



FIRST INSURANCE®
— OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite *Enhanced*™

Account Management

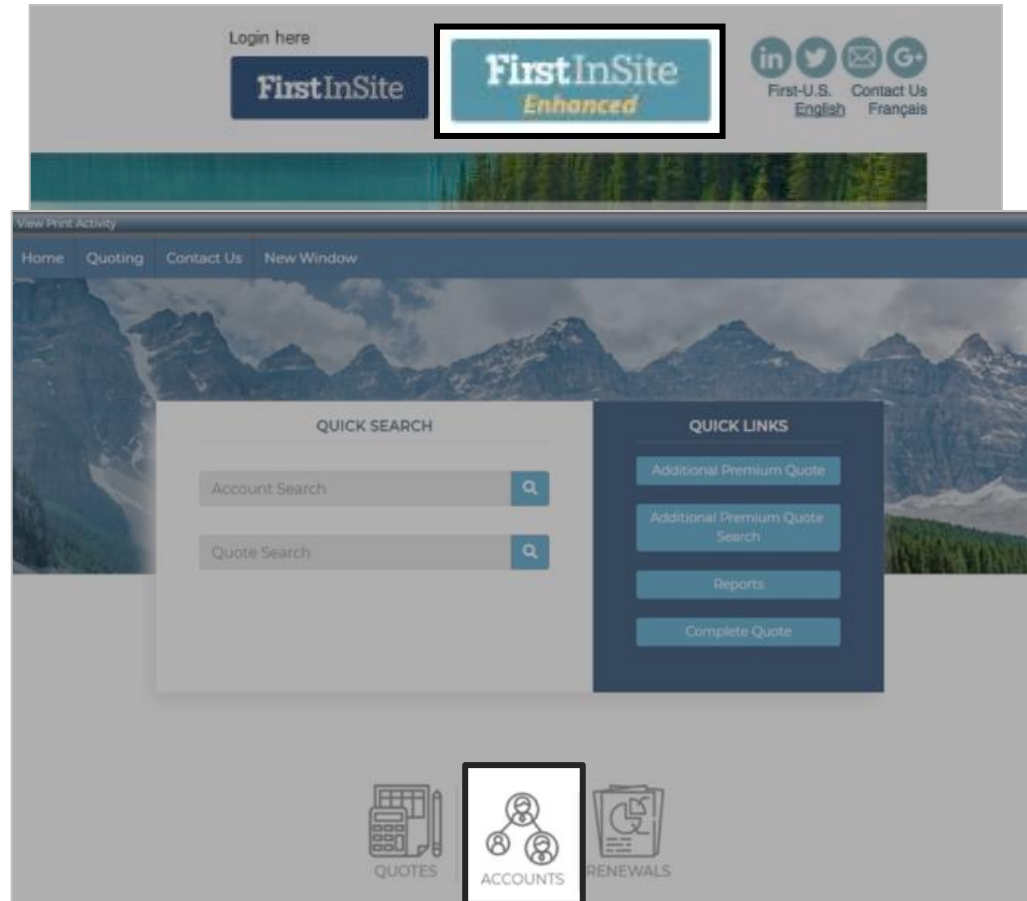
Agenda

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	AFS
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

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: XYZ1234

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: --	Next Intent Date: 06/12/2023
Creation Date: 16/02/2023	Scheduled Cancellation Date: 21/12/2023
Created By: Bree	Cancellation Hold Date: --
Effective Date: 12/10/2022	Manual Cancellation Date: --
Archive Date: --	Next Reinstatement Date: --
Balance Due Date: --	Next Late Fee Date: --

First Payment Due Date: 12/11/2022	Last Intent Date: --
Next Payment Due Date: 12/05/2023	Last Cancellation Date: --
Final Payment Due Date: 12/08/2023	Last Reinstatement Date: --

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

Activity - Best Insurance Brokers Inc.

