

FIRST INSURANCE®  
— OF CANADA — FUNDING  
A WINTRUST COMPANY

**First InSite** Lite™  
Renewals



# Topics covered in this guide

- › Renewals
- › Tips

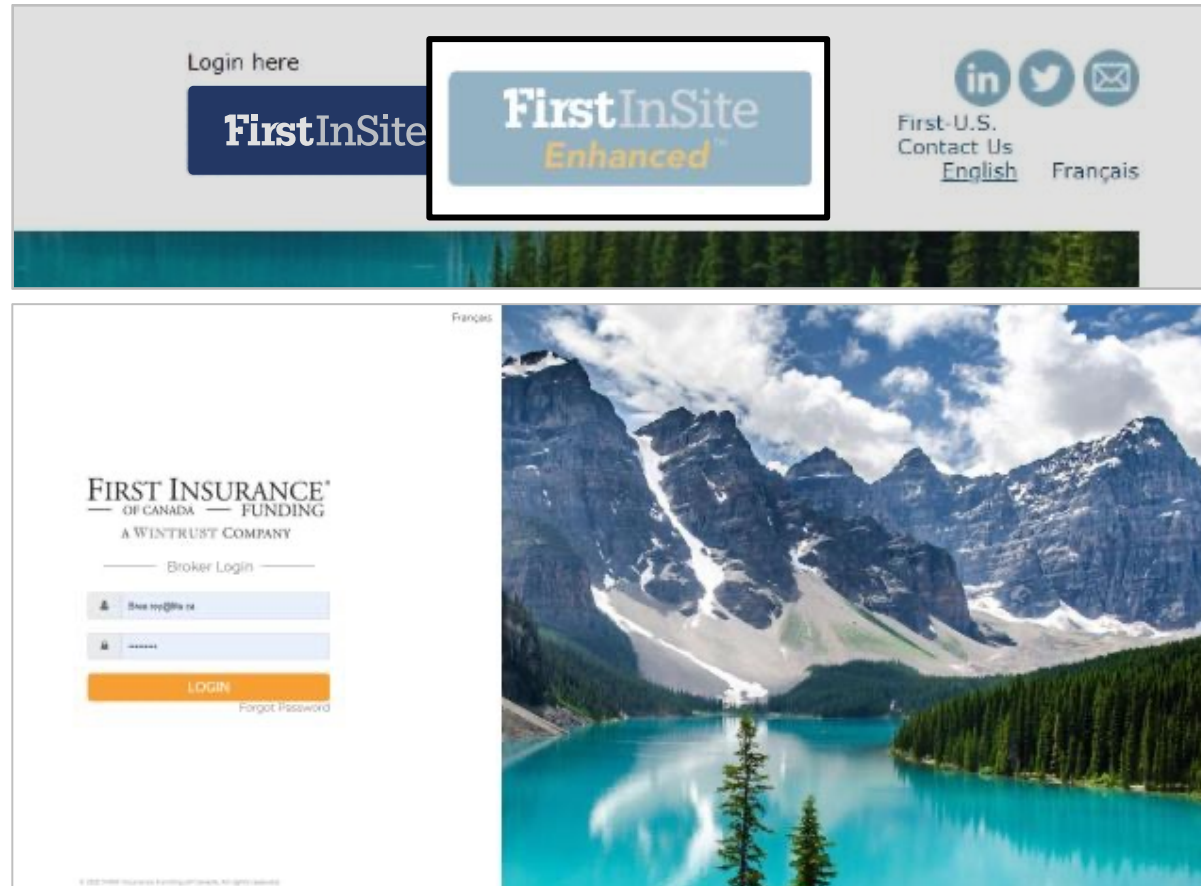


# First InSite Lite™



# Log in to First InSite Lite™

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







# Renewals

# Renewals

- › Click on **Renewals** in the top menu bar
- › Search for a renewal by entering your client's name and/or account number

The screenshot shows the top navigation bar of the FirstInSite Lite website. The currency is set to CAD with a Canadian flag icon. The language is set to Français, and there is a Logout button. The main navigation menu includes Quotes, Renewals (which is highlighted), Accounts, Additional Premium, and Contact Us. Below the navigation bar is a search section titled "Search for a renewal". It contains two input fields: "Name" and "Account Number", and a "Search >" button.

Currency: CAD  Français  Logout

**FirstInSite** Lite

Quotes Renewals Accounts Additional Premium Contact Us

**Search for a renewal**

Name

Account Number

Search >

# Renewals

- › List of relevant accounts up for renewal will appear. Locate the account you wish to action and click **Renew**

### Search for a renewal

Name  Account Number

Account Number	Creation Date	Name	Broker Contact	Renew
71706		Regional 1 Airlines Ltd.		<a href="#">Renew</a>
149491		Ensign Energy Services Inc.		<a href="#">Renew</a>
120312		Nextraction Energy Corporation		<a href="#">Renew</a>
77190		DAC Aviation International Ltée		<a href="#">Renew</a>
935	13/02/2017	Bob Smith	Jennifer Davis	<a href="#">Renew</a>

5 items



# Renewals

- › The information from last year's contract will populate
- › Review and update client information, if necessary

## Renewals

Type	Contract	Line of Business	
Quote	Regular ▼	Commercial ▼	

### Client

Company Name	Nextraction Energy Corporation		Document Language
Contact Name	Kent Edney		English ▼
Address			
254 – 250 6th Avenue SW PO Box 20004 Bow Valley			
City	Province	Postal Code	Country
Calgary	AB ▼	T2P 4H3	Canada
Email	Phone Number		
test@policybill.com	416-555-1234		



