FIRST INSURANCE FUNDING
OF CANADA
A WINTRUST COMPANY

FirstInSite Enhanced™

Account Management

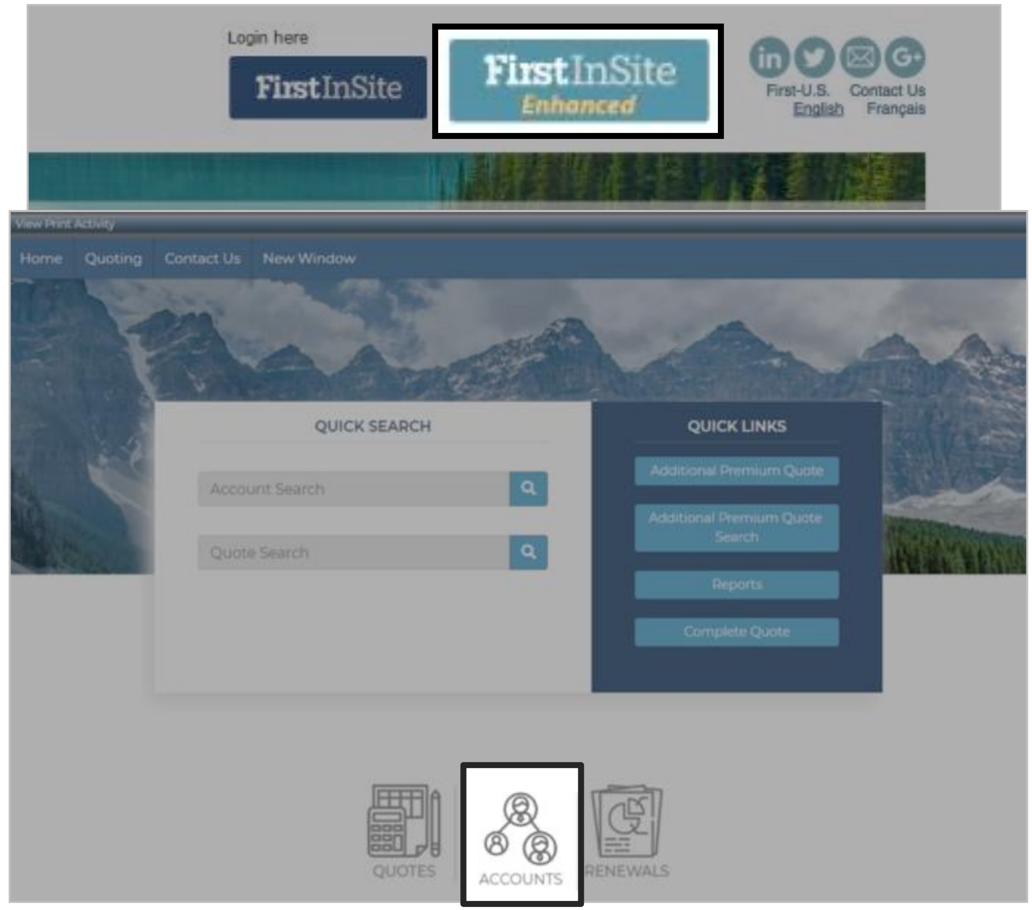
Agenda

Topics covered in this guide:

