



FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

First InSite Lite™

Accounts

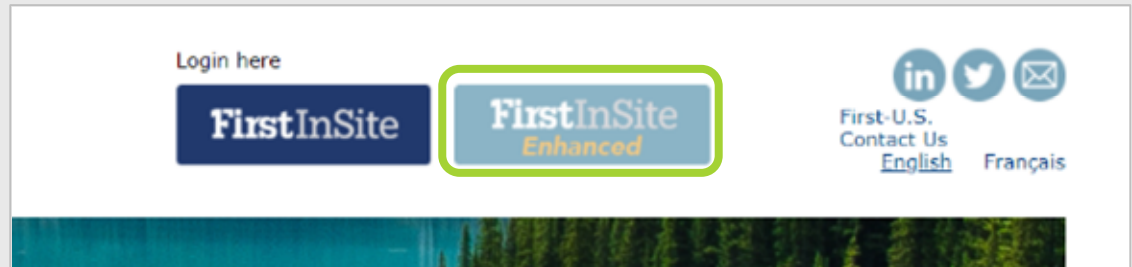
Accounts

Topics covered in this guide:

1. Clients
2. Policies
3. Disbursements
4. Documents
5. Tips

Login

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

This image shows the 'Broker Login' form on the First InSite website. At the top, the 'FIRST INSURANCE' logo is displayed, with 'OF CANADA' and 'FUNDING' on either side, and 'A WINTRUST COMPANY' below. Below the logo is a grey bar with the 'FirstInSite' logo. The main form area has a dark blue background. It features the title 'Broker Login' in white. Below the title, there are two input fields: 'User Name:' with the email 'sarah.smith@bestinsurance.ca' and 'Password:' with a masked password '*****'. Below the password field, there is a 'Forgot Password' link and a 'Login' button.

Accounts

The screenshot displays the 'Accounts' section of the FirstInSite Lite application. At the top, a header bar includes 'Currency: CAD' with a Canadian flag, a language toggle for 'Français', and a 'Logout' button. Below this is a navigation menu with 'Quotes', 'Renewals', 'Accounts' (highlighted), and 'Contact Us'. The main content area features a 'Search for a Client' section with four input fields labeled 'Name', 'Account Number', 'Customer ID', and 'Quote Number'. A 'Search >' button is positioned to the right of these fields.

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

Accounts

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

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

Client Tab

- › You can update select information:
 - › Clients 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 post)
- › Click **Save**

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

- Company Name:** A text box containing '12 policies'.
- Contact Name:** A text box containing 'Best Client'.
- Account Number:** A text box containing '1446'.
- Broker Reference:** A text box containing 'BST123'.
- Document Language:** A dropdown menu showing 'English'.
- Address:** A text box containing '12 policy lane'.
- City:** A text box containing 'Toronto'.
- Province:** A dropdown menu showing 'ON'.
- Postal Code:** A text box containing 'L1L 1L1'.
- Country:** A text box containing 'CA'.
- Email:** A text box with a cursor inside.
- Phone Number:** A text box.
- Email Notices:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Save:** A blue button at the bottom right.

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

FirstInSiteLite Quotes Renewals **Accounts** Contact Us

Account Number 1446


Client **Policies** Disbursements Documents


Policy List 

Policy Number	01	Loan:	Original Loan	Coverage:	A/M - ACCIDENT & MEDICAL
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00002 - Aviva Canada - TOR
		Premium:	1,000.00	MGA:	
Policy Number	002	Loan:	Original Loan	Coverage:	AIR - AIRCRAFT
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00006 - Chubb Insurance - TOR
		Premium:	1,000.00	MGA:	
Policy Number	003	Loan:	Original Loan	Coverage:	B/A - BUSINESS AUTO
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00016 - Liberty Insurance Company
		Premium:	1,000.00	MGA:	
Policy Number	004	Loan:	Original Loan	Coverage:	AIRPTL - AIRPORT LIABILITY
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00013 - Inter Hannover Canada
		Premium:	1,000.00	MGA:	G00007 - Profescau Assurance Specialisee Inc.
Policy Number	005	Loan:	Original Loan	Coverage:	AUTO - AUTOMOBILE
		Effective Date:	24/05/2017 (12 months)	Insurance Carrier:	C00011 - HDI-Gerling Industrial Insurance Company
		Premium:	1,000.00	MGA:	G00003 - Talles Insurance Group - Toronto

Disbursements Tab

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

Currency: CAD 

Français  Logout

FirstInSite Lite

QuotesRenewalsAccountsContact Us

Account Number 1446

Client

Policies

Disbursements

Documents


Disbursements


Type:	Original	Scheduled Funding Date:	08/07/2017
Status:	Paid	Actual Funding Date:	10/07/2017
		Funding Amount:	12,000.00
		Total:	12,000.00

1 items

Documents Tab

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

Currency: CAD 

Français  Logout

FirstInSite Lite

QuotesRenewalsAccountsContact Us

Account Number 1446

Client

Policies

Disbursements

Documents

Documents

Type	Date Created	Pages	Reprint
Notice of Intent to Cancel	25/07/2017	1	Reprint
Notice of Intent to Cancel	23/06/2017	1	Reprint
Notice of Acceptance	08/06/2017	2	Reprint

3 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

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

