upload Void Cheque or PAD Form			Set
The name of the account holder must be the same as the client. If it is not, please generate the ACH Authorization form under the account Documents tab to complete.							

Updating Client Banking Information

- › Click Save
- › Review the confirmation message and click OK
- › The file uploaded will be visible on the account's Documents tab and labeled as ACH Request
- › The banking information change will be applied once verified by our team

Banking Information

Bank Name: Upload Void Cheque or PAD Form Set

Routing Number: 📄

New Account Number:

The name of the account holder must be the same as the client. If it is not, please generate the ACH Authorization form under the account Documents tab to complete.

ACH AUTHORIZATION FORM

Original Loan (No Additional Premiums)

Payment(s) Retained by Brokerage:	<input type="text" value="0.00"/>	APR:	<input type="text" value="12.339%"/>
Down Payment Retained by Brokerage:	<input type="text" value="0.00"/>	Flat Rate:	<input type="text" value="5.168%"/>
Total Retained by Brokerage:	<input type="text" value="0.00"/>	Application Fee:	<input type="text" value="0.00"/>
Down Payment Retained by FIRST:	<input type="text" value="0.00"/>	Non-Refundable Broker Fee:	<input type="text" value="0.00"/>
Down Payment to CC:	<input type="text" value="500.00"/>	Financed Broker Fee:	<input type="text" value="0.00"/>
Effective Date:	<input type="text" value="09/03/2029"/>	Total Premium:	<input type="text" value="5,000.00"/>
Accrued Interest:	<input type="text" value="34.73"/>	Down Payment:	<input type="text" value="10.000%"/> <input type="text" value="500.00"/>
Deferred Interest:	<input type="text" value="223.67"/>	Amount Financed:	<input type="text" value="4,500.00"/>
Interest Refunded:	<input type="text" value="0.00"/>	Non-Refundable Fee:	<input type="text" value="0.00"/>
		Finance Charge:	<input type="text" value="258.40"/>
		Total of Payments:	<input type="text" value="4,758.40"/>
		No. of Installments:	<input type="text" value="10"/>
		Installment Amount:	<input type="text" value="475.84"/>
		First Payment Due Date:	<input type="text" value="09/04/2029"/>

Save Cancel

pbs.first-quotes.com says

Your request to change your client's banking information was submitted for review. You will receive confirmation within the next two business days.

OK

Disbursements – Broker Funding

- > Disbursements tab outlines broker funding details
- > View the status of funding (Paid, Unpaid) and the expected funding date

Client Status - 901-13235 - ABC Company

Account Number: 901-13235 Account Name: ABC Company Current / Flatted **F**

Summary Customer Policies Terms **Disbursements** Documents Notice Delivery Manual EFT Payments

[Back to Disbursement List](#)

Disbursement Details (1 of 1)

Payee: A00034 - Best Insurance Brokers Inc. - Ottawa

Amount: 5,265.04 Status: Paid

Type: Original Release Date**: 16/02/2023

Method: EFT Disbursed Date: 16/02/2023

Bank Account Code: A00034-1 Cleared Date: 16/02/2023

Serial Number: 10805

Do Not Hold for Down Payments or Installments:

Policies for assigned loan only:

<input type="checkbox"/>	Loan	Policy #	Carrier	MGA	Coverage	Premium
<input checked="" type="checkbox"/>	Original	tba	Aviva Canada		EQUIPMENT	10,000.00

Holds: Value: Add

Hold Type	Value
No holds defined.	

** Please note, the release date is an anticipated date and subject to change. The date disbursed is the actual date of the disbursement.

Edit Close

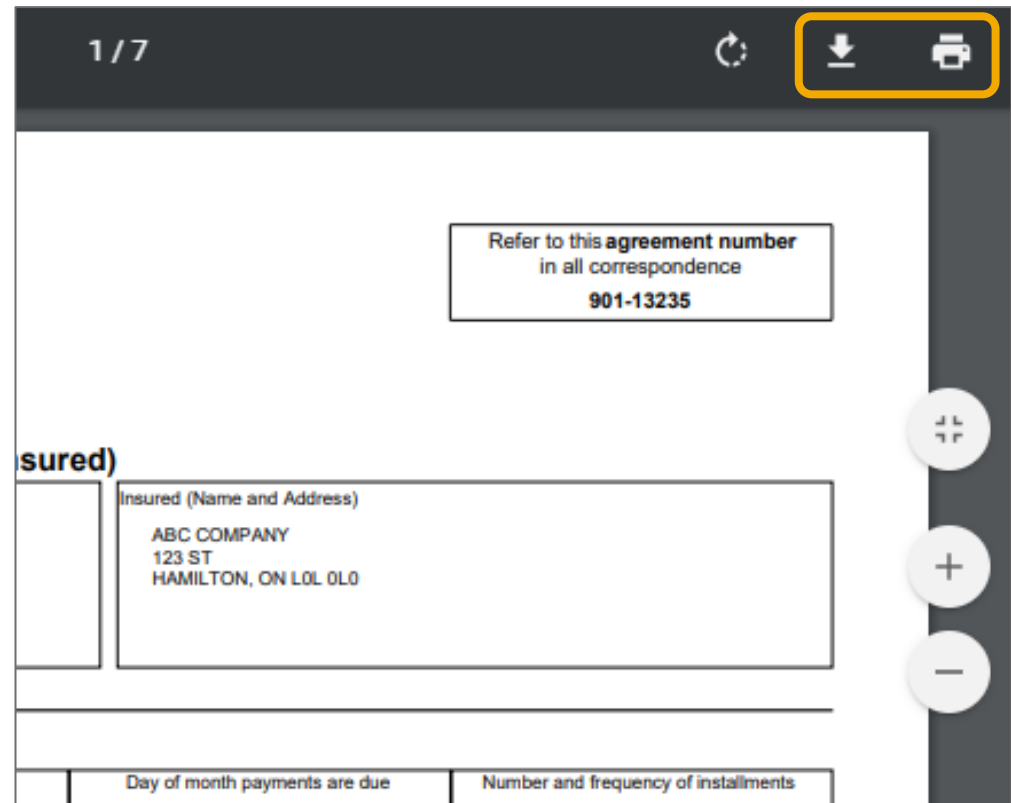
Account Options... Edit Close

Documents

- > Select the Documents tab to view and print documents pertaining to an account
- > Click on document you wish to view
- > The document will open automatically
- > Choose to either view, save, or print the document

Client Status - 901-13235 - ABC Company

Account Number: 901-13235	Account Name: ABC Company	Current / Flatted					
Summary	Customer	Policies	Terms	Disbursements	Documents	Notice Delivery	Manual EFT Payments
Title	Description	Method	Date Created	Pages			
Notice of Rescission		Day End	27/04/2023	5			
Notice of Financed Premium		Day End	16/02/2023	1			
Notice of Acceptance		Day End	16/02/2023	7			



Contact Us

Contact a member of your dedicated service and support team with questions or you can reach us at:

clientservices@firstinsurancefunding.ca

1 888 232 2238