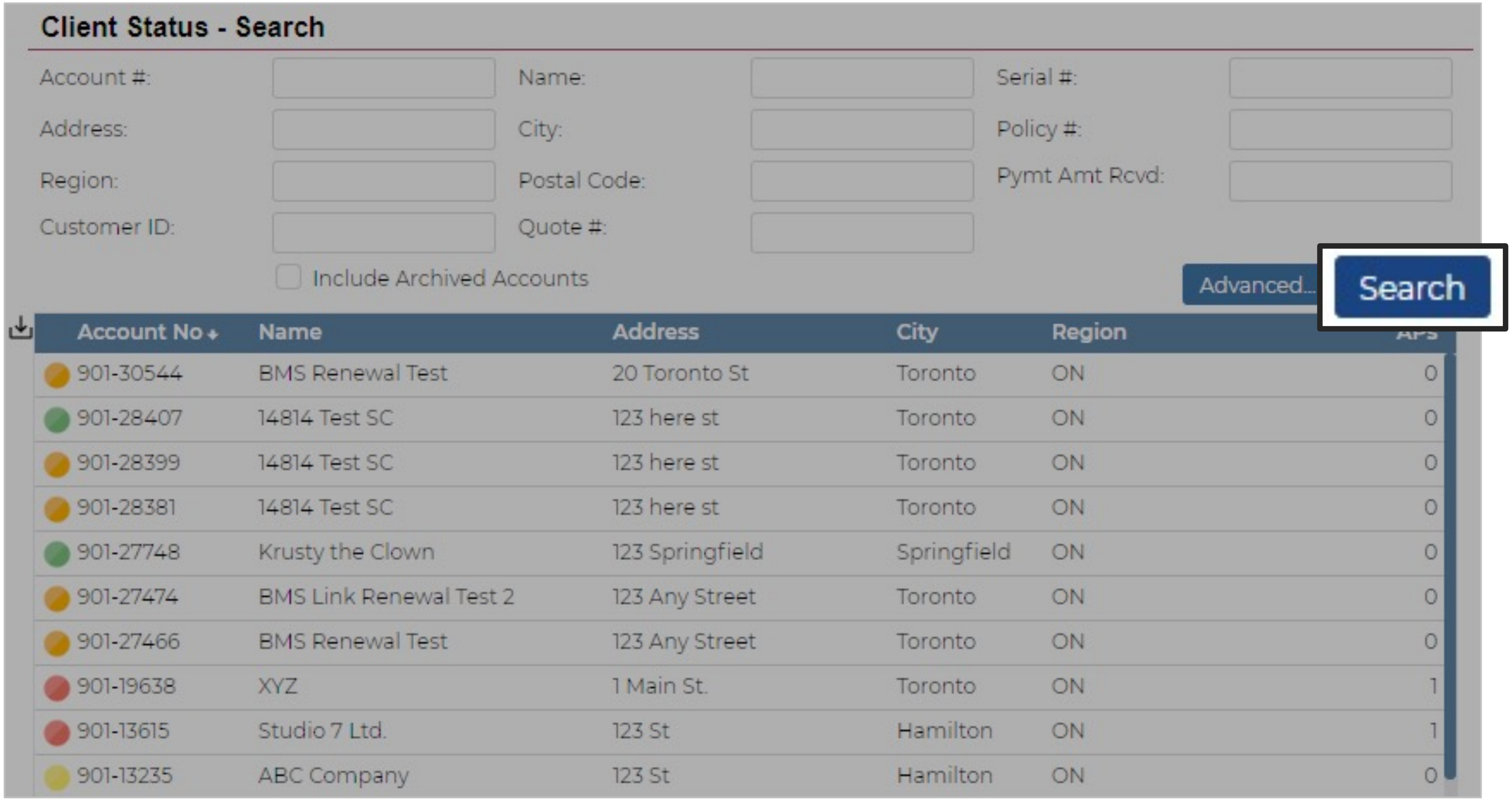
1. Account Management
2. Disbursements
3. Documents
4. Tips

