

Topics Covered in this Manual:

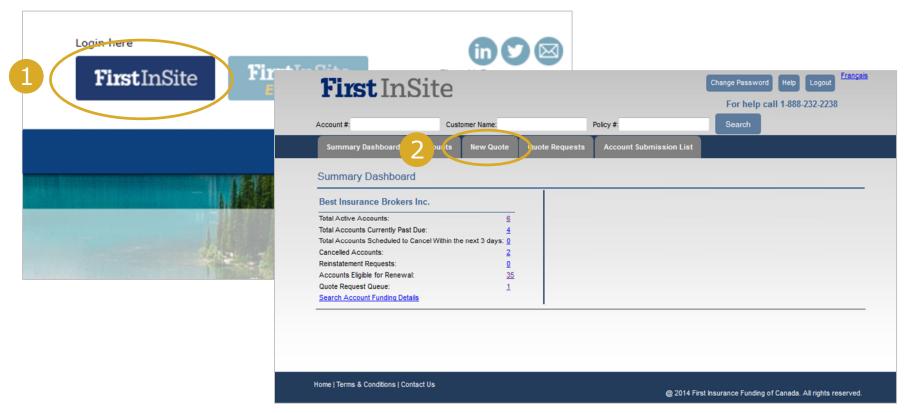
- 1. Creating a quote | Website
- 2. Creating a quote | Quick Link



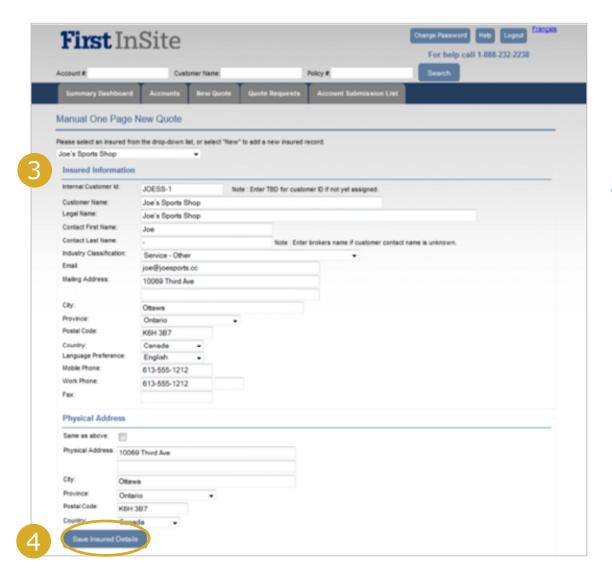


FirstInSite

- Login by clicking the First InSite button on <u>firstinsurancefunding.ca</u> using your User Name and Password
- 2. Using the tabs at the top, select **New Quote**

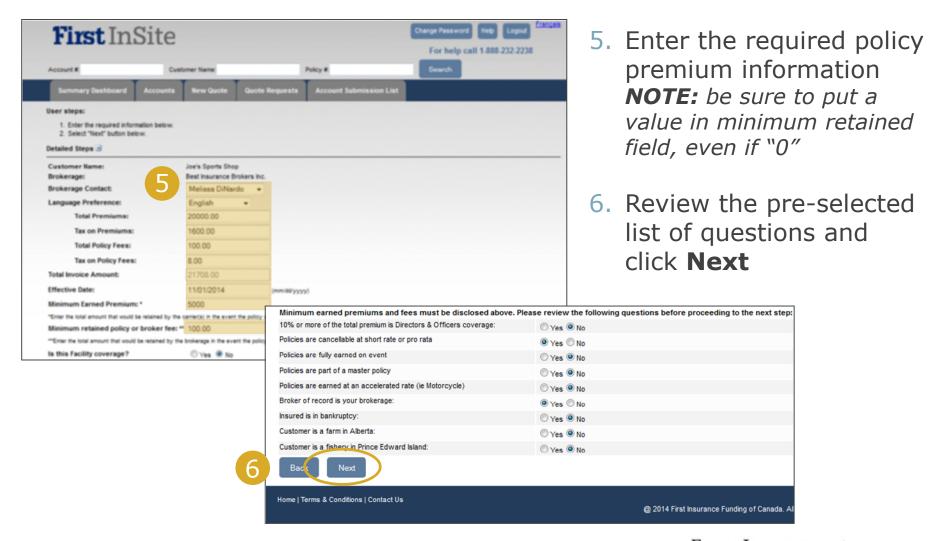




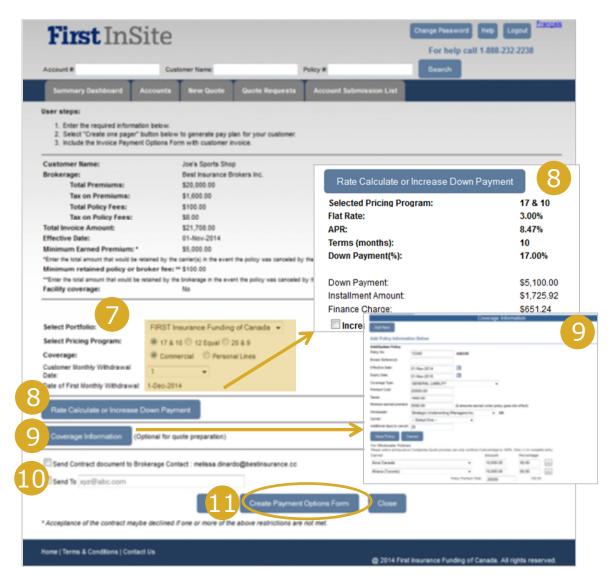


- 3. Select an insured from the drop-down list, or select "New" to add a new insured record
- 4. Review or Enter
 Insured Information
 and click **Save**Insured Details









- 7. Select Pricing Program and coverage details
- 8. Optional Click Rate Calculate or Increase Down Payment for rate calculator
- 9. Optional Coverage
 Information fields
 Note: optional during quoting
 stage. Can complete upon
 submitting
- 10. Indicate whether you would like to send Payment Options Form via email
- 11. Click on **Create Payment**Options Form PDF or email



12. The Invoice Payment Options form is generated and will either appear on your screen, or in your inbox, depending on your selection in Step #11.

