

FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite *Enhanced*

Account Management

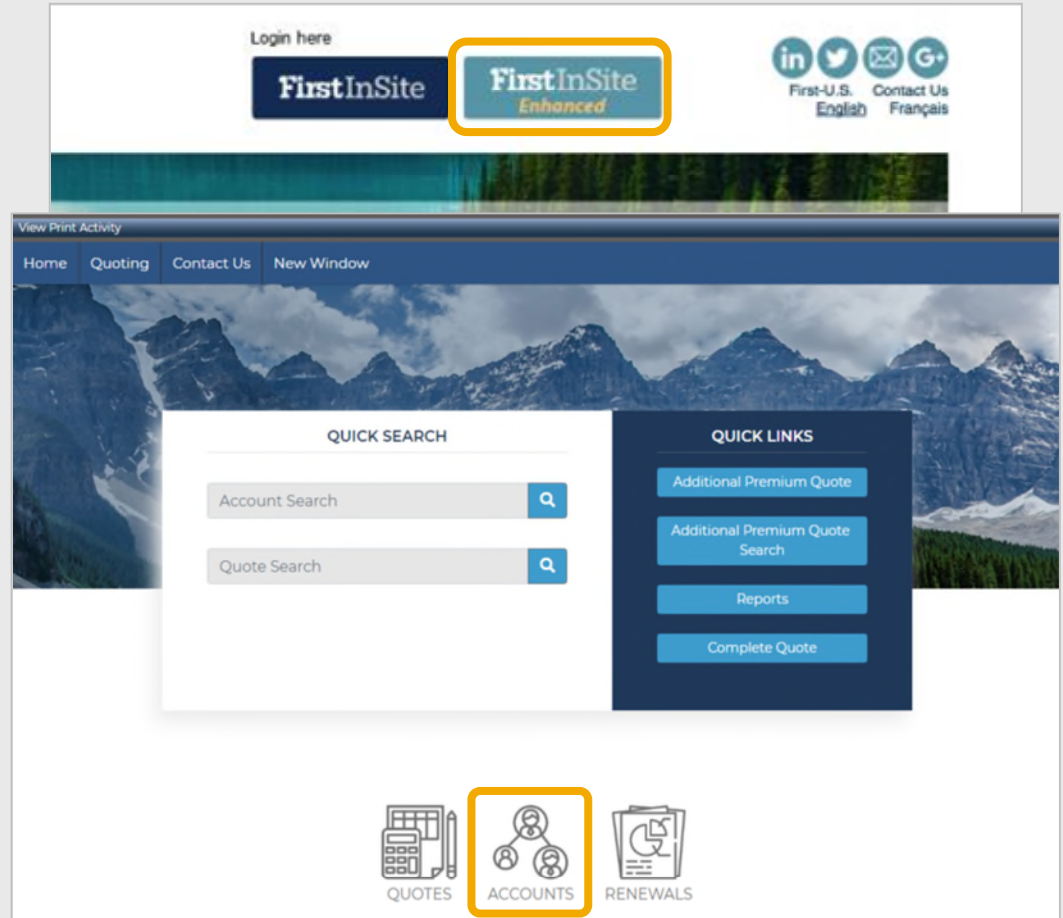
Account Management

Topics covered in this guide:

1. Account Management
2. Disbursements
3. Documents
4. Tips

Login

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



- › 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

- › 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 F

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

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

Summary Financials

Total Premium: 10,900.00
Down Payment: (17,000.00) 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

Account Options... Edit Close
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

Wednesday, 15 January 2020 15:13

Customer Information	Summary Financials
Account Number: 901-13235	Total Premium: 10,900.00
Account Holder: ABC Company	Down Payment: 17,000
Main Address: 123 St Hamilton, ON L0L 0L0	Amount Financed: 8,964.00
Main Phone: (111) 111-1111	Non-Refundable Fee: 0.00
Brokerage: A00034 - Best Insurance Brokers Inc. - Ottawa	Finance Charge: 283.40
Main Address: 4490 Second Street Ottawa, ON K6H 3B7	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 F

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		LOL OLO
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](#)

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

1 / 7

Refer to this agreement number
in all correspondence
901-13235

insured)

Insured (Name and Address)
ABC COMPANY
123 ST
HAMILTON, ON L0L 0L0

Day of month payments are due

Number and frequency of installments

Tips

1. Your login is now your email address
2. Login credentials and a temporary password will be emailed to you within 5 business days from training
3. 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
4. Access to old quoting system for existing loan management only
 - endorsements, funding inquiries, notices, etc.
5. Renewals will be available in the new system
6. Training guides, videos, and FAQs available on our website – Visit First InSite Enhanced tab

Contact Us

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