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

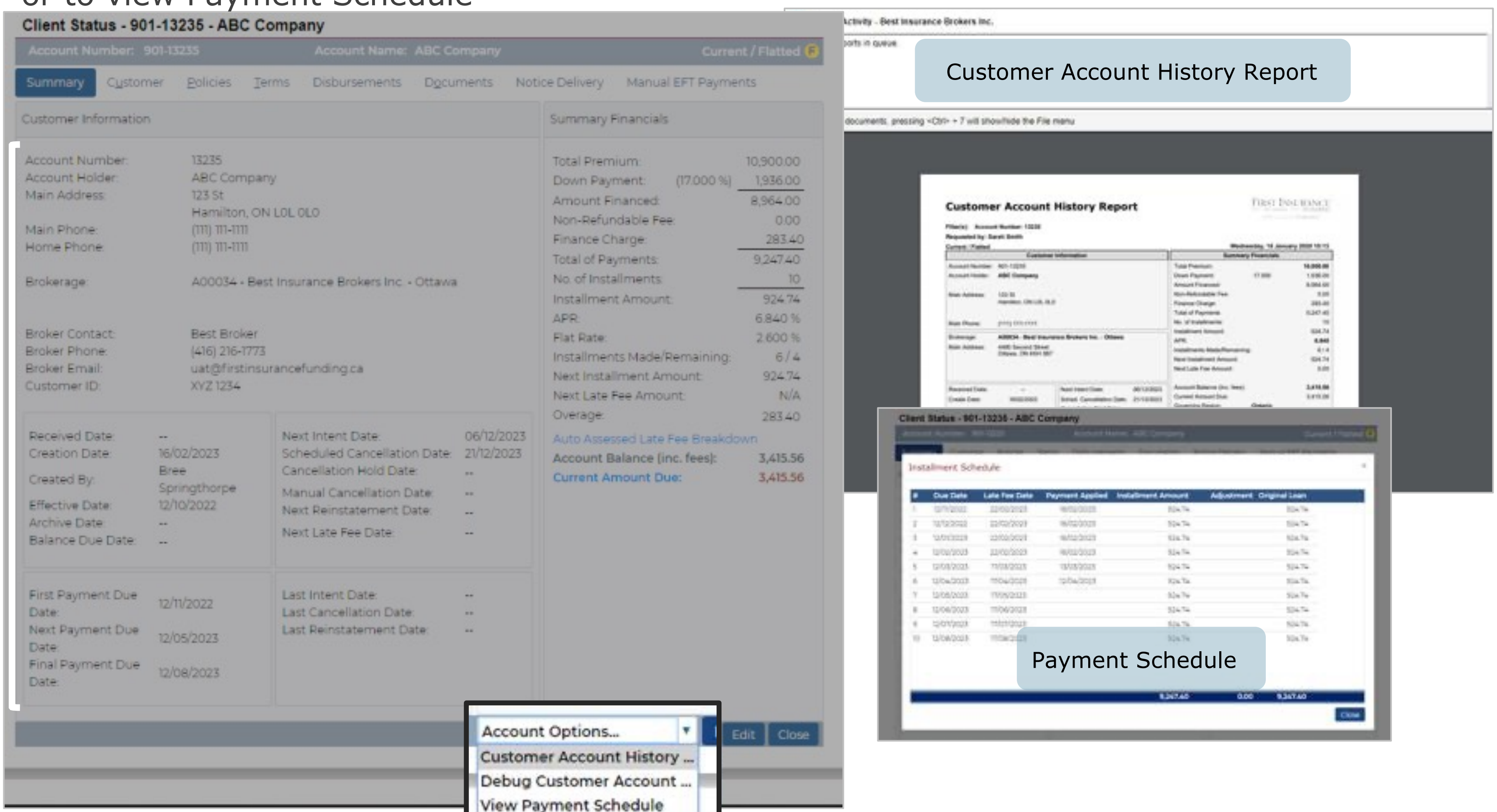


Account No	Name	Address	City	Region	APs
901-30544	BMS Renewal Test	20 Toronto St	Toronto	ON	0
901-28407	14814 Test SC	123 here st	Toronto	ON	0
901-28399	14814 Test SC	123 here st	Toronto	ON	0
901-28381	14814 Test SC	123 here st	Toronto	ON	0
901-27748	Krusty the Clown	123 Springfield	Springfield	ON	0
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

