



FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY



FirstInSite Lite™
Accounts



Topics covered in this guide

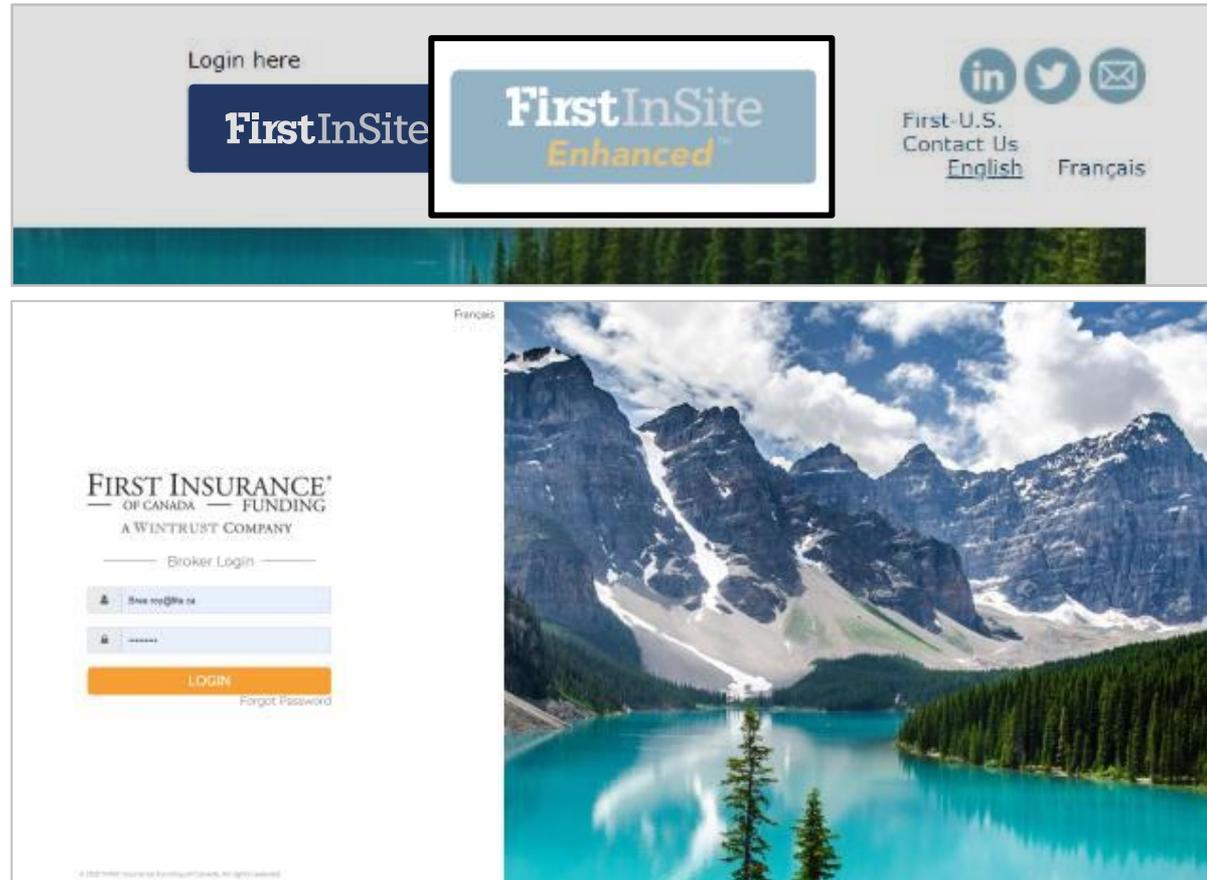
- › Clients
- › Policies
- › Disbursements
- › Documents
- › Tips



FirstInSite Lite™

Log in to First InSite Lite™

- › Click on the **First InSite Enhanced login button** on the firstinsurancefunding.ca home page
- › Login with your user name (email address) and temporary password provided in your welcome email