Invoice Payment Options

Insured: Joe's Sports Shop 10069 Third Ave Ottawa, ON, K6H 3B7 Tel: (613) 555-1212

Policy Payments ID	140000939
Account No.	JOESS-1
Invoice Date	September 18, 2014
Balance Due	\$21,708.00
Currency	CDN

Please return payment or signed form so as not to affect your coverage. Please mail to:

Best Insurance Brokers Inc. 4490 Second Street Ottawa, ON, K6H 3B7 Tel: (613) 555-1212

A. Payment in Full

Send cheque or money order for \$21,708.00. Make all cheques payable to Best Insurance Brokers Inc.. Payment is due the effective date of the insurance coverage.

B. Credit Card

To complete your payment by credit card go to http://69.172.64.219/PolicyPayments/Best and enter ID: 140000939 and follow directions on screen. An administration fee may apply.

C. Monthly Instalments – PLEASE READ THE ATTACHED AGREEMENT AND SIGN WHERE INDICATED				
TOTAL PREMIUMS INCL.TAX	DOWN PAYMENT	10 MONTHLY INSTALLMENTS OF	FINANCE CHARGE	FLAT RATE
\$21,708.00	\$5,100.00	\$1,725.92	\$651.24	3.00%





FirstInSite

Creating a Quote | Quick Link

Our Quick Link gives you personalized access to an expedited process. This is also a mobile-friendly version of First InSite.

Welcome Melissa DiNardo

Brokerage: Best Insurance Brokers Inc.

Your brokerage has activated you as a FIRST Canada user, which gives you access to the following payment plans:

FIRST Insurance Funding of Canada

FIRST Canada makes creating a contract ready for your clients signature simple.

To access FIRST Canada, please visit us at www.FIRSTInSite.ca

Your User Name: melissa

Your Temporary Password: 02587

Your personalized Quote Request Form is available by selecting this link:

www.PolicyBill.com/BrokerQuote/?196252ec

Save this email or book mark the link for future quoting.

You will be required to change your password when you first sign on. Please note passwords are case sensitive.

With your user access, you will be able to manage your clients monthly pay plan more efficiently.

FIRSTInSite.ca gives you access to on-line endorsement processing, account payment histories and access to all notices sent to your client.

Feel free to contact us at 1 888 232 2238 or by email to clientservices@firstinsurancefunding.ca should you have any questions regarding your access.

Thanks & enjoy the rest of your day! FIRST Insurance Funding of Canada

TF: 1 888 232 2238

E: clientservices@firstinsurancefunding.ca

Tip:
bookmark
or drag
and drop
this email
to your
desktop so
this link is
always
handy



- 1. Click on the Quick Link in your welcome email to access the expedited quoting process; no login required
- 2. Enter Insured Information and click Continue

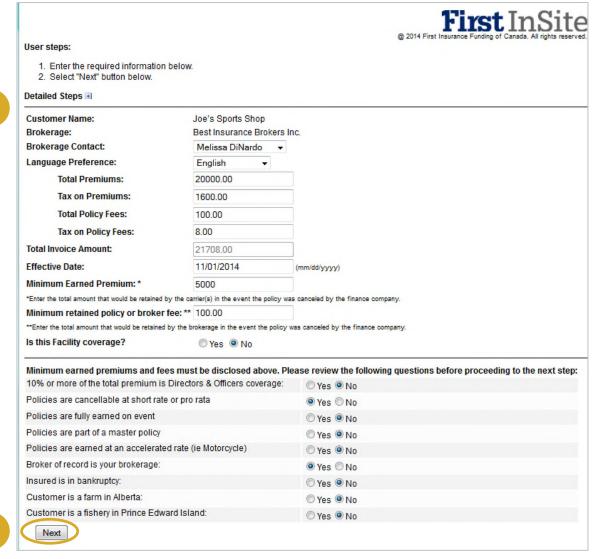
Insured Information			
Brokerage:	Best Insurance Brokers	Inc.	
Broker Name:	Melissa DiNardo		
Brokerage Customer Id:	JOESS-1		
Customer FullName:	Joe's Sports Shop		
Customer Email:	joe@joessports.cc		
Customer Street:	10069 Third Ave		
Customer City:	Ottawa		
Customer Province:	Ontario	▼	
Customer Postal Code:	K6H 3B7		
Broker Email:	melissa.dinardo	@bestinsurance.cc	
Continue			



3. The screen below will appear if the system has found a matching record. Click **New Client** if it is a new client, or **Select** if you want to proceed with the existing client profile.







- 4. Complete premium information
- 5. Review the preselected list of questions and click Next



FIRST INSURANCE^{*} A WINTRUST COMPANY



- 6. Select Pricing Program
- 7. Optional Coverage
 Information fields
 Note: optional during
 quoting stage. Can complete
 upon submission
- 8. Enter the email address where you would like Payment Options Form emailed
- Click on CreatePayment Options Form



10. The Invoice Payment Options form is generated and will be sent to you via email.

Invoice Payment Options

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Policy Payments ID	140000939
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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