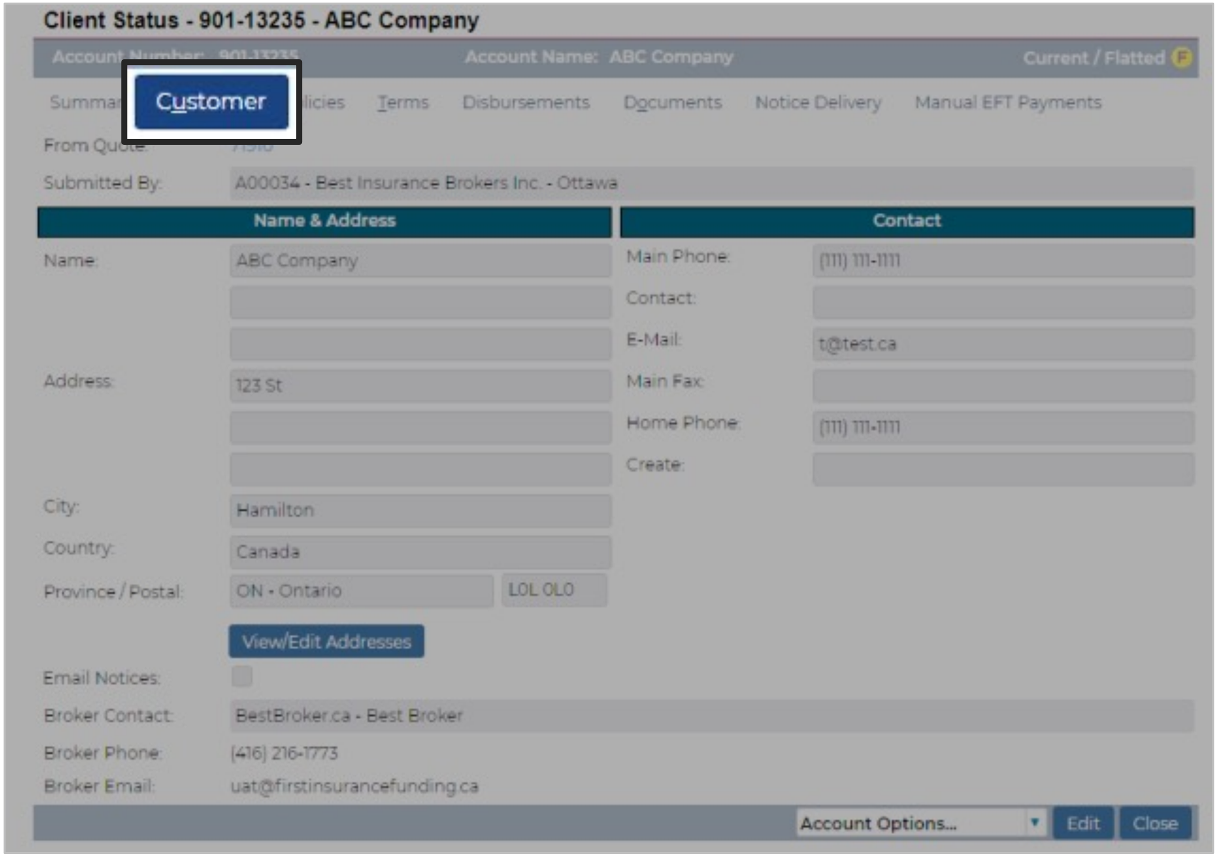
- Summary tab provides a dashboard of the client’s account

- Click **Account Options** drop down to view or print Customer Account History, Report or to view Payment Schedule