# Renewals

- › Update the premium and policy details, if necessary
- › Enter the Effective Date
- › Add another policy, if necessary
- › Click **Continue**

### Total Financing Contract

Premium	Taxes	Policy Fees	Total Premium	Contract Effective Date
15,092.00	0.00	0.00	15,092.00	15/08/2017
Financed Broker Fees	Nonreimbursable Broker Fees	Total Payable	Minimum Earned Premium	
0.00	0.00	15,092.00	0.00	0.000 %

### Policy

Policy Number	Effective Date	Coverage Type	Policy Terms	
tba	15/08/2017	PACKAGE	12	Months
Carrier	MGA			
Chubb Insurance - TOR	Totten Insurance Group - Toronto			

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
7,882.00	0.00	0.00	7,882.00	0.00 0.000 %

### Policy

Policy Number	Effective Date	Coverage Type	Policy Terms	
TBD	15/08/2017	-- Select One --	12	Months
Carrier	MGA			
Aviva Canada - TOR	HUB International Ontario Ltd.			

Premium	Taxes	Policy Fees	Total Premium	Minimum Earned Premium
7,210.00	0.00	0.00	7,210.00	0.00 0.000 %

[Add another policy](#)

[Cancel](#) [Continue](#)

# Renewals

- › Select the desired Pricing Program
- › Edit the Down Payment, if necessary
- › Edit the First Installment Date, if necessary
- › Click **Create Payment Options** or **Process Renewal**

### Quotes

#### Terms and Pricing Programs

12 Equal Installments

17% Down, 10 Installments

20% Down, 9 Installments

Personal - 17/10, ON, 30 Days

#### Financials

APR	<input type="text" value="13.489 %"/>	
Flat Rate	<input type="text" value="5.218 %"/>	
Total Premium	<input type="text" value="15,092.00"/>	
Down payment	<input type="text" value="2,565.64"/>	<input type="text" value="17.000 %"/>
Amount Financed	<input type="text" value="12,526.36"/>	
Finance Charge	<input type="text" value="787.44"/>	
Application Fee	<input type="text" value="35.00"/>	
Total Payments	<input type="text" value="21,809.50"/>	
Number of Installments	<input type="text" value="10"/>	
Installment Amount	<input type="text" value="2,180.95"/>	First Installment Date <input type="text" value="15/09/2017"/>

[< Back](#)

[Create Payment Options](#) [Process Renewal](#)



# Processing Renewals

- › Enter any account submission notes you wish us to be aware of
- › Click to acknowledge the broker representations
- › Click **Submit Renewal**

### Account submission notes

A note is only necessary if you would like to communicate something specific about this contract to the FIRST Insurance Funding services team.

### Digital signature

Agent or Broker representations

By selecting "Submit Renewal" you warrant and agree to the Agent or Broker representations as outlined in the contract. You further agree that the brokerage has been furnished with these representations and you have the authority to submit this contract and agree to the representations.

You further warrant that the brokerage has collected the down payment, if applicable, and any other sums due as required by the agreement and is holding same or they are remitted with this agreement.


[< Back](#) [Submit Renewal](#)



# Processing Renewals

- › Click **Print** to print/save or x window to close

Payment Options

  
**Best Insurance Inc.**

**Best Insurance Brokers Inc. - Ottawa**  
4490 Second Street,  
Ottawa, ON, K6H 3B7

Insured/Borrower:  
ABC Company

**Pay Now**

Click the Pay Now button or view online at  
[policypayments.com/Best](http://policypayments.com/Best) using your  
Policy Payments ID:  
**157230**

**Payment Options Form**

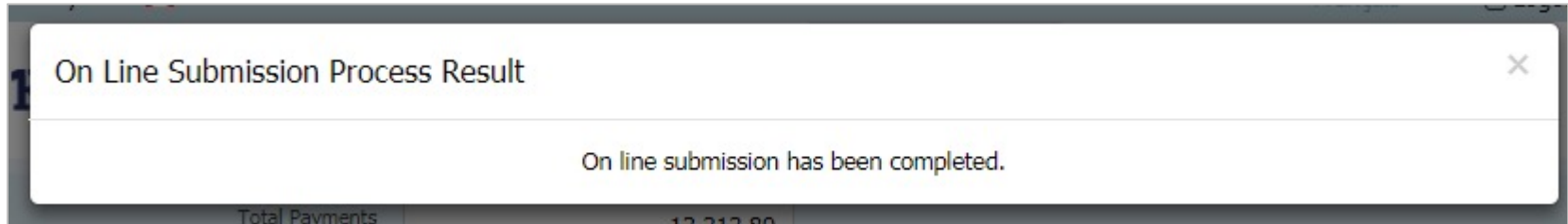
Monthly Payment Plans	Cost
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Client Email Address:

**Print** **Email to self** **Email to self & client** **Email to client**

# Processing Renewals

- › Upon closing the Payment Options window, you will receive a confirmation message that your on line submission has been completed



# 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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1 888 232 2238

[clientservices@firstinsurancefunding.ca](mailto:clientservices@firstinsurancefunding.ca)

[firstinsurancefunding.ca/contact-us](https://firstinsurancefunding.ca/contact-us)