Customer Account History Report

Customer Account History Report

Printed: Account Number: 13235
 Requested by: Sarah Smith Wednesday, 11 January 2023 10:13

Current / Flatted	Customer Information	Summary Financials
Account Number: 901-13235	Account Holder: ABC Company	Total Premium: 10,900.00
Main Address: 123 St Hamilton, ON L0L 0L0	Brokerage: A00034 - Best Insurance Brokers Inc. - Ottawa	Down Payment: 1,936.00
Main Phone: (111) 111-1111	Broker Contact: Best Broker	Amount Financed: 8,964.00
Home Phone: (111) 111-1111	Broker Phone: (416) 216-1773	Non-Refundable Fee: 0.00
	Broker Email: uat@firstinsurancefunding.ca	Finance Charge: 283.40
	Customer ID: XYZ1234	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

Received Date	Next Intent Date	Account Balance (inc. fees)	Current Amount Due
--	06/12/2023	3,415.56	3,415.56

Client Status - 901-13235 - ABC Company

Installation Schedule

#	Due Date	Late Fee Date	Payment Applied	Installment Amount	Adjustment	Original Loan
1	12/11/2022	12/15/2022	16/12/2022	924.74		924.74
2	12/12/2022	12/15/2022	16/12/2022	924.74		924.74
3	12/01/2023	12/15/2022	16/12/2022	924.74		924.74
4	12/01/2023	12/15/2022	16/12/2022	924.74		924.74
5	12/01/2023	12/15/2022	16/12/2022	924.74		924.74
6	12/04/2023	12/15/2022	12/04/2023	924.74		924.74
7	12/05/2023	12/15/2022		924.74		924.74
8	12/04/2023	12/15/2022		924.74		924.74
9	12/01/2023	12/15/2022		924.74		924.74
10	12/08/2023	12/15/2022		924.74		924.74
			8,964.00	0.00	9,247.40	

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 P

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

From Quote: 7136

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:

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

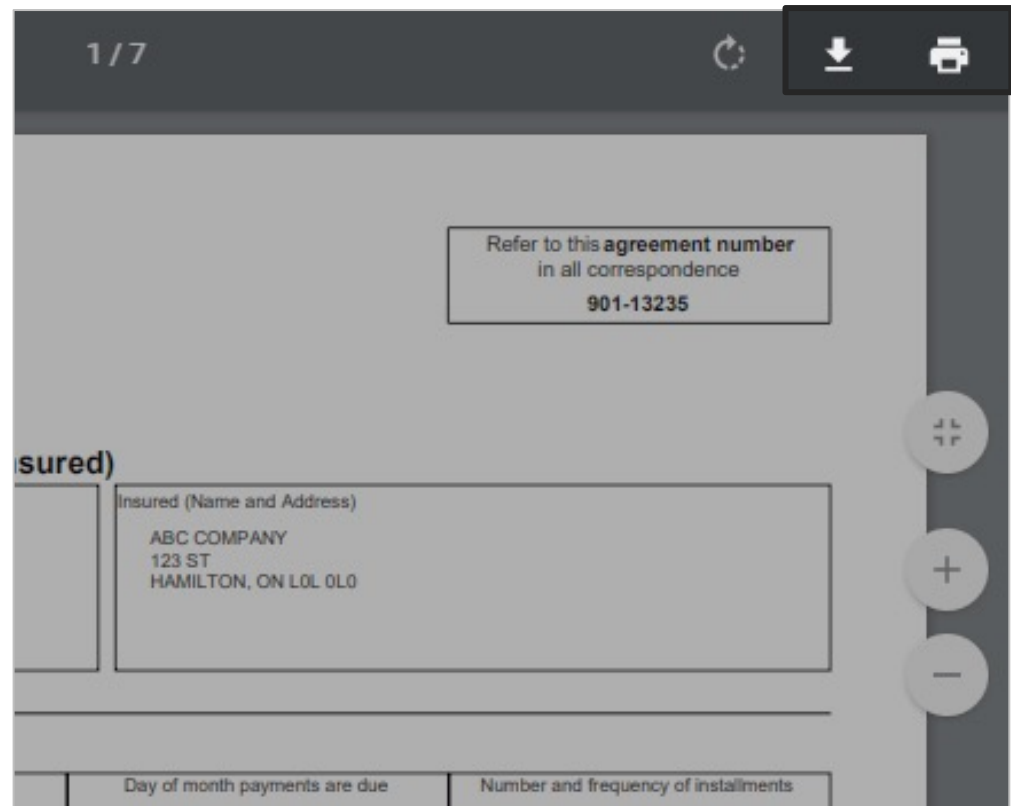
Refer to this **agreement number** in all correspondence
901-13235

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