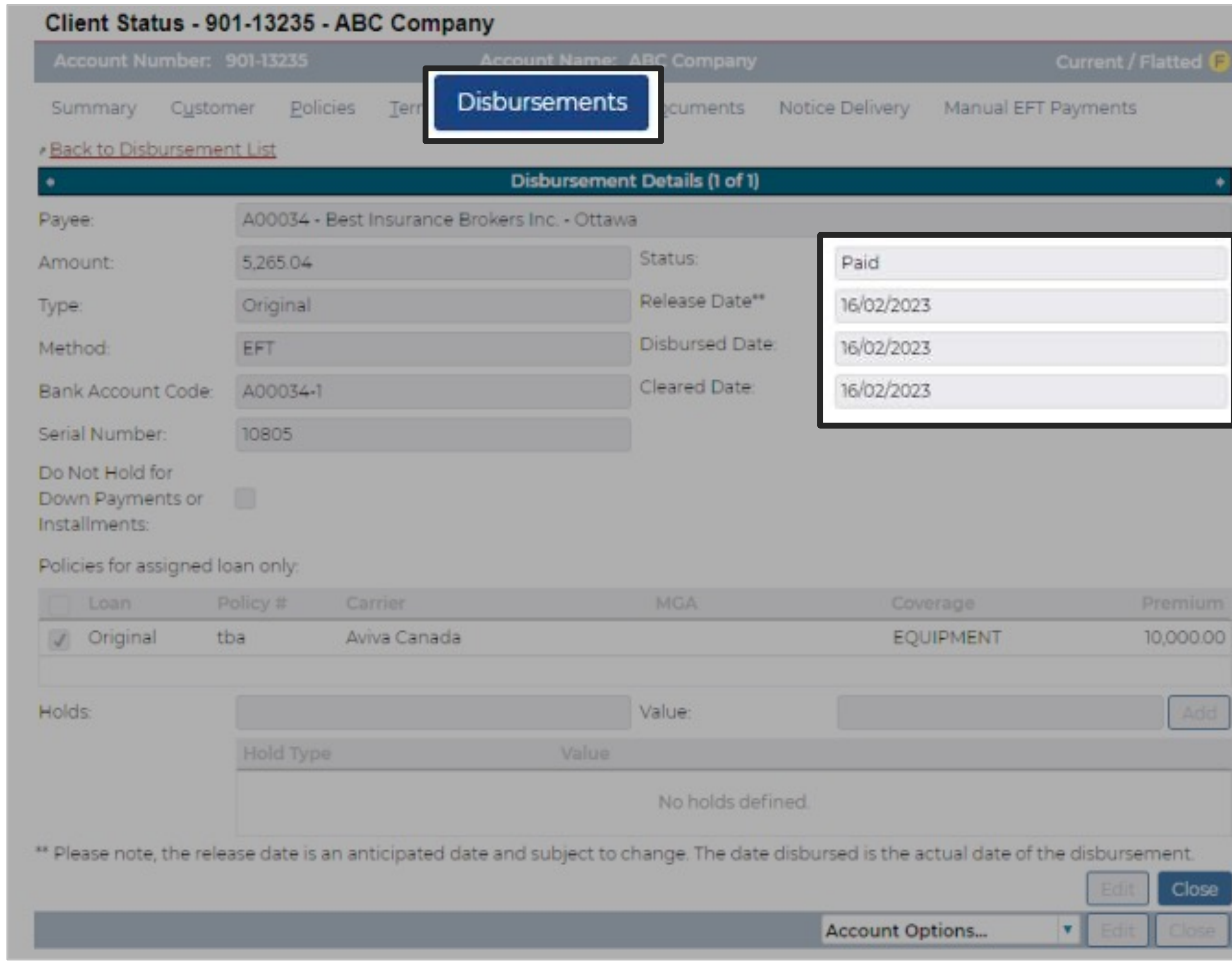
Customer

- 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



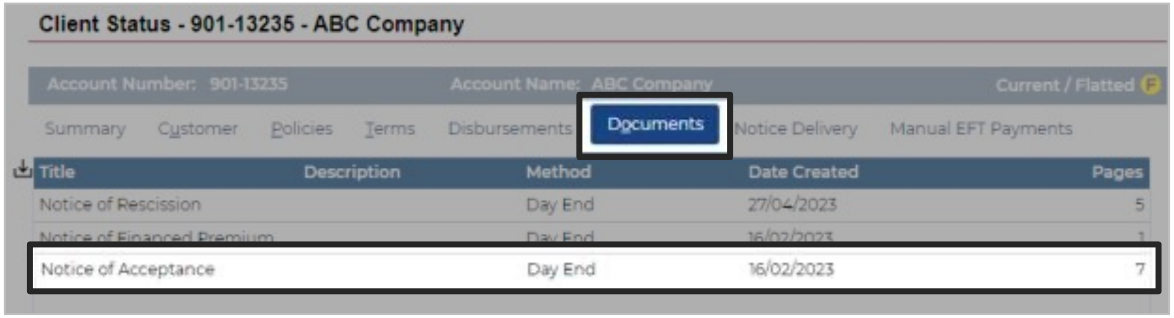
Disbursements – Broker Funding

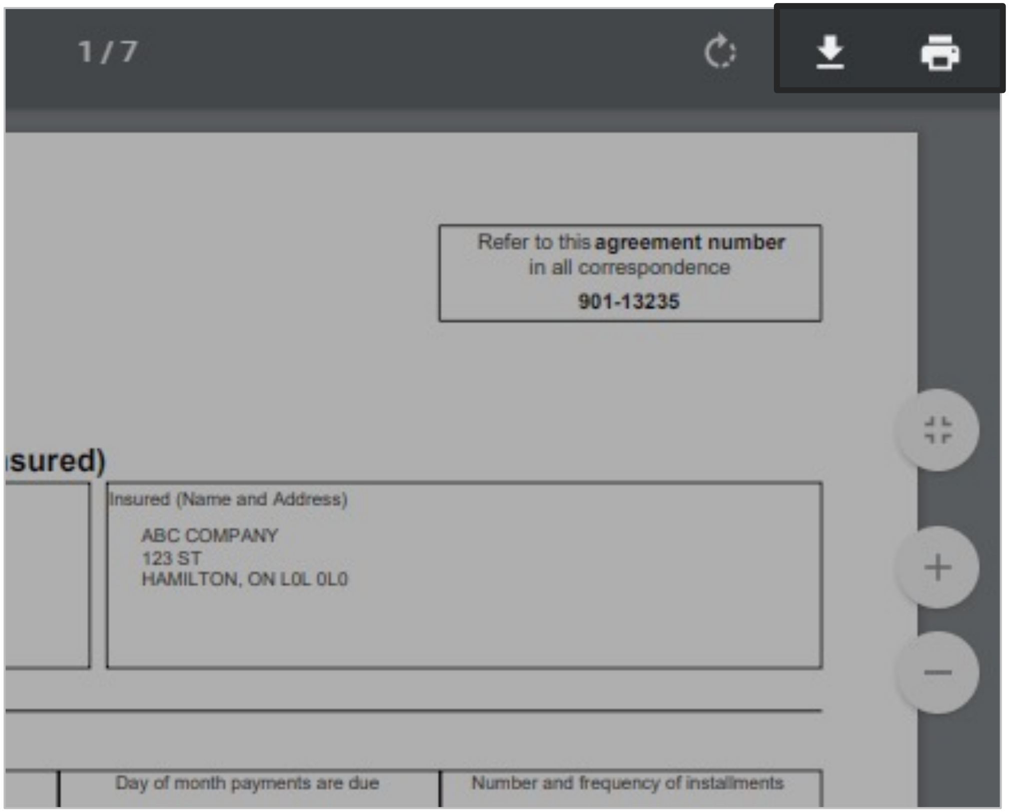
- Disbursements tab outlines broker funding details
- View the status of funding (Paid, Unpaid) and the expected funding date



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





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