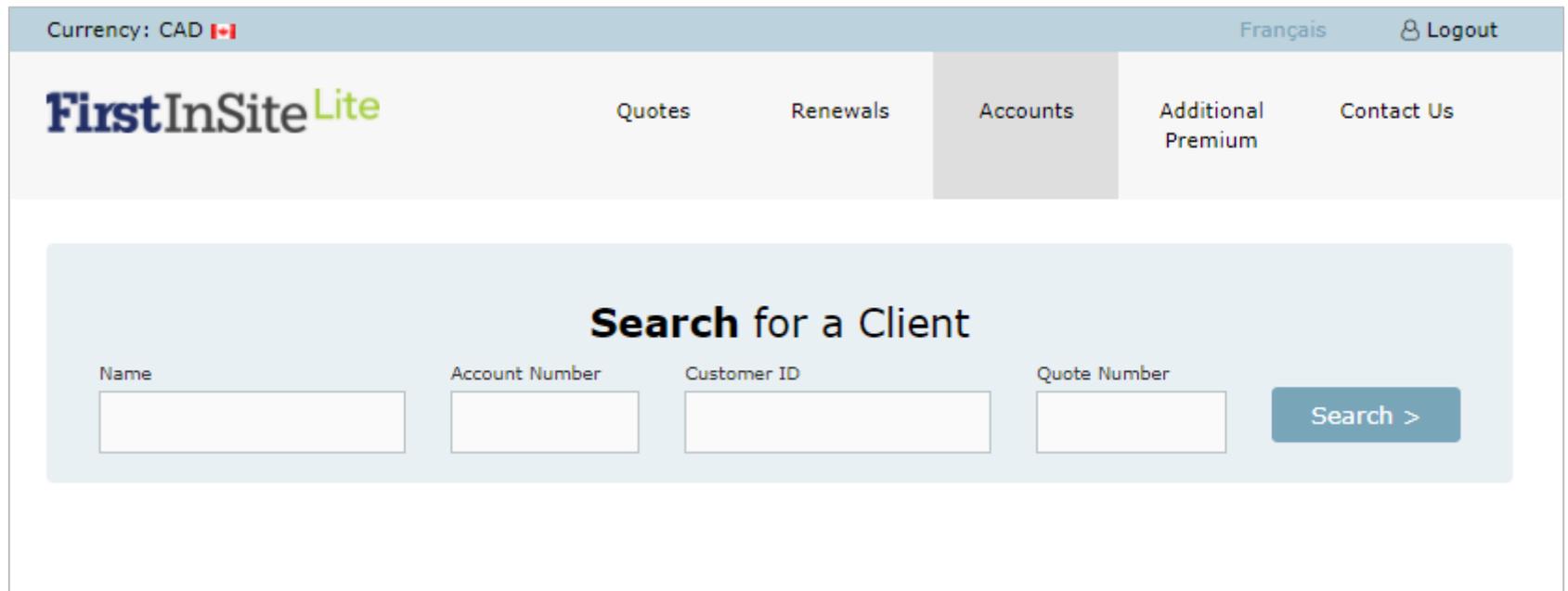




Accounts

Accounts

- › Click on **Accounts** in the top menu bar
- › Search for a client by entering any of the information and click **Search**



The screenshot displays the 'Accounts' section of the FirstInSite Lite web application. At the top, the currency is set to CAD with a Canadian flag icon, and the language is set to Français. A 'Logout' button is visible in the top right corner. The main navigation bar includes links for 'Quotes', 'Renewals', 'Accounts' (which is highlighted), 'Additional Premium', and 'Contact Us'. Below the navigation bar, a search form titled 'Search for a Client' is presented. This form contains four input fields labeled 'Name', 'Account Number', 'Customer ID', and 'Quote Number'. A 'Search >' button is positioned to the right of these fields.

Accounts

- › A list of matching accounts up will display. Select the account you wish to view by clicking on that row

Search for a Client

Name

Account Number

Customer ID

Quote Number

Search >

Account Number	Name	Address	City	Region	Broker Contact
1230	Sam's Grocery Store	12 Smith Road	Toronto	ON	Jennifer Davis
935	Bob Smith	123 Road	Toronto	ON	Jennifer Davis
109	MFC Industrial Ltd., MFC Energy Corporation, MFC R	400, 1035 - 7 Avenue SW	Calgary	AB	Jennifer Davis

3 items

Client Tab

- › You can update select information:
 - › Client's contact name
 - › Broker Reference ID
 - › Document language
- › You can add or edit your client's email address and phone number
- › You can choose to email documents to your client (instead of by mail)
- › Click **Save**

The screenshot shows the 'FirstInSite Lite' interface with a 'Quotes' tab. The form is titled 'Client Tab' and contains the following fields and options:

- Company Name:** 12 policies
- Contact Name:** Best Client
- Account Number:** 1446
- Broker Reference:** BST123
- Document Language:** English (dropdown menu)
- Address:** 12 policy lane
- City:** Toronto
- Province:** ON (dropdown menu)
- Postal Code:** L1L 1L1
- Country:** CA
- Email:** (empty text box)
- Phone Number:** (empty text box)
- Email Notices:** Radio buttons for Yes and No, with 'No' selected.

A **Save** button is located at the bottom right of the form.

Client Tab

- › You can produce a payment schedule for your client which can be printed or emailed

Installments Made	3
Installments Remaining	8
Next Installment Amount	1,060.90
Next Installment Date	24/09/2017
Account Balance	8,487.20
Current Amount Due	0.00

Payment Schedule

[View/Print Payment Schedule](#)

Policies Tab

- › A look-up screen for existing policies for that client

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals Accounts Additional Premium Contact Us

Account Number 10249

Client Policies Disbursements Documents

Policy List X

Policy Number	123	Loan:	Original Loan	Coverage:	PENG - PENGUIN
		Effective Date:	11/02/2021 (12 months)	Insurance Carrier:	C00006 - Chubb Insurance - TOR
		Premium:	1,500.00	MGA:	
		Total Premium:	1,500.00		

1 items

Disbursements Tab

- › You can view dates for when the disbursement will be released

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals **Accounts** Additional Premium Contact Us

Account Number 10249

[Client](#) [Policies](#) **[Disbursements](#)** [Documents](#)

Disbursements

Type:	Original	Scheduled Funding	13/03/2021
Status:	Unpaid	Date:	
		Actual Funding Date:	1,500.00
		Funding Amount:	
		Total:	1,500.00

1 items

Documents Tab

- › View and reprint a list of documents that have been generated for this account

Currency: CAD  Français  Logout

FirstInSite Lite Quotes Renewals Accounts Additional Premium Contact Us

Account Number 10249

Client Policies Disbursements Documents

Documents

Type	Date Created	Pages	Reprint
Notice of Acceptance	22/02/2021	4	Reprint
Notice of Acceptance	22/02/2021	4	Reprint

2 items

Tips

1. Your login is the same as First InSite Enhanced™ (your email address). If you're a new user, your login credentials will be emailed to you within 5 business days of training
2. After initial login you will be required to create a password. This password must be 8 characters and include numbers, special characters, lower and upper case letters
3. Replace any existing bookmarks with this URL:
<https://ficdn.first-quotes.com/Login>
4. Training guides, videos, and FAQs are available on our website – Visit First InSite Lite™ tab

Contact us

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clientservices@firstinsurancefunding.ca

firstinsurancefunding.ca/contact-us